

Production Industries in London

Strategy and Action Plan
2005 – 2008

MAYOR OF LONDON

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Foreword



The production industries sector makes a vitally important contribution to the London economy. It is a £14 billion industry, employs 270,000 people, including those who are self employed, and embraces a wide range of individual sectors that reflect London's diversity, for example, print and publishing, engineering, electronics, chemicals and pharmaceuticals, food and drink.

This document sits under the new Economic Development Strategy which sets out my priorities for London and for the London Development Agency. Within this framework, it explains in further detail the Agency's plan of action for the next three years to help build a modern, sustainable production industries sector in London.

This publication follows the extensive consultation programme with businesses and partner organisations which the London Production Industries Commission completed in 2004. I am grateful to all those who contributed to the consultation exercise and who have played a key part in helping to shape the Strategy's priorities for action. Also, to all the Commission members who have devoted valuable time and effort to this and, particularly, to those who have stayed on to help oversee the implementation of the Strategy.

The sector's strengths and vital importance for economic prosperity counterbalance the misconception that manufacturing plays a marginal role in our economy.

However, these strengths do not attempt to disguise the problems of structural change which the sector has experienced in recent years and continues to face. The key issues which the Production Industries Strategy seeks to address should not be seen as threats, but rather as opportunities for our manufacturing businesses. We have many success stories, where companies are competing successfully, not only by cutting costs, but by adding value using innovation, higher skills, investment and good business practice to create goods and services that people want to buy. In pharmaceuticals, aerospace, biotechnology, electronics, automotive, the creative industries and food production, the best are world class. The challenge for manufacturing is for more companies to match the performance of the best, including a more efficient use of resources, through energy, water and waste management.

London possesses particular assets and opportunities which need to be harnessed more effectively to help our manufacturing base create and sustain competitive advantage. For example, Thames Gateway London is at the heart of the largest physical, social and economic regeneration programme in Europe and is designated as an Opportunity Area in the London Plan. It has significant development opportunities and is a focus for modern, technology based manufacturing.

We also have the knowledge, expertise and resources of our universities and research organisations which have the potential to develop a stronger role as specialist service providers of science and knowledge to businesses, both large and small. This is just one area that has been identified for action in the Strategy.

The Strategy will also make an important contribution to our overarching objective of achieving strong and diverse economic growth, recognising London's diversity as an asset. The LDA will foster this and ensure that Equalities are at the heart of all the actions undertaken under this Strategy, tackling any barriers to employment in this sector and ensuring access to disadvantaged groups in London.

The Production Industries Strategy for London provides us with a sound platform to work towards our goal of a prosperous and flourishing sector in London. Its emphasis is on practical action that will make a difference, bringing real benefits to London's manufacturers and, in turn, to our wider economy.

Ken Livingstone

The Mayor of London

1. Introduction

This document sets out a Strategy and Action Plan for building and sustaining a thriving, competitive production industries¹ sector in London. The Strategy comprises an overall goal for a modern, forward looking sector and specific actions which provide the basis for its implementation. The document also provides a picture of sector trends globally, a profile of production industries in London, and the key issues which the Strategy addresses.

The Strategy has been developed following the completion of the London Production Industries Commission's work programme in 2004. Its brief was to make recommendations to the London Development Agency on a Strategy and Action Plan to enhance the sector's competitiveness. The Commission operated as an independent body comprising senior representatives from manufacturing businesses, the design sector, higher education and the TUC.

The main drivers which provide the rationale for the Strategy are as follows:

- the new **Economic Development Strategy (EDS) : Sustaining Success** provides the framework for implementing the results of the Commission's consultation programme. It makes explicit reference to taking this forward under its Investment in Enterprise theme. Whilst the EDS is not prescriptive about which sectors to invest in, nor does it identify priority sectors, it seeks to support businesses that can secure improved productivity, greater social inclusion and achievement of environmental goals
- in many cases a sector wide approach will be the most effective way to do this. Different sectors have different needs, which may not always be reflected in

generic programmes. For example, collaboration through supplier development and best practice transfer schemes are often best achieved on a sector basis. Also, a sector approach has the potential to bring together disparate programmes, adding greater focus and coherence to delivery of support services

- prior to this the 2001 **Economic Development Strategy : Success through Diversity** made a commitment to establish a Commission to review the sector's position and frame recommendations to help strengthen its competitiveness
- at national level the Government underlined the importance of manufacturing to the economy by launching a **National Manufacturing Strategy** in 2002. It developed the strategy as a framework for action in collaboration with Regional Development Agencies (RDAs) and other partners. A review of the National Manufacturing Strategy was completed in Spring 2004. An updated action plan was launched in July 2004 and RDAs are playing a pivotal role in taking it forward.

The main focus of the Commission's work programme has been the publication of **Production Industries in London – Shaping the Future**, a consultation document which set out key issues affecting the sector and also outlined practical options for consideration to support its future development – in effect a White Paper for production industries in London. The document was published in October 2003 and circulated widely to businesses, partner organisations and Government.

The consultation period, which ended on 31st January 2004, took three forms:

- an interview programme with over 100 businesses in Spring 2003, carried out for the Commission by EEF South. The results of their work programme were reflected in the consultation document itself
- six consultation events with businesses during December 2003 – January 2004 : five on a sub-regional basis plus an event facilitated by the British Printing Industries Federation. Also, a trades unions' event facilitated by the Southern and Eastern Region TUC
- written responses from partner organisations and businesses.

The consultation document provides a more detailed analysis of production industries in London and key issues facing the sector. It can be downloaded at www.lda.gov.uk.

It is supported by a series of theme papers on key manufacturing topics, designed to improve understanding of key issues of particular significance for the sector's future development. The papers have been prepared by independent experts and are also available on the LDA website.

Details of Commission members and consultation respondents are shown at Annex One. Source documents that have assisted the preparation of the Strategy are shown at Annex Two.

¹ In the Strategy the terms 'manufacturing' and 'production industries' are both used. The former describes the range of activities associated with the design, production and sales of manufactured goods. The term 'production industries' is slightly broader, reflecting London's manufacturing, its supply chain and their growing inter-relationships.

2. Sector profile

OUTPUT

Manufacturing output in London totals some £14 billion and accounts for just over 8% of the regional economy. Up to 33% of London's manufacturing output is in print and publishing (28% of the national total), with engineering industries accounting for 16% of regional manufacturing output, followed by chemicals and pharmaceuticals and food and drink.

EMPLOYMENT

Manufacturing accounts for around 6% of total employment in London. The sector has 235,000 employee jobs, with a further 35,000 in self employment. Print and publishing accounts for 36% of the region's total manufacturing employment. As such, manufacturing employment in London has a greater concentration in one sector than is the case in any other region.

All of London's manufacturing sectors have lost jobs over the past two decades. The largest losses have been in engineering with 100,000 fewer jobs, followed by ICT and electronics (74,000 losses), and textiles, clothing and furnishings (59,000 losses). Print and publishing is the best enduring sector, falling by just 11,000 jobs since 1982, due to steady growth through the 1990s.

LABOUR PRODUCTIVITY

Whilst London's manufacturing employment base has contracted in overall terms, it has become far more productive in the use of labour. In the last two decades labour productivity has increased by around 120%. In London's two largest production industries sectors – printing and publishing, food and drink – output per

employee is estimated to be 30% ahead of the UK average and operating at a similar level of productivity to leading overseas competitors. The weakest of London's large sub-sectors is textiles and clothing, where productivity is below the national average.

SKILLS

Manufacturing in London relies on a more highly skilled occupation base than in Britain as a whole. The higher level occupations of managers, professionals, and associate professionals and technical occupations represent up to 50% of employment in London's manufacturing, compared with 35% at national level. Conversely, skilled trades occupations, and plant and machine operatives account for 28% of London's manufacturing jobs, but 46% of Britain's manufacturing jobs.

London is home to many business headquarters. As such, many 'manufacturing' jobs in London, in all manufacturing sectors, are not part of the production process, but are in offices as management and administration. Managerial and administrative occupations account for up to 33% of employment, whilst production operatives account for 28%.

BUSINESS STOCK

The sector is dominated by small and medium sized firms who account for over 90% of employment. The numbers of manufacturing firms registered for VAT in London was just over 18,600 at the start of 2004 – a reduction of 13% over a five year period. The decline in stock is characterised by a decrease in the number of registrations in manufacturing. The number of deregistrations has

remained comparatively stable, at around 2,300–2,500 each year. Print and publishing is the only sector of manufacturing in which the VAT stock has increased. It now accounts for 40% of London's VAT registered manufacturing companies.

SUB REGIONS

Manufacturing is fairly dispersed across London, reflecting its dominance by small firms (in terms of numbers of establishments). There are however, concentrations in certain parts of London:

- **Thames Gateway** – Thames Gateway London has approximately 5,000 manufacturers operating locally, primarily SMEs. A number of sectors have strong links to the London market, for example, print and publishing, clothing and food processing. High quality development sites are being brought forward at Dagenham, Rainham, North Bexley and within the Stratford Arc of Opportunity to maximise the scope for attracting in modern manufacturing to the area
- **West London** has a modern business, manufacturing and service economy focused on the Heathrow corridor. Park Royal comprises the largest single industrial and business location in the London region and currently has 10,000 manufacturing jobs in around 270 businesses, representing 25% of total employment in the area and 14% of the total number of firms. Growth sectors include food processing and ICT. The print sector is also well represented

2. Sector profile continued

- **South London** – the south London economy is centred on the string of major town centres which ring the outer area – amongst which Croydon is pre-eminent – and by the continuing role of the Wandle Valley which is home to a broad range of manufacturing, including a significant amount of activity in the print sector
- **North London** represents a major employment development area and the Upper Lee Valley has strategic importance to London's manufacturing economy. Major projects now being developed at Innova Park, Picketts Lock and Tottenham Hale offer a broader base from which to attract new investment to the area. There is a concentration of clothing sector businesses locally with significant black and other minority ethnic employment.

FORECASTS

Forecasts for the sector in terms of employment and output present a mixed picture. Job cuts are expected in most manufacturing industries, reflecting restructuring and productivity improvements. Employment projections which form the basis of economic and planning policy in London and which have been prepared for the London Plan anticipate that manufacturing employment in London will fall by 30% between 2002 and 2016 – from 285,000 to 199,000.

At national level the Institute of Employment Research's (IER) forecast for 2000–2010 predicts that manufacturing output will grow by an average of 2.1% per annum between 2000 and 2005 and by 2.5% between 2005 and 2010. The IER forecasts this growth to be underpinned by strong performance in high technology and R & D related sectors.

Companies with strong investment in R & D, for example, pharmaceuticals, biotech and food processing sectors are expected to show the strongest all-round performance.

Conversely, the IER has predicted weaker performance amongst labour-intensive, price-sensitive sectors, such as textiles, clothing, leather and metals.

A recent study of UK manufacturing by the Institute for Public Policy Research concludes that, whilst manufacturing employment will continue to shrink, this is compatible with growth in manufacturing output, rising prosperity, and employment growth in London as a whole. Their assessment is that the aim should be, not for larger, but for more successful manufacturing that is knowledge intensive and highly skilled.

3. Sector trends

The production industries sector is operating within an environment that has changed rapidly during the past ten years or so. This has presented significant challenges, opportunities and threats and will continue to do so as the pace of change forces the sector to rethink the way in which it does business. DTI's Manufacturing 2020 Foresight Panel has undertaken an assessment of global manufacturing trends to help identify and stimulate the action needed to sustain a strong and globally competitive UK manufacturing sector in 2020 and beyond. Their work has been instrumental in identifying key drivers for change. These global trends will apply in different ways and to varying degrees to London's production industries sector.

The Strategy and Action Plan will seek to help businesses keep pace with these trends and ensure that the challenges they present can be converted into real opportunities for growth:

- **global markets** : rapidly developing information and communication technologies has made the world a much smaller place, with markets open for business 24 hours a day. The globalisation of products and markets raises many issues for manufacturers, for example, is it appropriate to target global markets and, if so, where should they be targeted from?
- **access to markets** : the United Kingdom is part of the world's largest single market as well as being one of the world's most open trading nations, with a culture of accessible, competitive markets and conformance with legislation. The EU's enlargement means that the Single Market has increased in size yet further. This creates market opportunities but

increases the threat from more competitive trading nations

- **location** : locations such as South East Asia, the Indian sub-continent and Central and Eastern Europe are able to offer a combination of low wage costs and improving skills levels. Combined with this, developments in information and communications technologies have made it easier to manage a geographically dispersed group of operations and have given manufacturers greater freedom of location (offshoring). As these nations, in turn, advance, their capability of competing further up the value chain increases. However, the corollary of this trend is that the rise in prosperity in other parts of the world, notably South East Asia, will create a growing and more sophisticated customer base for UK manufacturers
- **innovation** : suppliers are having to become more imaginative and innovative in response to more sophisticated consumer expectations as customers demand, not just low prices, but high quality, good design, effective and responsive customer service. Technologies and techniques associated with agile, lean and remote manufacturing and a just-in-time supply chain are used to produce, at high speed, differentiated products tailored to the demands of individual customers – the concept commonly referred to as ‘mass customisation to a unit of one’
- **skills** : knowledge has increasingly become a critical source of competitive advantage. It is creating a stronger demand for people who are adaptable and have high occupational and technical skills and is

reducing demand for people with low skills. Comparative advantage is likely to be dependent on a continuing shift towards higher value activities requiring higher levels of skills

- **e-commerce** : the rapid development of information and communications technologies is forcing manufacturers to re-evaluate their business models and to embrace e-commerce to market, sell, communicate and trade, using alternative methods to those traditionally employed. Incorporating sophisticated IT into processes, managing higher volumes of data and increasing speed of communication all offer scope to make significant gains in productivity
- **supply chains** : as competition increases, customers at all levels of the supply chain can be more demanding and exacting. Also, the Internet increases the transparency of the supply chain and puts more pressure on prices. Companies have to take advantage of the opportunities offered to cut costs throughout the chain, and to be responsive to customers as a co-ordinated supply chain rather than as individual companies. This means that they need to establish closer and more collaborative relationships with companies up and down the chain
- **environmental sustainability** : greater awareness of environmental issues, compliance with environmental regulations and sustainable manufacturing are not just moral issues for companies, but also, potentially, features which differentiate them commercially from their competitors. Consumers are increasingly demanding more than a product – many look more

closely at the company and what it stands for, for example, overcoming the ‘throw away’ mentality, reconfiguring products to be more environmentally friendly

- **manufacturing as a service** : lifecycle costs are becoming increasingly important as business models change to provide services rather than products, for example, selling the ability to transport individuals rather than selling a car. Businesses need to be more conscious of operating and disposal costs as well as initial production and supply costs. The distinction between manufacturing and services has become increasingly blurred – no longer is service seen as something outside the realm of the manufacturer; rather, manufacturing is becoming the provision of complete service over the whole product lifecycle. This requires manufacturers to get closer to their customers and to be more responsive to their needs.

4. Key issues for production industries in London

Production industries in London face a wide range of issues and challenges in today's increasingly competitive environment. Some of these are 'external' to the business and are the subject of sustained and well-argued lobbying from the industry's representative organisations, for example, fiscal policy, exchange rates, transport and communications. Many are 'internal' where businesses themselves have the opportunity to take the initiative to drive through change.

The key issues which the sector faces are summarised below. They are a combination of those that have been fairly well documented at national or regional level and issues highlighted during the Commission's consultation programme.

The issues are characterised by their inter-connectedness – improvements in one area often flag up a requirement for improvements in another; for example, introducing new, more innovative approaches to product and process development often means investment in upskilling key staff in order to capitalise on exploiting new market opportunities.

SKILLS AND WORKFORCE DEVELOPMENT

Manufacturers under-invest in training when compared with the rest of the economy. However, whilst a very large proportion of small firms provide no training at all, those that do train undertake as much proportionally as larger firms. Most of those who do no training at all are generally absorbed with surviving from day to day and are therefore difficult to engage.

In recent years the London Skills Forecasting Unit has carried out detailed research into a number of sectors, including production industries, to identify emerging trends. During this work programme a number of common themes emerged about the way in which skills requirements are changing. These skills needs include customer care, ICT, product assembly, management and team working. Although precise requirements vary slightly from sector to sector, they are significant for their broadly generic, cross sectoral characteristics.

The London Skills Forecasting Unit concluded that traditional barriers between disciplines and occupations are breaking down. Increased expectations have been placed on the workforce with multi-skilling and team working becoming standard practice. The demand for specialists in one trade has been replaced by a demand for employees who offer several skills, but not necessarily to the same depth as the traditional craftsman, for example, the ability to work across the craft/technician boundary.

The Commission's consultation programme identified a number of skills issues of specific concern to the sector which need to be addressed. These include:

- the importance of changing the mindset of employers towards management and workforce development, in effect, stimulating a culture change
- ensuring that the sector does not lose the skills of experienced workers as firms shed staff or close down, whilst, at the same time, other firms are recruiting staff in line with expansion plans

- the need to tailor Apprenticeship schemes more to accommodate the needs of employers, particularly smaller ones
- the importance of training within the manufacturing environment to offer smaller firms a more flexible solution to workforce development.

INNOVATION AND DESIGN

Innovation is a vital ingredient for improved competitiveness and productivity within the sector. It is a multi-faceted issue that is not limited to high technology products and processes. It embraces skills, investment, management culture and best practice.

Improved commercialisation of products and services, better product and market diversification and a greater focus on product design to increase quality and differentiate from competitors are all acknowledged as critical success factors in improving innovation performance to create competitive advantage.

Although manufacturing invests more in R & D than the rest of the economy – around 75% of commercial R & D in the UK is undertaken by the sector – it still spends less on developing new products than manufacturers in competitor countries. London has tended to under perform on key indicators of innovation and technology. For example, businesses spend comparatively little on R & D as a percentage of regional GDP – half the UK/EU average of approximately 1.2%. Patent applications are similarly below the UK average.

Many companies associate innovation solely with product development and technology, ignoring the human aspect in terms of inspiring, motivating and organising staff as well as innovation in marketing and delivery mechanisms. Research from a variety of sources shows that key enablers for innovation are principally internal, for example, creating the right business culture, having a positive attitude towards risk and greater integration of functions both within the business and within the value chain.

Innovation performance will be enhanced by improved recognition of the opportunities which it presents and the benefits it brings. The best manufacturers match the best in the world in new product development, innovative production processes, marketing and services – all the elements of the increasingly complex value chain of manufacturing. Companies with high R & D investment, like pharmaceuticals, life sciences and the food processing sector, are the most successful all-round performers. Far more companies need to match the performance of the best.

In addition to the strong science and knowledge base within its universities, colleges and research organisations, albeit not fully exploited, across London, there are important emerging clusters of activity with international reputations. These include sectors such as life sciences, pharmaceuticals (closely linked to some of the world's best teaching hospitals and medical schools), and creative industries such as art and design, media and software development. London has particular strengths in product design which need to be harnessed more effectively by manufacturers to create added value and improved profitability and competitiveness.

The results from the Commission's consultation programme demonstrate that stakeholders see innovation as a key area for action, but are concerned to see activities associated with it tackled in a way that has real meaning for manufacturers, particularly SMEs. As a catch all term, many SMEs do not relate easily to innovation. They may identify more readily with terms such as product development, technological innovation, R & D, process innovation. Also, innovation needs to embrace management practices.

New technologies offer significant benefits to stimulating innovation but also underline the threat to competitiveness if manufacturers fail to invest in them as rapidly as other countries. However, many firms have recognised the benefits of introducing rapid prototyping, or adopting agile, lean and remote manufacturing techniques and the technologies and systems that drive them to increase value added in manufacturing processes, reduce waste and enable mass customisation of products.

LABOUR PRODUCTIVITY

Labour productivity is 25% higher in manufacturing than in the rest of the UK economy. Also, as already outlined, labour productivity in key London manufacturing sub-sectors is consistently higher than in other UK regions. However, these headline statistics disguise some equally important facts:

- there is a substantial productivity gap when compared to our overseas competitors. In manufacturing, output per hour is 55% higher in the US than in the UK, 32% higher in France and 29% higher in Germany

- large firms are generally more productive than smaller firms.

The productivity gap is both a challenge and an opportunity. Assisted by new technology advances, production industries are amongst those well placed for productivity growth. To improve productivity, a manufacturing firm must increase the value of the goods it produces per employee – in other words, it must improve its competitiveness to succeed in the marketplace. Success depends not just on cutting costs, but on continually creating goods and services that people value and want to buy, using innovation, investment and good business practice. This is what successful manufacturers are doing. In pharmaceuticals, aerospace, biotech, electronics, automotive, the creative industries and food production, the best are world class.

Managers of small firms often do not perceive that productivity is a problem. They may not be aware that it can be the root cause of lack of new business or aware of productivity differences within their own sector. The Manufacturing Advisory Service is helping firms address these particular issues. More managers need to be persuaded that tried and tested methods to improve productivity exist.

ADDING VALUE

As a nation, if we could reach the average manufacturing performance of the US, Germany and France, and other things remained equal, value added in manufacturing would be more than £70 billion higher. This has obvious implications for competitiveness, economic prosperity and jobs.

4. Key issues for production industries in London continued

Some manufacturers have redefined their way of working and identified opportunities to create added value and improve their productivity as a result. As outlined earlier, the distinction between manufacturing and services has become increasingly blurred – no longer is service seen as something outside the realm of the manufacturer.

Opportunities exist for manufacturers with the potential to move up the value chain and embrace knowledge based opportunities and technologies. Also, for those who are keen to move into highly customised product areas that require close links between the supplier and user. Such products may be made cost-effectively in London, even with its relatively high wages.

ACCESS TO MARKETS

▷ Public sector procurement

A key issue to emerge from the Commission's consultation programme is the importance of helping manufacturers to compete in the sizeable public sector procurement market. This reinforces the significance of the cross Departmental programme which is being co-ordinated by the Office of Government Commerce (OGC).

The areas where the public sector has the most significant impact quantitatively are IT (services and systems), construction (in both of which the public sector accounts for a considerable proportion of total demand) and professional and other business services. The OGC work programme aims to establish how a more level playing field can be created, so that smaller firms can gain a fair share of the public sector marketplace, both by competing for public sector contracts and by participating in the supply chain. The work programme seeks to address a number of issues:

- opportunities are perceived as inaccessible. SMEs find it resource intensive and expensive to search for them
- SMEs often do not know whom to talk to about opportunities and find it difficult to raise their profile with the large number of potential public sector customers

- there is a strong perception amongst SMEs that the bidding process is long, complex and costly. Those new to the public sector market may not know what is involved, may have difficulty in understanding requirement documents and therefore in constructing good quality proposals or tenders
- SMEs may find that the contracts advertised are too large for them to bid for. As a result, they may be virtually excluded unless prime contractors take active steps to open up their own supply chains.

▷ International trade

International trade is an important economic activity for London, generating wealth, encouraging productivity and creating employment. Although London performs well in international trade markets, there are clear divisions within the region that need strengthening. Research evidence in support of the Regional International Trade Strategy for London (2002-2006) shows that London has around 15,000 active exporters and 30,000 who export occasionally. This means that only 5% of London's firms are actively involved in international trade.

Although a large number of companies that don't export will not have goods or services that can be exported, it is reasonable to believe that there are a significant number of firms that are failing to achieve their full international trading potential.

The main reasons for this include:

- not enough exporting knowledge, market-entry advice and information
- a lack of understanding of the available international trade services, both public and private
- not enough skilled staff, particularly those with management and technical skills, to develop international markets
- limited access to appropriate finance
- a poor understanding of international trade opportunities
- a belief that there are enough opportunities to trade in the domestic market.

SITES AND PREMISES

Manufacturing has become increasingly mobile and firms have many options on where to locate, both within the UK and internationally. Feedback from the Commission's consultation programme indicates that businesses seeking to grow are moving out of London to locations beyond the M25, due to a lack of suitable premises in a range of sizes and types. The availability of suitable premises is constrained in many cases by opportunities to bring forward land for development. There are a number of issues which confront manufacturers:

- the availability of sites to meet the needs of modern manufacturing
- the provision of affordable, fit for purpose premises for start-ups, inward investors and businesses seeking to expand
- the physical environment on industrial estates where many manufacturers operate and the need to improve their appearance and security
- the planning regime and the need to strengthen links between local authorities and manufacturers to address issues of concern.

The Mayor's London Plan highlights the significance of protecting and enhancing strategically important employment sites and premises, the modernisation of existing industrial areas, and the continued supply of good quality low cost premises for small businesses. There is a shortage of sites in a 'ready to go' state for business expansion and inward investment. Further business park accommodation is needed within the urban area to compete with locations outside Greater London, which are less accessible to London's workforce.

SECTOR IMAGE

Manufacturing continues to suffer from a negative image, particularly among young people entering the labour market and considering career opportunities. As older workers retire, this combination squeezes the sector's employment and skills base at both ends and creates significant problems in terms of labour market recruitment and skills shortages. There is a lack of awareness and understanding among students, teachers, careers advisors and parents of what a modern production industries sector looks like and the potential it offers for rewarding career progression. Many people see manufacturing as noisy and dirty and a relic from the days of smokestack industries.

Engineers are not held in high regard, a particular problem for London with its strong service sector economy and where, for example, the advertising and financial services sector present, on the face of it, more exciting and rewarding opportunities for young people. This is in contrast to other countries, for example Germany and the US, where engineering is seen as a high status professional occupation. An estimated 75,000 to 100,000 Chartered Engineers will retire in the next 10-15 years and yet only about half that number are expected to embark on a new career as a Chartered Engineer in that time. There is also a particular need to attract more women into engineering. Whilst numbers have grown over the past 20 or 30 years, the proportion of women in the main engineering occupations is still very low.

4. Key issues for production industries in London continued

Information and manufacturing technologies have made a significant transformation to production industries, for example, IT has transformed customer/supplier relationships, underlining the need for highly skilled, computer literate professionals who can manage sophisticated supply chains. Also, the design, innovation and product and process development aspect of professional engineering calls for well qualified engineers who are multi-skilled and capable of complex problem resolution.

Whilst the modern face of manufacturing has undoubtedly changed, its image has not kept up with this change. This message needs to be reinforced with a wide range of key target groups which include policy/decision makers in the public sector, the media, students, parents, teachers, careers advisors and investors. This is recognised as an important priority also at national level.

Industry itself has an important role to play in helping to change perceptions; more self-promotion is needed, and companies need to engage more with the education sector.

COHERENCE OF SUPPORT

Manufacturers have frequently complained that there is a plethora of support programmes which they find confusing and difficult to access. They are concerned about the number of delivery organisations involved and the extent to which support is directly relevant to their needs.

These are not new issues, nor are they confined to production industries. The coherence and quality of support for the sector have important cross-cutting implications for the key issues which it faces. They form an integral part of the Strategy and require action to bring greater clarity to sector support activities.

5. Strategy framework

The framework for the Strategy comprises the following:

- an overall goal for helping to build a competitive, sustainable production industries sector in London, with an aspiration for what the sector will look like in 2008
- a clearly defined target market for the activities which the Strategy encompasses
- performance indicators against which the Strategy's achievements can be judged.

GOAL

Our overall goal is to:

strengthen the competitive performance of the established manufacturing base and improve opportunities for its retention in London. We will do this by helping to build a knowledge intensive, high value added production industries sector which leads to greater wealth creation and sustainable employment opportunities; a sector which has access to a highly skilled workforce and has an acknowledged reputation for levels of innovation, productivity and adoption of good practice.

Our aspiration for production industries in London in 2008 is a sector which has the following characteristics:

- higher levels of investment in workforce development and stronger levels of demand for learning and skills support
- improved awareness and application of innovative working practices across all areas of business operations

- increased productivity levels
- better access to public sector and international trade markets
- access to an improved infrastructure of sites and premises, particularly on industrial estates, to support a modern, forward looking sector
- a more positive image among young people, with excellent prospects for career progression for labour market entrants.

TARGET MARKET

Small and medium sized firms are the main target market for the Strategy. As around 89% of London's manufacturers are defined as small, this will allow a more proactive approach to be used to target the much lower number of medium sized firms.

The approach to segmenting the market is a balanced one that seeks to make the best use of available resources. A three-pronged approach will be used:

1. proactive targeting of medium sized firms that have the capacity and desire to implement change
2. sub-sector targeting to ensure that those sectors that should be thriving in London do so – this will also allow prioritisation of firms identified in (1)
3. provision that meets demand so that those that request support and demonstrate growth potential (viability of company and of products), regardless of size or sub-sector, are not excluded.

PERFORMANCE INDICATORS

The Strategy needs to have a set of performance indicators that can demonstrate the extent to which its main objectives have been achieved as well as provide an assessment of the general health of the production industries sector in London.

A series of key performance indicators have already been identified for the National Manufacturing Strategy. They provide an overview of the climate for the UK's manufacturing sector, are measurable over time, allow continuity and annual updating and can provide an international comparison of the UK's performance. Their aim is to provide an 'at a glance' view of the current state of manufacturing.

The same set of indicators will be used for the Production Industries Strategy in London. This will enable London's performance to be benchmarked against other regions and the UK as a whole. The indicators cover the following areas:

- output – showing the level of value added
- investment – showing levels of new investment
- innovation – using R & D expenditure as a proxy for innovation in the sector
- productivity – using labour productivity as a proxy for total productivity
- skills – showing qualifications held at different levels by the workforce.

In addition to this, monitoring and evaluation of activities associated with the Strategy's Action Plan will enable stakeholders to gauge how effective it is in addressing the key issues facing the sector. Customer feedback and survey data will serve as an important adjunct to statistics on the general health of production industries in London.

6. Taking the Strategy forward

The Commission's proposals for the Production Industries Strategy and how it should be taken forward were endorsed by the LDA Board at the end of March 2004. Since then good progress has been made on implementation plans, in particular:

- developing a strong partnership approach to working with the sector to ensure that it derives maximum benefit from external support activities
- the establishment of stakeholder Working Groups to develop an action plan to help sustain a competitive and thriving production industries sector
- various elements of the Action Plan are currently being taken forward by Project Managers, recruited specifically for this purpose by the LDA.

WORKING IN PARTNERSHIP

Our approach to taking forward the Strategy is characterised by a strong partnership approach. For example, close links are maintained with national stakeholders actively involved in the Government's **National Manufacturing Strategy**. This is consistent with the overall approach to implementing the Economic Development Strategy (EDS), which recognises that effective partnership working is the only way to deliver success.

Whilst the Production Industries Strategy comes under the EDS, it has important linkages with **other regional strategies** in terms of key issues to be addressed and exploiting opportunities for joint action. We are working closely with a wide range of partner organisations where shared objectives exist and where there is scope to achieve greater synergy through collaboration.

Notable examples are:

- the pan London approach to skills and workforce development support activities set out in the **Framework for Employment and Skills Action (FRESA)** which operates under the auspices of the London Skills Commission. The FRESA provides the structure and process by which London Skills Commission partners identify the priorities and objectives for the region and take them forward. The FRESA is neither a new programme nor an additional strategy, but rather a tool to help partners work together. As part of the FRESA's implementation, seven themes were initially identified in order to develop priorities for action and jointly planned initiatives. These are termed FRESA Flagship Programmes. A FRESA Flagship Programme for Production Industries forms part of the overall suite of programmes. In practice therefore, the skills and workforce development priorities in the London Production Industries Strategy provide the content for the FRESA Flagship Programme for Production Industries
- a range of partner organisations from the public, private and education sectors are working closely with the London Development Agency on the implementation of the **London Innovation Strategy and Action Plan (2003 – 2006)**. One of this Strategy's key aims is to harness London's world class knowledge base to benefit London's businesses. The important link with the Production Industries Strategy is to utilise more effectively the knowledge, assets and expertise within London's higher education institutions and research and technology organisations to assist manufacturers.

- **The Regional International Trade Strategy** provides a framework for key stakeholders involved in international trade support to co-ordinate efforts to help London firms achieve their full potential in international markets. These stakeholders include UK Trade and Investment, the London Development Agency and the London Chamber of Commerce and Industry.

Its strategic priorities are directed at skills development, provision of high quality information and advice, a strong trading environment, specific international strategies for London's high growth sectors and improved partnership working. High value manufacturing has already been identified as a growth sector.

BUILDING ON OUR STRENGTHS

A key feature of the Strategy is to build on existing support for manufacturers. New initiatives are being introduced only where there are identified gaps in current provision. Existing initiatives or programmes that are demonstrating success form a core part of the Strategy and will be enhanced, where necessary, to strengthen provision yet further. In some cases this may entail modifying existing support to give it a stronger production industries sector focus.

The Manufacturing Advisory Service (MAS) which was introduced in 2002 forms a cornerstone of the Production Industries Strategy. MAS is part of a national service providing practical hands-on advice by specialists to help small and medium sized manufacturers improve their productivity and competitiveness. The specialists are

managed by EEF South on a day to day basis and work in conjunction with Business Link for London advisors, combining the manufacturing and small business expertise of the two organisations.

MAS helps firms introduce best manufacturing practices, processes and technologies through a range of services, for example, on site advice, follow-on consultancy, training events and best practice visits.

WORKING GROUPS

Four Working Groups were established in 2004 to oversee the development and implementation of the Action Plan. The Groups comprise Commission members, manufacturers and partner organisations. They are supported by the LDA who provide them with a secretariat and Project Managers whose task is to ensure that the Action Plan is implemented effectively and monitored regularly.

Activities are broken down between the four Groups as follows:

- skills and workforce development
- innovation and design
- access to markets
- productivity, sites and premises, sector image and improving the coherence of service provision.

The Groups have made excellent progress in formulating specific interventions to support the sector's future development. They do not work in isolation from each other – an important feature of the key issues which they are tackling and the actions which arise is

their ability to interconnect. Therefore the Groups are working in effect as a team to ensure that actions are closely co-ordinated.

As the Strategy moves increasingly from project development to programme delivery, the Working Group structure will be reviewed to ensure that it provides the most appropriate and effective mechanism for managing implementation.

IMPORTANT THEMES

A number of important cross cutting themes have emerged from the Working Groups' discussions to date. These are helping to shape the action plan:

- the need to improve **communications** across the sector, for example, to include:
 - access to public sector initiatives
 - details of public sector contracts
 - details of business support organisations and their services
 - information on universities' assets and expertise
- **co-ordinating** more effectively activities and initiatives aimed at manufacturers and related businesses in London to bring greater cohesion to support for the sector. This role is already being performed to some extent by the London Business Support Network (LBSN), which is co-ordinated by Business Link for London. LBSN brings together the main providers of business support in London. However, there is scope to develop a more production industries sector focused approach

- encouraging companies to increase the momentum of **culture change** in their organisations so that they become more innovative, productive, competitive and profitable, for example, through a greater focus on enhancing management skills and developing supply chains.

ACTION PLAN

The Production Industries Strategy is a long term plan for change. Many issues are complex and far reaching, with some requiring a change of direction from previous practice. The cross cutting themes help to link together, not only the priority areas identified during the consultation programme, but also the individual elements of the Action Plan. An overview of the Action Plan is shown on page 17. It has a number of important characteristics:

- some actions are already well advanced, others require more developmental work before they can be fully implemented
- it does not make sense, nor is it feasible to tackle the priorities for action all at the same time. Therefore, a phased approach to their implementation is being adopted, balancing the work needed on longer term issues with some shorter term actions capable of showing early results
- in most cases a direct, interventionist approach is being taken to implement specific actions; however, in some cases a lobbying role is more appropriate to press for change, for example, making Apprenticeship Programmes more flexible to meet the needs of smaller firms

6. Taking the Strategy forward continued

- the actions set out on page 17 are colour-coded to draw a distinction between:
 - existing support activities for which enhancements are planned
 - activities that are under development
 - activities where a lobbying role is appropriate, rather than direct intervention.

The Action Plan is not an exhaustive list of all the support activities that focus on production industries. It concentrates on those areas where new activities and enhancements to existing activities will be taken forward. There are many other examples of sector initiatives that continue to address important issues, for example, the Education Business Partnerships' Making Your Future Programme which helps to improve teachers' understanding of manufacturing.

Further information on Action Plan and partnership activities can be found on a number of websites or obtained from the LDA (see Annex Three).

CURRENT PRIORITIES

The approach thus far has primarily been to build on current support activities and enhance them, where appropriate; also, to concentrate on a small number of pan London high impact programmes, rather than a proliferation of small, localised and potentially less useful projects.

Over the next three years the LDA plans to invest over £15 million to support implementation of the Strategy. However, an important aim of the Strategy will be to lever in funding from other sources to augment this investment. Action Plan details are being worked up in terms of scale of activity, levels of investment and timescales. In the coming months we expect to take forward a number of priorities for action that address key issues relating to skills and workforce development, innovation and design, productivity, sites and premises, and the sector's image. In particular, we will:

- introduce a number of enhancements to the **Manufacturing Advisory Service (MAS)**, for example, provide clients with longer term interventions and integrate the service more closely with related support activities. MAS has nearly completed its first three years of operation – in common with other regions it is currently going through the re-contracting process for the next three years of activity. This will take effect from Spring 2005

- take forward a pan London **Manufacturing Competencies Retention Programme**, building on the SRB funded programme which has been operating for a number of years. The Programme helps to ensure that key manufacturing skills are retained and redeployed within manufacturing as the sector continues to respond to structural change. A range of support services are available to help firms facing closure or who need to release staff, and to assist firms recruit the skilled staff they need in order to take forward expansion plans
- strengthen the existing **Estates Development Programme** which will take the best elements of the different approaches to deliver estates improvements across London, based on the successful but varying models that have been developed and taken forward. The Programme's Industrial Estates Officers (IEOs) act as a vital conduit, engaging with manufacturers so that they can identify and address issues of major concern, for example, physical environment, security. They also perform a brokerage function, signposting businesses to appropriate service provision, available through the London Business Support Network
- enhance the **Sector Development Programme** which supports the development and production of innovative products, processes and technologies in a number of sectors (furniture, light engineering, food, clothing). The Programme encourages companies to look at new ways of attracting more customers, from either existing markets or from new markets, through new product development. The Programme will identify and disseminate good practice more widely

and seek to broaden its coverage to include other manufacturing sub-sectors

- review the **Design Immersion/Design Matters** pilot initiative towards the end of the pilot period to assess performance and determine how it might be rolled out more widely. The Programme is managed by the Design Council on behalf of DTI and the LDA. Design Immersion gives consumer goods manufacturers access to intensive support over a twelve month period from the UK's leading design experts. Design Matters is a scaled down version providing support from design experts and a mentor over a three month period
- establish a London base for **The Year in Industry (YIN)**, a national initiative operating under the auspices of the Royal Academy of Engineering which provides placements in companies for students before they take up university studies. YIN currently operates only on a limited basis in London. A physical base will enable it to scale up activities and achieve greater reach and impact
- enhance the **Supply London Programme** which assists SMEs to improve their supplier capability and compete more effectively for public and commercial sector contracts. This will be achieved through the introduction of a Business Intelligence Unit. The Unit will provide London SMEs with information on opportunities arising from major development projects, together with access to appropriate support programmes. Alongside this Supply London will continue to deliver a programme of advice and mentoring to help SMEs build capacity and expertise
- identify opportunities to extend the range of support activities available through the **London Apparel Resource Centre (LARC)** at the Florentia Clothing Village in Haringey. LARC is a recognised fashion sector hub for designers and manufacturers, providing workspace and training support for small businesses. Options for enhancing its activities include the provision of additional incubator units, practical workshops on key topics such as lean manufacturing, supply chain management and additional specialist training to improve vocational skills levels.

FUTURE PRIORITIES

Other areas for action are currently under development and will be worked up in more detail during the next twelve months. These are mainly, but not exclusively, new initiatives that will meet identified gaps in provision.

To support **skills and workforce development** related activities, future actions will include:

- provide corporate strategy and mentoring support for 'middle market' firms with the capacity to become major international companies
- a sector focused management and leadership programme for senior managers
- support the British Printing Industries Federation to establish a Sector Skills Council for the print sector
- in conjunction with national partners, identify the scope for Apprenticeship Programmes to be made more flexible.

6. Taking the Strategy forward continued

To support **innovation and design** related activities, future actions will include:

- assess the scope to roll out the New Product Development Programme across London. This has operated as a pilot initiative in London Riverside and has provided action based consulting support to assist manufacturers to investigate new product development opportunities
- extend the coverage of LondonAssets4Business, a web-based database of asset based services within universities, government laboratories etc. which are available to London businesses in the production industries and service sectors
- examine the potential to establish an Innovation Standard that recognises good practice in innovation, operating along similar lines to the Investor in People standard.

To support London MAS activities aimed at delivering improved **productivity**, future actions will include:

- the development of a pan London lean programme to offer more intensive support than MAS is able to provide on the adoption of lean manufacturing techniques and tools
- the establishment of a Lean Learning Academy at the Centre for Engineering and Manufacturing Excellence at Rainham. The Academy's aim is to broaden the understanding and application of lean in its widest sense – principles, tools and processes.

To support **market development** related activities, future actions will include:

- close collaboration with UK Trade and Investment to develop a more bespoke sector based approach to the provision of international trade services
- develop a 'road map' for small and medium sized manufacturers on how to approach the public sector procurement market (building on Office of Government Commerce initiatives)
- work with other RDAs to explore opportunities to encourage inter-regional trade.

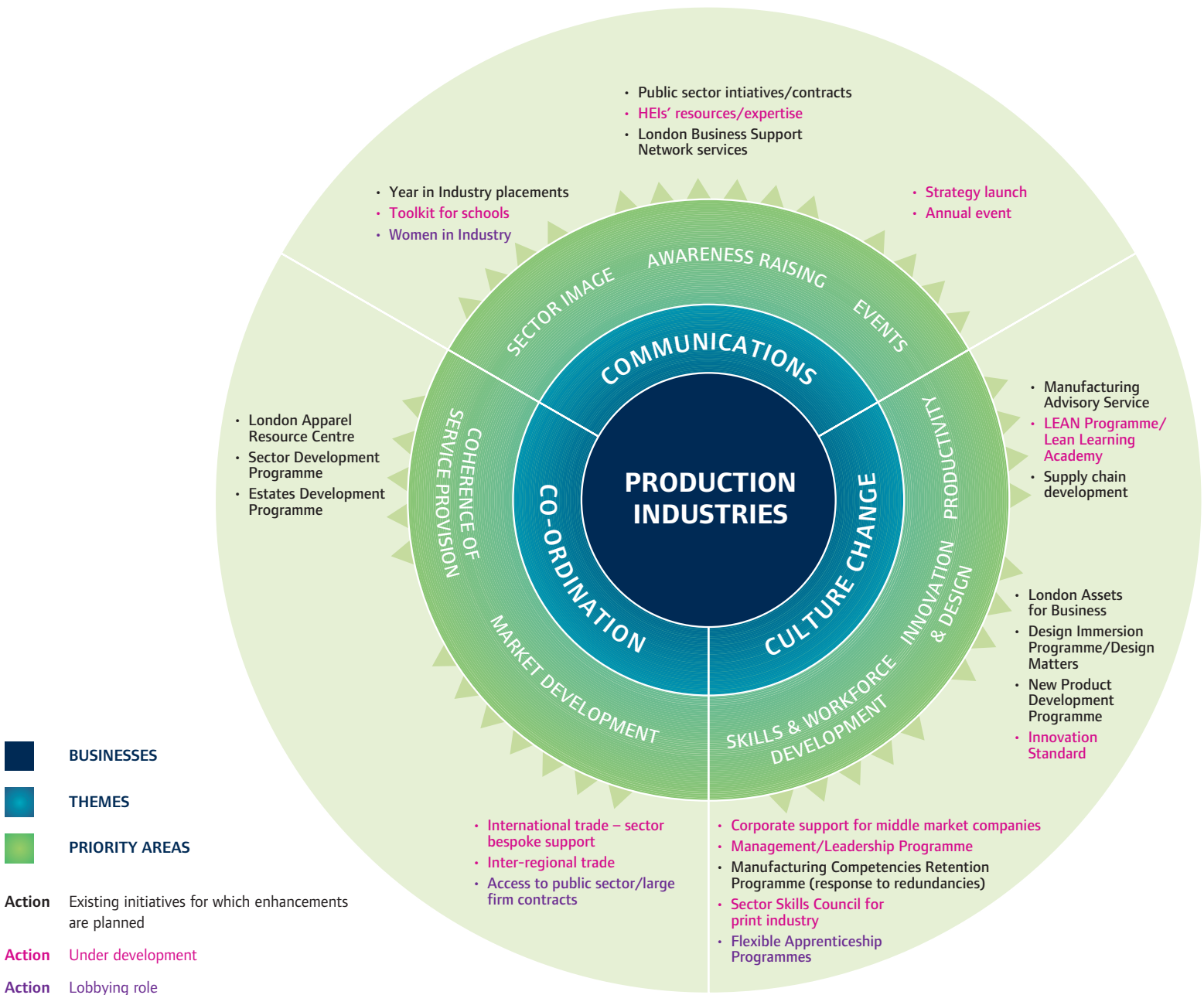
To support **sector image** related activities, future actions will include:

- work with central Government, Sector Skills Councils and Trade Associations to develop a toolkit for schools to promote manufacturing and encourage 14-18 year olds to consider work opportunities in production industries
- identify how best to encourage more women to pursue career opportunities in the production industries sector.

To support the cross cutting objective of **improving the coherence of service provision**, as well as strengthening communications activities, future actions will include:

- working closely with organisations in the London Business Support Network to determine how best to improve manufacturers' understanding of business support, public sector contract opportunities and access to specialist expertise
- as part of this, map the initiatives and links between higher education institutions and businesses to assess their relevance to the production industries sector and how they could be strengthened.

As implementation of the Strategy continues, stakeholders will be kept up to date on developments through regular progress reports. Also, an annual event will be organised to present progress achieved during the previous twelve months and priorities for the following year.



Annex One

LONDON PRODUCTION INDUSTRIES COMMISSION

1) Details of Members

W.L. Chip Boyd	Managing Director, Voith Turbo Ltd
Des Brennan	Sales Director, Copyprint UK Ltd
Alan Coates	Chair, Park Royal Partnership
Mick Connolly	Regional Secretary, Trades Union Congress, Southern and Eastern Region
Francis Davis	Managing Director, Cantate Print and Communications
Professor Michael Gregory CBE	Head of Institute for Manufacturing <i>and</i> Manufacturing and Management Division, Department of Engineering, University of Cambridge
Cliff Hardcastle OBE	Formerly Chairman, Denistron
Robert Herritty	Public Sector Sales Director, Alcatel Telecom Ltd
Jerry Jackson	Formerly Sales Director, Wallace Instruments
Paul Kahn	Managing Director, Thales Avionics
George Kessler CBE <i>Chairman of LPIC</i>	Joint Managing Director, Kesslers International
Martin Partridge	Managing Director, Brownell Ltd
Paul Priestman	Director, Priestman Goode
Mamun Rashid	Business Development Manager, Organic India Ltd
Professor Steven Schwartz	Vice Chancellor, Brunel University
Martin Stevens	Managing Director, Unimatic Engineers
Brian Treherne	South London Export Club
Dr Paul Unwin	Director, Stanmore Implants Worldwide Ltd

2) List of Consultation Respondents

i) Written responses to the consultation document were received from:

British Printing Industries Federation

Brunel University, Department of Design and Systems Engineering

Business Link for London

CH.com, Biggin Hill

City Fringe Partnership

EEF South

Forum London (London jewellery industry and allied trades element)

Greater London Authority, Economic and Business Policy, Mayor's Office

Jerrard Bros. PLC, Croydon

Jobcentre Plus

Learning and Skills Council East

London College of Communication (formerly London College of Printing)

London Development Agency Creative Sectors Team

London First Centre

London Manufacturing Advisory Service

Made in London

New Technology Institute, Dagenham (part of the Centre for Engineering and Manufacturing Excellence)

Southern and Eastern Region TUC

South London Partnership

Vision in Print

Voith Turbo Ltd., Croydon

Wandsworth Council

Annex One continued

2) List of Consultation Respondents

ii) Questionnaires on the consultation document were completed by:

COMPANIES	LONDON BOROUGH
Abbey Quilting Ltd	Barking/Dagenham
Antalis Envelopes Ltd	Barking/Dagenham
Blueline Office Furniture	Barking/Dagenham
Caroline Parkes Bridal Design	Merton
Centronic Ltd	Croydon
Chrisanne Ltd	Merton
Colour Five Ltd	Brent
Columbia Metals Ltd	Southwark
Combined Packaging Solutions	Merton
Deans Blinds and Awnings	Wandsworth
Diamond Build PLC	Haringey
Direct Image Systems and Communications Ltd	Hackney
Firemaster Extinguisher Ltd	Lewisham
Fisher Research Ltd	Enfield
Hunter Plastics	Greenwich
Jerrard Bros PLC	Croydon
Lynplan	Croydon
MBA Costumes Ltd	Camden

COMPANIES	LONDON BOROUGH
Mirafield Graphics	Greenwich
Nelsonbach	Merton
Penatube Ltd	Havering
Performance Chemicals	Bexley
P. C. Werth Ltd	Wandsworth
Primal Soup Ltd	Ealing
Purchase Engineering Ltd	Harrow
R. Holt and Co. Ltd	Camden
Roger Lascelles Clocks Ltd	Wandsworth
Saft Power Systems	Redbridge
Shelley Engineering	Merton
Sight	Croydon
SLE Ltd	Croydon
Smiths Aerospace	Croydon
Stewart Company	Croydon
Stoneham PLC	Bexley
Thales Acoustics	Harrow
Tradewinds	Southwark
Turney Turbines Ltd	Harrow

COMPANIES	LONDON BOROUGH
Turnwright Ltd	Barking/Dagenham
Voith Turbo	Croydon
Wallace Instruments	Croydon/Kingston
West Alloy	Merton
Zotefoams	Sutton

PARTNER ORGANISATIONS	LONDON BOROUGH/SUB-REGION
Business Link Business Advisor (David Briggs)	West
Cliff Hardcastle (CH.com)	Bromley
Cockpit Arts	Camden
Fuchs Lubritech	Enfield
Hatton Garden Jewellery Centre Partnership	Camden
ISTC (trades union)	
Mill Lane Envelopes Ltd	Croydon
Park Royal Partnership	West
Partnership for Profit	Outside London
Southern and Eastern Region TUC	
University of East London	Newham
Wandsworth Council, Economic Development Office	Central
West London Business	West

Annex Two

SOURCE DOCUMENTS

Augmenting Productivity in SMEs : report to the Small Business Service, Centre for Small and Medium Sized Enterprises, Warwick Business School, 2002

Britain's Relative Productivity Performance : Updates to 1999, National Institute of Economic and Social Research, 2002

Building the Future : an international trade strategy for London 2002 – 2006, Trade Partners UK, 2002

Clothing Sector in London : Innovative Cluster Fund Progress Report, SQW, 2003

Eila Campbell Lecture : Birkbeck College, Judith Mayhew, Chairman of Policy and Resources, The Corporation of London, 11th March 2002

Facts on London : Team London, 2003

Food Sector in London : Innovative Cluster Fund Progress Report, SQW, 2003

Investing in London : The case for the Capital, Greater London Authority, 2001

Key Issues Facing SMEs in London : Consultation Programme Results, EEF South (prepared for London Production Industries Commission), 2003

London Business Briefing, London First Centre, 2003

London's Economic Development Strategy : Success through Diversity, London Development Agency, 2001

London's Economic Development Strategy : Sustaining Success, London Development Agency, 2004

London Production Industries Commission
Theme Papers:

- Theme Paper No. 1 : Is there an entrepreneurial deficit in London's production industries?, D.J. Storey, University of Warwick, 2003
- Theme Paper No. 2 : London: a design and manufacturing paradox, David Redhead, Design Journalist, 2003
- Theme Paper No. 3 : Does London's manufacturing capture the value it creates?, Finbarr Livesey, Institute for Manufacturing, University of Cambridge, 2003
- Theme Paper No. 4 : Manufacturing services to rival business services, Finbarr Livesey, Institute for Manufacturing, University of Cambridge, 2003
- Theme Paper No. 5 : Manufacturing in London: where should development effort be focused?, Professor Peter Hines, Lean Enterprise Research Centre, Cardiff Business School, 2004

London Production Industries Commission working papers, 2004

- conclusions from consultation programme
- notes of Working Group meetings

London's Framework for Regional Employment and Skills Action, London Skills Commission, 2002

Making the Most of Production, Institute for Manufacturing, University of Cambridge, 2003

Manufacturing at the Crossroads, Engineering Employers' Federation, 2001

Manufacturing in the UK, Institute for Public Policy Research, 2003

Planning for London's Growth, Mayor of London, 2002

Print 21 : Coming of Age, British Printing Industries Federation, 2002

Region in Figures, Office for National Statistics, 2001

Sector Workforce Development Plan, SEMTA, 2001

Statistical profile of London's production industries, GLA Economics, 2003 (plus updates in 2005)

Strategy for Manufacturing, Made in London, 2003

The Case for Manufacturing in London : a blueprint for action, Made in London/Trades Union Congress, 2003

The London Plan : A Summary, Mayor of London, 2004

The Government's Manufacturing Strategy, HMSO, 2002

UK Competitiveness : moving to the next stage, DTI Economics Paper no. 3, 2003

We Can Make it Better : Manufacturing 2020 Foresight Panel, 2001

Annex Three

FURTHER INFORMATION

Further information on action plan and partnership activities can be found on a number of websites:

Business Link for London	www.bl4l.com
Design Immersion Programme	www.designcouncil.co.uk
London Apparel Resource Centre	www.londonapparel.com
London Assets for Business	www.la4b.com
London Business Support Network	www.knowledgecentres.com
Made in London	www.madeinlondon.org
Manufacturing Advisory Service	www.mas-london.co.uk
Manufacturing Competencies Retention Programme	www.soloman.co.uk
Sector Development Programme	www.engineeringtalk.com
UK Trade and Investment (international trade support services)	www.ukti.gov.uk
Year in Industry	www.raeng.org.uk

Details of other action plan activities can be obtained from:

Jody Chatterjee
 Head of Production Industries and Environment
 London Development Agency
 Devon House
 58-60 St. Katharines Way
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 E1W 1JX
 T: 020 7954 4660
 E: jodychatterjee@lda.gov.uk

The LDA is the Mayor's agency for business and jobs.

A summarised version of this document is also available in large print, braille, on disk, audio cassette and in the languages listed.

For a copy, please contact the LDA Communications Team:

London Development Agency
Devon House
58-60 St Katharine's Way
London
E1W 1JX

T: 020 7954 4500

E: communications@lda.gov.uk

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، الرجاء الاتصال برقم الهاتف او الكتابة الى العنوان أدناه:

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Chinese

中文
如果需要此文档的您的母语拷贝，
請致電以下號碼或和下列地址聯係

Greek

Αν θα θέλατε ένα αντίγραφο του παρόντος εγγράφου στη γλώσσα σας, παρακαλώ να τηλεφωνήσετε στον αριθμό ή να επικοινωνήσετε στην παρακάτω διεύθυνση.

Gujerati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

Hindi

यदि आप इस दस्तावेज़ की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नम्बर पर फोन करें अथवा दिये गये पता पर सम्पर्क करें।

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਸੰਪਰਕ ਕਰੋ:

Turkish

Bu broşürü Türkçe olarak edinmek için lütfen aşağıdaki numaraya telefon edin ya da adrese başvurun.

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہ کرم نیچے دیئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ قائم کریں۔

Vietnamese

Tiếng Việt
Nếu bạn muốn bản sao của tài liệu này bằng ngôn ngữ của bạn, hãy gọi điện theo số hoặc liên lạc với địa chỉ dưới đây.

MAYOR OF LONDON

LONDON
DEVELOPMENT
AGENCY