Business Support on the Humber North Bank, post 2011

The identification of current and future, Business Support Provision solutions beyond 2011 on the Humber, North Bank

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1. Executive Summary

Background:

1.1 This study has identified key future requirements for businesses located in the Hull City and East Riding of Yorkshire regions (Humber North Bank) to be able to take advantage of several emerging 'Green' industry opportunities and any potential gaps in the business support provision available to them, beyond 2011. Key emerging markets include:

i) Siemens Green Port manufacturing and wind turbine preparation site at Alexandra Docks, Hull

ii) Alstom's Carbon Capture Project, at Drax Power Station, Selby.

iii) Sirius's Potash Mine at Whitby.

1.2 The study was commissioned as a joint venture by Hull City Council and East Riding of Yorkshire Council. Towards the end of this study, a pan Humber Local Enterprise Partnership (LEP) was established, however this did not change the aims or scope of this particular study.

1.3 The proposed Siemens investment at Alexandra Docks, Hull offers the largest, potential opportunity for the region. A formal investment decision / agreement was not in place with Siemens during the study period which restricted the amount of primary data that could be gathered in regards to their specific wind turbine nacelle manufacturing operations and the extent to which local businesses were to be involved.

Opportunities

1.4 Hull and East Riding are in a unique position, with a number of emerging opportunities occurring, all offering businesses within the area the chance to capitalise upon new industry, either through directly engaging within the supply chains, or through the supply of business or leisure services.

1.5 The selection of Hull, by Siemens for the development of Green Port, along with Alstom's partnership with Drax to develop the Carbon Capture System, and the Yorkshire Potash Project has the potential to alleviate the region's current reliance upon public sector organisations for revenue, which is currently the highest in the country. [1]

[1] BMG Research. (2011) Yorkshire and Humber Business Survey.

1.6 The potential for growth, as a result of these emerging sectors may also offer opportunities for businesses within this area, which are currently more likely to report a decreased turnover than any other region (43%).[2]

Approach:

1.7 The study was conducted during May and June 2011 and was conducted in three stages including:

i) A literature review stage, looking at existing research on business support provision and opportunities within emerging markets.

ii) Seminar attendance and meetings with organisations raising awareness of the emerging market opportunities.

iii) A qualitative research stage, comprising of two parts. The first involved 128 in-depth surveys of businesses within the region, completed via website surveys, telephone and face to face interviews. The second was a survey of business support providers, to identify current provision available.

1.8 The aims of the study were:

i) To identify what business support provision (BSP) will be needed by businesses in the East Riding of Yorkshire and Hull City regions to take advantage of the emerging growth opportunities in the Humber region beyond 2011.

ii) To inform the RGF bid team (Round 2) of any gaps in the future BSP available to meet these needs post 2011.

1.9 In order to meet these aims, the study identified a number of primary questions which provided the basis for the approach for the study:

i) What are the emerging sector opportunities for businesses within the area?

ii) What business support provision will businesses in the area need, in order to take advantage of the emerging sector opportunities?

iii) What business support provision will be available post 2011 and therefore what does the RGF bid need to include to bridge the gap?

[2] IFF Research. (2011) BIS Small Business Survey 2010.

1.10 Each element of the study, including the literature review, the attendance of seminars and the qualitative research all worked to answer these core questions.

Business Support Requirements:

1.11 A business support programme, which takes the form of an intervention is recommended in order to support businesses within the area to take advantage of the opportunities surfacing within the region. The intervention would include four stages:

i) BUSINESS GROWTH ENABLER: Health check businesses for signs of stagnation and assist / mentor individual business owners / management teams to create bespoke interventions to remove hidden barriers to growth and stimulate business prosperity.

ii) MAKE OPPORTUNITIES VISIBLE: Fully engaging and stimulating the regional business community by providing them with clear and detailed visibility of the direct and indirect future opportunities and prospects open to the region. This information will be provided in good time for them to prepare to be able to take full advantage of them. The information will be provided in a way which generates a climate of prosperity and economic confidence for the region based primarily around the renewable energy, carbon capture and storage, environmental development and new Green opportunity sectors.

iii) MAKE OPPORTUNITIES ACCESSIBLE: Provide a programme for selected businesses in relevant sectors to undergo mentoring, training and intervention support to enable them to develop accredited systems, facilities and management capabilities to gain “approved supplier” status with global business organisations like Siemens.

iv) MAKE OPPORTUNITIES WINNABLE: Provide a range of business development support and training to enable selected regional businesses to develop strategic plans including the formation of consortium / collaborative teams with other approved regional suppliers to successfully win and deliver contracts in global markets.

2. Introduction

Background:

2.1 This study was commissioned by the two primary partners, Hull City Council and East Riding of Yorkshire Council. At the time of contract award, in April 2011 the Local Enterprise Partnership (LEP) had not yet been secured and it was intended that part of the, then proposed LEP, that the results of the study and this report be shared with Scarborough Borough Council.

2.2 On 27th May 2011, the Pan Humber LEP was announced, with all four councils (Hull, East Riding, North and North East Lincolnshire) all in agreement that a pan – Humber LEP was the best way forward to boost the local economy.[3] As the study was already underway, it was agreed with the primary partners that the focus would remain within the original scope and would not include businesses within the North and North East Lincolnshire areas.

2.3 The study arises in order to identify Business Support Provision within the Hull and East Riding Region at a time when:

i) There are significant changes to how business support is delivered, due to the withdrawal of the Business Link consultation services on a regional and national level.

ii) Launch of nationwide Business Support Provision, due in 2012, will focus upon businesses identified as ' Gazelles', these are businesses with high growth potential, less than five years old and capable of 20% growth each year, over a three year period.[4]

iii) The emergence of unique opportunities within the Hull and East Riding of Yorkshire regions, due to the selection of the region for 'green' industry related manufacturing operations.

2.4 Kingston upon Hull is recognised nationally as a deprived area, ranking tenth, in a recent nationwide study of the most deprived areas in the UK. In contrast to the East Riding of Yorkshire which was ranked 202nd.[5]

2.5 This mixture of opportunity, changes to support provision and contrast of environments in which businesses operate within, required a study to determine practical and versatile approaches to Business Support Provision. Such provision is aimed at assisting businesses within the region to be able to take advantage of the emerging 'green' markets and in so doing, provide job creation opportunities and other key benefits to the regional economy.

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[3] Hull & Humber Chamber of Commerce Website. (27 May 2011.)
[4] Experian. *Insight Report.* (December 2010)
[5] Guardian Website. *Indices of Multiple Deprivation* (29 March 2011)

Opportunities :

2.6 The Humber region is finding itself in a unique situation as the introduction and development of manufacturing sites for renewable energy and other 'green' products offer to stimulate economic opportunities for regeneration and growth during the next decade. The opportunities are so significant that they were identified as a major part of the proposal for the Pan Humber LEP, sent to government, earlier this year.

'The Humber could become a European Centre for renewable energy, employing tens of thousands of people. The impact would be seen not only in new companies coming to the area, but also in existing local companies throughout the supply chain.'[6]

2.7 There are a number of 'green' projects which are looking to make the Humber their base:

i) Siemens have announced that they intend to build a wind turbine manufacturing and export facility at Hull's Alexandra's Dock Named Green Port, construction is due to start in the summer of 2012, with operations commencing in 2014. .

ii) A joint project between Alstrom, Drax Power Station and the National Grid has been announced to develop a transportation system to collect, transport and store carbon from it's base in Selby out to the storage system in the North Sea. It is anticipated that companies from the engineering and chemical sectors will have the opportunity to develop the skills, products and services required to construct, operate and maintain the network.[7]

iii) Sirius Minerals have been granted a license to mine Potash in the Whitby area for the next 40 to 50 years. It is anticipated that it will be two years before construction of the site is undertaken and it will take a further three years to build. The construction phase will create an opportunity for businesses within the supply chain, with further job creation, once full operations are underway.

2.8 There is the potential for these projects to provide opportunities for the growth of businesses through the Hull and East Riding of Yorkshire areas, including businesses supplying directly to the supply chain and through indirect opportunities, including hotels, leisure and sports facilities, transport and local amenities.

[6] Humber Local Enterprise Partnership. *A proposal to Government.* (2011)

[7] CO2Sense (2010) Yorkshire and the Humber : The natural location for Carbon Capture and Storage

Aims of the Study:

2.9 This study aims to identify the ideal business support system that will enable regional businesses to capitalise on the opportunities coming to the area. It is recognised that national Business Support Provision, under the 'Solutions for Business' umbrella will have a part to play in developing business growth within the region. However, it has also been determined that the region is in a unique position and may require a unique approach to Business Support in order to ensure that it is businesses in this area that have the greatest advantages from the opportunities that are emerging.

2.10 This report sets out the key findings from the research from the combination of the surveys and literature reviews completed in May and June 2011.

The main aims and objectives of the study were:

i) To identify the opportunities within the emerging markets for regional businesses.

ii) To identify what business support provision (BSP) will be needed by businesses in the East Riding of Yorkshire and Hull City regions to take advantage of the emerging 'Green Industry' growth opportunities in the Humber region beyond 2011.

iii) To identify the business support provision that will be available post 2011 and whether this will be sufficient to enable businesses within the region to grow as a result of specific emerging markets.

iv) To gauge business intentions, requirements and awareness of opportunities and obstacles to achieving future growth, including job creation.

v) To inform the RGF bid team (Round 2) of any gaps in the future BSP available to meet these needs, post 2011.

About the authors:

2.11 PAGE Consulting Ltd has provided a wide range of Business Support services to a broad range of sectors within the Yorkshire and Humber region for over seven years. Its experienced management team is committed to helping Business Owners and their management teams to accelerate the development and growth of their businesses.

2.12 PAGE Consulting Ltd is an ISO 9001 accredited Business Services provider, it is approved to deliver training and consultancy services on behalf of the Manufacturing Advisory Service MAS (Yorkshire & Humber), is included on the Business Link Yorkshire (BLY) suppliers register and the East Riding of Yorkshire Council standing consultants list. The company is very experienced in performing business evaluations and identifying key development needs and solutions for each business under-review. The Company understands the different needs of business as they progress through the evolutionary stages of growth, from pre-start to start-up, micro, small, medium and large size.

2.13 PAGE Consulting Ltd has strong links within the business community and is in a unique position to capture information from both business providers and regional businesses alike. It has experience working for large international blue chip businesses and understands the methods and techniques used in global supply chain development and the challenges facing local businesses wishing to access opportunities through such supply chains.

3. Approach

Methodology:

3.1 PAGE Consulting Ltd conducted three stages of research for this study: a review of literature, attendance of seminars and a qualitative research stage.

3.2 The literature review took two paths:

i) The first was to identify the requirements and opportunities of the emerging markets as primary access to these markets was restricted. First hand information was limited and as a result, many of the recommendations are based upon scenarios and benchmarking, using examples from past experiences, looking at other large scale manufacturers.

ii) The second path focused upon identifying surveys and reports which had been recently commissioned to evaluate support provision in the region, as it was anticipated that the number of responses to the qualitative survey would be restricted due to the short amount of time that the study had in order to complete the process.

3.3 The qualitative research was conducted to validate the information surfaced during the review and support and/or invalidate the scenarios put forward for development as part of the recommendation stage. The surveys were completed via a range of mediums including:

i) Telephone surveys

ii) Website surveys, available on both East Riding of Yorkshire and Hull City Council websites

iii) Face to face interviews

3.4 The surveys took place during June 2011 and aimed to achieve 90+ responses within this period. 128 responses were received. Questions were designed to investigate and probe business owners awareness, experience and plans for business development within three areas:

i) Previous business support provision experience

ii) Future plans for accessing and utilising business support provision

iii) Awareness of growth opportunities for own business

Selected survey questions were linked back to the IFF Research (2011) BIS Small Business Survey 2010, to enable comparison between regional data captured and the latest national statistics.

3.5 In addition, a separate survey was completed by selected business support providers to identify the type of business support provision available within the area, the popularity and whether the services offered were unique. The design of the survey was completed with cross links to the individual business survey.

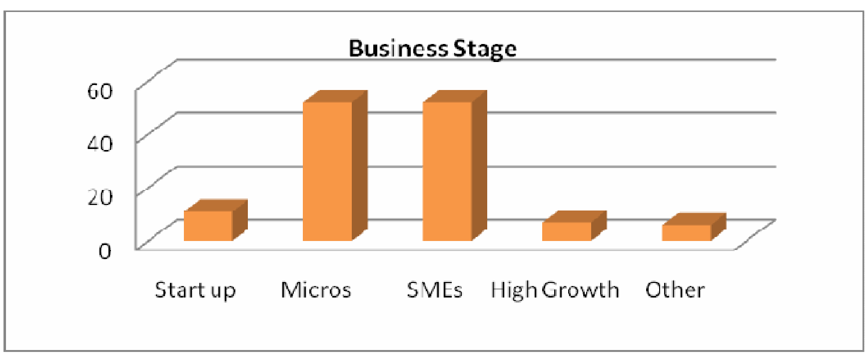
Profile of Businesses

3.6 Approximately 22,000 businesses operate within the Hull City Council and East Riding Council regions,[8] which make up the area of interest for this study.

3.7 All tables, graphs and data relating to information surfaced during the collection and analysis of data during the surveys includes information from all sources, including those surveys completed via the telephone, face to face and completed on –line, via the websites.

3.8 The table below shows the stage of the business lifecycle which each participant business classified themselves, as part of the survey:

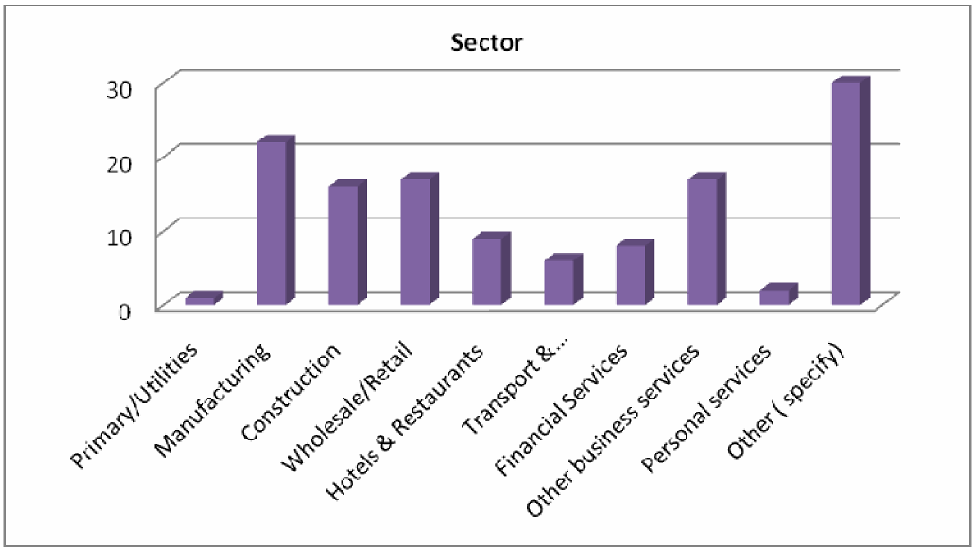
Q2: Where is your business in the lifecycle?	
Start up	11
Micros	52
SMEs	52
High Growth	7
Other	6



3.9 The council databases used to target businesses as part of the telephone surveys required some amount of updating, with numerous listed businesses no longer operating. The table below shows the sector distribution of those businesses that were contacted and did complete a survey.

8 ONS. UK Business (2009): Activity, Size and Location – 2009.

Q1: What is the nature of your organisation's offerings?	
Primary/Utilities	1
Manufacturing	22
Construction	16
Wholesale/Retail	17
Hotels & Restaurants	9
Transport & Communications	6
Financial Services	8
Other business services	17
Personal services	2
Other (specify)	30



3.10 Over 80% of businesses within the Yorkshire and Humber region employ ten or less people.[9] The natural proportion of responses to the survey supports this, as nearly 50% of all participant businesses employed between 1 – 4 people.

Number of employees		
1-4	60	47%
5-9	20	16%
10-24	27	21%
25-99	16	13%
100-249	2	2%
250+	3	2%

[9] ONS. UK Business (2009): Activity, Size and Location – 2009.

Data Collection

3.11 The study had three key areas of focus, a literature review, qualitative business surveys, utilising Hull City and East Riding Council business databases and the development of links with sub-regional renewable sector, through the attendance of meetings and seminars.

3.12 The literature review considered two areas in order to support the aims of the study.

i) The future projects offering growth potential, and the requirements of these projects, which would enable local businesses to take advantage of the opportunity to support local business growth.

ii) The evaluation of past Business Support Provision (BSP) through the review of relevant business surveys to identify lessons learnt and the availability of BSP in 2011 and beyond, through the identification of key providers, previous and anticipated usage.

3.13 The literature review was insufficient in providing the data required due to the relative uniqueness of the opportunities and the environment in which businesses within the area operate within. Therefore, the study raised questions designed to complement the findings of the literature review, to fill the data gaps, across a range of businesses on the north bank of the Humber.

3.14 The individual business survey collected information about the business itself, the experiences with past business support provision, plans for future business development, visibility for opportunities and barriers for growth and who they would approach for future business support provision.

3.15 In addition to the targeted telephone campaigns, using the East Riding and Hull City Council business databases, the attendance at events and website surveys, key membership institutions agreed to email surveys and web links to their member businesses to raise awareness, and increase the number of respondents. These included, Hull & Humber Chamber of Commerce, IOD, THMA and FSB.

3.16 A parallel survey was completed by a small number of business support providers, to identify the provision currently available within the area of interest to the study. The survey asked providers about the provider business itself, the provision offered, the types of businesses that the providers supported and the popularity of the provision. The design of this survey had cross links with the individual business survey to enable comparison within the analysis stage.

3.17 This survey team also had links with a related study activity which was investigating the Humber Sub-Regional Renewable Sector Skills and Training Requirements for 2011 and beyond. Whilst skills and training significantly overlap with business support provision, this study has attempted to avoid any direct duplication of the other study's investigations.

4. Findings

4.1 The study aimed to identify the Business Support Provision requirements for the Hull and East Riding area, post 2011, taking into consideration, the 'green' emerging opportunities, by asking a series of questions:

i) What are the emerging sector requirements for businesses within the area?

ii) What are the emerging sector opportunities for businesses within the area?

iii) What business support provision will businesses need in order to take advantage of the emerging sector and progressive growth opportunities?

What are the emerging sector requirements for businesses within the area?

4.2 The businesses proposing to build sites within the Hull and East Riding regions are large, corporate companies, in some cases (Siemens) with Global operations. The requirements of Siemens has been selected as the benchmark, a world class standard, ensuring that requirements of other companies, including Alstrom and Sirius are also being met.

4.3 Supplying directly to Siemens requires businesses to meet specific criteria, identified within Siemens Procurement Network process, labelled as ' Supplier Qualification.'[10] Described as a core element of the supplier selection process, it is adopted worldwide, by all Siemens Units, and is divided into three sections:

i) Section one determines whether the supplier complies with the minimum mandatory requirements, as described within the Code of Conduct for Siemens Suppliers. Core issues within the code of conduct include:

(a) environmental protection,

(b) health and safety of employees,

(c) legal compliance and prohibition of corruption and bribery

(d) respect for the basic human rights of employees

(e) prohibition of child labour

The system is based upon four components, including self assessment, external sustainability audits and buyer supplier quality audits.[11]

ii) Section two involves further self assessment and the provision of certificates to show compliance to relevant regulations and skill sets and qualifications. Individual risk profiles of

[10] Siemens. *Selling to Siemens.* (2008)

[11] Siemens. *Siemens at a glance.* (2011)

the businesses applying to become suppliers are created, adding to the application portfolio.

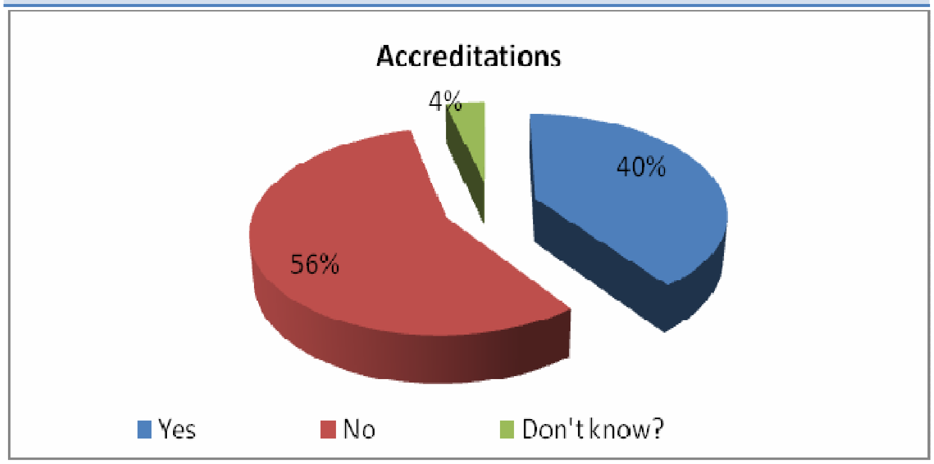
iii) The third section awards the business with a supplier qualification status to indicate their 'Ready for Business' status.[12] This section focuses upon the services or products which the applicant business wishes to supply. On site audits and product reviews take place to ensure that the business can deliver the products / services offered.

4.4 Should a business be successful and become a supplier to Siemens, they are subject to annual evaluations focusing upon sustainability and environmental responsibility, as part of their continued relationship with Siemens.

4.5 It is clear that businesses wishing to engage with large organisations, including Siemens, and others that may come to the area, must be able to evidence not only skills and expertise, but also have the internal processes and administrative systems in place to support and pass external audits, on a range of regulatory, industry and product specific compliance issues.

4.6 The results from the study showed that only 40% of those businesses surveyed had any accreditations, with 4% not knowing whether their business had accreditations, with the remaining 56% holding no accreditations at all.

Q5. Do you have any recognised accreditations?	
Yes	51
No	72
Don't know?	5



[12] Siemens. *Selling to Siemens* (2008)

4.7 In addition to the lack of accreditations, which would disqualify the majority of businesses from the first stages of the supply process, only 41% of businesses considered themselves strong at using formalised business systems.[13]

4.8 As Hull is identified as one of the lowest growth regions in the UK[14], it is vulnerable to outside of region businesses capturing the key contracts available in the emerging 'green' opportunities. Without the gap in the current Business Support Provision being addressed to support businesses to increase their ability to meet the requirements of Siemens, as the benchmark procurement process, it is unlikely that many businesses will be able to capitalise upon the opportunities which will be available within the region.

What are the emerging sector opportunities for businesses within the area?

4.9 The literature review, attendance of events and surveys have surfaced that there are a number of emerging markets within the area which will provide opportunities for businesses over the next two to five years. The scale of these opportunities and the impact that they can have upon regional economic growth are dependent upon a number of factors.

i) The ability and willingness of businesses to adapt their current operations and skills to meet the needs of the new market demands.

ii) The project and subsequent opportunities that the business is aiming to engage within.

The ability and willingness of businesses to adapt their current operations and skills to meet the needs of the new market demands:

4.10 Businesses within the Humber are not innovative. Only 37% of businesses in the Humber introduced new products or services within the last 12 months, which is significantly lower than the Yorkshire and Humber overall. (43%) By district, East Riding comes bottom of the table, with only 31% of businesses introducing new products or services.

4.11 By contrast, Hull is top of the table, by district. (43%)[15] However, overall, this figure is still relatively low, with less than half of businesses being innovative to their approach to their products, services and processes.

4.12 Lessons can be learnt through the evaluation of the transformation of the supply chain of Siemen's Spanish competitor's Gamesa. Their manufacturers had a background in mining vessel engines, railway components, electrical compliance components, glass fibre boats and the cement industry. The learning process from their initial business models, to approved suppliers of Gamesa, had to be

[13] IFF Research. *BIS. Small Business Survey 2010.* (April 2011)
[14] IFF Research. *BIS Annual Small Business Survey 2010.* (April 2011)
[15] BMG Research. *Yorkshire and Humber Business Survey* (2011)

rapid, to support the goals of Gamesa.[16] A willingness to take core skills and be innovative is an essential part in the meeting of the demands of the new markets. It is essential that businesses within the Humber region are prepared to do this.

4.13 Perhaps the lack of innovation, comes from businesses not being able to see the benefits of entering new markets, or having the visibility of opportunities which may be of economic value to their business. The results from the individual business surveys show that 41% of businesses see no opportunity for their business as a result of the emerging market. This does not mean that there is no opportunity, either primary, or secondary for these businesses, simply that they are not currently aware of any.

Q31: Does the wind farm, potash, or carbon capture markets open potential opportunities for your business?

	Start ups	Micros	SMEs	High Growth	Other	Total	%
Yes	5	25	18		1	49	38%
No	4	31	14	2	2	53	41%
Don't Know	2	8	10	5	1	26	20%

4.14 A further 20% do not know whether the emerging markets offer any opportunities for their business.

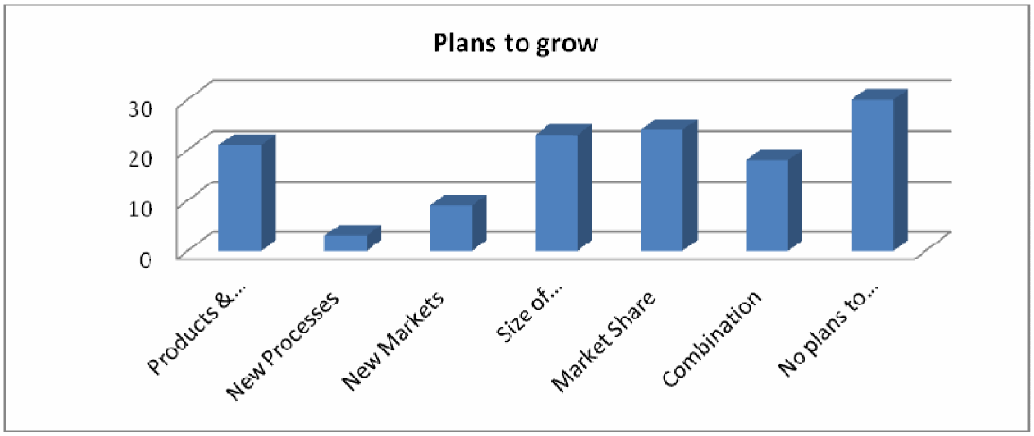
4.15 Of those businesses that did see an opportunity for growth, through the emerging markets, 19 % of respondents did not know what support they would require in order to take advantage of these opportunities. A further 19% stated that they would require financial grants or support to take advantage of any opportunity within the emerging markets.17% of respondents stated that they required knowledge of the tendering process of the emerging sectors.

4.16 The highest proportion of those surveyed stated that they had no plans to grow their business (23%), indicating that should opportunities be available they may not choose to capitalise upon them. However, of those that do have plans to grow their business, 24% intended to increase their market share, through the development of their client base, rather than entering new markets. This supports research published earlier this year which stated that only 26 % of businesses classified themselves as 'strong' at entering new markets. [17] This indicates that businesses do not currently have plans to expand their business through the exploration of new markets, and supports the view that they are not aware of the potential opportunities available to them, as a result of the emerging markets.

4.17 The second highest response came from those businesses which where intending on remaining within the same markets and same products, but increasing the size of contracts that they were able to win.

[16] Gamesa. *Supply Chain Event Presentation.* (February 2011)
[17] IFF Research. *BIS Annual Small Business Survey 2010.* (April 2011)

Q20. How do you plan to grow your business?	
Products & Services	21
New Processes	3
New Markets	9
Size of contracts	23
Market Share	24
Combination	18
No plans to grow	30

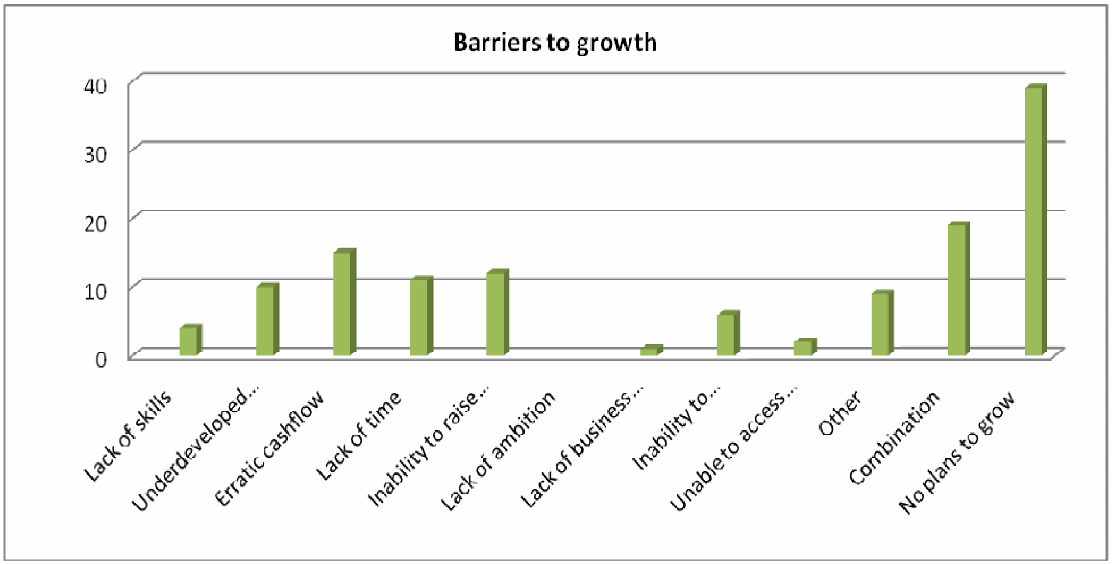


4.18 Achieving growth is not a certainty merely by planning it. National figures released in 2009, showed that nearly 70 percent of SME employers aimed to grow their business over a two to three year period, but only 20 % experienced growth.[18]

4.19 When asked what barriers they faced in achieving business growth, those businesses that had plans to grow, identified the following:

Q22. What barriers do you face in growing your business?	
Lack of skills	4
Underdeveloped systems and processes	10
Erratic cash flow	15
Lack of time	11
Inability to raise funds	12
Lack of ambition	
Lack of business knowledge	1
Inability to identify appropriate opportunities	6
Unable to access appropriate advice	2
Other	9
Combination	19
No plans to grow	39

[18] NESTA. *Measuring Business Growth: High Growth firms and their contribution to employment in the UK.* (2009)

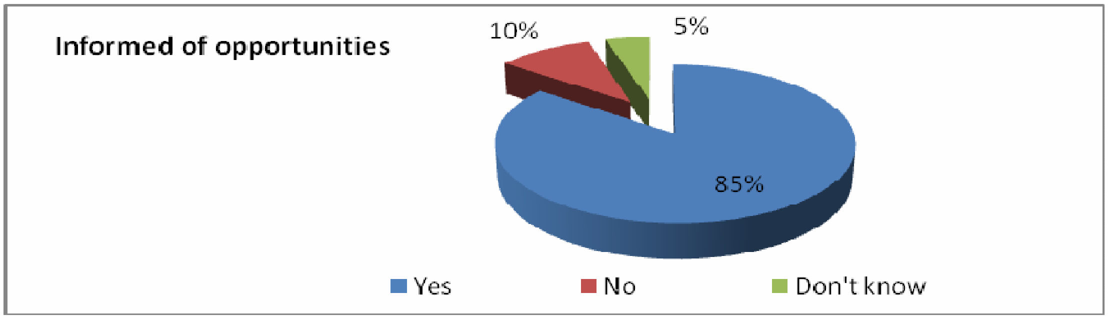


4.20 Of those businesses that do intend to grow over the next 12 months, 19% face a combination of barriers to growth, with many citing erratic cash flow, under developed systems and lack of time as factors which will impede growth.

4.21 A further 15 % identified erratic cash flow as a barrier to growth. 12% of those surveyed, that intend to grow, indicated that an inability to raise funds acts as a barrier to growth. An additional 11% of those businesses intending to grow identified a lack of time as a barrier to growth.

4.22 Labelled as the hidden barriers to growth, by PAGE Consulting Ltd, these barriers, identified through this survey and others, are often an accepted part of running and owning a business and can prevent businesses from realising their growth potential. Without intervention, these barriers will prevent businesses within the area from taking advantages from the opportunities which are emerging, as although they may be willing to respond to the challenges, they may not have the means, skills or time in order to do so.

Q23: Would you like to be informed of opportunities that your business may be able to benefit from?	
Yes	109
No	13
Don't know	6



4.23 85% of all businesses surveyed would like to be informed of opportunities that may benefit them.

4.24 77 % of these businesses would like to be informed of these opportunities via email, 7% via letter and 5% via newsletter.

The project and subsequent opportunities that are available to businesses within the region:

4.25 There are three projects which were highlighted within the original scope of this study, which have the potential to create economic growth within the region, but each on a different scale, within different timescales and in different locations:

i) Siemens' Off Shore Wind Manufacturing and Export Facility at Alexandra Docks.

ii) Alstom's Carbon Capture Project, based at Drax Power Station, Selby.

iii) Sirius Mineral's Potash Mining at Whitby.

4.26 The Green Port manufacturing site, at Hull's Alexandra's Dock, which will manufacture nacelles, and prepare Siemen's wind turbines ready for transportation to the site in the North Sea, has the potential to be the largest opportunity for businesses within the region of the three projects listed above.

4.27 Due to the unique location of Hull, with easy access to the 20 plus onshore and off shore wind energy projects in the area, including some of the largest offshore wind farms currently under development, it is anticipated that when Siemens commitment is confirmed that other leading turbine manufacturers like GE, Gamesa and Alstom will locate in the area. Dan McGrail, of Siemens has said of the project:

'This will be one of the biggest projects undertaken by Siemens in any one location.'

4.28 In February 2011, the Humber Gateway project was granted planning approval for 77 wind turbines five miles off Spurn point. The Humber Gateway Project will become the UK's largest offshore wind farm and will generate enough electricity to power 150,000 homes a year.

4.29 Proposals for the first phase of the Hornsea Offshore Wind Farm scheme, a joint venture between Mainstream Renewable Power and Siemens Project Ventures GmbH, are currently being unveiled through a series of public consultations. Project One, of this four phase development will include two wind farm blocks of 124 to 332 turbines and will provide enough electricity to meet around four per cent of all electricity demand in the UK.

4.30 Whilst it is anticipated that approximately 800 jobs will be created within the factory to manufacture the nacelles, the opportunities for businesses within the region will be dependant upon businesses abilities to meet Siemen's requirements, (in terms of industry specific skills, regulatory requirements, accreditations and Siemens own Worldwide Supplier, Code of Conduct) and Siemen's willingness to introduce local businesses to their established supply chain.

'Our procurement strategy is to have sustaining relationships with global best in class suppliers who support global and local demands'[19].

4.31 Consent and commercial agreement is expected to be in place in autumn 2011, with site construction to take place in 2012 – 2013, with plans for the Green Port site to become operational in 2014. Opportunities may be available for businesses within the construction and preparation phases, prior to manufacturing operations commencing. However, Siemens, as a global organisation will have existing accredited and approved international suppliers and may choose to select these to provide their goods and services, using only a small percentage from a local pool of businesses which are able to meet the 'Ready for Business' status.

4.32 Further opportunities may be available in specialist areas including:

i) Offshore fast response vessels
ii) Heavy lift offshore vessels
iii) Onshore steel structures
iv) Onshore civil design and civil works
v) Onshore directional drilling
vi) Paint, riggers, logistics, divers, crew, project managers, electrical engineers, technicians, lawyers, accountants and health & safety consultants.

4.33 Secondary opportunities may be available, which do not require direct interaction with the procurement process of Siemens, in the supply of goods and services to those that are employed by Siemens and their supply chain:

i) Accommodation – hotels, bed & breakfasts
ii) Leisure – pubs, gyms, cinemas, retail, clubs and restaurants
iii) Transport

[19] Siemens. *Windfarm Presentation.* (February 2011)

iv) House builders

v) Training providers

vi) Business service providers

vii) Personal service providers.

4.34 Yorkshire and the Humber has been chosen as the UK's first low carbon economic area for Carbon Capture and Storage (CCS) This sector will, according to the government, generate up to £6.5bn a year and sustain 100,000 jobs by 2030.[20] Ed Milliband, speaking in 2010, as the then, Energy and Climate Change Secretary said:

' CCS presents a massive growth opportunity for the UK. We have a strong, established and skilled workforce in precisely the sectors needed to get CCS deployed at scale. And we have some of the best potential sites in Europe for CO2 storage under the North Sea.'

4.35 Indeed, it is Alstom's joint venture with the National grid and Drax power station to capture carbon dioxide (CO_2) before it is released into the atmosphere and then safely transport it via deep geological formations to storage facilities under the North Sea.

4.36 CCS is a proven, technically viable and environmentally safe means of reducing green house gases. The network proposed to be based at the site at Selby, transporting CO_2, to the storage facility under the North Sea could reduce CO_2 emissions for the entire UK by 10%.[21]

4.37 The scale of opportunities for businesses within the region will potentially be less significant than those offered by the Siemens project, however estimates predict that supply of services and goods could include, within the construction and maintenance of the network:

i) Structural metal

ii) Fabricated metal

iii) Pumps, valves and compressors

iv) Electrical machinery

v) Civil engineering and construction

vi) Plant automation

4.38 In addition, to the opportunities which also may be available for the support of workers and employees, similar to those described for the Siemens project, it is anticipated that the operations phase could support 2,600 jobs per year.

[20] The Guardian. (March 2010)

[21] CO2Sense. Yorkshire. *A network to the future.*(2010)

4.39 The timescales for this opportunity, as with the Siemens project is short, with a need for businesses to gear themselves up to be prepared to engage with Alstom, meeting all supplier procurement requirements.

4.40 Sirius Minerals plc has been granted a license to open a Potash mine near Whitby, creating up to 5,000 jobs. Farmers use potash to replace potassium in soil to maintain good crop yields and strong harvests – a critical requirement, as we face growing global food demand and rising prices in the UK.

4.41 Large deposits of potash have been known to exist in North Yorkshire for many years and potash mining has been part of the area's way of life since the 1970's providing jobs for local people and boosting the local economy. If research and exploration confirms that there are further large deposits of potash in North Yorkshire then Sirius, who have recently bought the York Potash Project has the potential to help supply the potash needed in the UK, as well as export internationally, for the next 50 years or more.

4.42 The development of the mine would progress through three stages:

i) Exploration
ii) Construction and commissioning
iii) Full time operations

Each stage will require differing levels and intensity of activity, size of labour force, trade skills and technical expertise, each potentially, opening opportunities for businesses within the locality.

4.43 The fully operational mine would be anticipated to create 1,000 jobs.

4.44 Sirius has confirmed that they will adopt the highest standards of health and safety regulations and exemplary environmental stewardships throughout the lifetime of the project. It is a fair assumption, that they will expect the same of their suppliers.

What business support provision will businesses need in order to take advantage of the emerging sector and progressive growth opportunities?

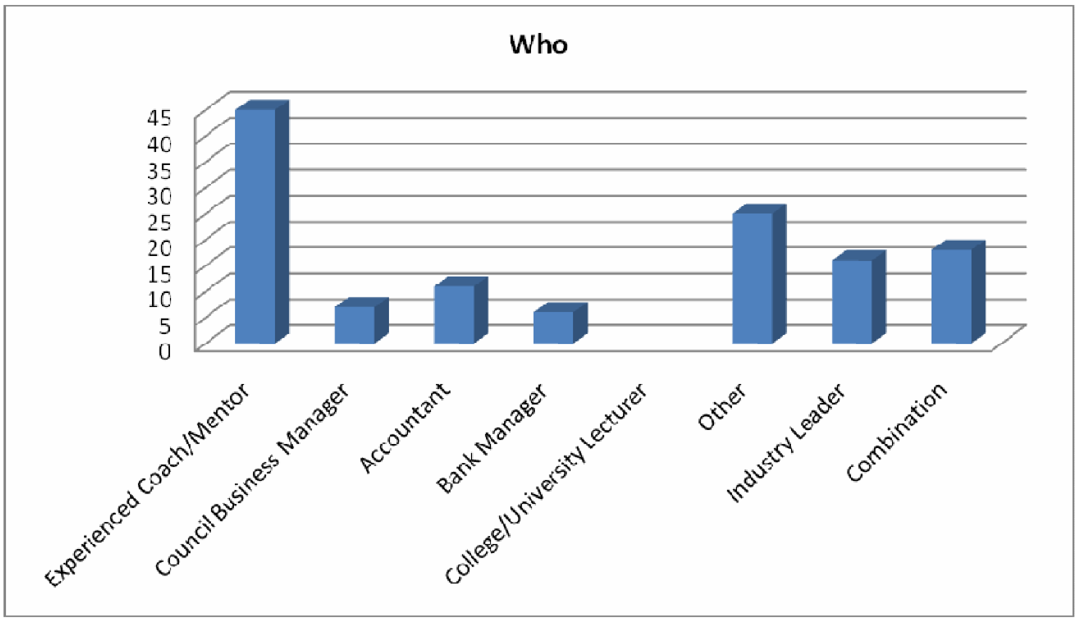
4.45 Many businesses do not know either what support they need, or what support is available to them. 45% of businesses would like to access government support but have difficulties in finding out what is available to them.[22] The loss of the Business Link brokerage service adds to this, with concern that businesses will not be able to engage with expert advice, as they will not know what support they need or who to trust. [23]

[22] IFF Research. *BIS. Small Business Survey 2010.* (April 2011)
[23] BIS website. *Research into business support's online and offline channels of delivery*. (November 2010)

4.46 Micro businesses were the most likely to struggle to determine what government support might be available, with 45% agreeing that this is the case, compared with 43% small businesses, and 38% of medium sized businesses. By sector, the construction companies face the greatest difficulties in finding out what support is available and appropriate. (51%)[24]

4.47 When asked who businesses think are best placed to offer support in order to help their businesses to grow, 35% believed that experienced coaches/mentors would be most effective.

Q27: Who do you think is best placed to provide you with support in order to grow your business?	
Experienced Coach/Mentor	45
Council Business Manager	7
Accountant	11
Bank Manager	6
College/University Lecturer	
Other	25
Industry Leader	16
Combination	18



4.48 Only 9% would approach an accountant for business support in order to grow their business. This is in contrast to the results of the BMG research, published in April 2011 that showed that 75% of businesses, within the Humber region, sought business advice from accountants. However, this study identified that this was business advice and did not differentiate general business advice, from business support in order to achieve growth.

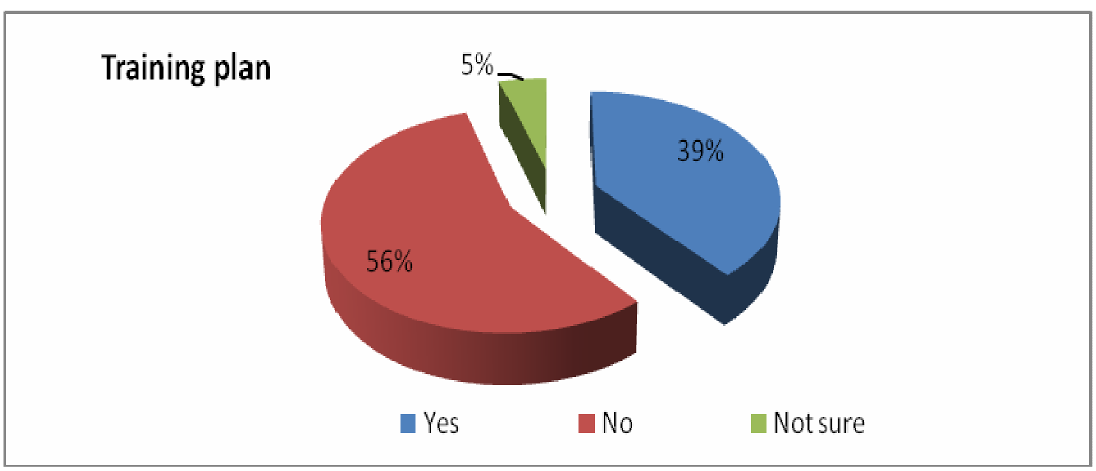
[24] IFF Research. *BIS. Small Business Survey 2010.* (April 2011)

4.49 The results from the surveys completed by the Business Support Provision Providers highlighted that the most popular provision, was also the coaching/mentoring support, in a joint position with marketing focused support, which concurs with the results of the individual business surveys, which also identifies a requirement to increase skills and knowledge of sales and marketing. (27%)

Q. 14. What provision is the most popular?

	Start ups	Micros	SMEs	High Growth	Other	Total
Business Planning	2	2	1			5
HR	1	1				2
Marketing	2	2	1	1		6
Coaching/Mentoring	2	2	1	1		6
Funding/Finance	2	2	1			5
Events & workshops	1	1	1	1		4
Networking opportunities	1	1	1	1		4
Opportunity to supply			1	1		2
Introductions			1	1		2
Meeting Facilitations			1	1		2
Recruitment	1	1	1			3
Employment law	1	1	1			3
Key statutory policies & processes	1	1	1			3

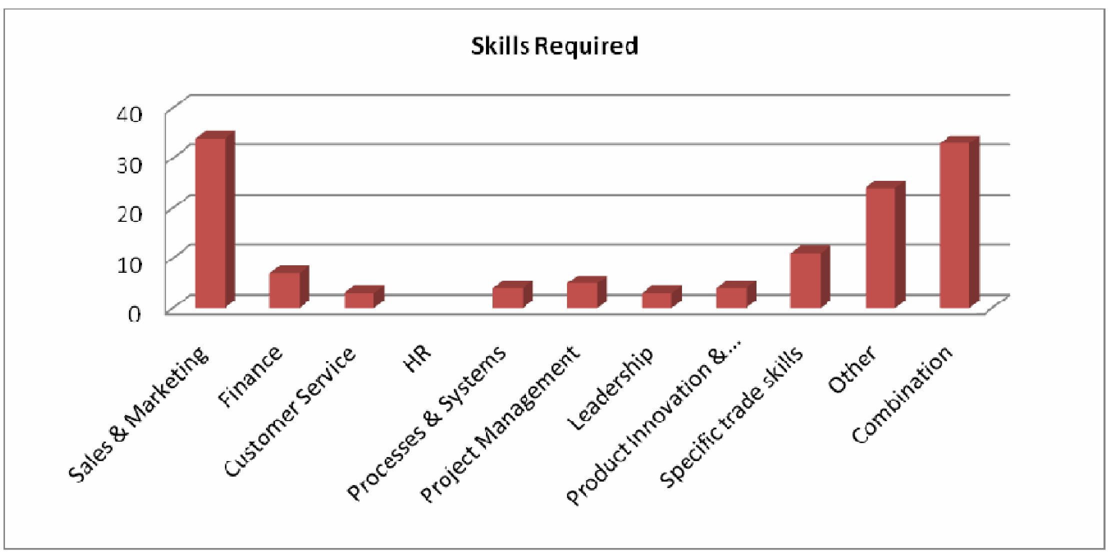
4.50 The development of skills will also play a key part in the preparation of businesses in the engagement with large supply chains. According to the BIS Small Business Survey published in April of this year, Yorkshire and the Humber is the least likely (48%) to arrange training and development for staff. The individual business survey identified that 56% of businesses have a training plan for the next 12 months.



4.51 With 27% of businesses believing that they have a requirement to increase their sales and marketing activities in order to grow their business. This substantiates the requirement identified to increase knowledge of the tendering process within the emerging opportunities sector, along with the results identified, where businesses identified that they intend to grow their business through the development of their business within markets that they already understand, rather than entering new markets.

4.52 A further 26% of those polled had a requirement to increase a combination of their core business skills, including sales and marketing.

Q30: What skills do you think you need to improve in order to grow your business?	
Sales & Marketing	34
Finance	7
Customer Service	3
HR	
Processes & Systems	4
Project Management	5
Leadership	3
Product Innovation & Research	4
Specific trade skills	11
Other	24
Combination	33



4.53 Of those businesses that had a training requirement, 23% believed that the Business Owner would benefit from training, in order for the business to grow. 18% would require those at a team level to receive training and a further 17% believed that a combination of all within the company could benefit from receiving training.

4.54 The study generated as a result of the individual business surveys and the literature reviews, a business support provision map, which identified the main BSP available to businesses, post 2011. The map below breaks the provision down, by services offered to businesses by the stage of lifecycle:

	Start Up	Micro	SME	High Growth	Large
Access to Finance	• New enterprise Allowance • Princes Trust ' will it work' • John Cracknel Youth Enterprise • Finance Yorkshire • PRIME Business • Goole Development Fund • Understanding Finance for Business	• Finance Yorkshire • Goole Development Fund • Understanding Finance for Business	• Finance Yorkshire • Goole Development Fund • UK Steel enterprise • Understanding Finance for Business	• Finance Yorkshire • Goole Development Fund • Understanding Finance for Business	• Finance Yorkshire
Business Development	• Knowledge Transfer Partnership	• Manufacturing Advisory Service (MAS- YH) • Knowledge Transfer Partnership	• Manufacturing Advisory Service (MAS- YH) • Knowledge Transfer Partnership	• High Growth Coaching • Manufacturing Advisory Service (MAS- YH) • Knowledge Transfer Partnership	
Marketing	• Designing Demand	• Designing Demand	• Designing Demand	• Designing Demand	
New Product Development	• Networking for innovation • Collaborative Research & Development	• Networking for innovation • Collaborative Research & Development	• Networking for innovation • Collaborative Research & Development	• Networking for innovation • Collaborative Research & Development	
Skills Training	• Apprenticeships • ESF supported training	• Apprenticeships • ESF supported training	• Apprenticeships • ESF supported training	• Apprenticeships • ESF supported training	• Apprenticeships • ESF supported training
Environmental	• Improving your resource efficiency	• Improving your resource efficiency	• Improving your resource efficiency	• Improving your resource efficiency	• Improving your resource efficiency

4.55 Start up businesses and those with high growth potential are the focus of the coalition government's plans for future business growth, on a nationwide scale. These types of businesses may not be those that could benefit from the opportunities that are arising within the Humber region, as a result of the emerging 'green' projects and as a result, further business support provision is required in order to ensure that the opportunity can be capitalised by all appropriate businesses within the area.

5. Recommendations

5.1 It is clear that businesses within the region must have a business support provision programme in place, designed to prepare them for the unique opportunities which are emerging. Due to the business environment and culture in which these companies operate within, currently, very few businesses, without support would be able to capitalise upon these opportunities.

5.2 The planned nationwide government funded 'Solutions for Business' programmes, do not provide the depth or rapid response that is required to fully prepare businesses within this area, thereby opening the door for out of region businesses to enter the market and benefit from these extra ordinary projects.

5.3 It is recommended that an intervention package is made available, that compliments national programmes, once they come on line, in 2012. The proposal, includes four stages, which are designed to ensure that businesses are able to trade within the supply chains, if not with the primary project companies themselves.

i) Business Growth Enabler.

ii) Visibility of Opportunities.

iii) Accessibility of Opportunities.

iv) Winning Opportunities.

Business Growth Enabler.

5.4 There is a need to support businesses to overcome a reluctance and/or inability to respond to opportunities and grow. It is recommended that the first phase of the intervention would involve 1:1 coaching, with the introduction of business vision and planning, improvement of leadership and management skills with a review of the business, to identify signs of business stagnation.

5.5 An individual intervention can be designed as a result of this health check, designed to remove the hidden barriers to growth, which will be different to each business and may involve culture and confidence change initiatives.

Visibility of Opportunities.

5.6 Businesses need to be aware of opportunities in good time to be able to fully prepare and be ' ready for business'.

5.7 Focus will be placed upon opportunities including identifying whether opportunities can be applicable if businesses can identify partners or collaborative arrangements, meet the buyer events and development of options and scenarios across the supply chain tiers.

Accessibility of Opportunities.

5.8 The development of business processes and management systems to ensure that they can reach the appropriate accreditation and/or regulatory status to gain entry onto the best practice supply chains, including Siemens. This can be a time consuming and expensive process and requires a comprehensive range of changes to business capability, including the introduction of advanced business performance monitoring and improvement systems such as 'Lean' and/or '6 Sigma' techniques.

5.9 Specific needs will involve the focus upon the development of own supply chain management, internal management systems, E tendering and E Commerce and the development of specific pre-qualification questionnaire (PQQ) parameters.

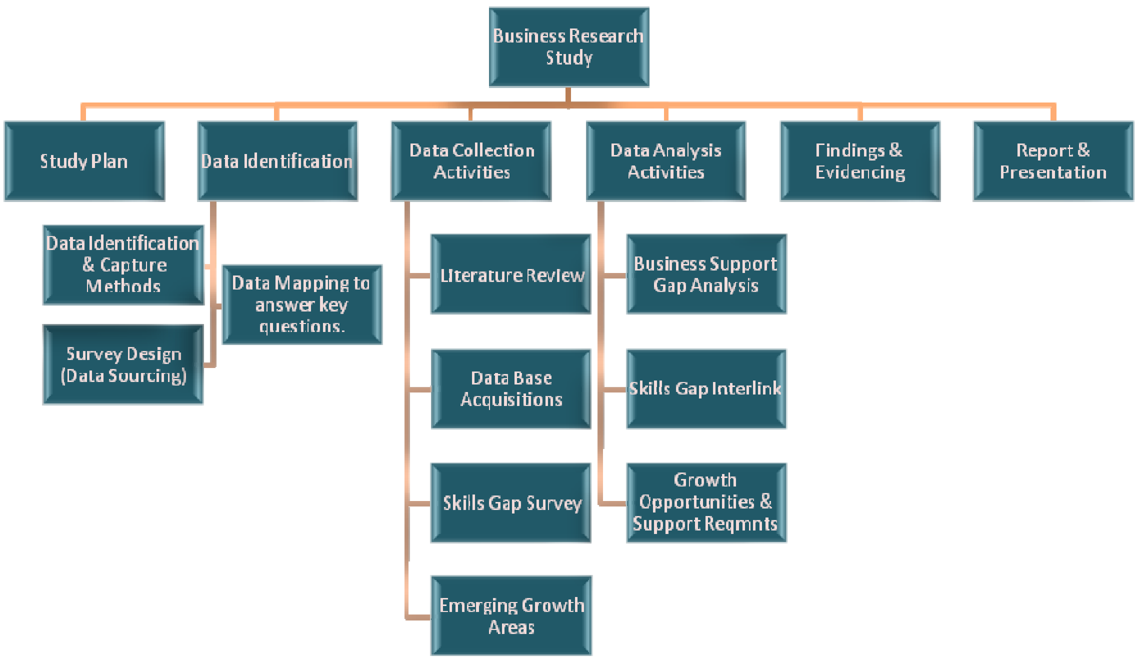
Winning Opportunities.

5.10 Supporting businesses to improve their skills to win contracts, through the development of sales and marketing capabilities, presentation and bid writing development, collaboration and consortium development and customer face to face interactions.

5.11 It is equally important that once a contract has been won that the business is able to deliver the contract to secure further, future work, and maintain the approved supplier status. It is therefore proposed, that project management training is also delivered to support businesses continue to develop and grow.

Appendices

Work Breakdown Structure:



Individual Business Survey: Completed by Telephone and Face to Face Interview and available on Hull City Council and East Riding of Yorkshire Council Websites:

Administration:

A1. Name of Interviewer

A2. Date

A3. Organisation

A4a. Name of person being interviewed

A4b.Position within organisation

A5. How many people does your organisation employ?

A6. What is the organisation's annual turnover?

A7. Where is your primary business processes located?

Questions about your business: please enter the letter of the answer that is most appropriate in the box below each question.

Q1: What is the nature of your organisation's offerings?

a) Primary/utilities
b) Manufacturing
c) Construction
d) Wholesale/retail
e) Hotels and restaurants
f) Transport and communications
g) Financial services
h) Other business services
i) Personal services
j) Other (please specify)

Q2: Where is your business in the lifecycle?

a) Start up (less than 12 months)
b) Micros (less than 5 employees)
c) SMEs (more than 10, less than 250 employees)
d) High Growth Potential (growth at a rate of 20% every year over next 3 yrs)
e) Other (please specify)

Q3: What was the reason for starting the business?

a) Unemployment/redundancy
b) Opportunity
c) Family business
d) Other (please specify)

Q4: What has been the primary objective of the business over the past 12 months?

a) Surviving
b) Consolidating
c) Developing and growing
d) Raising finance
e) Staffing and skills
f) Dealing with regulations and compliance
g) Other (please specify)

Q5: Do you have recognised accreditations? ISO 9001:2008, CHAS, etc

a) Yes (please specify)
b) No
c) Don't know

Q6: Do you offer your services nationwide

a) Yes, but the main focus is within the local area
b) Yes, we operate on a nationwide scale
c) Yes, we operate nationally and internationally
d) No, we are a local business
e) Don't know

Questions about business advice you may have accessed:

Q7: Have you accessed business support and advice from an independent source (ie, other than family member or friend)?

a) Yes (please specify)
b) No

N1: If answer No, please skip to Q19

Q8: What was the primary reason for looking for business support and advice?

a) Searching for grants/funding
b) Training and skills development was required
c) Development to the business was required to support growth
d) Business was in crisis
e) Advice was required in an area outside of business experience
f) Other (please specify)

Q9: How did you learn about the business support provider?

a) Recommendations
b) Media (TV/newspaper/adverts)
c) Networking
d) Other (please specify)

Q10: Which organisation did you use for business support and advice?

a) Business Link
b) Local council
c) Network organisations
d) Coach/mentor
e) College/university
f) Accountant
g) Bank
h) Job centre
i) Chamber of commerce
j) FSB (Federation of Small Businesses)
k) IOD (Institute of Directors)
l) Enterprise Agency
m) Other (please specify)

Q11: How was the support delivered?

a) Telephone
b) Online
c) Group workshops
d) One to one
e) Site visits by experts
f) Other (please specify)

Q12: Was funding available to enable you to access the support and advice?

a) Yes (please specify)
b) No
c) Don't know

Q13: How much did you pay for the support, per provision?

a) £0-£9
b) £10-£99
c) £100-£999
d) £1,000-£9,999
e) £10,000-£99,999

Q14: How often, on average did you access your support provision?

a) Daily
b) More than twice a week
c) Once a week
d) Once every two weeks
e) Once a month
f) Every two months
g) Every six months
h) Once a year
i) Don't know

Q15: Was the support offered designed to safeguard, and/or create jobs?

a) Yes, create jobs
b) Yes, safeguard jobs
c) Yes, both
d) No
e) Too early to say
f) Don't know

Q16: What was the focus of the support that you received?

a) To improve quality
b) To improve customer service
c) To improve efficiency
d) To increase turnover
e) To increase profit
f) New product development
g) To increase market share
h) To enter a new market
i) General business development
j) Other (please specify)

Q17: Would you say that the support you received had a positive effect upon your business?

a) Yes, more than expected
b) Yes, to the level that was expected
c) No, although some benefits were gained
d) No, not at all
e) Other (please specify)

Q18: Were there any barriers you experienced in accessing the provision, or reaping the benefits anticipated?

a) Unable to release staff to fulfil the activities
b) Cost
c) Poor delivery
d) Poor product/service
e) Other (please specify)

Questions about future business advice you may require:

Q19: Do you have plans to grow your business within the next 12 to 18 months?

a) Yes
b) No
c) Not sure

N2: If answer No, please skip to Q23

Q20: How do you plan to grow your business?

a) Development of new products/services
b) Development of new processes
c) Entry into new markets
d) Increase the size of contracts/orders
e) Increase market share

Q21: In order to grow and develop your business, which organisation may you consider approaching for support and advice?

a) Business Link (website only will be available post 2011)
b) Local council
c) Network organisations
d) Coach/mentor
e) College/university
f) Accountant
g) Bank
h) Job centre
i) Chamber of commerce
j) FSB (Federation of Small Businesses)
k) IOD (Institute of Directors)
l) Enterprise Agency
m) Other (please specify)

Q22: What barriers do you face in growing your business?

a) Lack of skills
b) Underdeveloped systems and processes
c) Erratic cash flow
d) Lack of time
e) Inability to raise funds
f) Lack of ambition
g) Lack of business knowledge
h) Inability to identify appropriate opportunities
i) Unable to access appropriate advice

Q23: Would you like to be informed of opportunities that your business may be able to benefit from?

a) Yes
b) No
c) Don't know

Q24: How would you like to be informed?

a) Email
b) Newsletter
c) Telephone
d) Letter
e) Other (please specify)

Q25: How much would you be prepared to pay, over the period of a year, for business support that enabled significant business growth ?

a) I wouldn't be prepared to pay
b) Up to £500
c) Up to £1,000
d) Up to £3,000
e) Up to £5,000
f) Up to £10,000
g) Up to £25,000
h) Other (specify)

Q26: How would you like the support to be accessible?

a) Via the internet
b) Face to face
c) Telephone
d) Workshops
e) Other (please specify)

Q27: Who do you think is best placed to provide you with support in order to grow your business?

a) Experienced Coach/Mentor
b) Council Business Manager
c) Accountant
d) Bank Manager
e) College/ University Lecturer
f) Industry Leader
g) Other (please specify)

Q28: Do you have a training plan for the next 12 months?

a) Yes
b) No
c) Not sure

Q29: Who in your business do you think would benefit the most from receiving training?

a) Business Owner
b) Senior Management team
c) Management
d) Supervisors
e) Team level
f) Other (please specify)

Q30: What skills do you think you need to improve in order to grow your business?

a) Sales and marketing
b) Finance
c) Customer service
d) HR
e) Processes and systems
f) Project Management
g) Leadership
h) Product Innovation and Research
i) Specific trade skills
j) Other (please specify)

Q31: Does the wind farm, potash, or carbon capture markets open potential opportunities for your business?

a) Yes (please specify)
b) No
c) Don't know

Q32: What support would you need in order to take advantage of these emerging markets?

Q33: What support would you need in order to take advantage of any opportunities, including the winning of national and international contracts?

Business Provider Survey: Completed by Telephone and Face to Face Interview.

Administration:

A1. Name of Interviewer

A2. Date

A3. Organisation

A4a. Name of person being interviewed A4b.Position within organisation

A5. How many people does your organisation employ?

A6. What is the organisation's annual turnover?

Section One:

Q1: What is the nature of the support that you provide?

a) Factual
b) Basic
c) In depth discussion
d) Long term discussion
e) Training
f) Consultancy
g) Signposting
h) Networking
i) Something else (specify)

Q2: What are the typical types of businesses that you support?

a) Start ups
b) Micros
c) SMEs
d) High Growth Potential
e) Other (specify)

Q3: How is the support delivered?

a) Telephone
b) Online
c) Group workshops
d) One to one
e) Site visits by experts
f) Other (specify)

Q4: Is there a pre-requisite requirement in order to access your support?

a) Yes, an annual membership fee
b) Yes, an annual membership fee and be within a relevant industry/sector
c) Yes, an annual membership fee and commit to attend a minimum number of events
d) Yes, commit to attend a minimum number of events
e) Yes, be within a relevant industry/sector
f) No,
g) Yes, Other (specify)

Q4a: Is funding available to enable businesses to access your support?

a) Yes, via solutions for business
b) Yes, via ERDF
c) Yes, via ESF
d) Yes, via other
e) No
f) Don't know

Q4b: How much does a business pay for the support, per provision?

a) £0-£9
b) £10-£99
c) £100-£999
d) £1,000-£9,999
e) £10,000-£99,999

Q5: How do businesses learn about your business support provision?

a) Business link referrals
b) Direct mailing campaigns
c) Recommendations
d) Media
e) Networking
f) Other (specify)

Q6: Is the support offered designed to safeguard, and/or create jobs?

a) Yes, create jobs
b) Yes, safeguard jobs
c) Yes, both
d) No
e) Too early to say
f) Don't know

Q7: How long has your organisation been operating?

a) Less than 3 months
b) 3-9 months
c) 9-12 months
d) 12-18 months
e) 18 months to two years
f) Two years to five years
g) Five to ten years
h) Ten years plus

Q8a: Do you have any plans to add to your provision in the future?

a) Yes, in response to the closure of Business Link Yorkshire
b) Yes, in response to the opportunities in the renewables sector
c) Yes, in response to demand from users
d) Yes, in response to government policy
e) No
f) Don't know

Q8b: What are these plans?

Q9: To what extent would you agree , or disagree with the following statement, ' the support offered is something that cannot be accessed via another source, within this region'

a) Strongly agree
b) Slightly agree
c) Neither agree, or disagree
d) Slightly disagree
e) Strongly disagree
f) Don't know

Q10: How often, on average do businesses access your support provision?

a) Daily
b) More than twice a week
c) Once a week
d) Once every two weeks
e) Once a month
f) Every two months
g) Every six months
h) Once a year
i) Don't know

Q11: How much time is involved in providing each business with the support provision?

a) Less than one hour
b) 1-2 hours
c) 2-5 hours
d) 5-10 hours
e) 10-25 hours
f) 25-50 hours
g) 50-100 hours
h) More (specify)

Q12: Are specialist skills required in order to deliver the business support provision?

a) Yes (specify)
b) No

N1: If respondent answers NO, skip to Q14. If YES, please ask them to specify below:

Q13: How is the performance of the provision measured?

Q14: What provisions are the most popular, to whom and why?