

Low Carbon International Marketing Strategy – Interim Report

1 Introduction

1.1 Purpose of document

This document summarises the outputs to date of a project to develop an international marketing strategy that positions the UK as an international hub for low carbon solutions. The strategy aims to support increased trade and inward investment, creating jobs and wealth by establishing a leadership position for the UK and UK-based organisations in low carbon solutions.

The strategy will build awareness and support for the UK as a low carbon solution leader, through effective marketing of a distinctive UK proposition, backed up with supporting evidence. The proposition will unify the breadth of the UK offer and illuminate the benefits of partnering with the UK in transitioning to a low carbon economy.

Findings are primarily based upon a phase of qualitative research undertaken with stakeholders from industry, academia, climate change organisations, representative bodies and government.

Low carbon is a dynamic subject area with government policy, industry responses and technology continually evolving. As a result, this report represents a snapshot of current thinking. We will continue to build the strategy with further stakeholder feedback.

This document represents a phase of stakeholder engagement that builds on previous engagement phases including interviews, discussions, written input and a series of workshops with industry and government stakeholders to critique initial thinking.

It should be highlighted that this project is a UK strategy, not a UKTI strategy. It is being developed for the benefit of UK industry to help maximise opportunities from the international market for low carbon solutions. This is a marketing focused strategy and does not aim to critique or influence UK Government policy.

1.2 Origins of the project

With the recent climate change negotiations in Poznan and the upcoming UN conference on climate change in Copenhagen 2009, the global market for low carbon solutions is expected to experience a dramatic transformation. Governmental, business and consumer awareness of climate change and the need to respond to it has reached high levels in recent years and continues to grow. The economic costs of failing to act promptly to tackle climate change have been recognised and widely accepted.

This project is part of the UK's preparation for this transformation. It is an opportune time to launch a programme of effective marketing that will position the UK as a global hub for low carbon solutions. Collaboration underpins the project and is taking place across Government and organisations from across industry and academia that are exploring low carbon opportunities, such as the Carbon Trust and the CBI.

This document is also part of a broader programme of international marketing activity coordinated by UKTI. Five sector based marketing strategies have been developed for the UK (Financial Services, Life Sciences, Energy, ICT and Creative Industries). Currently, two further strategies, Advanced Engineering and Low Carbon Economy Solutions, are in development.

1.3 What we are asking from the reader

We would appreciate comments across all aspects of this report, but it may be helpful to consider in particular the points below when reading through the report;

- Do you agree with the leadership claims set out for the UK (section 6.1)?
- Do you agree with the outline of UK strengths in the low carbon area (sections 6.3, 6.4, 6.5 and 6.6)?
- It would be helpful if you could reflect critically on the proposition – does it resonate? Is it compelling? (Section 8)
- Any suggestions you may have of examples of UK low carbon solution capability and leadership, especially if including an international dynamic. These suggestions may be useful for illustration of section 9 – ‘Bringing the Proposition to Life’.

We are seeking your input by 5pm on 16th January 2009. Please forward your feedback to martin.whalley@ukti.gsi.gov.uk.

2 Project ambition and objectives

2.1 The overarching ambition

“To produce a strategy for marketing the UK as a global hub for low carbon economy solutions by both government and industry on the competitive world stage”

Building on this ambition, the project aims to:

- Engage and involve organisations and individuals across private and public sectors, including climate change organisations
- Bring together and synthesise available market research within the low carbon arena
- Use marketing to raise international awareness of the UK’s offer. This awareness is the foundation for developing profitable trade and investment partnerships as part of the transition to the global low carbon economy

This work is part of a wider effort by government to identify how the UK can both achieve a transition to a low carbon economy itself and encourage and support other nations in a similar journey.

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3 The project to date

3.1 Knowledge base

Research has been gathered on low carbon solutions and related topics. This knowledge base has been used to build the proposition and will guide future strategic marketing decisions. This knowledge base will continue to expand and be updated to ensure the strategy reflects changes in the global policy and market environment

3.2 Engaging stakeholders

A three phase programme of stakeholder engagement has been undertaken with the aim to gather insights into the international market for low carbon solutions and evidence to support a compelling UK low carbon international proposition. This is the start of a broad ongoing engagement process bringing together government, industry and academia partners to plan and deliver effective marketing overseas.

Stages of stakeholder engagement to date:

- **Initial stakeholder engagement:** Connecting with over 100 individuals, through face to face or telephone interviews, workshops, meetings, or email
- **Hypothesis validation:** Two workshops bringing together a selection of stakeholders from government, industry and academia to review interim outputs of the project
- **Stakeholder review:** A broad review of the interim report (this document)

3.3 Looking ahead

Strategy development will continue in January 2009 with the integration of feedback on this interim document. Concurrently, a phase of implementation planning will be completed, leading up to a strategy launch in March 2009.

4 Building blocks for the strategy

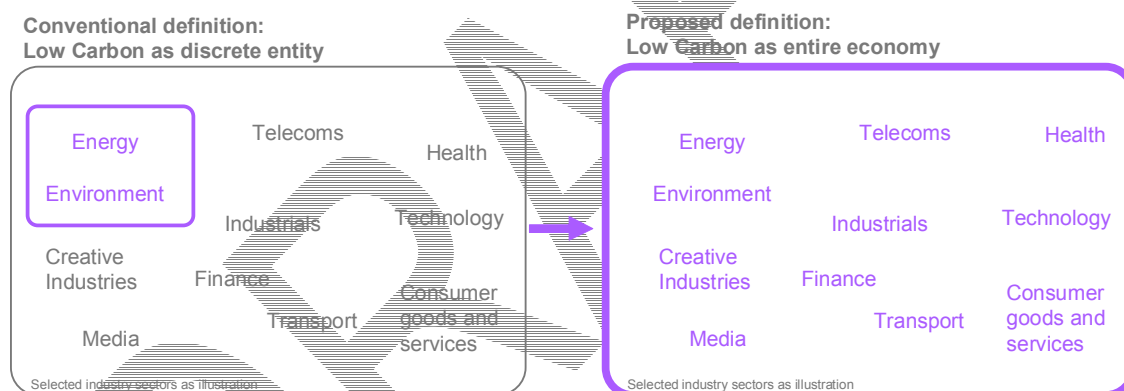
4.1 Core construct – defining the low carbon economy

Stakeholder research indicates that a range of definitions exist for the low carbon economy:

- Many people associate low carbon economy solely with renewables and environmental goods and services.
- In contrast, some people see low carbon as a theme that runs through all products and services, industries and sectors

“People don’t understand the scale of the low carbon economy. It’s more than energy; it’s a whole change of life.” Stakeholder interview. November 2008

The strategy will take the broadest definition, as it provides the greatest potential competitive advantage for the UK and offers the most opportunities for UK businesses. ‘Low Carbon’ is also a language that has been adopted by many operating in this space and hits at the heart of the economic/environment opportunity.



However, this holistic definition represents an aspiration for the UK and all countries looking to operate as low carbon economies. Countries looking to embrace low carbon will need to gain consensus on the reach and opportunities of decarbonisation.

4.2 The language of low carbon

The project recognised the diverse range of terms associated with ‘low carbon’, including ‘climate change’, ‘green’, ‘sustainability’, ‘one planet living’, and ‘corporate social responsibility’. This broad lexicon is a likely source of future misunderstanding.

This strategy will use the term ‘low carbon’ – defined as a way of thinking, behaving, and operating that minimises carbon emissions (and equivalents) whilst enabling sustainable use of natural resources and growth in standards of living. The term encompasses the process of transitioning to and operating within a resource efficient and environmentally sustainable economy.

4.3 Economic, environmental and social benefits

Achieving a transition to a low carbon society will offer several broad benefits of interest to international buyers and investors:

- **Economic benefits** including managed risk and reputation, increased energy efficiency and cost reduction, and energy security
- **Environmental benefits** including reduction of carbon emissions and equivalents, minimised local environmental impacts, and sustainability at the broader level
- **Social benefits** including sustained and sustainable growth in standards of living – globally and locally

These benefits must be made real for international customers. The emphasis across benefits will differ across international audiences and each market will need to be considered separately for priority of message.

4.4 The need for a vision

The future global low carbon economy is unclear as it remains an aspiration for most nations. With this in mind, this strategy recommends the projection of a vision for what the future global and local low carbon economy will look like.

“Businesses abroad don’t know what a low carbon future will look like and how they will operate. There is a great opportunity to provide a vision for what it might look like.”

Stakeholder interview. November 2008

An arresting vision will be required to generate interest in low carbon solutions as a way of illustrating the environmental and economic benefits and opportunities. Internationally, there are many definitions and visions for the low carbon economy, the opportunity for this strategy is to bring them together to tell a unified story

The UK is well positioned to define and project a vision for the future low carbon economy. The vision can be developed and marketed as the context for a compelling articulation of the UK offer. A vision hypothesis is included in section 8 of this document.

5 A review of global demand

5.1 Introduction

This section aims to identify the global demand that the UK offer can fulfil.

FCO overseas posts are helping gather insight into market readiness and the potential opportunity for UK businesses. From this and other research a complex array of factors influencing global demand is emerging as well as macro market characteristics, such as high carbon emissions and progressive governments.

5.2 Demand drivers in summary

Demand and its drivers can be clustered on three levels – government, business and consumer. Further clustering can be achieved through separating drivers that are environment led versus economic led as illustrated in figure 1. Drivers highlighted in bold italics were more frequently mentioned in interviews.

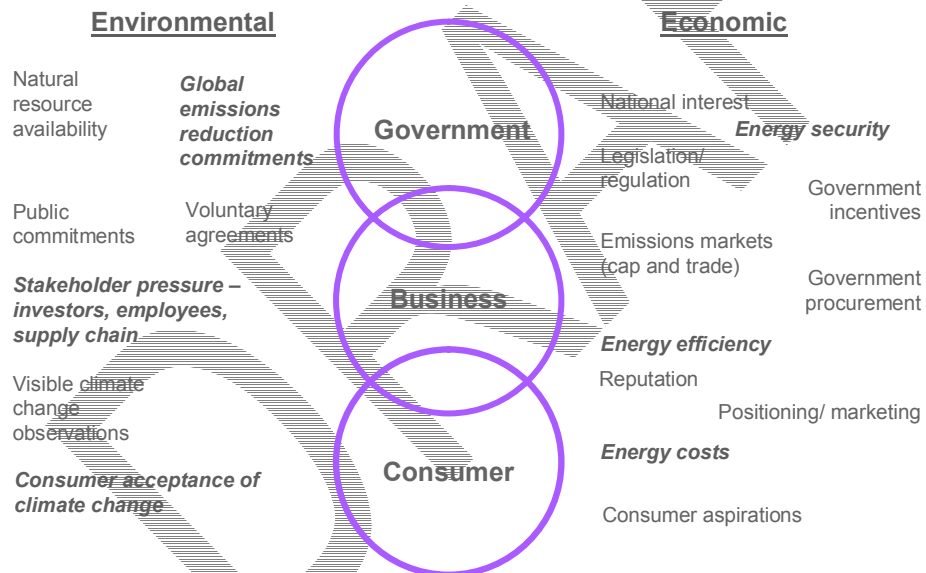


Figure 1: Low carbon demand drivers. Source: Stakeholder consultation

5.3 The journey of transition

It is likely that national governments and businesses will all have different start points on the journey towards a low carbon orientation. Each will follow their own path, but are likely to converge towards a common end point. Because of these differences, each nation and organisation is likely to require a customised solution and tailored advice to progress their transition so that economic, social and environmental benefits are maximised.

The scale of the journey is described by many as a social and economic revolution, affecting all sectors and levels of the economy. A change of this magnitude requires deep collaboration and partnership across public and private organisations as well as holistic long term thinking and commitment. It will require low carbon to be placed in the economic mainstream and be seen as a source of social, environmental and economic benefits.

For the purposes of marketing, a six step process has been developed to help map out a market's readiness for low carbon solutions. Markets irrespective of their start point and journey are likely to follow these generic steps.

1. Recognising and sizing the issue - climate/resources/cost/resilience
2. The economic challenge - decouple growth and increased carbon
3. The necessary partnership - regulation and innovation
4. The first and biggest steps – energy intensive sectors
5. The penny drops – permeating the entire economy
6. Business as usual – carbon is part of mainstream management

Each step on the journey will create opportunities for trade and investment partnerships. To effect transformational change requires reframing and reengineering our ways of working and living. This presents opportunities for organisations that advise, design, manage and provide technologies for process and behavioural change.

The journey of transition for low carbon from the economic margins to the mainstream need not be linear. Ahead of regulation, strategies and business services can be adopted which serve business and social needs, affect all parts of the economy and deliver against carbon reduction.

The journey will be driven by both obligation (regulation) and perceived opportunity (business growth and cost saving). A UK strategy must service and support both approaches and acknowledge the different factors that impact on procurers of low carbon solutions.

5.4 Market / business needs to affect a transition

Although each market will need to be treated differently, three generic customer needs can be identified that will help to shape the UK's proposition and offering.

- **The need for prosperity:** decoupling carbon emissions from economic growth. As well as carbon reduction, products and services will need to deliver economic and social benefits (increasing energy and process efficiency and designing out wastage).
- **The need for leadership:** with the perceived effort of achieving a transition to a low carbon economy, organisations need to mitigate the perceived risk and costs. An opportunity exists for thought, technology and action leadership to act as a sign post and catalyst for transformation.
- **The need for innovation:** products and services that bring new opportunities and more effective ways of operating in a low carbon economy.

5.5 Characteristics of opportunity markets

Based on market information a list of characteristics a market will exhibit if committed to transitioning to a low carbon economy can be created. By using these characteristics it is possible to identify areas of opportunity for trade and investment partnerships. Characteristics include:

- High Greenhouse gas emissions
- Long term government commitments
- Clear and long term regulatory environment
- Large domestic economy
- High economic growth rate
- Greater than average vulnerability to the impacts of climate change
- Comparative strength domestic low carbon offer

These characteristics are not a definitive list. They sit alongside the other broader trade and investment factors (for instance, barriers to entry and cultural synergies).

6 The UK capability

6.1 Leadership claims for the UK

From our research so far, there appear to be four leadership claims for the UK:

- Leaders in **commitment** with a clear intention to address the challenges of climate change and sustainable development, at both a governmental and industry level
- Leaders in **alignment**: bringing together social, environmental and commercial agendas to achieve both carbon reduction and prosperity growth
- Leaders in **management**: measuring, trading and managing carbon and advising on all aspects of carbon reduction
- Leaders in **transitioning** low carbon solutions into the **mainstream** of economic activity

Key considerations for articulating a UK proposition include the pace at which the market and competitor capability is moving, and the UK's historical low carbon performance (for example in renewable energy generation and domestic waste recycling)

6.2 Clustering UK capability

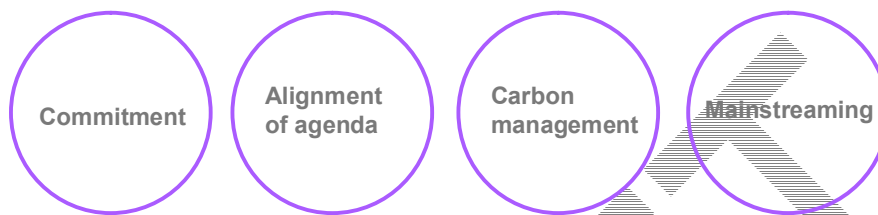
Recognising the dynamic and far reaching nature of the UK strengths, this review does not claim to be a complete audit of low carbon capabilities but more an investigation of the best of the UK offer and identification of cross sector strength themes. UK capabilities are clustered in three areas:

- National cross sector strengths which are widely recognised characteristics and have made the UK a preferred location for investment and trade partner.
- Low carbon transition capabilities that can support the economic and social transition to a low carbon economy
- Carbon focused capability (renewables and environmental goods and services)

6.3 Summary of UK strengths

Within each cluster, strengths can be summarised into key areas

UK leadership claims



UK supporting strengths



6.4 National cross sector strengths

- The UK has a **committed Government** with progressive policy and a strong voice on the international, national and local stage
 - The UK has established the Department for Energy and Climate Change to focus on creating a secure and sustainable energy future for the UK

“Not many places can say they have a minister for climate change. We don’t appear to be running away from the issue despite the financial crisis.” Stakeholder interview. November 2008
 - The Climate Change Bill has created a legally binding commitment to reduce emissions by 80 per cent by 2050 – an international first for climate regulation
 - The Climate Change Committee have recently published the first of three carbon budgets that makes emission reduction recommendations to ensure an 80% reduction on 1990 levels is achieved by 2050
 - The UK Government’s sustainable procurement action plan aims to ensure resource efficiency and carbon reduction for UK government suppliers.
 - The Stern Review (which is the foundation for Government action) has become internationally acclaimed for its groundbreaking thought leadership
 - Devolved administrations and regional development agencies continue to commission innovative projects that engage partners and members of the public in reducing carbon emissions
- The UK has **strong institutions** and intermediaries that support UK businesses in identifying opportunities and finding innovative and commercial ways of reducing carbon emissions
 - The CBI has brought together the UK’s biggest businesses by creating the Climate Change Task Force to contribute to the climate change debate in the UK
 - The Carbon Trust is actively engaging businesses across the UK to raise awareness of the commercial opportunity of reducing carbon emissions
- The UK is home to a **highly-skilled and entrepreneurial workforce**, backed up by world-class science, research and engineering capability
 - In its response to the Stern review, the UK Government has acknowledged the importance and power of UK talent in building a low carbon economy. This influences a broad range of Government policies and projects
 - University spin-outs led by UK entrepreneurial and research talent have created 13,000 jobs and generated a turnover of £358 million
- UK businesses are **progressive** in responding to climate change, embracing creativity and innovation and demonstrating a preparedness to change. The UK is home to many leading low carbon businesses whose influence permeates across the global economy.

- Retailers such as B&Q and M&S influence their supply chains to reduce emissions. In addition, consumer facing retailer initiatives such as product labelling are raising awareness of emissions among UK consumers
- British Gas and its parent Centrica have been identified by the Carbon Disclosure Project as a worldwide leader in carbon disclosure and climate change strategy
- The UK has **responsive consumers** who are increasingly aware and concerned about the impacts of climate change. In an Ipsos Mori Poll, 82 per cent of UK consumers were fairly or very concerned about climate change and 71 per cent agreed that personal action could help reduce impacts of climate change. UK consumers are adaptive and receptive to new products and technologies
- The UK has a wealth of **natural resources** needed for developing renewable expertise and deploying new renewable technologies. This creates exportable talent and skills and is attractive to foreign renewable companies looking to invest overseas
 - The UK's North Sea industry is well positioned to provide services for off-shore wind and carbon storage
 - The UK's wind resource has the theoretical potential to generate 1000 TWh/y, three times the existing energy consumption in the UK
 - The UK's shores are among the most tidally active in Europe with the potential to generate as much as 15GW of power.

6.5 Low carbon transitional capabilities

- The UK is a leader in **standard-setting** worldwide. The UK is creating the benchmarks that are becoming the global norms for carbon measurement and control
 - BSI, DEFRA and the Carbon Trust have jointly developed PAS 2050, a methodology for assessing the life cycle greenhouse gas emissions of goods and services.
 - BREEAM International provides a range of methods and tools specifically designed to understand the environmental impact of construction projects internationally
- The UK's **professional services** support and advise businesses and governments in the transformational change required to decarbonise. Areas of UK strength in services include financial services, management consulting, ICT, law, environmental consulting, building design and construction management
 - Carbon auditing. Manchester Enterprises commissioned Deloitte to complete a mini Stern for Manchester to create an evidence base for city-wide decision making
 - Carbon reduction methodologies. For instance, since 2001 The Carbon Trust has worked with UK businesses to save £1 billion of energy costs and cut carbon emissions by 17 million tonnes.
 - UK architecture and engineering firms are creating designs for low carbon cities across Asia and the Middle East. For instance, Foster+Partners are providing master planning services for the Masdar initiative in Abu Dhabi
- The UK's **research and innovation** capability means the UK can claim a thought leadership position in climate change mitigation and adaptation. It is also a leading source of new ideas for solutions that will support the decarbonisation process
 - Globally the UK receives 12 per cent of academic citations and is home to some of world's leading climate change research institutions, such as the Met Office Hadley Centre and the Tyndell Centre for climate change research
 - The UK is home to eight of the world's top 50 universities with four in the top 10
 - Expenditure on R&D in the UK was £23.2 billion in 2006, with 62 per cent of R&D being undertaken by the private sector
- With London as a global financial centre, low carbon projects have unprecedented **access to finance and financial services.**
 - A quarter of the world's largest financial companies have their European headquarters in London. Over 550 international banks have offices in London compared to just 280 in Frankfurt and 250 in New York
 - Through the Carbon Trust, the UK Government provides interest free loans to businesses looking to develop low carbon products and services

- The UK's capabilities in **high-value manufacturing and engineering** are playing an important role in making low carbon product production economically viable
 - The UK is well placed to develop the low carbon engines of the future. 25-30 per cent of European engine production is based in the UK. The UK also has significant expertise in control systems and electric drivetrains
 - UK small and medium enterprises offer niche areas of low carbon technology expertise. For instance, Solar Century is a market leader in solar energy capture that is rapidly expanding across Europe with offices in France, Italy and Spain

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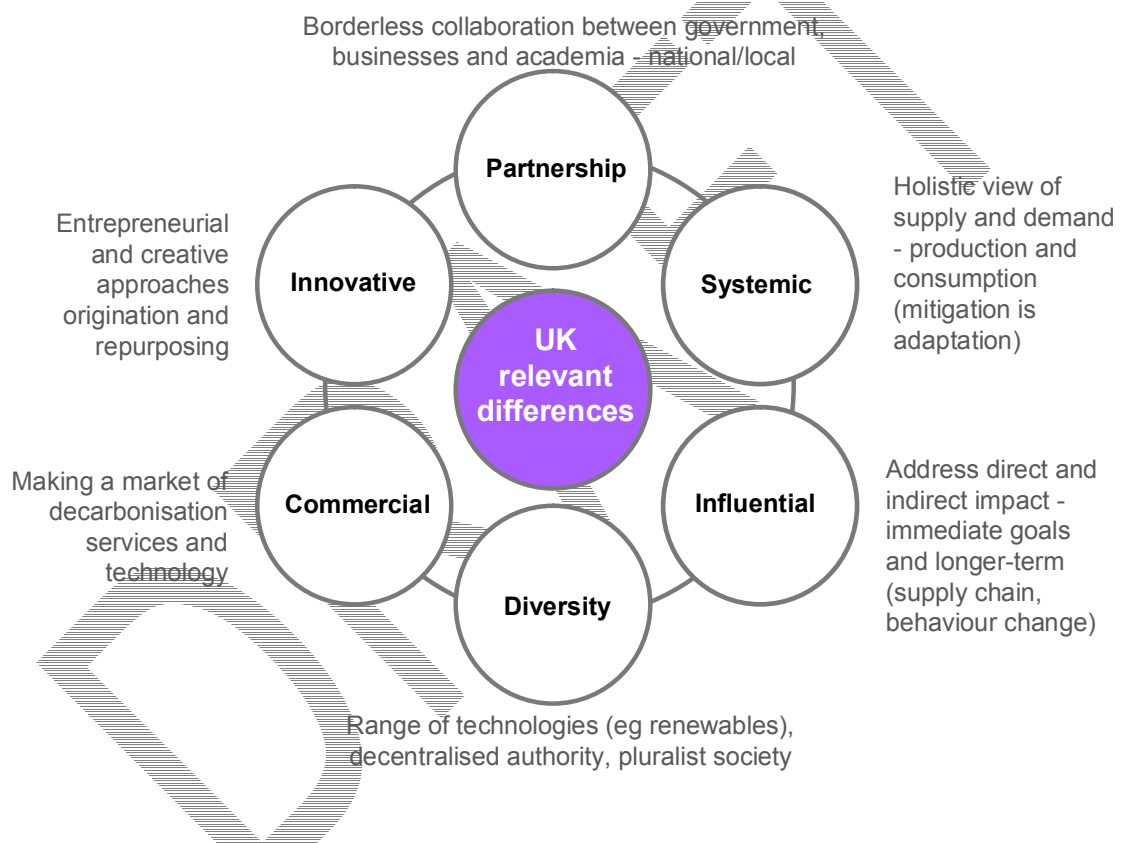
6.6 Carbon focused capabilities

- The UK leads the world in **carbon measurement and carbon management** – assessing an organisation's carbon footprint, making carbon a boardroom issue, and advising on how carbon impacts on the entire supply chain, from project finance to packaging. For example:
 - Arup has recently completed a landmark feasibility study on developments in the Thames Gateway to determine the potential of the region to be a low carbon development area
 - The Carbon Trust has developed methodologies to help businesses measure and track their carbon emissions. Those that successfully adopt carbon reduction practices are eligible to apply for The Carbon Trust standard to certify a genuine commitment.
- **Marine, Off-shore** and potential for **Carbon Capture and Storage (CCS)**. The UK's expertise in off-shore oil and gas provides a powerful platform for new technologies such as CCS
 - The Department for Energy and Climate Change recently announced that the UK is a global leader in offshore wind energy generation with 597MW of generation capacity following the opening of Lynn and Inner Dowsing farms in October 2008
 - Marine Current Turbines in Bristol recently launched the world's first commercial tidal generation facility.
- **Sustainable buildings**. With 40 per cent of emissions originating from buildings, the UK has increasingly focused on improving the environmental performance of the places we live and work.
 - UK building designers, architects and engineers such as Foster+Partners and Arup, continue to apply good design principles and technology to improve environmental performance
 - UK standards and best practice such as The Code for Sustainable Homes, BREEAM and energy performance certificates are all designed to promote the development of low carbon buildings
- London is the leading global centre for **carbon trading**
 - The UK emissions trading scheme (ETS) that ended in 2006 was the first economy wide greenhouse gas emissions trading scheme, allowing the UK to take a leading position for further schemes
 - Most carbon emissions (82 per cent of transactions in 2006) from the EU ETS are traded through the ICE futures exchange in London
 - The UK is involved in the highest number of Clean Development Mechanism (CDM) projects of any investing country

7 Themes that underpin the UK offer

The UK's broad strengths and assets can be clustered into common themes that underpin the collective offer of the UK. Themes act as a unifier of the broad range of strengths that the UK can offer international partners and hence help to creating a compelling proposition.

Key themes for UK strengths



Although many of these themes are not unique to the UK, blended together they will form the basis of a differentiated proposition.

8 A proposition for the UK

A core proposition for the UK has been developed as an initial hypothesis for testing and validation. It aims to unite the rich and diverse strengths of the UK's low carbon offer. It is not considered a strap line but more a unifying core thought that will drive marketing and communications.

The UK proposition has two key foundations:

- A future vision for the global low carbon economy
- A summary of the UK's offer to the world

8.1 A vision for the future global low carbon economy

Transitioning to and operating as a low carbon economy requires a progressive agenda but can become a platform for future economic growth and social prosperity. A low carbon economy and a thriving economy are compatible and complementary.

The low carbon economy is the economy but through a low carbon lens. It penetrates all sectors, consumers, interactions and transactions. It is therefore everybody's business and everybody's opportunity.

Benefits are short and long term, big and small. From the incremental carbon reduction and cost savings of home insulation to the long term shifts in patterns of living and doing business that will bring environmental, economic and social benefits for all.

8.2 The UK's offer to the world

The UK offers the knowledge, technology and experience to bring about incremental and dramatic reductions in carbon emissions – a low carbon consultancy on a big scale.

With a progressive policy and business environment that fosters carbon reduction, the UK is designing and developing the solutions that will increasingly prove valuable to international partners looking to reduce their own emissions.

With creativity, ingenuity and technological expertise, the UK solutions and services make it possible to incorporate carbon reduction into the mainstream of everyday government and business practice.

8.3 A proposition for the UK

The UK is taking low carbon mainstream...

The UK is showing the world how to create a thriving low carbon economy, aligning commercial needs with social and environmental responsibilities by placing carbon management in the economic mainstream.

Supporting proposition narrative

- If tackling climate change is to be the greatest challenge of the 21st century, multi-lateral action will be necessary to shape and coordinate the way societies and economies respond
- Low carbon economic and social transformation requires significant and thoughtfully designed interventions. It requires solutions that reap environmental and economic benefits for those that commission, deliver and use them
- By placing low carbon in the economic mainstream, the UK is developing the knowledge, skills and technologies that supports other nations in making the transition
- The UK is able to lead other nations navigate the economic and social barriers to change – by advising on policy, redesigning product, services and the living environment, re-engineering processes and spearheading continuous innovation
- The UK recognises that a low carbon economy and a thriving economy are one and the same in a world where climate change necessitates dramatic global responses.

Six key messages

Message 1 (partnership):

The UK's open culture and collaborative business environment nurtures and models the partnerships needed to make a low carbon economy thrive

Message 2 (commercial):

Pragmatic and commercial, the UK's approach to government and business shows how a low carbon economy is achievable with consistent economic growth ambitions

Message 3 (innovation):

The UK's leadership in innovation and technology creates products and services that can deliver carbon reduction alongside efficiency and cost benefits

Message 4 (systemic):

The UK's holistic approach is creating many effective pathways towards carbon reduction

Message 5 (influence):

UK government and business demonstrate world leadership in making commitments, setting standards and creating stable platforms for the future low carbon economy

Message 6 (range)

UK policy and innovation platform supports a broader mix of solutions, ensuring that carbon reduction opportunities can be maximised for the benefit of all

Trade partner benefits

Progressive UK firms bring a systemic approach and point-expertise, delivering effective products and services for carbon reduction.

The diversity of UK thought leadership, innovation and technology means that solutions can be developed and deployed to approach carbon reduction from multiple perspectives.

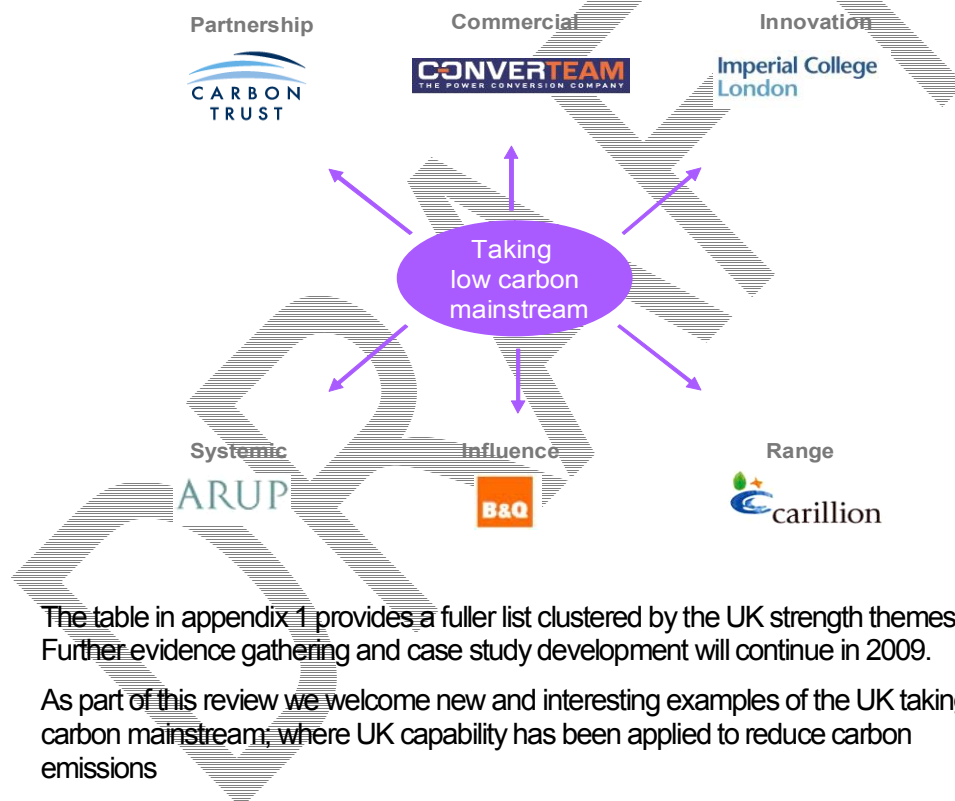
Inward investor benefits

For inward investors, the UK is the ideal test-bed for innovation and commercialisation, combining an enabling business climate and research excellence, with the opportunities offered by responsive consumers and advantageous natural resources. This environment supports the exploration of diverse solutions and the development of globally scalable standards.

9 Bringing the proposition to life

There are many powerful and compelling examples of UK organisations taking low carbon mainstream. It is these case studies that demonstrate the potential and advantage of the UK offer for overseas partners.

The project has collated a selection of examples that were proposed by stakeholders as a starting point. The figure below illustrates some organisations that are bringing the UK proposition to life across the six supporting strength themes.



The table in appendix 1 provides a fuller list clustered by the UK strength themes. Further evidence gathering and case study development will continue in 2009.

As part of this review we welcome new and interesting examples of the UK taking carbon mainstream, where UK capability has been applied to reduce carbon emissions

10 Conclusion

The world is on the edge of a dramatic transformation that will shape the way we live and do business. As the effects of climate change are felt over the world this transformation will accelerate. The UK is well positioned to design, facilitate and support this transformation internationally.

Promoting the UK's offer overseas requires coherent and consistent messaging targeted at selected high value audiences. Building awareness and perceived relevance with international audiences requires a coordinated effort across governments, agencies and industry. A clear proposition and message can be the foundation for such cohesive action.

The global transition to the low carbon economy is gathering pace. The UK has the technology and capability to help nations worldwide balance the desire for continued economic growth with the need for carbon reduction.

The marketing opportunity is to make the UK the global hub for low carbon economy solutions and present our offer such that UK businesses are able to develop and grow prosperous trade and investment relationships.

This document is simply a starting point for a programme of effective marketing overseas. However, it is essential that the UK's offer is accurate, compelling and clearly articulated.

The first quarter of 2009 will involve the gathering and integrating of feedback from this document, as well as the development of an implementation plan linking up with marketing partners (such as organisations across industry).

Many thanks for taking the time to consider this report. We welcome your comments and suggestions. Please forward your feedback to martin.whalley@ukti.gsi.gov.uk. We are seeking feedback by 5pm on 16th January 2009.

11 Appendix 1: UK proposition supporting examples

Partnership	Commercial	Innovation	Systemic	Influence	Range
BT	BHP Billiton	4Energy	Arup	B&Q	Carillion
BSI	Boots	Air Products	Atkins	BRE	Cogenco
Carbon Trust	Burntisland Fabrications (BiFab)	Cansermi	Ecomethane Group	Corus	Garrad Hassan and Partners
CBI	Carbon Disclosure Project	Ceres Power	ENGTFRAC	HSBC	ICCCA
Climate Care	Climate Change Capital	Connaught Engineering	IBM	M&S	Onzo
DEFRA Market Transformation Prog	Converteam	G24i	Isos Mori	Sky	
EEF	Crystalox	Geothermal International	Naturalwatt	Tesco	
Envirowise	Deloitte	Hydroventuri	Rftec	The Met Office	
Forum for the Future	Doosan Babcock	Imperial College	Serco		
Institute of Directors	Eversheds	Insensys	The Solar Design Company		
ITI Energy	Inetec	Intelligent Energy	YearRail		
Regenattec	Morgan Everatt	Jaguar Land Rover			
	Norton Rose	Kingspan			
	Npower	Lonira			
	Prologis	Metalysis			
	Rolls-Royce	Oxford Catalysts Group			
	ScottAsh	PML Flightlink			
	Sharp Manufacturing UK	Quantasol			
	Siemens Standard Drives	Quietrevolution			
	Solar Century	University of Surrey			
		Wavogen			
		Zedfactory			
		Zytek			