



Intellectual
Property
Office

IPO 2020

For discussion: the IPO five year strategy

INTRODUCTION

Seeing into the future and planning how to engage with it is always challenging. As we come to the end of one five year strategy period and work towards the next, we want to involve all those with an interest in IP in the development of our plans so that they can share in the direction setting process for the Office.

What follows is early thinking around our strategic ambitions for the next five years. We have drawn on our experience from the last strategic plan period, our view of the future context and our interaction with the spectrum of IP interests to bring together this first outline of our plans.

We are presenting this now, before it is worked up into our final strategy, because we would like you to examine where we have got to and help further refine and prioritise our activity. In this document you will find six strategic goals that we have pencilled in for the period. Each is underpinned by some specific outcomes that we think we need to achieve to be successful in our goals. We have then provided a commentary on what working towards each goal and possible outcomes could mean for us, some of the things we might work on, things we will need to overcome and some choices we may need to make. What it does not contain at this stage are any concrete proposals on how we will measure success. These will be critical to the final strategy document and will be included in the next stage of the drafting process.

We will be grateful for all observations, but are particularly interested in views on:

- Have we missed an important outcome, or are any of the outcomes ones which you would question? Which are the most important?
- What needs to be done first? Everything contained in our current thinking is a priority for us, but it cannot all be done simultaneously. Some things, such as providing new digital services for customers, and adapting to digital change are obvious issues for immediate focus, but what else needs to be done up front?
- Do you have any views on what success would look like for the outcomes or the best way to measure our progress?
- What other threats/opportunities do you see emerging in the period which should be priorities for us?
- Given continued pressure on budgets, does any of this feel discretionary?

We are keen to move this on and get onto the work of defining our final strategy. We would welcome comments by 22 May to IPOstrategy@ipo.gov.uk.

ABOUT US

Our Purpose

Making life better by supporting UK creativity and innovation

Our Mission

Dedicated to giving everyone the confidence to make best use of IP

We have a proud history of innovation and creativity in the UK. We gave birth to the first Industrial Revolution; British engineers pioneered the jet engine and developed life-saving treatments to fight infection and other illness; and we remain in the vanguard of new developments from life sciences to composite materials, from large scale civil engineering to nanotechnologies. Goods originating from British tradition retain their allure: luxury brands such as Jaguar and Burberry are coveted beyond our shores. We also enjoy a rich cultural heritage, and the creative industries continue to make a vital contribution to our economy. To take one example, in 2013 UK music artists accounted for a quarter of all European album sales and a tenth of artist albums sold in the US.

Inspired and inspirational ideas play a key role in the UK economy and, in terms of investment, an increasingly important one. Indeed, investment in intangible assets has outstripped investment in tangible assets every year since 1999, and the trend is of a widening gap.

The IPO is responsible for UK IP policy, granting UK patent, trade mark and design rights, improving IP awareness and education, and supporting effective IP enforcement. We have a strong international reputation for the quality of the services we deliver and the contribution we make to international thinking on global and European IP policy challenges.

In this way, the IPO supports innovation and creativity by encouraging investment in such activity, ensuring that the results of that investment are used and adequately protected, through a clear, accessible and widely understood IP system. The IP framework we deliver should incentivise and protect investment in IP while allowing knowledge to be shared and disseminated. A balance here is critical for innovation and creativity to flourish. By getting this right we will give everyone the confidence to make the best use of IP. This confidence can stem from many factors: protection which can be relied upon; our helping to resolve uncertainty around IP, both directly and through education; that we provide rights with a high presumption of validity; our work to give consumers the sense that IP also works for them.

This can require difficult judgements about issues such as the length and breadth of protection, how protection is balanced against other public goods and the penalties associated with infringement. There are no a priori answers to this, and the IPO's approach is to base our judgements primarily on the best available empirical evidence about what will maximise the economic growth which is generated by innovation and creativity, whilst also recognising the social benefits. That also means we need to be attuned to external trends and analysis: open to new information about how innovation takes place and abreast of market and technological advances.

This strategy is designed to show how we will champion IP in support of innovation and creativity, both within Government and the wider economy and society. The box below summarises our underlying philosophy.

Our Approach

We will:

- Work domestically and internationally to encourage an IP system that serves all in society, meeting customer needs and supporting the innovation and creativity that will bring prosperity and growth.
- Promote IP policies which both provide appropriate protection for the interests of rights holders and enable the legitimate transfer of knowledge within the wider economy and society.
- Continue to absorb the views of our all of our stakeholders, testing them before drawing on their experiences when making decisions.
- Base our activity on the best evidence available.
- Be agile, working hard to spot future trends and then match the pace of their development.

THE CONTEXT

In a world of ever greater international competition, of emerging economic and technological superpowers like China, the future prosperity of the UK depends upon our ability to produce goods and services that stand out from those of our competitors because of the quality of the ideas they embed - whether through their design, their technological innovation or their creative merit.

IP is increasingly important to business success with the growth of cross-firm collaboration and greater cross-border activity (trade, investment, e-commerce, collaboration, research etc). Managing and protecting a business's IP proactively will need to become an automatic element of doing business in the future, not a specialised area for a limited number of firms. This is not just true of large corporations: SMEs will also need to be IP savvy.

Domestic growth continues and there is reasonable cause for future optimism; however, shocks in the Eurozone and further afield could have a negative impact. That being said, demand for our services rose during the period of recession and low growth, so it is reasonable to expect this to continue, if not increase, if the economic recovery is maintained. The continued emergence of the new economic powers such as China and India will both pose challenges to the UK and provide opportunities: challenges in the shape of competition for markets and resources as well as possible dilution of our influence in the international system; opportunities in terms of fast growing markets for UK branded and high value-added goods and new partners for research and development.

On consumer attitudes to IP there are conflicting dynamics. On the one hand there seems to be a growing awareness amongst consumers of piracy and the wider damage it does. On the other, there is frustration in some quarters that IP rules may be limiting the potential of new digital technologies. This in turn could undermine the work that has been done to improve respect of IP rights and ultimately their enforcement at home and abroad.

A further complicating factor is the ever shifting balance between the creator and the consumer: the line between them that was once stark is now blurred. With new technologies such as 3D printing and a plethora of publishing platforms, consumers have now become creators: ideas can be transferred at the speed of light and spread virally across the internet. Ensuring that the IP system remains relevant in such a fast moving environment is a global challenge.

STRATEGIC GOALS AND OUTCOMES

GOAL 1: PROMOTING UK GROWTH THROUGH IP POLICY

DESIRED OUTCOMES

- i. IP systems are simpler to use and less costly to operate.
- ii. Improvements in the EU and UK IP framework keep pace with technology and markets, incentivising innovation in UK businesses.
- iii. UK businesses, including small businesses, are more confident in operating internationally as a result of better IP protection globally.
- iv. The UK copyright system encourages creators while also supporting the wider information economy and being fair to, as well as understood by, consumers.

Commentary

Setting the right IP framework will continue to be important in supporting UK growth. We will pursue an IP environment at domestic, European and global level that is cost effective, provides appropriate protection for ideas and supports national prosperity.

Within Government the IPO has policy responsibility for the IP framework and will champion the role of IP in enhancing creativity and innovation in the modern economic environment. We will ensure that IP's role in underpinning the wider goals of competitiveness and growth is well understood, helping us to enlist the support of the rest of Government in delivering our goals.

Our influence extends beyond the UK: strong domestic performance, highlighted in global IP surveys by Taylor Wessing (UK ranked 1st) and the American Chamber of Commerce (UK ranked 2nd), gives us the expertise, influence and credibility to also play this role internationally.

All IP rights involve conflicting interests and changes to frameworks are frequently contested. We will champion IP, but with an overall eye to what helps innovation and to wider Government policymaking. Key to this will be building a shared understanding of where the public interest lies. Part of this will be ensuring our research efforts and wider horizon scanning anticipate technological and market change. We will aim to achieve this with active, open and imaginative stakeholder engagement, whilst commissioning and effectively using evidence. Open policy making will be critical: we must continue to engage at an early stage with a comprehensive range of interests and ensure we hear, and absorb, their views. However, we must also be pragmatic; consensus is not always possible and we must have the courage to develop proposals which may not meet everyone's interests, if we believe they will support innovation and creativity overall.

If and when we intervene we must choose the right vehicle. Regulatory change should not necessarily be the first resort domestically or within the EU, if we are to reduce the burden of legislation. Further, legislation cannot always keep up with market developments. Alternative mechanisms such as industry led initiatives, for example the Copyright Hub, or government-industry co-regulation need to be given priority where appropriate

Domestically, our legal framework has undergone significant change over the last few years. It is well regarded but we are not complacent and will look to ensure it remains up to date and relevant. That said, Europe will play a key role in shaping our domestic regime in the coming years. For example:

- the EU trade mark reform package should deliver a more streamlined trade mark system, reducing costs
- on copyright, changes to EU law are likely to be the biggest influence on the UK system; we must continue to build our understanding of IP in digital markets and establish the IPO at the head of what works in relation to copyright enforcement
- implementing the Unitary Patent and Unified Patent Court to make protecting inventions across Europe a simpler proposition will be a key priority for the forthcoming period
- the European Commission's evaluation and possible reform of the EU design system.

Within the term of this strategy the UK is due to hold the Presidency of the Council of the EU in the second half of 2017. Clearly this will present additional challenges for which we shall need to prepare and opportunities on which we will need to deliver.

Globally, businesses and consumers face a complex and somewhat fragmented IP system. We want to make it cheaper and easier for UK businesses with IP assets to do business internationally and to protect those assets. There is no single, quick solution: we are pragmatic and envisage an incremental approach, prioritising areas of maximum economic or business impact. These could include:

- better use of existing resources like the WIPO Patent Cooperation Treaty mechanism
- improving work sharing between national offices on patents
- strengthening international rules where there are gaps eg broadcasting, or
- harmonising areas such as patent grace periods where national rules differ.

By promoting strong IP regimes in key overseas markets, alongside effective protection in international treaties and trade agreements, we can help unlock and reduce the risks of foreign markets for our exporters. Our attaché programme will continue to be an important part of our international activities, both assisting UK companies who encounter IP difficulties in key markets and making the case to foreign Governments for better IP protection and enforcement. Our partnerships with other UK agencies will also increase our international reach beyond the attaché countries. We are aware that the message of the key role IP plays in underpinning prosperity for developed and developing economies is not always accepted uncritically. Unlocking progress globally will depend in part on demonstrating, through hard evidence, the contribution IP can make to economic growth and prosperity while leveraging our international reputation as thought leaders in this field.

GOAL 2: DELIVERING HIGH QUALITY RIGHTS GRANTING SERVICES

DESIRED OUTCOMES

- i. Customers are able to access all the services and information in a way they want, when they want.
- ii. Customers know what rights they need and how best to get them.
- iii. Businesses see a simpler and more seamless route to UK and international IP rights and complementary services that is joined up across government and worldwide.
- iv. New processes and technology make it easier for our people to give great customer service.

Commentary

A strong customer ethos has long been a hallmark of the IPO's service delivery; we have also always emphasised the importance we, and our customers, place on the high quality of our products and services. These values have formed the core of our competitive advantage, and will be the basis on which we will build. That being said, the customer has not been at the very centre of how we design our services from the outset, and our electronic provision is behind the best.

Our aim is to transform our organisation to become "digital by default". This means ensuring digital is the first way that is considered when carrying out a transaction – whether that is applying for a right, managing IP, monitoring progress or sharing data. It does not mean excluding those who have limited or no access to the internet – assistance and alternative means of obtaining services and information must also be provided where appropriate. Above all, it means an integrated approach to delivering a service or tackling a problem in the best way, using the most appropriate channels and technologies.

In introducing new digital services we will move away from systems designed for internal effectiveness and case processing to an approach which starts from the user's standpoint. Customer journey mapping is already providing valuable insights for changes we have started making, and will be central to successful transformation in the future.

Better management information is another key element of delivering effective services. By consolidating disparate data and enhancing our analysis capability, we will improve our understanding of the market and our forecasting, which will enable flexible resource deployment. Taken together, these changes will give us the opportunity to view how the office works holistically and look for ways to optimise our processes and structures for the benefit of our customers and colleagues.

We are dedicated to giving everyone the confidence to use IP rights effectively. It can be unclear to customers what the best service for them is and how to get it from us. Some of this can be attributed to complexities in the law, but it can also be due to us not offering customers modern ways of accessing their applications and information about them. As well as working hard on IP education, we can help people get the service they need more easily by building advice, prompts and validation into our processes and interfaces. By offering self-service and allowing customers to interact according to their own requirements, we will enable them to access the level of service that best meets their needs. In support of this our culture will change so that registered rights and their applications are viewed as jointly managed with customers, rather than something done from our side alone. We must recognise that different customers may have different needs and we will treat them as individuals rather than categories.

We shall join up all the channels through which customers engage with us – digitally, face-to-face, through intermediaries and so on. This means really understanding our customers' journeys, not just through the IP part of their business development, but more widely. Understanding the requirements of all our different customers, especially start-ups, and anticipating what ancillary or related services they might need or find helpful, is problematic. We want to be able to do that, using smarter data analysis and working cross-sectorally with domestic and international partners (such as UKTI, Innovate UK, other IP offices) to identify connected services. That way we shall not only link existing services with those of other providers, but also design new innovative ones in collaboration with them, with the purpose of making life easier for customers.

Our people already give great customer service: we will make it easier for them to do so, by:

- Being ambitious
- Maintaining a steely focus on quality
- Using efficiency gains to enable better quality services
- Leading with good forecasting and flexible resource deployment
- Ensuring we design services that are value engineered.

This change portfolio will touch every corner of the organisation, and will link closely with allied activities such as “Adaptive” so that we are genuinely organised for success. Overall, this will produce a steady flow of benefits that make a real difference across the life of the strategy. While we undergo this transformation we will retain a sharp focus on our existing customer service, as well as supporting the other significant changes outlined in this strategy. We are adopting “Agile” approaches to transforming not just our systems and processes, but also the culture behind them, and we shall put in place best-practice governance that provides necessary assurance without hindering the business from rapid development and implementation of excellent digital rights-granting services that offer true value-for-money for users and the wider public.

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GOAL 3: ENSURING IP RIGHTS ARE RESPECTED AND APPROPRIATELY ENFORCED

DESIRED OUTCOMES

- i. Consumers and users are educated to the benefits of respecting IP rights, and do so.
- ii. Rights owners and rights users have access to proportionate and effective mechanisms to resolve disputes and tackle IP infringement.

Commentary

Ensuring that IP rights are respected in turn helps to ensure that innovators and creators secure a fair return on their investment and are able to generate economic value for the UK. Although the IPO is not an enforcement authority, we play a key role in ensuring that there is an effective infrastructure which both promotes respect for intellectual property rights and ensures that there are mechanisms in place which tackle infringement and allow disputes to be resolved.

Educating the young is vital, but young people can be hard to reach, especially with potentially dry government messaging. Through the period of this strategy, we will work to ensure that our young people understand intellectual property through the education system and other channels, preparing them for a myriad of career choices and enabling them to use online offerings both safely and legitimately. We will seek to build understanding of why intellectual property rights are important and how the individual might be called on to use them as an employee or entrepreneur. We will do this by ensuring that educators – in primary, secondary, further and higher education – can access teaching resources which make it easy for them to draw IP into lesson and lecture plans and understand the value of doing so. Ideally, IP would be an integral part of the core curriculum, but we know many teachers already feel that the curriculum is at capacity. Our challenge is to develop messages and materials which teachers and young people alike find both persuasive and worthy of inclusion. We will complement this work through other

engaging mechanisms outside the schoolroom such as continued investment in the *Music Inc* app game, which builds understanding of the impact of music piracy.

IP infringement is often seen as a victimless crime. Quite apart from the economic damage, consumers are often unaware of the linkages between IP crimes like counterfeiting or illegal downloading and the drugs trade or terrorism. In addition to our work to reach out to those in education, we will work with partners including Trading Standards and the Police, and with industry to help consumers understand the risks associated with IP crime and the damage it does. We have had success here already and are already supporting several cooperative initiatives. We will need to ensure our role is balanced, getting proper value from effectively run projects, whilst also recognising that much of the benefit comes from projects being led and shaped by industry.

We will also work with the EU and international partners, such as WIPO, OHIM, and individual states on awareness raising projects. The EU Observatory on Infringements of Intellectual Property Rights is already pushing in the same direction. There is potential here for significant cooperation which we will fully explore. However, working with larger bodies such as the Observatory and WIPO will be challenging as we are competing with other member states for air time and funding. Building consensus on the general approach to take (whilst allowing for cultural variations) will help here.

Educating the public to be intolerant of IP crime is important, but will not remove the need for effective mechanisms to resolve all sorts of IP disputes and tackle IP infringement. We will continue to work with a range of intermediaries including search engines and ad businesses to reduce access to and support for sites that facilitate infringement online. Our role in this sphere is bringing thought leadership, building infrastructure and partnerships, providing the Intelligence Hub and some service development.

On IP enforcement we have significantly increased our activities in recent years and are already respected as a thought leader in this area. We remain committed to having an enforcement framework that is accessible and affordable, and one in which we can continue to add value. Later this year, following discussion with our partners in enforcement and industry, we will set out our renewed approach on IP enforcement, acknowledging what still needs to be done and the role that the IPO can play in bringing about a further step change in this area.

IP disputes are an inevitable part of any IP framework, but they can have an exaggerated impact on the use and perception of IP. For example they can divert resources away from activity that promotes economic growth, and they can favour larger businesses which might have more of an appetite for litigation and a greater ability to absorb the associated costs. This may mean that smaller businesses feel unable to take action when their legitimate rights are infringed. The Intellectual Property Enterprise Court (IPEC) provides a streamlined and more cost effective forum for

suitable cases. However further opportunities exist; we will work to widen access to justice and improve confidence by promoting simpler, cheaper and quicker dispute resolution, freeing time and resources to allow businesses to focus on growth, in particular:

- Exploring different ways to manage the cost of disputes, such as litigation insurance and other products. We recognise that whilst we have a central role in making the case for change, the development of new mechanisms to manage the costs and risks of IP disputes will require buy-in and an operating change from key private sector interests, such as insurance companies.
- Enhancing IPO services to support dispute resolution such as our opinions services and mediation. Success here will require careful balance. A greater uptake of existing alternative dispute resolution (ADR) services and the development of new ones (designs opinions) will have a resource impact at a time when increased demand for our rights granting services and our digital change ambitions will also be calling on increased resources.

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GOAL 4: EDUCATING AND ENABLING BUSINESS TO UNDERSTAND, MANAGE AND PROTECT THEIR IP

DESIRED OUTCOMES

- i. Businesses understand how to manage their IP effectively to support growth, and take action to do so.
- ii. Businesses can find the help and support they need to manage their IP well
- iii. Businesses can find employees who understand IP

Commentary

Modern technology has enabled a proliferation of business models away from the traditional develop and take to market approach. An example is the success of businesses such as ARM, which develops its IP before licensing it to other high value businesses such as Apple for mass production and sale. Stories such as this have lifted the awareness of the potential of IP: this needs to be translated into business activity. Our goal is to ensure all businesses know how to manage and use their IP effectively.

We already provide an outreach function but just doing more of the same will not match our ambition. Whilst we are already making progress to raise awareness amongst businesses, the challenge is finding a way to scale up our impact within a sustainable resource allocation. However, there may be the need to devote more resources to this than we do at the moment, but this will compete for resources with those needed for the increased demand for our rights granting services (which fund all of our activities) and our change programme.

We will develop a better evidence base of our customer behaviours and needs, improving and formalising business needs intelligence to stimulate more interest from our target businesses, other policy makers and providers of business advice. By gaining a greater understanding how businesses use IP and what hinders or helps effective IP management, we can further make the case for intervention and identify the changed behaviours that would result. Knowing what should work will not be enough: we will have to work collaboratively to secure channels of

communication and identify those who can multiply our message. Some sectors are easier to reach than others: we will identify the gaps and target them appropriately. Whilst delivering outreach events directly will continue to be important there is a natural limit to how far this can activity can go. Therefore, we will have to secure space in public and private sector business adviser activity. The further development of easy to access online tools, allowing others to act on our messages will help us here. Finally, we have a commitment to evaluating our activities so we can identify the impacts of different approaches and feed these results into future business outreach.

Ensuring that businesses can find employees who understand IP is fundamentally an issue of higher and further education. Influencing leaders in this sector will require smart and targeted activity. We will first have to identify the levers for change, for example the Government's encouragement of a focus on employability as an outcome of HE/FE, and use these to build stakeholder support. Our messaging and actions will need to articulate the case, demonstrating where the gaps are currently and how they can be filled. Colleges, Universities and individual academics are independent thinkers who will require a compelling case from us to modify their approaches to course content. Even communicating with such a disparate audience presents specific challenges and the need for different approaches. We will require a strong network of partners to support our message and help deliver it and colleagues in Government can help us to better identify and understand routes for delivery.

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GOAL 5: IMPROVING THE SKILLS AND CAPABILITY OF OUR PEOPLE

DESIRED OUTCOMES

- i. Our people will understand the purpose, goals and priorities of the IPO, be really clear about the skills they will need to do their jobs and will drive their own development.
- ii. Our structures, processes and people policies will be enablers of flexibility and business change.

Commentary

To achieve the ambitions we have set out in this strategy, we must ensure we continue to provide our people with world-class skills. The environment within which we are working is fast changing, we are seeing new and emerging technologies, our customers are demanding better and more efficient services, all of which means we need our people to be ready to respond to these challenges. Helping our people to understand our future goals and the skills they need to support the business will be key to ensuring the IPO remains sustainable in the future.

To fulfil our role in championing IP in support of innovation and creativity we will require a workforce that is agile, multi-skilled and able to anticipate change. For our people to thrive and deliver the very best they must operate in an inclusive, open environment where diversity is encouraged and differences are valued. We will need leaders who are inspirational and confident, whilst empowering their people. More widely, our people will be given the skills needed to anticipate change and be empowered to innovate and make change happen. We will ensure our future leaders are identified and developed, so that we succession plan in a way that allows us to maintain the leadership culture we are putting in place. Engaging our people in this journey is essential, as we cannot succeed without them. Cultural change can be challenging: it is subtle and will take time to achieve.

Organisationally, we will look at our operating model so that it fits the requirements of the digital age. Reviewing our operating model will clearly have implications for us as a business and we will need to take our people with us as we develop our thinking. We will need to consider the way we deliver our services to our customers and find new ways of working which may require different skills. We will remove bureaucracy from our internal processes and people policies so that our people are not stifled by the system.

GOAL 6: INCREASING EFFICIENCY AND DELIVERING VALUE FOR MONEY

DESIRED OUTCOMES

- i. We will deliver for our customers with demonstrably increasing efficiency and effectiveness.
- ii. We will operate on a business model that is robust, realistic, future-focussed and adaptive.
- iii. We will have a sustainable working environment that enables our people to deliver our goals effectively.

Commentary

Our approach of investing in our people, infrastructure and environment has proven to deliver increasing efficiency and effectiveness, allowing us to reinvest those savings into further initiatives. It will continue to serve us well during the lifetime of this strategy. However, given our range of activity from rights granting to policy, it can be tricky to devise an overall measure of efficiency: clearly a one size fits all approach is not suited to our diverse operation and bespoke approaches need to be devised for each activity. Over the life of this strategy we will be clear about how we measure our improving efficiency across the organisation.

We intend that our digital transformation be a key driver of increased efficiency and productivity. Having the means does not guarantee the result: the benefits of digitisation must be harnessed and embedded within our culture if we are to realise their full potential. We will look beyond the traditional models of working and explore flexible and home working policies to seek increased engagement and productivity.

Changing customer behaviour can also contribute to efficiency. For example, we have begun the process of reviewing our fee structure: the outcomes from this may enable us to incentivise those utilising our services to adopt the most efficient method of access.

The IPO is seen as successful financially, being able to self-fund the broad range of activities it undertakes to achieve its goals. A successful operation can become complacent. We will encourage a “why” culture to avoid entrenched attitudes to our current ways of working and release new opportunities, a culture where change is constant and the norm. A particular example of this will be our pursuit of efficiency savings through

shared corporate services - we have already embarked on a novel innovation partnership arrangement with Companies House to share their Finance System and Finance Director. Further opportunities exist with both Companies House and other BIS and wider Government organisations.

Our business model needs to be realistic and adaptive. Our income can be predicted to a certain extent, but it is impossible to fully control. Imminent developments such as the Unitary Patent could significantly impact our current business model, either through increased domestic demand or a reduction in EPO renewal income. Meeting a sudden increase in demand for our services could present difficulty, recruiting and training trade mark and patent examiners takes time and money. Of course, these impacts would not be immediate and our long term planning will mean that our reaction can be phased in over time. Whilst the IPO as an organisation has had many successes in a broad range of activities, we recognise that we must match activity to our income, which is provided by users of registration services. Our approach must be to prioritise our core rights granting business.

Given our perceived success and financial security, we are increasingly called upon to provide resources that it is believed others cannot. However, budgetary pressures raise questions about the sustainability of this approach and difficult choices may need to be made about where to lend support, with industry partners asked to play an increased role. The ability to prioritise, along with improving the forecasting of our expenditure will allow us to get the most from the income we generate.

Providing a sustainable work environment will require us not only to consider the physical office space, including IT, but also our ways of working. Our main base, Concept House in Newport, currently hosts over 900 staff, with our headcount set to increase in line with demand for our services. It has recently gone through a major transformation but continued investment in this space will be necessary to ensure it continues to support our first class operation. Our commitment to continuously improve the way we do things will significantly benefit our customers and our people.