

Marketing and Inward  
Investment

Scrutiny  
Enquiry 7

## Acknowledgements

The Yorkshire and Humber Assembly would like to thank all the organisations and individuals who contributed to this scrutiny review, particularly the members of the Assembly and Yorkshire Forward panels and those who were interviewed and gave evidence at the stakeholder hearing.

# Foreword

As Chair of the Panel, I have found taking part in this scrutiny enquiry into marketing and inward investment activity in Yorkshire and Humber most interesting. These are high-profile areas of activity which impact greatly on the future development of the region. They relate to how we are perceived by organisations both within and outside the region, and to the offer we can make to foreign organisations looking to invest.

Marketing and inward investment are undertaken by Yorkshire Forward and by a range of organisations at the regional, sub-regional and local levels. The research commissioned by the panel revealed much strength in the current procedures. We focused our recommendations on identifying areas where we believe change will generate further improvements that will ensure that the time and resources invested in the scrutiny process build upon the good work already taking place.

On behalf of the Assembly, I would like to thank the members of both the YHA and Yorkshire Forward panels for the time and hard work they have put into this enquiry, as well as the stakeholders who gave evidence.

Cllr Heather Garnett

*North Yorkshire County Council  
Chair of the Scrutiny Panel*

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# 1. Introduction

- 1.1 This is the final report of the Yorkshire and Humber Assembly (YHA) Scrutiny Panel which has considered the extent to which regional marketing and inward investment activities have contributed to achieving the aspirations set out in the Regional Economic Strategy (RES).
- 1.2 The aim of YHA's scrutiny process is to examine the effectiveness of policy by collecting and reviewing relevant evidence and drawing conclusions from that evidence. Constructive recommendations are made to Yorkshire Forward and other partners in the region. These are designed to add value by improving the development, implementation and evaluation of future economic development strategy and policy. The findings of the enquiry will be used to inform the 2005 review of the Regional Economic Strategy and the development of the Northern Way Growth Strategy workstream to "Market the North to the World"
- 1.3 The panel has adopted a positive, forward-looking approach to the enquiry, based on a balanced approach to the evidence. Given the nature of the enquiry, evidence from stakeholders is based on their perceptions of the situation. It would be methodologically incorrect to assign percentages or scores to the views expressed. This qualitative evidence is important because perceptions, whether correct or not, strongly influence behaviour.

## Scope of this Enquiry

- 1.4 This scrutiny review has considered the effectiveness of regional inward investment and marketing initiatives and their contribution to the RES.
- 1.5 The inward investment element of the enquiry has focused upon:
  - activity to attract Foreign Direct Investment (FDI) to the region
  - activity to encourage existing investors to remain and make further investment in the region.Regional marketing has focused upon activity to develop the profile of Yorkshire and the Humber (excluding marketing aimed specifically at tourism).
- 1.6 The terms of reference of the enquiry outlined particular areas for investigation. These include a remit to:
  - evaluate the effectiveness of Yorkshire Forward activity on marketing, investment and aftercare from establishment of the Regional Development Agency (RDA) in 1999 to the present
  - assess how effectively Yorkshire Forward's regional investment and marketing activity relates and links with closely related areas such as cluster strategies and property development
  - assess how well Yorkshire Forward's marketing and investment activity is 'joined up' with regional, sub-regional and local activity

- assess the effectiveness of inter-regional inward investment activity
- examine whether the totality of regional inward investment and marketing initiatives will enable the objectives set out in the RES to be achieved
- examine how regional inward investment and marketing activity has taken account of sustainable development.

A copy of the brief for this enquiry can be found in the Appendix.

- 1.7 The report begins by outlining the background and context for the enquiry. It covers strategy and policy, the rationale and performance of regional inward investment activity, branding and marketing and finally operational structures.
- 1.8 Section 4 highlights strategy and policy, branding and marketing and inward investment activity as the three specific lines of enquiry the panel examined. There are also four cross-cutting themes: the regional, sub-regional and local interface and partnership working; communications; sustainable development; and monitoring and evaluation.
- 1.9 The next three sections (5, 6 and 7) use a range of evidence to draw conclusions on performance to date in each of the three areas and put forward recommendations for future improvements.
- 1.10 Section 8 draws some general conclusions on marketing and inward investment.
- 1.11 The action plan drawn up by Yorkshire Forward in response to the findings and recommendations in this scrutiny report can be found in section 9.

## 2. Summary of Recommendations

2.1 This scrutiny review examines the effectiveness of marketing and inward investment activity and its contribution to the achievement of the aspirations in the Regional Economic Strategy. The recommendations of the Panel recognise that good progress is being made and focus on key areas for improvement.

### Strategy and Policy

#### ***Recommendation 1:***

Yorkshire Forward's strategic approach appears in line with both marketing good practice and the increasingly competitive market for FDI which means there is likely to be less inward investment coming into the region. However it does also assume that regional intervention will help lead to sustained growth in the indigenous business base, which will enable the region to achieve its objectives. The propositional approach has only recently begun and there is a relatively long lead time from initial enquiry to investment. It is therefore too early to draw definitive conclusions on the effectiveness of the approach. Yorkshire Forward will be evaluating inward investment activity as part of the 2005 RES Review and undertakes regular evaluation of its marketing activity. The panel therefore recommends that a steering group of Yorkshire Forward and its partners undertake a fundamental re-evaluation of all inward investment and marketing activity, including the balance of resources allocated to attracting and retaining inward investment compared to indigenous businesses its effectiveness, contribution to meeting regional strategic objectives and value for money. This should take place in 2-3 years time, to feed into the review of the Regional Economic Strategy, due to be published in 2008.

#### ***Recommendation 2:***

Yorkshire Forward's inward investment strategy, its links to sustainable development and how it is inter-connected with other inward investment activity in the region should be summarised (on two sides of A4) and disseminated to all stakeholders in the region with potential involvement in FDI. This would form a basis for improving understanding and developing dialogue and greater engagement at all levels between Yorkshire Forward and stakeholders.

#### ***Recommendation 3:***

Key stakeholders in the region are encouraged to share all relevant local, sub-regional and regional strategies and plans, so that they can be used collectively to plan inward investment and marketing activity. This process would also help to identify common and competing approaches and areas of differentiation.

**Recommendation 4:**

Local and sub-regional partners and Yorkshire Forward should actively participate in meetings, both of investment practitioners and of more senior economic development managers/directors. This will help to ensure strategy and policy are aligned and develop working relationships and improve communications at all levels. YHA should help to facilitate these links as appropriate.

**Branding and Marketing****Recommendation 5:**

The Regional Marketing Forum, or another appropriate group, be tasked with a number of actions to market Yorkshire Alive with Opportunity within the region. These are:

- Agreeing the objectives of marketing activity and of the different brands and how they are best used throughout the region - this should be disseminated to key players across the region; this should help to ensure that all stakeholders have a clear understanding of the core values and role of "Yorkshire Alive with Opportunity" and that it is increasingly seen as the region's brand, rather than Yorkshire Forward's
- Raising awareness and understanding of regional brand values; one important development would be to draw up a short note explaining the region's Unique Selling Point/Proposition (USP) and linking this to the Alive with Opportunity brand and its values, and communicating this widely to partners
- Investigate whether it would be appropriate to allow more flexibility in the use of the Alive with Opportunity brand and whether this would increase usage
- Mapping local and sub-regional brands and endeavouring to ensure complementarity and consistency with the regional brand; this will help partners to see how all the brands can fit together and highlight their different roles and target audiences.
- Seeking to improve coordination and collaboration in all inward investment marketing and promotional campaigns; to achieve this partners would need a much greater understanding of Yorkshire Forward's propositional marketing approach.
- Establish an agreed Marketing Plan which draws on the mapping of local and sub-regional brands across the region, and which will support the development of the regional Yorkshire Alive with Opportunity brand

**Recommendation 6:**

In order to encourage and raise awareness and understanding of regional branding and marketing amongst stakeholders in the region, Yorkshire Forward develops a formal programme of briefings and dissemination, using both existing and new mechanisms.

## Inward Investment Activity

### **Recommendation 7:**

Clarification of internal and inter-organisational working arrangements and protocols (regional, sub-regional and local) should be undertaken through meetings with local and sub-regional partners; briefings on these arrangements should be disseminated to relevant stakeholders in the region.

### **Recommendation 8:**

To embed the focus on customers, all partners should work towards the achievement of an appropriate service standard, such as Servicemark, throughout the network by 2006. This will secure consistency of approach and high standards of customer service throughout the region.

### **Recommendation 9:**

Yorkshire Forward and partners should identify measures to support the development of the "virtual team" across the region- this should include induction programmes for key staff which involve visits to key stakeholders and sharing of best practice.

### **Recommendation 10:**

Partners across the region should agree a set of performance indicators and standards, building on the Tier 3 targets and compiled on the same basis, so that there are accurate and consistent statistics on regional performance on marketing and inward investment activity. YHA and Yorkshire Forward should lobby for consistent performance indicators at national level, if appropriate.

### **Recommendation 11:**

Yorkshire Futures should explicitly monitor and evaluate the sustainability impacts (economic, social and environmental) of inward investment activity and report on this in Progress in the Region. All partners should include sustainability considerations as part of the assessment of whether an individual project should be supported to go ahead.

## 3. Background and Context

### Strategy and Policy

3.1 Objective 3 of the RES seeks “To attract and retain more public and private investment in the region by providing the right product for investors and more effective marketing of the region.”

This objective embraces two key activity areas:

- more effective marketing of the region; and
- increasing, retaining and embedding foreign direct investment (FDI) in the region.

3.2 FDI takes place when the headquarters of the investing company is based overseas. This is distinct from inward investment originating in the UK.

3.3 Sustainable development is an overall “umbrella” concept fundamental to the Regional Economic Strategy’s direction as well as that of the other key regional strategies such as the Regional Spatial Strategy and Regional Housing Strategy. The region believes that the only way to achieve lasting growth is to create integrated, sustainable development and this also conforms with Government policy. This means building a better quality of life by maintaining high and stable levels of economic growth and employment, social progress that recognises the needs of everyone, effective protection of the environment and prudent use of natural resources.

3.4 Yorkshire Forward has adopted its cluster strategy as the focus of its proactive inward investment promotion. Marketing and promotional activity is focused on the attraction of businesses within the Advanced Engineering and Metals, Chemicals, Biosciences, Food and Drink and Digital Clusters. This report does not consider the cluster strategy itself, as this has been the subject of a previous scrutiny enquiry.

#### Inward Investment

3.5 For many years, particular regions in the UK have given high priority to foreign direct inward investment as a means of overcoming high unemployment arising from the decline of traditional industries and as a means of increasing Gross Domestic Product (GDP). Inward investment strategy is based on the hypothesis that indigenous business formation and development alone is unlikely to generate the desired GDP growth or economic restructuring (Note: a different measure, Gross Value Added (GVA), is now often used in place of GDP).

3.6 There are a number of potential benefits of inward investment, in addition to the direct benefits of jobs:

- new trading opportunities for indigenous business and multiplier effects on income, outputs and jobs

- new and transferable management and technical skills, technologies and working practices, and positive value chain effects
  - collaborative research and development opportunities and access to international networks.
- 3.7 Growing awareness of the economic value of inward investment has been accompanied by increasing worldwide competition to attract such investment. In tandem with this has been increased investor realisation of the choice of locations available and the market value of investment to agencies and locations seeking to attract mobile investment.
- 3.8 It has become increasingly clear in the past few years that aftercare arrangements and activities designed to embed and retain investment are a high priority. The market to attract FDI is increasingly competitive, as there are more locations looking to attract FDI and there is less investment to be won. Countries with lower costs than the UK are increasingly attracting new FDI. A significant proportion of FDI in the UK is now derived from the expansion and development of existing investors.

### National and Regional Performance for Inward Investment

- 3.9 Nationally, the UK has a relatively good record of attracting and retaining FDI. In 2002 the UK was the major EU destination for investment from the USA (36.5% of all USA investment in the EU) and from Japan (50.4% of all EU investment). The UK's market share of all EU investment in 2003 increased from 19% to 23%. In addition, based on data from UK Trade and Investment (UKTI, 2004), in 2002 the UK was second in terms of FDI stocks (ie the amount of FDI currently in the country) only to the USA. The UK had a stock of FDI of US \$639bn compared to US \$452bn in Germany and US \$401bn in France.
- 3.10 Looking at inward investment to the UK in 2003/04, the 811 successful projects created 25,463 jobs, which represents a 26% decrease in new jobs created compared with the previous year where 709 projects created 34,396 new jobs. The level of new investment has remained relatively static since a peak in 2000/01, whilst the number of expansions has continued to increase each year. Some economists have suggested that in the future we are likely to see more but smaller inward investment projects, with fewer jobs created due to greater market uncertainty. These are however more likely to be high value added functions (UKTI Annual Report). Projects looking for low-cost labour, which may have been attracted to the UK in the past, are now increasingly choosing countries in Eastern Europe, as well as India and China, where labour costs may be as little as 10% of those in the UK.
- 3.11 In Yorkshire and Humber, the region's share of national FDI peaked in 1997/98 and 1998/99 and, after a low point in 2000/01, has started to increase again (see Tables 1 and 2 below). Note that given the time lags between initial work and the confirmation of an investment, some of the projects announced in the first year of Yorkshire Forward activity are likely to have been initiated by the Yorkshire and Humber Development Agency (YHDA), the region's inward investment agency prior to 1 April 1999. Research suggests that nationally, inward investment is

skewed towards London and the South East and that a significant proportion of this is investment in knowledge-based businesses, like financial services and software.

**Table 1 FDI Projects 1995- 2003**

	1995/9	1996/9	1997/9	1998/9	1999/0	2000/0	2001/0	2002/0
	6	7	8	9	0	1	2	3
UK	496	497	628	664	800	875	844	715
Y&H	44	36	65	86	44	35	40	35
Y&H %	8.9	7.2	10.3	12.9	5.5	4.0	4.7	4.9

Source: UK Trade and Investment

**Table 2 Job effects of FDI in Yorkshire and Humber, 1995-2003**

	Total Jobs		New Jobs		Safeguarded Jobs		Average Jobs per Projects	
	Number	% UK	Number	% UK	Number	% UK	New	Safeguarded
1995/96	8,178	8	1,764	4	6,415	12	48	198
1996/97	5,390	5	1,887	4	3,503	7	35	150
1997/98	18,005	14	2,874	6	15,131	18	56	205
1998/99	22,998	18	3,626	8	18,672	25	37	181
1999/00	8,451	6	1,362	2	7,089	9	40	170
2000/01	5,463	4	1,417	3	4,046	6	58	140
2001/02	3,731	6.3	1,541	4	2,190	6	38	55
2002/03	3,275	6	2,729	8	546	2.7	78	16

Source: UK Trade and Investment

3.12 For 2002/03, only East Midlands (32), Northern Ireland (11) and the South West (33) received fewer projects than Yorkshire and the Humber (35). The North West (59), North East (62) and West Midlands (52) also fared better in terms of jobs (both new and safeguarded, apart from West Midlands where new jobs were fewer than for Yorkshire and the Humber). London and the South East received 279 projects (39%), but only 14% of total jobs.

3.13 The number and type of inward investment projects handled by Yorkshire Forward over the last three years give a mixed picture, with declining success and conversion rates, but the number of active projects generally increasing (see Table 3).

Table 3 Inward investment projects handled by Yorkshire Forward

Number of projects	2001/02	2002/03	2003/04
Foreign Owned	11	13	14
UK	5	9	N/A
Foreign New Jobs	N/A	482	605
Foreign: Jobs Safeguarded	N/A	459	459
Total: New Jobs	1,232	566	N/A
Total: Jobs Safeguarded	1,812	484	N/A
Jobs per Project (FDI)	N/A	72	76
Number Receiving RSA FD	14	11	N/A
FDI	N/A	8	9
Inward investment enquiry conversion rates			
Active Projects	138	206	196
Successes	13	19	14
Success Rate	9.42%	9.22%	7.14%
Conversion Rate	1 in 10.6	1 in 10.8	1 in 14

Source: Yorkshire Forward

3.14 The 2003 review of RES positioned indigenous growth as the focus for activity, with FDI less important than previously. If the performance of Yorkshire and Humber in terms of the establishment and survival of new firms in the region is compared with other regions, this shows that business start-up rates are amongst the worst in the UK (see Table 4), though the three year survival rate is comparatively better. The change in emphasis in the RES will not be reflected in these figures for several years. However strategically and in terms of meeting the region's aspirations, it is important that the decision to place greater reliance on the growth of the indigenous business base leads to improvements in start-up rates compared to other regions in the next 2-3 years.

Table 4 VAT Registrations by region per 10,000 adult population, 1998-2002

Area	1998	1999	2000	2001	2002
UK	36	38	39	37	37
England	38	40	41	39	39
North East	21	21	21	20	21
North West	32	34	34	32	33
Yorkshire and Humber	29	29	30	29	31
East Midlands	32	34	36	34	36
West Midlands	33	34	34	33	34
East of England	38	41	43	40	41
London	62	66	65	59	57
South East	43	44	45	44	44
South West	37	39	39	36	37

Source: *Progress in the Region, 2004* (statistics from Small Business Service)

## Branding and Marketing

- 3.15 The rationale for regional branding links clearly to the need to attract and retain investment and provide the right product for investors. The brand and associated promotional activity seeks to raise awareness of key regional strengths, "encouraging decision makers to keep the region 'front of mind' when it comes to investment, relocation or expansion."
- 3.16 Yorkshire Alive with Opportunity! (the regional brand) is independent of sub-regional and local branding and marketing. The regional brand is not place or project specific but about regional values, attributes and key strengths.
- 3.17 Campaigns are focused upon the image of the region as a potential location for business investment rather than promotion of specific investment opportunities in specific geographic locations.
- 3.18 In addition to seeking to improve perceptions of the region through a focused branding campaign, a propositional marketing approach has been adopted by Yorkshire Forward in the past two years which involves targeting specific investors in Yorkshire Forward's clusters whose requirements are effectively matched by the region's attributes such as skills, research and development (R&D) capabilities and supply chains. This targeted approach has been developed in response to growing competition for inward investment. Previous approaches focused on general promotion of the region to all potential investors.

- 3.19 This propositional approach seeks to complement the general promotional activity of UKTI and Yorkshire Forward's investment in establishing a regional brand. Propositional marketing is expected to generate a lower volume of higher quality enquiries and leads, compared to the general, "scattergun" inward investment marketing which has tended to take place in the past. These quality leads can then be nurtured by Yorkshire Forward's inward investment and cluster development teams. The emphasis is upon quality rather than quantity. Developing a proactive approach to marketing targeted on segments (in this case the Yorkshire Forward clusters) where the region can meet customer needs, is considered good practice in marketing terms.
- 3.20 Enquiries arising other than through propositional marketing are directed to sub-regional organisations and local authorities with responses to investors coordinated by the core inward investment team at Yorkshire Forward.
- 3.21 Sub-regional partnerships, local authorities and development agencies tend to focus, although not exclusively, on UK relocations.
- 3.22 Marketing and promotion may be viewed as a hierarchy from the general promotion of the UK (through UKTI), branding of the region through Yorkshire Alive with Opportunity!, sub-regional promotional campaigns, site and initiative specific marketing, and specific propositional marketing activities.
- 3.23 In terms of regional branding, the Yorkshire Alive with Opportunity! brand was developed after extensive research and consultation during 2000. The brand development encompassed qualitative and quantitative research and consultation amongst key stakeholders within the region and externally (including foreign direct investors and intermediaries) in order to establish brand values and attributes.
- 3.24 Awareness and use of the brand by regional stakeholders is evaluated each year as part of the Annual Yorkshire Forward Stakeholder review. Results to date are shown in Tables 5 and 6.
- 3.25 Awareness of the regional brand (Table 5) and perceptions of the region (Table 7) are generally either stable or improving amongst stakeholders. However usage of the brand dropped markedly between 2003 and 2004.

### **Inward Investment Activity**

- 3.26 A wide number and range of public sector organisations have an involvement in inward investment activity (see Diagram 1), as well as private sector businesses, agents, banks and consultants.
- 3.27 UK Trade and Investment (UKTI) is the lead UK Government national organisation involved in inward investment and promotes the UK and its regions, working closely with Government Departments, British Embassies, High Commissions and Consulates around the world.

Table 5 Awareness of “Yorkshire Alive with Opportunity!” brand (%)

	2001	2002	2003	2004
All Surveyed (1,000)	24	28	27	29
All Key Stakeholders	45	60	63	70
MPs	88	79	69	100
Local Authorities	47	81	83	74
Education	39	63	72	57
Voluntary/Community Organisations	31	56	52	30
Media	53	50	47	48
Businesses	20	20	20	26

Source: Yorkshire Forward

Table 6 Use of “Yorkshire Alive with Opportunity!” brand (%)

	2001	2002	2003	2004
All Surveyed (1,000)	10	12	24	13
All Key Stakeholders	15	19	40	28
MPs	25	50	15	0
Local Authorities	41	30	51	38
Education	10	5	33	3
Voluntary/Community Organisations	63	10	41	0
Media	6	19	14	8
Businesses	8	7	12	11

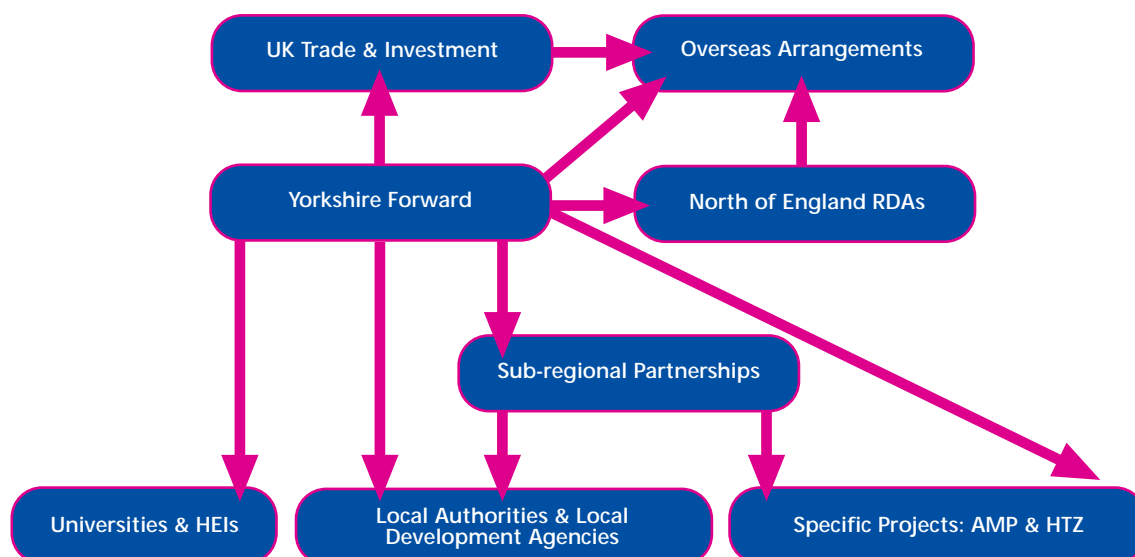
Source: Yorkshire Forward

Table 7 Perceptions of a region as a place to live, work and invest compared to 4 years ago (%)

	Do Not Know	Less Positive	Same	More Positive
All Surveyed 2004	8	3	18	70
All Key Stakeholders 2004	6	1	11	83
Businesses 2004	8	4	19	69
(2003 Comparisons)	(5)	(5)	(27)	

Source: Yorkshire Forward

Diagram 1 Public sector organisational arrangements for inward investment in Yorkshire and Humber



3.28 At the regional level, Yorkshire Forward leads on propositional marketing to international investors. It has both a strategic role and an operational role in relation to this type of FDI activity. Yorkshire Forward also leads on responding to enquiries which come into the region via UKTI. These enquiries are termed "reactive" in this report. Other investment enquiries are generated by a range of agencies locally and sub-regionally, and come into the region through a wide range of channels. Yorkshire Forward will not necessarily be aware of these enquiries.

3.29 Given the high cost of maintaining a focused international presence, in 2000 the three North of England Regional Development Agencies (Yorkshire Forward, One North East and Northwest Development Agency) created a joint venture, the North of England Inward Investment Agency, as a combined approach to marketing and lead generation in the North American market. Northwest Development Agency leads on this arrangement. A similar arrangement, working through an Australian Public Relations (PR) company, has recently been established in Sydney to target potential inward investment from Australia and New Zealand. Yorkshire Forward leads on this arrangement. These overseas offices support the propositional marketing approach and provide access to relevant market intelligence.

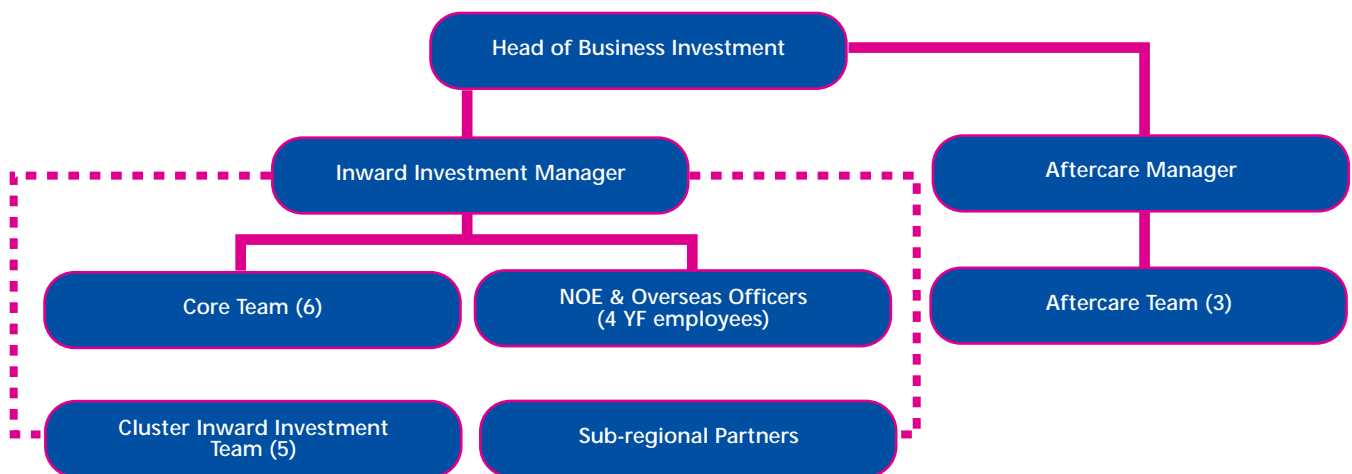
3.30 These initiatives seek to complement Yorkshire Forward offices in Japan (which is a collaboration between Yorkshire Forward and Northwest Development Agency) and Europe (France, Scandinavia and Italy), with a recently opened office in China (2004).

3.31 Yorkshire Forward's inward investment activities run alongside, and sometimes interconnect with, marketing and inward investment activities undertaken by sub-regional partnerships and local authorities/agencies, each seeking to compete and attract investment to their particular area.

3.32 These organisations undertake direct marketing activity to varying degrees and this marketing can be to any target business regardless of sector. They also interface with Yorkshire Forward. Local authorities generally lead on aftercare work. The precise operational arrangements in each sub-region and local area are locally determined and are supported by a mixture of resources, mainly local.

3.33 Yorkshire Forward has adopted a complex, matrix based internal structure. The posts active in inward investment and aftercare are shown in Diagram 2. Each member of the cluster inward investment team is located in one of the five cluster teams. The cluster teams and core inward investment team are all part of the Business Directorate. Cluster inward investment staff are therefore members of both the cluster and inward investment teams and of the Business Directorate but they all report to different Heads of Service within the Directorate. This structure is intended to increase integration across the organisation.

Diagram 2 Yorkshire Forward staff involved in inward investment and aftercare activity



3.34 In total, including overseas offices, Yorkshire Forward invests approximately £3m per year, 1% of its annual resources, on direct inward investment activities. It spends a further £600,000 in promoting the regional brand. Investment in cluster development, international trade and initiatives designed to enhance the regional product are in addition to these figures.

3.35 The RDA operates within a complex and competitive regional, national and international environment. The inward investment process and organisational arrangements are complex with a wide number of organisations involved at differing stages of the process.

3.36 In addition to the actions directly supported by Yorkshire Forward, inward investment activities in the region are also undertaken by a number of sub-regional and local agencies with their own staff and resources. Yorkshire Forward, Local Authorities and Sub-regional Partnerships are all involved in marketing, enquiry handling, assembly of investment packages and aftercare services.

## Overview

- 3.37 Inward investment trends reveal a reduction in global FDI at the same time as competition has increased to attract mobile investment. There is increasing recognition of the need for effective aftercare arrangements designed to support investor retention and expansion.
- 3.38 Companies considering substantial overseas investments will consider several countries or at least regions as possible candidates. They will usually apply a range of appraisal criteria when narrowing down options and making a final decision, some of which may include the availability of financial assistance. The competition for FDI is fierce with a premium placed on effective customer care and professionalism.
- 3.39 The regional focus upon inward investment embraces a complex and highly competitive process involving joint overseas arrangements with other North of England RDAs, and collaborative approaches with sub-regional and local development and business support agencies.
- 3.40 The competitive face of inward investment is not only reflected on the global stage but also internally within the region with sub-regions and local areas competing to attract FDI.
- 3.41 Investor development and aftercare are also important as a significant proportion of FDI is expected to be derived from the expansion and development of existing investors.

## 4. Themes and Lines of Enquiry

- 4.1 The aim of this scrutiny review is to examine the effectiveness of inward investment and marketing activity and its contribution to the achievement of the aspirations in the Regional Economic Strategy.
- 4.2 Three specific lines of enquiry have been examined in detail:
- Strategy and Policy
  - Branding and Marketing
  - Inward Investment Activity
- 4.3 Each of these lines of enquiry embraces cross cutting themes relating to:
- Regional, Sub-regional and Local Interface and partnership working
  - Communications
  - Sustainable Development
  - Monitoring and Evaluation
- 4.4 The sections which follow focus upon the main lines of enquiry and conclude with key recommendations for Yorkshire Forward and other partners across the region.

## 5. Strategy and Policy

- 5.1 The establishment of Yorkshire Forward and the Regional Economic Strategy (RES) review of 2003 signalled a shift away from attracting Foreign Direct Investment towards more emphasis on supporting indigenous businesses and those overseas companies already in the region.

*"There is not that kind of emphasis on inward investment now,...[since] Yorkshire Forward ... formed it [has] really ... [taken] a demotion in terms of policy."* **Stakeholder Hearing**

- 5.2 This takes place under the umbrella of sustainable development, to which Yorkshire Forward has stated its commitment.

- 5.3 Within this context, Yorkshire Forward's strategy for securing foreign direct investment (FDI) is primarily focused on a proactive approach of targeting businesses in its five regional clusters, where research has identified particular regional attributes that can meet the specific needs of potential investors.

- 5.4 This propositional marketing approach delivered through overseas inward investment activities is expected to generate a smaller number of high quality enquiries matched to the region's five clusters and aims to attract high quality businesses with good quality employment opportunities in growth sectors.

- 5.5 Local inward investment strategies, by contrast, emphasise job creation, site/property utilisation priorities and local cluster or sector priorities, rather than the regional clusters, although there may be overlap between these. Local initiatives tend towards UK investor relocation rather than foreign investors.

- 5.6 There are a number of mechanisms to facilitate communication between key public sector players in inward investment across the region. Yorkshire Forward provides information through web sites, publications and regular practitioner meetings. However the panel found that awareness of and commitment to Yorkshire Forward's propositional inward investment strategy is variable amongst key stakeholders in the region. Some are aware of the propositional approach:

*"... a few years ago ... there was a move to the proposition ... cluster based approach which is research-led and the identification of propositional marketing..."* **Stakeholder hearing**

Others are not aware of it:

*"We are not aware of any specific proactive marketing [on clusters]"* **Written evidence**

*"I am unaware of successes of marketing campaigns for investment [in the sub-region]... Who has Yorkshire Forward successfully attracted here?"* **Stakeholder hearing**

- 5.7 Yorkshire Forward acknowledges that there is always scope for improved communication and joint working, both at strategic and operational levels. Sharing of information and intelligence through regular Investment Development Officer practitioner meetings has recently been supplemented by a number of facilitated workshops designed to improve enquiry sourcing and handling. At the public hearing Yorkshire Forward requested support from YHA to help improve engagement on inward investment at a more senior level in local authorities.
- 5.8 The local product and local intelligence, for example on supply chains and planning issues, are factors potential investors take into account when making decisions about where to locate. Local authorities have many years experience in dealing with inward investment. The interface between Yorkshire Forward, the sub-regional inward investment agencies and local authorities is a key requirement to attracting inward investment.
- 5.9 Local authorities feel they have significant expertise in inward investment and aftercare based on detailed local knowledge of their area and on years of experience. Whilst recognising the need to work with Yorkshire Forward, some consultees questioned whether Yorkshire Forward made sufficient or effective use of local authority expertise and experience in their inward investment activities.

*“Whilst we [local authorities and Yorkshire Forward] are compatible, I don’t feel that we work as closely [as we could] bearing in mind we’ve got the same objectives.” Stakeholder Hearing*

*“There is no desire...to both include us or benefit from our successes and failures” Stakeholder Hearing*

- 5.10 Yorkshire Forward recognises the key role of local authorities in inward investment activity. However it has encountered some problems in accessing local strategies or plans relating to FDI and would welcome opportunities to be consulted about their revision and implementation.
- 5.11 For Yorkshire Forward, the development of quality propositions and a first class service to potential investors is a common objective which requires collaboration and the **two-way** sharing of information and intelligence between local and sub-regional stakeholders and Yorkshire Forward.
- 5.12 At the public hearing Yorkshire Forward recognised the need for effective partnership, as it is a strategic body and delivery within the region is at the local level, with local authorities, other local agencies and sub-regional partnerships. However the division is not quite as clearcut in reality, as Yorkshire Forward delivers both propositional marketing and aftercare to strategically important investors. Given this dual strategic and delivery role, it is important that those involved are clear on the remits of the various organisations involved and communicate effectively, to avoid, for example, multiple aftercare visits by different agencies to the same investor.

## Panel Conclusions and Recommendations: Strategy and Policy

- 5.13 The shift in emphasis in the Regional Economic Strategy between 2000 and 2003 from attracting new FDI towards greater support for investors with an existing presence in the region, along with developing the indigenous business base appears appropriate given recent global economic trends in FDI flows.
- 5.14 Stakeholders wanted a proactive approach by Yorkshire Forward and this is taking place through their propositional marketing work. It is too early to say whether this approach is feeding through into an increasing number of FDI projects in the region. However, awareness, understanding and 'buy-in' to Yorkshire Forward's propositional strategy for attracting FDI is variable amongst key stakeholders, highlighting scope for improvement in communications and engagement.
- 5.15 Local and sub-regional agencies also have a very important role to play in inward investment activity. The inward investment process involves a wide range of stakeholders in the region with a common objective of attracting FDI and different roles in the process, and so the need for a collective understanding of and commitment to strategy and policy is clear.
- 5.16 The panel believes that the different approaches taken to inward investment at the regional, sub-regional and local level in Yorkshire and Humber can be complementary rather than conflicting. However for this to be the case, partners from across the region need to understand the strategies and plans being followed by other players and recognise the differing roles and attractions of different localities. It is also important to recognise that there will always be an element of competition in attracting inward investment, even within the region. Equally it is important to be aware of the much broader, highly competitive, global stage for inward investment activity.
- 5.17 The Panel recognises that significant efforts have been made towards developing partnerships in the region. It considers that further development of relationships at all levels should be underpinned by openness and transparency from all parties, based on equality, and aim to enhance confidence and trust in a partnership built on mutual respect. This will help to secure greater region-wide understanding and commitment and further joint working.

- 5.18 The Panel recommends that:

### ***Recommendation 1:***

Yorkshire Forward's strategic approach appears in line with marketing good practice and the increasingly competitive market for FDI which means there is likely to be less inward investment coming into the region. However it does also assume that regional intervention will help lead to sustained growth in the indigenous business base, which will enable the region to achieve its objectives. The propositional approach has only recently begun and there is a relatively long lead time from initial enquiry to investment. It is therefore too early to draw definitive conclusions on

the effectiveness of the approach. Yorkshire Forward will be evaluating inward investment activity as part of the 2005 RES Review and undertakes regular evaluation of its marketing activity. The panel therefore recommends that a steering group of Yorkshire Forward and its partners undertake a fundamental re-evaluation of all inward investment and marketing activity, including the balance of resources allocated to attracting and retaining inward investment compared to indigenous businesses its effectiveness, contribution to meeting regional strategic objectives and value for money. This should take place in 2-3 years time, to feed into the review of the Regional Economic Strategy, due to be published in 2008.

#### ***Recommendation 2:***

Yorkshire Forward's inward investment strategy, its links to sustainable development and how it is inter-connected with other inward investment activity in the region should be summarised (on two sides of A4) and disseminated to all stakeholders in the region with potential involvement in FDI. This would form a basis for improving understanding and developing dialogue and greater engagement at all levels between Yorkshire Forward and stakeholders.

#### ***Recommendation 3:***

Key stakeholders in the region are encouraged to share all relevant local, sub-regional and regional strategies and plans, so that they can be used collectively to plan inward investment and marketing activity. This process would also help to identify common and competing approaches and areas of differentiation.

#### ***Recommendation 4:***

Local and sub-regional partners and Yorkshire Forward should actively participate in meetings, both of investment practitioners and of more senior economic development managers/directors. This will help to ensure strategy and policy are aligned and develop working relationships and improve communications at all levels. YHA should help to facilitate these links as appropriate.

## 6. Branding and Marketing

- 6.1 Evidence to the panel showed that the value of the regional brand, Yorkshire Alive with Opportunity!, is recognised.

*"The Yorkshire Alive with Opportunity marketing campaigns have been effective tools in raising awareness about the region. However campaigns could be made more effective by developing a targeted marketing plan. This will ensure that the awareness created does not become redundant but forms part of a continuous process."* **Written evidence: Local Authority**

- 6.2 However use of the brand by partners across the region reduced between 2003 and 2004 and is not extensive, ranging from 11% of businesses to 38% of local authorities (see Table 6)

- 6.3 Yorkshire Forward believes that awareness of the Yorkshire Alive with Opportunity brand has steadily grown and achieved a 'critical mass'. A recent Yorkshire Forward survey shows that 70% of "all key stakeholders" are aware of the brand, although the figure was only 29% for all 1,000 stakeholders questioned for the survey (see Tables 5 and 6). Yorkshire Forward is also committed to monitoring and evaluating the brand's impact.

- 6.4 Stakeholders appear to regard the regional brand as very general, although relatively few of such stakeholders have a regional remit. As a result there has been only limited 'buy-in' to the brand which is not felt to recognise particular local strengths and distinctive features which clearly exist between sub-regions and local areas in Yorkshire and Humber. Other more localised brands have emerged or been sustained to reflect sub-regional/local priorities and circumstances.

*"Is your priority very much the [local area] values or the Yorkshire values?... some investors find it quite complicated... that they would just [prefer] to deal with one area."* **Stakeholder hearing**

- 6.5 Yorkshire Alive with Opportunity is a regional brand that has been developed to project the region as a whole. Yorkshire Forward takes a long term view about the development of the brand and is keen to see it develop in partnership with others.

- 6.6 Awareness of Yorkshire Forward's regional inward investment marketing and promotional strategies is variable across the region and stakeholders appear to have little awareness of Yorkshire Forward's propositional marketing approaches.

*"I would preface this response by saying that we are aware of extremely little proactive marketing activity that is being undertaken by Yorkshire Forward under the YAWO brand or otherwise. This is not to say that such activity is not taking place, but that it has not been communicated to us."* **Written evidence: Local Authority**

*"We are just not engaged...I don't even know whether there is a Marketing Strategy."*  
**Stakeholder Hearing**

- 6.7 The focus on informing and influencing FDI intermediaries through 'relationship marketing' is considered by Yorkshire Forward to have been appropriate and effective, with evaluation reports highlighting improved perceptions of the region amongst key influencers and decision makers. However it is difficult to evidence a clear link between this awareness and actual inward investment leads generated.
- 6.8 Yorkshire Forward strongly believes in their targeted propositional marketing with its emphasis upon developing and promoting the region's key strengths in its five clusters and in particular the specialist capabilities of the region's higher education sector and links with industry and commerce.
- 6.9 A wide range of organisations are involved in inward investment marketing although coordination appears to be lacking in some instances, with different messages being given and a wide range of activities taking place. Improved coordination and collaboration should enhance resource utilisation and the effectiveness of marketing.

*"I would like to see us working with Yorkshire Forward or Yorkshire Forward working with us as partners, and being able to undertake marketing and promotions jointly where they give the scale of the region and we give the strengths of the locality."* **Stakeholder Hearing**

- 6.10 Successful work within Leeds has led to initial proposals to establish a Regional Marketing Forum to link marketing messages and activities in a more coherent and robust way, formalising working arrangements and benchmarking against best practice.
- 6.11 Stakeholders consider Yorkshire Forward's marketing activity to be of a high standard:

*"We find that the current marketing programme is professionally managed and well-defined in its target audience."*

*"Yorkshire Forward material is high quality and professionally produced."* **Written evidence: Local Authorities**

- 6.12 Others express concerns relating to the effectiveness of marketing campaigns:

*"Yorkshire Forward and its predecessor YHDA were quite good at handling inward investment enquiries but not that great at generating them in the first place."*

*"I just get the feel[ing] that...we are reacting to enquiries that come to us rather than going out there and grabbing them."* **Stakeholder Hearing**

## Panel Conclusions and Recommendations: Branding and Marketing

- 6.13 Good marketing practice suggests that effective branding and marketing needs to underpin the whole of Yorkshire Forward's strategy and activities.
- 6.14 Branding and proactive marketing of the region by Yorkshire Forward encompasses an appropriate blend of branding and highly focused target marketing within the core values of the regional brand.
- 6.15 Regional brand building activity is accompanied by specific cluster-based and other marketing activities which enhance overall inward investment marketing and promotion.
- 6.16 Whilst stakeholder surveys highlight strong awareness of the brand within the region, there are low levels of usage. Stakeholder feedback suggests this may be due to a lack of understanding of the brand's core values and their relevance to individual locations. Another reason may be because of mandatory pressure to use other logos, for example recipients of European structural funds are required to use the European Union logo.
- 6.17 There is a need to ensure compatibility of local and sub-regional brands with the regional brand and its values. This is to ensure that stakeholders feel able to use the Yorkshire brand, as appropriate, at different spatial scales and improve the coordination of marketing activities undertaken by Yorkshire Forward and key stakeholders in the region. The Panel welcomes the proposed establishment of a Regional Marketing Forum as an appropriate vehicle to improve coordination.
- 6.18 Awareness and understanding of the propositional marketing approach is patchy across the region. The panel believes that greater awareness of Yorkshire Forward's propositional marketing approach and of the regional product amongst stakeholders would help reduce parochialism and improve buy-in by partners across the region.
- 6.19 Yorkshire Forward is a "pinchpoint" as it has the central role in regional branding and marketing, and this is crucial to consistency and co-ordination. To ensure that any customer's experiences are in line with the regional brand and its values, Yorkshire Forward needs to market Yorkshire Alive With Opportunity! within the region, as well as externally. This is important because the main "salesforce" are people within the region. They need to buy-into and reinforce brand values through their actions, otherwise the brand itself is undermined. This should also help ensure that sub-regional and local branding is consistent with regional brand values.

6.20 The Panel recommends that:

***Recommendation 5:***

The Regional Marketing Forum, or another appropriate group, be tasked with a number of actions to market Yorkshire Alive with Opportunity within the region. These are:

- Agreeing the objectives of marketing activity and of the different brands and how they are best used throughout the region - this should be disseminated to key players across the region; this activity should help to ensure that all stakeholders have a clear understanding of the core values and role of “Yorkshire Alive with Opportunity” and that it is increasingly seen as the region’s brand, rather than Yorkshire Forward’s
- Raising awareness and understanding of regional brand values; one important development would be to draw up a short note explaining the region’s Unique Selling Point/ Proposition (USP) and linking this to the Alive with Opportunity brand and its values, and communicating this widely to partners
- Investigate whether it would be appropriate to allow more flexibility in the use of the Alive with Opportunity brand and whether this would increase usage
- Mapping local and sub-regional brands and endeavouring to ensure complementarity and consistency with the regional brand; this will help partners to see how all the brands can fit together and highlight their different roles and target audiences.
- Seeking to improve coordination and collaboration in all inward investment marketing and promotional campaigns; to achieve this partners would need a much greater understanding of Yorkshire Forward’s propositional marketing approach.
- Establish an agreed Marketing Plan, which draws on the mapping of local and sub-regional brands across the region, and which will support the development of the regional Yorkshire Alive with Opportunity brand

***Recommendation 6:***

In order to encourage and raise awareness and understanding of regional branding and marketing amongst stakeholders in the region, Yorkshire Forward develops a formal programme of briefings and dissemination, using both existing and new mechanisms.

## 7. Inward Investment Activity

- 7.1 The Government's published performance statistics (see paragraph 3.11) indicate that the results of inward investment activities in Yorkshire and the Humber are low relative to other regions.

*"Yorkshire and Humber does not appear to be a major recipient [of FDI], particularly in relation to its size and share of the country's population." **Written evidence: Local Authority***

*"The figures that have come out nationally show that we are not punching our weight in terms of securing inward investment." **Stakeholder hearing***

- 7.2 However some stakeholders consider performance may well be better than the published figures suggest.

*"Because they haven't talked to the Local Authorities and they haven't collected/done a trawl of our individual successes, again I think we tend to dramatically understate what has happened ..." **Stakeholder hearing***

*"I think that by collecting statistics based on funding returns and other activities, you are actually dramatically understating the success of the region." **Stakeholder Hearing***

- 7.3 Yorkshire Forward does not agree that the region's inward investment performance has been relatively poor and cited the European Investment Monitor Report published by Ernst and Young. The report highlights significant increases in investment, with the region placed 4th out of the 11 UK regions. This figure is based on the change in the number of projects between 2002 (15 projects) and 2003 (25), a 66% increase. This is against an overall increase of 22% in projects for the UK as a whole. However caution is required in interpreting these figures as they are only a one-year snapshot and they cannot be directly compared to national government statistics as they use different information and cover different time-frames. Yorkshire Forward has approached local partners in the past to establish FDI successes. However they have been reluctant to share information, because they believe that Yorkshire Forward is trying to claim credit for their successes.

- 7.4 Describing the present time as " a watershed period", Yorkshire Forward believes it is too early to make a reasonable assessment of their performance but suggested that findings from a benchmarking survey of investment promotion agencies provides "very strong evidence that we are performing well in some areas and shows areas for improvement ... in others, but this is the kind of thing that we do on a regular basis to improve our performance in inward investment, project management, conversion, project handling, etc."

- 7.5 This report, the IPA Performance Benchmarking Report 2004 (by GDP Global Development) looked at how enquiries are handled by a range of investment promotion agencies. However it

did not assess success in actually obtaining investment. The report states that, in relation to e-communications and investment project handling, *“the Agency’s performance was significantly better than the benchmark for developed world IPAs in most respects.”*

- 7.6 A further complicating factor is that different statistics are collected by different organisations. For example, UKTI uses jobs announced, whereas DTI changed to using jobs created two years ago. Funders of specific projects will also have their own definitions for indicators and targets. It can be difficult to obtain information on jobs created from firms, unless it is a requirement of their receiving grant support. As part of the monitoring for Selective Finance for Investment (SFI), the Department of Trade and Industry (DTI) have been keen to develop better measures of the impact of financial assistance, such as Gross Value Added. However the need for better information has to be balanced against making reasonable demands on firms.
- 7.7 In 2004/5, Yorkshire Forward conversion and job creation targets appear to be roughly in line with expectations to date. Up to November 2004, there had been 19 successes (against a target for the year of 35) and 1,070 jobs created (against a target for the year of 2,500). Yorkshire Forward emphasises that the quality of the jobs created, not just the number, is of key importance. The indirect (or ‘multiplier’) effects of direct FDI job creation also need to be considered, although measuring this is often problematic.
- 7.8 Yorkshire Forward indicated that they make efforts to avoid double counting or overstating claims of success regarding FDI conversions and jobs created as a consequence.
- 7.9 From the information available to the panel, direct Yorkshire Forward spend on FDI is some 1% of annual expenditure. This is in addition to spend on developing the regional product, international trade and the resources available at sub-regional and local levels.
- 7.10 Key stakeholders consider that around 60% of the jobs created by inward investors in Yorkshire and Humber are the result of reinvestment in existing operations, with the remaining 40% from investors starting up in the region.

*“Within current market conditions, there is not a lot of FDI around, and therefore aftercare has got to be an important area.”*

However it is also important to remember that:

*“You get second and third phase expansions by actually getting the inward investment in the first place.” Stakeholder Hearing*

- 7.11 Yorkshire Forward considers the resources they devote to FDI activity are appropriate and in line with most other RDAs. They also believe there has been leverage from promoting the region to intermediaries and marketing aimed at promoting clusters and business support more generally across the region. A variety of events and promotional campaigns have FDI marketing ‘spin-

offs'. As also noted by stakeholders, over the last year Yorkshire Forward have reviewed and enhanced their FDI aftercare support and have strengthened this work within their cluster teams.

- 7.12 Some stakeholders consider that a disproportionate number of enquiries disseminated by Yorkshire Forward are only for South Yorkshire to respond to, when the 'product offer' of other parts of the region may well be more appropriate.

*"It is not really...Yorkshire Forward's job to select because if we feel we can accommodate it acceptably with our area, we should be given the chance to secure that investment."*

**Stakeholder Hearing**

- 7.13 Yorkshire Forward states that it sends enquiries to areas meeting the specification of the customer. It does not seek to direct enquiries to South Yorkshire only, unless this is what the customer has asked for. South Yorkshire is generally of interest because there are additional financial incentives available compared to other parts of the region. The customer's preferences or specifications are paramount.

- 7.14 Yorkshire Forward believes there is a misconception that a disproportionate number of enquiries are focused on South Yorkshire. They highlight that Renaissance South Yorkshire use the shared Customer Relationship Management (CRM) system to log all their enquiries, which may give the impression that they receive most of the enquiries sent on by Yorkshire Forward.

- 7.15 Yorkshire Forward does not feel that some areas are targeted over others for inward investment, beyond meeting the specifications of customers. For Yorkshire Forward addressing parochialism remains a key challenge in this as well as other areas of activity. Effective partnership working is especially important in attracting and retaining FDI into the region. The economic impact of major projects, in particular, is not confined to local labour markets. Yorkshire Forward feels their interactions with each area need to be looked at across the full range of their activity, rather than focusing on just one aspect of it, such as inward investment.

- 7.16 Local authorities and sub-regional partnerships stressed the need to work with Yorkshire Forward. However they were generally unclear about the organisational arrangements for inward investment activity within Yorkshire Forward, particularly the division of responsibilities and the linkages between the inward investment, aftercare and cluster teams. They often did not know who at Yorkshire Forward to contact about a specific enquiry. This is a particular concern given the need for efficient and effective customer service across agencies in terms of account management and seamless service delivery.

*"A small Key Account Management Team has recently been established and we feel that this will improve the effectiveness of Yorkshire Forward's investor development work, but that to maximise this effectiveness, the team must work in cooperation with the Local Authorities in the region."*

*“Yorkshire Forward has an aftercare team but it has only recently been established and appears under-resourced. Their remit is also unclear to regional partners and therefore it is sometimes easier and not necessary to include them.”*

*“Generally there needs to be better liaison between local authorities and the cluster managers.”*

**Written evidence: Local Authorities**

However the GDP Global IPA Performance Benchmarking Report 2004 found that contact details were available via the Yorkshire Forward website for prospective investors.

- 7.17 There is, however, a recognition amongst key stakeholders of the professionalism of Yorkshire Forward in relation to inward investment:

*“Clear account management is often established at an early stage and the professionalism of the enquiry handling team is in our experience of a very high standard.”*

*“Response to inward investment enquiries is also positive and professional.”*

*“The mechanisms that facilitate this cooperation have been developed over a number of years and it is felt that the system now works well most of the time.”* **Written evidence: Local Authorities**

- 7.18 Yorkshire Forward is developing a ‘no wrong door’ approach to inward investment so that any enquiry is passed on and dealt with appropriately, no matter how it is received. The panel welcome this approach for customers. However stakeholders feel that, as agencies working with Yorkshire Forward, they should have clearer information on who to contact for a specific enquiry.
- 7.19 The investment planning process is being employed by Yorkshire Forward to foster cooperation and joint working amongst a range of partners. They feel regional - local interactions are improving in most areas and better engagement with Local Authorities is recognised as a key priority. While welcoming and acknowledging the valuable contribution made by many Local Authorities to inward investment and marketing, Yorkshire Forward believe that some need to significantly ‘raise their game’ in an increasingly competitive environment.
- 7.20 FDI is traditionally understood to be motivated by economic objectives, and so in the past environmental and social considerations have not received much attention.
- 7.21 Stakeholders in the region believe that the UK’s planning and environmental regulations address many environmental concerns and that a range of other initiatives (Single Regeneration Budget for example) support the social inclusion agenda. The prime objective is to attract investment and then to maximise local impacts, particularly employment, by working with agencies such as the Learning and Skills Council and Jobcentre Plus. One sub-regional partnership includes

meeting sustainable development strategy as part of the assessment criteria for projects looking for support and endorsement.

7.22 Yorkshire Forward is strongly committed to achieving the greenhouse gas emission targets set out in the RES, which it sees as part of moving to a leaner, more competitive and more efficient industrial base. It feels that the cluster focus lends itself to reducing greenhouse gas emissions because there is now an environmental technologies cluster and because the approach is about improving productivity and efficiency. Yorkshire Forward has the EMAS standard and, as part of this, all new projects requesting its funding through the Single Pot undergo a two-stage environmental assessment process. Project evaluations also take sustainability issues into account, for example a recent assessment of the North of England office.

7.23 At the Yorkshire Forward hearing one example was highlighted of a potential inward investor being declined over concerns about its negative environmental impact. Inevitably difficult issues can arise when appraising prospective investors where there are different economic and environmental impacts; Yorkshire Forward feels it does its best to weigh up the net gains for the region and take account of longer term priorities for sustainability. An example is Guardian Glass in Goole. There was only one suitable site in the whole of the UK, but it was greenfield. Yorkshire Forward chose to support the investment because of the quality of the investment and the jobs created. Yorkshire Forward provides information to investors on local suppliers, but they cannot make the firm use those suppliers.

7.24 Yorkshire Forward sees inward investment, as for other policy areas, as needing to take account of social inclusion, and particularly worklessness, through the "connecting people to economic opportunity" agenda. In this case this is done strategically because areas of greatest need get the greatest level of resources to help people access jobs. Yorkshire Forward supports initiatives to ensure that skills and training relevant to the clusters are in place. Finally they have also supported local Single Regeneration budget programmes, working with local authorities.

### **Panel Conclusions and Recommendations: Inward Investment Activity**

7.25 There are signs of improving regional performance in attracting inward investment projects and jobs. There are also prospects of future FDI generated by the propositional marketing approach and the development of the regional product. Yorkshire Forward already scores well in terms of the professionalism and quality of its dealings with potential investors. It is vital that a high quality professional service is provided across all agencies involved in inward investment and marketing activity in the region.

7.26 All stakeholders recognise the need for customer focus, quality standards and seamless service delivery. Inward investment in the region involves a complex multi-agency approach to meeting the needs of potential and existing investors, and so communication, cooperation and collaboration are prerequisites to success. The concept of 'no wrong door' is a key requirement and the panel believes that for inward investment this should form part of the Better Deal for

Business approach. The scrutiny process has highlighted scope for improvement in inter-agency working and that stakeholders need to understand the constraints and motivations of all their partners to develop a regional partnership approach.

7.27 There is a need for improved understanding of Yorkshire Forward’s organisational arrangements and how it deal with enquiries, and of how different partners are operating. This will help to overcome perceptions that Yorkshire Forward targets inward investment enquiries beyond customer specifications. Both of these issues require improved communication. Stakeholders need to know and understand what is happening across the whole region, not just in their sub-region or local area. If customers are to receive a high quality service, this must ignore administrative boundaries, as labour markets, for example, do. Improving understanding and engagement is the joint responsibility of all key stakeholders, given that success in attracting investment requires a common commitment to customer focus and quality. The panel believes that all inward investment practitioners in the region should see themselves as part of a “virtual team”, promoting the region, since the benefits of any investment will generally be felt beyond that locality’s administrative boundaries.

7.28 The region, the Regional Economic Strategy and Yorkshire Forward have all made clear commitments to sustainable development. FDI therefore needs to be understood as one of the tools for realising that commitment. The region’s efforts to attract FDI must focus on how any particular investment will deliver simultaneous economic, social and environmental benefits.

7.29 A range of statistics is collected by different agencies on inward investment performance. This creates confusion and duplication of activity.

7.30 The Panel recommends that:

**Recommendation 7:**

Clarification of internal and inter-organisational working arrangements and protocols (regional, sub-regional and local) be undertaken through meetings with local and sub-regional partners; briefings on these arrangements should be disseminated to relevant stakeholders in the region.

**Recommendation 8:**

To embed the focus on customers, all partners should work towards the achievement of an appropriate service standard, such as Servicemark, throughout the network by 2006. This will secure consistency of approach and high standards of customer service throughout the region.

**Recommendation 9:**

Yorkshire Forward and partners should identify measures to support the development of the “virtual team” across the region- this should include induction programmes for key staff which involve visits to key stakeholders and sharing of best practice.

***Recommendation 10:***

Partners across the region should agree a set of performance indicators and standards, building on the Tier 3 targets and compiled on the same basis, so that there are accurate and consistent statistics on regional performance on marketing and inward investment activity. YHA and Yorkshire Forward should lobby for consistent performance indicators at national level, if appropriate.

***Recommendation 11:***

Yorkshire Futures should explicitly monitor and evaluate the sustainability impacts (economic, social and environmental) of inward investment activity and report on this in Progress in the Region. All partners should include sustainability considerations as part of the assessment of whether an individual project should be supported to go ahead.

## 8. Conclusions

- 8.1 Inward investment and marketing in Yorkshire and Humber needs to be strategically positioned and understood as one of the mechanisms for delivering the region's vision, Advancing Together, and the objectives in the Regional Economic Strategy. Inward investment and marketing activity is a means to an end, not an end in itself.
- 8.2 Strategically, the greater focus in the RES on indigenous business and aftercare, as compared to FDI, appears sound. However it does assume that intervention will significantly strengthen the business base, and this has yet to be demonstrated.
- 8.3 Yorkshire Forward's propositional inward investment activity has only recently started in earnest and will be evaluated as part of the 2005 Regional Economic Strategy (RES) Review. However it is vital that there is a fundamental review of all inward investment and marketing activity, including its relative priority compared to supporting indigenous business, prior to the 2008 revision of the RES. This will give a period of several years for activity to establish itself and achieve results, but ensure that it does not continue indefinitely regardless of its contribution to achieving the objectives in the RES.
- 8.4 The attraction and retention of FDI in an increasingly competitive global market requires an excellent product, effective marketing and promotions, and first class customer service. Yorkshire Forward and regional partners are making progress on all three fronts and there are signs of improved regional performance.
- 8.5 The inward investment process and organisational arrangements are complex with a wide number of organisations involved at different stages. Yorkshire Forward, Sub-regional Partnerships, Local Authorities and other agencies are involved in marketing, enquiry handling, 'product' packaging, account management and aftercare services. This multi-agency approach requires effective communication, coordination and collaboration underpinned by clarity of roles, effective working relationships, sound communications and efficient/effective operational protocols.
- 8.6 This scrutiny enquiry has revealed a common commitment to attracting, retaining and developing FDI and a recognition of the need to work in partnership in order to meet the needs of investors.
- 8.7 Evidence suggests that, while much has been achieved, there is scope for improvement in communications between partners, to increase understanding and commitment and to develop a regional partnership-based approach.
- 8.8 This challenge is complicated by the differences of approach to inward investment within sub-regions and local areas, and of organisational arrangements reflecting the diversity of the region.

- 8.9 At a strategic level, the region is committed to working towards sustainable development. However further information about the contribution of inward investment and marketing to achieving the region's ambitions for sustainable development is required, as are appropriate mechanisms to ensure that sustainability underpins decision-making on inward investment.
- 8.10 The recommendations of the Panel recognise that good progress is being made and accordingly focus upon key areas for improvement designed to enhance collective approaches in all spheres of marketing and inward investment activity.

## Yorkshire Forward Action Plan

	Recommendations	Actions	Timescale
Strategy and Policy	<p><b>Recommendation 1</b> That a steering group of Yorkshire Forward and its partners undertake a fundamental re-evaluation of all inward investment and marketing activity, including the balance of resources allocated to attracting and retaining inward investment compared to indigenous businesses, its effectiveness, contribution to meeting regional strategic objectives and value for money. This should take place in 2-3 years time, to feed into the review of the Regional Economic Strategy, due to be published in 2008.</p>	<p>It should be noted that a switch towards indigenous businesses has occurred in line with the RES over the last 3 years and that activities of this kind are already evaluated as part of the PMF process.</p> <p>Further, a new target has been set by Government which Inward Investment activity is measured against and is reported to Government twice annually.</p> <p>However, existing groups (eg. Regional Marketing Group and Investment Development Officers (IDO) groups) would be appropriate to come together to examine these issues in time for the next RES Review.</p>	April 2007
	<p><b>Recommendation 2</b> Yorkshire Forward's inward investment strategy, its links to sustainable development and how it is inter-connected with other inward investment activity in the region should be summarised (on two sides of A4) and disseminated to all stakeholders in the region with potential involvement in FDI. This would form a basis for improving understanding and developing dialogue and greater engagement at all levels between Yorkshire Forward and stakeholders.</p>	<p>A document will be produced outlining the key points raised in the recommendation and disseminated to all partners through the IDO meetings.</p>	July 2005
	<p><b>Recommendation 3</b> Key stakeholders in the region are encouraged to share all relevant local, sub-regional and</p>	<p>Yorkshire Forward will facilitate this action through the existing IDO meeting and through the sub regional steering group</p>	Phased in over 12 months to June 2006.

	Recommendations	Actions	Timescale
<p><b>Branding and Marketing</b></p>	<p>regional strategies and plans, so that they can be used collectively to plan inward investment and marketing activity. This process would also help to identify common and competing approaches and areas of differentiation.</p>	<p>meetings. We have already commenced the process of encouraging partners to share their plans, but we still need to do some work on the cycles of our Partners plans. Collective planning will also be actioned through these structures. There is also a role for the YHA to play in encouraging stakeholders to participate.</p>	
	<p><b>Recommendation 4</b> Local and sub-regional partners and Yorkshire Forward should actively participate in meetings, both of investment practitioners and of more senior economic development managers/ directors. This will help to ensure strategy and policy are aligned and develop working relationships and improve communications at all levels. YHA should help to facilitate these links as appropriate.</p>	<p>This is already being progressed through the sub regional partner meetings.</p> <p>We would appreciate the assistance of the YHA to facilitate this further and suggest that they could do this through nominating a member of staff to attend the IDO meetings to discuss the Marketing and Investment Scrutiny Report and the recommendations.</p>	<p>Ongoing.</p> <p>Buy-in from partners to the Scrutiny Report and its recommendations to be achieved by October 2005.</p>
	<p><b>Recommendation 5</b> The Regional Marketing Forum, or another appropriate group, be tasked with a number of actions to market Yorkshire Alive with Opportunity within the region. These are:</p> <ul style="list-style-type: none"> <li>- Agreeing the objectives of marketing activity and of the different brands and how they are best used throughout the region - this should be disseminated to key players across the region; this should help to ensure that all stakeholders have a clear understanding of the core values and role of "Yorkshire Alive with Opportunity" and that it is increasingly seen as the region's brand, rather than Yorkshire Forward's.</li> <li>- Raising awareness and understanding of regional brand values; one important development would be to</li> </ul>	<ul style="list-style-type: none"> <li>- The Marketing Forum will be used to share best practice and clarify the role of the YAWO activity in relation to primarily the key city brands and activity.</li> <li>- The region's USPs will be developed into a briefing note and communicated through existing partnerships. Partners</li> </ul>	<p>December 2005</p> <p>December 2005</p>

Recommendations	Actions	Timescale
<p>draw up a short note explaining the region's Unique Selling Point/ Proposition (USP) and linking this to the Alive with Opportunity brand and its values, and communicating this widely to partners.</p> <ul style="list-style-type: none"> <li>- Investigate whether it would be appropriate to allow more flexibility in the use of the Alive with Opportunity brand and whether this would increase usage</li> <li>- Mapping local and sub-regional brands and endeavouring to ensure complementarity and consistency with the regional brand; this will help partners to see how all the brands can fit together and highlight their different roles and target audiences.</li> <li>- Seeking to improve coordination and collaboration in all inward investment marketing and promotional campaigns; to achieve this partners would need a much greater understanding of Yorkshire Forward's propositional marketing approach.</li> <li>- Establish an agreed Marketing Plan which draws on the mapping of local and sub-regional brands across the region, and which will support the development of the regional Yorkshire Alive with Opportunity brand.</li> </ul> <p><b>Recommendation 6</b> In order to encourage and raise awareness and understanding of regional branding and marketing amongst stakeholders in the region,</p>	<p>will be encouraged to utilise this document.</p> <ul style="list-style-type: none"> <li>- We will look at the opportunity to include a call to action that is flexible enough to use with partners across the region in conjunction with the existing YAWO brand marque</li> <li>- The key cities brands and their marketing plans will be mapped as part of the Marketing Forum.</li> <li>- See response to Recommendation 2. This is already being done through the IDO meetings. The Inward Investment team have also commissioned benchmarking research on our propositional marketing approach and is in the process of encouraging involvement and input from all Partners.</li> <li>- See point 4 above</li> </ul> <p>Yorkshire Forward will formulate a programme of briefings and work towards disseminating information through existing partnerships such as the IDO meetings, YHA, Inform, Regional Marketing Forum, etc.</p>	<p>December 2005</p> <p>December 2005</p> <p>Ongoing</p> <p>-</p> <p>Briefings to be developed by December 2005, dissemination will be continuous after this.</p>

	Recommendations	Actions	Timescale
<p><b>Inward Investment Activity</b></p>	<p>Yorkshire Forward develops a formal programme of briefings and dissemination, using both existing and new mechanisms.</p> <p><b>Recommendation 7</b> Clarification of internal and inter-organisational working arrangements and protocols (regional, sub-regional and local) should be undertaken through meetings with local and sub-regional partners; briefings on these arrangements should be disseminated to relevant stakeholders in the region.</p>	<p>Inquiry handling co-ordinated meetings with RSY and the South Yorkshire Partnership are already undertaken on a regular basis. Yorkshire Forward is working with York England and partners to establish a similar network in North Yorkshire, and Yorkshire Forward deals with partners on a group and individual basis in West Yorkshire and the Humber. Information is then disseminated through the IDO meetings. Further, Yorkshire Forward have encouraged all partners to attend the UKTI Conference in London on 29 June 2005 so that they can obtain a national perspective on Inward Investment, as well as facilitate the attendance of IDO officers at a national RDA/UKTI event at Lancaster House, London on Thursday 19 May.</p> <p>All new Inward Investment team members are meeting with partners in each of the sub regions to explain their roles and protocols and to reaffirm the relationship between Yorkshire Forward and each partner.</p>	<p>Already in place in South Yorkshire and work is continuing in North Yorkshire.</p> <p>Completed by September 2005. Meetings with partners are now a part of the induction process so will be ongoing for any new Inward Investment team member.</p>
	<p><b>Recommendation 8</b> To embed the focus on customers, all partners should work towards the achievement of an appropriate service standard, such as Servicemark, throughout the network by 2006. This will secure consistency of approach and high standards of customer service throughout the region.</p>	<p>Rather than Servicemark, Yorkshire Forward is pursuing a Customer First approach in line with the Better Deal for Business Framework. Yorkshire Forward also encourages all other partners to work towards this service standard, to ensure consistency and quality. This could be broached through the RMF and IDO meetings as a starting point. Yorkshire Forward welcomes the involvement of the YHA in pursuing this objective.</p>	<p>Customer First implementation already in train at Yorkshire Forward - to be completed by February 2006. Encouragement of other partners to pursue similar objectives to commence July 2005.</p>

Recommendations	Actions	Timescale
<p><b>Recommendation 9</b> Yorkshire Forward and partners should identify measures to support the development of the "virtual team" across the region- this should include induction programmes for key staff which involve visits to key stakeholders and sharing of best practice.</p>	<p>See response to Recommendation 7.</p> <p>Our Key Account Management Programme, which involves Local Authorities in attracting Inward Investment into the region, is also feeding into this.</p>	<p>Already in train.</p>
<p><b>Recommendation 10</b> Partners across the region should agree a set of performance indicators and standards, building on the Tier 3 targets and compiled on the same basis, so that there are accurate and consistent statistics on regional performance on marketing and inward investment activity. YHA and Yorkshire Forward should lobby for consistent performance indicators at national level, if appropriate.</p>	<p>The new Targetry Framework agreed with DTI includes a core output on the number of new businesses created and/or attracted to the region.</p> <p>Yorkshire Forward would encourage Local Authorities to develop similar targets through the Local Enterprise Growth Initiative element of Local Area Agreements. We seek the YHA's help in securing agreement to this.</p>	<p>April 2005 onwards</p>
<p><b>Recommendation 11</b> Yorkshire Futures should explicitly monitor and evaluate the sustainability impacts (economic, social and environmental) of inward investment activity and report on this in Progress in the Region. All partners should include sustainability considerations as part of the assessment of whether an individual project should be supported to go ahead.</p>	<p>Progress in the Region already covers sustainability impacts and it would be difficult to ring fence Inward Investment issues. It is worth noting that sustainability issues are already addressed through grant programmes and that the YF Sustainable Development team is involved where appropriate by the Inward Investment team on any new proposal or project.</p>	<p>Ongoing</p>

## 10. Appendices

### Appendix 1 - Brief: Marketing and Investment Scrutiny Enquiry

1. This scrutiny enquiry will consider the extent to which regional marketing and investment activities have contributed to achieving the aspirations set out in the Regional Economic Strategy (RES).

#### Background

2. Objective 3 of RES is to attract and retain more private and public investment in the region by providing the right product for investors and more effective marketing of the region. This objective has been translated into 2 main areas of work for Yorkshire Forward:
  - marketing of the region, and
  - activity to attract, retain and embed inward investment.
3. The scrutiny enquiry will examine Deliverable (A) More Effective Marketing of the Region, with a specific focus on the annual "Yorkshire- Alive with Opportunity!" marketing campaigns:

*Powerful **marketing campaigns** will promote a strong and positive identify for Yorkshire and Humber at home and abroad, making full use of the "Yorkshire - Alive with Opportunity!" brand and building on local assets and resources.*

4. Deliverable (B) Increase, Retain and Embed Foreign Investment in the Region, states:

*Core inward investment activity will be integrated into cluster development and sub-regional delivery, with pro-active proposition based marketing targeted on companies that will strengthen key clusters and invest in flagship property projects as anchor tenants. Priorities to embed investment will include **high quality aftercare and investor development programmes** focused on existing as well as new companies, and programmes to **link skills development to investor needs**, including rapid reaction elements operating between the announcement and arrival of a major investment.*

*Regional **supply chain initiatives** will make the best use of local resources and products, integrate them into investor supply chains and seek higher value added contracts for existing businesses. The region will seek to **connect foreign investment to the region's science and research base** to strengthen the long term commitment of investors to Yorkshire and Humber.*

5. Lead roles for the deliverables and 3 year actions are as follows:
  - Yorkshire Forward have the lead role in the “Alive with Opportunity!” marketing campaigns, aftercare and investor development programmes
  - Yorkshire Forward have a joint lead role with the Universities/HE providers on supply chain initiatives and connecting to the science and research base
  - the LSCs lead on linking skills development to investor and community needs
6. The Regional Economic Strategy highlights that businesses will create the wealth needed to achieve the economic improvement targets the Strategy seeks. A key productivity challenge for Yorkshire and Humber is to increase investment both from abroad (Foreign Direct Investment) and also from within existing businesses.
7. Although marketing and investment is not one of the top ten priority actions for the region between 2003 and 2006, its importance is reflected in the Tier 1 targets for the region (to be achieved by 2010) which include a trebling of investment, with specific tier 2 targets of 620 active cases and 98 successful investment projects by 2005.

### Scope of this Enquiry

8. This enquiry will consider the effectiveness of both regional marketing and inward investment initiatives across the region and their contribution to achieving the aspirations set out in the RES.
9. The regional marketing element of the enquiry will focus on activity to build the profile of the Yorkshire and the Humber region. It will not include marketing aimed specifically at tourism.
10. The investment element will focus on 2 areas:
  - activity to attract Foreign Direct Investment (FDI) to the region; and
  - activity to encourage existing investors to remain in Yorkshire and Humber and make further investments here.
11. The enquiry will:
  - Evaluate the effectiveness of Yorkshire Forward’s activity on regional marketing, investment and aftercare from the agency’s establishment in 1999 to the present.
  - Assess how effectively Yorkshire Forward’s regional marketing and investment activity inter-relates and links with closely related areas of Yorkshire Forward activity such as clusters and property.
  - Assess how well Yorkshire Forward’s regional marketing and investment activity is “joined up” with other regional, sub-regional and local activity.

- Assess the effectiveness of inter-regional inward investment activity
- Examine whether the totality of regional marketing and investment initiatives for the region will enable the objectives laid out in the RES to be achieved.
- Examine how regional marketing and investment activity has taken account of sustainable development.

## Outcomes

12. The review will deliver improved understanding of the way in which regional marketing and investment is managed in Yorkshire and Humber and its effectiveness to date in achieving the aspirations of the Regional Economic Strategy. This will help to inform future activity in this area.

Karen Hill  
26 May 2004

## Appendix 2 - Participants in the Scrutiny Review Process

### 1. Yorkshire and Humber Assembly

#### YHA Panel:

- Heather Garnett, North Yorkshire County Council (Chair of the Panel)
- David Andrews, Yorkshire Tourist Board
- Graham Titchener, Highways Agency
- Andrew Wood, Yorkshire and Humber Regional Environment Forum

#### YHA Supporting Officers:

- Karen Hill, Economy and Skills Policy Manager
- James Paton, Development Manager

### 2. Yorkshire Forward

#### Yorkshire Forward Panel:

- Richard Gregory, Deputy Chair (Chair of the Panel)
- Nic Dakin, Non Executive Board Member
- Tom Riordan, Director of Strategy
- Susan Johnson, Director of Business Development
- Theresa Lindsay, Head of Communications

#### Yorkshire Forward Co-ordination:

- Christine Hawkins, Gateway Officer

#### Yorkshire Forward Research Interviews:

- Theresa Lindsay, Communications
- Julia Paddison, Investor Aftercare
- Anthony Phillips, Inward Investment
- Adam Pritchard, Investment Aftercare
- Adam Purser, Inward Investment

### 3. Stakeholders

#### Stakeholder Public Enquiry Hearing:

- Chris Corner, Renaissance South Yorkshire
- Tim Hazeltine, Doncaster MBC
- Ivan Hinchliffe, North East Lincolnshire Council

#### Written Evidence Submissions:

- Kevin Pickup, Director of Development, The Coal Authority
- Graham Titchener, Planning Manager, Highways Agency
- PM Walsh, Chief Executive, Harrogate Borough Council
- Patsy Kays, European Policy Manager, Hull City Council
- Anne Morgan, Business Development Manager, Leeds City Council
- David Edmondson, RIDO, Rotherham MBC
- Vivien Dennis, Development Officer, Sheffield City Council
- Chris Corner, Head of Marketing/Inward Investment, Renaissance South Yorkshire
- Patrick Wiggins, Director of Regeneration and Housing, North East Lincolnshire Council
- Jeff Pickering, Economic Development Officer, Barnsley Development Agency
- Margaret Coleman, Learning and Skills Council Yorkshire and Humber (Regional Response)

#### People who were interviewed or submitted email responses to detailed questions:

- Chris Corner, Renaissance South Yorkshire (Marketing and Investment)

- Kevin Reed, Renaissance South Yorkshire (Marketing and Investment)
- Dave Taylor, York and North Yorkshire Inward Investment Board - Marketing
- Denise Dodd, York and North Yorkshire Inward Investment Board - Inward Investment
- Jeff Pickering, Barnsley Development Agency
- Andrew Ainsworth, Barnsley Development Agency
- Anne Morgan, Leeds City Council
- Rob Norreys, Leeds City Council
- Gill Sinclair, Hull City Council
- Stephen Taylor, Humber Forum (Humber Trade Zone)
- Chris Howell, Humber Forum (Humber Trade Zone)
- Simon Green, North Lincolnshire Council
- Chris Ladley, East Riding of Yorkshire Council
- Alan Menzies, East Riding of Yorkshire Council

## Appendix 3 - Glossary

AMP	Advanced Manufacturing Park (in Sheffield)
CRM	Customer Relationship Management
DTI	Department of Trade and Industry
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GVA	Gross Value Added
HEIs	Higher Education Institutions
HTZ	Humber Trade Zone
PR	Public Relations
R&D	Research and Development
RDA	Regional Development Agency
RES	Regional Economic Strategy (Yorkshire and the Humber)
SFI	Selective Finance for Investment
UK	United Kingdom
UKTI	UK Trade and Investment
US(A)	United States (of America)
USP	Unique Selling Point/ Unique Selling Proposition
YAWO	Yorkshire Alive With Opportunity!
YF	Yorkshire Forward
YHA	Yorkshire and Humber Assembly
YHDA	Yorkshire and Humber Development Agency

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