

Mark O'Reilly CEO & Chairman



About us:



Capitalising on the Humber estuary's natural assets, members of Team Humber Marine Alliance have combined their strengths to provide a comprehensive supply chain offer to the Marine and Offshore industries.

The Humber is the largest ports complex in the UK and the fourth largest trading estuary in Europe, and plays a pivotal role in the UK energy sector.

THMA are based at the World Trade Centre Hull & Humber adjacent to "The Deep"

"We have facilitated £millions of new business for our members through our business development activities"

Strength in Numbers:



- ** THMA is a "not for prof t" organisation with 6 Directors with vast experience in the Marine, Manufacturing & Engineering Industry
- * Private sector led working in collaboration with the Public sector
- * 200+ member companies directly employ over 17,000+ people
- Collaboration is our key strength from informal networking to formal legal frameworks available to members unincorporated joint ventures
- Strong focus on Offshore Wind sector manufacturing, engineering, marine, O&M

Background:



- * Alliance now 19 Years Old
- * Focus on Business Development to support commercia activity & stimulate growth.
- * To enhance skills and encourage job creation
- ** To promote awareness of the Marine & Offshore Sector
- ** To Collaborate "Strength in Numbers"
- * We have the full support of "all" Humber local authorities



Our Patron: the Rt. Hon. Alan Johnson MP



What we do!

- Team Humber Marine Alliance is like an extra marketing arm for our members.
- Provide market intelligence and advice
- Be the voice of Humber companies, enabling members, through the THMA brand, to compete for major contracts at a national and international level, collectively and individually
- Promote the capabilities and experience of its members and represents them at key industry events
- Lobby on behalf of members at Government level
- For potential customers, the Alliance acts as a single access point to the broad range of skills available in the region.
- Networking opportunities & workshops
- Source funding streams
- Promote skills training
- Promote International Trade



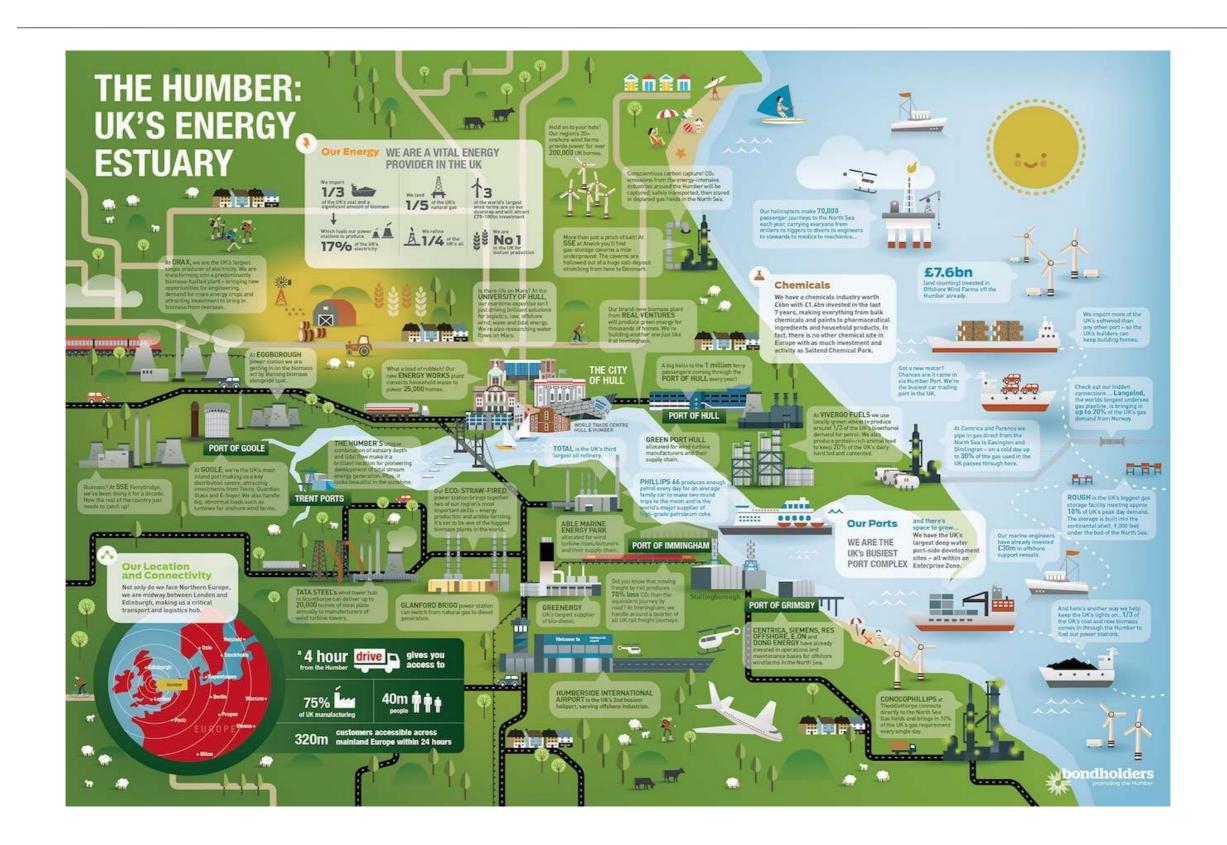




"Our key activities focus on representing members and the region at national and international exhibitions and conferences, developing skills, providing opportunities, collaborating on tenders for large contracts and attracting global players in appropriate industries to visit the region".



The Humber: UK's Energy Estuary





"Two" new Humber Port Complexes





Green Port Hull – a £310m investment at Alexandra Dock which will create new quays and a Blade manufacturing facility for Siemens Wind Power employing over 1,000 directly. Open during 2016/17

Able Marine Energy Park – a £450m investment creating 1,389m of new heavy duty deep water quays and 366.7 hectares (906 acres) of developable land. It is designed specifically for the marine renewables sector and is expected create 4,000 jobs in the region. Open late 2017 early 2018



Partners & Aff liations

































W Regional Growth Fund





Members of:











"Some of our members"

TATA STEEL





















































Capabilities:

- Steel Fabrication (added value)
- Steel Production and supply
- Ships Surveys and Repairs
- Towage and Salvage
- Drilling Rigs
- Marine Doors, Hatches and Deck Machinery
- * HVAC
- Instrumentation
- Corrosion Prevention/Coatings
- Legal services
- Recruitment
- Offshore Training
- Engineering training



























- Ship Repair, Conversion and New Build
- Marine Engineering
- Marine Electrics & Electrical Communication
- Valves
- Rigging
- Marine Hydraulics
- Subsea Engineering/Dive support
- Naval Architects and Marine Consultants
- Offshore Wind Farm Supply Chain















Offshore Wind Supply Chain Support & Services

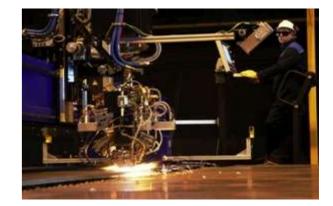
The region is a growing centre for O&M activity and there is a broad base of Humber businesses involved in renewable energy with capabilities including:

- Fabrication and assembly
- Steel supply
- Port and portside services
- Turbine access & maintenance
- Vessel operation & charter
- Shipbuilding & Repair
- Offshore Engineering
- Marine Services
- Marine Electrical
- Offshore Training
- Specialist Logistics
- Legal & professional services

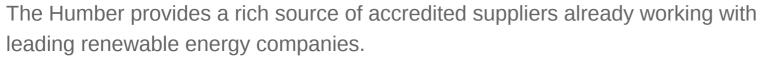












Recently approved Regional Growth Fund proposals will:

- Provide Business Investment Grants to lower location and expansion costs for Tier 1 and 2 supply chain companies
- Help local businesses to diversify and enter the renewable energy sector supply chain.





Offshore Wind Vessel Investments:







Dalby Offshore - £15m+ building fleet of 8 offshore wind support vessels

RIX Group - £10m+ building fleet of 5 offshore wind support vessels

MMS - £10m+ constructing new offshore wind support vessels fleet in Hull

SMS Towage - £10m+ in new tugs that have contributed to offshore wind installations including Thanet Wind Farm, London Array, HelWin and Belwind.

WindPower Support - £2m+ Offshore wind support vessels

Precision Marine Survey - £m Offshore Wind survey vessel



Offshore Wind Contract wins:







MTL Group - £10m+ Boat landing systems

Barrett Steel Offshore - £m's+ Humber Gateway fabrications

Point Group/Steelridge - £'s+ OW Cable reel fabrications

P&O Ferries - £m's+ Converted Ferry to Sea Hotel for Lincs project & new project in German North sea.

Cofely Fabricom GDF Suez £m's+ Fabrication work Lyn & Inner Dowsing

Carlbom Shipping - Port Agents & Marine Support, Westermost Rough



Our activities





We have provided over 1,000 business opportunities to our members with associated bid writing support and training

We have hosted events with speakers from the Crown Estate, Siemens, E.ON, Mainstream Renewable Power, DECC, Strabag, Able UK, Vestas, RenewableUK, SMartWind, GeoSea, AREVA Wind & Hochtief

We have hosted visits from Babcock Marine, BVT Surface Fleet, MoD Royal Fleet Auxillary, KBR, Mid Norway Wind Cluster, AREVA Wind, DONG Energy, Danish Embassy, WAB Germany/germanwind, Nordic Offshore & various Danish delegations

Exhibited with members in UK & Europe - Aberdeen, Manchester, Glasgow, Southampton, London, Denmark, Sweden, Germany, Belgium and Poland.

Formation of member sub-group focusing on Offshore Wind Operations & Maintenance

Formed a member **Manufacturing** sub-group looking at potential opportunities for Offshore Wind structures and equipment











THMA Offshore Wind Trade Mission – Northern Germany

15-18th April 2013 – Offshore Wind Trade Mission to Bremerhaven & Hamburg visiting AREVA Wind, Weserwind, Mitsubishi, E.ON Climate & Renewables, GE Wind and Hamburg Renewables Cluster. We were joined by **BBC TV and Radio** who broadcasted and reported on the mission back to the UK.



THMA Offshore Wind Trade Mission – Denmark

2-5th Sept 2013 – Offshore Wind Trade Mission to Denmark 20 member companies visiting Port of Esbjerg, Blue Water Shipping and Siemens Wind Power, Brande











THMA Annual "Offshore Wind Connections Conference & Forum"

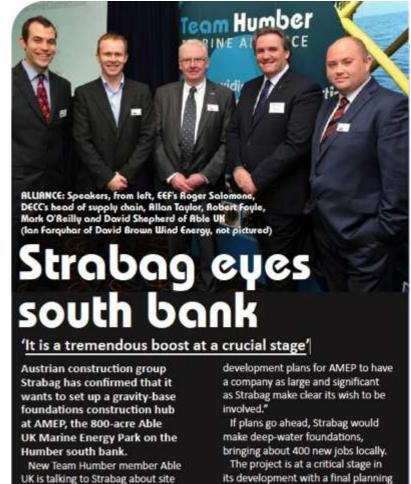






THMA continued in 2014 with its Annual "Offshore Wind Connections Conference & Forum. This year combining it with a regional RenewableUK member connect event. Over 200 delegates heard updates on the industry from Offshore Wind Investment Organisation, RenewableUK, AREVA Wind, SMartWind and ABLEUK.

2015 will see speakers from ABLEUK, Siemens, DONG Energy, A2SEA & Forewind



requirements while further details

executive for UK and Ireland, at

the THMA-hosted Offshore Wind

boost at this crucial stage in our

were revealed by Robert Foyle, Strabag

Connections event at Brigg on April 24.

Able group development director Neil Etherington said: "It is a tremendous

offshore wind business development

decision expected in July.

organisation.

Mark O'Reilly, director, THMA,

said: "This would be a huge new ports complex with opportunities for

companies right through the supply chain, from ports and marine to

Offshore Wind Connections, was supported by EEF the manufacturers'



Upcoming Events:

February 10th – SSW Renewables Skills Gap Group Meeting, Hull February 12th – Green Port Growth – Offshore Wind Health & Safety, Working Offshore & Vessel safety, Hull February 18th – THMA/RenewableUK UK Election Tool Kit & debate, Hull June 4th – THMA Offshore Wind Connections Annual Conference, Bridlington Spa

Exhibitions organised 2015:

March 10-12th EWEA Offshore 2015, Copenhagen (Humber Renewables)
May 6-7th – All Energy, Glasgow (Humber Renewables)
June 16-8th – Seawork International, Southampton
June 24-25th – Global Offshore Wind, London (Humber Renewables)
September 8-1th – Offshore Europe, Aberdeen
October 6-8th – RenewableUK 2015, Liverpool (Humber Renewables)
November 17-20th November – EWEA 2015, Paris (Humber Renewables)

Promotion and awareness: THMail (Quarterly Newsletter)





THMA in the Press:



THMA has had excellent coverage in local, regional and national press



Future Skills Development Marine & Renewables







Humber University Technical College (Renewables & Engineering) – Scunthorpe:

THMA are sponsors and involved in the Project Steering Group... the college is due to open September 2015. Other sponsors include ABLEUK, TATA Steel, Centrica Storage, University of Hull

Humber Marine Academy:

Virtual academy to promote industry and provide pathway for careers in the Marine/Offshore industry including offshore wind crew, deckhands, skippers, pilots, stevedores

Hull College – Ports & Logistics Sector Lead as part of SSW:

Working with companies to understand their training requirements and encouraging them to upskill

Hull Training – THELMA Project:

Apprentices building vessel for Lord Mayor with support of THMA members



"Working in Collaboration"

What is collaborative working?

"Cooperative effort by a number of companies to achieve a common goal"



Winning new business is tough and getting tougher!!





Sometimes "we" is better than "me"!

On your own!



Sometimes innovation, quality, price and service just isn't enough to grow your business?

Public and private sectors are restructuring their supply chains:

- Aggregating their spends
- * Fewer suppliers (Vendor reduction programmes)
- Seeking to reduce transaction costs
- Accessing the world wide market
- Pricing based upon low cost sources.

Collaborate rather than compete!



"Challenges"

Opportunities are out there but:

- some may be too large
- some are in unfamiliar territory
- you have limited time to review the detail of each opportunity
- you are unfamiliar with the tendering process
- working with other companies is new to you
- * there must be many issues to overcome in collaboration

"Result – you could miss out on opportunities and new business"



What are the benefits of collaborating?

- Go for work you may not otherwise have considered
- Capability and capacity without recruiting
- Potential for legacy work through new contacts
- Funding
- Sharing of knowledge and ideas
- Sharing of risk and potential outlay
- Increased satisfaction of working with others



What are the benefits of collaborating contd.

- Increased management capability
- Progressive ideas
- Shared resources for tenders and proposals
- Shared costs vans, people, marketing etc
- Two heads are better than one
- Greater market weight and presence



What are benefits to the Customer?

- Single point of access
- Ease of managing the contract
- Broad range of skills individually or as a group
- Faster decision making
- Small business commitment big business capability
- Flexibility what the customer needs when they need it
- Technical and managerial capacity





Informal business collaboration

It is crucial for small businesses to keep abreast of industry developments and build new relationships by engaging with appropriate business peers, networks and associations.

Business Networks

Team Humber Marine Alliance
Hull Bondholders
Humber Chemical Focus
Grimsby Renewable Partnership

Trade Associations & Institutes

EEF The Manufacturers Organisation
Maritime Skills Alliance
RenewableUK
Institute of Mechanical Engineers
Institute of Marine Engineering, Science and Technology
National Workboat Association



Typical forms of collaboration for SME's

- * Strategic alliances
- * Technology transfers often working with Universities
- * Sales and distribution partnerships
- Joint R&D and product development partnerships
- * BS11000-1 new standard for "collaborative business relationships" http://www.bsigroup.co.uk/Documents/bs-11000/BSI-BS11000-Product-Guid
- * Joint ventures
- Un-incorporated joint ventures (see next page)



Types of Collaborative Relationships

Forms of Collaborative Relationships	
Informal or semi-formal agreement	"Ryanair recommends Hertz."
Project-focused alliance	Very large-scale civil engineering/construction projects
Product-focused alliance	Roche markets "Zantac" for GSK in USA
Service-focused alliance	The three major global airline alliances
Joint design-research- development	Philips/Sony in pre-competitive phase of DVDs
Joint/parallel production	Fiat (I) and FSO (PL) "Cinquecento"
Cross-invested operations	KLM with NWA
Joint marketing	Airline/hotel/entertainment "packages"
Joint branding	Credit Suisse First Boston (before CS purchase of FB)
Subcontracting	Codeshare flying
Licensing	Anchor Malaysia brewing Guinness in Kuala Lumpur
Franchising	Holiday Inn and several other hotel chains
Supply chain linkages	"Guest engineering" in many manufacturing sectors
Joint venture company	Airbus



Formal business collaboration for SME's

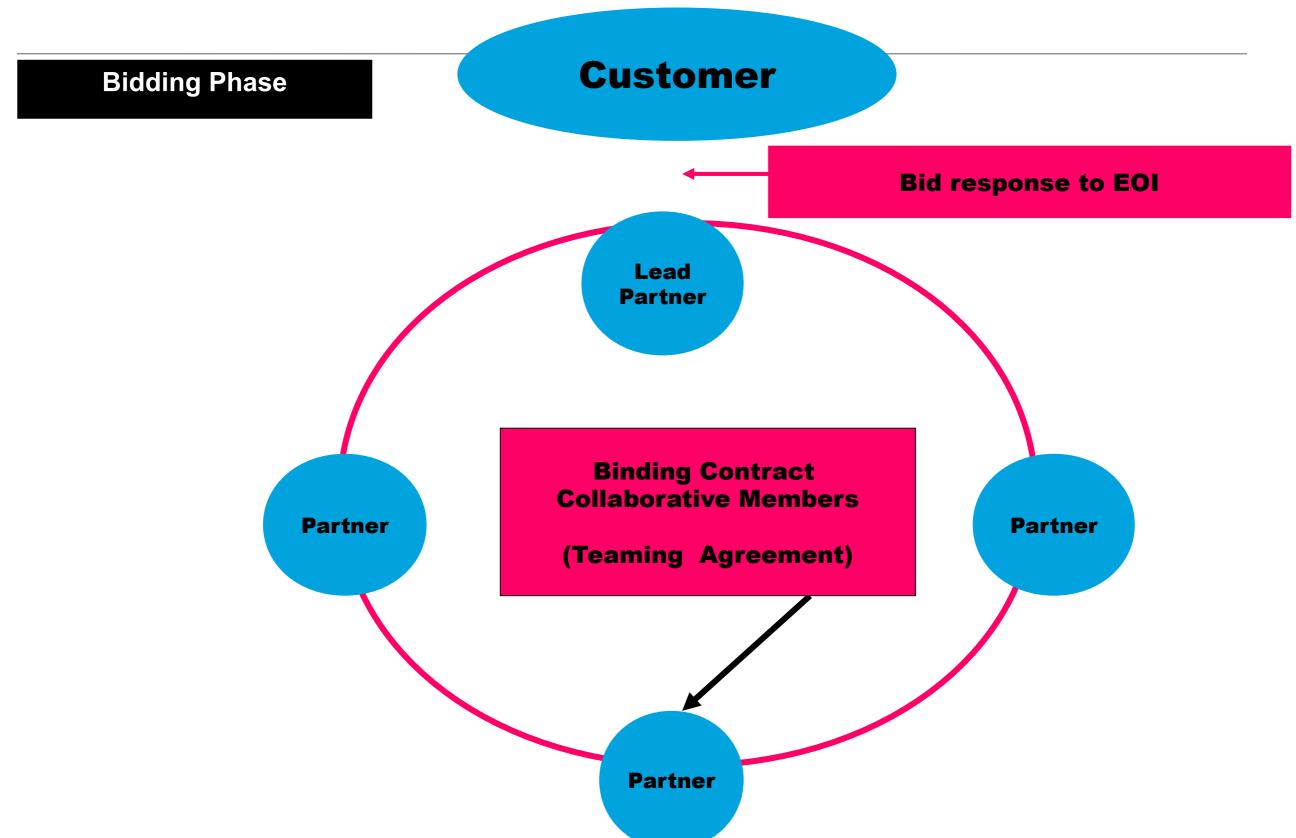
Collaboration isn't just for large corporations!

For tenders involving two or more SME's a two stage engagement process can be followed:

Initially sign Non Disclosure and Confidentiality Agreement (NDA) followed by:

- (1) Pre Tender Teaming Agreement (including Work-share Agreement)
- (2) Post Tender Standard Partnering Agreement







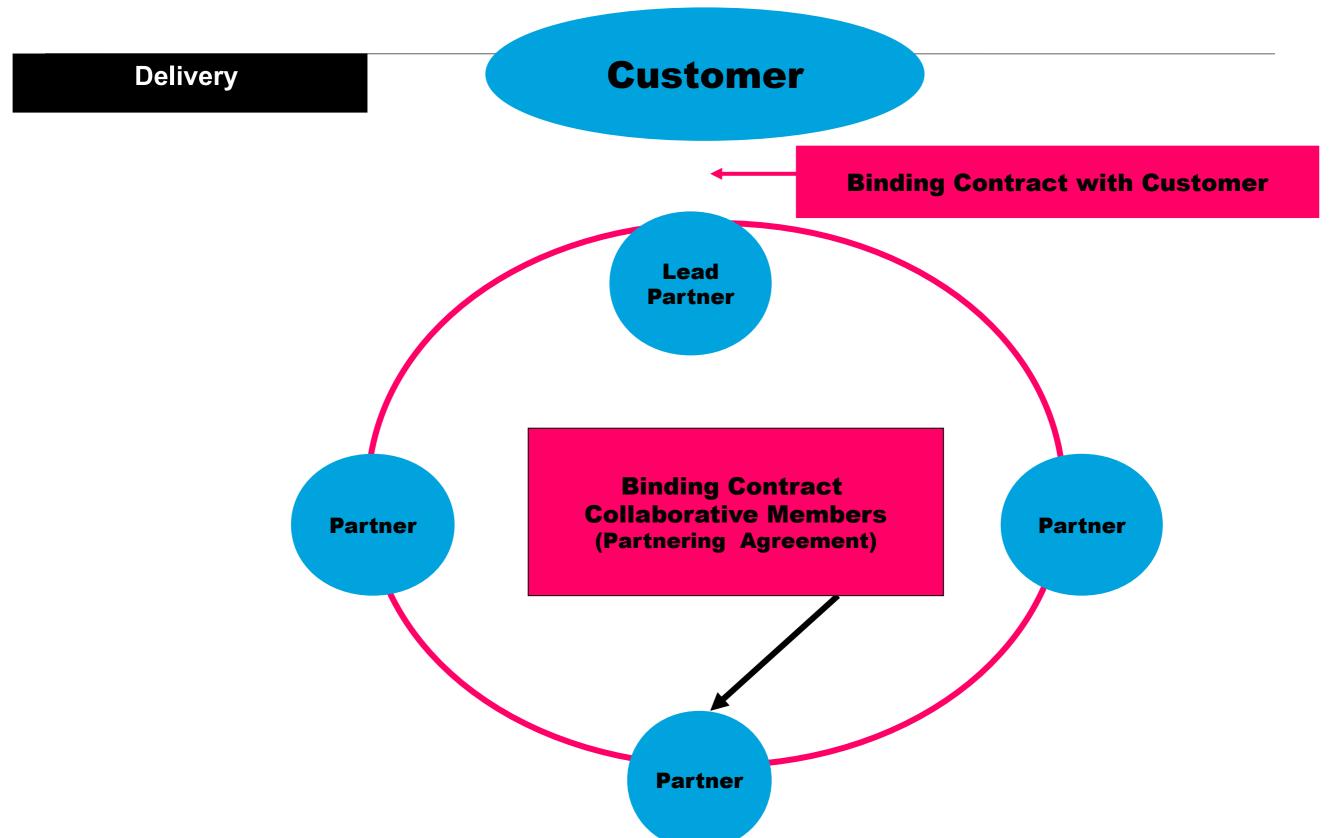
The Teaming Agreement (Pre-tender)

- Intellectual Property Issues
- Commercial Confidentiality
- Effects of withdrawal & termination
- Warranties
- * Personnel
- Assignment
- Publicity
- Dispute resolution

Workshare:

- Is an Appendix to the Teaming Agreement
- Defines who is responsible for sections of the contract
- Defines how the contract is to be delivered
- Can be amended by agreement







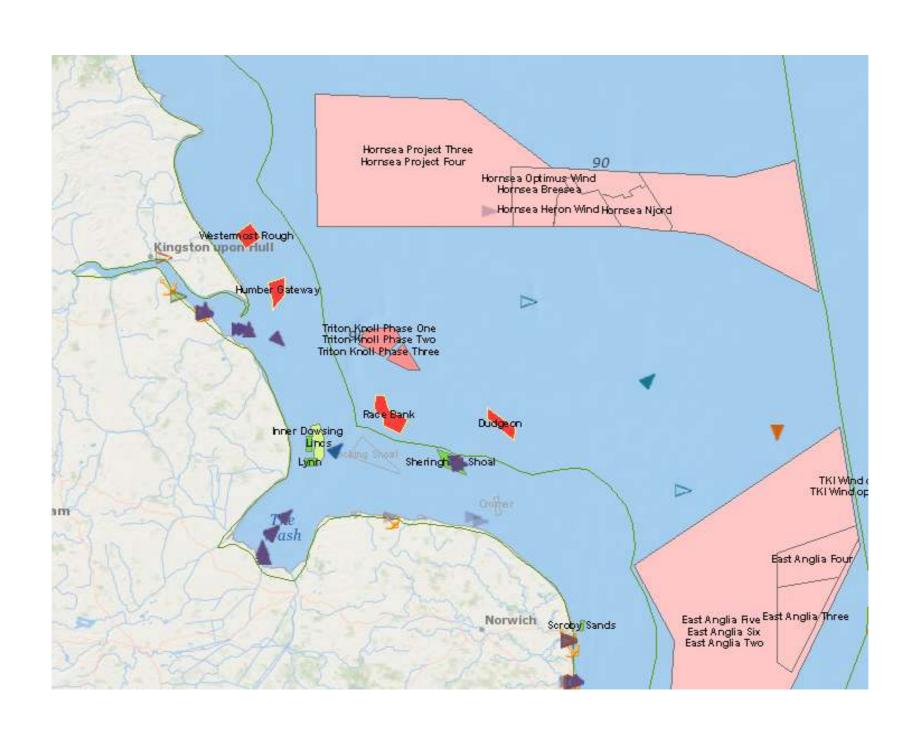
The Partnering Agreement (Post-tender)

Covers...

- Partner's Obligations to the Lead Partner
- Lead Partners Obligations to the Partners
- Goods and Services to be supplied
- Intellectual Property Rights
- Payment



Offshore Wind Collaboration in Practice!





Collaboration in the Offshore Wind Sector



Dogger Bank: RWE npower, Statkraft, Statoil & SSE



Hornsea: Siemens, Mainstream Renewable Power & DONG Energy



Offshore Wind concrete gravity foundations: Hochtief, Costain & ARUP



GreenPort Hull: Siemens, Hull City Council, East Riding of Yorkshire Council & the University Of Hull



Collaborative working – Offshore Wind farms

Lincs Wind Farm Ltd – 75 Siemens 3.6mw Turbines

A collaboration between 3 companies Centrica & DONG 25% Siemens 50%









"Lincs Wind farm Supply Chain"



































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"Greater collaboration is a key prerequisite for new ways of working. The supply chain must embrace collaborative working as opposed to adversarial working"

Crown Estate - Offshore Wind Cost Reduction - Pathways Study



Thank you

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