

DELIVERY PLAN FOR
THE HEART OF THE
SOUTH WEST
PRODUCTIVITY
STRATEGY

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Section One: Introduction

Our Productivity Strategy

The Heart of the South West is an area with enormous potential and a simple **ambition to double the size of the economy over 20 years**. The area is home to almost 1.8 million people and our economy is worth close to £35 million, making the Heart of the South West the size of a major UK city. The vision is for all parts of the area to become more prosperous and for people to have a better quality of life with higher living standards. Improving productivity is key to achieving that goal and our **Productivity Strategy** was agreed in March 2018, based on a [sound evidence base](#) to guide our collective actions for accelerating growth.

Our evidence and analysis means the Productivity Strategy is structured around three strategic themes of Business Leadership and Ideas; Housing Connectivity and Infrastructure; and, Employment Skills and Learning.

Spanning our **rural, coastal and urban areas** the Productivity Strategy also integrates cross cutting themes to ensure that we **capitalise on our distinctive assets, maximise the potential from digital technology, and deliver inclusive growth** for people and places.

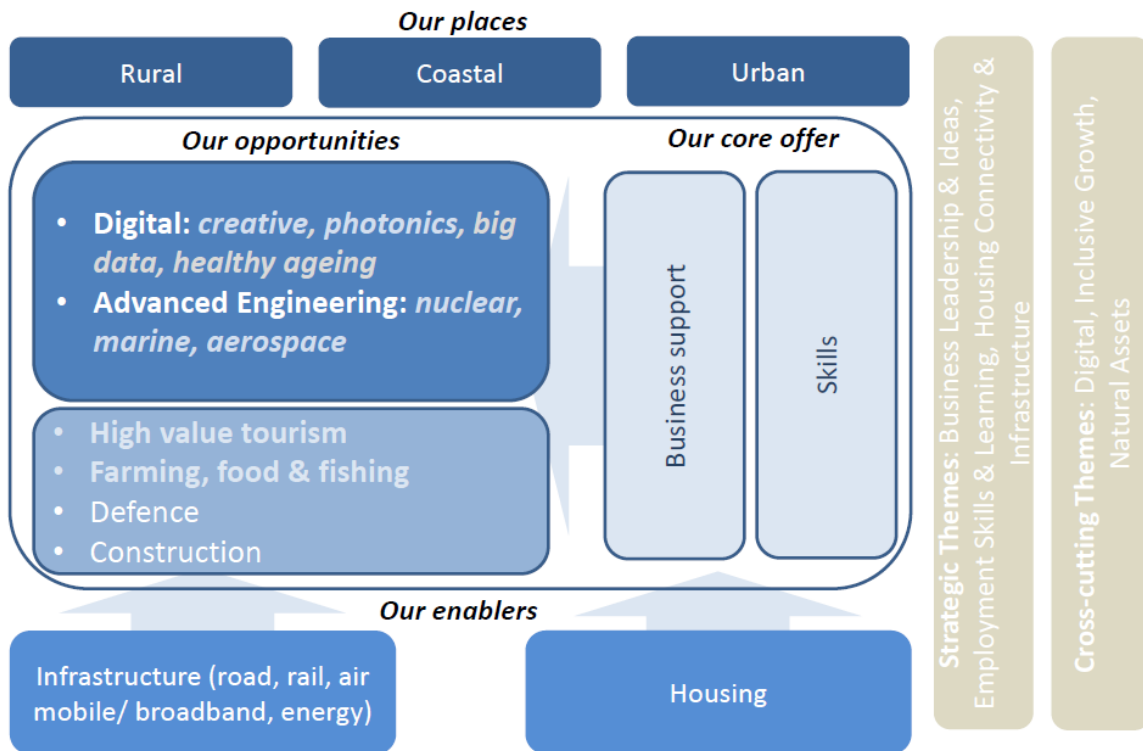


The Strategy also closely mirrors and supports the priorities identified in Government's Industrial Strategy, itself targeted at raising UK productivity levels.

A Focus on our Opportunities

The strategic issues identified in the evidence base and the Strategy are being addressed through a focus on a series of opportunities alongside a core offer for all places and businesses. Since developing the Productivity Strategy more work has been undertaken to better understand the potential of our **transformational and bedrock opportunities where we have clearly identified comparative advantages**. Transformational opportunities are those where there is a growing or new market emerging which has the potential to make a step change in productivity, bedrock opportunities are those which are already major parts of our economy where there is significant opportunity to increase productivity. Some of these opportunities cross regional boundaries and we have been working closely with partners in neighbouring areas to develop our ideas. Work to understand the opportunities is being taken forward by a series of Task and Finish Groups containing experts in the field from a range of public, private and social purpose organisations. This work is at different stages. The first wave of developed opportunities is shown in yellow overleaf with the others emerging across the autumn and spring.

Delivering Productivity Growth



Purpose of the Delivery Plan

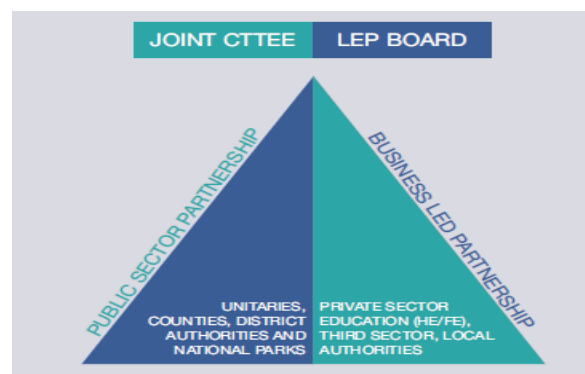
This Delivery Plan therefore sets out how the strategic challenges and opportunities of the area will be addressed and brought to life in a **common framework for action and delivery**.

It is being developed within an evolving context and **should be seen as a living document that will be regularly monitored and updated over time**. This Delivery Plan will be used as a basis for decision-making as we look to **optimise local resources and leverage external funding streams** to deliver the actions listed within this Plan. Heart of the SW has also been identified by Government as one of the first LEP areas to develop a Local Industrial Strategy. This will be developed in the coming months so the Delivery Plan will feed into this and be updated as a result.

Governance of the Plan

The document is owned by both the Joint Committee and the Local Enterprise Partnership.

The shared responsibility between all local authorities, the national parks and the business-led LEP means that we have a stronger commitment than ever before to set the strategy and deliver the priorities.



Monitoring the Plan

The monitoring and evaluation procedures for the HotSW Productivity Strategy and associated Delivery Plan include two separate components:

- Monitoring and analysing high-level economic trends relating to the key themes within the Productivity Strategy; and,
- Monitoring and evaluating the impact of Productivity Strategy interventions ‘on the ground.’

The first of these components provides vital intelligence relating to the sorts of economic outcomes the partnership wishes to help influence. It provides a basis for broad horizon scanning of the HotSW economy, which in turn will help to inform policy direction and target interventions where they are needed (e.g. where we have strengths or weaknesses). A full set of economic indicators has been developed in relation to this¹ alongside a high-level dashboard which incorporates the following:

Theme	Indicator
Economic Growth	Real GVA Growth
Productivity Growth	Real Productivity Growth
Increasing Prosperity	Typical (median) gross annual earnings (full-time)
Business, Leadership & Ideas	Net business births
Business, Leadership & Ideas	No. of business exporting as % of business stock
Employment, Skills & Learning	% workers in managerial, professional and technical/ scientific occupations (SOCs 1, 2 and 3)
Employment, Skills & Learning	% working-age population qualified at NVQ Level 4 and above
Housing, Connectivity & Infrastructure (+ Maximising the Potential from Digital Technology)	Superfast and ultrafast broadband coverage
Inclusive Growth for Our Communities and Places	JRF Inclusive Growth Monitor <ul style="list-style-type: none"> • Inclusion Score • Prosperity Score
Opportunity Sectors (+ Capitalising on Our Distinctive Assets and Maximising the Potential from Digital Technology)	Real GVA Growth for <ul style="list-style-type: none"> • Advanced Manufacturing and Engineering • Food & Drink • Digital Technologies • Creative Industries • Agritech Industries • Marine • Defence • Medical, Health & Life Sciences • Environmental Industries • Photonics and Electronics • Aerospace • Construction

However, this component does not provide the means with which to monitor the partnership’s performance, due to the myriad of other factors which shape these economic trends.

¹ See Heart of the South West Productivity Strategy Monitoring and Evaluation Considerations, January 2019

Therefore, in addition to the above, the partnership will commit (where possible and practicable) to effectively monitoring and evaluating the impact of programmes and projects 'on the ground.' In most cases project outputs (and KPIs) are already captured but, where possible, efforts will be made to robustly evaluate the real impacts of those outputs on key themes through the deployment of appropriate evaluation methodologies.

Structure of the Document

The remainder of the document is structured as follows:

- **Section Two – The Core Offer and Principles for Growth**
- **Section Three - Delivering the Key Opportunities**
- **Section Four – Monitoring**

Section Two: The Core Offer and Principles for Growth

Introduction

Higher productivity is characterised by businesses creating more wealth, higher value jobs and contributing to better living standards. To help achieve this, the Productivity Strategy identified three strategic themes with associated aims and programmes of activity which are shown below. Although the associated programmes have and will continue to evolve over time, the principle is for our 'core offer' to be available for all businesses and places. The transformational and bedrock opportunities draw on and enhance this core offer; it is the foundation of our delivery.

Business, Leadership and Ideas

Summary/Outcome	High Level Aims	Programmes
Our businesses are strong and amongst the most innovative and productive in their sector	<ul style="list-style-type: none"> Significantly improve the productivity of existing businesses in both urban and rural areas Capitalise on our competitive advantages and transformational (golden) opportunities Attract additional, high value, businesses Support and encourage a more equal distribution and take-up of opportunities 	<ul style="list-style-type: none"> Business innovation Management excellence Exports – new markets, new opportunities Accessible support to start up and grow Attracting business investment and Foreign Direct Investment

Housing Connectivity and Infrastructure

Summary/Outcome	High Level Aims	Programmes
Our businesses have the right physical environment to thrive, connectivity to markets and space to grow	<ul style="list-style-type: none"> Create vibrant places that are attractive to skilled people and new investment, with infrastructure to support productivity and inclusive growth 	<ul style="list-style-type: none"> Connectivity and resilience Housing and land for business Improving digital infrastructure and opportunities Clean energy infrastructure

Employment Skills and Learning

Summary/Outcome	High Level Aims	Programmes
Our businesses have a skilled workforce and are committed to training and developing talent to capitalise on future opportunities	<ul style="list-style-type: none"> Develop, attract and retain a highly skilled and adaptable workforce Enhance education, skills and learning opportunities to improve the economic potential of our workforce 	<ul style="list-style-type: none"> Educating and retaining the workforce of the future Creating pathways to success for all Skills for our golden opportunities Supporting our workforce

to succeed in a changing
economy

Core Offer: Business, Leadership & Ideas (BLI)

Core Approach

Business is at the heart of our region’s economy. It is business that creates the jobs for our people; it is business that creates wealth and opportunities; and it is business that provides the goods and services that markets need. To achieve sustainable growth, we need to work with business to grow faster, compete more successfully and to innovate constantly. It is business that can make practical changes to deliver an increase in productivity. Our aim is to create an enabling environment in which our businesses can thrive, good business practices can flourish, and opportunities are more equally distributed. It is acknowledged that increasing average productivity can be achieved by a blend of:

- Enabling our existing businesses (their workforce and capital) to be more productive
- Increasing investment in our competitive advantages
- Attracting additional businesses in higher-productivity industries

This helps to expand the overall business base and workforce with a higher balance of productive economic activities. We aim to do all three in a balanced way. We will seek to exploit our area’s identified golden opportunities. However, we acknowledge the value of our small businesses across the region and the supply chain across all sectors of the economy, and we will capitalise on our social enterprise presence to drive fairer and more inclusive business practices that benefit our residents and protect our natural capital. Our approach supports the following outcomes:

[BLI – P1] Business innovation that rivals some of the best areas in the UK

[BLI – P2] All businesses have access to comprehensive support to develop outstanding leadership

[BLI – P3] Increase the value of HotSW exports

[BLI – P4] One of the best places in the UK to start up and grow a business

[BLI – P5] One of the best places in the UK to locate and grow a business

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Support businesses to create and implement new ways of working and become more innovative	BLI - P1	Applicants for bids under ERDF	HotSW LEP, public sector and key industry and academic partners	ERDF secured 2018/19	ERDF projects have individual output targets. Please also see other opportunities	ERDF funded programmes Innovate2succeed and Local Manufacturing Advisory programme supporting all businesses. Additional interventions under individual opportunities	Depends on project – cross-regional, regional, HotSW Innovate2succeed transition only	All	Ideas	BLI	Digital

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Connect businesses with existing research and innovation capabilities	BLI - P1	Applicants for bids under ERDF	HotSW LEP, public sector and key industry and academic partners	See individual projects under opportunities	ERDF projects will have individual output targets. See individual projects under opportunities	This is partially being delivered through individual projects under opportunities but also through sector blind provision through the Innovate2succeed programme	Depends on project – cross-regional, regional, HotSW Innovate2succeed transition only	All	Ideas Business	BLI	Digital
Map and proactively support clusters and networks	BLI - P1	HotSW LEP, LAs	HotSW LEP, public sector and key industry and academic partners	HotSW LEP has secured funding for cluster support until March 2020	Number of clusters and networks supported	The LEP is supporting clusters through Nuclear coordinator and SCMC coordinator posts. LAs support individual clusters	Cross-regional	All	Ideas Business	BLI	Digital
Support capital investment to drive innovation	BLI - P1	Applicants for bids under ERDF and LGF, HotSW LEP	HotSW LEP, public sector and key industry and academic partners	Funding for projects has been secured through Growth Deal, ERFD and UGF	ERDF projects will have individual output targets. Employment space created	Growth Deal, UGF and ERDF have been available for capital projects that support innovation. Please see individual opportunities for projects	Depends on project – cross-regional, regional, HotSW	All	Ideas	BLI	Digital
Support social enterprises	BLI - P1 BLI - P2 BLI - P5	Applicants for bids under ERDF, HotSW LEP	HotSW LEP, public sector and key partners	Secured until 2020/21	ERDF projects will have individual output targets	Social Enterprise Support programme, funded through ERDF	HotSW	All	Business Places	BLI	Inclusive Growth
Business-to-business mentoring	BLI - P2	Business Mentors SW; Cornerstone	N/A - External	N/A - external	N/A	Business Mentors SW - volunteer mentoring scheme; Cornerstone - mentoring scheme in Somerset	HotSW/ Cornerstone Somerset only	All	Ideas Business	BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Export programme	BLI - P3 BLI - P4	Applicants for bids under ERDF	HotSW LEP, public sector and key partners	Funding secured 2018/19. Further ERDF call was published	ERDF projects will have individual output targets	ERDF funded Export for Growth programme Brexit support	HotSW	All	Business	BLI	Digital
Connect businesses to new markets	BLI - P3 BLI - P4	Applicants for bids under ERDF	HotSW LEP, public sector and key partners	Funding secured 2018/19. Further ERDF call was published	ERDF projects will have individual output targets	ERDF funded Local Manufacturing Advisory programme is supporting all businesses	HotSW	All	Business	BLILI	Digital
Growth Hub	BLI - P5	HotSW LEP (Service for All), DCC (ERDF Growth Support Prog)	HotSW LEP, public sector and key partners	Secured until 2019/2020	Number of businesses supported	BEIS and ERDF funded programmes. BEIS confirmed for 18/19 and 19/20. ERDF funded support will end Dec 2019. LEP funding secured until 2019/2020 Brexit support has been added	HotSW	All	Business	BLI	Inclusive Growth Digital
Start-up support	BLI - P5	Applicants for bids under ERDF, Govt, LEP	HotSW LEP, public sector and key partners	Funding secured 2018/19	ERDF projects will have individual output targets	ERDF funded Start-up & Grow programme for HotSW area. Start Up loans is a national Government funded programme. Growth Hub Service for all supports pre-starts	Cross-regional/ HotSW	All	Business	BLI	Inclusive Growth Digital
Market the region's special benefits and unique business opportunities to attract new investment	BLI - P6	HotSW LEP, Applicants for bids under ERDF	HotSW LEP, public sector and key partners	Funding for Inward Investment Manager secured. ERDF bid in progress	Increase in inward investment and FDI. ERDF projects will have individual output targets	LEP Inward Investment Manager is working with LAs to create a supportive environment and market the region	HotSW	All	Business Places	BLI	Inclusive Growth Digital

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Capital investment that enables growth	BLI - P6	Applicants for bids under ERDF and LGF, HotSW LEP	HotSW LEP, public sector and key partners	Funding for projects in existing programme has been secured	Employment space created; machinery Number of businesses supported ERDF projects will have individual output targets	Growth Deal, UGF and ERDF have been available to businesses and capital projects that support businesses but future funding is unclear	HotSW	All	Business Places	BLI	Digital
Access to finance: signposting and investor readiness	BLI - P5 BLI - P6	HotSW LEP, Applicants for bids under ERDF	HotSW LEP, public sector and key partners	Secured until 2020/21	Number of businesses supported ERDF projects will have individual output targets	Signposting and diagnostics are being delivered through the Growth Hub and Growth Support programme	HotSW	All	Business	BLI	Inclusive Growth Digital

Future Activity	Outcome	Lead	Key Partners	Funding status	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Support innovation in our local markets and become a test bed for innovation	BLI - P1	HotSW LEP	HotSW LEP, public sector, Innovate UK and key industry and academic partners	TBC	TBC	Explore how to become test bed for Grand Challenges Becoming a test bed for innovation in Healthy Ageing will be explored with key partners	Regional	All	Ideas Business Grand Challenges	BLI	Digital

Future Activity	Outcome	Lead	Key Partners	Funding status	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Business innovation	BLI - P1	Applicants HotSW LEP and Innovate UK	HotSW LEP, public sector and key industry and academic partners	TBC	Number of businesses introducing new products or services; Innovation space created.	A mix of programmes to support innovation through business support, innovation support for R&D, investments in capital infrastructure and supporting our clusters. We will include support for: <ul style="list-style-type: none"> - Grand Challenges - Businesses utilising innovation 	Cross-regional	All	Ideas Business Grand Challenges	BLI	Digital
Innovate UK MOU – action plan	BLI - P1	HotSW LEP and Innovate UK	HotSW LEP, public sector, Innovate UK and key industry and academic partners	Research funding confirmed, further funding TBC	TBC	Research is currently being carried out to determine blockages. Next steps will be to develop an action plan with Innovate UK to create more opportunities for HotSW businesses to benefit from Innovate UK support	Cross-regional	All	Ideas	BLI	Digital
Management excellence	BLI - P2	Applicants and HotSW LEP	HotSW LEP, public sector and key partners	TBC	TBC	Will be delivered through programmes under this theme and under Employment, Skills and Learning	HotSW	All	Ideas	BLI	Digital
Export programme	BLI - P3 BLI - P4	Applicants for bids under ERDF	HotSW LEP, public sector and key partners	ERDF call has closed. MHCLG leads on appraisals	ERDF projects will have individual output targets	ERDF call has closed now. MHCLG leads on the process. Update is expected in due course. Brexit support will need to be included	HotSW	All	Business	BLI	Digital
Connect businesses to new markets	BLI - P3 BLI - P4	Applicants for bids under ERDF	HotSW LEP, public sector and key partners	ERDF call has closed. MHCLG leads on appraisals	ERDF projects will have individual output targets	ERDF call has closed now. MHCLG leads on the process. Update is expected in due course.	HotSW	All	Business	BLI	Inclusive Growth Digital

Future Activity	Outcome	Lead	Key Partners	Funding status	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Growth Hub	BLI - P5	HotSW LEP and Applicants for bids under ERDF	HotSW LEP, public sector and key partners	ERDF, other funding	TBC	HotSW LEP is currently assessing options how to continue delivery of the Growth Hub service. Brexit and Business resilience (e.g. Brexit, cybersecurity) will be supported	HotSW	All	Business	BLI	Inclusive Growth Digital
Start-up support	BLI - P5	Applicants for bids under ERDF	HotSW LEP, public sector and key partners	ERDF, national funding	TBC	Current programme will finish soon. Options how to continue this programme are being assessed. Start Up loans is a national Government funded programme which is expected to continue	Cross-regional/ HotSW	All	Business	BLI	Inclusive Growth Digital
Business Intelligence, mapping & simplification task & finish group	BLI - P5	HotSW LEP	HotSW LEP, public sector and key partners	Mapping is part of GH deliverables. Funding for other activity unclear	TBC	There are currently over 74 business support schemes available in HotSW. Many schemes are only available for local areas. Establish a T&F group to map schemes and identify potential for synergies and simplification. We need to understand the current and future economic impact of our opportunities to inform our investment framework	HotSW	All	Business	BLI	Inclusive Growth Digital
Support to scale-up, grow and improve productivity	BLI - P5	HotSW LEP	HotSW LEP, public sector and key partners	Funding secured for 2019/20	Number of businesses supported	HotSW LEP is currently exploring options to commission a bespoke scale-up programme. Funding through LEP monies for 19/20	HotSW	All	Business	BLI	Digital Natural Assets
Market the region's special benefits and unique business opportunities to attract new investment	BLI - P6	HotSW LEP	HotSW LEP, public sector and key partners	ERDF, LEP funding for Inward Investment Manager	ERDF projects will have individual output targets	ERDF funding to support Inward Investment has been applied for. If successful, the project will support a Soft Landing package. Brexit support will need to be included	HotSW	All	Business Places	BLI	Digital Natural Assets

Future Activity	Outcome	Lead	Key Partners	Funding status	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Capital investment that enables growth	BLI - P6	HotSW LEP, Applicants for bids under ERDF and LGF	HotSW LEP, public sector and key partners	TBC	TBC	UGF and ERDF have been available to businesses and capital projects that support businesses but future funding is unclear. Growth Deal programme underspend will be made available through UGF. We will support business resilience (e.g. Brexit)	HotSW	All	Business Places	BLI	Inclusive Growth Digital
Create a supportive environment for all sizes of businesses	BLI - P6	Applicants HotSW LEP	HotSW LEP, public sector and key partners	TEC	TBC	We will develop and support interventions for all businesses. We will identify specific interventions for particular areas such as the Rural areas or High Growth Corridor. We will improve accessibility for rural businesses We will support business resilience (e.g. for addressing the Grand Challenges, Brexit), Digital utilisation and Manufacturing 4.0	HotSW	All	Business	BLI	Digital Inclusive Growth
Access to finance: signposting and investor readiness	BLI - P5 BLI - P6	Applicants HotSW LEP	HotSW LEP, public sector and key partners	TBC	TBC	HotSW LEP is currently exploring options how to deliver this	HotSW	All	Business	BLI	Digital Inclusive Growth

Core Offer: Housing, Connectivity and Infrastructure (HCI)

Core Approach

Businesses need the right physical environment in order to become more productive and competitive. The built environment, including housing is essential, alongside transport and communications systems and other infrastructure such as employment land and affordable energy (i.e. ensuring that solutions developed do not result in prohibitively costly energy for consumers). The HotSW region has a large and diverse physical and economic geography, including urban, rural and coastal areas, which presents both opportunities and challenges. Our cities and urban areas form a corridor that broadly tracks the A38/M5 and are keen to support rapid growth but require the right infrastructure to do so. Our rural and coastal areas also have a lot to offer and capitalising on their potential will be essential to boosting productivity. 'Place' is therefore crucial and our priorities will be delivered differently in different places, taking account of local needs and opportunities not all of which have been fully identified as yet. Our approach will align with government strategies such as the 25 year Environment Plan, Clean Growth Strategy, Housing White Paper, Homes England 5 year plan etc and will provide a vital link between national policy and local delivery. Our priorities will also reflect the requirements of our sectoral opportunities as well as one of our major assets - our natural capital – which can help increase productivity in a number of ways.

Our core approach therefore focuses on the following six outcomes which are designed to add value to the range of existing local delivery:

[HCI – P1] Strengthening the capacity and resilience of our transport links – delivered through the sub-national transport board

[HCI – P2] Improving our digital infrastructure

[HCI – P3] Facilitating appropriate housing – delivered through Local Plans and supported through the Housing Task Force

[HCI – P4] Facilitating appropriate land for businesses

[HCI – P5] Supporting the further development of our energy system infrastructure with a focus on clean energy

[HCI – P6] Safeguarding and augmenting our natural capital including consideration of flood risk prevention

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Deliver 25 Transport projects supported through Growth Deals 1-3	HCI – P1 HCI – P3 HCI – P4	Local Transport Board	Local Transport Authorities, Rail industry, Developers	£102m LGF Rounds 1-3, with £88m match	Over 21,000 jobs Over 19,000 housing units	In progress	HotSW	All	Infrastructure Places	HCI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Delivering Phase 1 of the Connecting Devon & Somerset Programme	HCI – P2	CDS Partnership	Local Authorities and delivery partner BT	£94m provided by Local and Central Government and BT	Superfast broadband access to around 298,900 residents and businesses across the CDS geography	Phase 1 now complete	Somerset, Devon, North Somerset, Torbay, Plymouth and Bath and North East Somerset	All	Business Infrastructure	HCI	Digital
Housing – developing a coherent approach to housing delivery across the HotSW area: accelerating delivery to support economic growth; ensuring vital infrastructure is in place; negotiating funding and freedoms to do more	HC1 – P3	Housing Task Force	Local Authorities, LEP, Homes England, Registered Landlords	Homes England, Local Authorities	Strategic approach to working with Homes England to accelerate house-building in key locations to support economic growth, and a productive relationship	<ul style="list-style-type: none"> Housing audit completed and conference held Housing task group established – Nov 2018 Direct reporting to the Joint Committee	HotSW	All	Places Infrastructure	HCI	Inclusive Growth
Employment land being delivered through Local Plans in addition to two Enterprise Zones spanning three areas - Oceansgate (Marine) in Plymouth; Gravity (Energy and Nuclear) in Somerset and Exeter and East Devon Growth Point (Environmental Futures) in Exeter/East Devon. Plus the Food Enterprise Zone	HCI – P4	PCC for Oceansgate Salamanca for Gravity EDDC for Exeter/East Devon	LEP, Local Authorities and industry	Several £m from many sources including Growth Deal, Growing Places, ERDF and Local Authorities	Increased floor space, attracting new businesses and enabling a greater share of rate income to be retained locally through pooling pilots and EZ infrastructure delivery plans to fund growth/ infrastructure	<ul style="list-style-type: none"> Oceansgate commenced in 2016 – Phase 2 construction March 2019 Gravity - site remediation started. CPO submitted Oct 2018 East of Exeter (4 sites) opened April 2017 FEZ – LDO approved 2018 	Sites across HotSW	All	Business Infrastructure Grand Challenges: Clean Growth and AI	HCI	Inclusive Growth Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Development of an Energy Strategy	HCI – P5	Joint activity between HotSW, C&IoS and Dorset LEP	C&IoS and Dorset LEPs	£100k from BEIS	Identification of opportunities from the transition to a low carbon economy (including from Hinkley Point C and EZs) and ways to overcome challenges and barriers	Due to report in January 2019	HotSW, C&IoS and Dorset	All	Grand Challenges: Clean Growth	HCI	Distinctive Assets
Development of Natural Capital Prospectus	HCI – P6	Local Nature Partnership	Devon Local Nature Partnership, Naturally Somerset, SWEEP, Plymouth LNP	Funded by Devon, Plymouth and Somerset LNP partners	Prospectus document produced	Draft document	HotSW	All	Places	HCI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Commission research to understand the area's functional economic zones and to develop key actions for supporting those zones. To include the identification of employment land	HCI – P1	LEP	TBC	To be identified	A clear and shared understanding of the spatial dimensions of productivity for our area and an action plan for delivery	Specification yet to be drawn up	HotSW	All	Places	HCI	Inclusive Growth Distinctive Assets
	HCI – P2										
	HCI – P3										
	HCI – P4										
	HCI – P5										
	HCI - P6										

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Local Transport Majors – North Devon Link Road and Forder Valley Link Road	HCI – P1 HCI - P3	Local Transport Authorities	Devon CC/ Plymouth CC, DfT	DfT Local Transport Majors budget, Developer contributions	Improved connectivity & reliability (North Devon Link) Unlocking Growth (Forder Valley)	Design principles determined, detail design under way (North Devon Link). Design completed and procurement in place (Forder Valley)	HotSW	Northern Devon (North Devon Link Road) Plymouth (Forder Valley)	Infrastructure Places	HCI	Inclusive Growth
Strategic Connectivity Improvements to reduce journey times, improve resilience and increase network capacity	HCI – P1	Sub-National Transport Board, Peninsula Rail Task Force	DfT, Highways England, Network Rail, Train Operators, LEPs and Local Transport Authorities	Highways England Roads Investment Strategy DfT Rail Enhancement budget DfT Rail Franchises	A303/A358 dualling Dawlish sea wall strengthening Additional passing loops on Waterloo to Exeter route for resilience and capacity Speed to the West rail enhancements A38 Others to be considered by the partnership are: rail access to Gravity; M5 NIC study; J23 improvements; M5 queue info; and, links to airports	Three sections being progressed in RIS 1, to be delivered during RIS2. Remaining sections of A303 dualling not yet programmed Option assessment and design development under way. No funding commitment yet for delivery Initial rail timetable study work completed. Next stage is outline business case Some initial feasibility work completed Next steps to be agreed for those under consideration	South West peninsula	A303/ A358 dualling will benefit whole HotSW area Dawlish works will support South Devon, Plymouth and Cornwall Waterloo to Exeter route will benefit much of HotSW area Speed to the West supports SW Peninsula	Infrastructure	HCI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop longer term strategic plans through the Sub-National Transport Board	HCI - P1	Sub-National Transport Board	DfT, Highways England, Rail industry, LEPs and Local Transport Authorities	DfT Transport budget	Identification of Strategic Priorities, particularly for Major Road Network (e.g. the A39/A361 improvements)	Board currently operating in shadow form	South West Peninsula	All	Infrastructure	HCI	Inclusive Growth
Sustainable transport strategies for key cities and towns	HCI – P1 HCI – P3 HCI – P4	Local Authorities	HotSW LEP National Infrastructure Commission	DfT Transforming Cities Fund	Sustainable Growth transport programme	Plymouth identified as DfT partner for Transforming Cities Fund Exeter identified by NIC for City development study	Plymouth sub region Greater Exeter area	Plymouth Exeter	Infrastructure Places	HCI	Inclusive Growth
Delivering Phase 2 of the Connecting Devon & Somerset Programme	HCI – P2	CDS Partnership	Local Authorities and delivery partners Gigaclear and Airband	£31m provided by Local and Central Government for Lots 1-6 - commercial contribution yet to be finalised National Park public funding total is £4.2m - commercial contribution £400k	52,000 premises due to benefit with Superfast broadband access through the Phase 2 programme. Build of the National Parks network is now complete and CDS are currently undertaking detailed assurance of the network	National parks coverage confirmed at 4,794 pending final assurance Lot 4, awarded to Airband, is in progress and on track Lots 1, 2,3,5 & 6 awarded to Gigaclear. There have been delays to parts of Phase 2. Gigaclear is currently submitting a remedial contract change request – review in Jan 2019	Somerset, Devon, North Somerset, Torbay, Plymouth and Bath and North East Somerset	All	Business Infrastructure	HCI	Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Facilitating appropriate future housing through Local Plans, supported through the Housing Task Force	HCI – P3	Local Authorities through the Task Force	Local Authorities, LEP, Homes England, Registered Landlords	Homes England, Local Authorities	Develop ‘transformational pilots’ working with areas of higher housing delivery, and explore a set of potential tools, and freedoms for use across the whole HotSW area	Further analysis of key ‘asks’ in each HotSW Housing Market Area. Work with Homes England to negotiate ‘transformational pilots’ (deals) in key growth areas. Develop a set of ‘tools’ and freedoms for use across HotSW to increase capacity and capability	HotSW	All	Places	HCI	Inclusive Growth
Support further development of the Enterprise Zones and the Food Enterprise Area	HCI – P4	Various Local Authorities	LEP, Local Authorities and industry	BEIS Defra Business rates retention Private finance/ load/ debt facilities Innovate UK?	All: extension of floorspace and knowledge transfer. Plus business rates relief extension and enhanced cap allowances East of Exeter – infrastructure improvements Oceasngate - funding to unlock phase 3	Gravity - progressing CPO and land acquisition, then road construction. East of Exeter - business case development Oceansgate - options being explored to fund phase 3	Sites across HotSW	All	Business Infrastructure Places	HCI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Support the development of Coastal Action Zones – utilising a portfolio of tools to address ‘stuck’ coastal places e.g. enhanced capital allowances, skills, infrastructure & business support	HCI – P2 HCI – P3 HCI – P4	TDA	LEP, other coastal districts	£10-£15m. Potentially through an enlarged Coastal Communities Fund, UKSPF and reduced borrowing rates for PWLB and other schemes	Economic growth Reduction in worklessness and deprivation Increased investment Increased wages	Business case development	HotSW	Coastal	Business People Places	HCI BLI ESL	Inclusive Growth
Implement Energy Strategy recs. Develop and maintain a “living” delivery plan to include governance arrangements, a database of energy projects, initiatives and proposals, working arrangements between the LEPs and relationship with the SW Energy Capacity Hub to increase the number, quality and scale of local energy projects	HCI – P5	Appointed Energy Lead in each LEP (subject to agreement to create these roles)	C&IoS and Dorset LEPs	LEP Public/private funding sources for energy projects and initiatives such as heat networks to be explored going forward	Delivery Plan Agreed governance structure Energy Lead LEP Board Energy Champion Energy Project Database (in conjunction with Hub)	Awaiting finalisation Energy Strategy report	HotSW, C&IoS and Dorset	All	Grand Challenges: Clean Growth	HCI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Natural capital strategy to be developed with options to be considered by the Place Group, potentially including the development of:</p> <ul style="list-style-type: none"> • An innovative and collaborative Investment Plan to develop natural capital solutions • A co-ordinated net gain approach • An investable collective climate change strategy • A Green Infrastructure Standard • The LEP 'project development and appraisal process' to include natural capital <p>Flood risk prevention also to be considered. Note: solutions may not all be natural capital based</p>	HCI – P6	LEP	LNP, LAs, universities, NGOs, land managers	Gov, LEP, LAs, investors etc – to be identified in the strategy	<p>Clear actions to ensure resilient natural capital assets and solutions</p> <p>A new financial model for achieving natural capital net gain through development</p> <p>Strategic approach and pilot initiatives to assist transition to a C neutral economy by 2050</p> <p>High quality green infrastructure achieved for communities and wildlife</p> <p>Revised project and appraisal process</p>	To be considered by the Place Group	HotSW	All	Places	HCI	Distinctive Assets

Core Offer: Employment, Skills and Learning (ESL)

Core Approach

People’s skills and experience underpin the success of an area. They are a central element in the creation of local prosperity; providing the labour that fuels successful business; the talent that drives forward enterprise and innovation; and the capacity that attracts investment and competition. Ensuring that the HotSW’s workforce and residents are therefore consistently supported to meet their full economic potential is imperative, allowing us to build on opportunities as they arise, as well as address challenges to sustainable growth and create a more inclusive economy.

The HotSW benefits from a strong starting position around skills and employment, with almost functional full employment, and a rapidly falling level of those experiencing wider worklessness. However, the area continues to face challenges around fulfilling the potential of those in work, and as a result the wider potential of its business community / core sectors. Too many of those in the workforce still hold a basic or lower level qualification; too few talented young people and adults stay in the area, seeking employment within the HotSW’s core industries; and too many of those that do struggle with challenges around aspiration or overcoming barriers that deny them access to higher value learning and work. This then has downstream challenges for business performance, community coherence, individual success, and overall economic dynamism. To support the wider ambitions of the Productivity Strategy therefore, the HotSW will focus upon a multilateral approach to overcoming these barriers and maximising the skills / learning potential of every one of our residents. Our core approach focuses upon six core elements:

[ESL – P1] Educating and Retaining the Workforce of the Future

[ESL – P2] Apprenticeships and Traineeships

[ESL – P3] Employability / Creating Pathways for All

[ESL – P4] Technical and Occupational Skills / Skills for Our Golden Opportunities

[ESL – P5] Supporting the Creation and Implementation of Higher Level Skills

[ESL – P6] Creating the Infrastructure for Future Learning

In bringing forward our ambitions around Employment, Skills and Learning, it is also understood that such interventions have a cross cutting role within individual sectors and priorities elsewhere in this document. As such, the programmes in this section should be read in conjunction with other areas, with as strong likelihood that the headline priorities set out with the core approach have benefits and synergies with people centric interventions across the balance of this strategy.

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Enterprise Advisor Network / CIAG / Education Business Partnerships	ESL – P1	Various (LEP, LA, FE, HEI, CEC, Private Sector)	Various (Schools, FE, HEI, LEP, Private Sector)	~£1m per annum from various sources	CIAG support for young people, including one to one advice and support, industry related learning and CIAG outcomes	Full programme of activity underway across area, though offer is variable dependent on location and school. Wider elements in development or early implementation, including EBPs	HotSW	All	People Places	ESL BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
European Social Fund – Support for NEETs and Young People	ESL – P1 ESL– P2	ESFA	FE, Private Providers	£1.1m over three years	Increase in the number of young people accessing further learning, engaging in employment or undertaking an apprenticeship	Two programmes underway, led by Careers South West and SERCO. Funding due to complete in Spring 2019	HotSW	All	People	ESL	Inclusive Growth
European Social Fund – Supporting Access to Employment	ESL – P3	DWP	FE, Private Providers	£600k over three years	Decrease in the number of individuals claiming out of work or other work-related benefits, either as they are accessing employment or in further education	Programme on-going, led by the Big Lottery, focused on working with those furthest from the labour market and young people	HotSW	All	People	ESL	Inclusive Growth
European Social Fund – Active Inclusion	ESL – P3	DWP	FE, Private Providers	£7.8m over three years	Decrease in the number of individuals claiming out of work or other work-related benefits (accessing employment or in further education)	Programme on-going, led by a mixture of private sector providers and FE partners	HotSW	All	People Places	ESL	Inclusive Growth
European Social Fund Support for the Workforce	ESL – P4 ESL – P2	ESFA	FE, HEI, Private Providers	£10.2m over three years	Increased number of individuals with higher level skills, specifically Level 3 and 4 across the workforce	Programme on-going, led by FE / HEI partners and Learn Direct. First round of contracts concluded in July 2018	HotSW	All	People	ESL BLI	Inclusive Growth
European Social Fund – Reinforcing the Capacity of Providers to respond to the Market	ESL – P4 ESL – P5	ESFA	FE, HEI	£1.1m over three years	Increased and higher quality provision of training and learning opportunities within core sectors	Programme on-going, led by a consortium of FE and HEI providers	HotSW	All	People Places	ESL	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
HotSW FE Capital Programme	ESL – P2 ESL – P4 ESL – P5 ESL – P6	LEP	FE	~£15m over three years	Enhanced facilities within the FE estate, deepening the curriculum offer across the HotSW	Programme close to completion, with 8 projects on-going with FE / HEI partners	HotSW	All	People Places	ESL	Inclusive Growth
Hinkley Point Training Agency	ESL – P4 ESL – P5	HPTA	LEP, FE, EDF Energy, Private Sector	£6.5m over two years	Increase in local labour and training opportunities linked to the development at Hinkley Point, including potential around backfill	Programme on-going, with intensive work in process with 5 HotSW colleges who have received core funding and Tier 1 Suppliers	HotSW and WoE	All	People	ESL BLI	Inclusive Growth
Apprenticeship Ambassador Network / Support for Apprenticeships	ESL – P2	NAS / AAS	LEP, FE, Schools, HEI, Private Sector	£100k	Increase in number of individuals taking up apprenticeships, in particular from hard to reach groups or at higher levels	Programme on-going, with NAS and AAS running network processes and events in year. Further emphasis to be put on apprenticeship roll out over next 12 months, following bedding down of levy	HotSW	All	People	ESL BLI	Inclusive Growth
Adult Education Budget	ESL – P3	FE, Training Providers, LAs	Community Groups, Health Partners	~£25m per annum	Increase in number of individuals holding basic skills and able to move forward into higher value education, learning or employment opportunities	In year provision on-going, with increased number of providers reporting smaller underspends and higher levels of delivery achievement than in previous years. Full review of base funding currently planned for 2019/20	HotSW	All	People	ESL	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
National Adult Retraining Pilots (Careers Learning Pilots / Flexible Learning Fund)	ESL – P3 ESL – P4	DfE, LAs, FE, Training Providers	Wider Training Providers, Private Sector	£4m in 2018/19	Increase in the number of in-work individuals progressing to a higher-level qualification, focus on Level 3 & 4	6 projects on-going across the HotSW, with progress being tracked and early evaluation activity on-going to feed into national adult retraining programme in 2021	HotSW	All	People	ESL	Inclusive Growth
T Level Pilots / FE Reform	ESL – P4 ESL – P5	DfE, FE	HEI, Private Sector	£500k in 2018/19	Increase in the number of individuals progressing to a higher-level technical discipline or qualification	First round of pilots currently concluding, with second round due to roll out in new year. 3 FE pilots in HotSW	HotSW	All	People	ESL	Inclusive Growth
Digital Skills Partnership	ESL – P2 ESL – P4 ESL – P5	DCMS, LEP	LAs, FE, HEI, Private Sector	£150k over two years	Increase in the quantum of digital skills and expertise across the economy, including at basic, technical and higher levels	Pilot formed in mid-2018, with staffing and delivery plan in place. Program complement and next steps on-going	HotSW	All	People Ideas Business	ESL BLI	Inclusive Growth Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
European Social Fund – Support for NEETs and Young People	ESL – P1 ESL – P2	Subject to Competition	Schools, FE, HEI, LAs	£4.7m over three years	Further support for CIAG provision across HotSW, including for those most at risk of becoming NEET	Call published in August 2018 with bids submitted in November. Awaiting outcome. Further calls to be considered in 2019	HotSW	All	People	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
European Social Fund – Active Inclusion	ESL – P3	Subject to Competition	DWP, FE, LAs, Community Groups	~£6.5m over three years	Community support to help residents access employment and undertake additional learning through grants	Opt in arrangements agreed for one further project in Dec 2018. Discussions on-going with Big Lottery about wider extension of activity to end of ESF programmes	HotSW	All	People	ESL	Inclusive Growth
European Social Fund Support for the Workforce	ESL – P4 ESL – P2	Subject to Competition	Private Sector, FE	£10m over three years	Increase in number of individuals holding a Level 3 and above qualification, with a focus on core sectors	Call published in August 2018 with bids submitted in November. Awaiting outcome. Further calls to be considered in 2019	HotSW	All	People Business	ESL BLI	Inclusive Growth Digital
European Social Fund Reinforcing the Capacity of Providers to respond to the Market	ESL – P4 ESL – P5	Subject to Competition	FE, HEI	~£1.4m over three years	Higher quality provision of training and learning s within key sectors, through improved resilience in FE and HE	Call published in August 2018 with bids submitted in November. Awaiting outcome. Further calls to be considered in 2019	HotSW	All	People	ESL	Inclusive Growth
Careers Hub / Enhanced Careers Information, Advice and Guidance Provision Aligning existing activity and rolling out a strengthened and comprehensive CIAG service	ESL – P1	LEP, CEC	Schools and other education providers, FE, HEI, Private Sector	~£500k per annum provided by CEC, LAs, LEP and other partners. Potential for SPF	Improved career and educational outcomes for young people within the HotSW, including increased take up of core sector opportunities	Delivery rolled out in late 2018 / early 2019with current intention to build offer over 3 years. Follows on from end of current ESF activity	HotSW	All	People	ESL	Inclusive Growth
Careers Advice and Guidance Ensure that Careers Advice and Guidance for adults is fully aligned with local opportunities, and fragmented provision is brought	ESL – P1 ESL – P2 ESL – P3	NCS, LEP	JCP / DWP, FE, LAs	~£3m over three years	Improved and better aligned advice and guidance for adults	Renewed contract for National Careers rolled out in September 2018. Opportunity to align existing in house and external provision	HotSW	All	People	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
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Adult Education Budget Further input into usage of Adult Education Budget / Adult Skills Funding, to better align activity with sectoral and local need, and tailor provision to better meet local conditions	ESL – P3	FE, LAs, Training Providers	Community Groups, Wider Training Providers	~£20m per annum core DfE funding, matched by learners and wider partners	Enhanced and refocused adult provision for those seeking employability and other basic skills, as well as community learning opportunities	Annual provision, with partners seeking an ability to influence the shape and type of provision commissioned. National policy on next steps on AEB currently awaited	HotSW	All	People	ESL	Inclusive Growth
Creation of a 'Skills for Business' Advisory Service, seeking to support business to better understand the skills landscape, assist with workforce development and enable new and added value roles	ESL – P2 ESL – P4 ESL – P5	LEP	LAs, Business Support Agencies, Private Sector, FE, HEI	£500k per annum. Potential for mix of SPF, LEP, LA and other match	Improved workforce planning and capacity across business community, leading to enhanced outcomes in terms of business output and productivity	Inception stage, with early discussion on-going about project scope and fit with Growth Hub and other business support products. Follows on from current ESF activity	HotSW	All	People Business	ESL BLI	Inclusive Growth
Institute of Technology Providing new provision of qualifications and content to strengthen the digital and advanced engineering sectors (incorporating Nuclear and Marine activity) within the area	ESL – P2 ESL – P4 ESL – P5 ESL – P6	LEP	FE, HEI, Private Sector	£26m over three years from FE Colleges, HEI partners and DfE	Increased learners at Level 4-6 and beyond, accessing a range of bespoke technical training opportunities to meet the needs of the digital and advanced engineering disciplines	Business Planning Stage 2 completed in November 2018, with interview process in Spring 2019	HotSW and C&IoS	All	People Places Business	ESL BLI	Inclusive Growth Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Technical Skills for the Workforce</p> <p>A new programme of supported activity within core sectors to assist with the delivery of improved outcomes and workforce development. Programme will seek to complement emerging IoT and T Level programme</p>	<p>ESL – P4</p> <p>ESL – P5</p>	LEP	FE, HEI, Training Providers, Private Sector	£4m per annum, with funding secured from SPF with LA, LEP, FE, HEI and Private Sector match	Increased learners undertaking technical level and higher-level qualifications within core sectors, with downstream impacts for business productivity and output	Inception Stage, with early discussions on-going on UK Shared Prosperity Fund and other potential funding streams. Will integrate with emerging thinking around National Adult Retraining Programme and Skills Advisory Panel agenda	HotSW	All	People Business	ESL BLI	Inclusive Growth Digital
<p>Apprenticeship and Traineeship Support Programme</p> <p>Seeking to support SME businesses to employ an apprentice, and support individuals to understand the benefits and potential of apprenticeship opportunities. Programme will place a renewed focus on higher level apprenticeship opportunities</p>	ESL – P2	LEP, NAS, FE	HEI, Private Sector, Training Providers	£3m per annum within funding to be secured from SPF, with match	Increased uptake of apprenticeships and traineeships as a route to employment and learning. Focus on higher level skills, key sector opportunities and technical occupations	Inception stage, with early discussions on-going on SPF and other potential funding streams. Follows on from current ESF activity with local partners awaiting next steps on Apprenticeship Levy and post EU funding	HotSW	All	People	ESL	Inclusive Growth Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Rolling Labour Market Intelligence Creating a programme of intelligence gathering to inform skills commissioning and wider activity. Drawing on the capacity of the IoT observatory & others	ESL – P1 ESL – P2 ESL – P4 ESL – P5	LEP, Private Sector	FE, HEI, Training Providers	£100k then £50k per annum. Funded by a mix of LA and other core funding	Enhanced labour market intelligence (LMI) to inform funding prioritisation and business planning / bidding processes	Seed corn funding for enhancement of LMI awarded to LEP in January 2019. Work on-going to scope study and agree next steps, integrating with the IoT Observatory approach	HotSW	All	People Business Places	ESL BLI	Inclusive Growth Digital
Skills Advisory Board Bringing together a representative sample of employers, providers and wider skills and learning stakeholders to inform commissioning and use of funding	ESL – P2 ESL – P4 ESL – P5 ESL – P6	LEP	Private Sector, LAs, FE, HEIs, Training Providers, Wider S/holders	£50k per annum, currently funded from within core LEP funding	Improved governance of skills and education decision-making and commissioning within the HotSW	National guidance published, with work on-going around next steps. To be established by Autumn 2019	HotSW	All	People Business	ESL BLI	Inclusive Growth Digital
FE Capital Renewal Programme, supporting the updated and renewal of core assets within the FE estate	ESL – P6	LEP	FE, HEI, Private Sector	£15m over 3 years, subject to future funding allocations	Enhanced provision within college facilities and improved site infrastructure for learners, leading to improved outcomes	Inception, with individual institutions beginning forward planning on stock / asset replacement. Awaiting Government's thinking on next steps around wider FE capital requirement	HotSW	All	People Infra-structure	ESL	Inclusive Growth
Strengthening Places / HEI Specialisation Funding, to support development of HE capacity/offer through new capital equipment facilities and revenue support	ESL – P5	HEI	FE, LEP, Private Sector, Training Providers, Schools	£10m over 3 yrs, with potential for further SPF & other core funding	Sector specific innovation & training opportunities, with focus on growth sectors and HotSW specialisation. Also HEI capacity within Somerset	Business Case stage, with multiple additional opportunities in process within HotSW HEI providers. Awaiting national outcomes	HotSW	All	People Ideas	ESL	Inclusive Growth

Section Three: Delivering the Key Opportunities

Introduction

Significant investment and activity is already underway across our eleven key opportunities, which are grouped for ease of reference around three over-arching themes: Advanced Engineering (which includes Manufacturing), Digital and Bedrock. There are a number of linkages and synergies across these themes with particular technologies and assets underpinning multiple opportunities. In all cases the existing activities have been accelerating productivity but each area requires further investment for the opportunities to realise their potential.

Advanced Engineering

The Advanced Engineering theme represents a new and growing market where there are multi-billion pound globally significant opportunities for the area. It builds on a range of assets as well established partnerships such as Nuclear South West and the South Coast Marine Cluster which provide strategic direction and a clear private sector voice for developments. The opportunity extends from Hinkley Point C and the Enterprise Zones in Somerset through to the naval base and marine Enterprise Zone in Plymouth with additional focal points around the UK's rotary wing sector in Yeovil. Advanced Engineering and Manufacturing have the potential to bring new sectors to the areas as well as creating innovation and growth opportunities. The theme specifically includes:

- **Nuclear** – where intervention is required to anchor the long term economic legacy of the cluster which includes Hinkley Point C as a leading nuclear new build project with £50bn of opportunities within a 75 minute radius; and Devonport Dockyard as home to the Royal Navy's nuclear submarine maintenance work;
- **Marine** – in which we benefit from our position within the South Coast Marine Cluster running from Cornwall to Hampshire and accounting for £2.54bn GVA but require intervention to help develop our growth opportunities; and,
- **Aerospace** – in which we have a world-renowned cluster of high value businesses with expertise in advanced engineering that could, with additional support, act as a stimulant for raising productivity in complementary sectors.

Digital

Our Digital assets are impressive with the Connecting Devon and Somerset Programme set to provide speeds of over 24 mbps to all premises in the CDS area by 2020, supported by a local Digital Skills Partnership which will enable key providers to be drawn into the region to develop the digital skills of our people and businesses. We have world-class data analytics capacity at the Met Office, Hydrographic Offices and University of Exeter and there is an opportunity to create a significant data analytics and photonics cluster stretching from Somerset down to Plymouth. This also has the potential to raise productivity in coastal areas through building on our nascent photonics capacity. Further, these assets can be leveraged to support other opportunities such as enabling innovation in healthy ageing to support better quality of life, environmental futures and improved business productivity. They also recognise the potential of artificial intelligence and robotics. In more detail, the Digital theme includes:

- **Photonics** – which, with further support, has the potential to develop a world class cluster with its concentration of high value supply chains and key role as an enabling technology across a broad range of sectors such as marine, aerospace, defence, and space applications;
- **Big Data** – in which we benefit from world leaders with the potential to transform of a wide range of sectors through improved performance;
- **Healthy Ageing** – where, with additional impetus, our demographic profile, academic expertise and industrial base could enable us to lead the way in the field of healthy ageing and health technology; and,
- **Creative Industries/Creative Economy** – which is a growing sector in its own right but with the right interventions could also drive significant growth and productivity across all sectors through spillover and multiplier effects.

Bedrock

The area also has a number of traditional strengths (albeit with relatively lower levels of productivity) in the visitor economy, land management/food production, defence and construction sectors. Whilst these sectors have lower than average levels of productivity, they form an important part of the economy and employ a significant number of people. These form part of our ‘Bedrock’ theme which specifically covers:

- **Farming, Food and Fishing** – which is characterised by an agri-food sector that is built upon a rich agricultural and horticultural heritage but where Brexit and technological changes are expected to bring about significant changes;
- **High Value Tourism** – in which we have an unparalleled breadth and depth of tourism assets and infrastructure to suit many tastes but intervention is needed to maximise its economic contribution and the quality of employment opportunities that are available through it;
- **Defence** – which underpins large elements of our marine, nuclear, aviation, photonics and digital industries and supports a plethora of innovative SME and micro businesses but needs further support to enable collaboration, overcome barriers to entry and help supply chains to compete and realise these technologies.
- **Construction** – which is characterised by stronger than average growth in the South West, driven by a number of significant infrastructure and capital regeneration programmes. Construction will play a significant role in delivering many of the growth projects outlined in this plan and is therefore an underpinning sector. Availability of skills is one of the biggest challenges.

Advanced Engineering – Nuclear (AE –N)

Key Opportunities

The area benefits from Hinkley Point C as a leading nuclear new build project with £50bn of opportunities within a 75 minute radius; and Devonport Dockyard as home to the Royal Navy’s nuclear submarine maintenance work. By 2030, it will be home to a world-renowned cluster of high value businesses with transferrable expertise in advanced engineering and expertise in nuclear decommissioning which will also act as a stimulant to raise productivity in complimentary sectors. Intervention is needed to anchor the long term economic legacy of the cluster in the south west; without it there is a significant risk that the supply chain jobs and businesses move elsewhere in the country. Our core approach is to:

[AE - N1] Develop a legacy of a world class engineering supply chain across civil and defence sectors

[AE –N2] Develop HotSW as a strong location for innovation in the nuclear sector, capitalising on the opportunity of the HPC construction and operation

[AE – N3] Develop the skills requirements for the nuclear life cycle (specifically MEH and de-commissioning) and nuclear defence (engineering), creating a world class decommissioning cluster

[AE – N4] Develop the South West as a key location for advanced engineering and manufacturing inward investment

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Supply chain project with HotSW, WoE and Wales (funders)	AE- N1	Hinkley Supply Chain Team (HSCT)	Delivery Partners – SCOC, SWMAS, Business West	£1.5m finishes 2020	£15m of contracts won by local firms supported through the programme (to date – 2018)	In line with contracted KPIs	Cross region	All	Business Ideas	BLI	Inclusive Growth
Nuclear SW – Inward Investment Service with HotSW (Local Authority funders – SCC / SDC / TD / WS) and WECA (IBB)	AE – N4	HSCT	SWMAS, Business West, IBB and HotSW LAs	£459.6K finishes 2020 (funding secured until March 2019)	14 landings achieved. 200 warm leads generated at WNE 2018	In line with contracted KPIs	Cross region	All	Business Places	BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Development of Gravity (Huntspill Enterprise Zone) as an anchor point for the early phase of the clusters	AE – N1	SDC	SCC, LEP, Industrial Partners, infrastructure partners (incl HE)	£4.2M	222a of industrial land with consent with potential to create a UK proposition to attract FDI to delivery Industrial strategy 2Msqft of commercial space; 4.5K jobs, 180% GVA uplift. 50-150 new businesses. 50MW electricity generations Potential to host innovation projects and trials, focus on R and D with a catapult, and KTP and KTN	Site remediation started Launch of development company and concept as an innovation campus: Gravity CPO underway and due to complete early 2019 Early discussions with potential occupiers and universities to create high value/ productivity scheme Initiation of M5 innovation conversation with Innovate UK	Somerset	Rural	Business Infrastructure Places	BLI	Inclusive Growth
Development of Somerset Energy and Innovation Centre	AE – N2	SCC	SWMAS, SCOC, BW	£8,029,172 (Capital £7,608,059, Revenue £421,114)	3000sqm of office, meeting and collaborative space, business assists 67, jobs created 15, businesses created 2, businesses working on collaborative projects 27, gross increase in GVA £7,010,930	Built and occupied. Funding secured for phases 2 and 3	Somerset	Rural	Business Infrastructure Places	BLI	Inclusive Growth Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Development of SW Nuclear Hub / Nucleate Project	AE – N2	Bristol University	NSW, Plymouth, UWE, So'ton Universities	£8m (SWNH) £4m secured for Nucleate	Engagement with industry and the public – international speakers showcase for businesses Engagement with national and regional policy Working with consortia including SEIC to create a technology pipeline	Robust collaboration potential with spin-outs to HotSW LEP area	Cross region	All	Business Ideas	BLI	Distinctive Assets
National College for Nuclear established	AE – N3	Bridgwater & Taunton College	EDF / UOB	£15m	Nuclear Degree, foundation Degree, L3, Degree Apprenticeships, mechanical and electrical engineering / top up courses, nuclear safety and ILM qualifications / courses developed	Facility open and providing high level technical training	Cross region	All	Infrastructure	ESL	Distinctive Assets
Hinkley Point Training Agency established	AE- N3	HPTA Board	LEP, EDF, BTC, AOC , DSTPN	£150K	Total numbers trained to date: c.1800+ Total training value to date: c. £250,000+ Five Colleges brought together to create the specific offer for the HPC MEH phase	Enabling contractors and their supply chains to connect with training providers	HotSW	All	Business People	ESL	Inclusive Growth Distinctive Assets
Investment in 5 FE Colleges and National College for Nuclear	AE- N3	LEP / HPTA	Bicton, Yeovil, BTC, Petroc, Exteter, South Devon, EDF	£10m	Deliverables in line with HPTA	Supporting Hinkley skills development and off-setting displacement of skilled workers	Somerset & Devon	All	Infrastructure People	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Supply Chain Secure continuation funding for supply chain development project from Nuclear Sector Deal (National Supply Chain & Business Competitiveness Programme)	AE – N1	LEP	HSCT	£0.5m per LEP for 3 year programme	Up to 20% of HPC build costs supplied from within region. Diversification of supply chain to other sectors. Viable legacy impact from winning MEH Contracts. Cross over opportunities in to SZC and BRB	Need to secure funding by end 2019	Cross-region	All	Business Ideas	BLI	Inclusive Growth
Understand potential of nuclear defence opportunity	AE – N1	LEP	MOD	Some pump priming / facilitation	% of £XB of contracts won locally – realising the £15bn opportunity (figure tbc)	Very initial scoping undertaken	HotSW	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Understand potential of decommissioning opportunity	AE – N1	LEP	SWMAS	Some pump priming / facilitation	% of £XB of contracts won locally – realising the £15bn opportunity (figure tbc)	Very initial scoping undertaken	HotSW	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Skills - support delivery of filling critical skills gaps for HPC and other advanced engineering / manufacturing sectors – specifically MEH	AE- N3	HSDF / LEP	LEP / NSSG	ESF calls (Shaping Future Skills Provision) and Skills in Employment Co-funding from EDF Energy / NSSG or NCfN for Skills for Nuclear Co-ordinator (2 years)	Defined top up training modules/accredited training requirements for transfer between trades/job roles. Raised awareness of these requirements with providers Meeting labour demands by enabling accelerated opportunities for mobility/transfer from other sectors. Managing the impact of demobilisation by creating opportunities to transfer from HPC to other projects	Develop HSDF delivery plan and align to current initiatives. Bids facilitated via Hinkley Training Alliance	HotSW	All	Business People	ESL	Inclusive Growth Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop robust/sustainable skills for large infrastructure projects	AE- N3	LEP / HSDF / NSSG	Industrial Partners / Developers	Funding identified by December 2018	Quality provision provided locally when required, providing greater opportunities for sustainable engineering careers and up-skilling	Learning and growing from existing HPTA 5 co-ordination	HotSW	All	Business People	ESL	Inclusive Growth Distinctive Assets
Support delivery of National Nuclear Skills Strategy at local level through development of local skills delivery programme	AE- N3	LEP / HSDF / NSSG	NSW S/holders	Pump priming / capacity building Supported by Skills for Nuclear Co-ordinator	Greater influence to Govt re skills for nuclear opportunities and challenges. Improved co-ordination with other regions – specifically joining up with Nuclear Sector 'Place Proposition'	Develop HSDF delivery plan and align to current NSSG priorities and identify local delivery options by Autumn 2018	HotSW / Nuclear regions	All	Business People	ESL	Inclusive Growth Distinctive Assets
Institute of Technology	AE – N3	See Employment, Skills and Learning Core Offer									
Innovation - secure funding for Somerset Energy Innovation Centre expansion	AE – N2	SCC / LEP	University of Bristol / SWMAS / Business West	£5.4m	Research and development space created for SMEs at TRL 7-9 readiness. For NNB and de-commissioning, and transferability into other sectors	SIPF EOI submitted – July 2018	Somerset	Rural	Business Infrastructure Places	BLI	Inclusive Growth Distinctive Assets
Develop business innovation programme, capitalising on SEIC	AE – N2	LEP / SCC	University of Bristol / NSW S/holders Bath University (Supply Chain Lab)	£1m	£10m GVA generated and 150 high level jobs in 5 years. 30+ products launched into the nuclear sector. 200 businesses supported including referrals across the programme. 25 companies with IP developed and 60 R&D collaborations	Develop programme by Spring 2019 dependent on funding outcome	HotSW/ SW region	All	Business Ideas	BLI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Infrastructure - realising the potential to stimulate the rebirth of advanced manufacturing and supply chain production in the UK for products	AE-N2 / AE – N4	LEP / LA's	Industry	£m's	Investment in key road schemes and employment land sites to allow for indigenous expansion, diversification into other complimentary technology sectors (i.e. automotive) and encourage niche FDI where in supply chain gaps	Scope infrastructure for Clean Energy infrastructure Investment Plan	HotSW	All	Business Ideas	BLI	Inclusive Growth
Export - establish export programme to connect to overseas markets	AE – N1	NSW / LEP	DIT	Pump priming / capacity for audit of activity and follow-up marketing material	Nuclear Export proposition understood and promoted to targeted overseas markets	Develop proposition by first Quarter 2019	HotSW / SW region	All	Business Ideas	BLI	Inclusive Growth
Inward Investment - continue to market NSW nuclear proposition, specifically to encourage FDI for overseas companies to partner with UK companies; or where there are niche capability gaps. Develop propositions based on technologies that cut across multi-sectors / commercial opportunities	AE-N4	NSW / LEP	DIT	Deliver a programme to support innovation in the supply chain (digital / tech) Deliver a programme that maximises our key commercial assets	New marketing campaign delivered with specific nuclear sectors targeted new nuclear / decommissioning / AMRs Add value to EZ proposition, specifically on transferability of technologies and tech cluster for advanced manufacturing into clean energy growth Encourage technology clustering to enable transferability across sectors such as automotive	Develop campaign for NDA event (Nov 2018). Create a national proposition for FDI post Brexit that builds on locality capacity and capability, piggy backs on nuclear investment, and attracts high value brands in mutually supportive sectors	HotSW / SW region	All	Business Ideas	BLI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Further UK Collaboration between nuclear industry rich regions to maximise future nuclear project opportunities	AE – N1	HotSW LEP	Cumbria, New Anglia, BEIS, NIC	Utilisation of existing Govt funding streams and initiatives	Implementation of a Nuclear Place based Deal leading to specific Govt investment targeted at nuclear regions. Continuation funding for Supply Chain activity	Some involvement with Sector Deal implementation	UK	Rural	Business People Places Ideas	BLI	Inclusive Growth Distinctive Assets

Advanced Engineering – Marine (AE-M)

Key Opportunities

The South Coast Marine Cluster runs from Cornwall to Hampshire and accounts for £2.54bn GVA, or 8% of the UK total and more than any other recognised UK cluster. Its 8,000 businesses employ 105,000 or 5% of the working age population. Whilst there are concentrations of activity around port towns and cities, many of these businesses are spread across inland areas and are engaged in numerous non-marine supply chains. Our industry is built on a combination of our excellent natural resources, the largest concentration of ports and harbours in the UK as well as a world class research base. We produce more marine and maritime related research than any other region in the world, with 32 world class research and development organisations, the south Coast has un-rivalled research and testing capacity which combine to create an excellent test bed for innovation. In HotSW, we have continuing investments in the Marine Industries Production Campus at South Yard. The OECD predicts that globally the Ocean Economy is expected to double in size by 2030. At a national level, the UK foresight report highlights the importance of emerging sectors many of which have a major presence in the South Coast Marine Cluster. Based on our review of emerging growth opportunities mapped against our local strengths with input from business and research partners, the South Coast Marine Cluster have concluded that there are three key complementary strategic growth opportunities:

1. High Value Marine Manufacturing
2. Marine Renewables
3. Marine Autonomy

There is a strong correlation/overlap between the underpinning competencies and infrastructure required for our specialisms and those recommended to develop other market opportunities including: Nuclear, Defence, Opto-electronics and Aerospace. These include:

[AE-M1] Cross-sector collaboration and supply chain development

[AE-M2] Commercial access to sites and infrastructure

[AE-M3] Skills and innovation

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Oceansgate Marine Enterprise Zone Phase 1	AE – M2	PCC	HotSW LEP	Growth Deal 2 £1.5m Growing Places Fund Loan £5m PCC grant £1.2m	177 jobs 2600m2 of floorspace	Building complete in May 2018. Eight out of 26 units let	National and international	Urban Coastal	Places Ideas Grand Challenges: AI, Future Mobility & Clean Growth	HCI BLI	Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Oceansgate Marine Enterprise Zone Phase 2	AE – M2	PCC	DCLG ref ERDF	PCC £6.1m Loan ERDF £2.2m MHCLG £5m grant	196 jobs 2900m2 floorspace	Construction commences March 2019 Building complete May 2020	National and international	Urban Coastal	Places Ideas Grand Challenges: AI, Future Mobility & Clean Growth	HCI BLI	Distinctive Assets
Oceansgate Marine Enterprise Zone Phase 3	AE – M2	PCC	MoD	DIO Loan £1m	600 jobs 3 dry docks 4 jetties A range of industrial buildings	£16m funding needs to be found before enclaving and remediation works can take place	National and International	Urban Coastal	Places Ideas Grand Challenges: AI, Future Mobility & Clean Growth	HCI BLI	Distinctive Assets
Marine Business Technology Centre	AE – M3	PCC	Plymouth & Exeter Unis, PML, Marine Biological Association	£2.7m, 3 years	97 businesses assisted	Live	Cross- region	All	Ideas Grand Challenges: AI, Future Mobility & Clean Growth	BLI	Distinctive Assets
'In sea' test range initiated	AE – M3	Public Private Partnership	PCC, PML, Plymouth University, MBA, Thales, Msubs, Sonardyne, wider SCMC Partners	Various public/private sources including in kind match. Additional funding sought through Strength in Places bid	Pipeline of product testing including Thales autonomous minesweeper, Autonaut, and Valeport sensors	Facilities and support already in place. The formal recognition of a body of water near Plymouth and accessibility of a wider suite of facilities is being developed	Coastal	All	Ideas Grand Challenges: AI, Future Mobility & Clean Growth	BLI	Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
South Coast Marine Cluster	AE-M1	HotSW LEP	LEPs, HEIs, LAs, Business, National and Internat	£100k PA, contributed by LEPs, LAs and HEIs	Create and guide delivery of sector growth strategy (LIS) Facilitate regional collaboration e.g. test range and £30m SIP bid Promote and communicate sector needs to UK Govt	Strategy and regional governance in place. Established brand, collateral and senior stakeholder relationships. Additional resource required to expand sector promotion and national influence	Cornwall, HotSW, Dorset, Solent and Hampshire	All	All Grand Challenges: AI, Future Mobility & Clean Growth	All	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Focused Innovation Support	AE-M3	Plymouth Uni	Several regional HEIs and SCMC	£30m Strength in Places Fund bid (EOI submitted)	8% productivity gain to supported businesses equal to £71 million GVA PA	Bid submitted, 2 nd stage announced Oct 2018	Cross-region	All	Ideas Grand Challenges: Clean Growth	BLI	Distinctive Assets
Brokerage to and investment in test facilities – including further development of in sea test range	AE-M2 AE-M3	SCMC	HEIs, Business and MOD	Coordination: £500k Assets £1,500 (covered in SIP bid)	Increased investment in R&D in region	Business case and coordination to be scoped. £5.27m covered in Strength in Places bid including capital for new investments	Cross-region	All	Ideas Grand Challenges: AI, Future of Mobility & Data Economy	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Broadband at sea and for coastal industrial sites	AE-M2 AE-M3	SCMC	Connecting Devon and Somerset, DCMS	Unknown	At sea: enables innovation via internet of things at sea with numerous applications e.g. safety, logistics, autonomy etc. On land: industrial productivity uplift	At sea – ISCF bid submitted for pilot Connecting Devon and Somerset current programme	Cross-region	Coastal	Ideas Grand Challenges: AI, Future of Mobility & Data Economy	BLI	Distinctive Assets
Cross-sector supply chain development	AE-M1	LEP & SCMC		£2m	Increased innovation, supply of skills, trade via access to new markets	Business case development £2m covered in SIP bid	Cross-region	All	Business	BLI	Distinctive Assets
Combined international marketing support	AE-M1	LEP and SCMC	DIT	Circa £75k PA	Collateral, combined promotion of opportunities	Business case development	Cross-region	All	Business	BLI	Distinctive Assets
Support to protect and develop potential marine sites	AE-M2	PCC	HEIs	TBC	Increased place offer to residents and visitors	In negotiation with UK Gov	Cross-region	Urban Coastal	Business Places	HCI	Distinctive Assets
Geospatial Digital Hub Support to create Geospatial Digital Hub as a focus and access to a national marine data asset and associated skills e.g. data science and data engineering	AE-M3	TDBC	Geospatial Commission UKHO, SCC, TDBC	£6m. £4.25m Geospatial Commission, £1.75m LEP/LAs	Geospatial innovation, business growth, and knowledge exchange. Est £40-45m GVA over 10 yrs	Business case development	Cross-region	All	Ideas Grand Challenges: AI, & Data Economy	Business leadership and ideas	Distinctive Assets Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Skills – enhanced up-skilling and reskilling opportunities in technical disciplines, developing clear pathways to the sector and with supporting training / learning delivered through the emerging Institute of Technology and wider provider partners	AE-M3	LEP & SCMC	HEIs, FE, SCMC Business Leadership Groups	ESF / SPF / ASB	Defined top up training modules for transfer between trades/job roles. Raised awareness of requirements with providers. Development of core capacity within the sector. Meeting labour demands	Business case development	Cross-region	All	People	ESL	Inclusive Growth Distinctive Assets
Skills – development / enhanced roll out of a Marine Industries specific CEIAG offer, building on existing resources developed by Maritime UK, and integrated within the emerging Careers Hub within HotSW	AE-M3	LEP & SCMC	Maritime UK, MOD	CEC, LEP / LA Match/ Private Sector Funding	Increased supply of skills to key sectors Increased engagement and uptake of marine roles by Young People	Careers Hub approved and in development process, with resources currently being mobilised	Cross region	All	People	ESL	Inclusive Growth Distinctive Assets
Skills – development of higher level apprenticeship pathways within the marine sector, working with relevant HEI and FE partners	A3-M3	LEP & SCMC	HEI, FE, Business Leadership Groups	ESF / SPF / HEIFC / Private Sector Match	Increased no. of graduates within STEM and other disciplines and increased uptake of higher level Marine occupations	Early business planning activity on-going with university and FE partners. Links to higher level apprenticeship capacity development across Advanced Engineering sectors	Cross region	All	People	ESL	Inclusive Growth Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Skills – pathway development for sector specialists to become trainers, leading to a broader and more robust curriculum offer	A3-M3	LEP / Providers	HEI, FE, Business Leadership Groups	ESF / SPF / FE Base Funding / Private Sector Match	Enhanced trainer capacity and industry specialisation within provider network. Tailored training provision for marine sector	Early business planning activity on-going with university and FE partners. Links to similar capacity development across Advanced Engineering sectors	Cross-region	All	People	ESL	Inclusive Growth Distinctive Assets
Skills – promotion of Marine Industry opportunities to adults working within wider industry, with retraining then supported by the emerging Adult Retraining Scheme and other core funding	A3-M3	LEP & SCMC	FE / DfE / ESFA / Business Leadership Groups	HEI / FE / DfE / ESFA / Private Sector Match	Up-skilling of in work adults. Increased wage and progression. Enhanced skills and capacity within the Marine sector	Inception / Wider Pilot Activity	Cross-region	All	People	ESL	Inclusive Growth Distinctive Assets
Skills - Leadership and Management skills development promoted and supported across the sector and its supply chain	A3-M3	LEP & SCMC	HEIs, FE, SCMC Business Leadership Groups	ESF / SPF / ESFA / Growth Hub	Enhanced business leadership and development. Peer to peer sharing of best practise and holistic enhancement of the SW in terms of business approach and methodology	Inception / part of wider business growth approach	Cross-region	All	People	ESL BLI	Inclusive Growth Distinctive Assets

Advanced Engineering – Aerospace (AE –A)

Key Opportunities

The area benefits from a long-established, sizeable and knowledge-intensive aerospace cluster centred on prime manufacturer Leonardo Helicopters in Yeovil, and the maintenance, repair and operational function that sits with Flybe in Exeter, in addition to this there are strong functional linkages to the wider SW cluster. It also has key geographical proximity to RNAS Yeovilton and MoD Abbey Wood

Aerospace is a significant strength for our area and a valuable contributor to productivity. In 2016 the aerospace sector in the HotSW directly employed about 5,500 people (FTE) and contributed about £408.4m (GVA) to the total economic output of the area. However, this vastly underestimates the cumulative value of the sector given the hundreds of SMEs within the local supply chain. Crucially, aerospace productivity in 2016 was £66,100 (GVA/FTE), or £34.35 (GVA/hour), compared to average productivity figures for the HotSW of £49,690 (GVA/FTE), or £25.83 (GVA/hour).

Based purely on the sectors recent trajectory, our economic projections tell us that by 2038 it will be worth almost half as much again to the HotSW economy, roughly £605.7m in real terms and its productivity will have slightly more than doubled to £134,900. However, this is dependent on the correct measures being in place to safeguard and support the sector over the next 20 years.

The above figures relate purely to the manufacture, repair and maintenance of aircraft and related machinery. They do not account for the significant activity within the supply chain. Nor do they account for the contribution of key assets like Exeter airport and the FlyBe Training Academy, which form an important part the aerospace proposition within this Delivery Plan. As a rough idea of the impact of these assets, ONS data tells us that ‘Air Transport Services’ within the HotSW contributed some £38.3m to the economy in 2016, and almost 900 jobs.

By 2030 the Heart of the South West will be home to a world-renowned cluster of high value businesses with expertise in advanced engineering specifically in relation to high value design, which will act as a stimulant to raise productivity in complementary sectors. Intervention is needed to anchor the long term economic legacy of the cluster in the south west; without it there is a significant risk that the supply chain jobs and businesses move elsewhere in the country. Given that many of the aerospace companies are also foreign owned, there is also the risk that they will leave the UK, if conditions post BREXIT become too unfavourable, or there is a lack of defence contracts awarded to relevant SW based primes.

Our core approach is to:

[AE - A1] Develop a legacy of a world class engineering supply chain across civil and defence sectors (aviation and aerospace)

[AE – A2] Develop HotSW as a strong location for innovation (specifically within the SME supply chain) in the aerospace sector

[AE – A3] Develop the skills requirements for high value design within the aerospace sector to enable the region to remain competitive

[AE – A4] Develop the South West as a key location for advanced engineering (aerospace) inward investment

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
iAero Yeovil - Capital build	AE- A1/A2	Somerset County Council	Leonardo	£7.63m	Aims to improve innovation within the SME supply chain	Construction due to commence Spring 2019	Somerset and cross-region	Urban	Business Ideas	BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Exeter College - High Value Engineering Centre	AE – A3	Exeter College	Industrial Partners	£3m	Meeting the growing industrial sector demand for skills in engineering, robotics and automated manufacturing	Opened 2018	Devon and cross-region	All	Business People	BLI	Inclusive Growth
Bridgwater & Taunton College Advanced Centre for Engineering (Taunton Campus)	AE – A2	BTC	Industrial Partners	£17.78m	ACE supports the growth of the advanced electrical engineering industries through: High level facilities for level 2 and BSc Hons learners and the rapidly growing SME sector located along the M5 and A38	Opened 2018	Somerset	All	Business Infrastructure People	ESL	Inclusive Growth
Bridgwater & Taunton College Advanced Engineering Centre (Bridgwater Campus)	AE – A2	BTC	Industrial Partners	£7.5m	The Centre houses a design thinking lab, welding workshops and composite laboratory, supporting collaborative projects with industry using materials that are transforming engineering and aerospace	Opened 2018	Somerset	All	Business Infrastructure People	ESL	Inclusive Growth Distinctive Assets
Flybe Skills Academy	AE – A2	Flybe / Exeter Airport	Flybe / Exeter Airport / Exeter College, University of Exeter	£24m	Aviation Sector adding £446m+ GVA per annum / 6,400 jobs / 10 years of high-quality skills provision / 756 cabin crew trained and flight ready / 700 students studying engineering at Exeter College / 500 degree-level engineers set to graduate in the next 3 years / 130 certified aerospace engineers trained	Academy opened 2010	Cross-region	All	Business People	ESL	Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Yeovil Innovation Centre – Phase 2	AE – A2	South Somerset DC	SCC / Industrial Partners / LEP	£0.42m	Extension to allow for further expansion of start-ups	Extension opened 2018, 9,500 sqft – 20 new units	Somerset	All	Business People	BLI	Distinctive Assets
South Devon UTC	AE – A3	South Devon UTC	Industrial partners	£11.3m	offers an innovative model of learning for students 14-19 that provides professional academic and technical education aimed to ‘develop a new generation of engineers, scientists and environmentalists. The curriculum also includes all year-round work experience opportunities and employability skills development	2018, 100% of post-16 Applied Science students gained distinction stars in all of their qualifications. 70% of Engineering students achieved at least one distinction star with over half of those achieving either two or three distinction stars	Devon	All	Business People	ESL	Distinctive Assets
MADE Project (South Devon)	AE – A3	TDA	Industrial Partners	Funded via City Deal	The MADE Pilot is a series of manufacturing focussed activities designed to inspire, motivate and engage participants in STEM (Science, Technology, Engineering and Maths) learning from Primary School, through secondary school into further education and beyond	Engaged with more than 2000 young people Created 160 STEM Ambassadors Partnered with 13 Torbay and South Devon schools etc	Devon	Rural	Business People	ESL	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Regional Strategy – Development of an overarching strategy to support SW Aerospace	AE- A1 AE- A2 AE –A3 AE A4	iAero	South West LEPs	No funding required for production of strategy	Overarching strategy and alignment of funding streams	First draft being developed by iAero	Regional	All	Business Ideas People	BLI ESL	Inclusive Growth Distinctive Assets
Supply Chain – Influence Defence sector procurement through defence sector deal (note this may move across to Defence Opportunity)	AE – A1	LEP	South West LEPs, Industrial partners and local authorities	Delivered through core funding	Sector deal influenced	On-going	HotSW	All	Business Ideas	BLI	Inclusive Growth
Supply Chain – Roll out regional supply chain support programme (hybrid S21) including support for collaboration, start-ups and incubation	AE – A1	i-Aero	SW LEPs, Yeovil Innovation Centre, Exeter Aviation Partnership	UK Shared Prosperity Fund	Initial MOU between SW LEPs setting out agreed principles for supporting aerospace	Concept development	SW region	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Supply Chain – Improve alignment between national catapult centres and regional assets/supply chain through improved outreach and take-up	AE – A1	iAero/WEAF	MCC, Industrial partners	Influencing existing activity, therefore no additional funding required	Greater involvement of HotSW businesses and organisations in HCM and NCC	On-going	SW region	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Innovation – Aerospace Entrepreneurship programme	AE- A2	SSDC	HEIs, SetSquared, Yeovil Innovation Centre, Leonardo	£20k pilot funding (SSDC/Leonardo /LEP)	A flexible business support programme built around entrepreneurs/innovators needs and adds value to the iAero South and Yeovil Innovation Centre projects	Scoping with implementation planned for Spring 2019	HotSW/ regional	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Innovation Industrial Digital Technology Centre (IDTC)	AE- A2	University of Exeter	Industrial Partners	£33.9m bid to SPF (matched by £29.9m). bid unsuccessful, but looking for new opportunities	Bridging the innovation gap between low level TRL and commercialisation focusing on autonomous systems, manufacturing 4.0. machine learning and AI into industry	Bid submitted	HotSW/ regional	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Innovation – Influence government for more funding for NATEP and a fair share for the SW	AE-A2	WEAF	Industrial Partners	Influencing activity conducted through existing resources	Securing more money from NATEP and fair share for SW	On-going	HotSW/ regional	All	Business Ideas	BLI	Inclusive Growth Distinctive Assets
Institute of Technology	AE –A3	See Employment Skills and Learning Core Offer									
Skills – Development of a portfolio of projects to widen the talent pipeline by building on existing pilot projects (e.g. South Somerset Aerospace Schools Academy, Torbay MADE project, Exeter Aviation Skills Accelerator Project and Flybe’s ‘Flyshe’ project	AE-3	LEP	Local Authorities, Industry Primes, FE and HEI collaborations	Initial resource required to fund research to identify existing activity and best practice	Improving STEM delivery in schools Improve quality of CEIAG Improve diversity within industry	Business case to be developed	HotSW	All	People	ESL	Inclusive Growth
Skills – Development of the Smart Aviation Cluster with capital support for expansion of the Flybe training academy and aligning to new opportunities for data/digitalisation	AE-3	Exeter Aviation Partnership	Exeter Airport, Flybe, UOE, Exeter College, Exeter CCI and East Devon DC	TBC	Bringing together partners to develop a step change in skills, innovation and growth in the aviation and aerospace sectors	Prospectus drafted for influencing	HotSW	All	People	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Trade and Investment - Joined up national and cluster level trade and inward investment strategy	AE-A4	SW Aerospace Partnership	DIT, iAero, IBB	TBC	Alignment of national and local activity (including events and communication)	On-going and in development	HotSW / SW region	All	Business	BLI	Inclusive Growth
Trade and Investment – Development of ambassador programme to encourage investment by Primes	AE-A4	LEP	DIT, Industry Partners and other key aerospace s’holders	TBC	Increased inward investment	In development	HotSW / SW region	All	Business	BLI	Inclusive Growth
Trade and Investment – Influence DIT contract to ensure dedicated regional aerospace trade advisors working closely with the cluster and regional trade association. To include post Brexit trade	AE-A4	Export for Growth (DIT)	iAero , WEAf, LEPs	Delivered by DIT (export for growth)	Increased Aerospace exporting Greater industry engagement, particularly those with untapped propensity to export Understanding of key export markets	On-going	HotSW / SW region	All	Business	BLI	Inclusive Growth

Digital – Photonics (D –P)

Key Opportunities

Photonics is a £12.9bn industry nationally, comprising over 1,500 businesses directly employing around 65,000 people and projected to grow around 8-10% per year. Across HotSW there is a strong and established cluster of 174 companies, employing 3,125 highly skilled people contributing over £516m per year (increasing to £918m to encompass the whole South West region) equating to 7% of total UK photonics output. The cluster boasts a broad range of capabilities across the value chain including; photonics component design, microelectronics, fibre optics, lasers, thin film and optical coatings, LED lighting, sensors & imaging and PIC packaging, and is a key enabling technology for: the UK Big Data sector valued at £27bn; UK Aerospace sector valued at £32bn; UK Defence sector valued at £23bn; UK Space sector valued at £14bn; UK Security and Resilience valued at £13bn; UK Civil Nuclear industry valued at £6.4bn; and, UK automation/ robotic industry valued at £218m

In summary our approach is to:

[D – P1] Develop a world class cluster in HotSW at the forefront of cutting edge innovation in R&D activity in the hi-tech sector – capitalising on the opportunities in 5G, Big Data, and autonomous vehicles

[D – P2] Provide skills and training for a highly skilled workforce to meet industry requirements across the photonics value chain

[D – P3] Grow and develop the supply chain and capabilities within the HotSW cluster in order to grow and retain the local value chain

[D – P4] Promote and market the world leading capabilities and expertise within the HotSW photonics cluster

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Torbay Hi-tech Forum	D – P1	TDA	LEP/ SDC/ UKRI/ local universities	On-going TDA in-kind contribution	Collaboration & sector sounding board. Combined industry voice to Govt, driving sector growth, working with HE/FE to develop future workforce and develop pan European sector relationships	Established and growing	South Devon	All	Business Ideas	BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Development of Electronics and Photonics Innovation Centre (EPIC)	D – P1	TC	TDA/ LEP/ MHCLG/ BEIS	£8m – TC, GD2, CCF, ERDF	Employment space, high skilled jobs, new products to market	Under construction – due to open April 2019	HotSW	All	Business Infrastructure People	ESL	Inclusive Growth
Hi-Tech Apprenticeship Framework/ Standard	D – P2	SDC	N/A	N/A	Hi-Tech apprenticeships [including at L4]	On-going engagement and provision	HotSW	All	Business People	ESL	Inclusive Growth Distinctive Assets
University of Exeter – Research in the application of quantum photonics	D – P4	University of Exeter	Industry	N/A	Academic and research expertise in Advanced Engineering & Physical Sciences, including Microwave & Quantum Photonics	On-going	International	All	Business People	BLI	Inclusive Growth Distinctive Assets
South Devon College Hi-Tech and Digital Centre	D – P2	SDC	TC, HEFC, LEP, ERDF	£17m, SDC, TC, HEFC, LEP, ERDF	Under construction, due to be operational Sept 2019	Supporting Hi-Tech and Digital skills development and work readiness	South Devon	All	Infrastructure People	ESL	Inclusive Growth
Secure foundation degree awarding powers [FDAP] in hi-tech and digital subjects	D – P2	SDC	Employers	£200K	Development of existing Hi-Tech & Digital HNC/ FD programmes to meet the changing needs of learners and employers	On-going. Aim; Foundation Degree awarding status by 2019	National	All	People Infrastructure	ESL	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Supply Chain Mapping	D – P3	LEP	TDA	£3K	Business intelligence and map of the local photonics supply chain	Concluded	HotSW	All	Business	BLI	Inclusive Growth
High Potential Opportunities deep dive	D – P4	DIT	HotSW LEP/TDA	N/A	HPO marketing opportunity and profile raising to define a clear proposition to target FDI	Early stages	International	All	Infrastructure	BLI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Development of an integrated photonics design facility	D – P1	University of Bristol	TDA/ CSAC/ University of So'ton/ LEP	Strength in Places Fund Establish Network	Development of new technology, partnership working	TBC	National	All	Business Ideas	BLI	Inclusive Growth
Development of White Rock Business Park as a Technology Park with Enterprise Zone status to support inward investment and the expansion of the hi-tech cluster	D – P1	TDA/ LEP	LEP/ TC/ SDC/ DfIT	£5m – enabling and infrastructure works	Employment space, creation of highly skilled job creation	TBC	Torbay	Coastal	Business Infrastructure Places	BLI	Inclusive Growth
Secure funding to expand the equipment and facilities in EPIC	D – P1	TC	TDA/ LEP	£2m required – SPF/ Strength in Places	SMEs and highly skilled jobs created and new technology	Identify funding options Autumn 2018	Torbay	Coastal	Business Infrastructure Places	BLI	Inclusive Growth Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Secure Higher Education status and degree awarding powers [BDAP] in Hi-Tech & Digital degree subjects, including accommodation strategy	D – P2	SDC	LEP/ DfE	£111m	Higher skills levels and qualified entrants to local labour market/ research partnerships and programmes	On-going, degree awarding status by 2020	National	All	People Infrastructure	ESL	Inclusive Growth
Develop a Hi-Tech & Digital degree programme	D – P2	SDC	TDA/ Employers	£250k	Up-skilling workforce, raising productivity	On-going, degree awarding status by 2020	National	All	People	ESL	Inclusive Growth
Develop business accelerator programme	D – P3	TDA	LEP/ SWAIN	£1m required	Creation of new hi-tech businesses and growth of cluster	Develop programme by Winter 2018/ 19 - dependent on scope for collaboration	HotSW	All	Business Ideas	BLI	Inclusive Growth
Lead Generation Programme	D – P4	LEP	TDA/ DIT	£150k	Inward investment/ FDIs	TBC	HotSW	All	Business Ideas	BLI	Inclusive Growth
Hi-tech soft landings package	D – P4	LEP	TDA	£250k	Inward investment/ FDIs	TBC	HotSW	All	Business Ideas	BLI	Inclusive Growth

Key Opportunities

The Heart of the South West has world leaders in this fast growing market and is home to unique and globally significant strengths in research and innovation capabilities in aspects of big data. Big Data is expected to contribute £241 billion to UK GDP by 2020 and to create 157,000 new jobs. Major research and technology intensive assets in the region include the UK Met Office - including its Hadley Centre, Informatics Lab and world-leading Supercomputer; University of Exeter's climate change expertise and the new Institute of Data Science and A.I. and Alan Turing Institute; the University of Plymouth's Cyber Security provision and Bid Data Group; Plymouth Marine Laboratory; the UK Hydrographic Office in Taunton; Rothamsted Research, the Environmental Future and Big Data Impact Lab and the SW Centre for Excellence in Satellite Applications. This strong group of assets attracts partnership with global organisations such as Amazon Web Services, Microsoft, Google, IBM, World Health Organisation and NASA. These assets will help translate foundational research into commercially viable solutions, catalysing the development of a multi-billion pound global market for big data, particularly in Environmental Intelligence market, where the collective and complementary strengths of these assets is unrivalled nationally or internationally. It is estimated that the global market for Environmental Intelligence alone is £100 bn.

Further opportunities exist to exploit our assets in digital health applications. The Royal Devon and Exeter NHS Trust and University of Exeter Medical School collaborations, the presence in the region of NHS Digital and the existence of the Exeter 10,000 database also provide a strong platform for the exploitation of health data. Our ageing and disbursed population make us an ideal testbed for e health solutions. The UK expects activities supported by satellite services alone to be £500bn by 2030 and the region is home to a Centre of Excellence in Satellite Applications. We also have an emerging education tech presence where data and AI is making significant improvements in educational outcomes. Workforce development initiatives such as the data skills escalator provides support for the underpinning data analytics skills.

The real power of data and data analytics is the potential for the transformation of a wide range of sectors. Large businesses are adopting big data tools to support automation and prediction of future trends. Emerging clusters of small start-ups in the region are using data to create sophisticated software solutions. The application of data analytics to key sectors for the region such as marine, and agri-tech has the power to transform these sectors and raise productivity. Multibillion global opportunities can be obtained from providing commercial services derived from data analytics, including Internet of things, Sensors (terrestrial and space), machine learning and AI. HotSW is home to a number of significant companies in sensor technology and there is considerable potential for trialling and testing of sensor technology with clear links to our strengths in photonics.

Our core approach is to:

[D - BD 1] Reach new markets – exporting/inward investment

[D – BD 2] Improve SME performance – addressing the long tail of productivity

[D – BD 3] Capitalise on innovation and automation

[D – BD 4] Address workforce skills

[D – BD 5] Develop natural capital markets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Environmental Futures and Big Data Impact Lab	D – BD 2 D – BD 3	University of Exeter	Plymouth University, Plymouth College of Art, Met Office, PML, Rothamstead, Exeter City Futures	£6.5m ERDF	Providing access to support with data analytics for SMEs in Devon. Collaborative research & development facility	First year of operation	Devon, Torbay and Plymouth	All	Business	BLI	Distinctive Assets Digital
Satellite Applications Catapult Regional Centre for Excellence	D – BD 2 D – BD 3	University of Exeter	Universities of Plymouth, Exeter and Falmouth, Met Office, PML, Rothamstead, Goonhilly Earth Station	£0.8m Partner contributions matched through Satellite Applications Catapult	Business support (including incubation Services and access to innovation and research for downstream data enabled businesses	Current contract ends in March 2019. New contract beg negotiated April 2019 to 2022	Cross-region	All	Business	BLI	Distinctive Assets Digital
European Space Agency Business Platform	D – BD 1 D – BD 2 D – BD 3	University of Exeter	Universities of Plymouth, Exeter and Falmouth	£200k European Space Agency	Support for business with access to ESA, focus on data	First year of operation	Cross-region	All	Business	BLI	Distinctive Assets Digital
The Strategic Employer Engagement in Devon (SEED)	D – BD 4	University of Plymouth	City College Plymouth Exeter College PETROC Plymouth College of Art South Devon College University of Exeter	£1.03m ESF	Promote improvements of skills provision by engagement with SMEs in relation to digital skills needs	Project in first year of delivery	Cross-region	Primarily rural, but not exclusively	Business	BLI	Distinctive Assets Digital Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Satellite Applications Catapult Regional Centre for Excellence	D – BD 2 D – BD 3	University of Exeter	Universities of Plymouth, Exeter and Falmouth. Met Office, PML, Rothamstead	£0.8m Partner contributions matched through Satellite Applications Catapult	Business support (including incubation Services and access to innovation and research for downstream data enabled businesses	Round 2 Funding Applications submitted for further Funding April 2019 – April 2022	Cross-region (Cornwall, Devon and Somerset)	All	Business	BLI	Distinctive Assets Digital
Support to create Geospatial Digital Hub	D – BD 3	See Marine opportunity									
The Strategic Employer Engagement in Devon (SEED)	D - BD 2 D – BD 4	University of Plymouth	City College Plymouth Exeter College PETROC Plymouth College of Art South Devon College University of Exeter	£1.03m ESF	Project is a partnership project with the Transition Region's HE and FE institutions coming together to promote improvements of skills provision by engagement with SMEs	Project in first year of delivery	Cross-region	All	Business	BLI	Inclusive Growth
Environmental Intelligence Accelerator	D - BD 1 D - BD 2 D - BD 3 D – BD 4 D – BD 5	University of Exeter	R&D institutions, local authorities, regional stakeholders and businesses	£30m Innovate UK: Strength in Places fund	Drive new market for environmental intelligence and position HotSW as a leading area globally	EOI submitted	Cross-region	All	Ideas	BLI	Distinctive Assets Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Data Analytics Skills Escalator - including 1. Exeter Digital and Data Education Hub 2. Outreach and Enrichment 3. CPD courses 4. Centre for Doctoral Training in Environmental Intelligence and AI	D – BD 4	University of Exeter	FE Colleges and Schools	1.£5.05m 2. £2m 3. £1m 3 £8m (funding awarded from UKRI, University and private sector)	Development of a comprehensive pipeline of data analytic skills including 50 new PhDs over 5 years	The Data Analytics Skills Escalator involves creating new and building on existing activities. Individual elements at a different stages of development	Exeter, but could be extended across the whole area	Urban	People	ESL	Inclusive Growth Digital
Institute of Technology	D - BD 4	See Employment, Skills and Learning Core Offer									
South West Institute of Technology (SWIOT) Observatory	D - BD 4	University of Plymouth	University of Exeter	£0.6m ESF bid	This aims bring businesses together, identify skills needs, foresight technology changes and develop better teaching and learning approaches	Funding bid submitted	HotSW	All	People	ESL	Inclusive Growth Digital
Open Innovation Building (Global Environmental Futures Campus)	D - BD 1 D - BD 2 D - BD 3	Exeter Science Park	Met Office	£6.1m Growth Deal 2	2000 sq m of employment space for new business development and growth	Business case approved	Located at Exeter Science Park but serving region	Urban	Ideas Business	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Exeter Challenge Research Lab	D - BD 3 D - BD 4	University of Exeter SPARX	University of Exeter SPARX	Proposed submission to DfEE	£20m project to establish a data and AI driven Hub to support improvements in STEM educational outcomes	Business case developed and discussed with BEIS and DFEE	Located in Exeter but serving region	Urban	People	ESL	Distinctive Assets Inclusive Growth Digital

Key Opportunities

The South West has the demographic profile, academic expertise and industrial base to lead the way in the field of healthy ageing and health technology. Health technology has the potential to enhance our growing centres of excellence around advanced engineering, digital innovation, microelectronics, big data, digital health and assistive technology. We want the South West to lead the way by building a national profile as the hub of industry and healthy ageing service excellence. It also has the potential to boost traditional industries including leisure and tourism, farming, agri-food, food and drink and mixed manufacturing which underpin much of the employment and production undertaken within the area.

Shifting demographics is a global phenomenon and the UK is no exception to these global trends. By 2066, the older population (60+) is projected to constitute approximately 26% of the total population in the UK with older people much more likely to live in rural and coastal areas. The HotSW LEP area has suffered long term and structural issues of lagging productivity coupled with an ageing population where the percentage of those aged over 70 is estimated to increase from 17% in 2017 to 24% by 2037. Public health expenditure is expected to rise from 5.9% of GDP in 1990 to an estimated 8.5% of GDP by 2060. This coupled with the projected doubling of care expenditure over the same period illustrates the need for deep-rooted structural reforms to ensure the sustainability of health and care systems. These challenges also offer opportunities for new products, processes and services that can drive economic growth and productivity, but the market is currently fragmented and underdeveloped. Whilst the health technology sector as such is still comparatively nascent, the potential to the area is enormous. The Medical, Health & Life Sciences, for example, show significant productivity, both relative to other HotSW sectors, and relative to the corresponding national average – the GVA per FTE is 23% higher. Combined with the Human Health & Social Work sector and the Digital Technologies sector it accounts for in excess of 107,000 FTE jobs and a combined GVA of over £4bn in the HotSW.

Our assets include the research and training capabilities of three universities that draw in substantial national and international funding and investment as well as a large student footprint in the clinical and life sciences, health and wellbeing, health professions and digital & computing disciplines, ensuring a strong supply of talent. Of particular note is the Health Technology Alliance comprising businesses, NHS trusts, Local Authorities, third sector organisations and academics as well as the Plymouth Health Technology Campus, co-locating one of the largest teaching hospitals in Europe with Plymouth Science Park and the International Medical and Technical Park, 28 health technology businesses; the University of Plymouth Medical and Dental Schools; the Peninsula Clinical Trials Unit; Plymouth Marjon University and the Peninsula Allied Health Centre. We also benefit from the Big Data capability within the University of Exeter and the Exeter Science Park along with Exeter's Health & Wellbeing campus, incorporating innovation, training and education, related businesses, and translational research expertise in Medicine, Sport and Health Sciences. We also benefit from. With VR Lab Research Space, Immersive Reality and Health Informatics expertise in Torbay and Digital Care and Health exemplars in Taunton and across the region, HotSW is also home to five NHS trusts and a multitude of NHS organisations and synergies with the neighbouring Cornwall & Isles of Scilly LEP for exchange of best practise and collaboration opportunities. Our core approach is to:

[D – HAHT – 1] Develop an integrated health and care research and innovation ecosystem that bring together patients, research organisations, health/care providers and industrial partners from a range of sectors to provide new, sustainable solutions to healthcare challenges of the 21st century

[D – HAHT 2] Accelerate business growth and productivity through market diversification and export led growth

[D – HAHT 3] Implement a mechanism to test, monitor and measure the health outcomes/societal benefits of new interventions and technologies to help adoption of new technologies and support inward investment opportunities

[D – HAHT 4] Develop skills at all levels to meet the current and future needs of businesses, public sector and individuals and improve levels of digital literacy

[D – HAHT 5] Develop and adopt new systems, technologies and processes, incl. apps, sensors, robotics, digital platforms etc

[D – HAHT 6] Promote regional, national and international collaboration and increase sector visibility, profile and coherency

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Innovation in Healthy Ageing	D – HAHT 1 D – HAHT 5 D – HAHT 6	Devon County Council	UoP; AHSN; West Devon Business Information Point	£655k ERDF 3 years	Business assists; collaborative R&D projects; development of new products, processes and services	Live	Devon	All	Ageing Society	BLI	Inclusive Growth Digital Technology
Transform Ageing	D – HAHT 1 D – HAHT 5	Design Council	AHSN; Centre for Ageing Better; UnLtd	£3.65m	Develop and deliver new solutions that better support the needs and aspirations of our ageing communities	Live	HotSW C&IoS	All	Ageing Society	BLI	Inclusive Growth Digital Technology
Plymouth Health Technology Alliance	D – HAHT 1 D – HAHT 2 D – HAHT 6	UoP	Plymouth City Council; University of Plymouth Hospitals NHS Trust; Plymouth Science Park; Torbay and South Devon NHS Trust; HotSW LEP Business	Internal funding	Develop the campus as the central component of the city's health research, innovation and economic activity. Promote collaboration opportunities. Develop an integrated health research and innovation ecosystem to provide new, solutions to health and care challenges of the 21 st Century	Live	Plymouth HotSW	All	Ageing Society	BLI	Inclusive Growth Digital Technology

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Ageing Well Torbay	D –HAHT 1	Torbay Community Development Trust	Voluntary and public sector; UoP	£6m National Lottery Community Fund 6 years	Reconnect older people and add value to their lives Stimulate aspirations and service redesign Promote a positive image of ageing locally	Live	Torbay	All	Ageing Society	BLI ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Further enhance the health innovation and Technology eco system in the SW peninsula to deliver transformational and sustainable growth within the health and social care sector [Strength in Places Fund bid]	D – HA HT 1 D – HA HT 2 D – HA HT 3 D – HA HT 4 D – HA HT 5 D – HA HT 6	UoP	AHSN; NHS Trusts; Local Authorities; Businesses; Third Sector	UKRI	Increase in productivity Increase in new jobs Increase in exports New health and care ecosystem	In development	HotSW C&IoS	All	Ageing Society	BLI ESL	Inclusive Growth Digital Technology

Proposed Future Activity	Outcome	Lead	Key Partners	Funding and Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Healthy Ageing Demonstrator Project	D – HAHT 2 D – HAHT 3 D - HA-HT 6	UoE	Local Authorities; businesses; data generators; third sector; universities	UKRI	Provide a mechanism for developing evidence based, customer-led products and services to support independent living	In development	HotSW C&IoS	All	Ageing Society	BLI ESL	Inclusive Growth Digital Technology
Plymouth Health Technology Campus	D – HAHT 1 D – HAHT 2 D - HAHT 5 D – HAHT 6	Plymouth Science Park	University of Plymouth Hospitals NHS Trust; UoP; PCC	TBC	Enhance sector visibility Promote collaboration and inward investment Support business access to finance and development of innovative technologies Support skills development	On-going, about to be launched	Plymouth; Wider region	All	Ageing Society	BLI ESL	Inclusive Growth Digital Technology
Big Data Impact Lab	D – HAHT 5	See Big Data opportunity									

Digital – Creative Industries (D-CI)

Key Opportunities

The Creative Industries is a rapidly growing, innovative and resilient sector both nationally and regionally and includes those industries which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. The Creative Industries drive significant growth and productivity across all sectors through spillover and multiplier effects. There is a strong correlation between creativity and productivity, and there is a wide body of research demonstrating the significant positive impact of the Creative Industries on society, health and wellbeing, social cohesion, skills, education and the economy.

The wider Creative Economy, which includes the Creative Industries, the Cultural Sector, their overlaps with the Digital and Tourism Sectors and creative jobs which are in non-creative organisations (e.g. design or marketing teams within manufacturers) comprises an estimated 3.12m jobs or 1 in 11 of all UK jobs. The Creative Industries account for 2.5 million jobs. The Gross Value Added (GVA) of the UK Creative Industries was provisionally estimated at £101.5bn in 2017. The UK Creative Industries exported £27bn of services in 2016. Between 2010 and 2017, GVA rose by 53.1 per cent in the Creative Industries - much faster than the 29.7 per cent increase in the economy as a whole during the same period. Creative employment has been growing rapidly. In the South West, a number of key Creative Industries offer high productivity relative to the national average. The biggest sub-sector here is IT, software and computer services, which employs 45,000 people. Music, and the performing and visual arts gives work to 23,000 people. In addition, 13,000 people work in publishing, 11,000 in advertising and marketing, 7,000 in architecture, 10,000 in design, 8,000 in museums, galleries and libraries, and 12,000 in film, TV radio, video and photography .

Within the HotSW area, the sector is characterised by high levels of arts and cultural investment; key assets include: a high concentration of Universities and Colleges with an arts / creative focus as well as research intensive universities, ensuring a strong supply of talent, in terms of students and graduates, academic, technical and professional services staff, coupled with access to cutting-edge research and development facilities to enable innovation; connectivity to nationally significant cultural and heritage assets, capitalising on our natural capital and the attractiveness of the South West as a place to live and work. Our core approach is to:

[D-CI 1] Promote intra-regional, inter-regional and cross-sector collaboration

[D-CI 2] Enhance our visibility, profile and coherency

[D-CI 3] Grow and develop the supply-chain

[D-CI 4] Develop our people

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
South West Creative Technology Network (SWCTN)	D-CI 1 D-CI 2 D-CI 3 D-CI 4	University of the West of England	University of Plymouth (UoP), Falmouth Uni, Bath Spa Uni, Kaleider, Watershed	£6.5m project (inc. £4.6m from Research England's Connecting Capabilities Fund)	Expand the use of creative technologies (within themes of Immersion, Automation and Data) across the SW of England	Live Start: 01/04/18 End: 31/03/21	Regional	Urban, Rural & Coastal	Ideas People Artificial Intelligence and Data	BLI ESL	Distinctive Assets Digital Technology

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
The Market Hall	D-CI 1 D-CI 2 D-CI 3 D-CI 4	Real Ideas Organisation (RIO)	UoP, Plymouth City Council (PCC), Devonport High School for Boys, City College Plymouth	£TBC	Establish a world-class digital creative hub for research, enterprise and community engagement	Live	Regional, National and International	Urban & Coastal	Ideas People Artificial Intelligence and Data	BLI ESL	Distinctive Assets Digital Technology
Mayflower 400 & Illuminate	D-CI 2 D-CI 4	Destination Plymouth (DP), PCC	UoP, RIO, Plymouth College of Art (PCA), Arts Council England (ACE), Heritage Lottery Fund (HLF), DCMS, Visit Britain, Visit England, Royal Navy	Approx. £12m	2020 cultural and creative 12 month programme and showcase; citywide branding and place making; 1 million visitors; increased resident engagement and pride	Live	Regional, National and International	Urban & Coastal	People Places	BLI	Distinctive Assets Digital Technology
The Box, Plymouth	D-CI 1 D-CI 2 D-CI 4	PCC	UoP, South West Film & Television Archive (SWFTA), South West Image Bank (SWIB)	£44m combined capital and revenue including contributions from HLF, ACE, Coastal Communities Fund (CCF) and others	Galleries, hosting community, local and national touring exhibitions, artistic projects and commissions; public archive and research room; events programme	Live Building due for completion Spring 2020	Regional, National and International	Urban & Coastal	Places	ESL	Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
iMayflower	D-CI 1 D-CI 2 D-CI 3 D-CI 4	PCC	UoP, RIO, DP, PCA, Plymouth Culture	£5.9m project (inc. £3.5m from ACE / DCMS Cultural Development Fund)	Expansion of citywide events and activities including Mayflower 400, Market Hall, Illuminate, The Bridge etc.; increase growth and productivity of CI businesses; provide access to innovative finance and business support; creation of 350 jobs; engaging over 1.4 million people; delivering skills training to over 4,000 people	Start: 01/04/19 End: 31/03/22	Regional	Urban	Ideas People Places	BLI ESL	Distinctive Assets Inclusive Growth
Great Place Scheme	D-CI 1 D-CI 2 D-CI 4	Torbay Culture (TC)	TDA, English Riviera BID Company, Torbay Council, NHS/CCG, TC and Arts Network, Torbay Community Development Trust	£1.6m over 3 years (2017-2020); grant from ACE and HLF	Cultural programme; town centre regeneration; destination management plan; arts, health and wellbeing projects; marketing and audience development	Halfway through delivery	Local	Urban & Coastal	Ideas, People, Infrastructure, Environment, Places, Ageing Society	BLI ESL HCI	Distinctive Assets Inclusive Growth Digital Technology

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
EPIC	D-CI 1 D-CI 2 D-CI 3 D-CI 4	See Photonics opportunity									
South Devon College Hi-Tech and Digital Centre	D-CI 4	See Photonics opportunity									
Exeter Cultural Strategy	D-CI 1 D-CI 2 D-CI 3 D-CI 4	Exeter Culture	Cross sector city partners, NPOs	ACE, UoE, ECC	New City Strategy focusing on areas of international, wellbeing, talent development, making and connectivity	Complete in April. Launch in May/June	Local, National, International	Urban & rural	Ideas People Places Infrastructure	BLI ESL	Distinctive Assets Digital Inclusive Growth
Exeter city projects including: AoF Demonstrator; Exeter Bus Station Cultural Redevelopment; Custom House; UNESCO Creative Cities Programme: Exeter City of Literature; VSimulators Lab	D-CI 1 D-CI 2 D-CI 3 D-CI 4	Various	UoE, ECC, DCC, Literature Works, University of Bath, Custom House, NPO network + others	Innovate UK, ECC, ACE, UoE, Exeter Canal & Quay Trust, ACE (application in currently), EPSRC etc.	New technology (VR, AR, MR) to reimagine Museum & heritage experience; cultural capital options; Creative Writing Centre and more	On-going - 2021	Local, Regional, National, International	Urban, rural, coastal	Audience of the Future ISCF Infrastructure	ESL HCI	Distinctive Assets Digital Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
EU funded programmes including: Creative Cultivator, EPIC, Atlantic Youth Creative Hubs, Hidden Talent in Devon/Somerset. The Strategic Employer Engagement in Devon (SEED) and Big Data Impact Lab	D-CI 1 D-CI 2 D-CI 3 D-CI 4	Various	PCA, UoP, PCC, CCP etc.	ESIF programmes	Business start-up support, skills training and development, inclusive growth, knowledge exchange and support SMEs	On-going - 2021	HotSW, Regional, National, European	All	AI & Data Clean Energy	BLI ESL	Digital Inclusive Growth
Cultural Partnerships: - Torbay Culture	D-CI 1 D-CI 2 D-CI 3 D-CI 4	TDA and TC board	Torbay Council, ACE, HLF, English Riviera BID Company, NHS/CCG	ACE and HLF with in-kind support from TDA, various partners and projects	Locality-focused development of cultural sector including: profile raising; cultural strategy; partnership building with other sectors	On-going	Local, Regional	Urban, coastal	Ideas People Infrastructure Places Ageing Society	BLI ESL	Distinctive Assets Inclusive Growth Digital
Cultural Partnerships: - Exeter Culture	D-CI 1 D-CI 2 D-CI 3 D-CI 4	Exeter Culture (EC)	Cross city, cross cultural sector partners	ACE, ECC, UoE, BID (Into Exeter), Exeter College	Cultural Strategy; International Exchange Programme; Cultural Cities Conference; increased investment	ACE Funding up to June 2020	Local, national & international	Urban & Rural	Ideas People Places, Infrastructure	BLI ESL	Distinctive Assets Digital Inclusive Growth
Cultural Partnerships: - Plymouth Culture	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Sector Economic Analysis & Mapping	D-CI 1	HotSW LEP	UoP, TDA, TC, TBC		Mapping and quantification of the CI; economic evidence base; comprehensive identification of key projects and USPs to inform future activity; improved market intelligence	Scoping	Local & Regional	Urban, Rural & Coastal	Ideas	BLI ESL	Distinctive Assets
	D-CI 2								People		
	D-CI 3								Infrastructure		
	D-CI 4								Environment Places		
Development of co-working spaces within specific geographies	D-CI 1	TBC	TBC		Increase market share, growth and productivity of CI businesses; transmission of ideas, skills and content to other sectors; increased demand for CI products and services; connectivity with nationally significant creative centres	Scoping	Local & Regional	Urban, Rural & Coastal	Ideas	BLI ESL	Distinctive Assets Inclusive Growth Digital
	D-CI 2								People		
	D-CI 3								Infrastructure		
	D-CI 4								Places		

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Growth programme / Incubation, Innovation and business development support	D-CI 1	TBC	UoP, Torbay Digital Network, TBC		Innovative Finance Support (scale-up and stay-up); innovation funding (e.g. challenge funds); Appropriate local co-working space/s; enhanced connectivity to regional projects	Scoping	Local & Regional	Urban, Rural & Coastal	Ideas	BLI ESL	Distinctive Assets
	D-CI 2								People		
	D-CI 3										
	D-CI 4										
Export programme	D-CI 3	TBC	TBC		Increase market share, growth and productivity of CI businesses; identifying and exploiting new markets	Scoping	International	Urban, Rural & Coastal	TBC	BLI	Distinctive Assets Inclusive Growth Digital
Showcasing events and initiatives (large-scale, cross-LEP geography, focus on USP)	D-CI 1	TBC	UoP, TBC		Actively promote and showcase our capabilities	Scoping	Local, Regional, National & International	Urban, Rural & Coastal	Ideas	BLI ESL	Distinctive Assets Inclusive Growth Digital
	D-CI 2								People		
	D-CI 3								Places		
	D-CI 4										
Sector leadership and governance development / development of a Creative Industries Cluster	D-CI 1	TBC	UoP, TDA, TC, Exeter University, EC, TBC		Support creative and cultural leadership development; attract/ retain talent	Scoping	Local & Regional	Urban, Rural & Coastal	People	BLI ESL	Distinctive Assets Inclusive Growth Digital
	D-CI 3								Places		
	D-CI 4										

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Place-based marketing and PR strategy to increase profile and reputation / Develop HotSW-wide identity for Creative Industries (claiming “who we are” and why to work here)	D-CI 2	TBC	UoP, TDA, TC, TBC		Shared ambition for CI investment; attract larger CI businesses; eradicate silos and focus on clustering of activity; develop a coherent and recognisable brand / identity; actively promote and showcase our capabilities; improve connectivity	Scoping	Local, Regional, National & International	Urban, Rural & Coastal	Ideas People Infrastructure Environment Places	BLI	Distinctive Assets Inclusive Growth Digital
Skills development programme	D-CI 4	TBC	UoP, TBC		Meet the gap in productivity; attract and retain talent; support CI leadership development	Scoping (Pilot via Cultural Leadership Development Programme within iMayflower)	Local & Regional	Urban, Rural & Coastal	People Places	BLI ESL	Distinctive Assets Inclusive Growth Digital
Future jobs fund or similar (to de-risk growth)	D-CI 3	TBC	TBC		Enhance viability and sustainability of CI businesses; create more and higher value jobs; attract inward investment	Scoping	Local & Regional	Urban, Rural & Coastal	Ideas People	BLI ESL	Distinctive Assets Inclusive Growth Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Future High Street Programme	D – CI 2	Local Authorities	TBC	Future High Street Fund	Cultural and Creative Industries engaged in revitalisation of a future facing high street offer	Applications in March 2019	Local, regional & national	Urban	Ideas People Infrastructure Environment Place	BLI	Distinctive Assets Inclusive Growth Digital

Key Opportunities

HotSW has a strong agri-food sector built upon a solid foundation of primary production across agriculture, horticulture and fishing. We have more cattle than any other LEP in England (17%) and Brixham and Plymouth sit alongside Newlyn in Cornwall as the three key fishing ports in England. Our primary producers support a full range of food and drink processors, from internationally recognised names to a growing artisanal sector, producing everything from dairy products, fish, shellfish, meat, fruit and vegetables, wines and beers, spirits and much more. We also have nationally significant R&D assets including several land based colleges, Bridgwater Agri-tech Centre, Rothamsted Research, the Food Security and Land Research Alliance, the Agri-Epi Centre, the Royal Bath and West of England Society’s rural Enterprise Centre and Food Enterprise Zone. By 2025, the agricultural technology sector is expected to be worth more than £136bn globally, a key market opportunity for our emerging agri-tech cluster. Across the whole South West region, agriculture and food and drink manufacturing account for £2.9bn GVA² (11% of England’s agri-food GVA), and 332,416 jobs³. However, farm incomes in the South West were 20% lower than the England average and subject to considerable volatility.

Brexit is expected to bring about significant changes, providing a once in a lifetime opportunity for fundamental reform of direct support arrangements as well as a move towards payments for public goods (e.g. environment and health) as articulated the Agriculture Bill (currently before Parliament). The SW Rural Productivity Commission highlighted the need for LEPs to help farmers and their supply chains prepare for these changes by improving performance and productivity so we are working with our partner LEPs (C&IOS, Dorset and SWLEP) to progress joint activity. However, Brexit potentially offers significant benefits to the fishing industry which could see a net gain of £420m to the UK fishing industry. Despite being a source of pride and identity for our region the industry struggles to attract new talent and entrants to the market. Our collective aim is to build on our existing strengths to develop a world leading, internationally recognised proposition that is known for its high quality, healthy, competitive and sustainably produced products. Our core approach is to:

[B - FFF 1] Improve balance of international trade – increasing exports and import substitution

[B – FFF 2] Improve SME performance – addressing the long tail of productivity

[B – FFF 3] Capitalise on innovation and automation, through collaboration and dissemination

[B – FFF 4] Develop modern, relevant skills and address skills shortages

[B – FFF 5] Broaden and deepen links between food and drink and high value tourism

[B – FFF 6] Develop natural capital markets

² ONS, Regional GVA (note, it is not possible to disaggregate sectoral GVA at LEP level)

³ BRES plus DEFRA agricultural statistics

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
RDPE Growth Programme – Food Processing	B-FFF1 B-FFF2 B-FFF3	Rural Payments Agency	Applicants	£7.54m	Projects that create/ expand food processing businesses for growth and productivity	Closed to new applicants May 2018	HotSW	Rural	Business Infrastructure	BLI	Distinctive Assets Inclusive Growth
RDPE Growth Programme- Business Development	B-FFF1 B-FFF2 B-FFF3	Rural Payments Agency	Applicants (SMEs)	£3.8m	Projects to help rural businesses grow and create more jobs	Closed to new applicants May 2018	HotSW	Rural	Business	BLI	Inclusive Growth
LEADER – Grants scheme (including farm productivity and support for micro and small enterprises and farm diversification)	B-FFF1 B-FFF2 B-FFF3	8 Local Action Groups	Local Action Groups	£12m across all LEADER priorities	Projects to promote business growth and job creation in rural communities	Largely closed to new applicants	8 LEADER scheme areas	Rural	Business	BLI	Inclusive Growth Distinctive Assets
Various localised food and drink initiatives including: Exmoor Food and Drink Trail (app); England’s Seafood Coast; and, Dartmoor Farmers	B-FFF5	Various	Various	Various	Various	On-going	Local	Rural Coastal	Business	BLI	Distinctive Assets
Enhancing Natural Capital – South West Partnership for Environment and Economic Prosperity (SWEEP)	B- FFF2 B- FFF5 B- FFF6	SWEEP	University of Exeter, University of Plymouth and Plymouth Marine Laboratory	Natural Environment Research Council	Help deliver economic and community benefits to the SW, whilst protecting and enhancing the area’s natural resources	On-going until 2023	Cross- region	Rural Coastal	Place	HCI	Distinctive Assets

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Fishing industry safety programme	B-FFF3 B-FFF4	PCC	PCC / Local Fishing Industry / other local authorities / MMO/EMFF	£109,000 (75% EMFF / 25% PCC)	Deliver PLB (Personal Locator Beacon) lifejackets to fishers who land in Plymouth	1 st round complete with 250 amount of life jackets delivered. Round 2 underway with 60 on order/	Focused in Plymouth with wider benefits for HotSW	Coastal	Business Ideas Place	BLI ESL	Distinctive Assets
Fishing industry support	B-FFF1 B-FFF2 B-FFF3 B-FFF4 B-FFF5	PCC	PCC / Local Fishing Industry / other local authorities / MMO/EMFF	TBC	Fishing Industry Development Manage to create a plan for sustainable fishing and work to modernise and increase productivity of the fishing industry	Project has commenced	Focused in Plymouth with wider benefits for HotSW	Coastal	Business Ideas Place	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
SW Exporting Supply Chain Service – supporting small and micro businesses to overcome barriers to exporting through co-operative approaches to aggregate supply	B-FFF1	TBC	South West LEAs, Taste of the West, DIT and other commercial partners	Approx £500,000 for regional pilot	Increase in food and drink exports	Concept development	Cross-region	Primarily rural, but not exclusively	Business	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop and pilot agri-food and drink Business Advice Pilots – helping businesses respond to Brexit and key policy changes	B-FFF2	TBC	LEPs, NFU, National Parks, Food and Drink groups	£4m/year (across four LEP areas)	Productivity improvements Regional evidence about what works and why	Concept development	Cross-region	Primarily rural, but not exclusively	Business	BLI	Distinctive Assets Digital
Develop SW Agritech network	B-FFF3	TBC	Research establishments, private sector reps, local authorities	TBC	Mapping sector capabilities and opportunities Improved collaboration Dissemination of innovation	Network established in April 2019	Regional	Rural Coastal	Ideas	BLI	Distinctive Assets
Develop agri-tech and AI projects and encourage commercial applications	B-FFF3	TBC	Research establishments, HE, private sector reps	TBC Universities CIEL, Agri EPI	Drive sector productivity Enhance commercial applications	Concept development	Cross-region National capability	Primarily rural, but not exclusively	Ideas	BLI	Distinctive Assets Digital
Food SW – Strength in Places Fund bid	B-FFF3	Business West	R&D institutions, local authorities, regional s/holders and businesses	Innovate UK: Strength in Places fund	Drive productivity of whole food supply chain	EOI submitted, result expected soon	Cross-region	All	Ideas	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
A Virtual Food and Drink Skills Academy – including flexible apprenticeship models, closer links with industry/education, career pathways and demand aggregation between providers	B-FFF4	FE Colleges	LEPS, education providers and businesses	TBC Flexibilities in use of apprenticeship levy an option	A cohesive skills offer that meets the needs of industry New entrants attracted	Concept development	Cross-region	Rural	People	ESL	Inclusive Growth Digital
SME Small Grant schemes	B-FFF 2 B-FFF 3 B-FFF5	Local Action Groups	LEP	£12m (based on existing programme) UKSPF	SME Growth and Productivity	Requiring funding for future delivery	HotSW	Rural Coastal	Business	BLI	Distinctive Assets
Marketing and brand development – linking to tourism opportunities	B-FFF5	TBC	DMOs and food and drink groups?	TBC	Increased brand awareness at home and abroad	Concept development	HotSW, although may be some merit in wider partnership	All	Business	BLI	Distinctive Assets
Development of food and drink manufacturing sites/premises	B-FFF2	Local Authorities	Private sector	Proactive planning policies (PPAs)	F&D company expansion	Concept development	HotSW	All	Business	BLI HCI	Distinctive Assets
Enhancing the Food Enterprise Zone – linking SME productivity, knowledge transfer and inward investment/workspace	B-FFF2 B-FFF3	TBC	RBWES, Local authority, DEFRA, LEP, developer	Growth Deal/ UKSPF and developer matched contributions	Delivering SME growth, knowledge transfer and food workspace	LDO adopted 2018. £0.65m investment to date. Further business case in progress	Cross-region	Rural	Business Ideas Places	BLI HCI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Modernisation of fishing operations	B-FFF1 B-FFF2 B-FFF3	TBC	Local Authorities, regional s'holders and business	Shared Prosperity Fund, Marine Maritime Organisation / EMFF	Modernise and increase the productivity of the fishing industry, alongside potential infrastructure improvement works	Business case development	TBC	Coastal	Ideas Business Places	BLI HCI	Distinctive Assets
Brand development and marketing of HotSW fishing industry	B-FFF1 B-FFF2 B-FFF3	TBC	Local Authorities, regional s'holders and business	Shared Prosperity Fund, Marine Maritime Organisation / EMFF	Develop a distinctive brand for the region's fishing industry to achieve higher market value and increase export opportunities	Business case development	TBC	Coastal	Ideas Business Places	BLI HCI	Distinctive Assets
Enhancing Natural Capital – Environmental Land Management Trials	B-FFF5 B-FFF5	National Parks	Farmers and land managers	DEFRA	Pilot approaches tested across the region	Proposals submitted to DEFRA	Dartmoor and Exmoor National Park	Rural	Business Places	HCI	Distinctive Assets

Bedrock – High Value Tourism (B–HVT)

Key Opportunities

The Heart of the South West has an unparalleled breadth and depth of tourism assets and infrastructure to suit many tastes. We have outstanding natural capital covering national parks, AONBs and award winning beaches and coasts. We have cultural treasures and events including stately homes, museums and festivals as well as opportunities for celebration including the Mayflower 400 celebrations in 2020. Our cities, towns, coasts and rural areas all play a part on our tourism economy. The tourism sector accounts for 92,000 jobs and £1.45bn GVA and its strong multiplier effects to other sectors mean that its economic importance shouldn't be underrated, especially in more rural and peripheral areas, where it represents a greater proportion of employment. However, productivity is lower than average providing considerable scope for improvement. In part this reflects the high number of small, often lifestyle led businesses in the area. At the same time the digital age is having a disruptive effect on the sector with new business models and modes of engagement challenging the traditional paradigms. We must respond to these challenges to maintain and extend our market share into new high value opportunities. Intervention is therefore needed to maximise the economic contribution from this important sector and the quality of employment opportunities available through it. This challenge was highlighted in the SW Rural Productivity Commission work and so we are continuing to explore partnership working with our neighbouring LEPs (C&IOS, Dorset and SWLEP). Our collective aim is to become an exemplar of high value, sustainable, tourism 365 days/year. Underpinning the process is a commitment amongst partners to use collective resources more effectively by reducing duplication and sharing best practice, whilst capitalising on individual identities, as well as benefitting from the globally recognised South West brand to attract international visitors. Our core approach is to:

[B - HVT 1] Develop a sustainable approach to destination management - to provide clearer strategic leadership/direction and use resources more effectively

[B - HVT 2] Boost workforce skills and make tourism and hospitality a career for life

[B – HVT 3] Drive productivity improvements by extending the season, reaching new markets and supporting businesses to improve their management and quality of offer

[B - HVT 4] Improve connections – increasing inbound visits and making it easier for people to get here

[B – HVT 5] Develop place based solutions – maximising the opportunities to boost economic performance through integrated actions at the local scale (including Tourism Action Zones)

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
RDPE Growth Programme- Business Development	B-HVT 3	Rural Payments Agency	Applicants (SMEs)	£3.8m (call value)	Projects to help rural businesses grow and create more jobs	Closed to new applicants May 2018	HotSW	Rural	Business	BLI	Inclusive Growth
RDPE Growth Programme- Tourism Infrastructure	B-HVT 3	Rural Payments Agency	Applicants (SMEs)	£4.46m (call value)	Projects to encourage tourists to come, stay longer and spend more	Closed to new applicants May 2018	HotSW	Rural	Business	BLI	Inclusive Growth

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
LEADER – Grants Scheme (including rural tourism)	B-HVT 3 B-HVT 5	8 Local Action groups	Local Action Groups	£12m across all LEADER priorities	Projects to promote business growth and job creation in rural areas	Largely closed to new applicants	8 LEADER Scheme areas	Rural	Business	BLI	Inclusive Growth Distinctive Assets
Discover England Funded Projects <ul style="list-style-type: none"> • SW Coast Path (year 1) • England’s Seafood Coast (year 1, 2 and 3)) • Great West Way (yr1 &y2) • Connections (led by Plymouth (yr2) • English National Park Experience Collection (year 2, large scale) • Great SW Peninsula (year 3) 	B–HVT 3 B–HVT 4	Varied by project	Depends on project	Discover England Fund	Development of tourism products targeting international markets	Year 1 projects were delivered by March 2017, year 2 by March 2018 (except the national parks project which completes in March 2019) and year 3 projects which will complete by March 2019	Projects were a mixture of local, regional and national	Rural, urban and coastal, depending on project	Business	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop a sustainable approach to destination management across the area	B - HVT 1	TBC	DMOs	TBC	Sustainable Destination Management organisations	Concept development	HotSW	All	Places	BLI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop regional Intelligence Observatory – intelligence to identify key market segments	B - HVT 1	TBC	SW LEAs, DMOs and designated landscapes	TBC	Accurate, timely evidence base for decision making	Concept development	Cross-region	All	Places	BLI	Distinctive Assets
Develop approaches to capitalise on key high value market segments (e.g. business events, accessibility etc.)	B –HVT 3	TBC	TBC	TBC	Increase visitor numbers and expenditure	Concept development	HotSW	All	Places	BLI	Distinctive Assets
Develop business support offer through integrated approach including: <ul style="list-style-type: none"> • Business benchmarking • Using digital and technology • Grant scheme to fund investment in transformation and new product development 	B – HVT3	TBC	TBC	TBC	Increase sector GVA/hour	Concept development	Cross-region	All	Business	BLI	Inclusive Growth
Identify and develop tourism action zones for integrated place-based activity, aligned to key target markets. Approach that integrates: natural/cultural capital, transport, skills development and local supply chains	B-HVT 5	TBC	TBC	Tourism Sector Deal	Increase visitor numbers and expenditure	Concept development	Cross-region	To be determined	Business Places	BLI HCI	Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Develop digital immersive experiences	B – HVT3	TBC	TBC	To be determined	Increase visitor numbers and expenditure	Concept development	Cross-region	All	Ideas: Artificial Intelligence & Data Economy	BLI	Distinctive Assets Digital
Support for the workforce	B - HVT 2	See Employment, Skills and Learning Core Offer									
Reinforcing the Capacity of Providers to respond to the Market	B - HVT 2	See Employment, Skills and Learning Core Offer									
Careers Advice and Guidance	B - HVT 2	See Employment, Skills and Learning Core Offer									
Adult Education Budget	B - HVT 2	See Employment, Skills and Learning Core Offer									
Careers Hub / Enhanced Careers Information, Advice and Guidance Provision	B-HVT 2	See Employment, Skills and Learning Core Offer									
Apprenticeship and Traineeship Support Programme	B-HVT 2	See Employment, Skills and Learning Core Offer									
Investing in our natural capital and infrastructure for exploring it	B–HVT 3 B - HVT 5	TBC	TBC	To be determined	Increase visitor numbers and expenditure	Business case development	Cross-region	Rural and Coastal	Places	HCI	Distinctive Assets

Bedrock – Defence (B-D)

Key Opportunities

D&S makes a major contribution to the UK's economy through the protection it provides, by creating and sustaining high-skilled jobs (associated with higher earnings), investing in apprentices, and exporting equipment and services globally. D&S investment has a multiplier effect for UK prosperity and exports (£5.9b in 2016) as well as dual-use innovation, providing a seed bed for new ideas and technology. In 2016, the UK's Defence industry turnover was £23 billion and employed 59,010 across its Joint Services and Civilian workforces in the SW. The HotSW Local Industrial Strategy evidence base reported Defence was the region's biggest contributor to GVA at £1.9b, supporting 37,000 jobs across HotSW. These figures reflect not only the scale of the sector's significance and the economic contribution personnel make, but also the need to further support productivity within D&S. Expenditure with industry and commerce is vital for the region due its enduring role in the provision of in service support to the Royal Navy, including the refitting of Trident submarines and surface warships as well as specialist ship design capabilities. HotSW has unique autonomous systems expertise and is home to major UK Defence Primes with their associated supply chains; providing leading technological developments such as: Babcock's digitisation aspirations and proactive innovation programme; the first unmanned mine warfare system at Thales and Leonardo's rotary wing Unmanned Systems Air.

D&S also inter-links and underpins large elements of our nuclear, aviation, photonics, digital and marine industries. The UKHO and MET Office are indigenous, world leading capabilities providing geospatial data (GD) and intelligence (estimated at £11b a year) and meteorological services. The UKHO is a Centre of Excellence (CoE) in seabed mapping and marine geospatial information, employing over 850 people; data sharing across the globe and unlocking the use of GD to stimulate private sector growth and support government more widely. It has assisted in government strategies such as the Foresight Future of Seas report and International Oceans Strategy. The MET Office provides leading meteorological services aligned to current and future D&S requirements that support UK Defence Mission and Military Tasks. Its supercomputer is one of the most powerful in the world, providing weather and climate intelligence, vital in informing and mitigating climate security risks. HotSW also benefits from 2 leading Universities - Exeter and Plymouth. Exeter's SSI delivers interdisciplinary research and courses in applied 'strategy and security'; MoD Tri-Service Short Courses and Strategic Research & Analysis for the MOD's DCDC. Wider D&S capabilities span geo-political (conflict and security); operational law (cyber, space); functional materials, machine learning and systems optimisation. Plymouth University's Autonomous Marine Systems (AMS) Research Group possess expertise in AI, optimisation techniques and advanced control systems. The region's physical assets include: Devonport's largest naval base in Western Europe with nuclear submarine refitting facilities (the only such facility in the UK); FOST (world CoE); Oceansgate Enterprise Zone and Turnchapel (Thales) supported by Plymouth HEI sector; Plymouth Sound's deep water facilities (essential for trialling unmanned systems); amphibious capabilities with niche design and supply of military vehicles; Leonardo rotocraft operation in Yeovil with its sovereign capability; the Appledore site and MOD infrastructure footprint (bases, barracks etc.). There are four clear strategic growth areas within the sector, all of which fall broadly under the auspices of Industry 4.0 and the Industrial Internet of Things (IIoT): (i) Autonomous Systems and Remote and Automated Systems (RAS); (ii) Cyber Security and secure wireless connectivity; (iii) Human-Machine Teaming – Data, AI and Robotics; and, (iv) High Value Design Capability. Although the HotSW supports a plethora of innovative SME and micro businesses, further support is needed to enable a cohesive regional D&S sector to collaborate, overcome barriers to entry and help supply chains to compete and realise these technologies. The HotSW lacks the benefit of a Catapult centre and has one of the lowest success rates for innovation investment with both DASA and Innovate UK (IUK) confirming the region is underrepresented. The region's geographic location struggles to attract and compete for a sufficient pipeline of talent causing a growing skills gap, particularly in STEM. Additional support is required with exporting and post BREXIT resilience, specifically for foreign owned companies. Our core approach is to:

[B – D&S 1] Invest in and drive new key technology-enabled solutions across land, sea and air, e.g. autonomous systems and security resilience including cyber.

[B – D&S 2] Develop/strengthen collaboration and supply chains to leverage innovation and exploitation into and out of Defence through Primes, SMEs and micro-companies

[B – D&S 3] Grow, diversify, sustain the talent pool skills capability in STEM subjects, data science, AI, digital asset management, supply chain support and management, modelling and sonar.

[B – D&S 4] Drive innovation and technological developments for the region's key Advanced Engineering and Digital priority area capabilities through a Team UK approach.

[B – D&S 5] Strengthen inward investment and trade opportunities

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Sea</p> <p>UK Maritime Autonomy Centre (Plymouth).</p> <p>Summary: Develop autonomous systems & autonomy enablers: big data, AI, digital security & connectivity. Enable rapid exploitation of emergent & disruptive technologies</p>	B – D&S 1	Thales	Universities: Plymouth & Southampton, National Oceanography Centre (NCO)	£1M Thales – 5 year initial commitment	<p>Job creation</p> <p>UK-French joint programme ‘MMMCM’ developing next generation autonomous mine hunting systems</p> <p>Development of 1st unmanned mine warfare system</p>	Opened Autumn’18	Devon	Coastal	<p>Business Place Ideas Infrastructure (IF)</p> <p>Grand Challenges: AI (GC:AI)</p>	BLI	<p>Distinctive Assets</p> <p>Digital</p>
<p>Geospatial Digital Hub</p>	B – D&S 2 B- D&S 3	See Marine opportunity									
<p>Intelligent Systems</p> <p>SW Cyber Security Cluster (SWCSC)</p> <p>Summary: A high profile cyber cluster raising cyber security awareness and best practice.</p> <p>*Regional capability also sits with SW RCCU – ‘Protect & Prevent Programme’</p>	B – D&S1	SWCSC Cluster	<p>Unis: Exeter and Plymouth</p> <p>Devon & Cornwall Police, Crime Stoppers, DCBC, Get Safe Online</p>	Collaboration	<p>Help safeguard businesses against cyber threats</p> <p>Attract regional commercial resources and investment</p> <p>Contributing to the National Cyber Security Strategy in conjunction with Devon & Cornwall Police</p>	Active	All	All	<p>Business Ideas GC: AI</p>	BLI HCI	Digital
<p>Env Intelligence(EI)</p> <p>Big Data Impact Lab</p> <p>Centre for Doctoral Training in Environmental Intelligence and AI</p>	B-D&S 2 B-D&S 4 B-D&S 5	See Big Data Opportunity									

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Institute for Data Science and AI (IDSAI)</p> <p>Summary: Interdisciplinary research institute & hub for data intensive science and AI</p>	B-D&S 4	Exeter Uni	Alan Turing Institute	Exeter Uni, HEFCE	R& D Development Job creation Development of post-grads	Active	Exeter & beyond	All	Ideas IF GC: AI	BLI ESL	Digital Distinctive Assets
<p><u>Personnel</u></p> <p>Team Defence Information (TDI) Joint Professional Development Group</p> <p>Summary: Seeks to establish common methods for recognition and definitions for Defence sector</p>	B-D&S 3	TDI	MOD JFC, BAE Systems	Self-funded	Development of definitions for Defence sector in Support Engineering, Supply Chain Management & Integrated Support Management competencies	Active	UK	All	Business Ideas People	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p><u>Sea</u></p> <p>Geospatial Centre of Excellence</p> <p>Summary: Regional test bed utilising existing MOD assets to develop high growth technologies</p>	B-D&S 2 B-D&S 5	Thales	MET Office, UKHO + possible connection to UOE IDSAI	SW Sector Deal Discussions	Increase export and international trade Supply chain development Facilities access to SMEs for product development	Discussed with BEIS/MOD	SW & beyond	All	Business Place Ideas	BLI	Digital Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
UK Marine Autonomous Innovation Centre Summary: CoE for autonomous navigation	B-D&S 1 B –D&S 2 B- D&S 3 B – D&S 4	UKHO	Geospatial Commission and Others (TBC)	Look to use existing physical infrastructure	Marine autonomous navigation ready	Business case submitted - response due Q4 FY 18/19	UK /global	Coastal (Devon)	Business Place Ideas	BLI HCI	Distinctive Assets
<u>Air</u> Advanced Materials R&D Centre for Excellence to support future Aerospace and Maritime sectors.	B-D&S 1 B-D&S 4	Exeter Uni	Thales, Leonardo, TCS, + Dstl, QinetiQ, NPL	TBC, exploring at present. Could link to IDTC	Enable rapid design, prototype, trial and test of new materials for military application	Existing R&D collaboration at Exeter with opportunities to link up	SW	All	Business Ideas	BLI	Distinctive Assets
<u>Intelligent Systems</u> Cyber SHIP Lab Combining maritime technology with leading thought on cyber-security for maritime application	B-D&S 1	Plymouth Uni	TBC	TBC	Provision of test facility for ship security hardware including a physical and synthetic ship's bridge. Providing a focal point for businesses to engage and improve info protection & resilience to cyber-attacks	Due 2019	Plymouth & beyond	Coastal	Business Ideas	BLI	Distinctive Assets Digital
V-Simulators Summary: State of the art simulators enabling realistic <i>human factor simulation</i>	B-D&S 2	Universities: Exeter, Bath Leicester Partners: Atkins, AKT II, WSP, DNEC, Swallow,	<i>Partners cont:</i> Thornton Tomasetti, Burohappold Engineering, Foster + Partners, flint neil, ARUP, CTi Engineering, Waterman	£4.8m EPSRC Grant	Facility available to researchers, industry and practitioners both as a research and training tool	Bath opened Aug 2018 Exeter Science Park due to open Aug 2019	SW	All	Business Ideas	BLI ESL	Distinctive Assets Digital
<u>Environmental Intelligence Accelerator</u>	B-D&S 4 B-D&S 5	See Big Data opportunity									

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Industrial Digital Technology Centre (IDTC)	B - D&S 1 B - D&S 2 D - D&S 4	See Aerospace Opportunity									
<u>Personnel:</u> Suggestion: Map HotSW military labour force *Shared MOD priority (Def Industrial Policy) - Collection of information and statistics for UK D&S sector	B-D&S 3	HotSW LEP	HotSW LEP MOD - SO2 Veterans and Transition	Government	Report outlining military labour force and economic impact in HotSW. Report identifying challenges faced in employment, transition and retention of skilled personnel in the region	For consideration	HotSW	All	People	BLI ESL	Inclusive Growth
<u>Development Opportunities</u> Suggestion: Map HotSW D&S businesses. Profile for a generic and granular (niche) capabilities	B-D&S 2 B - D&S 5	HotSW LEP	Other SW LEPs, IUK, D&S KTN	Government	Outputs: Report outlining supply chain capabilities, challenges and required investment areas. *Shared MOD priority – supply chain awareness	For consideration	HotSW	All	Business	BLI	Inclusive Growth Distinctive Assets

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Collaboration - HotSW/SW D&S Cluster</p> <p>Summary: a mechanism to enable collaboration and develop a more clearly defined, visible and cohesive HotSW/wider SW D&S cluster, providing strategic value/collective growth (increased GVA + FTE) & a sector voice</p> <p>*Collaboration is a shared MOD priority</p>	<p>B – D&S 1</p> <p>B-D&S 2</p> <p>B – D&S 4</p>	<p>HotSW D&S PDP T&F Group + wider D&S Stakeholder (Regional D&S Cluster for short)</p> <p>HotSW LEP</p>	<p>UKHO & MET Office (UKMO) Int. Defence team, DASA, DIT, IUK</p>	<p>BEIS, DASA, IUK, Dstl (Searchlight)</p> <p>HotSW LEP</p>	<p>Act as an anchor for national bodies support: DASA, IUK, government.</p> <p>A defined regional group to lobby government</p> <p>Support managed access to leverage Primes + world leading capabilities eg UKMO, UKHO.</p> <p>Develop a regional D&S ‘investment offer’ & grow collaborative consortia</p>	Needs to be worked up	All	All	<p>Ideas</p> <p>People</p> <p>Business</p>	BLI	<p>Inclusive Growth</p> <p>Distinctive Assets</p> <p>Digital</p>
<p>Business Innovation + Growth</p> <p>1. Dstl SME Searchlight</p> <p>Summary: Innovation workshops to support MOD</p> <p>*Innovation – Shared MOD priority</p>	<p>B-D&S 1</p> <p>B – D&S 2</p> <p>B – D&S 3</p> <p>B – D&S 4</p> <p>B – D&S 5</p>	DASA	<p>Exeter & Plymouth Unis, C&IoS LEP, HotSW LEP, DSTL, British Army, Royal Navy, Royal Airforce, Joint Forces Command, DE&S</p>	<p>Dstl Searchlight + Venturefest?</p>	<p>Proposal for DASA to work with TDI, ADS, and TechUK to engage SMEs and Defence Primes to address the MOD innovation agenda.</p>	In planning	The South West	All	<p>Ideas</p> <p>People</p> <p>Business</p> <p>Environment</p>	<p>BLI</p> <p>ESL</p>	<p>Inclusive Growth</p> <p>Distinctive Assets</p> <p>Digital</p>

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Business Innovation + Growth 2. SME/Micro entry+ scale-up Summary: Support entry and scale up of innovative SME/micro-businesses into D&S sector. Link to HotSW D&S Business mapping	B- D&S 1 B – D&S 2 B – D&S 4	BAR Associates	HotSW LEP Regional D&S Cluster IUK Xi Programme DASA	Government Productivity Tenders (IUK) £60K POC; £400k Business-led trials	Increase awareness of D&S opportunities to Micro/ SME group Grow D&S supply chain to increase SW GVA+FTE Prepare SMEs to become 'business ready' to on-board Prime supply chain	Being scoped	All	All	People Business	BLI	Inclusive Growth
Business Innovation + Growth 3. National Security Accelerator Programme Summary: Delivery of a tailored programme to innovators well aligned to National Security capability	B-D&S 1 B – D&S 4	BAR Associates	BAR's Associates Network, TDI, Corporates	Investors (Angel, PE, VC, CVU), BEIS Catapults, LEP DASA, Vivace (Home Office)	Providing bus. with D&S domain expertise; strategic management improvement for solutions + long term collaboration Develop GVA/FTE, supply chain sustainability	Being Scoped *Link to Dstl SME Searchlight	All	All	Ideas People Business Environment	BLI ESL	Inclusive Growth Distinctive Assets Digital
Business Innovation + Growth 4. List-X Facilities Summary: Creating a safe space for companies to work with classified data. Nurturing exploration of traditionally non-D&S technologies and modifying for dual-use	B- D&S 1 B – D&S 2 B – D&S 4 B – D&S 5	(TBC) Exeter Science Park (TBC) Thales Plymouth	Exeter and Plymouth Unis, LEP, D&S Primes	Exeter S. Park, Thales (TBC)	Access to facilities to encourage new dual-use technology enabled products, services and applications for D&S and adjacent markets Increasing numbers of SMEs /Micros accessing D&S opportunities	In planning/ consideration	HotSW & Wider SW	Urban	Ideas People Business	BLI ESL	Inclusive Growth Digital

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
<p>Business Innovation + Growth</p> <p>4. Leveraging future talent pipeline</p> <p>Summary: Experiential learning supporting long term sustainable SME growth. Nurturing bus. throughout the growth journey - drawing on STEM/Business School capabilities</p>	<p>B- D&S 3</p> <p>B – D&S 4</p>	<p>TDI, Exeter Uni</p>	<p>C&IoS LEP, HotSW LEP, IUK KTN, Regional D&S Cluster</p>	<p>TBC</p>	<p>Provision of Business Coaching & added value projects – match bus. Challenges with pipeline of well-defined student dissertations / projects</p> <p>On-going student Mentoring Programme (employability). Building Service support capabilities to front line commands – supporting customer assets</p>	<p>In planning</p>	<p>Cornwall and Isles of Scilly, Devon, Somerset, Dorset</p>	<p>All</p>	<p>Ideas</p> <p>People</p> <p>Business Environment</p>	<p>BLI</p> <p>ESL</p>	<p>Inclusive Growth</p> <p>Digital</p>
<p>Procurement</p> <p>Summary: Discuss with MOD local procurement strategy, accessing 19 key Prime suppliers following DE&S KSM procurement process – supporting HotSW businesses to win contracts & promote visibility of their capabilities</p> <p>*Shared MOD priority. *Link to Collaboration</p>	<p>B- D&S 2</p> <p>B – D&S 5</p>	<p>DCO (Supplier Portal) TDI, ADS, DE&S, Defence Supplier Forum, DTech, DASA, IUK D&S KTN</p>	<p>LEP , Regional D&S Cluster</p>	<p>SME Engagement” programme (MoD, BEIS)</p>	<p>Delivering capability into Defence users & supporting associated supply chain processes</p> <p>Aid commercial agility and pace in procurement whilst considering implications of UK sovereignty & Def driver to award 33% of contracts to SMEs by £(m) value</p>	<p>Needs to be worked-up</p>	<p>All</p>	<p>All</p>	<p>Business</p>	<p>BLI</p>	<p>Distinctive Assets</p>

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Potential Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Export + Inward Investment Summary: Establish effective, tailored programme of support for SMEs through DIT/DSO and UK Defence Solutions Centre (UKDSC) *Shared MOD priority – UK	B- D&S 1 B – D&S 2 B – D&S 4 B – D&S 5	DSO (DiT incl Export Support Team (MoD)	Regional D&S Cluster	DiT and UKDSC and Home Office	Leverage DiT/DSO industry relationships to increase exports (UK currently 2 nd (Def) & 5 th (Security) largest exports – DiT/DSO/UKDSC)) Exploit known capability gaps with International Partners and encourage inward investment	Routine marketing support services offered by DiT (Market analysis, Trade Missions)	All	All	Business	BLI	Distinctive Assets Digital

Bedrock – Construction (B-C)

Key Opportunities

Nationally, construction reaches every part of the country; it underpins our economy and our society. It is fundamental to our future, from the schools our children attend to the houses we live in; from the offices and factories we work in to the transport networks we use to get there. Construction, encompassing all three main subsectors (commercial and social, residential and infrastructure/civils) is an enabling sector and will shape our future!

Across the South West, the construction sector remains a key employer but the likely shortfall in required skills is well known. Circa 70,000 are employed in the construction industry across HotSW LEP area with the sector contributing £9.8bn to the regional economy. The Construction Industry Training Board (CITB) forecast of February 2019 estimates that construction in the South West is set to grow at an annual rate of 2.2% from 2019 – 2023, almost double the UK's average of 1.3% and making it one of the best performing areas of the UK. The report also forecasts over 27,000 new jobs in the construction industry are likely to be created over the same period, reflecting ongoing growth within the sector through to the turn of the next decade. However, the implications of Brexit on these growth assumptions and labour requirements remain uncertain. There are several factors driving this growth locally including Hinkley Point C ("HPC") (the largest civil engineering project in Europe) as well as a wave of renewed growth across the LEP, with several other major projects stimulating demand (development at Cranbrook and across the Exeter Growth area, Plymouth's regeneration approach and renewed capital expenditure programmes in Somerset and Torbay). These projects have the potential to shape our economy, driving our productivity, creating new jobs and developing skills in the industry. Adding to this demand, the Government also committed itself to building 300,000 new houses across the UK per year in the 2011 Budget. In addition to the demand above, we have innovation assets within our universities which have research teams exploring sustainable construction techniques, engineering, materials, construction techniques and new technologies.

As an enabling sector, construction underpins much of our core activity and our planned growth across the HotSW area. Only with a strong growing construction sector can we deliver our capital projects, drive up our productivity and realise our full economic potential. The Construction Industry has already agreed a Deal with government which sets out how the industry will transform the sector. Within HotSW our priorities are aligned with the Construction sector deal and our core approach is as follows:

[B - C1] Ensuring effective intelligence for the sector to influence wider policy and delivery activities

[B – C2] Creating a talent pipeline drawing from both young people in the education system and adults already in the workforce

[B – C3] Up-skilling the existing construction workforce to support all aspects of the industry

[B – C4] Preparing for the future through digital, innovation and supply chain development, capitalising on construction projects in the area

Current Activity	Outcome	Lead	Key Partners	Funding	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Building Plymouth	B – C2 B – C3 B – C4	PCC	Public and Private sector National Skills Academy Construction	LA and contributions	Connecting people to jobs and careers. Raising the profile of the sector as a career of choice for residents. Application of Adopt a School initiative for platform of school engagement by employers with schools.	On-going	Plymouth	Urban	People	ESL	Inclusive Growth
Somerset Talent Academy Programme	B – C2	SCC	Private Sector Schools CITB	£1,600 per cohort Potential ESF funding	Support delivery of Gatsby Benchmarks (employer engagement) -12 students involved in each cohort	Pilot run in West Somerset in 2018/19; second cohort running in 2019/20 Cohort running in East Somerset in 2019/20	Somerset	All	People	ESL	Inclusive Growth
Research exploring Construction Careers Information, Advice and Guidance	B- C1	Constructi on Skills Group	Local Authorities	?	Report and recommendations produced	Complete. Successfully informed delivery of the Careers Hubs (See below)	HotSW	All	People Business	ESL	Inclusive Growth
Careers Hub / Enhanced Careers Information, Advice and Guidance Provision	B – C2	See Employment, Skills and Learning Core Offer									

Research: Tackling replacement demand in the Construction Sector	B – C1	University of Exeter	REPLAY-VET	Co-funded by Erasmus+	Detailed analysis of the low-skilled workforce and sectoral analysis into opportunities	Complete July 2018	HotSW	All	People	ESL	Inclusive Growth
Building Greater Exeter	B – C2 B – C3 B – C4	Exeter City Council	Private Sector contributors , Exeter City Council, Teignbridge and East Devon District	Variable depending on contributions to the project	Supporting the construction sector across Exeter and East Devon to address skills and recruitment challenges	On-going	Exeter, Teignbridge and East Devon	Urban and rural	People	ESL	Inclusive Growth
Investment in 5FE colleges and National College for Nuclear	B – C2 B – C3	See Nuclear opportunity									
Hinkley Point Training Agency established	B – C2 B – C3	See Nuclear opportunity									
Under construct	B- C1 B- C2 B- C3 B- C4	Sedgemoor District Council	CITB	Not funded - SDC employee	Connecting people to careers in Sedgemoor, upskilling of construction workforce	On-going	Sedgemoor	Rural	People Business	ESL	Inclusive Growth
Constructing Excellence SW	B-C1	Andrew Carpenter	CESW Members	None	Production of the following guides: procurement, development finance, mediation and legal	All available via CESW website	National	Total	People and business	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Skills Advisory Board	B - C1	See Employment, Skills and Learning Core Offer									
Apprenticeship and Traineeship Support Programme	B - C2 B - C3	See Employment, Skills and Learning Core Offer									
Adoption of the Client Based Approach (CBA) as a tool for achieving outcomes above	B- C3	LEP	LAs, CITB	£42k per annum to support role to implement CBA	Support provided to LA's to implement CBA	To be developed following revisions to CBA model by CITB	HotSW (some areas have already implemented)	All	People Business	ESL BLI	Inclusive Growth
Flexible support fund for hard to fill vacancies (linked to higher level skills)	B - C2 B - C3	Construction Skills group	Private sector, FE, HE	£500,000 per annum Sources include: ESIF, UKSPF and Levy	Support to help develop new provision to address skills gaps	Concept development	HotSW	All	People	ESL	Inclusive Growth
To secure and develop construction skills hubs across the HotSW	B - C2 B - C3	Construction Skills Group	CITB, training providers, FE, HEI, private sector	TBC Potentially funded through CITB	On-site training and up-skilling through training and on-site experience targeted at main skills gaps/future skills needs	Awaiting funding opportunity through CITB, anticipated release date May 2019	HotSW	All	People Business	ESL	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Supply chain development – building on good practice in nuclear opportunity	B – C4	Construction Skills Group	CITB, Nuclear SW?	TBC Potentially funded through CITB	Build the skills, knowledge and capability of the supply chain through a programme of support targeted to benefit SMEs	Concept development SME Growth event confirmed for UWE 25 th June; Pilot project taking place in WECA. Potential wider roll out. Exploring current HBSP model focusing on subcontractor network across the housing sector – potential for roll out in HotSW	HotSW	All	Business	Business	Distinctive Assets
Support for leadership and management within the construction sector	B – C3	Construction Skills Group	CITB, FE, HEI, private sector	Tbc Potentially funded through CITB	A bespoke support programme designed to improve the L&M skills in the sector	Concept development	HotSW	All	Business People	BLI ESL	Inclusive Growth
Develop a programme of outreach and employment support for the sector, including promotion, pop-up job shops, supporting ex-service personnel and adult re-skilling, building on a review of current initiatives	B- C2	Construction Skills Group	TBC	£300,000 per year	Development of pipeline from people who are unemployed, underemployed or not in work	Concept development Awaiting CITB board proposals for national programme of funding and activities to support L&M; anticipated September 2019 Digital commission expected to focus on L&M; anticipated April 2019	HotSW	All	People Business Places	ESL BLI	Inclusive Growth

Proposed Future Activity	Outcome	Lead	Key Partners	Funding & Delivery Options	Deliverables	Current Status	Coverage	Across HotSW	Industrial Strategy Theme	Productivity Strategy Theme	Cross Cutting Theme
Research to identify barriers to employment within the industry (including post Brexit labour scenarios)	B – C1	Construction Skills Group	CITB National Research Programme	TBC	Understanding barriers to entry	Concept development Currently awaiting successful bids to CITB Pathways Commission; anticipated April 2019	HotSW	All	People	ESL	Inclusive Growth
In-work up-skilling programme (Support the Workforce Programme?)	B – C3	See Employment, Skills and Learning Core Offer									
Technical Skills for the Workforce	B – C3	See Employment, Skills and Learning Core Offer									
Rolling Labour Market Intelligence	B – C1	See Employment, Skills and Learning Core Offer									
Maximising use of digital technology in the construction sector	B – C4	Digital Skills Partnership	TBC	TBC	Increased use of digital technologies	Concept development CITB digital commission April 2019	HotSW	All	Business	BLI	Digital
Maximising use of sustainable construction techniques	B – C4	TBC	TBC	TBC	TBC	Concept development	HotSW	All	Business	BLI	Distinctive Assets
Collate project pipeline of each LA/public sector projects to understand skills demand in the short med and long term	B- C1 B – C2 B – C3 B – C4	CSG as Champion	LA,s HotSW LEP, Planning and Procurement	Application of the role of CBA can be used for some of this approach	Clear vision of projects over the LEP area Extraction of social value from contracts and reinvest in activity to support activity	In development	HotSW	As above	Place, Business People	BLI	Inclusive Growth

