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Client	Project
<p data-bbox="177 255 416 322">UK Ordnance Survey</p> <p data-bbox="177 344 416 479">Sector Analysis, Market Analysis & Commercial Strategy</p>	<p data-bbox="416 255 1430 293">Mapping Geo- Services and Commercialising UK mapping knowledge base</p> <p data-bbox="416 315 1430 479">The Ordnance Survey (OS) is the UK's national mapping agency, providing a wide range of map and data products and services, with a turnover of £150m. Geo-services (or Location- Based Services) is a rapidly expanding and changing global marketplace with emerging competition from all of the major internet companies. kMatrix was commissioned to:</p> <ul data-bbox="416 501 1430 725" style="list-style-type: none"> • Map Global Geo-service/ Location- Based Markets • Position UK Performance within a Global context • Position OS within UK Markets • Position OS in relation to Global market opportunity • Map Impact of Geo-services/ OS on UK Economy • Develop key messages for external stakeholders • Internalise market data for OS exploitation. <p data-bbox="416 748 1430 837">The project identified 10,000 service markets for Geo- services, with a 2013 UK market worth £2.2bn, across end-users that include government, health, industry, academia, retail, leisure, emergency services, environment and climate change.</p> <p data-bbox="416 860 1430 994">The project delivered a published report and an updateable global market data set with an analytical toolkit that will be used by the Market Insights and Strategy Development teams to inform marketing objectives during the 2015 business planning cycle and beyond.</p>
<p data-bbox="177 1025 416 1093">UK College of Policing</p> <p data-bbox="177 1115 416 1218">Market Analysis & Commercial Strategy</p>	<p data-bbox="416 1025 1430 1064">Commercialising the UK Law & Order knowledge base</p> <p data-bbox="416 1086 1430 1308">The newly formed College of Policing provides the knowledge, training, research, tools and consultancy required to deliver the UK Law & Order agenda. It commissioned kMatrix to conduct research into international markets for its IP and services, to qualify and prioritise those markets in relation to the College's current resources and to generate commercial scenarios that would enable the College to achieve £30m revenues by 2015. This level of revenues would reduce public funding to less than 50% of turnover and enhance its level of operational freedom.</p> <p data-bbox="416 1330 1430 1554">The research involved working closely with the IP holders and service deliverers in the College, talking to customers and stakeholders and also interviewing prospective customers/ partners. The market research included markets by country for over 500 products/ services across 20 priority countries. The scenarios incorporated a range of options including international sales, developing membership services, new e-learning delivery and new cyber security training/ standards and consulting.</p> <p data-bbox="416 1576 1430 1733">The preferred scenario formed the basis for a new commercialisation strategy for 2014 against which substantial new recruitment for commercial and business development functions has now been completed. kMatrix will continue to provide updated market intelligence to the newly formed teams as they enter into the pilot phase of the new strategy and new organisational structure.</p>
<p data-bbox="177 1765 416 1921">UK Centre for Environment, Fisheries & Aquaculture Science</p> <p data-bbox="177 1944 416 1980">Market Analysis</p>	<p data-bbox="416 1765 1430 1803">Commercialising the UK Marine Environment science base</p> <p data-bbox="416 1825 1430 1980">The Centre for Environment, Fisheries and Aquaculture Science (Cefas) is a funded agency of the Department of Environment, Food & Rural Affairs (Defra). It has a history of delivering some commercial revenues, but is due to receive reduced government funding and is required to identify new commercial revenues of tens of millions over 3-5 years to offset this reduction. kMatrix was</p>

<p>& Commercial Strategy</p>	<p>commissioned to conduct detailed market research and develop commercial scenarios that would re-evaluate the status and business model for Cefas.</p> <p>The research involved working closely with the science teams and service deliverers in Cefas, talking to customers and stakeholders and also interviewing prospective customers/ partners. The market research included markets by country for over 2,000 marine science products/ services across 50 countries. It also included an analysis of market share and of key competitors in each UK market. The commercial scenarios incorporated a range of options including increased domestic sales, international sales, developing new standards and due diligence services.</p> <p>The preferred scenario forms the basis for a new commercialisation strategy which includes options for organic growth, new investments in business development and engaging with commercial partners. The political/ commercial implications and resource requirements for the strategy are currently being reviewed by the stakeholders as part of the 2015 business planning process.</p>
<p>Fugro</p> <p>Market Analysis informing Market Strategy</p>	<p>Corporate analysis of global Marine Environment Markets</p> <p>Fugro UK is part of the world's largest integrated supplier of survey, and geotechnical related services and is a major player in some global marine environment markets. kMatrix was commissioned to analyse global marine environment markets and identified £8bn of new opportunities of interest to Fugro.</p> <p>Product and service markets (15 sub sectors and 550 market activities) were quantified by country (17) and by geographic region (6) for market size, historical and forecast growth. For each country the major competitors were identified and ranked.</p> <p>The research has been incorporated into the 2015 corporate strategic process for evaluating new global market development and has enabled Fugro to prioritise specific markets for more in-depth and in-country research.</p>
<p>Covalent LLP</p> <p>Market Analysis leading to Commercial Spin-out and Licensing of IP</p>	<p>Commercialising new privately funded Nanotechnology applications</p> <p>Covalent is a nanotechnology laboratory in the USA with private equity funding from the UK. It has a pipeline of nano- filter applications, the most developed of which are water filtration, desalination, blood filtration, self-aligning photovoltaic cells and new electric battery filters. kMatrix was approached by Viscount Portman in 2008 to provide a range of commercialisation services to this (and other) investments and has been retained ever since.</p> <p>Services involve providing market research that quantifies and prioritises the opportunities in the pipeline, conducting in-house market/ technical due diligence, building the investment case for each technology application and then actively seeking investment, building an investment club and finding customers/ partners that will spin out or license each application.</p> <p>The pipeline currently sits at 200 applications, with initial investment activity around the top five applications and blue chip partnering discussions around others. The first spin out company is Agua Via for water treatment/ desalination with secured funding of £20m (rising to £60m).</p>
<p>UK Space Agency, BIS, Met Office & UK Industry</p>	<p>The business case for UK Earth Observation and Satellite investment</p> <p>We have conducted two research projects for Satellite Earth Observation markets. The first was commissioned by the Carbon Trust in 2009/ 10 to measure Carbon</p>

<p>Satellite Earth Observation Markets and Business Case for Investment</p>	<p>Intelligence markets for satellite-derived geo-information on behalf of a UCL spin out company called Carbon Auditors (now Rezatech). As a result of this work-creating a new market definition and new source of global market intelligence- we were commissioned by UK Space, NERC, Met Office and the Space Industry in 2010/ 11 to conduct similar research into commercial markets for Weather and Climate Services. The work was to focus on all global communication/ data transmission platforms- land, sea, air and satellite- based.</p> <p>This work involved the creation and population of a new sector definition, including details on over 3000 service markets, that defied measurement using SIC codes or any other research sources. Markets were defined by service, by data platform (air, space, land or sea) and by end user industry. The research identified a market of £26.6bn for 2010/11 with annual growth rising from 6.6% to 7.8% by 2014/15. This research contributed to the Space Catapult business case and was recently published as part of the new Space sector strategy.</p> <p>UK businesses worked closely with the data sources and used it to investigate new service opportunities and to develop new products and market channels. New services have now been developed by each of the leading industry partners.</p>
<p>UK Natural Environment Research Council</p> <p>Market Analysis & Commercial Strategy</p>	<p>Commercialising the UK Environmental science base</p> <p>The Natural Environment Research Council (NERC) is one of the seven UK Research Councils that funds, commissions and conducts research of national significance. Our initial engagement was to conduct quantitative research into the global water industry as part of a UK Industry initiative. This engagement extended to a commission to identify and evaluate commercial markets for NERC hydrology, ecology and geology IP and services as, it was required to respond to a commercial imperative to generate new revenue streams.</p> <p>This commission resulted in unique global market intelligence about research, data analysis, data modelling and consulting service opportunities in the water industry, specifically around insurance, re-insurance, disaster management and surface/ groundwater engineering markets. The research identified existing players, channels to market (licensing opportunities), market gaps and end-user industries and specific clients. The research validated existing market assumptions and uncovered a wider range of opportunities for "bundled" services and for joint venture exploitation (where the service requirement extended beyond existing experience and skill sets).</p>
<p>Met Office/ Logica</p> <p>Market analysis for new product and service development</p>	<p>We were able to assist both the Met Office and Logica plc with unique data on intermediate markets for research, data and consultancy relating to weather and climate services. The initial research had been used by Government to make the case for significant investment into the UK Space sector (and has been published as part of the UK Space strategy), but a secondary purpose of the research was to identify achievable market opportunities for both public and private sector organisations in the UK.</p> <p>As a result of identifying global purchasers and suppliers, channels to market, average transaction size, volume of transactions and purchasing intent, we helped both organisations to investigate and then validate new service offerings. This work was particularly important to the Met Office because it scoped a whole intermediary market (filled by consultancies) that had developed as a result of freely available satellite data (including its own). The Met Office is now able to enter that intermediate market with its own services and also generate new licensing revenues from the data it accumulates.</p>

<p>QinetiQ</p> <p>Market Analysis & Commercial Strategy</p>	<p>QinetiQ, or Dera as it was then, was the UK national defence research agency and was at the very beginning of its journey to commercialisation and then to privatisation. We worked with six directorates (the largest of which were Space, Communications and Battlefield Technologies) and our role was three-fold:</p> <ul style="list-style-type: none"> • to evaluate the commercial potential of existing research and the IP portfolio • to identify successful commercial models and processes appropriate to each directorate and its technology portfolio, and • to advise on organisational roles and structures that reflected the new commercial imperative. <p>The research provided a strong market evidence base to inform commercial decision making, enabling QinetiQ to prioritise global business development opportunities both within and between directorates.</p> <p>In the course of this research/ consultancy we reviewed a large number of "cases", from defence or others sectors, where a similar transition to commercial research had been achieved, identifying and learning from best practice examples as new structures and business processes were introduced.</p>
<p>New Zealand Post</p> <p>Market Analysis & Commercial Strategy</p>	<p>Market Analysis for Logistics Services as part of Commercial Strategy</p> <p>New Zealand Post is following a similar commercialisation/ privatisation path to the Royal Mail, albeit starting 10 years later. This is a longer term (four year) strategic engagement that has started with the detailed analysis and validation of new market opportunities for logistics/ fulfilment services for different sectors (healthcare, pharmaceuticals, agritech etc), different niches (local, high volume national, high volume international, modular, multi service etc) and different country destinations across Asia Pacific.</p> <p>The engagement has now extended from a research to a consulting relationship that involves the creation of a bespoke commercial methodology, philosophy and language that can be adopted as part of the corporate culture change process. This is a transitional step before wholesale changes in roles, structures, processes and recruitment are formally identified and introduced.</p> <p>We are still at an early stage in this journey, but there is enough evidence from this project already to demonstrate our understanding and experience of all aspects of the commercialisation change process, our credibility in a complex corporate environment and the highly pragmatic and practical requirement to be able to evidence new and previously un-scoped markets.</p>
<p>New Zealand Government and Trade & Enterprise (NZTE)</p> <p>Titanium Cluster Development</p>	<p>The national case for investing in Advanced Materials</p> <p>We conducted a tri-partite research project on titanium as an advanced material for New Zealand government agencies including Trade & Enterprise, Academia and Central Government. With a local partner to provide access to local businesses we:</p> <ul style="list-style-type: none"> • Evaluated the global markets for titanium powders • Conducted technical due diligence on the new NZ- based titanium production process • Modelled the potential for developing a new industrial cluster and supply chain • Mapped and modelled the skills profile • Built the business case for government investment, and • Delivered the business plan. <p>This process involved us working both directly and indirectly with government</p>

	<p>departments, IP owners, university research departments, industry bodies and companies and resulted in a detailed economic and operational model for building advanced manufacturing capability (cluster and supply chain) in response to global markets for new titanium products in a wide variety of industrial sectors (including Healthcare, Marine, Aerospace, Environment and Construction). A number of localized projects have since been instigated and we have gained interest from Rolls Royce as a potential OEM for the early stages of a smart finance supply chain in New Zealand for the production of certain titanium grade components. Development is ongoing.</p> <p>As a result of this work we are still involved with the titanium initiative and we are working with Callahan Innovation in New Zealand to promote evidence- based commercialisation in food and beverage manufacturing, agri-tech, digital technologies, health technologies and therapeutics.</p>
<p>UK Business, Innovation & Skills (BIS), Dept. Energy & Climate Change (DECC), Dept. Environment, Food & Rural Affairs (Defra)</p> <p>Low Carbon, Environmental Goods/ Services (LCEGS) stats</p>	<p>Long term National Low Carbon, Environmental Goods & Services analysis</p> <p>Since 2007/ 08 kMatrix has provided UK Government with LCEGS data. They adopted our definition of the LCEGS sector after our initial successes with the UK Regions, starting with the South East (via EnviroBusiness) and the North West (via Envirolink). Since 2007/ 08 they have audited the data and methodology rigorously, have recommended and implemented shared use of the data with DECC, UKTI and Defra and provided useful introductions to clients like New Zealand Government, Northern Ireland Government, Amec Engineering, etc.</p> <p>The national research has also resulted in a number of government supported supply chain and skills related sub- projects conducted for Northern Ireland, North West, London, Hull, Sheffield, East of England, South West and the South East.</p> <p>Our work for BIS has always included elements of economic baselining, competitive benchmarking , trend analysis and growth forecasting and is published in an annual high- level report that focuses primarily on LCEGS sub sectors reported at regional, national, and international level for sales, companies, employment, growth, imports and exports. This annual research acts as a barometer for the health of the UK LCEGS sector as well as a comparator for the relative growth of "green" activities within the UK economy as a whole.</p> <p>Internally, LCEGS data is provided in full detail (with extensive data and software training) so that BIS can continue to analyse the data in relation to key internal research projects or as part of externally tendered research studies. LCEGS data has been used extensively for much deeper research into the Wind and Nuclear Sectors by DECC and by Defra to gain a more in depth understanding of the markets for Climate Change Adaptation and Resilience activities. UKTI is beginning to use the data as an integrated part of its export planning and market research services. By transferring knowledge to our government clients we have added considerable value to the initial contract value and extended use of the data across multiple research and policy teams.</p> <p>Our recent work for BIS/ DECC and Defra also includes joint research into new "green" market activities (Clean Manufacturing and Clean Processes & Materials), the deepening of data levels (Nuclear Power, Carbon Finance, Wind and Carbon Capture & Storage) and the addition of new categories and data coding (Adaptation and Resilience) to satisfy emerging policy agendas. As part of this work we have provided a new level of information about international markets that reveals both the value and quality of country trading relationships and that starts to measure the UK share of specific international export markets.</p>

<p>UK Trade & Industry (UKTI)</p> <p>Cyber and Non-Cyber Security Sector Reporting</p>	<p>Long term national Cyber and Non- Cyber Security economy analysis</p> <p>We have provided national research on the global Security economy to UKTI since 2008. This work involved the creation and population of a sector definition, including details on over 3000 product and service activities, that defied measurement using SIC codes and has resulted in detailed dialogue with EU industry bodies about the wider adoption of the kMatrix definition and methodology for measuring security economic activity, growth and international opportunities.</p> <p>This work is also an example of where an initial sector definition has been adapted and enriched over time to include new market activities (Cyber Security for DSO and the Home Office) and deeper data levels to identify the size of international markets and also the nature of key customer groups within those markets. The sector definition now includes over 4,000 products and services (and rising), reflecting the expansion of Cyber Security activities.</p> <p>This is a high growth sector with ever expanding global markets and, as a result, growth in markets and in UK market share is closely monitored at the product and service level. Monitoring is now conducted and reported every 3- 6 months (for the current three year contract) and this information is shared as a series of country reports with all overseas representatives responsible for promoting UK sales.</p> <p>As with all of our sector databases, research and analysis is provided in report (external publication) and data tool-kit (internal research) formats and provides the resources for baseline, benchmark, competitive and forecast analysis for a range of economic measures that include production, consumption, growth, innovation, employment, companies, imports, exports and market share. Currently a team of up to eight internal staff are conducting in-house research on the data.</p>
<p>UK Trade & Industry (UKTI)</p> <p>Creative & Digital Media (CDM) Research</p>	<p>Long term national Creative and Digital Media economy analysis</p> <p>We have provided national research on global Digital Media markets to the UK regions since 2007 and to UKTI (Digital Media and Creative Industries) since 2009 and this has now been updated to 2013. This work involves the creation and population of a sector definition and digital ecosystems that reflected trends in digital "convergence" and could not be achieved using traditional SIC codes.</p> <p>The initial sector definition has been adapted and enriched over time to include new market activities (Creative Industries) and deeper data levels to identify the size of international markets and also the nature of key customer groups within those markets.</p> <p>UKTI uses kMatrix data because it is currently the only source of comparative and competitive data for global CDI exports and intends to continue updating the research on an annual basis. The most recent uses of the research are:</p> <ul style="list-style-type: none"> • Baseline and benchmarking export performance and using this information to directly inform current strategy • Deployment of kMatrix data and insights to all of its overseas representatives as a series of new (and updating) country reports • Informing the UK debate about "stats" for CDM and the changing definitions and measurement of CDM activities <p>This year UKTI <i>and its</i> UK partners are developing an industry wide 'metrics group' and have adopted kMatrix data as the baseline for the operational planning and annual measurement of national export performance. In future the export performance of all UK partners will be measured and evaluated using kMatrix data.</p>

<p>Greater London Authority</p> <p>Defining the Adaptation Economy</p>	<p>Defining & Quantifying the Global Adaptation Economy</p> <p>As part of our work on the Low Carbon Economy for BIS/ DECC and Defra we were commissioned to conduct research into Adaptation & Resilience (A&R) for Climate Change from 2009 to 2012. This was complex research because A&R economic activities are not recorded in official or unofficial statistics. Our methodology was able to define, collate evidence and then quantify A&R activities and then identify and estimate the level of activities attributable to Climate Change. This is seminal research in an area where the IPCC freely admits that there is no reliable source of economic data.</p> <p>This work was adopted by the EU for a funded research project (2013) and then by the GLA (2014), where a broader based definition of A&R has now been acknowledged and populated with data that draws upon a very wide evidence base. The economic sectors that underpin the Adaptation Economy are identified as: Agriculture & Forestry; Built Environment; Disaster Preparedness; Energy; Health; ICT; Natural Environment; Professional Services; Transport and Water.</p> <p>The research has produced a global, UK and London economic baseline for Adaptation activities and benchmarks London against a range of UK and international cities. The key research findings relate to the relatively small size of the Adaptation Economy, the fragmentation of data sources, its weak identity due to strong bonds with existing economic sectors, anticipated high growth and the potential to develop Adaptation clusters, urban v. rural differences and the need for educational activities to embed adaptation thinking about Climate Change.</p> <p>The research is due for publication in Dec 2014 and will be disseminated by workshop in Jan 2015. The research into comparative cities is due to be extended by joint working with the University College of London.</p>
<p>UK Trade & Industry (UKTI)</p> <p>Agri-technology Global Markets Analysis</p>	<p>Agri-technology Global Markets Analysis to boost UK export performance</p> <p>Agri-technology was selected as a priority UK sector in 2012/ 13 because of the importance of securing food for a global population under increasing pressures from climate change, decreasing natural resources and land degradation. It is a poorly documented sector, with activities spread across engineering, logistics, manufacturing, agriculture, biotechnology and other scientific and service sectors. kMatrix was commissioned by UKTI to define and size the sector and to quantify UK activities (domestic and international) within the global market.</p> <p>The research identified 3,000 product and service across 25 sub sectors that include categories like: Agri-Engineering, Animal Breeding, Aquaculture, Education & Training, Environmental & Sensor Technologies, Infrastructure & Logistics, Livestock Management, Plant Breeding, Post-Harvest Technologies, Research & Development, Soil & Crop Production and Water Management. The total value of global Agri-technology sales in 2013/14 was estimated at £251.4bn or approximately 0.46% of global GDP.</p> <p>The original purpose of the research was to inform UKTI marketing and export support activities on behalf of UK companies. The research is now available to a much wider audience and is being used by agricultural agencies to develop the business case for additional funding and services for the sector.</p>
<p>Bradford Metropolitan Council</p>	<p>Developing the Environmental Technologies sector at a local level</p> <p>The Council undertook a review in 2013 of the opportunities for growth in key industry sectors in Bradford. kMatrix and its partner Gyron were appointed to carry out the review of the Low Carbon, Energy and Environmental Sector.</p>

	<p>kMatrix undertook an analysis of detailed historical market data relating to the sector from the 2010 to 2013 period including number of businesses, sales, employment and growth rates. To support the analysis, Gyron carried out a consultation with a sample of sector businesses to gain their views on:</p> <ul style="list-style-type: none"> • The opportunities for growth and challenges facing them • Their expectations and wishes for engagement with the Council to help grow their businesses. <p>We carried out a review of relevant UK policy and legislation impacting on the sector in Bradford and prioritised key sub-sectors by size of employment and likely future growth rates to help focus sector development plans for the District</p> <p>Bradford Council has a better understanding of the Low Carbon, Energy and Environmental Sector in Bradford, including:</p> <ul style="list-style-type: none"> • An updated database of companies currently operating in the sector • Information about the comparative performance of the sector within the Leeds City Region and the UK • Knowledge of what help companies in the sector need <p>This information is currently helping Bradford Council to prioritise actions and develop a sector delivery plan in 2014 and 2015.</p>
<p>Yorkshire Forward Regional Development Agency</p> <p>Cluster Research & Development Plans</p>	<p>Regional Cluster Development projects in Yorkshire & Humberside</p> <p>In the early years of the Yorkshire and Humber Regional Development Agency we delivered three clusters studies for: Advanced Metals, Environmental Technologies and High Tech Manufacturing. These were region-wide studies, disaggregated into sub regions and included:</p> <ul style="list-style-type: none"> • Defining the activities for each cluster and then measuring economic impact in terms of sales, employment, companies, growth, imports and exports • Mapping traded and untraded dependencies for each cluster (using the Porter model) • Comparing regional business mix and performance with the other newly formed RDAs and Devolved Administrations (baseline and benchmark analysis) • Exploring the location, growth and opportunity for export markets • Developing a SWOT analysis for each cluster for the region, identifying cluster activities where a competitive advantage was clearly identified • Develop scenarios for the future development path for each cluster • Develop cost/ benefit options for return on RDA investment both within each cluster and between clusters. <p>Each study took about four months and involved widespread consultation with leading companies and public sector stakeholders. The project also involved working with consultants on other cluster projects, so that report findings could be compared and then combined. Further projects in the region were spawned from this work: steel supply chain mapping, impact of steel redundancies, renewables in Hull etc.</p> <p>As a result of the research all three clusters were approved for a total of £100m development funding over a three year period, including the establishment of specialist organisations to support Advanced Manufacturing/ Materials.</p>

<p>Yorkshire Forward and South Yorkshire Sub Region</p> <p>Bioremediation Cluster Development</p>	<p>Developing a Bioremediation Cluster using open innovation</p> <p>One additional project that followed our work on the main Yorkshire & Humber clusters was a part EU- funded project on the development of a regional Bioremediation cluster (as an off-shoot from the Biotech cluster). This was a two year open-innovation project that involved:</p> <ul style="list-style-type: none"> • Defining and mapping the Bioremediation cluster across the region. • Identifying companies with specific technology needs and market opportunities. • Constructing a cluster portal and recruiting business members • Cataloguing public holdings of bioremediation technologies (Construction, Defence, Agriculture etc). • Short listing technologies and quantifying their commercial potential • Testing the "fit" of these technologies with regional company market/ product strategies • Creating a range of technology investment portfolios with different risk/ reward profiles • Presenting the results with a view to attracting £1m of RDA investment into new technology development. <p>The project resulted in a report, portal, cluster members, a technology list and quantified analysis of a final portfolio of 20 technologies from QinetiQ, ADAS, BRE and others. A budget of £1m was set aside to invest in further technology development and commercialisation activities.</p>
<p>UK South East of England Development Agency</p> <p>Multi Sector Mapping and Market Analysis to Promote Economic Growth</p>	<p>Multi Sector Mapping and Market Analysis to Promote Economic Growth</p> <p>The South East of England Development Agency (SEEDA) was the second largest economic region of the UK (after London). It had a diverse economy with global companies in software, pharmaceuticals, aerospace and marine. After an initial pilot project in Environmental Technologies (see Case Study below), kMatrix was commissioned between 2006 and 2009/ 10 to deliver a bespoke research platform that all business support agencies across the South East could use to increase regional economic growth.</p> <p>This initial research lead to us working closely with SEEDA to develop detailed and robust definitions that stretched beyond the limitations of existing national data sets and would support operational service delivery through seven newly formed, multi-disciplinary cluster teams for Environmental Technologies, Digital Media, Health & Life Sciences, Built Environment, Aerospace, Security and Marine.</p> <p>Over a period of two years over £1m was invested in building market intelligence capacity as we rolled out a unique research programme that enabled cluster, research, locality and business support delivery teams to specify, share and compare intelligence about competitive performance in international markets. Cluster and research teams were trained to use the intelligence to inform strategy and enhance day-to-day delivery and were still working with the data up until the abolition of the RDAs due to the recession.</p> <p>As a result over 1,000 account managed companies across the seven clusters benefited from access to detailed market analysis and export support, focused on priority markets for the South East in the Middle East, Far East and the Americas.</p> <p>Much of the sector/ cluster work with SEEDA was adopted at a national level by BIS, UKTI etc and continues to this day (see earlier case studies for Low Carbon, Creative & Digital and Security).</p>

<p>EnviroBusiness & South East of England Development Agency</p> <p>Growing the Environmental Technology Sector</p>	<p>Growing the Environmental Technologies sector in the South East</p> <p>Our relationship with SEEDA and the regionally- based cluster organisation for the Low Carbon economy- EnviroBusiness- started in 2006/ 07 and extended to 2010.</p> <p>EnviroBusiness was our first UK customer (2006/ 07) for Environmental Technologies research, helping to create the current definition of the UK Low Carbon economy. The brief was to provide market intelligence and an in-depth analysis of the opportunities for the South East environmental sector in order to shape regional delivery plans and to prioritise further investments in business support. The key deliverables were:</p> <ul style="list-style-type: none"> • A detailed breakdown of EnviroBusiness target subsectors in the South East • Identification of any clusters (technologies and spatial) detailing their strengths, capabilities, opportunities, weaknesses and gaps • Identification of regional strengths, in relation to domestic and global market opportunities • Linkages between strengths, clusters, opportunities, etc <p>The first research project enabled them to secure significant regional funding for the sector, resulting in a global competitiveness programme (2009/ 2011). As a follow-on to our initial work with EnviroBusiness we were also engaged as part of the new three year global competitiveness programme to provide detailed baseline and benchmark analysis for the Environmental Technology/ Low Carbon sector, including actionable market intelligence for companies about key export markets/ countries. We also worked on a commercial basis with EnviroBusiness delivering a variety of projects across London</p> <p>This work in the South East was mirrored by our relationship with the next biggest UK Environmental cluster organisation (EnviroLink) in the North West. Over a period of several years, our combined support to both organisations resulted in 100's of UK environmental companies receiving direct marketing support, assistance with business planning and access to funding or investment.</p>
<p>Enworks North West and the Local Economic Partnerships</p> <p>Growing the Low Carbon Economy</p>	<p>Growing the Low Carbon Economy in the North West</p> <p>In 2012 Enworks commissioned a detail study of the Low Carbon and Environmental Goods and Services (LCEGS) sector for Local Authorities (LAs) and LEPs across the North West region. The purpose of the study was to:</p> <ul style="list-style-type: none"> • Develop understanding of LCEGS market opportunities in LA/ LEP areas • Understand the scope and capabilities of the sector in the above LA/ LEP areas, and to identify any clearly defined specialisms including any USPs • Identify barriers to growth and opportunities for diversification into the sector, and the specialist and generic business support required to overcome the barriers and maximise the opportunities. • Inform policy, strategy and the development of future projects supporting growth in this sector • Produce promotional and marketing material to support communication of the study findings. <p>By working closely with Enworks project team, local partnerships and large and small companies across the region we produced a series of reports for LEPs and Local Authorities that included:</p> <ul style="list-style-type: none"> • New economic baselines for local LCEGS, with an assessment of strengths and weaknesses, comparing LAs and LEPs across the region, with the region as a whole and with the UK

	<ul style="list-style-type: none"> • Economic development proposals for each LEP, that included evidenced domestic and international market opportunities • A series of regional company case studies that illustrated the relative strengths of each LEP • Company databases for each LEP • A quantified assessment of diversification opportunities for regional companies currently not operating within the LCEGS sector. <p>The study resulted in workshops to discuss the implementation of growth plans, a series of customised reports including local, regional and national data and a selection of databases (company) and software tools (LCEGS data, national LEP comparisons and UK diversification market opportunities) that could be used locally as part of business support initiatives. Enworks continues to be a client for market data and other services.</p>
<p>Environmental Technologies iNet, University of the West of England (UWE)</p> <p>Growing the Environmental Technology Sector</p>	<p>Growing the Environmental Technologies Sector in the South West</p> <p>The UWE iNet project started in 2009/ 10 with the commissioning of research by the University of the West of England to provide market intelligence and an in-depth analysis of the opportunities for the South West clean tech sector in order to shape its delivery plan and prioritise its expenditure. The project was designed to maximise the opportunities afforded by the development of low carbon technologies through better resource utilisation and targeted business support.</p> <p>This research delivered against the following objectives:</p> <ul style="list-style-type: none"> • A detailed breakdown of iNet target subsectors (renewable energy, sustainable transport, sustainable construction, waste management) in the South West • Identification of any clusters (technologies and spatial) detailing their strengths, capabilities, opportunities, weaknesses and gaps • Identification of regional strengths, in relation to domestic and global market opportunities • Linkages between strengths, clusters, opportunities, etc <p>We did this by providing a main report (similar in context and content to the national BIS LCEGS report, but with a regional focus) and a number of subsidiary factual economic reports for South West sub regions and for individual Local Authorities. These reports provided a detailed analysis of key sub sectors in the South West when compared with the LCEGS sector as a whole.</p> <p>The reports were underpinned by in depth research into the regional business base to identify a shortlist of 100 high growth, innovative clean tech companies that met the iNet criteria for intensive business support. This business listing was conducted by desk research and survey and included a rationale for why each business has been selected i.e. innovation performance or potential, company information and contact data. As a result of the research the UWE iNet could to:</p> <ul style="list-style-type: none"> • Share economic planning data for the LCEGS sector across the region • Identify and target innovative companies in the LCEGS sector or wanting to diversify into it • Provide tailored business support that was informed by detailed domestic and international market data • Answer ad hoc requests on LCEGS markets or activities <p>The iNet achieved all targets set by its EU and UK funding sources over its 30 month lifetime and achieve extended funding for a further year due to its success.</p>

<p>Cambridge Sub Region and East of England Regional Development Agency</p> <p>Sectoral Skills Needs Analysis</p>	<p>Multi Sector Skills Needs Analysis</p> <p>We conducted a multi- sector skills needs analysis for Cambridge and the East of England RDA. The sectors included Healthcare, ICT, Environmental Technologies and Engineering. The research involved building an occupational skills model for each sector and then building a sub regional, regional economic baseline for sales, companies, employment, growth, occupational skills and current skills gaps that could be benchmarked with the UK economy as a whole.</p> <p>National and regional growth was forecast for a 3 and 5 year horizon and the implications were modelled for increases in activity across the sector supply chains in terms of new company formation, sales growth, employment growth and skills needs (both new and upgraded). The analysis worked for individual sectors and across sectors (where occupational skills were shared) and profiled future employment/ skills needs across all occupational skill groups irrespective of the individual sector.</p> <p>The needs analysis research resulted in a series of skills maps, grounded in current and forecast economic performance that were used to centre the supply/ demand debate for skills on:</p> <ul style="list-style-type: none"> • A holistic picture of occupational skill needs across a broad section of the economy, • Focusing on unique regional business mix rather the national picture, and • Moving away from the very fragmented, "vertical" and historical picture to a more proactive response to future skill shortages. <p>The research was used to improve levels of awareness and promote debate between the supply side and demand side for skills, leading to a more flexible and informed planning process for building capacity in core industrial and service skills.</p>
<p>North West Regional Development Agency and BAE Systems</p> <p>Air Craft Carrier Supply Chain Analysis</p>	<p>Major Defence Project Supply Chain and Skills Analysis</p> <p>The Air Craft Carrier research was commissioned by the North West RDA to explore the long term potential for regional economic growth that could arise from the potential award of a major defence contract to BAE Systems and its supply chain. The research required a detailed mapping of the Air Craft Carrier Bill of Works across the regional supply base. This resulted in a detailed assessment of the current supply base and an analysis of their relevance to the various stages of the Air Craft Carrier build.</p> <p>The key research questions were:</p> <ul style="list-style-type: none"> • What could be supplied by the North West supply base over the 10- year build • What current gaps exist in the supplier base and how might they be filled • What capacity gaps will arise in the supplier base and how might they be addressed • Current and future skills gaps (qualitative and quantitative) that may impact on regional opportunities across the project supply chain. <p>The analysis identified the future size of the economic opportunity (sales, employment, innovation, occupational skills) with and without further intervention in the development of the supply base. Where intervention was seen to provide a positive outcome, the nature of the business support activity was identified i.e. assisted tendering, up skilling to work with new materials like titanium, investment to increase capacity and the creation of a new welding training facility.</p>

<p>North West Development Agency</p> <p>Corporate Account Management System</p>	<p>Account Managing the Corporate Business Base in the North West</p> <p>The North West Development Agency (NWDA) was the third largest UK region and was home to the largest proportion of UK heavy engineering/ manufacturing corporate businesses. It had a distinctive business mix facing significant risk from the emerging global economy and trends to "offshore" manufacturing. The NWDA commissioned us with a three year contract to create, develop and maintain a strategic research and CRM platform for its team of 35 corporate account managers.</p> <p>The system was to include:</p> <ul style="list-style-type: none"> • Baseline information about all corporates in the North West • An evidenced- based approach for selecting the top 700 corporates to be account managed • In- depth and routinely updated profiles of the 700 companies that could be accessed by account managers • At-Risk profiles for all companies based upon wider market trend reporting and analysis • A portfolio risk reporting/ management system that operated as an early warning system for major corporate decisions about relocation/ closure and downsizing. <p>The system was used to select a portfolio of key corporate accounts and maintain current information about the corporate for all account managers. System developments included routine company updates, call- off analysis for emerging problem companies, routine risk reporting on companies and the portfolio in general and some bespoke research to directly support company needs. This corporate service continued up until the closure of the Regional Development Agencies.</p>
<p>United Nations Industrial Development Organisation and NWDA</p> <p>Build a Business Data Base</p>	<p>Building UNIDO's Industrial Capacity in the UK</p> <p>UNIDO is the specialized agency of the United Nations that promotes industrial development for poverty reduction, inclusive globalization and environmental sustainability. It was co-located with the North West Regional Development Agency in the UK and we were commissioned by both parties to create a qualified database of UK companies that could be approached to provide services in specific industry sectors in specific countries.</p> <p>The brief required:</p> <ul style="list-style-type: none"> • A long list of companies primarily in manufacturing and engineering across a range of sectors • A short list of 200 companies that, through more detailed research, satisfied specific requirements and exhibited specific competencies • A key word searchable database that could be used each time a new UNIDO requirement was identified. <p>The database was refined and company information updated over a number of years as the UNIDO requirement and use of the system became more defined.</p>
<p>North West Regional Development Agency</p> <p>Chinese</p>	<p>Developing UK/ China Trading relations in the North West</p> <p>The North West Regional Development Agency was working with a consortium of Chinese businesses located in the UK to explore the options (including Liverpool) for a major European- based emporium for the sales of selected Chinese products</p>

<p>Industrial Partnership</p>	<p>The brief was to:</p> <ul style="list-style-type: none"> • Quantify all European markets sizes (value and volume) and growth rates for over 1,000 high value Chinese products • Model different product ranges for the proposed Emporium based upon the most attractive product portfolios • Model market penetration rates by product for different countries based upon known import/ export performance • Develop and handover a modeling tool from which a wide variety of market scenarios could be evaluated. <p>The research was used by NWDA to assess the value of trying to secure the Emporium for the North West and the Chinese consortium used the research for its business and investment case to the Chinese Government. The Emporium concept was eventually mothballed due to the adverse impact of the recession in Europe.</p>
<p>North West Regional Development Agency and Marconi</p> <p>Major Business Recycling Opportunity</p>	<p>kMatrix and its Dutch partners had developed a process called "Business Recycling." This was designed to offset the negative impacts of corporate down-sizing or re-location on regional economies by finding alternative business applications for the threatened skills, technology base and real estate. Impacts were measured in savings on closure budgets, jobs safeguarded/ created, square metres of commercial real estate developed, new businesses created and the preservation of corporate reputation</p> <p>Marconi was a major telecommunications employer that was planning to rationalise or relocate its activities in the North West. kMatrix and partners were commissioned to explore options that could avoid large scale redundancies that could reach into the 1,000's.</p> <p>Through a programme of research that included analysis of international markets, the regional skills base in telecommunications, wider application of the Marconi technology systems and alternative uses of the Marconi real estate a range of alternatives were presented to the company and to the Development Agency.</p> <p>The outcome was an agreement to:</p> <ul style="list-style-type: none"> • Purchase the site from Marconi • Retain Marconi as a smaller (but still significant) employer and anchor tenant on the site • Develop the site as a telecomms/ ICT hub for the development of a new regional cluster • Co-locate academic and business support services on the site • Provide grow-on space for other high technology businesses in the region • Provide incubation support for new spin out/ management buy- out businesses arising from the downsizing of Marconi staff. <p>As a result, most redundant staff that wanted to work moved into new businesses on the site, a number of new high tech businesses were created and growth constraints experienced elsewhere in the region were addressed.</p> <p>This project was one of 12 similar kMatrix projects conducted across Europe (three in the UK) for manufacturing companies like Philips, Sony and Siemens.</p>
<p>UK Low Carbon Innovation Coordination Group</p>	<p>Introducing new UK Carbon Innovation Metrics</p> <p>The LCICG is a national body including all government departments, the Devolved Administrations, Research Councils and government funded agencies and</p>

Low Carbon
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regulators like Ofgem, Technology Strategy Board (TSB), Carbon Trust and Crown Estates. It is responsible for coordinating the investment of hundreds of millions of pounds into low carbon technologies.

In the light of recent criticisms by the National Audit Office, about the transparency and overlap in structural Low Carbon investment programmes, kMatrix and two university partners were commissioned to conduct research into new policies and metrics for managing low carbon investments and initiatives that were SMART (specific, measurable, achievable, realistic and time-scaled), that were affordable and could be piloted before full implementation.

The process for achieving this combined desk research, consultation, interviews and assessment of existing good/ best practice (and its transferability). It involved explaining and selling the ideas to ensure "buy-in" in principle and then the packaging of a easy-to-use tool kit of policies and measures to ensure "buy-in" in practice. The project adopted impact evaluation practices from a variety of fields and developed a tiered engagement process that reflected the different levels of experience and resources across the 20+ organisations.

The project resulted in a series of practical workshops, followed by a report containing recommendations for policies and metrics that are currently being trialled by DECC, Ofgem, Carbon Trust, TSB and EPSRC (for review in six months) before a full roll out across the LCICG membership.