



HIGH SPEED RAIL INDUSTRY LEADERS

High Speed Rail
Grasping the opportunity

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Introduction



High Speed 2 is one of the biggest opportunities for Britain in decades. As well as providing the country with a new world class north-south transport link, the project provides opportunities for thousands of businesses, big and small, all over the UK.

These opportunities can be used to create new jobs, invest in skills and grow the economy. As well as delivering HS2 itself, these new skills can help build the UK as a centre of excellence and help nurture our position as an exporter of the skills needed to build high speed rail at a time when it is a growing sector across the world.

This report considers how these opportunities can be secured. They need to be spread far and wide, all across the UK and across many industry sectors. They should be open to companies used to working within the rail sector as well as new entrants.

High Speed Rail Industry Leaders (HSRIL) has produced this report following a series of focus groups, meeting small businesses in Manchester, Derby, Ashford and Northampton. The report discusses the opportunities businesses associate with the project, as well as identifying the challenges that need to be overcome.

As the representatives of the tier one suppliers, HSRIL recognise that its members have a particular responsibility in terms of making sure SMEs benefit from the construction of HS2. The clear feedback from the events is that

businesses recognise there is a major opportunity from HS2. Discussions at all four sessions identified the following areas where HSRIL members can offer support to SMEs:

- Ensuring businesses have the right skills and the right resources;
- Simplifying procurement processes;
- Building relationships and confidence for the opportunities long before tendering processes commence.

This report discusses each of these big issues in turn. The views set out are not those of HSRIL members, but of the SMEs we spoke to in the process. It sets out honestly and transparently the opportunities and obstacles they told us about, and sets out how we can help the wider industry supply chain to grasp the HS2 opportunity.

HSRIL Directors

Jim Steer

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The focus group events

Four focus group events were held across the UK.

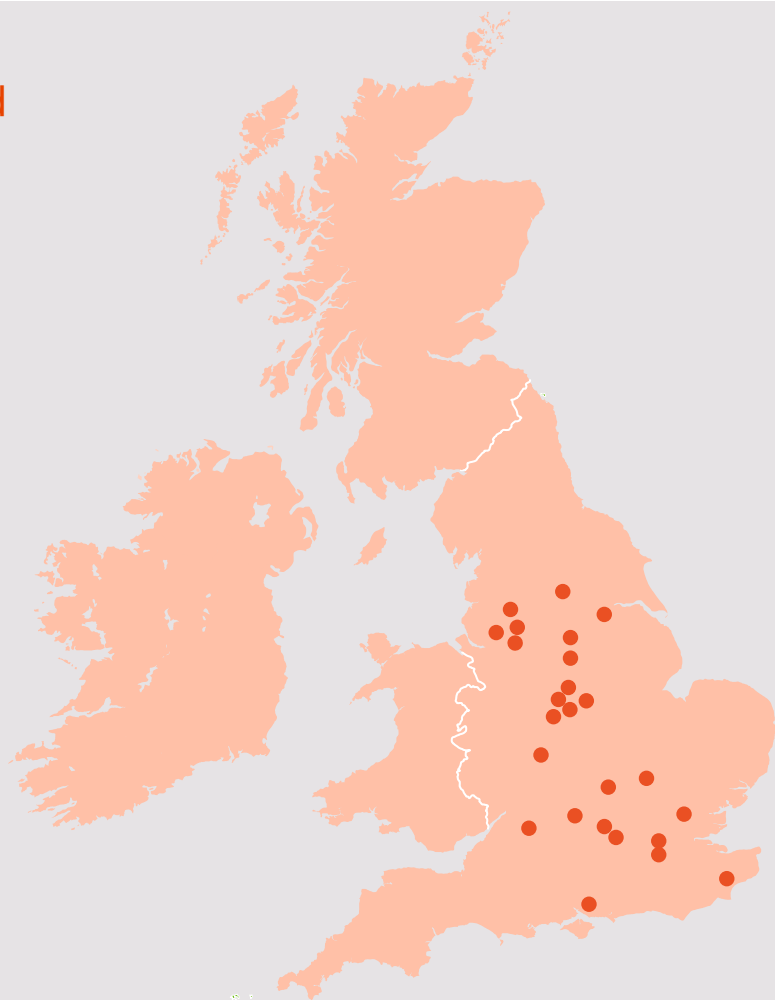
These were hosted by Alstom in Manchester; by Bombardier in Derby; by Hitachi in Ashford; and by Siemens in Northampton. These locations were chosen to reflect a balance between towns with established rail supply industries, emerging rail locations and one location on the HS1 line of route.

The objectives of the events were to understand the views of SMEs in respect of how they can make the most of the opportunities presented by the HS2 project; to establish an open dialogue and constructive conversations between larger businesses who have already entered the

procurement process and SMEs who have yet to do so; to share experiences of the procurement process and supply chain best practice; and to help build a wider understanding of where a diverse range of companies can connect into the supply chain.

The format of each group depended on the site location but all included informal networking opportunities; welcome from site host; discussions about key high speed rail topics including skills and regional benefits; presentation from a local supplier who has successfully harnessed a major infrastructure project in the past; open discussion and question and answer session; and a site tour or presentation from site host.

Geographic spread of attendees



Please see the inside back cover for a full list of attendees.

Big theme: how high speed rail can transform the skills base

Across the railway, the challenge of recruitment and retention is widely viewed as a top industry-wide priority. In recent months the Transport Industry Skills Strategy (TISS) and the Rail Supply Group (RSG) Sector Strategy have both sought to address this, and high speed rail is identified as a primary opportunity to lead in the upskilling of the industry as a whole.



The single most common theme emerging from the events lay in how the opportunities presented by the HS2 project can be used to transform the skills base of the companies that secure contracts, support recruitment of talented people and ensure long and varied careers for employees.

At the same time, it was recognised that whilst large, long-term contracts offer an opportunity for SMEs, the upfront investment required in skills can be a significant barrier.

The broader challenge of recruitment and retention is a concern shared by a number of businesses at every level of the supply chain. Finding people with the right skill set and the desire to remain in the UK has been a challenge across the board, with a number of UK trained engineers choosing to pursue work overseas,

often attracted by the lifestyle on offer as well as higher salaries.

The HS2 project, of course, has the opportunity to change that with a world class high speed rail project likely to be the first of several in the UK over the coming years. Our best engineers will no longer need to go abroad to find the most rewarding work.

This plugs into a wider question of future pipeline. In the past, businesses have been concerned about the stop-start nature of infrastructure investment in the UK. But with HS1, the Olympics, Crossrail and now HS2, it is clear the pipeline is becoming more consistent. Furthermore, the creation of the National Infrastructure Commission increases confidence of further projects to come.

The recruitment challenge has forced a number of SMEs to think outside the box and fund innovative solutions. The growth in apprenticeships in recent years is viewed universally as a positive development. All agree that this needs to accelerate further though, with more high-skilled apprenticeships and potentially longer schemes. On Crossrail, for example, large contracts came with apprenticeship obligations and we expect the same on HS2.

There is consensus that more needs to be done to encourage a more diverse set of people with different skills and from different backgrounds into the industry. The under-representation of women at senior levels was a persistent theme, and means the industry is failing to draw upon as wide a range of skills as possible. It was also discussed that there is a failure to attract people from other industries, and that too often rail experience was wrongly viewed as a pre-

Big theme: how high speed rail can transform the skills base (cont)

requisite. One area of success has been in recruitment from the Forces, which have a long track record of providing skilled people for the railways.

HSRIL response

Recruitment and retention is a challenge across the industry, amongst companies big and small. The HSRIL view is that high speed rail can be a catalyst for the upskilling of the industry as a whole.

We agree that there is an urgent need to diversify the sorts of people attracted into the industry so we are tapping into the widest possible talent pool. This means engaging with a far greater number of women and people from under-represented backgrounds, as well as people qualified in technology as much as those qualified in engineering.

In respect of the future pipeline, HSRIL members have a good deal of confidence as to the pipeline as set out in the National Infrastructure Plan and now in further development by the National Infrastructure Commission. There is clearly a task to ensure that the whole industry supply chain also understands what that future pipeline looks like, and the confidence it can

allow in investing in skills.

Key actions

1. We need to understand the particular contribution high speed rail can make to meeting the industry skills challenge, in support to the recent TISS and RSG reports. To that end, HSRIL will organise a national conference in Birmingham this summer to discuss the issue and finalise a clear industry-wide response to this substantial issue
2. HSRIL members will play our part in making sure the potential future pipeline of infrastructure projects is understood far-and-wide so that SMEs have the confidence to invest
3. We are determined to set an example in skills investment, particularly on HS2 contracts

'What came over was that we need to raise a positive image of, not only HS2, but the railway industry in general. We should be telling people of all ages, from school children upwards, as to what fantastic careers there are in the railway industry.'

David Brookes, Divisional Manager, Dellner



Case studies: Manchester & Derby



Manchester

PP O'Connor, a civil engineering business established in 1960, employs over 170 people and has a turnover of £20 million with their own plant and fleet of lorries. They spoke at our first focus group session in Manchester about their highly successful relationship working with major contractor, Laing O'Rourke, on their Liverpool 1 project, which at the time was the largest commercial regeneration project in Europe.

When initially approached PP O'Connor was reluctant to bid for the project finding the size and scale of the project a daunting possibility. But having won the project, largely due to the owner's ongoing investment in modern equipment, they quickly found the key to success was collaborative working, flexibility and innovation. The business found new ways to save money, took on more and more staff, invested in training and different kinds of services.

The project was highly successful and lasted for three years, and it built a lasting relationship with Laing O'Rourke as well fundamentally changing the way PP O'Connor did business. Importantly it gave them the knowledge and confidence to bid for further contracts such as Manchester Metrolink where went on to work with Laing O'Rourke for more than seven years.

'Collaboration is fundamental to maintaining a good relationship and ensuring success between a business of our size and organisations such as Laing O'Rourke.'

Rob Pugh, PP O'Connor

Derby

Garrandale Ltd is a rail engineering and chemical technology enterprise based in Derby, that had built a constructive and lasting relationship with Bombardier, forged through the delivery of Crossrail.

This had not initially been easy and had required the SME to consider fundamental changes to how they did business. For Garrandale the key to successfully delivering the Crossrail project came from integrating with Bombardier on both a formal and informal level. They quickly built the confidence they needed to see themselves as an equal in the partnership, which meant that they could ensure they were part of the decision making process and able to forge a good relationship that worked well for them, as well as Bombardier.

As a result of working on the Crossrail project, Garrandale understood the need to invest in skills and innovation, as well as explore new ways of doing things. They continue seek new opportunities to grow and are prepared for change, as it is their belief that getting the culture of your business right is paramount, if SMEs want to successfully work with larger providers.

'SMEs in the past may not have responded quickly enough to changes in the business world. Getting the culture right is important if SME's want larger companies to respond.'

Malcolm Prentice, Garrandale Ltd

Big theme: making procurement work for SMEs

Procurement processes have come a long way in recent years, with far greater effort to increase communications, transparency and offer access to a wide range of suppliers. Both the Olympic and the Crossrail procurement processes moved the industry on a long way, and HS2 can be the next step change.



On the HS2 project, smaller companies will largely be contracting to tier one suppliers such as HSRIL members – rather than to HS2 Ltd itself. This means HSRIL members have a particular responsibility in terms of making sure SMEs benefit from the construction of HS2.

A consistent theme emerging from the focus group events was the fact that whilst improvements have definitely been seen in recent years, many smaller businesses still find the procurement processes on large projects intimidating, time-consuming and bureaucratic.

In particular, the short timescales for producing bid documents, the complicated contractual terms, and compliance with financial and banking requirements, are viewed by some as a disincentive to bidding for contracts in the first place.

Moreover, as in many cases they are bidding to tier one suppliers (rather than to HS2 Ltd themselves) SMEs are concerned about the requirement to go through multiple pre-qualification and registration processes to different suppliers on the same project. The idea of a generic Pre-Qualification Questionnaire (PQQ), or at least greater commonality in PQQ requirements, was discussed favourably by SMEs.

The experience of Crossrail procurement was favourably commented upon at several events. Crossrail is one of the biggest transportation projects in Europe, with a project value of around £14.8 billion. Many businesses had previously bid on Crossrail, and were pleased to hear that 95% of the contracts on that project had been won by UK-based firms. Crossrail's engagement was viewed constructively and positive lessons from that project are now being taken forward by HS2 Ltd.

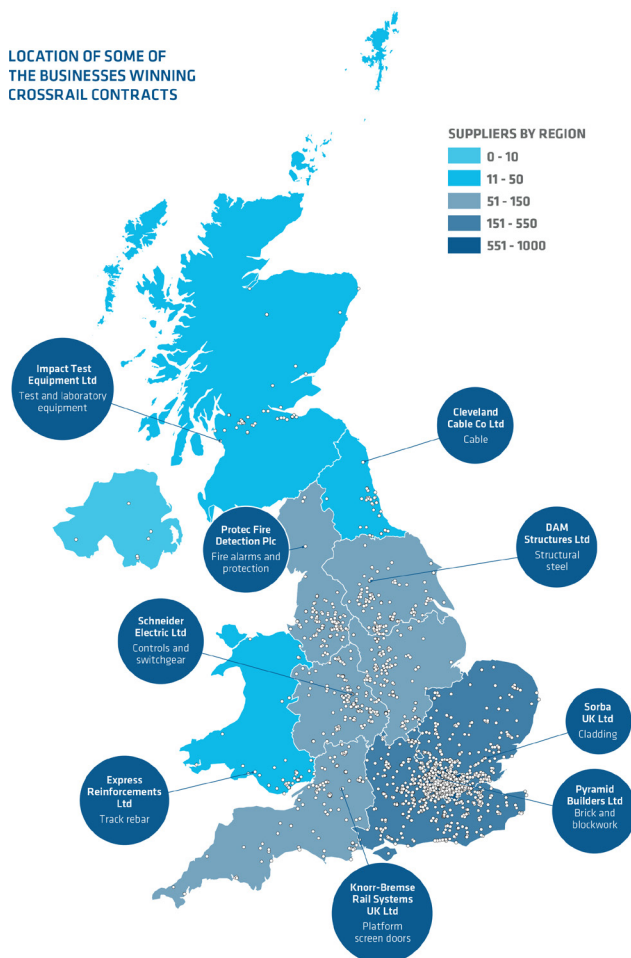
Many feel that mandating is the best mechanism to ensure SMEs are part of future major infrastructure projects. Some suppliers felt that a look needed to be taken at Compete For system to improve navigation and feedback mechanisms.

However, CompeteFor is cited as being a key factor in supporting UK based businesses, in particular SMEs, who tender for business on the project. It also plays a key role in why Crossrail do have a high UK content.

'HS2 is a good thing for the UK economy but there are some barriers for businesses lack of knowledge, lack of detailed information, lack of clarity and transparency for SMEs in particular and how they can get involved and who they should be talking to.'

Richard Carr, Mechan





Map supplied by Crossrail Ltd, March 2016

‘Nomad Digital is keen to engage with and support the HS2 programme. Supply chain events such as this enable us to better understand the requirements of this important project and collaborate with key stakeholders and participants. At the most recent event, our discussions with HSRIL members regarding the communications requirements of the infrastructure providers during the build phase opened up a new, potentially exciting opportunity for Nomad.’

Nick Watson, Nomad Digital Ltd

HSRIL response

HSRIL members fully recognise their own responsibility for making procurement processes as streamlined as possible to help SMEs bid for contracts on the HS2 project. The vast majority of SMEs working on HS2 will be as sub-contractors to tier one suppliers, rather than directly to HS2 Ltd themselves, and this gives us a particularly important role to play.

Our view is that improving procurement is primarily about two things – communication and process. In terms of communications, we think that maintaining the dialogue with smaller suppliers is critically important so we are able to understand a “running commentary” of how they feel the processes are going.

Key actions

1. HSRIL members will review our procurement and pre-qualification processes to seek to achieve a higher degree of consistency and commonality between us. This will make it easier for SMEs to bid to multiple HSRIL members
2. HSRIL support HS2 Ltd’s aim to maximise opportunities for SMEs, and will work with the company to remove barriers to SME participation and seek to facilitate SME involvement.
3. HSRIL will seek to offer early visibility of the pipeline of opportunities to the wider supply chain

‘The delivery of HS2 will be a good thing for the economy but SMEs have to be heard and linked in to the process. If SMEs are not involved this will be to the detriment of HS2.’

Sue Whittal, Head of Business Development, Asplin Group

Case studies: Ashford & Northampton

Ashford

Luccini UK, a supplier of wheel sets for high speed trains, set the scene at our Ashford event as they explored how a major project, HS1, had helped to transform their business and allowed them to invest in skills and people.

Luccini identified early on that developing a reputable product would be key to their success. Working closely with HS1, and establishing clear lines of communication, Luccini were able to ensure that the product was effectively delivered on time.

In order to deliver this major project Luccini also recognised a skills gap within the business that needed to be addressed. As a result, they developed their own apprenticeship scheme, that created a system where employees from their Doncaster and Manchester sites spent time working on the Ashford project, in order to build a thorough understanding of the high speed project and the supply chain, as well as share best practise and learn new skills.

Being part of HS1 delivery has resulted in the introduction of new structures and methods, and to some extent a new culture within Luccini, which has placed them in an excellent position to bid for and deliver other major infrastructure projects.

Northampton

Siemens held its HS2 supplier day at the National Training Academy for Rail (NTAR) in Northampton, which plays a leading role in addressing skills shortage in the railway industry by delivering new railway skills development programmes. Liebherr Transportation's business, one of the main suppliers for Siemens' Thameslink trains, was the focus of the discussion. The family owned company, based in Switzerland, entered the UK market in 1997 with the desire to grow service facility centres in London.

In 2012 they won a major ten-year contract with Siemens to supply and maintain the air-conditioning systems for the Thameslink rolling stock programme, which was a "game changer" for the business. The company had to really understand how they could add value to the Siemens Rail Systems operation in the medium to long term, as well as be resource efficient. This began by working closely with Siemens to at first develop a vision of their ideal support facility. This was followed by jointly developing a whole life cost budget for the maintenance and service of the equipment, using well established techniques.

As a result of winning the contract, Liebherr Transportation was able to increase recruitment and address a skills gap within the business by employing new specialist engineers, as well as developing a significant training programme for their existing staff. This has included ensuring staff are multi trained in Electrical, Mechanical and Hydraulic fault finding and repairs and are even learning German to improve communication within the project group.

The key to building a successful relationship between Liebherr and Siemens has come from early engagement and encouragement to form strategic partnerships, which has allowed the business to invest long-term.

'The long term nature of the Thameslink maintenance contract, and the vision and support shown by Siemens, has stabilised the UK arm of our business and enabled us to invest for the future in world class facilities to the benefit of all concerned, especially the fare paying passenger.'

Alan Lepatourel, UK Sales Director,
Liebherr Transportation

Big theme: preparation & building confidence

Cutting across all of the discussions was a broader awareness of the need for everyone to be fully prepared in order to take advantage of the opportunities that the HS2 project will present.



To be successful, major infrastructure projects require companies that are ready, able and willing to provide the services required. HSRIL's recent *Poised to Deliver* report indicates that the industry is indeed well prepared. It is well understood that allocating resources, building the right skill base and considering the procurement process at an early stage is vital.

Some suppliers commented that whilst Crossrail is generally viewed in a positive light, they do feel earlier engagement in the project could have produced even greater results. HSRIL members pointed out that people don't seem to realise how close HS2 is to starting work, with work underway in 2017. If companies are planning to bid for contracts, they need to be getting ready right now.

The focus groups highlighted that early preparation is not always easy for SMEs, as often they do not have the same resource

flexibility as larger contractors, and can be less aware than tier one suppliers of the status of projects coming up. For instance, on HS2, there was lingering concern in the supply chain long after it was clear that the project was going ahead. As a result, a number of businesses became unwilling to commit time and resource to the procurement process.

Some SMEs admitted that they sometimes lacked the confidence to establish a working relationship with larger contractors and raised concerns that the culture of larger companies means that people often move around and it is difficult to successfully maintain relationships.

HSRIL response

HSRIL learnt a lot from these observations. It is in the interests of tier one suppliers that SMEs are as ready as possible to bid for contracts as and when they arise.

These observations highlighted the diverse perspectives different companies have in the industry and in particular the important role tier one suppliers have to play in reassuring smaller suppliers about the status and progress of major projects, and alerting them well in advance of significant contract opportunities.

Key Actions

1. HSRIL members will continue with this programme of SME engagement events throughout 2016, in supplement to the events HS2 Ltd themselves organise, to further build confidence and breed understanding in the supply chain about the opportunities that the HS2 project, and indeed others, have to offer
2. HSRIL members will be advocates in the industry for an environment that encourages innovation and collaboration

Big theme: preparation and building confidence (cont)

'As an engineering inspection company the rail industry is vital to our business at Applied, our major customers being the likes of Alstom, Bombardier, Siemens, Interfleet, Virgin, LUR, Knorr-Bremse, Virgin Trains and Wabtec. Our future rests on the commercial success of these companies and their involvement in enormous projects with high-speed rail and specifically HS2.'

Mark Jones, Business Development Manager,
Applied Inspection Ltd

'This was an excellent and thought-provoking event.....from my point of view, with an interest predominantly in rolling stock HS2 seemed a long way off; but hearing the views of the civil engineers has given me a different perspective.'

Chris Fawdry, Managing Director, Lucchini
Unipart Rail Ltd



Conclusions & commitments

Recognition that the design and construction of the HS2 project offers transformative opportunities for business large and small is widespread. In addition to the new transport connectivity offered, the business opportunities are manifold. This report has set out a summary of the opportunities and challenges SMEs perceive in respect of the HS2 project, and how HSRIL members are prepared to respond to them.

HSRIL members have learnt a great deal and indeed some have already started making changes as a result, as set out in the case studies below.

The changes these three members have made are of course just the beginning. In this report we have set out a series of commitments we are prepared to make to address the issues raised. In summary, we intend to:

1. Organise a national conference in Birmingham this summer to discuss the skills challenge and finalise a substantial response to this important issue
2. Play our part in making sure the potential future pipeline of infrastructure projects is understood far-and-wide so that SMEs have the confidence to invest in their people
3. Set an example in skills investment, particularly on HS2 contracts
4. Review our procurement and pre-qualification processes to seek to achieve a higher degree of consistency and commonality between us. This will make it easier for SMEs to bid to multiple HSRIL members
5. Support HS2 Ltd's aim to maximise opportunities for SMEs, and will work with the company to remove barriers to SME participation and seek to facilitate SME involvement
6. Continue with this programme of SME engagement events throughout 2016, in supplement to the events HS2 themselves organise, to further build confidence and breed understanding in the supply chain

Alstom case study

The supplier day held in Alstom's Longsight depot provided a very useful insight into how SMEs and the supply chain are preparing for the challenge of HS2. To build on the good work, Alstom followed the Longsight event by gathering 85 companies in Liverpool to discuss specific opportunities with Alstom linked to investment in UK rail. Opportunities in the North West region include not just HS2, but also the Merseyrail suburban network.

Of those 85 companies, 33 suppliers were new to Alstom and 11 new to the entire rail industry, showing how tier one companies like Alstom are starting to reach out to

spread the benefit of investment in rail across different companies in the UK. Suppliers attending the event included companies like Faiveley, based in Birkenhead, and Lucchini from Trafford Park as well as those from further afield like Penso, based in Coventry.

Businesses in the North West already account for 16 per cent of Alstom's 1,200 UK suppliers. Alstom wants to build on this and the supplier event in Liverpool was the first step to achieving that. With plans moving forward for Alstom's new training academy and manufacturing site in Widnes, opportunities for SMEs in the region with Alstom will only continue to grow.

Laing O'Rourke case study

Laing O'Rourke, having benefitted from participation in the HSRIL Supply Chain events, has already started to take action to help SME's secure the opportunities that will flow from the design and construction of the planned high speed railway. LM, the joint venture between Laing O'Rourke and John Murphy & Sons formed to bid for high speed rail opportunities, firstly set out to identify what was really important to the client and us. Subsequently we then engaged with our potential supply chain by way of a Partner Selection Survey to identify where the supply chain was strong and where support may be needed along the way. The suppliers involved varied in size, but included a large number of SMEs.

Subsequently, on 1st March 2016, we invited representatives from over 150 supplier organisations to our LM Supply Chain Day in Birmingham. The event included a series of five seminars on selected subject areas, and the suppliers were also given the opportunity for Q&A and to network with the LM team and other suppliers. Feedback from the suppliers was a resounding 94% positive, with suppliers appreciating the technical support provided, with free access to many follow up resources on Health and Wellbeing, BIM, Sustainability, Fairness and Inclusion as well as sharing knowledge on NEC contract terms. We are planning further similar supply chain engagements.

Bechtel case study

The HSRIL supply chain events were an extremely useful insight for Bechtel in its ongoing engagement with the UK rail supply chain.

Using experience from High Speed 1 and Crossrail, Bechtel knows that building the right teams and nurturing the right relationships throughout the supply chain will be vital to the successful construction of High Speed 2. The people who provide the labour and the materials to get the job done are naturally critical, so engaging them early, listening to suggestions and being open to opportunities for innovation is central to delivering value for money and getting the delivery schedule right.

As part of the supply chain on the London Underground Congestion Relief Scheme, Bechtel worked with a number of SMEs new

to the rail market, such as Rutland Door Closures and Armstrong Ceilings. Both of these companies have highly skilled, small workforces, but they needed help to grow. Bechtel helped by opening doors to larger businesses in the rail supply chain, answering questions on the often complex procurement processes and advising them on how to keep aware of future opportunities in this sector.

Bechtel would support taking the same approach on High Speed 2, bringing forward ideas from SMEs early in the development phase when it can have the most impact. It will also be important to continue to recognise their contribution throughout the delivery phase in order to build trust and inspire confidence in future growth for their businesses.

High Speed Rail Industry Leaders

Event Attendees

Manchester	Derby	Ashford	Northampton
HSRIL Costain Alstom Bechtel Laing O'Rourke Atkins	HSRIL Bombardier Siemens Hitachi Bechtel Bombardier	HSRIL Hitachi Bechtel Costain Laing O'Rourke	HSRIL Siemens/NTAR Costain Bechtel Laing O'Rourke
Chair Jim Hancock	Chair Jim Hancock	Chair Jim Hancock	Chair Jim Hancock
Invited guests PP O'Connor Jacops TSumnerSmith Lucchini Unipart Rail Ltd Linum Consult Linum Consult Spectrum Group Datum Monitoring Services Ltd Site Desk Construct RIA	Invited guests Aspin Group Plc Crowle Wharf Engineers Flotec Industrial Limited Mechan Limited Railway Vehicle Engineering Ltd Derby & Derbyshire Rail Forum Datum Monitoring Services Ltd PB	Invited guests Lucchini Dellner Operator Training Services Faiveley Transport Saft Batteries Eminox Ltd Ashford District Council CBI Mechan	Invited guests Liebherr Transportation Dellner LUR Browns Fasteners Ltd Stop-Choc Limited Faiveley Transport Applied Inspection Ltd West Code UK Hepworth Clemtech Knorr-Bremse Rail Systems (UK) Ltd Wabtec
Other Field	Other Field Derby Telegraph	Other Field Kent Messenger	Certas Energy UK Limited Zone Green Ltd ISS Facility Services Nomad Rail Business Development Manager, Tecforce Ltd Major Projects & Infrastructure, SNC-Lavalin Inc. Rullion Engineering Other Field



HIGH SPEED RAIL INDUSTRY LEADERS

HSRIL coordinates and shares the expertise and experience within the industry and aims to help ensure that Britain's national high speed rail network is delivered successfully to world class standards, leaving a lasting legacy for growth and jobs and skills.

In bringing together companies in the UK, HSRIL is creating a UK centre of excellence in high speed rail that complements the work of HS2 Ltd. HSRIL is open to all organisations with an operational base in the UK.

HSRIL members represent a wide range of UK-based companies which operate on a multinational basis. These organisations employ thousands of UK-based employees across a broad spectrum of disciplines, and have unprecedented experience in large capital projects both in the UK and overseas. These companies generate significant tax revenues for the exchequer and bring innovation, experience and technical leadership in a competitive environment to the UK rail industry.

We believe that HS2 will serve as springboard for the creation of an export-led UK rail industry. This is strategic Government investment that brings connectivity gains, additional capacity to the national transport network and helps create a lasting legacy of a re-born industrial sector.

We want to take an active part in ensuring this vitally important project for the UK is delivered successfully to the right specification on programme and to budget with strengthened UK-based businesses, right along the supply chain.

Membership levels

Full members

ALSTOM

ATKINS

Balfour Beatty VINCI



BOMBARDIER
the evolution of mobility



ch2m



FLUOR

HITACHI
Inspire the Next



Railway Industry Association

SIEMENS

SKANSKA



Expert Members



SME Members



Media and Membership enquiries

Our members are available for media comment and appearances. Call our press office on 07852 857189, or email hsril@wearefield.co.uk Membership of HSRIL remains open for interested UK-based companies. For further information please email hsril@wearefield.co.uk
