

## **An Industrial Strategy for the Electronics and Electrical Industries**

- 1.0 Executive Summary
- 2.0 The Electronics and Electrical Industries
- 3.0 Impact of the UK's future relationship with the EU
- 4.0 A new industrial strategy for the Electronics and Electrical industries

## 1.0 Executive Summary

The electronics and electrical industry in the UK provides vital infrastructures across the UK, and is of national importance. The companies developing products, services and providing employment are spread all across the UK, and in most regions. The policy areas highlighted in this Industrial Strategy are vital for the future prosperity of both the UK as a whole, and for development of strong regions.

The key strategic areas for the ESCO industry are in using electronics and electrical equipment and smart technologies to further the energy, transport and healthcare parts of the economy, and increasing the efficiency of industrial processes across the manufacturing base.

The framework policy areas that underpins these advances are essential for inclusion in an industrial strategy between Government and our industry. The impact of the changing relationship with the EU cannot be ignored, and some of the policy areas are reliant on the type of relationship that the UK has with Europe. These are highlighted where relevant.

1. Innovation is at the core of the opportunities for the ESCO industries. We support the extension of the existing catapult centres to specifically help companies take forward their innovation plans.
2. The digital transformation of the U.K., including the ESCO industries products and services, needs to be fully reflected in this and other industry strategies. The UK digital expertise needs to be encouraged and where relevant overtly supported in the UK.
3. The Intellectual Property of the products and services in our industry needs to be protected as the relationship with the EU changes. As innovation and the digital transformation advances, the role of an appropriate IP system in the UK increases.
4. The upgrading of national infrastructure, ranging from broadband to HS2 in the UK is vital, for the efficiency and productivity of our companies. Many companies will also provide the products and services for these major projects. Clarity is needed.
5. The UK should ratify the COP21 agreement. This will provide the framework under which innovation and development will be stimulated to deliver low carbon products and services.
6. Government needs to guarantee long term investments in Research and Development. These are vital for the industry to deliver low carbon, and digital products and infrastructures for the UK economy. This should extend beyond 2020.
7. Open finance for SMEs in particular, is essential for them to develop, grow and provide employment across the UK. ESCO supports the development of a British Business Bank. Freer tax regimes in the UK can be developed post EU membership, these should be used to facilitate innovation.

8. Appropriate skills for ESCO industries are vital. There is a current shortage of skills across the employment spectrum. ESCO calls for the industry to be given a much greater role to develop the training, and financing of all apprenticeships and training, with the assistance of relevant Government departments.
9. Product and system legislation supported by standards are at the heart of our industry. The industry should be an equal partner with Government in the transition from EU based to UK legislation. Only the industry has the expertise to develop the relevant standards needed for this transfer and the future beyond. They should be trusted to deliver.
10. The industry supports a continuation of the environmental ambitions for products and services developed in partnership with European colleagues. In the future there will be opportunities for the UK to take a lead on a worldwide stage. This opportunity should not be lost.
11. The compliance of all the ESCO industries products with relevant safety, environmental and energy related regulations underpins the industry. A clear regulatory approach should be put in place with industry to eliminate non-compliance from the UK market.
12. Planning policies should respect environmental concerns but not be too restrictive as the digital and low carbon economy develops.
13. The issues and suggested solutions in this strategy should be put in place with a very strong policy to stimulate UK demand. This can be achieved through the use of taxation, local and national stimulus policies, and other mechanisms. Government and industry should together investigate the barriers to the take up of technologies, and provide agreed solutions.
14. Export promotion will become much more important for the UK in the next years. The ESCO industries need a much more collaborative approach from Government. DIT need to work directly with industry to develop the export policies in the future.

## 2.0 The electronic and electrical industries

### 2.1 The sector

The Electronics and Electrical Industries Sector encompasses the UK industry for electronics, stand-alone electrical equipment, electrical and building services equipment and solutions for all building types and electricity networks, industrial automation, process instrumentation and medical and laboratory equipment. It accounts for £128bn of the UK economy, exporting £33bn and supports 1.27 million employees. The companies in the sector provide all the equipment that allows the digitisation of products, services and the wider economy, allowing the UK electricity systems to operate 24/7, and keeping UK factories manufacturing products for home and export. The sector has in the past been difficult to define, but recent collaborations between the major trade bodies in the sector allows the sector to be represented in a much more coordinated manner. This industrial strategy itself is a major step forward, covering a much wider range of the industry than in the past.

### 2.2 Sector opportunities – the importance of the sector in the development of key strategies for the UK

ESCO members' products and services are vital for the development of a number of key infrastructure projects over the next 5-10 years. It is these major themes for the UK that highlight the importance of the Electronic and Electrical Industries Sector, and if fully implemented, can deliver significant benefits for the UK society, manufacturing industry and the environment. Table 1 summarises the 4 main themes: smart energy, smart manufacturing, smart transport and smart healthcare. The extent of the financial gains to the UK can be seen as highly significant.

**TABLE 1 - Opportunities for the UK economy from a successful implementation of an ESCO Industrial Strategy**

**An innovative & productive electronic and electrical industrial sector that will drive and support the wider challenges of a 21st century UK economy**

	Smart Energy	Smart Manufacturing	Smart Transport	Smart Healthcare
Vision	<p>A consumer friendly low carbon, affordable, secure and smart energy system for the UK.</p> <p>Using the advantages of the UK liberalised markets and leadership in smart metering and smart grids.</p>	<p>Using smart manufacturing connecting the supply chain to deliver mass customisation at levels of productivity that rival any other countries.</p>	<p>Recognised world leader in delivering improved road safety and capacity using in-vehicle and road-side electronic systems.</p>	<p>UK as world-leader in person-centric health and social care using the medical data from connected electronic devices and systems.</p>
Benefits for UK plc	<p>The full implementation of smart energy technologies in addition to the energy efficiency benefits of technologies will deliver 25% reductions in energy use from buildings. DECC has estimated energy efficiency can lead to reductions equivalent to 22 power stations.</p>	<p>Smart manufacturing could deliver a £20 billion increase in turnover for the UK economy with the appropriate level of investment and support. This is based on UK specific reseach estimating 22.3% improvement on productivity.</p>	<p>Reducing congestion could save £8 billion a year in reducing travel times and avoid a £22 billion per year increase by 2025.</p>	<p>The NHS has the greatest potential to introduce new electronic systems, digital working practices, better use of data and wearable medical devices as the largest medical institution in the world. These opportunities are difficult to quantify at this stage, but efficiency benefits of only 5%, would lead to £9bn per annum savings.</p>
Objectives	<p>Maintain secure energy supplies for households, businesses and industry. Meet our COP21 targets using low carbon generation and smart technologies to minimise demand. Use the smart meter roll-out as catalyst for other smart technologies in homes and energy networks.</p>	<p>Double UK manufacturing productivity by 2030. Increase manufacturing and related GDP by 25% by 2030. Drive take up of smart manufacturing by SMEs at levels exceeding comparable nations by 2025.</p>	<p>Deliver world-beating electronic systems innovation by collaboration, expert knowledge and best practise. Support the automotive council with expert input. Sustain and enable growth of key skills needed in automotive electronics.</p>	<p>Provide better patient outcomes at reduced cost through early diagnosis and detection. Ensure the interoperability of medical devices, systems, buildings and logistics. Transform healthcare in the home with the wide-spread adoption of personal medical devices.</p>
Strategy	<p>Deliver the technologies and applications to support demand flexibility.</p> <p>Deliver smart energy efficiency in the home as per "Each home counts".</p> <p>Deliver intelligent controls and solutions to enable high performance new and refurbished commercial buildings.</p>	<p>Support SILC to establish a UK Sensor Systems Catapult Centre.</p> <p>Promote the industrial applications of digital connectivity for the UK.</p> <p>Promote the importance of the "Things" in the Internet of Things, and the skills to support.</p>	<p>Build a broad base of interested parties across industry, academia and stakeholders.</p> <p>Drive improvements in technical capabilities and know-how via workstreams.</p> <p>Promote the need for investment in R&amp;D.</p>	<p>Engage with the NHS to demonstrate the tangible benefits of smart medical electronics.</p> <p>Develop mobile phones, wearable and home-based devices as healthcare platforms.</p> <p>Deliver the devices to enable a person-centric healthcare approach.</p>

### 3.0 Impact of the UK's future relationship with the EU

This Industrial Strategy is developed mindful of the future negotiations leading towards the UK leaving the European Union. This changing relationship cannot be ignored, and for some of the framework policy areas the direction of negotiations and final outcomes will have a major impact. ESCO and the member trade associations have, and will, submit specific responses to BREXIT enquiries. The areas highlighted here refer to specific impacts to our framework policy areas.

- EU Directives and related standards have influenced products in our industry increasingly over the last 42 years. How existing, and future directives will be treated in the UK will be a major issue for the industry. ESCO members can provide expertise in these areas and call upon Government to seek its advice to develop the appropriate solutions for the future.
- The UK should remain part of the European Digital Single Market. If the UK is excluded from operating in the European Digital Single Market, and holding any influence upon it, this policy could develop to the disadvantage of UK businesses and consumers.
- Intellectual property issues are very closely linked to our membership of the EU. The details of a future relationship with the EU will have a profound impact on this essential area for companies' long term prosperity.
- The recent confirmation of a continuation of R&D funding post Brexit by the Government is welcomed, but industry needs longer term assurances beyond 2020.

## 4.0 A new industrial strategy for the Electronic and Electrical industries

### 4.1 Innovation policy

- We endorse the objectives of the 2010-2015 administration, in part continued post 2015, and suggest that this is supplemented by clearer articulation of the outcomes that are expected from a successful industrial policy.
- The industrial innovation policy should state what the success metrics are, how they will be measured and how frequently they will be published. In particular, these should be orientated towards growth outcomes and improvements in productivity.
- The innovation policy should address the low levels of public and private R&D investment and the low levels of public support for innovation. Access to finance, especially for SMEs, needs to be improved and other policies should address the relatively low levels of basic skills in the UK labour force and the lack of domestic scientific and engineering talent available to deliver and exploit innovation.
- As we understand and embrace emerging digital technologies, like the Internet of Things and Industry 4.0, it is increasingly evident that we need to continue to foster innovation and collaboration beyond our borders. Smart energy, transportation and manufacturing are already European conversations that we must continue to influence. Digital technologies represent an opportunity for SMEs and big business alike and we must build on the UK's lead in IT, electronics and research to shape and access the wider opportunity in the EU's single market.
- Innovation policies should, for the ESCO industries, be focused on delivering low carbon, consumer and end user beneficial solutions, utilising the digital opportunities and the new digital innovations essential for many markets.
- Government should recognise, identify and prioritise solutions for the many non-technical barriers for the implementation of innovation. ESCO members are aware of many of these restricting the growth of smart manufacturing solutions, low carbon energy systems, and the many innovations available for personal care in the health sector.
- Industry would need to be fully involved in the new thinking on the geographical nature of innovation policy. Clustering policies, the roles of Enterprise Zones and Local Enterprise Partnerships and the defocus on the Northern powerhouse all need to be brought together in a comprehensive policy focussed on growth for all the regions.
- The Catapult centres are recognised by industry as key in addressing the issue of converting the highly successful research activity into commercialised products and services in the UK, but they must become more accessible to SMEs and must not stray into lower Technology Readiness Levels below level 3 which should remain the territory of the universities.

## 4.2 Digital policies

- The potential digital transformation of all products and services needs to be reflected in the industrial strategy. Government must not restrict the role of digital to media and culture, it is essential for all other parts of the economy.
- The advances towards the Internet of Things (IoT), or Internet of Everything (IoE) will transform many products and services. ESCO members are central to this future. Government needs to fully engage with the businesses within the sector to ensure that the full benefits of these innovations are realised by UK based companies, large and small. The “Things” in the Internet of Things represent significant potential value for the UK and will broadly come from the sectors represented by ESCO.
- The UK leadership on Building Information Modelling (BIM) should form the basis of the development of a digital buildings policy. ESCO believes that UK based businesses can use the UK market developments as a key export opportunity for the future.
- The focus in Government on Digital should be spread across all departments and in particular in BEIS, and not restricted to the media and culture industries.
- Smart Manufacturing / Industry 4.0 are essential initiatives in order to grow the UK economy through increased contribution from producing goods for home and export. They potentially remove the disadvantage of manufacturing in high wage economies and thus disproportionately favour countries like the UK.

## 4.3 Intellectual property

- Currently, individuals and businesses have the choice when registering their trademarks or designs. National rights can be obtained by registering with the UK Intellectual Patent Office (IPO) or, if wider protection is required, an application can be made to the European Union Intellectual Property Office (EUIPO), for an EU Trade Mark (EUTM), or a Registered Community Design (RCD). These unitary rights afford trade mark or design protection in all current member states of the EU, including the UK. In addition, because the application and registration process is centralised, the system provides for a fast and cost effective system of obtaining extensive protection. A key arrangement for IP rights holders is the Application for Action (AFA) process, which enables rights holders to instruct Customs across the EU to detain shipments of goods entering or leaving the EU, where there is a reasonable suspicion on the part of Customs that the goods infringe their IP rights.

The maintenance of similar arrangements in the future will be essential for the ongoing protection of the ESCO companies' IP. Industry wishes to work with Government on the details of IP over the next years.



#### 4.4 Infrastructure

- The national infrastructure in the UK is vital for industry to operate efficiently. There are a number of major infrastructure investments that have been under discussion over several parliaments, the delays in decision making are affecting productivity throughout the economy including for our sector.
- These need to be decided as soon as possible. The government should quickly resolve doubts over HS2, airport expansion in the South East and Crossrail 2, as well as providing clarity on the path to the upgrading of the electricity network to facilitate the move towards low carbon energy generation.
- The UK's digital infrastructure remains relatively low speed and patchy in coverage both on cable/fibre broadband and with 3G/4G mobile. Industry needs to see a solid plan to update the digital infrastructure to the level where the full benefits of digital technology can be realised before it will feel comfortable in investing heavily in this technology in the UK.
- The Electronic and Electrical industries provide much of the equipment for many of these major projects, clarity and certainty is needed by industry, in particular post the Brexit vote.
- ESCO supports the development of a new national infrastructure plan financed by Treasury project bonds as suggested by the Government.
- The industry also recommends that the recommendations of the national Infrastructure commission are taken forward.

#### 4.5 Energy and Climate Change

- The UK government has indicated that it will respect its ambitious commitments to reduce Greenhouse Gases made by the EU on member states' behalf during the COP21 process. ESCO supports this ambition.
- Continue our ambitious drive towards renewable energy. The UK should take this opportunity to drive a more pragmatic renewable policy that supports the different renewable technologies on a commercial basis as they approach price parity with other energy sources.
- The large opportunities for UK industry to deliver smarter flexible energy networks and building systems should be at the forefront of an industrial policy. These are needed to facilitate higher levels of renewable energy contribution to the energy system and to keep energy prices low. The UK electronics and electrical industries are at the heart of these developments and, if developed and implemented in the UK, will be a real export opportunity for the whole industry.

- The newly formed BEIS department should use the merging of Business, Energy and Climate Change under one department, as a springboard to develop cohesive and co-ordinated policy.
- The focus on the reduction of carbon emissions from the building stock should be enhanced. In residential buildings consumers should be assisted to take advantage of the smart meter roll out and accompanying digital advances. In commercial buildings the role of intelligent building controls and building analytics provides a significant opportunity for businesses to reduce their energy costs, whilst utilizing the technologies provided by ESCO members.
- The means of assessing the energy intensity (kWh/m<sup>2</sup>) of commercial buildings should be adopted using the ODEX methodology. The ESCO community can advise on how this could be best introduced.
- There is a significant potential for reducing the energy consumption in industry from implementing automated energy efficient systems and technology, reducing the burden on generation.

#### 4.6 Research and Development

- The pending loss of EU funding requires a bold commitment from government in outlining its support for UK R&D as a key element underpinning economic growth. The government should underwrite grants in multinational EU projects and guarantee to protect UK R&D from any Brexit financial losses. The current approach in the government's chosen sectors should continue.
- R&D Tax Credits remain a vital tool to encourage an increase in the investment in this area in the UK.

#### 4.7 Access to finance

- Access to finance is a significant and enduring problem for many small and medium-sized businesses.
- There is a range of schemes led by the former Department for Business, Innovation & Skills to address areas of the market where there are problems. But there is work to be done in terms of managing the schemes as a unified portfolio and articulating what they are intended to achieve as a whole.
- Given the importance to the Government of promoting growth, greater benefits and public value would be achieved through "Treating the interventions as a programme, with a clearer focus on assessing what results can realistically be delivered." (Amyas Morse, head of the National Audit Office, November 2013).

- The European Investment Fund (EIF - a subsidiary of the European Investment Bank) has been an important source of funding for UK start-ups and the venture capital industry that supports them. Government should consider carefully how this system should transition into a UK based system, and should explore the potential of “new opportunities” such the British Business Bank. ESCO believes that the aim of this exercise should be to better focus finance for UK based companies and start-ups.

#### 4.8 Taxation

- Government and industry should discuss opportunities to use the new freedoms on taxation post Brexit, to boost investments in a number of key areas:
- The use of variable VAT rates and/or enhanced capital allowances as tools to encourage investment. This presents a wide range of opportunities in our sector to use this tax in an intelligent way to fund measures that are beneficial to householders, the environment and business. The following are immediate opportunities:
  - Approved building renovations in domestic and non-domestic properties,
  - Smart healthcare solutions for the benefit of the Treasury and patients,
  - Low carbon personal transport systems,
  - Technologies to increase productivity in factories and businesses.

#### 4.9 Education and skills

- National economic competitiveness and prosperity depend crucially on a highly skilled, adaptable and motivated workforce. In the modern economy it is clear that we need to broaden the meaning of skills extending it into the new knowledge economy.
- The structuring of the government’s new Trailblazer apprentice programs via national sectors should be welcomed, but more policy support is required for vocational programs at the non-elite level in innovative ways, which are not just labour-market solutions for the disaffected.
- There still needs to be some refinement in the funding of undergraduate Trailblazer apprenticeships so that the levy funds intended for vocational training to supplement the degree level academic training are not all consumed in paying university tuition fees – a presumably unintended consequence of the current rules.
- The Apprenticeship levy, although a significant cost for many businesses, will provide the incentive to professionalise all apprenticeships, and in the medium term allow an upskilling of the UK workforce. We propose however that there is scope for further consultation on how business can spend their levy payments that maintains the spend on apprentice development, whilst allowing employers some additional flexibility; as things

stand, many employers will be effectively unable to spend their levy payments and we would propose to bring forward some examples and suggested changes.

- Qualified electrical and electronics engineers, vital for the future of the industry, should be a key element of an industrial strategy and all sectors of the economy. Government and industry are already working together to rectify this through schemes like the Electronic Systems Degree Apprenticeship, and further programs as part of the Levy will be very beneficial.
- Despite the rather more proactive approach to training and apprenticeships, there will still be a deficit of qualified personnel for the Electronics and Electrical industries in the next 5-10 years. Therefore, free access to the EU engineering pool is essential to prevent a skills shortage from impacting our economic progress. Indeed, the Institution of Engineering and Technology's 2015 'Skills and Demand in Industry' report found that 64% of respondents identified a shortage of engineers as a 'threat to their business'. ESCO supports the UK migration systems to allow companies to access the people and skills that they need, from both within the EU and beyond.
- Companies will need to continue to be able to choose the right people for the job from the wider EU talent pool with minimum bureaucracy of work permits, whilst British engineers will need the opportunity to work anywhere in the EU too.
- There has been a historic gender imbalance in industry. If more females are encouraged into STEM subjects and technical careers, then this will help to address the problem of insufficient candidates for roles in our industry. The industry would welcome further support from Government in its efforts to achieve this.

#### 4.10 Legislation and standards

##### Legislation

Product legislation is so closely linked to EU legislation, and linked to World and European based standards, that it is difficult to consider how best to take these areas forward without clear decisions on the future role of this European legislation.

- EU Directives form the basis of much of the industry, from IP law to energy and sustainability policies. Industry proposes that there is a pragmatic approach to the adoption of future Directives, based on the benefits for the UK industry and society. In addition, a systematic approach should be adopted to review the role of existing EU Directives already implemented in the UK, and those which have been agreed but not yet fully implemented into UK law.
- The ongoing enforcement of Directives needs to be assessed for a post EU membership environment. If the UK continues to adhere to EU directives there needs to be an

agreement between the UK, the EU and industry as to how UK based industry can show compliance, but also not be at a disadvantage to imported goods and services.

- UK industry will be required to conform to EU legislation for the export of products into the EU and so conversely would seek to avoid any additional burden of differing UK legislation

## Standards

- European standards in the single market provide confidence that products designed and made in Europe meet the technical standards which many UK experts have helped to develop.
- UK products are recognised across Europe and beyond because of our active participation in European standards, and UK consumers and companies benefit from consistency, reduced cost and improved product safety.
- The UK presently holds high influence and voting weight in the European Standards Organisations and by working together with our European partners, 160,000 national standards have already been harmonised to fewer than 19,000 European standards today.
- EU standards are essential to our success in electrical and electronic systems and we must continue to fully participate in these important regulatory activities.
- Initial indications for the EU certification bodies CEN and CENELEC are that the UK would remain welcome to participate fully in the standards process as long as we continue to abide by the rules of the standards system. Key amongst these is that we should not inadvertently offer a "back-door" into European standards compliance for any non-European nations by, for example granting them "equivalence" status with British standards which are harmonised with European standards. The UK would need to be watchful in any trade deal negotiations to avoid breaching this requirement.
- ESCO has facilitated a senior level relationship with the BSI. Through the British Electro-technical Committee (BEC), a separate legally established standards organisation, ESCO will bring forward the strategic objectives for new and future standardisation.
  - This activity will be a key activity led and populated by the ESCO community.
  - It will co-ordinate the evolution of standards from the current system to any changed future arrangement, with the interests of UK based companies as its core.
  - As part of the industrial strategy for the industry, Government will need to support and engage with this vital activity.

### 4.11 Environment and sustainability

- The worldwide and in particular European focus on safe and environmental sustainable products and systems will continue to influence our industry into the future

- Much of the regulatory basis for the sustainability of products and services is based on EU directives. These range from the existing regulations covering the Waste from Electronic and Electrical Equipment (WEEE), and the Restriction of Hazardous Substances directive (RoHS), through to recycling and waste dumping policies. The Government must provide clear and precise guidelines as the ongoing support for these policies. Industry has already implemented market based solutions for many of these which need certainty for the future.
- The emergence of the principles of the circular economy as the next major direction for sustainable policy, will be central for the future development of all electronic and electrical products and systems. This is a worldwide issue, currently focussed at European level for UK industry. Government and Industry need to examine closely, how the principles of the circular economy can be taken forward in the UK, recognising the international nature of both the policy direction, the industries and their markets.

#### 4.12 Product compliance

- There are currently great concerns across the ESCO community about the damage that non-compliant and counterfeit products pose for UK based industry. These cover the safety, compatibility and energy performance aspects of products and systems. There are also societal and significant business impacts of widespread non-compliance.
- The development of a new industrial strategy for the Electronics and Electrical Industries must involve all products, home produced and imported, being compliant to relevant standards, directives and specifications.

#### 4.13 Planning policies

- The UK should remain committed to high environmental standards and the government should resist pressures to reduce levels of environmental protection.
- There are many opportunities for UK businesses in understanding and operating within an environmental framework that is progressive and strongly aligned with the EU.
- Public procurement policies should continue to favour the adoption of highly energy efficient new public buildings and infrastructures, and aim for a much greater pace and depth to the renovation of public buildings and infrastructures. All investments by the state should be showcases for innovation and be an encouragement for best practise.

#### 4.14 Stimulate demand and exports promotion

The future prosperity of the UK as a whole and of its industrial base, will be influenced by the level of home demand for products and services, and the levels of exports that can be created by UK based companies. It is hoped that the industrial strategy for the Electronics and Electrical

Industries together with other Government action, will limit the reductions in demand for exports to the EU, although it has to be assumed that there will be some reductions.

#### Stimulate the UK demand

- There are many facets to the creation of a strong home demand for products and services. A proactive taxation system is key, as is the overall health of the economy and employment levels.
- For the ESCO community the industrial strategy needs to encourage all products and services for businesses or households to be matched to their demands and requirements, as well as meeting higher strategic objectives.
- Government and industry should establish independent reviews on the barriers to the take up of technologies. The model used for the residential energy efficiency market could be replicated for a number of other markets.
- Education and awareness of the potential of new technologies is also a key enabler and government has a role in facilitating this through help in engagement with the wider industry, realistic access to Catapults for SMEs and the co-development with industry of technology demonstrators and “living laboratories”.

#### Export promotion

The key to the establishment and exploitation of export markets is a clear strategy for international trade and economic agreements.

1. Preferential access to markets through EU-third party trade deal – those in force and close to completion, together with WTO agreements should be protected.
2. Initial continuity on all international agreements currently managed through the EU should be established.
3. International markets should be carefully prioritised to make the most of new opportunities.

The support from Government for UK exports needs to be enhanced and focussed on the markets that Industry believes can be exploited for the greatest benefit.

The established UKTI network needs to be supported, but also directed towards a fully collaborative approach. ESCO believes that this would deliver increased value for the Government investment, and benefit UK industry to a great level.