University of Chichester

West Sussex Environment & Climate Change Board

Maintain Mend and Pass-on

Analysis of the Sector and Cluster Potential

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Executive Summary

The University of Chichester and West Sussex Environment and Climate Change Board (WSECCB) have worked together on the Maintain, Mend and Pass-on (MMP) project to analyse the current state of the MMP markets in West Sussex and identify potential opportunities to further develop the sector. In addition to this the University of Chichester has investigated the potential for facilitating the growth of one or more clusters of organisations that work within the MMP sector within West Sussex. If developed, these clusters would be focused on providing a vehicle for promoting the activities to a wider audience and identifying potential synergies for operational efficiency.

Research was carried out by the University of Chichester to identify the existence, location and activities of companies within West Sussex that operate within this sector and a database of companies developed with the aim of promoting the services to the public. This report highlights the data collection process and utilises the database to identify the potential to initiate cluster opportunities and to recommend actions for sustainable development.

The MMP Sector

The secondary research on the initiatives and occurrences of MMP activity across the country found many schemes and ideas that have been adopted by local authorities. Most of these schemes tend to involve a third party – either a charity, not for profit organisation, or commercial enterprise. Examples of these schemes can be found in Windsor & Birkenhead, and Brighton & Hove Councils. Windsor utilises the Recyclebank scheme – an American idea that rewards customers for recycling in the form of vouchers that can be exchanged for products and services from high street stores. Brighton & Hove have used the services of the Defra funded not-for-profit organisation Waste Resources Action Programme (WRAP). Each of the schemes that have been described in the report differs from each other in subtle ways. This emphasises the need to consider the demographics of an area, the geographical situation and the resources available to be utilised.

Once data collection was completed on the West Sussex region it was apparent that although recycling appears to be embedded within consumer behaviour the other activities, such as reuse and repair, are only possible within certain sectors – especially electrical and mechanical sectors.

Although it was not expected that the identification of MMP companies would be easy, the barriers that have been found have been, in many cases, surprising. In some instances there are companies that appear to work 'beneath the radar' and want to remain this way. Some companies carry out a MMP activity as an addition to their main activities and where MMP is a main activity the company tends to be part of a traditional service sector or charity based organisation. The companies that have been identified in the database are mainly traditional MMP industries that have evolved and diversified as the sector has become more 'fashionable', either through necessity or environmental awareness. It appears the refurbish and remanufacture sector is immature and possibly still struggling with the back lash of a 'throwaway society' and the non-commercial viability of repairing or remanufacturing something that costs less to replace new.

Clustering

Research carried out by Robins (2011) has identified four distinct cluster formations:

- Innovation and Technology driven clusters consisting of a few companies working closely on a specific project.
- Branded Cluster Networks that encourage cluster activities through either a niche market or collaborative membership benefits.
- Local Authority or 3rd sector branded clusters that are supported by the public sector and work alongside other public sector organisations to actively encourage sustainability in the particular industry.
- Naturally Occurring Clusters are difficult to identify but probably the most sustainable

Each of the cluster types identified need to have three very distinct, and necessary, characteristics in place for clustering to be successful. These are:

- Trust
- Leadership
- Purpose

For clusters to remain sustainable, regardless of their format, each of these elements must exist in some form or another.

Drivers

From the analysis of the data collected and the review of both national and regional trends it is apparent that there are particular trends and drivers including:

- Economy – the on-going recession has impacted on both business and public ability to spend
- Policy – central governments push to maintain set environmental targets
- Environmental awareness – a general upsurge in the desire to be 'green' by both the general public at all social levels and also businesses through social responsibility

- Fashion – from a design perspective and also as a general trend. Art forms made from recycled goods and the desire to be seen as following the latest fashions – retro, recycled clothes, refurbished furniture etc.
- Capacity – the lack of available landfill is a major driver in reducing waste

These diverse drivers will have differing levels of importance for different companies within the sector as well as the major stakeholder groups. Many of the industries within the sector are very locally focused and the supply chain for many of the companies is also short – often consisting of a supplier (public donating an item) and the company selling the item.

From a local authority perspective the main driver seems to be the lack of future capacity for waste and the need to reduce landfill thereby providing the impetus to facilitate the growth of the MMP sector in order to reduce the amount of waste.

Cluster Potential

From the analysis of the data collected for the project it is apparent that, whereas remanufacture and refurbishment may be fairly immature sectors with limited activities occurring, many of the other businesses are established companies with defined market focus and not new innovative companies reacting to the change in policy direction. As there are no apparent natural cluster formations that have developed over time within the long standing industries the potential for clustering should be carefully considered for sustainability. These findings support the idea that in order to increase the sector size and variation the potential opportunities will be promotion and incentives. Due to the lack of technology and large supply chains this Branded Cluster format is the only cluster format that could, at present, be considered.

A branded cluster would provide a marketable and measurable solution to directing policy and incentives as all cluster members would be part of the brand. The cluster would increase the profile of the sector and enable MMP activities to be carried out by the public in a more informed and sustainable manner. The cluster would need to be branded, marketed and promoted to both businesses and the general public and resources such as a directory, knowledge transfer opportunities, training, resource development and up-skilling may be needed. Opportunities to network and collaborate would increase the attractiveness of the sector to new business development and over time the cluster should develop and become self-sustaining.

Cluster Benefits

For clustering to be successful and sustainable the benefits to each stakeholder should be considered and understood. The following table highlights the main benefits and commitment for the three stakeholder groups within the MMP sector.

The table shows that one commitment from the Local Authority would be funding. Although funding clusters can have a negative effect on a cluster through the reliance on subsidy if the ECCB wanted WSCC to instigate and promote growth within the sector this would have to be considered an option.

Stakeholder benefits

Stakeholder	Benefits	Commitment
Local Authorities	The main benefit for local authorities is through ease of communication A 'known' quantity and location of companies within a sector that can be targeted with incentives, information and support Ability to target and evaluate policy and incentive impacts Cost reduction through improved policy impacts Adherence to central government environmental targets	A start up fund for branding and marketing Time to facilitate, provide leadership, promotional opportunities and monitor and evaluate impacts
Industries	Cost reduction through shared and collaborative activities Networking opportunities Skill and workforce availability Knowledge transfer Marketing opportunities Increased customer base Adherence to policy implications	The main commitment, and probably the hardest to achieve is trust Time to attend networking and training events Imparting knowledge
Public	Increased access to MMP opportunities Increased awareness of policy intentions	Limited commitment except to participate in supporting the MMP industries

Barriers to Clustering

For clusters to be successful it has been shown that all stakeholders need to engage in the concept and practice. One of the barriers to this is the prevalence of large chains and franchise operations. Many of these companies will have internal support available for the branches and will prohibit inclusion into a regional cluster. If collaborative work is allowed, there are very often franchise agreements that will prevent certain activities such as marketing and bulk buying from occurring.

Fear is a barrier as many companies fear they will lose competitive advantage by actively participating in knowledge transfer (KT) and collaboration. It is useful to provide knowledge and information on the purpose of the potential collaboration and engender an understanding of the benefits of knowledge transfer to allay fears of losing valuable customer and market placement. This can be achieved through networking events and workshops but is also embedded through the practice of cluster activities and the development of trust.

Recommendations

There are five recommended actions that WSECCB could take to facilitate the growth in the MMP sector. These can be standalone actions or used as a package of resources. They are:

- Instigating a Recyclebank scheme in West Sussex
- Seeking advice and utilising the services of WRAP
- Developing a branded cluster
- Designing and promoting a portal or web based directory
- An information drive to highlight the benefits of MMP

The database that was designed for this project could be utilised through a website to support businesses and the general public in reducing waste. Information and knowledge transfer is key to a successful and sustainable growth strategy. This could also be used to promote and drive cluster activities. A branded cluster would be a long term strategy that would require planning and commitment from all stakeholders. The branded cluster could, as with Brighton and Hove, be promoted as a network with the plan to instigate cluster activities as the network evolved and generated a larger, more sustainable, membership.

Conclusion

The MMP sector is fairly diverse and in many instances the companies are traditional and long standing. The remanufacture and refurbish aspects of the sector are fairly immature and ultimately the sector is not yet established enough to be seen as a sector in its own right. This may cause problems when trying to define and facilitate cluster objectives and activities.

There is a great deal of potential for the sector to grow and develop as the drivers have been identified as quite diverse and far reaching in terms of local and national impacts. The sector will evolve as trends and fashions change and the economy starts to recover therefore there is sound argument to support the sector now when behaviours and attitudes can be cemented.

1 Introduction

The University of Chichester and West Sussex Environment and Climate Change Board (WSECCB) have worked together on the Maintain, Mend and Pass-on (MMP) project to analyse the current state of the MMP markets in West Sussex and identify potential opportunities to further develop the sector.

Research was carried out by The University of Chichester to identify the existing businesses within West Sussex who currently adopt a MMP approach. A database of companies based in and around the county was developed over three months and utilised a variety of primary and secondary data sources. In addition to this, the University of Chichester investigated the potential for facilitating the growth of one or more clusters of organisations that work within the MMP sector within West Sussex. If developed, these clusters would be focused on providing a vehicle for promoting the activities to a wider audience and identifying potential synergies for operational efficiency.

Clustering has long been seen as an activity based tool for the economic enhancement of a specific geographical location (Novelli et al., 2006, Krugman, 1991, Martin and Sunley, 2003, Porter, 1990), Clustering occurs in order to maximise profits, increase competitive advantage and make best use of natural physical and built environments including labour and skill sets. Theoretically, companies that locate and collaborate on joint working projects and tasks such as shared marketing, logistics or research and development, will benefit from reduced costs, wider participation and therefore improved profitability (Porter, 1998).

The University of Chichester has considerable experience of identifying and developing business clusters through their transnational and regional research projects within the maritime, offshore renewable energy, and digital and high end manufacturing and port sectors (Robins, 2011a, Bern, 2012, Robins, 2011b). The following report identifies the MMP sector and looks at the potential cluster opportunities within West Sussex for the Maintain Mend and Pass-on market and the recommended actions that ECCB could take to ensure the growth and development of this sector.

2 Background

The West Sussex Environment and Climate Change Board (ECCB) have created a strategic action plan as a way of improving the environmental credentials of the county. One aspect of this is to consider and reduce the whole life carbon footprint of many of the goods bought and used by consumers. This can be achieved through; re-use, repair, refurbish, remanufacture and recycling. Whilst it is known that some West Sussex organisations and businesses operate within this agenda e.g. Sovereign in Bognor Regis (remanufacture starter motors), Stonepillow in Chichester (refurbish furniture), there is very little information available on this sector as a whole within the region.

Research was carried out by the University of Chichester to identify the existence, location and activities of companies within West Sussex that operate within this sector and a database of companies developed with the aim of promoting the services to the public. This report highlights the findings of the research and utilises the database to identify the potential to initiate cluster opportunities and to recommend actions for sustainable development.

3 The MMP Sector

The research that was carried out aimed to identify the MMP sector within West Sussex and to consider what other local authorities in the country were participating in regarding increasing the potential for MMP activities. Data collection and secondary research has highlighted a diverse range of MMP industries and schemes apparent in the UK and locally. This section explores the sector and identifies the types of industries apparent and the schemes that are currently active.

3.1 MMP Schemes

There is an array of local schemes within the UK. This section identifies a selection of the most widely used. Many schemes appear to include recycling within the title or as part of the remit. This may well be due to the familiarity of both the term and the concept of recycling by the general public. All the schemes shown here also utilise the practice of reuse and some also repair and refurbish.

3.1.1 Recyclebank

Recyclebank was started in the USA and helps to create a more sustainable future by rewarding people for taking everyday green actions. Through the web based offers and partnerships with local authorities, haulers, small businesses and corporate brands, Recyclebank incentivises green actions with points that can be redeemed for discounts and deals at local and national businesses (Recyclebank 2012).

"Their aim is to motivate individuals and communities to realise a world in which nothing is wasted—changing how people view their role in creating a sustainable future. By educating, engaging and empowering more than 3.7 million members online and offline, Recyclebank aims to increase recycling rates, reduce energy and water consumption, encourage smarter transportation, strengthen local economies and help people realise the financial benefits of making greener choices every day. On average, Recyclebank's members save more than £75 a year through the rewards

programme" (Recyclebank 2012).

In 2009, The Royal Borough of Windsor and Maidenhead launched the Recyclebank scheme as a pilot for the county. Each household was issued with a blue recycling bin and encouraged to recycle items that would earn them points to be redeemed for vouchers towards products and leisure activities. In the first 6 months of the project the total amount of goods recycled in the borough rose by 35%. As with any reward scheme, the more you do the more you get, and Recyclebank vouchers for this project could be collected up to a total value of £130 – equivalent to an average of 10% of the council tax for each household for the year.

In 2010 the scheme became permanent with a five year contract signed in 2012. Since the rewards scheme was rolled out to all of the borough's 61,500 households in November 2010 there have been a wide range of successes including:

- around 82% of residents are recycling more
- more than 60% of households have activated their Recyclebank accounts.

Included in the scheme is green waste and residents can purchase compost made from this waste product. Although this scheme is mainly about recycling household products the effect has been to increase commercial involvement in waste sustainability as the amount of recycling products has increased the scope for business growth within this area has also increased. By increasing the awareness of sustainable waste and involving both the public and local businesses the growth of business activity in the repair and reuse market appears to have been stimulated – although it is too soon to tell how much of an impact the scheme has had on this area.

3.1.2 Brighton and Hove

Brighton and Hove city council have committed to encouraging green attitudes and behaviour. Their website gives a list of websites, charities and businesses in and around the city that can assist with developing MMP behaviour. Rather like a portal the website assists the public on where to access the services which help 'reduce, reuse and recycle'. The directory provides links that redirects to the relevant website which provides additional information. This is a fairly simple way of communicating MMP activities in the local area and relies on the customer having access to the internet. The site does give policy advice and guidance on everyday lifestyle habits such as food, drink and garden waste and actively encourages behaviour change rather than just directions to where to take waste and recycling.

The comprehensive directory provided by the local authority includes local companies that will repair, reuse and refurbish household items as well as commercial waste such as building materials. This scheme is fairly easy to set up and maintain and could be instigated by the WSECCB using the database devised during this research.

3.1.3 WRAP

WRAP (Waste & Resources Action Programme) was established as an independent not-for-profit company limited by guarantee in 2000. They are backed by Government funding from Defra and the European Union. Their vision is a 'World Without Waste' where resources are used sustainably. They work with industry sectors and local governments to improve the way that waste is disposed of. They work to lobby government on waste policy – especially on food packaging – and have produced two websites 'recyclenow.com' and 'lovefoodhatewaste.com which are visited by more than a million people each year (WRAP 2012). The site does not just advocate recycling but also encourages a lifestyle change to include the reuse, repair and refurbishing of many household products. WRAP supports community based projects and helps to encourage business development around sustainable behaviour.

Many Local Authorities have linked these websites to their own website, including Brighton and Hove, and use the services to aid their own drive for a sustainable future. WRAP also provide funds for green initiatives; provides good practice guidance and business support.

3.1.4 Furniture Reuse Network

Established in 1989 The Furniture Re-use Network (FRN) is the national co-ordinating body for 400 furniture and appliance re-use and recycling organisations in the UK that collect a wide range of household items to pass onto people in need. The FRN promotes the re-use of unwanted furniture and household effects for the alleviation of need, hardship, distress and poverty. 2 million items per year are re-used and passed onto low income families. 85,000 tonnes of waste is diverted from landfill and 3000 people are working in the UK to collect and deliver furniture and appliances.

There are presently over 160 organisations within the FRN that refurbish and re-use domestic appliances. In total the FRN repairs and passes on over 250,000 domestic appliances a year to low-income families across the UK that cannot afford to purchase new appliances.

FRN members operate the largest fridge collection service in the UK. Collecting over 300,000 fridges a year. Up to 15% are re-useable and are passed onto low income families.

This national body promotes reuse rather than recycle and actively encourages extending the life of products through refurbishment and repair.

3.2 Traditional Sectors

There are some sectors that are part of the MMP research project focus that are very well established both locally and nationally. These include:

- Books – books have always been swapped, borrowed, resold and reused
- DVDs/Games – the cost of computer games is high and once completed – like books – they tend not to be reused therefore the resale of these items is established, mainly through large chains such as Game, or through internet sites such as Play and Ebay.
- Antiques – very well established global business
- Charity shops – grown in popularity since the late 20th century

These sectors are established but may have been subject to growth due to the recession and increased environmental awareness. To ascertain the impact of these factors on these sectors a longitudinal study would need to be carried out.

3.3 Potential Opportunities for WSECCB Intervention

The aim of the outputs to this project is to instil a sustainable attitude towards consumerism and lifestyle choices that will continue to evolve and become accepted behaviour. In order to achieve this there are certain aspects of the current waste and recycle activities that could be addressed. One of these is the differences in district and borough waste practices.

Waste collection in the different boroughs and districts does not follow a standard process across the county, as it appears to be in many counties. Chichester District operates a weekly collection but alternates between waste and recycling thereby providing a fortnightly service for each. Arun District operates a weekly service for both waste and recycling and the contents of the recycling bins can include glass (unlike Worthing Borogh). Some collection days remain the same throughout the year and others change according to Bank Holidays. Different approaches to achieve the same objective can have the effect of confusing customers and local businesses, especially as they may utilise the facilities of different authorities. In order to make recycling and reuse of products more attractive it would seem sensible to ensure the necessary steps that need to be taken by the consumer are as simple and standardised as possible. This allows a more holistic approach to general waste habits and enables the consumer to learn the necessary behaviour regardless of where they happen to be. As policy is directed down from Central Government to Local County Councils and then further down to the District level there is plenty of scope for interpretation on how best the policies can be adhered to and who is responsible for carrying them out.

If the authorities were to work closer on standardising and collaborating on waste removal and recycling opportunities there could be additional benefits through cost reduction and resource maximisation. Worthing and Adur have achieved this recently with apparent success. The WSECCB is well situated to act as a mediator in encouraging each local authority on the County to work together to standardise waste and recycling and could also encourage WSCC to consider evaluating the practices of all districts and boroughs to identify where best practice appears and where there are opportunities for increasing standardisation and reducing costs whilst maximising recycling practice.

The WSECCB could learn from the experience of Monmouthshire County Council who, since 2005 when they entered into a Service Level Agreement (SLA) with Homemakers Community Recycling (HCR), has successfully diverted 5-6 tonnes of bulky waste from landfill each month. This has been achieved through a collection service of broken and unwanted household items that are then refurbished by the charity and sold on to the general public. The success of this scheme is twofold – it decreases the amount of landfill thereby meeting targets, and it also provides a social service to the local residents by providing necessary household items at affordable prices (WRAP 2012).

HCR is a community based social enterprise that aims to help reduce landfill within the counties of Monmouthshire by collecting unwanted furniture and other household items through its bulky collection and house clearance services. Homemakers hopes to recycle or re-use as much as possible through its work. Homemakers is an educational non for profit organisation, run by staff and volunteers from all walks of life, and is part of both Monmouthshire County Councils' Waste Strategies. Homemakers also operates sales in Abergavenny, Brynmawr, Chepstow and Monmouth. Homemakers aims to help those people in need by offering affordable items such as fridges, freezers, sofas, wardrobes and beds plus many other second hand furniture items. Homemakers sells locally, nationally and internationally to prevent items from entering landfill and creating a sustainable waste collection service and utilises online stores such as Ebay to increase the opportunities for reusing products.

Similar schemes can be found across the country and usually involve a charity or not for profit organisation that carries out all the tasks involved in the schemes. The bonus for the council is in the cost – payment is made to the charities for the amount of waste that is reused. This ensures that the targets are met before payment is made rather than paying out for a service that may not deliver the desired results. This scheme is something that WSECCB could consider in West Sussex where not only landfill is at a premium but also fly tipping has been seen to increase as it becomes increasingly difficult for waste to be disposed of. Many charities will collect household items for free but the WSECCB may consider encouraging alliances between local authorities and charities to promote the reuse of household goods and to provide avenues for goods to be resold – through shops, warehouses, internet sites and County websites, or a dedicated portal.

3.3.1 Summary

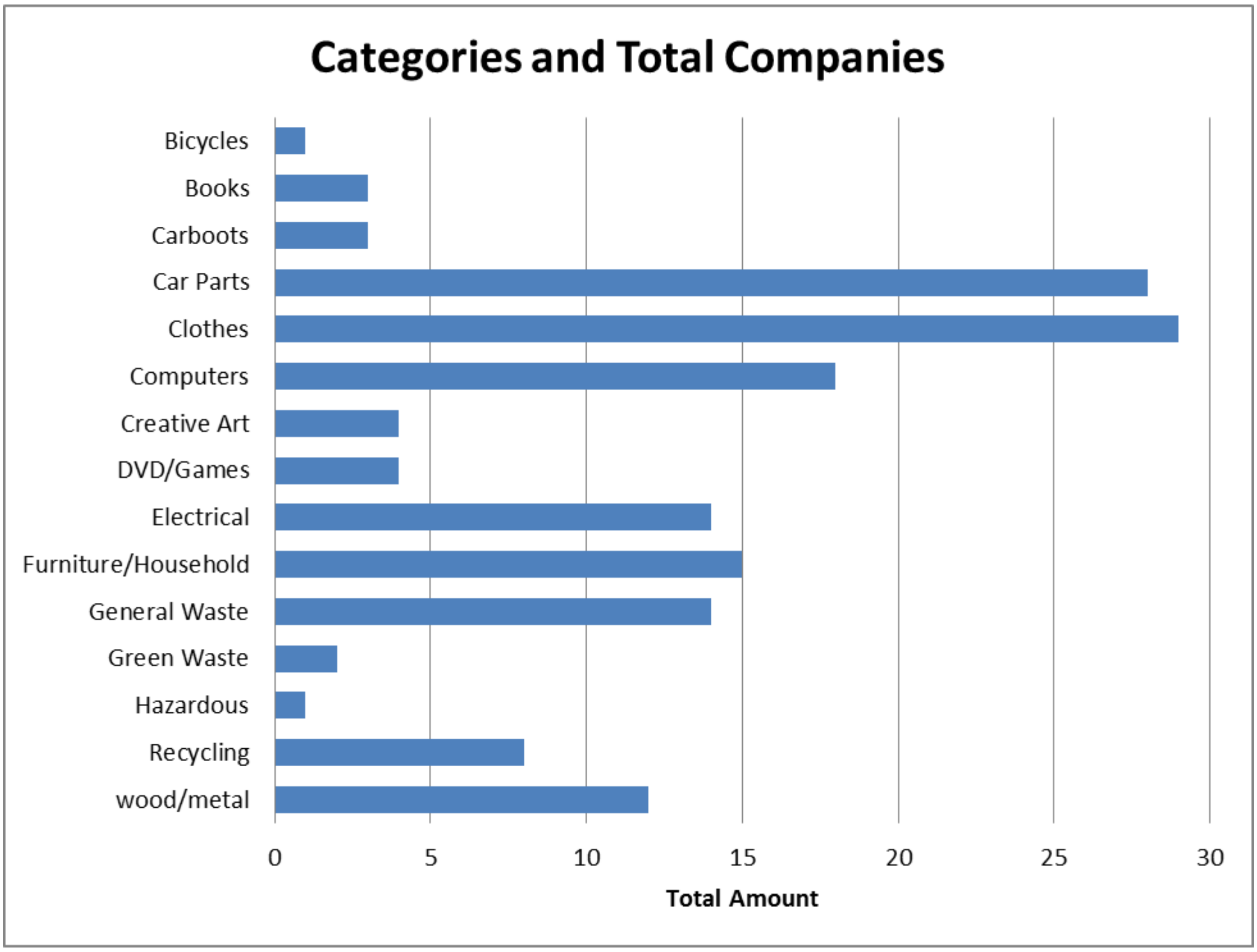
There are many schemes and ideas that have been adopted by local authorities across the country. Most of these schemes tend to involve a third party – either a charity, not for profit organisation, or commercial enterprise. Each of the schemes that have been described differ from each other is subtle ways. This emphasises the need to consider the demographics of an area, the geographical situation and the resources available to be utilised.

3.4 Identifying the Sector

The database population needed careful categorisation to ensure the data collected would be easily searched. This entailed a locational and business activity approach to data collection.

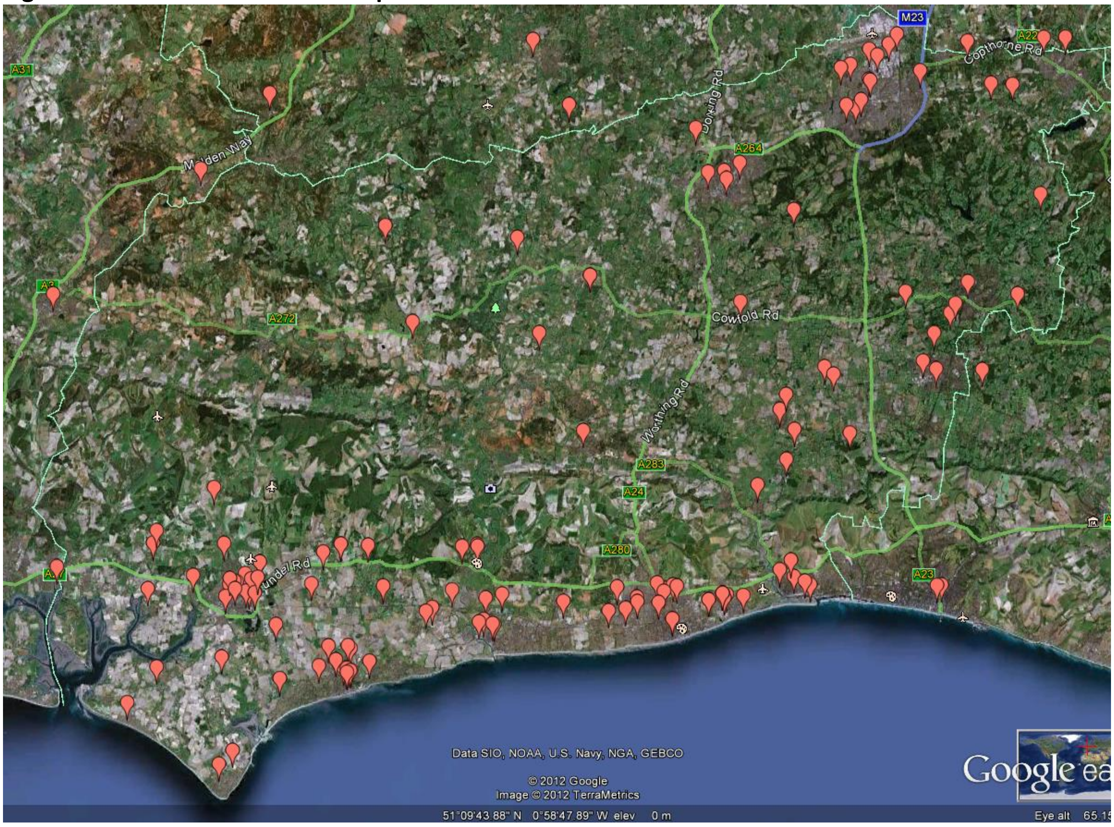
The main categories are highlighted in Figure 1 and show the number of businesses that have been located in West Sussex. Categorising the data was not without problems due to the diverse nature of the industry sector and the individualism of many of the companies. This individualism was mainly found in the micro businesses where often sole traders carried out MMP activities that offered a unique aspect due to their particular talent in refurbishment and recycling – an example of which is the art and design world.

Figure 1 Sectors within MMP and the coverage in West Sussex



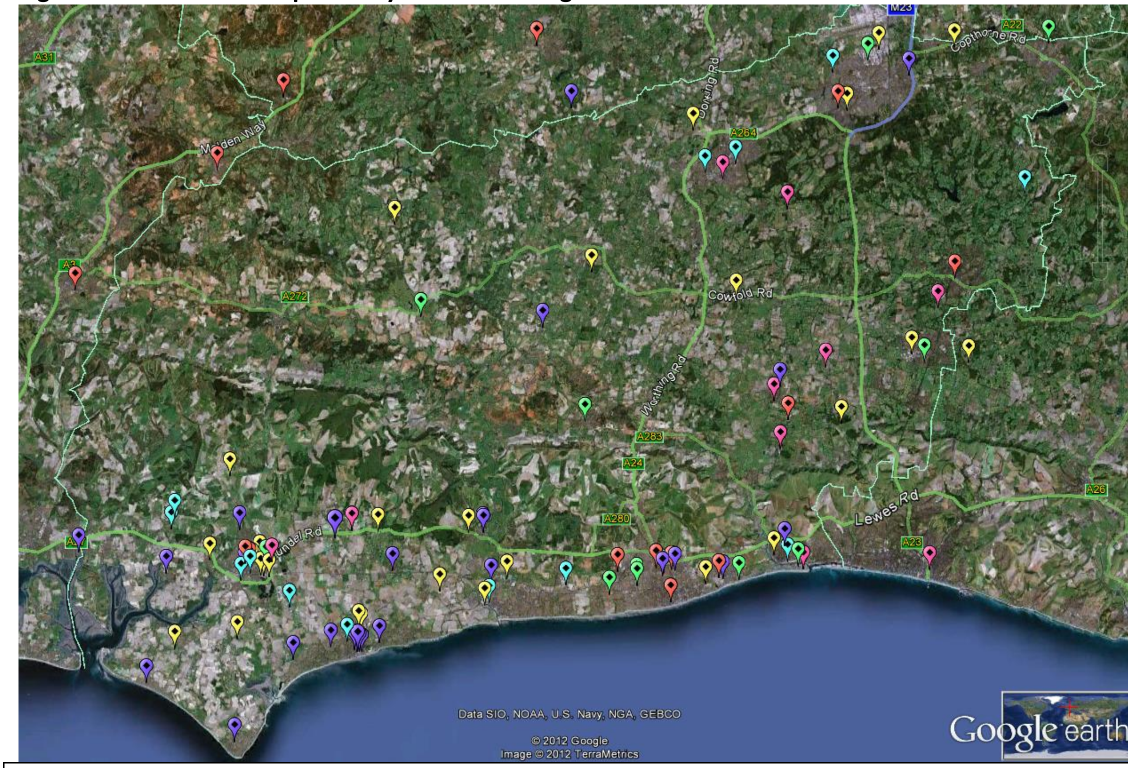
The location of companies is important for identifying coverage across the county and potential opportunities for growth. Figure 2 shows the companies listed in the database as a map. It is clear that there is an even coverage of companies according to the local demographics. The coastal area has a good coverage with density in the main towns of Chichester, Bognor Regis, Littlehampton and Worthing and Shoreham. Mid Sussex has a spread of MMP industries and there is a distinct number of companies in the Crawley district. The north of Chichester District and the Horsham area are not well populated with MMP companies. This will probably be due to the low density of demographics in this area and the lack of sustainable consumer market.

Figure 2 Location of all MMP Companies in West Sussex



Demographics is important to the MMP sector as the majority of the business activity is locally focused i.e. they respond to a small demographic area and provide a service to that area alone, and relies heavily on the customer to provide the goods as well as purchasing them (in the case of reuse and refurbish) or to deliver goods for repair. This reliance on the customer to deliver and collect items reduces the market place for companies as customers will only be willing to travel short distances to repair a product and the cost of travel and time would not exceed the cost of replacement. Those companies that will deliver or collect usually require a significant timeframe for doing so and can put off customers who lead busy lives and are not prepared to wait in for something they consider to be of a low value to be collected. This is apparent from the location of businesses within residential areas and also the spatial separation of companies rather than cluster effect. Location of companies is also important for market sustainability. Figure 3 shows the location of the main sectors within MMP and shows a fairly even spread of sectors across the county.

Figure 3 Location of Companies by the Main Categories



Where Purple = Clothing, Yellow = Car Parts, Turquoise = Furniture, Red = Computers, Green = Electrical, and Pink = Wood & Metals

Wood and Metals tends to be rurally located which is probably due to space requirements and the location of industrial centres. Second-hand clothing is evenly spread but has particular concentrations in those areas with a lower social demographic such as Bognor Regis. Computer repairs and refurbish, on the other hand, appears to be located in the higher demographic areas of Chichester, Worthing, Mid Sussex and the Hants and Surrey border.

It is not possible to say whether all companies have been located or, if not, what percentage still needs to be found. The micro nature of many of the industries and the apparent tendency for companies to work under the radar, especially in rural communities, prevents a comprehensive account of the state of the MMP sector to be made. It is possible to give a clearer understanding of the categories and to help engender an understanding of the uniqueness of each individual sector. Table 1 highlights these sectors and explains the market in greater depth.

Table 1 Analysis of the Main Sectors

Clothing	This sector contains mainly charity shops and second-hand designer shops. This sector is long standing and established and will evolve as the economy changes with more shops apparent in a recession and less in the boom times. The second-hand designer shops tend to be located in affluent areas to attract the goods from source as well as locate their consumer base.
Furniture	This sector has grown and developed as internet based companies such as Ebay allow for easier access to markets. Second-hand furniture tends to be sold by charity based companies for the homeless and elderly where furniture is collected and both sold and given away to those in need. House clearance shops are in less demand now as the chari ties have grown and Ebay has helped to take away some of the market. Antique stores are not considered part of the MMP sector
Computers	Although a growing sector due to the cost of a new PC and the almost continual refurbishment options there is a limit to this sectors growth. Technology advancements can mean that products become obsolete quickly and even refurbishment becomes inefficient with cost. Refurbishment tends to be the domain for the beginners market rather than professional or commercial whereas repair can accommodate all markets.
Green Waste	Developing sector that looks at composting and recycling. This sector may grow as the market for renewable energy increases and biomass and other green waste can be adapted to provide sustainable energy sources
Wood & Metals	An established but developing industry. Scrap metal is a traditional sector but how the metals are used has changed and is still evolving. Art work using scrap; metal recycling, the trend for retro items and reinstating homes to original style. There is also a scarcity of some metals which makes the salvage of such items very profitable.

For the purposes of this research certain companies and business sectors were omitted from the database. The reason for this is explained in Table 2.

Table 2 Companies Omitted from the Database

Company/Sector	Reason for omitting
Internet based firms	These are usually national and international in focus and will have little to do with any MMP scheme that WSECCB decide to initiate. There are two companies that were included – World of Books, this was due to their location within West Sussex, and Return to Earn, this was due to the promotional aspects of this service.
Limited Activity Sectors	Where the activity was only a small portion of the overall business – i.e. lawnmower repair, the company needed to specialise in second-hand sales and repair and refurbish rather than just sell spare parts.
Large chains	Blockbuster, Halfords, Homebase – all of these provide an MMP service but it is not a main activity and would be unlikely to participate in an MMP initiative
Antique Shops	This is a traditional sector that is not considered as an MMP sector
Charity Shops	There are an abundance of these across West Sussex but although they are part of the MMP philosophy they are numerous and have limited contact details. It was decided early on in the project to omit them from the database. This may change in the future as the sector adapts and diversifies and should be monitored. An exception to this is the St Wilfreds hospice which has been included due to the furniture sales and local focus

During the data collection each company was approached to ensure they were willing to be included in the database. This was time consuming and had varying success. There are still companies within the database that have yet to agree and also companies that asked to remain out of the database. The reason these companies are included at this stage is for the purpose of analysis only. All companies are marked as having been contacted, have agreed, or have refused. It is important that these companies are removed from the database should any promotional activity take place that would utilise the database.

In order to collect as much information on the MMP sector as possible there were various press releases, social media advertisements and support requests to Sussex Enterprise, Chambers of Commerce and Parish Councils. These initiatives were moderately successful and the press releases that were published are found in the appendix.

Many companies were found 'by accident' rather than searching specifically. This highlights the diverse nature of the sector and the difficulty that the public and commercial enterprises must have in trying to locate a business that would help them to repair or reuse and item rather than just recycle. There may also be an element of the 'cowboy' who may offer a service that ends up costing a fortune which, in turn, prevents the consumer from trying that activity again.

This highlights the importance of information and knowledge transfer about the activities that can be carried out, what it may entail, and how much it would cost. If someone charges £50 to come and tell you that your fridge cannot be repaired you are unlikely to attempt repair the next time something similar occurs and are more likely to go and buy a new one first! This is especially true now companies are required to take away the old appliance rather than you having the bother of disposing of it yourself.

Although it was not expected that the identification of MMP companies would be easy, the barriers that have been found have been in many cases surprising. In some instances there are companies that appear to work 'beneath the radar' and want to remain this way. Some companies carry out a MMP activity as an addition to their main activities and where MMP is a main activity the company tends to be part of a traditional service sector or charity based organisation. The companies that have been identified in the database are mainly traditional MMP industries that have evolved and diversified as the sector has become more 'fashionable', either through necessity or environmental awareness. It appears the refurbish and remanufacture sector is immature and possibly still struggling with the back lash of a 'throwaway society' and the non-commercial viability of repairing or remanufacturing something that costs less to replace new.

The database is attached to this report as Appendix. The data has been organised by Category in alphabetical order.

3.5 Summary

The sector is a diverse and constantly changing social and economic arena. Many of the companies are micro businesses and many larger organisations carry out MMP activities as part of an after sales service or, where repair is concerned, to comply with British Standards on electrical items and vehicles. The rise in internet based companies that are dedicated to MMP activities has possibly provided a momentum to the consumer to also search for local companies. Second-hand furniture, that is not antique, has been made 'acceptable' to own through Ebay and those people who would have previously avoided the perceived stigma of charity shops and second-hand shops are now able to both reuse and recycle household items discreetly, or, as part of the green movement.

How this sector can now be encouraged to grow and develop is part of the next section. Clustering will be explored as an option before the recommendations that can be drawn from the report are given.

4 Clustering

Clusters are geographic concentrations of interconnected companies and institutions in a particular field. Clusters encompass an array of linked industries and other entities important to competition (Porter 1998). Clusters extend vertically to customers and horizontally to manufacturers of complementary products and to companies in industries related by skills, technologies, or common inputs (Reid et al., 2007). Clusters can form diagonally to include governmental and other institutions - such as universities, think tanks, vocational training providers, and trade associations - that provide specialised training, education, information, research, and technical support (Porter 1998). Geographically concentrated networks and value chains of suppliers and/or knowledge institutes collaborate with the aim of developing innovations (Hospers and Beugelsdijk, 2002)

Clustering allows firms to have better access to resources such as technology, information, inputs, customers, and channels, than they would normally have if they operated in isolation. Clustering can save a company valuable time and money through collaboration on knowledge and sharing of resources (Smith and Brown, 2009). Clustering can also improve efficiency and benefit the end user through high quality products at lower cost due to reduced development and production costs(De Langen, 2002). Clustering provides an environment that encourages new business formation, lowers the barriers to entry, and spreads the risk of start-up (Porter 1998). Better knowledge transfer results in increased innovation and speeds up economic growth (Isaksen, 2009). Clustering is not automatic though, the success of a cluster cannot be explained by agglomeration economies alone, there has to be clustering activities taking place such as collective efficiency which in turn is highly dependent on the input of social capital (Porter 1998; Reid, Carroll et al. 2007).

Research carried out by Robins (2011) has identified four distinct cluster formations:

1. **Innovation and Technology** driven clusters consisting of a few companies

working closely on a specific project.

a. Single project based cluster that works to a known timescale and financial commitment.
b. Research and development centre based clusters where, similar to the single project cluster, activities centre on projects and are time specific, but sustainability is achieved through crossover of knowledge and the birth of new projects and innovative ideas.

2. **Branded Cluster Networks** that encourage cluster activities through either a niche market or collaborative membership benefits.
3. **Local Authority** or 3rd sector branded clusters that are supported by the public sector and work alongside other public sector organisations to actively encourage sustainability in the particular industry.
4. **Naturally Occurring Clusters** are difficult to identify but probably the most sustainable

Each of the cluster types identified need to have three very distinct, and necessary, characteristics in place for clustering to be successful. These are:

1. **Trust**
2. **Leadership**
3. **Purpose**

For clusters to remain sustainable, regardless of their format, each of these elements must exist in some form or another. The purpose can change – new direction, innovation, challenge or threat – and leadership can change as the market conditions or direction changes, but if trust disappears then the cluster will doubtless fail to survive. It is the trust that appears to be the hardest to achieve, sustain and build on. Developing trust takes a long time, sometimes years and the strength of the cluster relies on the level of trust that is maintained (Robins 2011b).

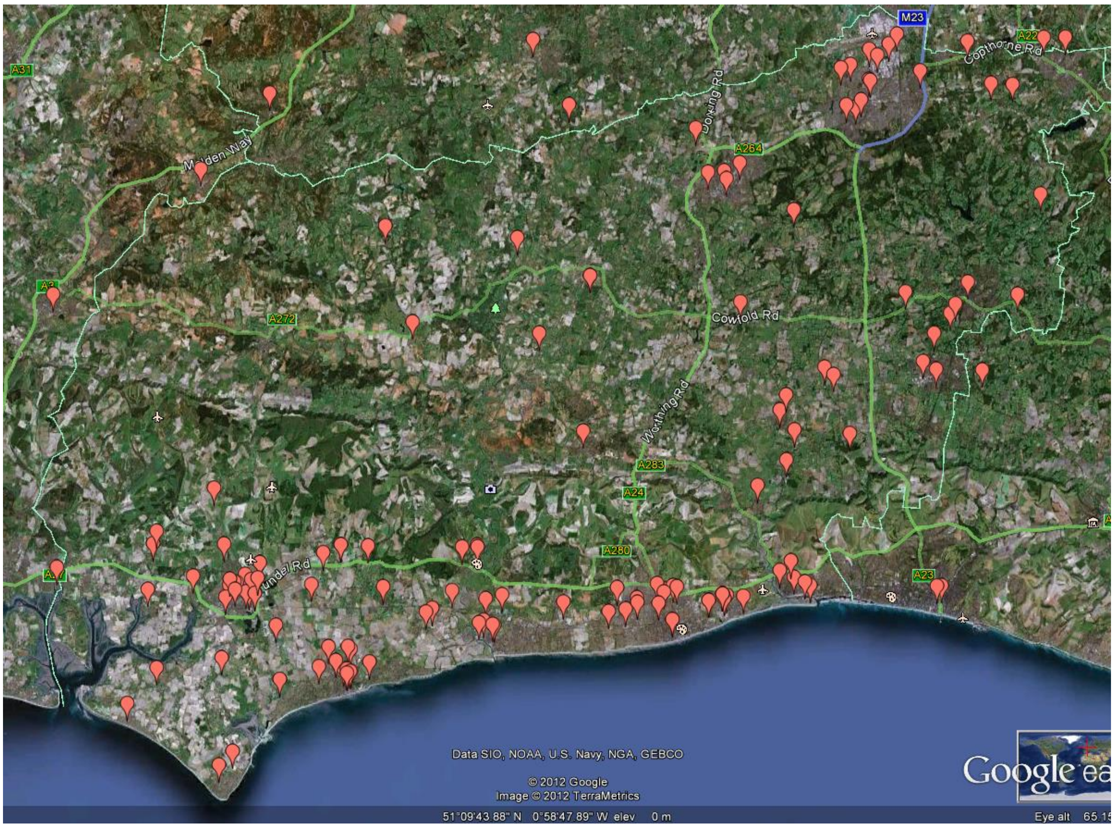
Leadership can come in the form of an organisation or a single person – a personality that can bring together likeminded companies for networking and knowledge sharing – or an innovation or policy change that other companies want to be part of. Knowledge transfer has recognised benefits and therefore the individual company's gains outweigh any loss of competitive advantage.

Recent changes to regional policy and the demise of the regional development agencies has seen renewed interest in more local cluster formations that are contained within either county or Local Enterprise Partnership zones. These local clusters tend to be sector led and fall within the Branded and Local Authority led cluster formations. Encouraging clustering and providing a platform for cluster activities to take place has been found to be a prominent activity in itself. The success of these activities can sometimes be seen to be despite the industry organisation rather than because of it (Robins 2011). For clustering to become successful and sustainable there are specific factors that need to be understood, and agreed, first – Leadership of the sector, clear communication strategies, recognition of the economic impacts and the development of sustainable support networks.

5 Analysis of Cluster Potential in the Maintain Mend and Pass-on Sector in West Sussex

The maintain mend and pass-on database has been segregated into distinct activity sectors including: furniture, clothing, electrical, car parts, computers and general waste. Figure 4 highlights the location of all companies identified in the region.

Figure 4 Maintain Mend and Pass-on Sector in West Sussex

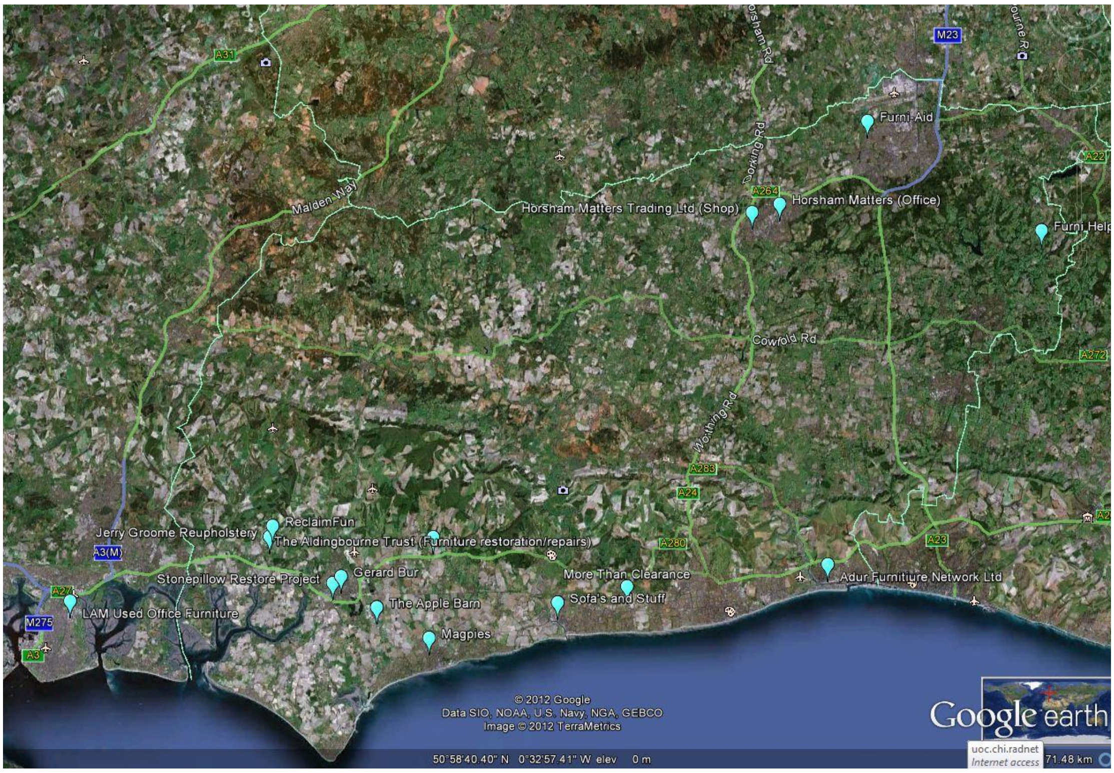


First impressions should consider that the sector is fairly evenly spread throughout the county with the main density of industry located in populated areas such as Chichester, Worthing, Crawley and Bognor Regis. This highlights that from a cluster perspective there does not appear to be a locational factor to consider developing. When compared to the population density of the towns it appears that Bognor Regis has the highest amount of businesses per head of population. This may be due to the demographics of Bognor and the impacts of the economic climate – cheaper business rents necessary for a low impact business and a high proportion of

B, C&D social demographics that may be adversely affected by the recession providing a ready market.

Once the data is disaggregated to activity level the locational spread remains the same throughout the sector (figure 2 shows an example of the furniture sector)

Figure 5 Furniture Sector in West Sussex



Natural cluster formation on a horizontal basis is not apparent in West Sussex in the MMP sector. Consumer demand is addressed but competitive advantage is maintained rather than the formation of locational clusters. The location of companies suggests that little collaboration between the sectors is carried out and vertical cluster opportunities are limited due to the lack of supply chain in the majority of cases i.e. second-hand furniture will come from supplier (general public) and be sold to the customer (general public). The supply chain for other areas may involve a greater amount of input from different organisations – especially in the remanufacture or refurbish sectors – but these are still in their infancy and are not yet established enough to warrant consideration for cluster facilitation.

5.1 Cluster Trends and Drivers

From the analysis of the data collected and the review of both national and regional trends it is apparent that there are particular trends and drivers that do not always work equally for each stakeholder. The sector is driven by some very different drivers including:

- Economy – the on-going recession has impacted on both business and public ability to spend
- Policy – central governments push to maintain set environmental targets
- Environmental awareness – a general upsurge in the desire to be 'green' by both the general public at all social levels and also businesses through social responsibility
- Fashion – from a design perspective and also as a general trend. Art forms made from recycled goods and the desire to be seen as following the latest fashions – retro, recycled clothes, refurbished furniture etc.
- Capacity – the lack of available landfill is a major driver in reducing waste

The current economic climate in the UK has seen an increase in a desire by the general public to sell goods and repair broken items from a cost and necessity perspective. This has allowed the commercial sector to develop profit making ideas from second-hand goods that include repair, refurbish and also direct resale. National internet based companies are increasing in proliferation and these are becoming well known through social network sites. These include opportunities to recycle not-for-profit (Freecycle), recycle for profit to the original owner (Ebay), and recycle through a 'middle-man' (Return to Earn for clothing and Envirofone for mobile phones). These different takes on what is essentially the same activity highlight the different consumer needs that are being addressed. Those who need the income from the sale and have time and internet access are more likely to sell items themselves. Those with little time and a strong environmental outlook may choose to give items away, and those who lack the time but want the income may choose the 'middle man' option. Although this trend in behaviour may be a positive move towards encouraging MMP activities it does not provide a suitable avenue for cluster activities due to the location and sporadic nature of the activities.

Policy, set by central government, has increased the need for local authorities to address the carbon footprint impacts of their regions which has also impacted on local commercial enterprises having to adapt their working practice to adhere to policy implications. Policy can be a positive driver for cluster activities as companies have a common goal to aim for and can work together to ensure legislation is adhered to. For policy to be effective it must address an identified need that is accepted by all stakeholders. If a stakeholder believes the policy is undermining and irrelevant the take up and acceptance will be minimal. Policy drivers must also be supported by support and information as well as incentives or rewards for compliance to ensure success. Clusters can offer an opportunity for policy to be directed and targeted towards a specific industrial sector. The policy will be clear and accepted if in line with the needs of the sector and the infrastructure for support and knowledge transfer is provided by the cluster partners.

Environmental awareness has always tended to be the preserve of the general public – unless it provides an income revenue, increased customer base or tax incentive for companies – but in this age of corporate responsibility, for many companies working within the MMP sector there will be a desire for compliance to environmental practice due to the nature of the sector. Environmental awareness also appears to be linked to social demographics and income for the general public and the boundaries between awareness, necessity and fashion can blur.

Fashion is a trend within the environmental sector with new forms of art, clothing and household goods being made from recycled goods at varying cost to the consumer. 'Retro' is also a fashion that, although has been around for many years, sees impetus from the current economic and environmental awareness climate. This is not an area that would be recommended for cluster activities as the sustainability of fashion is weak in the sense it changes frequently and unless the consumer remains loyal, or the manufacturer adapts, the sector will continue to be volatile.

Capacity is a specific problem in the West Sussex region and the lack of future landfill sites proving to be a significant issue requiring alternative solutions to be found. The research on the MMP market has shown that the main driver used by local authorities to reduce the amount of landfill has been strict legislation on what and where dumping can take place, and by whom, coupled with encouragement to recycle through the provision of recycling sites and domestic recycling bins. There has been limited success due to the increase in fly tipping across the region, and also nationally. The current economic climate has also seen many councils increase the cost of waste disposal as a way of saving money.

5.2 Cluster Sector Potential

From the analysis of the data collected for the project it is apparent that, whereas remanufacture and refurbishment may be fairly immature sectors with limited activities occurring, many of the other businesses are established companies with defined market focus and not new innovative companies reacting to the change in policy direction. As there are no apparent natural cluster formations that have developed over time within the long standing industries the potential for clustering should be carefully considered for sustainability. That said, this suggests that there is potential to increase the sector size and variation through promotion and incentives. The sectors that are established lie in the second-hand clothing and furniture markets, car part refurbishment, printer ink and computer supplies, books, and DVD/Gaming entertainment. There appears to be a rise in large MMP firms and also online companies. Green waste and waste recycling are also increasing in size, amount and specificity. The rise in amount of companies and the diversity of the sector underpins the potential for overall strengthening of the sector and opportunities for further development.

Innovation and technical advancement are not common to the MMP sector in-puts or out-puts, although innovation may play a part in the ability for the sector to grow through the ability to separate waste and recycle parts. The supply chain for the MMP sector is also rather short as manufacturing does not feature significantly in this sector apart from the remanufacture sector which is relatively small in comparison to the other four sectors.

Branded clusters are not apparent within the region although there is evidence from previous research that this particular cluster formation could be explored for development by the local authority. This will be discussed in the next section

6 Cluster Recommendations

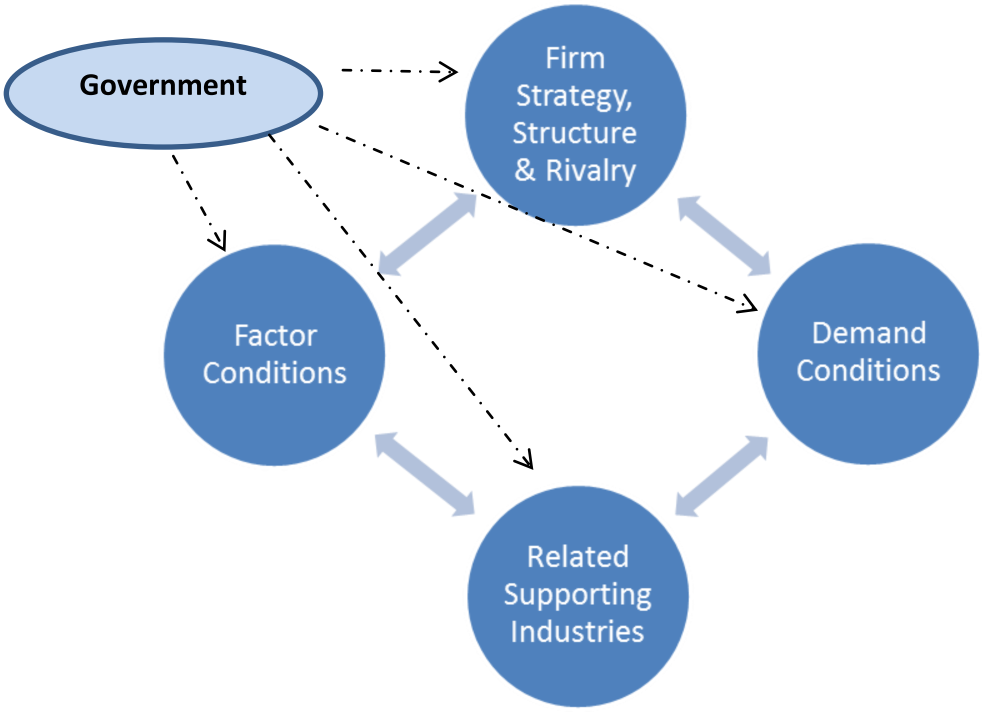
The occurrence of, and potential for, clustering has been explored and the opportunities around the four types of cluster formation explained. There is little opportunity to facilitate clustering from a technical aspect and there are no apparent natural cluster formations. The local authority/3rd sector cluster type is specific to large environmental and policy impacts that affect the use of the natural resources by both business and the general public. Although there is an element of this within the MMP sector the focus tends to be on directing policy and adapting to change rather than developing from a commercial perspective. This type of cluster is, therefore, of limited use as it works well with large industry and multiple policy input whereas the MMP sector can be seen as just one aspect of a larger overall environmental objective. The branded cluster/network does appear to have potential for facilitation and could have a variety of benefits for the local authorities, industries, and general public.

Before the recommendations for cluster activities are made it is important to first understand the benefits of clustering from a general perspective as well as the perspective of the MMP sector.

6.4 Cluster Benefits

Facilitating clustering can take time and resources and be met with suspicion and apathy from industries. It is important that the benefits of clustering are understood by all stakeholders and an awareness of the necessary contributions is understood before any facilitation is planned. Porters ‘Diamond Cluster’ (figure 3) highlights the conditions and stakeholders that are necessary for clusters to be effective.

Figure 6 Benefits of Clustering



Source: Porter 1998

For this type of cluster to be effective there is usually a policy or identified purpose for the cluster to become viable. The policy ensures the support necessary to fulfil the other four requirements are in place.

- Factor conditions are related to workforce development and ensuring the necessary skills and labour are available. The policy gives the impetus to educational establishments to offer training and to the workforce to seek skills that will enable employment in a growing sector
- Demand conditions relate to the consumer. The policy will give the impetus to the consumer to change their habits and adhere to a 'greener' method of disposing of their goods. This increases the demand for the services provided by the sector
- The Firm Strategy sees the commercial desire towards competitive advantage and increased innovation and entrepreneurship within the sector.
- Related industries are the supporting sectors that develop as the core sector grows and develops.

This top down approach to cluster development is only successful if the policy is desirable in intent, applicable to all stakeholders, and has the longevity to sustain the developing cluster formation. If the policy direction changes the cluster will fail, unless a separate purpose or full adoption by stakeholders remains, in which case the cluster will evolve to support itself. WSECCB have sound reasons for wishing to develop the sector and the research has shown that the sector is developing within the region. Identifying and promoting the benefits of facilitating the cluster would be necessary to ensure the growth becomes sustainable.

Clustering occurs in order to maximise profits, increase competitive advantage and make best use of natural physical and built environments including labour and skill sets. This can also include a generic branding across a region – Sussex Foods for example will engender a sense of organic and healthy farming that has nothing to do with the product or companies but increases the profile. Companies may not carry out activities, network or develop any relationship other than benefiting from the generic but potent association with being part of a local or regional cluster brand. Successful clusters will affect competition in three broad ways:

1. by increasing the productivity of constituent firms or industries;
2. by increasing their capacity for innovation and thus the growth of productivity; and
3. by stimulating new business formation that supports innovation and expands the cluster.

Many cluster advantages rest on external economies across firms and industries of various sorts. A cluster is thus a system of interconnected firms and institutions whose entirety is more than the sum of its parts (Jensen et al., 2009).

The main benefits to the different stakeholders for the MMP sector are outlined in table 3. The table identifies that funding may be a commitment from the local authority. Funding clusters is not to be considered a sustainable practice. It is better to incentivise clusters through policy and tax incentives rather than 'start-up' funds as cluster rely on the funds and tend to fail once funding is withdrawn. For branded clusters initial funding may be necessary to cover marketing costs and branding of the cluster but should not be seen as administrative costs for sustaining the cluster.

Table 3 Benefits and Commitments for each Stakeholder

Stakeholder	**Benefits**	**Commitment**
Local Authorities	The main benefit for local authorities is through ease of communication A 'known' quantity and location of companies within a sector that can be targeted with incentives, information and support Ability to target and evaluate policy and incentive impacts Cost reduction through improved policy impacts Adherence to central government environmental targets	A start up fund for branding and marketing Time to facilitate, provide leadership, promotional opportunities and monitor and evaluate impacts
Industries	Cost reduction through shared and collaborative activities Networking opportunities Skill and workforce availability Knowledge transfer Marketing opportunities Increased customer base Adherence to policy implications	The main commitment, and probably the hardest to achieve is trust Time to attend networking and training events Imparting knowledge
Public	Increased access to MMP opportunities Increased awareness of policy intentions	Limited commitment except to participate in supporting the MMP industries

The report on the MMP status has shown that there are other counties and local authorities that have utilised this branded network approach with differing success. Brighton and Hove is probably one of the most prolific and closest joint collaborative projects in the SE and provides a branded marketing opportunity for local renewable and recycle industries. This example is not carrying out cluster activities and does not make full use of the benefits that clustering can offer, but awareness of the brand and opportunities would increase the take up by the public.

6.5 Barriers to Cluster Opportunities

For clusters to be successful it has been shown that all stakeholders need to engage in the concept and practice. One of the barriers to this is the prevalence of large chains and franchise operations. Many of these companies will have internal support available for the branches and will prohibit inclusion into a regional cluster. If collaborative work is allowed, there are very often franchise agreements that will prevent certain activities such as marketing and bulk buying from occurring.

Fear is a barrier to a successful cluster. Many companies fear they will lose competitive advantage by actively participating in knowledge transfer (KT) and collaboration. It is useful to provide knowledge and information on the purpose of the potential collaboration and engender an understanding of the benefits of knowledge transfer to allay fears of losing valuable customer and market placement. This can be achieved through networking events and workshops but is also embedded through the practice of cluster activities and the development of trust.

There is a list of attributes that support more effective KT called 'The A list' (Ellis and Robins, 2011). The list that would serve to stifle its development is 'The B list'.

The adapted 'A' List applicable to the MMP sector- Factors that positively support KT

- Recognition that personal and organisational knowledge development is a source of competitive advantage-without this there is no energy for the changes required

- Reference to knowledge sharing and the need for collective working in strategic planning

- Technology systems based around supporting ever expanding connectivity-this means the technology systems have to allow for human interaction (e.g. 'chat rooms', or virtual communities of practice) and not just be about efficient data transfer. It is important that any portal development allows for this human interaction to occur.

- Recognition that flexibility is more desirable than conformity-knowledge transfer works better where people have tacit permission to change as a result of new knowledge. This is easier for small companies and can provide a multitude of growth opportunities.

- High levels of trust exist between co-workers, managers and customers-so that any knowledge shared will be used wisely and constructively. Trust is imperative for any cluster to function.

The 'B' List- Factors that hinder KT (in addition to the opposites of the previous list)

- Excessive short-term results focus-will prevent any investment required for longer term gain. Short term quick wins may induce cluster growth and develop trust initially but for sustainability there needs to be investment into the cluster by stakeholders to ensure commitment for the longer term.

- Technology systems based solely around controlling and measuring-will not allow for feedback or monitoring loops to share what has been learned. Local authorities need to be aware that although it is in their interests to monitor and measure success there needs to be a balance of information transfer

- High levels of confusion over what knowledge transfer is all about-until clarity is achieved about terminology and the benefits effort will be dissipated. It is vital that all stakeholders are aware and understand the benefits of KT for the cluster to survive.

- Cultural hold ups to knowledge gathering, sharing and development-e.g. fear of what would happen to me or others if I shared my knowledge. This is a fundamental barrier to sustainable cluster initiatives and one that must be overcome.

- Structural barriers to knowledge sharing-such as silo structures, incompatible technology, language and communications restrictions. This can also be affected by the confusion over data protection, IP, and other legal, policy and regulatory procedures.

There are many barriers – both real and perceived – to successful and sustainable cluster facilitation but the benefits of clustering far outweigh and of these impacts. For clustering to be successful there needs to be a naturally occurring lean towards cluster activities that lends itself to support. It is very difficult, and arguably impossible, to force a cluster out of a selection of companies successfully. To this end, the following section takes a look at the possible actions that WSECCB could take that would have a chance of developing cluster activities and does not suggest any actions that would prove unsustainable in the long term.

7 Actions for Success

The MMP sector findings and clustering potential have allowed for a diverse yet complimentary selection of positive recommendations that WSECCB could choose as actions to aid the development of successful MMP behaviour. This section will look at the more general recommendations before considering the opportunities to develop a cluster.

7.4 Developing the MMP Sector

Actions for success in the MMP sector range from a low key/low cost approach to a committed and budgeted strategic approach. The diverse nature of the sector and the willingness and ability of the main stakeholders will be paramount in ensuring success. The following suggestions can be taken as individual options but the complimentary nature of the recommendations also allow for a 'menu' approach whereby different actions can be taken in harmony.

7.4.1 Recyclebank UK

The success of the Recyclebank scheme both in the USA and the UK provides a key vehicle for local authorities to utilise. It is suggested that WSECCB work alongside the district and borough councils to promote the scheme to both businesses and individual households. This can be achieved by embracing either one of the following extremes or settling for something in between them.

7.4.1.1 Complete Commitment

WSECCB could decide to embrace the scheme as a countywide initiative. This would involve working with district and borough councils to promote the initiative to all households (or running a pilot scheme in one district) and ensuring that the resources are available for each household and business are available to ensure access. Resources would include recycling bins for each house and access to reward redemption for those without internet access. As each local authority has differing needs and resources available to them the Recyclebank would need to advise on how the scheme could be best adapted to suit the local demographics. The benefits of carrying out this activity are proven – a 35% increase in recycling during the 6 month pilot in Windsor and Maidenhead – and will also have the added bonus of promoting local business through the rewards.

Consumers are likely to take up the scheme as there are rewards that are tangible and applicable to all consumers. There may be the opportunity to have local companies who will provide points for reward redemption and this will have the added benefit of increasing local trade. In many respects the scheme has similar benefits to most reward card schemes currently run by large supermarkets and corporate schemes. The difference with this scheme is consumers are not being encouraged to purchase more but to rethink what they purchase, how, and what they do with it when they have finished with it. It is difficult to find barriers to the Recyclebank scheme but it should be noted that the success is dependent on the local authority support, the continuation of companies providing the rewards and the ability for recycling to be maintained once the goods have left the consumers recycling bin.

7.4.1.2 Recyclebank promotion

At the very least WSECCB could promote the Recyclebank scheme to individuals through the a website and newsletter. The scheme will encourage recycling and reusing to the public and should increase the amount of recycling that takes place in the county. This would have the advantage of helping to reduce the amount of landfill – depending on voluntary take up of the scheme – and also increase awareness of the MMP sector businesses available within the county to increase the reuse, repair and refurbish activities as the behaviour of individuals' changes towards a more sustainable lifestyle. This recommendation would be of minimal cost and resource to the council but would have a greater impact if linked to another activity such as the MMP Portal highlighted next.

7.4.2 Working with WRAP

WRAP provide comprehensive advice, support and training for local authorities in the UK. One of the benefits of WRAP is that councils can use as much or as little of the services that they need to, or feel able to. They can apply for strategic and operational support on recycling and waste collection issues if considering making changes to the services offered to households and business customers. WRAP also offer support to new partnerships or help existing partnerships to develop further to increase the collection of bulky items and textiles for reuse including:

- Partnership brokering, such as identifying and engaging with key groups through a reuse forum
- Service reviews and advice on collecting for reuse
- Communicating reuse options to householders, and
- in collaboration with WRAP's Third Sector Programme support, to build capacity within third sector partners covering marketing and business plans and interim management (WRAP 2012).

WRAP has also developed toolkits and collated good practice on a range of waste prevention initiatives. There is also the possibility of 1:1 advice to authorities on waste prevention including:

- Responding to telephone enquiries or email requests for information
- Signposting to toolkits, case studies and other useful information
- Running workshops to help determine local priorities for waste prevention
- Peer reviewing your plans and strategies
- Training course on implementation of waste prevention plans and related communications

It is recommended that WSECCB consider all the services that are available to them through WRAP and use them to compliment the other recommendations that are given here.

7.4.3 MMP Portal

It may be the intent of WSECCB to provide portal facilities for the MMP sector to use. This would have various benefits for the sector without facilitation of specific cluster activities. The database that has been developed as part of this project could be used to underpin a portal similar to that provided by Brighton and Hove Council. The portal would provide a 'one stop shop' for all business and public MMP needs by highlighting the different sectors and businesses available within the local area. The portal could be linked to Google Maps to provide locational data as well as activity and contact details.

The portal could be housed within the WSCC/WSECCB website and be supported by the database of companies. Companies could register their own company to the directory and utilise the search facility to locate new markets, customers and suppliers. The general public could access the portal to find specific services within the MMP sector to increase the amount of waste that is reused.

If portal development is taken up it would be beneficial to the sector to include a forum or chat room for potential collaboration to take place. This may provide the incentive for collaborative activities to begin and clustering to naturally take place. This would also provide the opportunity for the public to post questions about product disposal and alternative options. Local MMP businesses could be encouraged to answer these questions thereby generating potential business for them. The portal could also serve as an information site to increase the awareness of policy and strategic plans for the management of waste within the county.

The portal would also be a resource that could be used within a branded cluster and this will be discussed later.

7.4.4 Promotional activities

The MMP sector has been seen to be fairly evenly spread according to the demographics of the county. Supply is such that current demand appears to be met. One of the aims of the research is to look to how demand can be increased thereby providing opportunities for supply to be increased to meet the additional need. Promotion of MMP activities and MMP businesses should help to increase the demand for activities within the sector thereby increasing the supply and diversity of MMP businesses. This may come in the form of literature on the sector, distribution of the directory of companies, workshops to increase the knowledge of the benefits of the MMP philosophy, and/or regular newsletters. These would increase the opportunities for information to be disseminated.

From a business growth aspect the information could be targeted through the database of companies and the impact of the information drive could be measured through a survey of those companies the information was sent out to. Bringing awareness to the sector will increase the understanding of the sector implications and may provide additional opportunities for companies to increase their own growth through the exchange of KT. A business directory could be sent to all companies to promote commercial MMP behaviour. The directory could include a list of all MMP companies and suggestions for how MMP activities can save business money and promote a ‘green’ business focus. Companies will be encouraged to ask to be included in the directory in future additions as this will essentially be free advertising. Businesses that take up any of the activities could be used as case studies in the future, again brining free advertising for the company. This encouragement of participating in MMP activities may contribute towards a naturally developing MMP cluster in the future.

From a public perspective promotion could come in the form of leaflets and posters placed in key locations throughout the county such as libraries, town halls and shopping centres. Press releases and promotional stands at local events would attract a wider audience. Increasing awareness of local schools of the potential of MMP sector would encourage the next generation towards sustainable consumerism.

A directory of participating MMP business could be provided to encourage the general public to look for sustainable ways of extending the life of products or disposing at end of life. This directory could be similar to that provided for businesses as this would increase the probability of local companies actively wanting to be part of the directory if they saw the potential increase in customers. As public awareness increases it would be hoped that MMP businesses would increase in activities thereby providing a platform for additional industry to develop.

7.5 Developing a Branded Cluster

If WSECCB decided to pursue a potential facilitation of cluster activities for the MMP sector to develop there are a limited solutions available. It is important for the Council to first decide the input that they would be prepared and able to make as this will affect the likely outcomes of the cluster facilitation. The most transparent and manageable cluster type is the branded cluster.

A branded cluster has an identity and engenders a sense of 'belonging' to a likeminded and supportive group. A common goal and aspirations provide the impetus for the cluster to develop and successful activities geared towards growth and cost reduction ensure the cluster grows and develops sustainably. For a branded cluster to work it needs:

a. A name – something easy to remember and market but also applicable to the sector
b. A purpose – this could be policy led (need to achieve environmental targets), industry led (growth of sector), or solution led (a desire to reduce landfill)
c. Leadership – either industry led in the form of a large company or main supplier or local authority or association led (such as the Chambers of Commerce)
d. Identified benefits – stakeholders need clear knowledge of what benefits they can achieve from belonging to the cluster
e. Realistic inputs – if the resources are not fully understood or committed there will be an early break from the cluster

As explained in the previous section, the name of a brand can help to evolve a strong sense of commitment and belonging. The MMP sector is diverse and the format unclear therefore the chosen name must allow both the sector and the consumer to visualise the purpose and intent. The purpose must also be clear to all stakeholders. Different stakeholders may have differing needs and perceived benefits from a branded cluster but the cluster itself must have a specific aim to be effective.

8 Conclusions

The MMP sector is fairly diverse and in many instances the companies such as furniture and books are traditional and long standing. The remanufacture and refurbish aspects of the sector are fairly immature and unrelated to each other and ultimately the sector is not yet established enough to be seen as a sector in its own right. This provides many opportunities for promotion and increased growth but may cause problems when trying to define and facilitate cluster objectives and activities.

There is a great deal of potential for the sector to grow and develop as the drivers have been identified as quite diverse and far reaching in terms of local and national impacts. The sector will evolve as trends and fashions change and the economy starts to recover therefore there is sound argument to support the sector now when behaviours and attitudes can be cemented.

It is unlikely that West Sussex could become the central cluster for this type of sector as the industry itself relies on local custom in the main. The online companies that are evolving are national and would be unlikely to take part in any cluster activities. Where WSECCB could make a significant impact is with collaboration with the local district and borough councils as this could improve the apparent differences in focus and practice of the current waste measures in these areas. Including in the countywide waste a plan clear linkage between local authority waste practices and the MMP sector would ease the confusion of the public and draw the focus to a central and achievable objective. This could just mean incorporating the recommendations for local authority collaboration and an indication of promoting an MMP directory or website/portal, or it could include a holistic approach to the waste policies and the incorporation of the MMP recommendations to a greater degree.

The nature of the industry also allows for new businesses to emerge that are difficult to locate and who tend to remain very locally focused. Keeping track of these industries would be difficult for one central authority led role. Providing the opportunity for companies to register themselves would be a more effective method for updating the database and local sector knowledge. Companies are unlikely to register themselves unless there are known and proven benefits from doing so and this is where the opportunities for a branded cluster come into their own.

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10 Appendix 1

Sustainable businesses needed for university study

West Sussex companies that save old products from landfill are being sought for a new research study by the University of Chichester and West Sussex County Council. There has been a recent growth in businesses increasing the life span of products by refurbishing, remanufacturing or recycling them for future use. The cost of landfill, pressure to recycle and the current economic situation means that companies and the general public are becoming conscious of the replacement and disposal of products.

Now the University and County Council, on behalf of the Environment and Climate Change Board, want to hear from businesses operating in the Maintain, Mend and Pass-On sector, allowing them to map the size and scope of the field. This will then mean greater business support can be offered to them.

Dr David Cooper and Dr Dawn Robins from the University of Chichester are leading the project. Dr Cooper, who is the Business Development Director at the West Sussex institution, said: “There is an emerging gap in the market whereby companies can profit from adapting, refurbishing, maintaining or recycling both domestic and commercial products that would previously have gone to landfill. This may involve adding value to a product, repairing or maintaining a faulty product or even recycling something in to a completely different item.”
“We want these businesses to get in touch with us, give us a short summary of what they do, allowing us to build up an accurate picture of the county in relation to these businesses and their practices.”

Businesses should their information to Stephen Utton at the University of Chichester by emailing makedoandmend@chi.ac.uk.

11 Appendix 2

Link to the West Sussex Environment and Climate Change Board website: http://www.westsussexclimatechange.org.uk/groups/b2b/maintain-mend-and-pass-directory