Summative Assessment of the

Cornwall FLOW Accelerator project

A Report to Celtic Sea Power

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Summary

Has the Cornwall FLOW Accelerator project worked? The core team is in no doubt:

> Absolutely; it's done what it says on the tin
>
> Where we're at is extraordinary
>
> We've delivered on expectations; everybody's saying that FLOW is an opportunity
>
> I think we've done a good job. The question is what happens next

We agree. The Cornwall Floating Offshore Wind Accelerator project has more than achieved what it set out to do with impressive clarity of ambition and quality of execution.

Recommendations

The story very much does not end here because although this project is about to close the bigger job of ensuring that floating offshore wind comes to the Celtic Sea, and that Cornwall benefits to the maximum from that, is far from done. We therefore draw on our findings to offer the following recommendations to emphasise two points:

- Recommendation 1: keep the team together. The quality of the core team and its unique collection of expertise on the Celtic Sea is central to the success of this project and to CSP's success, and it will be central to the success of the next phase, so its important to keep the team together. That includes working together to ensure that every partner has the resources they need to contribute to the full;

- Recommendation 2: once The Crown Estate has begun the formal leasing round CSP should take the opportunity to refine its approach for the next phase (when, for example, potential bidders will be very keen to listen still and understand capability in the supply chain, but are likely to be very coy about what they say), thinking through how its role should change, and how to communicate that refined role to those who need to know.

- Recommendation 3: be mindful of how lessons learned in Cornwall could be applicable to and benefit the wider UK offshore wind energy sector. The floating wind opportunity in the Celtic Sea does not operate in isolation and many of the companies, technologies, problems and solutions that form part of the Accelerator can also be found elsewhere in the UK. The Accelerator could enhance its impact by considering this when designing its programmes.

1. Introduction

1.1 The Cornwall Floating Offshore Wind (FLOW) Accelerator is a £6m collaborative project led by Celtic Sea Power and working in partnership with the University of Exeter, the University of Plymouth and the Offshore Renewable Energy Catapult. The project is part-funded by the European Regional Development Programme (ERDF) to some £4.8m and under ERDF rules Celtic Sea Power must provided a Summative Assessment of the project before the funding ends at the end of June 2023. Celtic Sea Power commissioned The Mackinnon Partnership, working with Biggar Economics, to provide that Summative Assessment and this is our report.

1.2 The project's title gets right to the heart of what it is about:

- Cornwall, because this is about maximising the benefit of floating offshore wind in the Celtic Sea *to Cornwall*. The operational area in the sea can be reached just as well from Wales, which has among other things larger ports, so maximising the benefit to Cornwall requires focused effort;
- FLOW, because the focus is Floating Offshore Wind;
- Accelerator, because this is about *bringing forward* benefits which might otherwise take longer to achieve.

1.3 The original proposal talks about -

> a short window of opportunity for Cornwall to capitalise on the transformational economic opportunity, which Cornwall's offshore renewables industry's pioneering capabilities and the county's geographic position represent, by creating the conditions for the build-out of large scale FLOW off the Cornish coast from the mid-2020s onwards *[our emphasis added]*

1.4 There is therefore a degree of urgency about the project, and a clear-sighted focus on setting-up the opportunity in such a way that much greater benefit will follow than if intervention had not happened. The ERDF-funded project is a means to the achievement of greater ends.

1.5 Much of the focus of the project is on clearing the way for successful exploitation of the FLOW opportunity in the Celtic Sea, through the creation of tools and processes, like the collection of data, which will help to attract developers to base themselves in Cornwall (or grow their Cornish operation), and to develop and sustain a supply chain in Cornwall.

1.6 Full success therefore does not lie wholly in the hands of the project, but requires the more demanding task of getting those developers and suppliers to change their behaviour, to choose Cornwall where they might not have done, to choose to act sooner than they might otherwise have done, and to choose to do more than they might otherwise have done. There is a good deal of scope therefore for the results from the evaluation to feed further discussion within Celtic Sea Power about lessons learned, and what to do next.

1.7 Celtic Sea Power summarises the work of the Cornwall FLOW Accelerator (CFA) project as delivery of these three broad objectives:

- a coordinated series of data campaigns to provide a pilot for an integrated development process to accelerate project timelines and reduce the carbon cost of surveying;
- a sustainable regional industry by collaborating with regional ports and Cornish companies to expand capacity, skills and workforce so that they can form a key part of the supply process;
- research and development in low carbon technologies and methodologies for the installation and maintenance of floating offshore wind turbines.

1.8 The project is funded under Priority Axis 4 (PA4) "Supporting the shift towards a low carbon economy", though a number of those involved noted that in many respects it is more like a PA1 project "Promoting research and innovation". The project operates through seven Work Packages (originally four), each of which is under the operational leadership of one of the partners, and the overlap between the two priority areas as clear from the list:

WP	Title	Summary of Activities	Lead
1	Project Management	Monitoring, evaluation, claim management	CSP
2	Lidar validation for low carbon Investment	Develop scope of campaign, Procure Lidar campaign, develop data sharing portal	CSP
3	Low Carbon Offshore EIA strategies	Low carbon sensor technology, platforms and data concepts	UoP
4	Innovation in low carbon design and manufacturability	Review OWIC roadmaps, design and introduce low carbon manufacturing processes	OREC
5	Low carbon offshore processes	Modelling and simulation, logistic and O&M strategies, and vessel and energy vector integration	UoE
6	Low Carbon Simulator data platform	Establish requirements, set up data store, align with industry	OREC
7a	Low carbon FLOW simulator development	Programming of simulator elements and validation	UoE
7b		Procure DP simulator and integrate into complete FLOW simulator offer	UoP
8	Dissemination	Dissemination of research outputs	CSP

Approach and Methodology

1.9 By agreement with the Project Manager we approached our task as follows:

- keeping the distinction clear in our minds between the need to meet the formal targets agreed with the funder, and going beyond that to make a real difference in the development of Floating Offshore Wind in the Celtic Sea;
- an initial briefing from Celtic Sea Power;

- review of our original proposals and provision of a brief inception report;
- review of project data, particularly quarterly progress reports;
- interviews with key project personnel, both inside the project team and stakeholders beyond it;
- interviews with developers and key target businesses.

1.10 We are grateful for the open and willing way in which everyone we interviewed responded.

2. Delivery and management of the project

2.1 In this section we consider the delivery and management of the project, drawing primarily on evidence from project partners and others outside the project with good knowledge of it.

Suitability of the design of the Cornwall FLOW Accelerator project

2.2 We asked partners and others whether, in the light of experience, the design of this project was right. Everyone said that it was, with initial comments like "absolutely" and "very good actually", and some interesting further responses to add shade to those summary words.

2.3 Several noted that the project had been able to "flex" or "morph" in line with changing circumstances and that the original design was flexible enough to permit this. Those changing circumstances include a big increase in the ambition for the Celtic Sea; by the time the project was agreed the aim was 4GW, and now the talk is about ensuring that everything is designed with a possible additional 20GW in mind.

2.4 It is a notable success that CFA has been able to work within the spirit of the original design and has not been unduly constrained by it. Through the CFA project, CSP has, for example, added three new work packages as it re-assessed requirements, notably adding a "workforce" strand and establishing a ports working group, it has set up the Celtic Sea Cluster and completed more environmental impact assessment than originally planned, and the team has been able to keep focused on building long-term relationships rather than being distracted by the need to hit short-term targets. One team member commented that as a result there is a good deal more content to their work, and more added value, than originally envisaged.

2.5 Partners also noted:

- this project worked well with the existing Marine-i project, drawing on its strong list of marine tech companies based in Cornwall and the Isles of Scilly, running a number of joint events, keeping each other informed and frequently aligning their activities. The two projects complemented each other. Marine-i's project manager describes this project as "a good partner". This is no accident: all four partners in the Cornwall FLOW Accelerator project are also partners in Marine-i and the two projects' goals are clearly complementary;
- though it was approved as a PA4 "low carbon" project, much of the work was closer in nature to that of a PA1 "research development and innovation" project, and in practice it has been possible to embrace both aspects with no real difficulty;
- they were able both to draw on other expertise within their own organisation, and realise internal organisational objectives, particularly in terms of exposing other colleagues to the nature and scale of the opportunity in the Celtic Sea.

2.6 It is worth adding that though the Covid pandemic meant changes to how events were managed, it has not stopped the project from working effectively towards its goals.

Partnership working

2.7 The quality of the partnership, and working relationships between partners, has been central to making the project design work. One partner noted that:

> project partners have been very willing to be flexible

2.8 Another said:

> one of the great strengths of the project has been the partnership

2.9 A third:

> It's a very good project to work on. There's a lot of respect between the parties.

2.10 One of the reasons for this success has been that many of the team have had six years of working together through Marine-i which became a particularly strong partnership. Partners are all used to working together on an ERDF-funded project, and (as one put it) "know how to avoid getting bogged-down in the processes".

2.11 Everyone agreed that the project has the right partners round the table, including commercial expertise through its non-executives. One partner summed it up this way:

> As a partnership we're all delivering things we wouldn't have delivered on our own; take any one partner away and the project would be much less successful.

2.12 In practical terms there have been well-run operational lead meetings every other week, and partners have worked together on external events, with different organisations taking the lead depending on their expertise.

2.13 Partners also noted that they had adopted the lesson from Marine-i and shared targets between them, thus avoiding the difficulties which come with separate allocations and ensuring a strong customer focus.

2.14 Strong partnership is more than efficient and effective joint working however; it is a core feature of the project's design. It is central to the message to developers and to the potential supply chain that Celtic Sea Power is pointing to a big opportunity, and on behalf of all, identifying the scale and nature of that opportunity. By working together in this way CFA partners are doing essential preparatory work once, on behalf of all, avoiding the wasteful duplication of each prospective developer doing their own – and the risk not just of extended timescales, but that the full scale of the opportunity might be missed.

Changes in the external environment relevant to the project since it was designed

2.15 Internal coherence is one thing, but the external environment keeps changing, potentially challenging the continuing relevance of a project. How did this project fare against that test?

2.16 Again, everyone has responded positively on this front, noting that this project has adapted well to external changes from the increasing ambition for floating offshore wind in the Celtic Sea, the announcement of Freeports in both the South West and South Wales, and the advent of different bidding opportunities such as the long-awaited £160m FLOWMIS funding.

2.17 There are similar questions to be asked about complementary initiatives which, if handled badly, might duplicate this project's work, or distract from it. Again, this looks positive, whether the question is asked of academic projects run by either university or by the Offshore Renewable Energy Catapult (typically described as adding a wider perspective), or of Natural England's wider offshore wind research; in every case partners spoke positively about how the different initiatives have operated in a genuinely complementary way, for example:

> We all want to improve the data … It's been really, really, useful.

> [CFA are] "good partners … full of ideas … really open … mutually supportive.

What has worked well?

2.18 Those we interviewed offered a number of suggestions for what has worked well, and why.

2.19 The most consistent theme (with no dissenters) was that Celtic Sea Power is seen as unbiased, working for the wider public good rather than any partial interest. "They have more credibility than others" was how one national organisation put it. (It is worth pointing out here that while we explained to interviewees that we were evaluating 'the CFA project', not all knew enough to distinguish carefully between "CSP" and "CFA").

2.20 One partner noted that in time that position was likely to change; it applies while the first task is …

> trying to grab this opportunity for the UK; if we don't do that, there's no Cornwall opportunity

2.21 … but that there will come a time when the team is very clearly seeking to ensure that Cornwall gets its fair share of the benefits of floating offshore wind in the Celtic Sea. Even there though CFA has seen benefits in looking at the question more broadly, for example cooperating with colleagues elsewhere in south west England and in Pembrokeshire to explore the skills required in developing and operating offshore wind.

2.22 A shared sense of realism also came across strongly. An understanding that much of the economic benefit of floating offshore wind in the Celtic Sea would go overseas, and that Cornwall should play to its strengths, accepting for example that it is very unlikely that turbine blades will be manufactured in Cornwall.

2.23 Partners are very proud of the tangible outputs from the project. They commented most often on the Dynamic Positioning (DP) simulator developed by Plymouth University

> an amazing piece of work … an absolutely incredible tool

> The DP simulator is going to be absolutely phenomenal
>
> what a result!

2.24 … and on the publications (including data) on the website:

> We've been very, very, good at disseminating information

2.25 Interviewees also praised Exeter University's simulator, the many events run for the supply chain, the workforce project, the environmental work ("developers want something from us"), the creation of the Cluster, the ports working group, and getting key CFA people sitting round the right tables with the right people, regionally and nationally, to explain and promote floating offshore wind in the Celtic Sea.

2.26 As that last comment indicates, much of the project's success has been around building relationships, with central Government and The Crown Estate, with developers and potential suppliers, between companies, and so on, continually making introductions which might support the goals of the project, and backing those introductions with useful evidence, so that people see the opportunity and start taking an interest in it with less risk than if CFA had not intervened. It is in the nature of a huge commercial opportunity like floating offshore wind in the Celtic Sea, and the major commitment required by the public sector, that organisations are not always willing to acknowledge who and what has influenced their decisions, or may yet do so. And the full nature of success will only truly become evident over time as contracts are let and jobs are filled.

Prioritisation

2.27 Not surprisingly it is in the area of prioritisation that we heard a wider variety of responses, including some criticism. The project has covered a lot of ground, and a good deal more than originally planned, but it cannot do everything and CFA has had to prioritise, including making judgements about *when* to do certain things and the best order to do them in.

2.28 Falmouth Harbour is sure that it will play a major role in the development of the Celtic Sea and would have preferred CSP to reach that conclusion itself before now and resource planning in the port accordingly, including more specific advocacy for the facilities which Falmouth offers and could offer. Our understanding is that CSP has given the highest priority to making the case for the Celtic Sea in the round in order to ensure that Government, The Crown Estate, prospective developers and their supply chain all buy the idea and act accordingly, judging that other questions like which ports might be able to do what will come into play at a later stage.

2.29 One national organisation was a little surprised that CSP has not made more of the potential of Cornwall to support developments in the Celtic Sea – but acknowledged that there may be a question of timing there, and that the first priority was the bigger picture.

2.30 As a different example the Cornish Fish Producers Organisation has seen its priority as influencing the national picture in order to "mitigate the worst of it" (as it sees it) with the development of floating offshore wind in the Celtic Sea. Working with national partners in the National Federation of Fishermen's Organisations CFPO judged that their top priority was to influence The Crown Estate and developers (some of whom have sent their consultants down to Newlyn to consult the CFPO), though they acknowledge the contribution made by CSP and how valuable it was to have the organisation involved. Different organisations make different tactical judgements.

Unplanned benefits

2.31 Several interviewees pointed to unplanned benefits, not part of the original design of the project.

2.32 The workforce project was the example most often quoted. There had been an essence of it in the original bid, but the team quickly came to see that the workforce was an important part of the potential benefit of floating offshore wind in the Celtic Sea, which led to the creation of a separate workstream, and a separate project group.

2.33 In praising this work, one team member said:

> we could easily not have done it.

2.34 The project's work on concrete was also cited by several interviewees. It was in the mix originally but detailed work has shown its potential, and in particular the potential value to Cornwall and Devon of using concrete as a low carbon, locally-sourceable, alternative to steel. As one put it, "low carbon manufacturing" has become translated as "concrete manufacturing".

2.35 Of a rather different nature has been the opportunity to influence policy – always with the proviso that policy-makers will rarely acknowledge what has influenced them.

> I'm not sure that without this project we'd have had the level of interest from Government in the carbon intensity of FLOW.

2.36 CFA, claimed this interviewee, has planted a seed about that with Government and with The Crown Estate, helping to change their perception of a project which on cost terms alone does not look as strong as it does when the question of carbon intensity is included.

What have been the keys to success?

2.37 We heard several suggestions in response to our question about what have been the keys to the project's success. The most emphatic was

> The people: it's been a very people-based project.

2.38 The person who said that meant the team employed by Celtic Sea Power and its partners, many of whom have worked together before and are well-connected within Cornwall and beyond. The same point came up in another guise as a different partner explained the value of the many face-to-face events which CFA has put on, so that developers and suppliers could hear at first hand about, say, the results of the concrete project.

2.39 At a more strategic level has been that central design principle of the whole project to move away from "piecemeal consenting" to a "regional characteristics" approach – ie avoiding the excess cost (and excess carbon) of each player doing their own research, by working together on generic research which all can share. That has meant CFA partners on occasion working with the industry as a whole rather than with individual companies.

2.40 Another interviewee made the very interesting comment that "expectation management is key". What they meant is that CFA had to keep saying "FLOW is coming, prepare for it now, scale up" – without knowing exactly when the leasing round might be announced or what the results might be. He thought it had been a difficult balancing act, but one which CFA had successfully pulled-off.

Challenges and constraints

2.41 We heard relatively little, by contrast, about the challenges and constraints faced by the project.

2.42 The most frequent comment was about the short timescale, and the unsuitability of short-life funding for a major strategic opportunity of this nature. Partners all took the view, however, that they had to be realistic about what funding is available, and that they had made the most of their opportunity.

2.43 Everyone also agreed that much remains to be done, particularly once the main leases are let and more focused work can begin: working with companies that show some promise but have held back so far from a full focus on the commercial market, nailing down which ports and harbours can do what, realising the full opportunity of the two simulators and getting them into full use, and so on. One external partner commented:

> There continues to be work to do in explaining the narrative.

2.44 Others pointed to other constraints, like prospective site developers being reluctant to share much of their own data, the difficulty in explaining to people the balance CSP struck between promoting the Celtic Sea as a whole and their particular interest in Cornwall, or the complexity of working with ports when they belong to such a wide range of owners and ownership types (private, public sector, and Trust ports). The environmental survey works provided valuable insights for future marine operations in the Celtic Sea despite facing additional constraints due to worse than anticipated weather conditions.

2.45 At a detailed level we also heard how ERDF requirements can get in the way. Procurement rules are often quoted, but as we heard about the pushback from a handful of businesses it's worth noting that the process of signing them up under target C1, Enterprise receiving support, is also rather off-putting.

2.46 CFA has to send each business a summary of what support they have received using an hourly rate of £89 / hour. Many businesses wonder what this means and a few have said they will not continue to work with CFA as a result; ie they will attend an event, for example, but will not complete the paperwork so their attendance can be counted towards the project's targets. Ultimately that makes little difference to the project's ability to hit its target, but it does complicate relationships which CSP is trying to build for long-term success.

Next steps?

2.47 Everything will change gear once the main leases in the Celtic Sea are let.

2.48 Partners want to continue to work together, but they face different challenges in terms of future funding.

2.49 Cornwall Council has made a three-year commitment to covering Celtic Sea Power's core costs as a wholly-owned subsidiary of the Council, a crucial decision to secure the continuity of the team and its work.

2.50 Similarly OREC should be able to draw on its continuing core funding.

2.51 Things are more complicated, however, with the two universities. The four CFA partners plus Swansea University have recently bid for Place-Based Impact Accelerator funding from the Engineering and Physical Sciences Research Council. They should hear in July if they are through to the next round, with a final result in October – causing the usual difficulties around keeping the staff they all really need to keep.

2.52 Failure to secure this funding will make it very much harder for the two universities to continue working as part of Celtic Sea Power, at least to the full extent that they are now.

2.53 One of the partners noted that there is a degree of urgency about getting this right, "probably a two-year window of opportunity" to make the most of this opportunity for Cornwall before others catch up.

Lessons learned

2.54 Several partners commented that in designing this project they had drawn on their shared experience of Marine-i, from governance and management processes through to target-setting.

2.55 Several also said that they could have done with more time, enabling them for example to produce more data, one noting that "cutting-edge initiatives" in particular need longer.

2.56 One team member reflected that a couple of the initial work packages were not as well-defined as they could have been; bidding is often rushed, but better initial design would have saved time later.

2.57 And turning that general comment about timing into a particular suggestion, one partner suggested that projects which rely on employing people with hard-to-find combinations of skill and experience ought not to start until they had recruited those people (easy to say but rather hard to achieve in practice when aligning recruitment across several partners).

2.58 That there is a continuing need to support the wider Celtic Sea initiative was also a common theme, particularly in terms of communicating the nature and scale of the opportunity, and working with businesses to realise the benefits. For all the partners' satisfaction with a project well-managed, no one thought the job was done.

2.59 In process terms one team member commented that CSP ought not to get bogged-down in delivery; as a "big picture project" it should "be on the curve; if we start to settle down we'll hold things back".

2.60 And, in a related point, another interviewee said it was important to make processes and procedures less complicated.

2.61 OREC colleagues noted a lesson for themselves to do more to engage other Catapults in floating offshore wind, particularly the Connected Places, Digital Systems, and Advanced Manufacturing Catapults.

Cross-cutting themes

2.62 ERDF funded projects are expected to incorporate two cross-cutting themes, sustainability and equality and diversity.

2.63 **Sustainability** is very much at the heart of the Cornwall FLOW Accelerator project; the whole purpose of exploiting offshore wind is to find a low-carbon source of energy. And it has been striking how often in our interviews we have heard project staff and partners stress that they have been seeking "low carbon" ways of making floating offshore wind work; the work to explore the concrete alternative for the towers and platforms is a good example.

2.64 More formally, the project has written sustainable development into its processes and procedures, as evidenced by the detail set out in their Project Execution Plan.

2.65 The same applies to equality and diversity where CFA adopted a range of principles, practices and procedures early on, covering employment, procurement, promotion and dissemination. So far as we have been able to tell the project has followed-through on those commitments throughout its work and embedded them in the way it does business.

Conclusion

2.66 The original design of the project, in terms of its rationale, strategic approach, delivery and management, has stood up very well indeed in a fast-moving environment.

2.67 The Accelerator team, both within Celtic Sea Power and core partners, have done a good job of adapting to that changing environment and to their own evolving understanding of what needs to be done, and what else might contribute to a good outcome, for the UK, for the Celtic Sea as a whole, and for Cornwall.

2.68 And no significant qualifications are needed to either of those statements; this is a job well done.

3. Progress against targets

Note that this is necessarily an interim section based on the project's Quarter 1 report for 2023. We will update it when the final data is available.

Spend against budget

3.1 The project has submitted two Project Change Requests, both of which were approved, though only one was activated in the end (the project decided not to take the additional money in the end as there was insufficient time to be sure to get it spent). We consequently base the section which follows on the figures agreed through that approved PCR.

3.2 At the end of Quarter 1 2023 the project had spent £735,453 against a profile of £780,275 – an underspend of £44,822. The team is currently projecting a likely final underspend of some £40,000 – a very modest proportion of the total grant and one which would be a good result in a fast-moving field like this.

3.3 The project began late in the middle of 2021 and has therefore always carried a salary underspend, sensibly using it to re-purpose expenditure in line with developing requirements, for example to recruit four project officers undertaking applied research.

Achievement against target

3.4 The project had exceeded two of its four formal targets before the end of Quarter 1 2023 (C26 Enterprises cooperating with research institutes, and C5 New enterprises supported). It was behind on the third target (C1 Enterprises receiving support), and had only one confirmed for the fourth (C29 Enterprises supported to introduce 'new to the firm' products). However, the project is confident that its current pipeline of activities, and recently completed works, will enable it to meet these targets.

Category		Target	Actual to date
C1	Enterprises receiving support ("business assist")	59	34
C26	Enterprises cooperating with research institutes	24	27
C5	New enterprise supported	3	7
C29	Enterprises supported to introduce 'new to the firm' products	8	1

source: Quarterly Project Progress Report for Q1, 2023, Celtic Sea Power

3.5 Targets are a necessary part of the ERDF process, but it is seldom possible to construct them so that all point unambiguously and wholly helpfully to the ultimate aim of any project. It is to the credit of all those involved in this case that the chosen targets focus carefully on what should be achievable during the lifetime of the project. And it is very encouraging to see that in meeting its obligations the project has been able to concentrate on building capability for the long-term, as explained in this note in the latest quarterly return:

> A greater appetite for more meaningful collaboration with the Research Organisations involved in the project continues. Many of our C1's (business supports) to date have been pre-cursors to such collaboration (C26's) and we see this trend continuing. In essence, we believe that we will convert more of the 59 C1's to C26's than previously forecast and this quarter has continued to prove this hypothesis. As a team, we are very keen to ensure that we retain a focus on these meaningful, long-term collaborations which are helping to develop a genuine regional industrial response to the FLOW market opportunity at a very crucial time.

3.6 As one of the partners put it, the legacy of a project like this is really important and will not be found in any number of "twelve-hour business assists".

3.7 The project has so far achieved some 58% of Target C1 Enterprises receiving support (commonly known as "business assists") and the team have plans to secure many more before the end of June. In its latest quarterly return the project comments:

> A key focus for Q2 2023 will be on C1 output completion with already signed up companies plus the pursuit of 7 new companies.

3.8 It is a little early to be sure whether or not this target will be achieved in full; however the project is confident that it will be achieved by the end of the period.

3.9 It was interesting to hear from project partners used to ERDF processes that for the first time they have been getting some pushback from a handful of companies which though keen to work with Celtic Sea Power are not keen to accept the strings that come with making a formal commitment. The project therefore cannot count these companies' involvement towards agreed targets, but sensibly continues to work with them.

3.10 The final target, C29 Enterprises supported to introduce 'new to the firm' products, was a long way from achievement at the end of Q1 2023. With hindsight 'new to the firm' products are more likely to be developed once the main contracts have been let and the development of the Celtic Sea becomes a certainty. Despite this, the project is confident it will close this gap by the end of the period

4. Business feedback

4.1 BiGGAR Economics consulted with 13 companies and organisations who had engaged with the project to understand the impacts that this engagement has had and how the Cornwall FLOW Accelerator is perceived by the industry.

Motivation to engage

4.2 Companies were motivated to engage with the project for two main reasons. Either they were motivated to gain access to the supply chain eco-system in Cornwall, or they wanted to use the expertise that was available through the project to solve specific challenges.

4.3 The Cornwall FLOW Accelerator and the individuals involved in it are considered to be extremely well connected to and a fundamental part of the floating offshore wind sector in the South West of England. Organisations, particularly those who were new to the area were motivated to engage with the project to gain access to this ecosystem.

> Renewables is the industry of recommendations.

4.4 The objectives that organisations wished to pursue by accessing the supply chain and development eco-system in Cornwall included:

- Business Development: Companies with innovative products and services, or who were looking to diversify from other markets into the floating offshore wind sector were motivated to engage to showcase their products to potential buyers and establish direct connections with businesses. They saw engagement with the project as an opportunity for networking and gaining exposure to potential developers or primary contractors.
- Supply Chain Development: Offshore wind developers were interested in using the networking and direct contact opportunities offered by the project to understand the local supply chain and the goods and services they could potentially procure from Cornwall. They were aware that the information they had on potential suppliers in the area was limited and that the events and discussions hosted by the project would introduce them to companies they would be unlikely to find on their own.
- Collaboration and Stakeholder Engagement: Some industry participants were motivated by the collaborative ethos of the supply chain eco-system in Cornwall and wanted to use the project to get involved with this collaboration. This included collaboration in areas such as fisheries and stakeholder management.

4.5 Industry consultees were also motivated to engage with the project to address specific technical and research challenges related to their product or development. The project was considered to be a gateway to relevant research and academic facilities that could support the sector, as well as highly knowledgeable people within Celtic Sea Power. Accessing the research and knowledge base motivated those who wished to benefit from:

- Simulator: The simulator at Plymouth University was mentioned by multiple consultees as an attractive asset that they felt could add value to their company. This included using the simulator to try out different turbine layout options for a floating offshore wind project or demonstrating the potential environmental impacts of a new product. The simulator was considered to be a robust tool that could speed up the design and accreditation process.

- Expert advice: The expert advice that was available through the project was considered to be an attractive resource for addressing specific challenges within projects or products. Innovative and new organisations in particular were motivated to use this advice as it aligned with the knowledge gaps within their own companies.

- Academic Research Projects: Industry respondents were also interested in using the project to gain access to academic expertise within the partner universities, to run small-scale research projects to address specific challenges and create unique selling points (USP) for products.

Alternatives?

4.6 The industry consultees highlighted that there was no other organisation providing a similar service to the project and therefore the activities that they did with the project would either not have happened, would have happened at a later date or on a smaller scale.

4.7 Supply chain companies that were motivated to use the project to gain introductions and access to developers and primary contractors would have pursued alternative marketing and business development options. This would include attending more trade shows and conferences across the UK, the EU and globally. The implication would have been increased time and resource expenditure as they would need to travel extensively to access opportunities that were already available locally.

4.8 Developers who engaged with the projects to gain an understanding of the supply chain would have likely organised their own meet-the-buyer events in Cornwall, but this would not have occurred until leases were secured from The Crown Estate and the projects were developed further. This would likely have been many years later. The later engagement with supply chain companies would give these companies less time to prepare for the specific opportunities that these developments could bring and as a result, the value of contracts that could be secured in Cornwall would likely be lower.

4.9 Similarly, those who engaged with the project to address specific research or consultancy needs would have reduced the amount of R&D that was occurring in these companies. Without the introductions to academic specialists, companies reported that they would have been unlikely to commission specific research that could support the development of their product, or if they did it would have been after significant time was spent identifying the correct expertise. This would result in less developed bids being submitted as part of the Celtic Sea Leasing round and a less competitive supply chain in Cornwall, as R&D and innovation are crucial in emerging industries such as floating offshore wind.

4.10 The data sharing would not have happened without the platform and encouragement that was provided by the project. Therefore, in the future developers would have repeated the same surveys and allocated their resources less efficiently.

4.11 Overall, companies would have engaged less with the opportunities that are available in Cornwall. This engagement would have required more time and money and as a result, companies would have reduced the level of activity in this area or delayed it by years, or both. All of this would have reduced the competitiveness of the sector in Cornwall and the potential economic benefit that it could gain from the development of the floating offshore wind opportunities in the Celtic Sea.

Outcomes to date

4.12 The Accelerator has moved the industry forward, at a faster pace of development than would have occurred otherwise. To date, the outcomes of the engagement with industry are operational, rather than economic. Companies are further along the development path than they would otherwise have been, but this has not resulted in a significant level of new contracts, growth or economic activity.

4.13 This is because the majority of the economic opportunities that the project is supporting will occur when the economic activity associated with the Celtic Sea Leasing Round is realised. At the time of the evaluation the Celtic Sea Leasing Round had not opened and the evaluation criteria for bids was not published. The economic activity associated with this leasing round will increase significantly when successful bidders are announced and will increase further during the construction and maintenance phases of these offshore wind farms. These are the opportunities that most of the supply chain companies are targeting and this is when the economic impacts of the project will be realised.

4.14 Companies that have engaged with the project have opened offices in Cornwall. However, the vast majority of these are not actively staffed and instead are used as hot desking or meeting spaces for when staff members are in Cornwall. The majority of the consultees that participated in the evaluation were based outside of Cornwall.

4.15 One respondent has established a presence and office in Cornwall with three members of staff based there. It was shown some potential locations when discussing investing in the UK with the UK Government's Department for International Trade. These locations were Cornwall and Scotland. The supply chain ecosystem and its activities were one of the factors that contributed to the decision to be based in Cornwall, along with greater availability of space and the weather.

4.16 Many of the companies that have engaged with others in the eco-system or have accessed expertise are using these connections and knowledge to move their companies forward. This includes:

- Follow-up Discussions with Developers: Supply chain companies have had follow-on discussions with developers/purchasers, building on introductions made and relationships built through the project. This is giving the companies in Cornwall a greater insight into what will be required when contracts are procured and how they can add value, be competitive and secure economic benefit from the development of the Celtic Sea floating offshore wind opportunity.
- Use of Research for Business Development: Supply chain companies that have commissioned research, particularly those associated with the environmental impact of their products, are using this research to engage with potential customers and highlight the comparative benefits of their products.
- Ongoing Research and Development: The R&D that has been completed as part of the project has stimulated further research in the industry. Some of this is occurring in-house, however, companies that have engaged with the universities are continuing these relationships and planning to commission further research in the future.
- Collation of Supply Chain Databases – the developers have used their engagements through the project to map and record potential suppliers in Cornwall. This has included inviting companies to join procurement frameworks so that they are made aware of opportunities in the future when these arise.

Expected future outcomes

4.17 The economic benefits from the Cornwall FLOW Accelerator will be realised in the years ahead when the floating offshore wind projects in the Celtic Sea move from being concepts to detailed proposals and then on to operational facilities.

4.18 The works that are currently being completed by the project are expected to increase the share of future contracts from the Celtic Sea Leasing Round projects that could be secured within Cornwall.

4.19 Connections fostered now will result in contracts in the future. The objective of many of the organisations that engaged with the project was to gain access to the eco-system of supply chain companies and developers. The relationships that have been established as a result will increase the probability of companies in Cornwall being awarded contracts from floating offshore wind developers in the Celtic Sea. The supply chain companies will have a greater understanding of the requirements of developers, or Tier 1 contractors, as a result of these engagements. Developers have used the opportunity to collate local supply chain databases, which highlight the capacity of companies in the area and enable them to invite appropriate companies to tender for opportunities.

4.20 Research and development will make Cornish companies more competitive. The floating offshore wind sector is aiming to achieve significant cost reductions in coming decades, to bring the overall cost of energy from floating turbines in line with the fixed offshore wind sector. Achieving this will require companies to innovate. Companies that can demonstrate their innovations can save time or money and will be attractive to developers and others. The project is encouraging local companies to undertake R&D and the facilities, such as the Dynamic Positioning Simulator at Plymouth University, allow these companies to demonstrate the benefits of these innovations.

4.21 The R&D that is being supported through the project will also support the wider floating offshore wind sector through the reduction in insurance premiums for innovative products and the reduction in the level of duplication.

4.22 All companies that participated in the consultation exercise expected to see a growth in headcount in future years, as the Celtic Sea opportunity develops. On average, those who reported expected headcount growth expected to increase their direct employment by 34. While this is speculative at this stage, and the project is one of the many potential contributing factors to this employment growth, this does highlight the potential scale of economic ambition of the companies that are engaging with the project.

Strengths

4.23 The respondents were asked what they considered to be the greatest strength of the Cornwall FLOW Accelerator, that supported it to achieve its objectives.

4.24 The personal knowledge, experience and connections of the individuals involved in the project were considered to be the greatest strength by the majority of respondents. Consultees were confident that if they approached the Accelerator with a query or request, the project team would be able to answer the question or would know who would be able to support them. This has generated a high level of respect for the team.

4.25 This expertise within the team has created a default, one-stop shop for floating offshore wind sector support. It allows the project to be:

- a catalyst for collaboration by bringing together people who can support each other through complementary interests;
- an industry champion with a strong understanding of the needs and capabilities of the local supply chain and how this relates to the opportunities that will be presented by the wider sector; and
- a proactive and cost-effective organisation through its understanding of the wider context and how these relate to the current capabilities within Cornwall.

Weaknesses

4.26 We asked consultees if there were any weaknesses within the approach by the project that would hinder its ability to achieve its objectives and what could be done to maximise its positive impact. The majority of respondents were not able to identify any weaknesses with the approach that was taken by the Cornwall FLOW Accelerator and considered most of the challenges to achieving its objectives to be external. However, some opportunities to enhance the scope and impact of the project were discussed by respondents.

4.27 The issue that was raised most frequently was the potential success of the Accelerator had been reduced because of the lack of clarity from The Crown Estate on the Celtic Sea Leasing Round for the entirety of the project's operational lifetime. In particular, the lack of clarity on the exact geographic areas of search that would be included in the leasing round has reduced the effectiveness and value of the environmental data-sharing exercise. Similarly, the lack of clarity on the approach to non-financial elements of the leasing round, such as environmental impacts or local content, has reduced the ability of the project to target areas that could support the Cornish supply chain to meet these requirements. Organisations that have to prioritise national or global R&D activities have directed this resource elsewhere because of the lack of clarity on the Celtic Sea Leasing Round.

4.28 Some respondents expressed that the complexity of FLOW's organisational structure can be confusing, making it difficult to understand who they are talking to and in what capacity. The involvement of multiple organisations within FLOW was cited as a potential challenge, requiring the creation of a whiteboard to map out the different entities. However, it is worth noting that the number of respondents highlighting this weakness was relatively small.

4.29 The issue of the focus on Cornwall as being a limiting factor was also identified by respondents. It was suggested that the project could be perceived as too focused on supporting Cornwall rather than supporting the UK as a whole. However, this was generally considered to be an opportunity waiting to be realised rather than a hindrance to achieving its objectives. There could be a greater focus on how the lessons learned from the Celtic Sea and the CFA could be applied at a national level, or to other clusters in the UK rather than focusing purely on Cornwall. In particular, the lessons learned from the data-sharing programme and the fostering of a collaborative approach could bring benefits to other parts of the UK.

4.30 The opportunities to collaborate with and commission research through the partner universities were considered to be a useful prospect for the majority of the industry consultees. The capabilities within the partner academic institutions were considered to be potentially under-utilised by the wider UK offshore wind sector. In particular, the Dynamic Positioning Simulator at Plymouth University was considered to be a world-leading asset that could have a much wider impact through a greater level of commercialisation. However, the structure of the research projects, such as the requirement for the inclusion of postgraduate students in the process, was identified by one respondent as being a constraint to fully achieving the objectives of their research project.

Company benefits

4.31 Each organisation stated that they had benefited from their engagement with the project. The outcomes that these organisations achieved as a result of this engagement aligned with their initial objectives for engaging. The respondents were asked what the primary benefit to their organisation had been as a result of their engagement with the Cornwall FLOW Accelerator. Three main themes emerged from the responses to this question. The primary benefits to individual companies were either:

- enhanced networking and connections;
- time and effort savings; or
- research-specific outcomes.

4.32 The enhanced networking opportunities and the ability to connect with individuals and organisations were considered to be the primary benefit for the greatest number of respondents. By providing companies with direct introductions to potential customers and collaborators, the project has enhanced the resilience of the supply chain eco-system in Cornwall and provided new and innovative companies with the opportunity to build relationships and enter new supply chains. Developers were perceived as being risk averse by some respondents due to the scale of the floating offshore wind projects and the issues around insurance for a developing industry. Therefore, the ability to build direct relationships was considered to be a valuable way to build trust in innovative products or services.

4.33 Similarly, developers considered the introductions to, and increased awareness of, potential supply chain companies in Cornwall to be the greatest single benefit as a result of their interactions.

4.34 Respondents who would have tried other approaches to achieving their intended objectives, either in networking or project-specific research, considered the time and effort savings to be the greatest benefit to their companies. The ability of the project to quickly identify useful connections or host events that attracted the right people was considered to be hugely beneficial for these organisations. Without this, these organisations would have spent resources on trying to achieve the same results and would likely have achieved poorer outcomes. As a result of the project, this resource could be applied to other productive areas of the organisation.

4.35 Organisations that had engaged with specific research projects stated that the knowledge and confidence that they received was the greatest single benefit from their engagements. This ranged from the increased understanding of seal behaviours, and the opportunities to use this information to support marine life through floating offshore wind developments, to using the research on the environmental benefits of a particular product to create a unique selling point for that product.

Sector benefits

4.36 Respondents were also asked what they perceived the greatest single benefit would be to the wider sector as a whole from the activities of the Cornwall FLOW Accelerator. Responses to this question highlighted two main themes:

- efficiency and collaboration; and
- sector preparedness and profile.

4.37 The efficiencies that can come from the collaborative approach fostered by the project were considered to be the greatest potential benefit to the sector as a whole. The data sharing programme, whereby developers shared environmental information, was expected to save time and money during the development stage of the Celtic Sea Leasing Round. This could help these projects come online quicker and at a reduced cost. This was considered to be a benefit for the UK market as a whole and not just those companies in Cornwall. There was interest in learning lessons from the approach taken in Cornwall to apply this approach to other offshore wind clusters in the UK.

4.38 Respondents stated that the project will make the whole supply chain ecosystem in Cornwall better prepared for the opportunities that lie ahead. This is supported by the rise in the profile that the project has given the area and the companies within it. In particular, the support it has provided to raise the profile of the Celtic Sea Cluster workstream within OWIC has helped to attract national attention to the area. This is highlighted by the increased and growing national interest in events such as the Celtic Sea FLOW summit. Potential supply chain companies in the area are more aware of the opportunities that the floating offshore wind sector will generate demand for and the requirements that will need to be met to supply to this market.

Economic Impacts

4.39 To date, no consultees were able to highlight jobs, Gross Value Added or an investment that had occurred as a direct result of their engagement with the Accelerator. However, this is not a surprising finding, given the short timelines the of evaluation period and the type of support that was provided.

4.40 The organisations that engaged with the project to gain access to the networking opportunities have made important connections that could led to contracts being awarded in the future. However, the vast majority of these contracts will not be awarded until the floating offshore wind projects in the Celtic Sea are defined, developed, constructed and operated. The objective of these organisations was to use the connections made through the Accelerator to prepare them for these opportunities, so they have a better chance of being awarded contracts when the opportunities arise.

4.41 The organisations that engaged with the project to solve particular challenges through research and consultancy are working on long lead times for those projects. There is typically a lag between R&D activities and increased economic activity and for large infrastructure projects such as floating wind in the Celtic Sea, these time lags are greater than most. However, as with those companies that wished to access the networking opportunities, the R&D activities that have been supported by the Accelerator were designed to achieve greater economic activity in the future. This includes supporting project feasibility through reduced insurance costs or design optimisation and giving suppliers a competitive edge through product innovation.

4.42 The benefits that the organisations received will support economic impacts in the future as the supply chain in Cornwall is in a better position to meet the needs of the floating offshore wind sector. These benefits can not be quantified at this stage, however, companies are expecting a significant increase in headcount in Cornwall when the floating offshore wind projects in the Celtic Sea reach the development and construction phases.

Conclusions

4.43 The industry consultees considered the Cornwall FLOW Accelerator to be a valuable asset to support the economic development opportunities associated with the floating wind opportunity in the Celtic Sea and beyond.

4.44 On the whole, industry organisations engaged with the project to either gain access to the supply chain eco-system or to address specific research challenges. These objectives were met by all consultees and the success of these engagements was attributed to the expertise, reputation and connections of the project team. If this support had not been there, the respondents would have not achieved these objectives at the same scale or in the same time frame. The benefits of this engagement will grow as the floating wind projects in the Celtic Sea become more defined and move into the construction and operational phases.

5. Legacy and Next Steps

5.1 It is a feature of short-life, externally-funded, projects that when they end the good they have done is at risk if insufficient attention has been paid to securing their legacy. A true assessment of what difference a project has made should therefore take that into account as far as it can.

What will happen after the project ends in June 2023?

5.2 The Cornwall FLOW Accelerator project is very clearly a step in a longer-term process, and a longer-term commitment by the core partners to realising the full benefits of floating offshore wind in the Celtic Sea. Work will unquestionably continue. Cornwall Council has guaranteed funding for the core team for the next three years and OREC, too, has secure core funding. The story is more complicated for the two university partners; their commitment is not in doubt, but their ability to resource everything they want to do is not yet certain. A major project bid is in hand to secure those resources but it is in the nature of competitive funding that the bid may not succeed. It will be a problem for the wider programme, not just for the two universities, if it does not.

5.3 Whatever happens there the Accelerator project has a very substantial legacy, including:

- a rich resource of data on the Celtic Sea
- a library of publications exploring different aspects of the opportunity in detail
- Plymouth University's DP simulator
- Exeter University's simulator
- working groups on the workforce and ports
- a core team with unrivalled knowledge and understanding of the Celtic Sea opportunity, underpinned by CSP's reputation for impartiality
- a myriad of contacts and connections which do not rely on central support (though that central support keeps the process going and the project's FLOW Summit in June will be another excellent opportunity to make and enhance connections).

5.4 For some other things - like the inclusion of non-financial goals in the next leasing round, the exact location of economic activity in time, and with it the full nature of the benefit to Cornwall - it is inevitably harder to be certain at this stage because decisions are in the hands of others. But the project never set out to achieve all that *within its lifetime*; the intention was to do whatever could be done at this stage to maximise the chances that floating offshore wind in the Celtic Sea would work out well for Cornwall – and the project has done that.

Next steps

5.5 It will not quite be “business as usual” because the resourcing mix will be different, but Celtic Sea Power’s work will continue once this project funding ends, and the team are clearly committed to making the transition as seamless as possible. As things stand everyone is waiting for The Crown Estate to launch the leasing round; once that starts, the wider Celtic Sea floating offshore wind project is into its next phase, and Celtic Sea Power will no doubt adapt its approach accordingly. The current dispersed funding landscape makes their joint working quite a bit trickier at a crucial time for making the most of the floating offshore wind opportunity.

6. Conclusions and Recommendations

6.1 Has the Cornwall FLOW Accelerator project worked? The core team is in no doubt:

> Absolutely; it's done what it says on the tin
>
> Where we're at is extraordinary
>
> We've delivered on expectations; everybody's saying that FLOW is an opportunity
>
> I think we've done a good job. The question is what happens next

6.2 We agree. The Cornwall Floating Offshore Wind Accelerator project has more than achieved what it set out to do with impressive clarity of ambition and quality of execution.

Recommendations

6.3 The story very much does not end here because although this project is about to close the bigger job of ensuring that floating offshore wind comes to the Celtic Sea, and that Cornwall benefits to the maximum from that, is far from done. We therefore draw on our findings to offer the following recommendations to emphasise two points:

- Recommendation 1: keep the team together. The quality of the core team and its unique collection of expertise on the Celtic Sea is central to the success of this project and to CSP's success, and it will be central to the success of the next phase, so its important to keep the team together. That includes working together to ensure that every partner has the resources they need to contribute to the full;

- Recommendation 2: once The Crown Estate has begun the formal leasing round CSP should take the opportunity to refine its approach for the next phase (when, for example, potential bidders will be very keen to listen still and understand capability in the supply chain, but are likely to be very coy about what they say), thinking through how its role should change, and how to communicate that refined role to those who need to know.

- Recommendation 3: be mindful of how lessons learned in Cornwall could be applicable to and benefit the wider UK offshore wind energy sector. The floating wind opportunity in the Celtic Sea does not operate in isolation and many of the companies, technologies, problems and solutions that form part of the Accelerator can also be found elsewhere in the UK. The Accelerator could enhance its impact by considering this when designing its programmes.

Appendix A: Glossary

CFA	Cornwall FLOW Accelerator
CSP	Celtic Sea Power
DP	Dynamic Positioning
EIA	Environmental Impact Assessment
FLOW	Floating Offshore Wind
LIDAR	Light Detection and Ranging
O&M	Operation and Maintenance
OREC	Offshore Renewable Energy Catapult
OWIC	Offshore Wind Industry Council
UoE	University of Exeter
UoP	University of Plymouth

Appendix B: List of those interviewed

Celtic Sea Power partners and staff:	
Celtic Sea Power	Matt Hodson, Neil Farrington, Phil Johnston, Julie Russell
Cornwall Council	Nicky Pooley
Offshore Renewable Energy Catapult	Simon Cheeseman, Julie Taylor
University of Exeter	Lars Johanning; Justin Olosundé
University of Plymouth	Deborah Greaves, Alex Whatley
Businesses and other stakeholders outside the partnership	
ARC Marine	Tom Birbeck
British Ports Association	Richard Ballantyne
Cornish Fish Producers Organisation	Chris Ranford
Cornwall Marine Network	Shaun Slaymaker
Cornwall Seal Group Research Trust	Sue Sayer
DP Energy (Gwynt Glas OWF)	Lee Watt
Falmouth Harbour	Miles Carden
Hayle Harbour	Peter Haddock
Hexicon	Ben King
Lisarb Energy	Peter Child
Marine-i	Lisa Beverley-Jones
Natural England	Alex Banks
ORM	Paul Fairhurst
Reflex Marine	Angela Harvey
Renewable UK / Offshore Wind Industry Council	Julie Shrimpton
The Crown Estate	Tim Stiven
Tower Group	Alex King
Uali	Ian Bogado
Vattenfall	Frank Elsworth
Zcom	Nick Meade

Appendix C: Team and Stakeholder interview questions

Cornwall FLOW Accelerator

Team and Stakeholder interview questions: Spring 2023

A. Project design

1. In the light of experience, is the design of the project right?
2. Is it tackling the right priorities?
3. Is it tackling them in the right way?
4. Does the original rationale round accelerating solutions to market failures still hold good?
5. Is the partnership working?
6. Do the management and governance structures work?
7. Are the targets realistic and achievable?
8. Is the project reaching the right companies?
9. Have there been other significant changes in the external environment relevant to the project since it was designed? If so, how has the project adapted to them?

B. Overall assessment

1. Is the project working so far?
2. Is it likely to achieve all its objectives?
    a. (If so) what's the key to success?
    b. (If not so positive) what's not working, and why?
    c. What should be done to get things back on track?
3. Is the project realising other, unplanned, benefits?
4. Are effective links being made with other initiatives and activity?
5. Will the project have done its job (broadly defined, ie not restricted to agreed targets) by the time it ends?
6. What will happen after the project ends this summer?

Appendix D: Business Questionnaire

T Cornwall FLOW Accelerator

Business and Industry Groups interview questions: Spring 2023

1. Company's objectives
    a. How much engagement do you have with the Accelerator?
    b. What type of engagement did you have?
    c. What was the rationale for taking part in the Accelerator programme?
    d. As a company, what were your intended objectives, outcomes, outputs?
    e. Structure of the interaction? Who sets it?
2. Performance
    a. Did the interaction meet your objectives?
    b. What were the outcomes of this interaction?
    c. To date? (Employment/Investment)
    d. Expected in the future?
3. Alternatives
    a. If the Cornwall FLOW Accelerator had not been there, what alternatives would you have considered?
    b. Would the research/collaboration have occurred at all?
4. Strengths and Weaknesses
    a. What are the strengths of the programme?
    b. What is the single biggest benefit of the Cornwall FLOW Accelerator?
        i. To the company
        ii. To the sector as a whole?
    c. Are there any areas where the Cornwall FLOW Accelerator could be improved?
    d. What could be done differently?