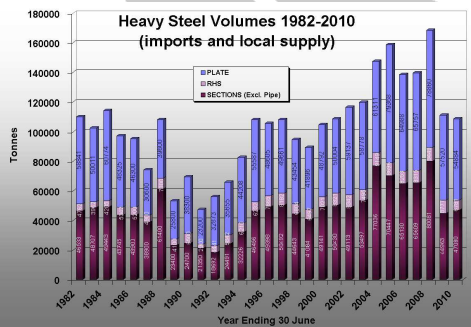


Industry in Need of a Roadmap

HERA
Innovation in Metals

Organic Growth = Capacity + Capability



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We are Different to Australia

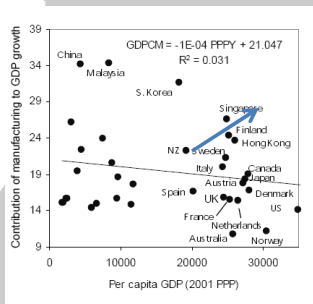
Percentage of GDP

	1978	2000	Change
New Zealand	22.3	19.7	-2.6
Australia	18.0	12.0	-5.9

Trends in Australian Manufacturing - Productivity Commission 2003

HERA - Innovation in Metals

Manufacturing Contribution to GDP Growth



Trends in Australian Manufacturing - Productivity Commission 2003

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NZ Manufacturing Activity

Elaborately Transformed Manufactures

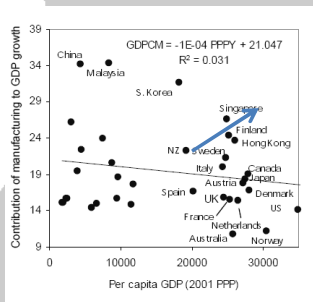
Heat Exchangers
Super Yachts
Desalination Plants
Drilling Rigs

Simply Transformed Manufactures

Structural Steel
Tank Fabrication
Farm Gates

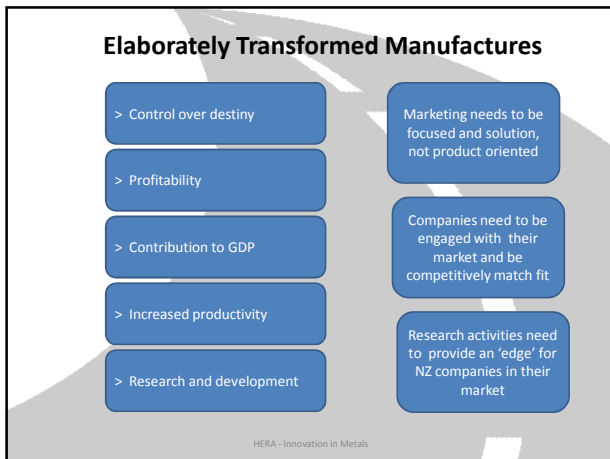
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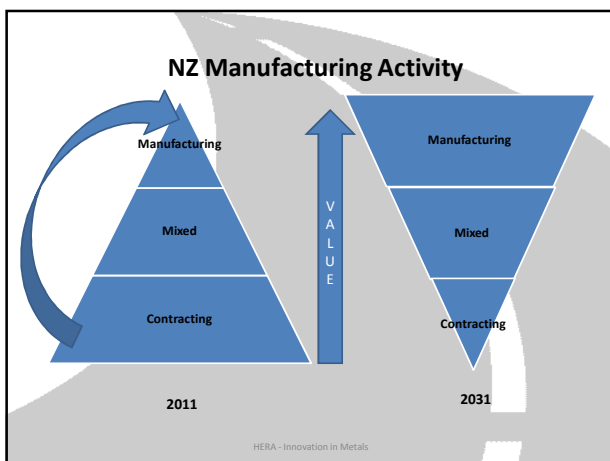
Manufacturing Contribution to GDP Growth

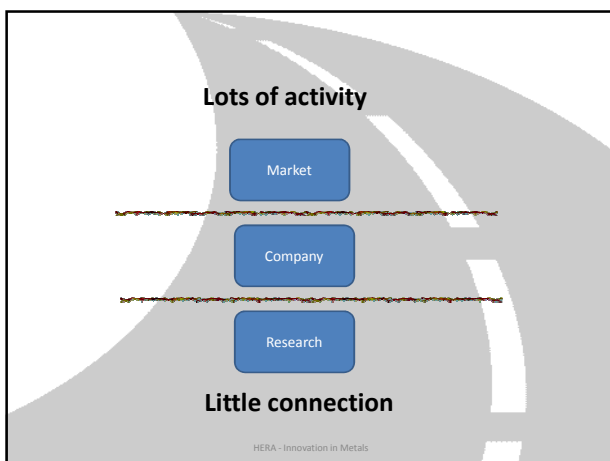


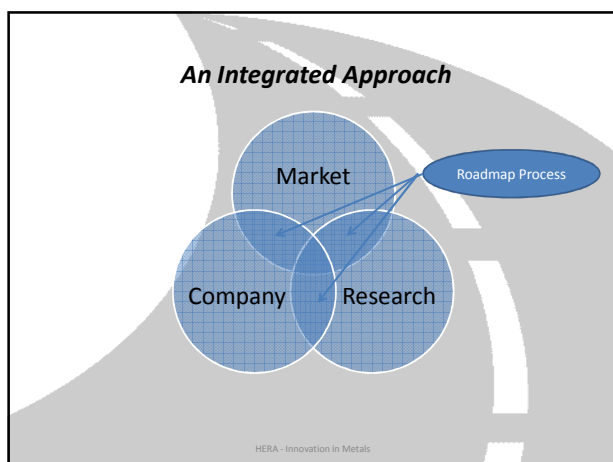
Trends in Australian Manufacturing - Productivity Commission 2003

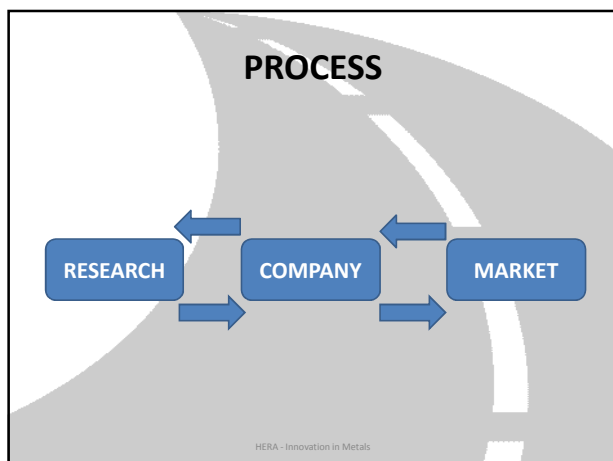
HERA - Innovation in Metals

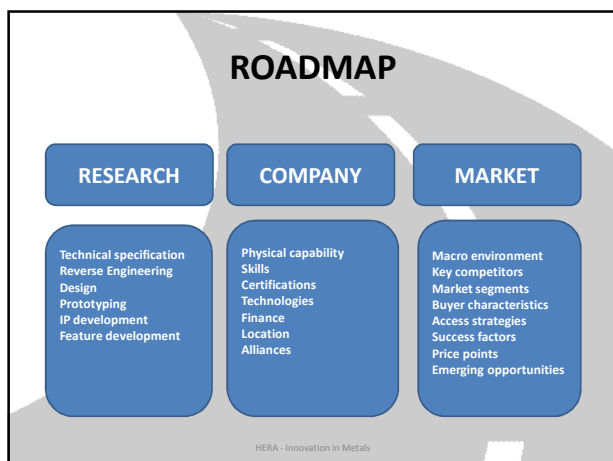


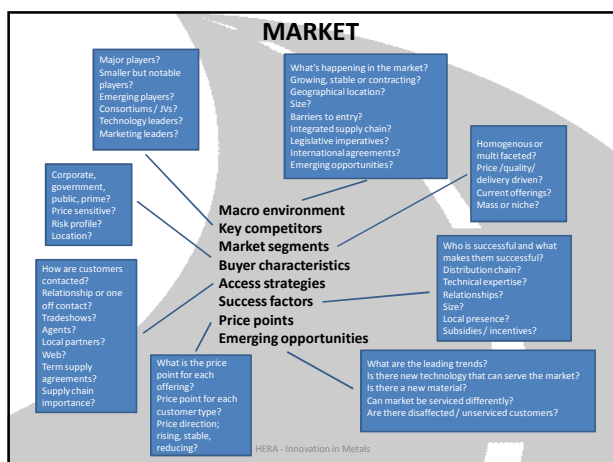


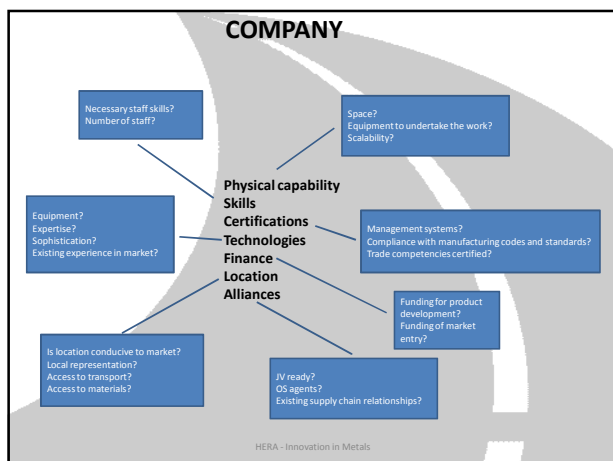


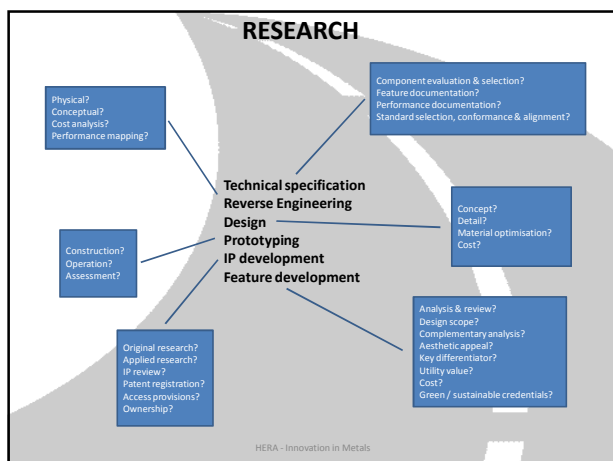




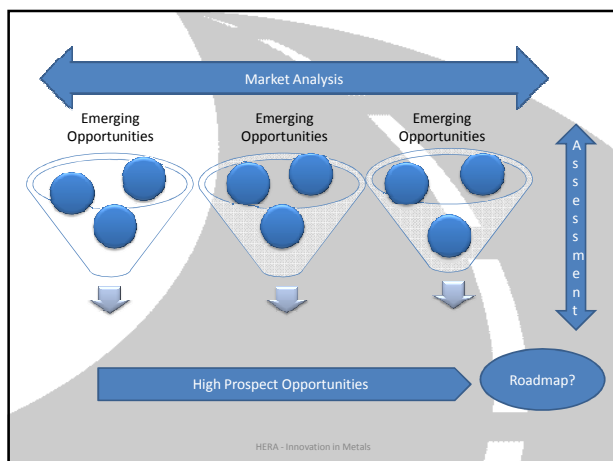


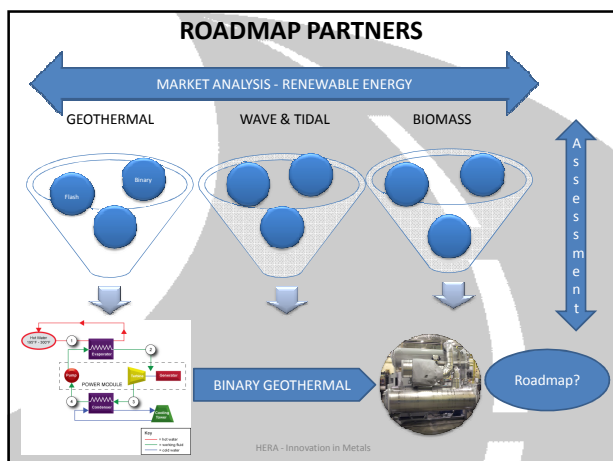




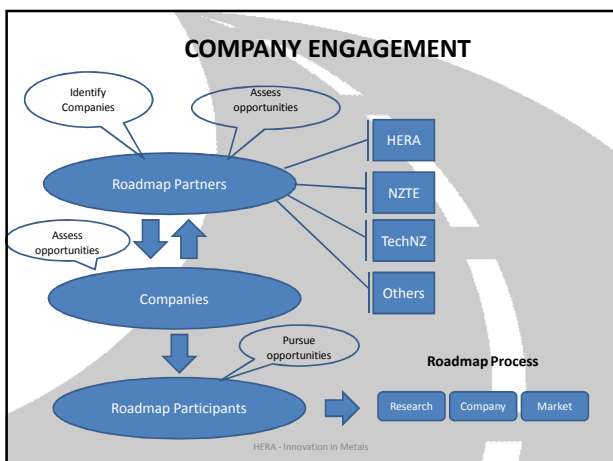












Industry Development Roadmap Process		
Inputs & Outputs		MARKET
	INPUTS	OUTPUTS
NZTE / ICN	Market reports •Sector •Segment •Product Competitor analysis Barriers to entry (tariff, non-tariff) Trade show intelligence & support Emerging trends reports	Market Overview Report Existing & Emerging opportunities Report Market opportunity analysis User needs analysis
Industry Associations & Agencies	Market Intelligence Emerging trends report International network access	Competitive analysis Market entry strategy
HERA	Process management	Process planning Process scorecard
Independent Market Research	Market reports •Sector •Segment •Product specific	Research report Market entry plan
Companies	Market intelligence Market experience Competitor intelligence	Research report Market entry plan

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Industry Development Roadmap Process
Inputs & Outputs

COMPANY

	INPUTS	OUTPUTS
HERA	Database - Segmentation •Competence •Interest •Experience •Product •Capability •Industry Specific Capability Register	Capability match report Capability gap analysis Capability development strategy Capability partner identification
ICN	Supplier identification Key contact identification	Supplier report Contact strategy
NZTE	Capability enhancement	
Companies	Process improvement Product development	Products

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Industry Development Roadmap Process
Inputs & Outputs

RESEARCH

	INPUTS	OUTPUTS
Universities & Research Bodies	Existing research Developing research Allied research New research	Existing technology assessment Existing Body of Knowledge Report Research (technology solution) report
Companies	Prototype development Product improvement	Prototype development Prototype testing and performance validation
HERA	Research activity coordination Research / company interface management Applied research Technical assessment of opportunities	Activity report Research report Assessment report

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