Strategic
Economic Plan for
Gloucestershire

gfirst LEP
growing gloucestershire

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Foreword

Gloucestershire is a county with world-class companies, a diverse economy and a reputation for starting and growing great businesses.

It's also a county with a rich and varied natural environment, known for its culture and heritage and for its quality education establishments – these are just some of the reasons why people choose to live and work here. With landscapes like the internationally renowned Cotswolds and the Forest of Dean as a backdrop to business, we want to make sure that what is special about Gloucestershire stays special.

I have a business background and a passion for Gloucestershire. My aim as Chair of GFirst LEP has always been to develop what is, in effect, a business plan for growth for the county. Our task has been to produce a Strategic Economic Plan for government and this document incorporates everything – and more – that government requires of us.

However, the market for this plan is also much wider - the business community and citizens of Gloucestershire to whom we are accountable. We have engaged with our business partners and we speak their language. That is why this document reads like the sort of business plan many will have in place for growing and developing their own companies.

We recognise that, given the current financial state of UK plc, difficult choices must be made by central government and, as a consequence, we must temper our expectations with realism. We would urge Government to go as far as possible in adopting Lord Heseltine's No Stone Unturned proposals to push more funding to local economies in the coming years.

Nonetheless our business plan has ambition and drive; stretching goals; and supporting evidence to satisfy the most testing of challenges. We believe that, with the right support and funding, it holds the key to achieving successful growth in Gloucestershire.

Dr. Diane Savory OBE

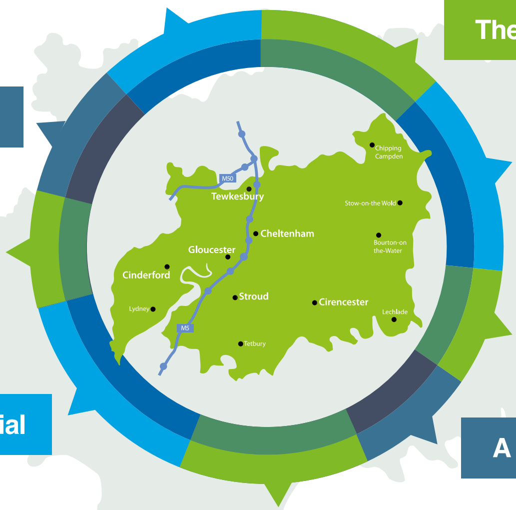
1. Introduction

‘We will create an environment in Gloucestershire that tells the world we’re open for business and the county of choice for exceptional high performance companies. This plan will send that message.’ David Owen, Chief Executive GFirst LEP

Gloucestershire is a great place to live and work, with the potential to exploit several significant opportunities and build on our considerable strengths.

For example:

- A resilient broad-based economy
- The nuclear and renewable energy industry
- A high quality natural environment
- The potential of the M5 motorway corridor
- A high level of start-ups and start-up survivals
- Availability of sites
- Businesses in growth sectors with export potential
- A joint approach to planning
- A strong partnership between education and business



We have a clear focus

Our plan will accelerate economic growth and address the particular challenges we face, specifically:

- Our productivity challenge;
- Our ambition to support the growth of knowledge-intensive sectors;
- Exploiting the export potential of our SMEs;
- The need for innovation to be a stronger driver of productivity;
- Capitalising on our entrepreneurial culture;
- Developing better links between education and business, and attracting and retaining our talented young people;
- Ensuring a ready supply of skilled workforce to support the growth of key sectors;
- Supporting our rural economy;
- Improving our broadband and mobile phone network coverage;
- Gaps in business support including lack of knowledge of how to access those services;
- Resolving infrastructure issues and bringing sites forward.

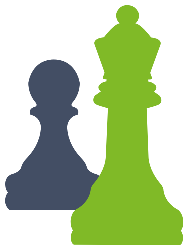
1. Introduction

We have set ourselves ambitious targets:

- **33,909** jobs created and **2,125** protected;
- **3,200** new houses;
- **6,108** qualifications and **5,421** apprenticeships;
- Highways Agency contribution of £302m;
- Other public sector contribution of £43m;
- Private sector leverage of £157m;

Over the period 2015-2021 and as a direct consequence of the interventions within this Plan, we will grow Gloucestershire's economy by £493m;

The process for developing this strategy has involved:



- Drawing on detailed evidence and analysis;
- Reviewing national and local strategies to ensure alignment of Gloucestershire priorities;
- Extensive consultation with a wide range of Gloucestershire stakeholders.
- Identifying key drivers and barriers to growth;
- Addressing key market failures.

Our ask of government

In summary, we seek **£52m** funding from the Single Local Growth Fund in order to:-

- **Leverage funds from private sector, public sector and the EU;**
- **Deliver against our targets;**
- **Achieve economic growth for Gloucestershire.**

"Our message is clear and simple."

Although we are a prosperous economic area with huge latent potential we need help in unlocking that potential in order to achieve the type of economic growth that the whole country should aspire to - high skill; knowledge-intensive; sustainable; a high proportion of manufacturing and export industries; and offering an exceptional quality of working life.

Investment in Gloucestershire will unlock our potential and in doing so help to rebalance the economy of UK plc by bringing some of the economic weighting out of London.

With the funding to deliver against our plan, and a location that is second to none, we have an unbeatable recipe for success that will deliver against our growth target.

1.1 Gloucestershire

The character of Gloucestershire

Gloucestershire is the northernmost county in the South West region, comprising six districts – Cheltenham, Gloucester, Forest of Dean, Cotswold, Stroud and Tewkesbury. It has been a significant location for commerce since Roman times, located at a cross roads between Wales and London and the West Midlands and the South West.

The economy of Gloucestershire has four main characteristics:-

- Two urban clusters - Cheltenham and Gloucester – containing the key urban settlements and the main business, commercial, educational, service and cultural centres;
- The northeast-southwest commuter belt following the path of the M5 motorway;
- A rural aspect with pockets of retirement areas and attractive rural settlements;
- A number of market towns acting as employment hubs and providing services for resident communities;

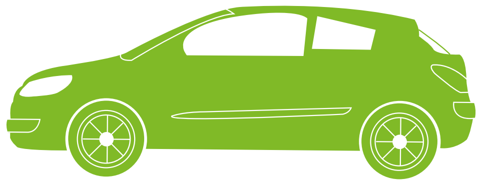
The M5 motorway has a significant impact on the county. It is the main economic artery and enables easy access to work, amenities and leisure, which is reflected in the associated commuter belt extending beyond the county border. Gloucestershire is self-contained in terms of travel to work with some 88% of the resident population living and working in the county.

A growing population

Total population in Gloucestershire at the time of the last census in 2011 was 597,000, which increased by 32,300 (5.7%) from the previous census in 2001. This rate of growth was below the England and Wales average of 7.8% during the same period because of a smaller increase in children, young people and the working-age population compared to England and Wales. [1]

Gloucestershire has a high proportion of people aged 65+ compared to England and Wales (18.6% compared to 16.4%). The population is also ageing; ten years ago the proportion of over 65 year olds in the county was 17.4%.

Looking at the movements of various age groups, between 1991 and 2008 there was a net inflow of people aged between 30 and 44 years and children less than 15 years of age.[2]



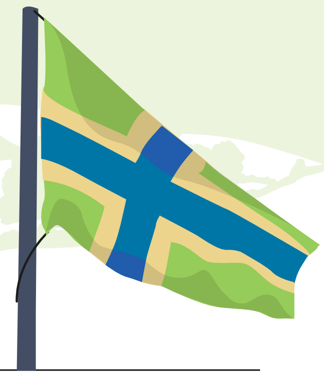
Some 88% of residents in Gloucestershire also work in the county, a situation that has hardly changed since 2001.

Nearly twice as many people travel from Gloucestershire to Bristol than make the reverse journey and the picture is the same for Swindon. The county is also an important employer of workers from Worcestershire.

There is considerable localised commuting within Gloucestershire, highlighted by a comparatively high proportion of Forest of Dean residents travelling to Gloucester to work.

'Growth in Gloucestershire is underpinned by a natural environment that's home to some of England's most iconic landscapes.'

Roger Mortlock, Chair of Gloucestershire Local Nature Partnership



1. Gloucestershire County Council (2012) Gloucestershire Population Monitor July 2012
2. Mid-2008 ONS Annual Population Survey estimates.

1.1 Gloucestershire

A prosperous and resilient economy…

Gloucestershire has a prosperous and resilient economy set within a highly attractive natural environment, which offers a high standard of living for local residents. There are approximately:

supporting a workforce of
291,500[3]

On many of the headline indicators of economic performance, Gloucestershire performs at, or above, the national average. The UK Competitiveness Index uses a basket of indicators to rank the 39 LEP areas and the 2013 Index places Gloucestershire as the 11th most competitive LEP in the country.[4]

Similarly, Experian's Resilience Index placed Gloucestershire 9th most resilient LEP.[5]

Total output of the economy was approximately £12.7 billion in 2012, representing 12% of the value of output in the South West and 1% of the UK economy.[6]

According to latest figures, GVA per head in Gloucestershire is £21,066, on a par with the UK (£21,674) but above the South West average (£19,023).[7]

….and sectors with high growth potential

We are in the top three LEPs for employment within knowledge intensive manufacturing and services; we have the highest percentage in all LEP regions of employees in high and medium technology manufacturing and an abundance of SME's in cyber security and creative industries, including digital, all of which have high growth potential; and for some businesses there is capacity for significant expansion in export.

…but evidence that growth has slowed

While the economy is strong and there are major opportunities for expansion, there is evidence that economic growth has slowed in Gloucestershire in recent years relative to the rest of the UK. We have looked at rates of growth in GVA achieved in Gloucestershire during the pre and post-recession years in comparison with other areas and nationally[8]:

- Between 1997 and 2011 (14 years) the average percentage growth rate in nominal GVA was 3.8% compared with the national rate of 4.3%;
- In the run-up to the recession – 2002 to 2008 - the annual average percentage change for Gloucestershire was 3.5% - lower than the national figure of 5.2%;
- In 2010-2011 (1 year) the growth rate for Gloucestershire was 2.3% - close to the national rate of 2.4%;
- In terms of growth over the period 2002-2008, Gloucestershire is in the bottom third of all local and unitary authorities in the country.

For this reason, we have set a bold target in our Strategic Economic Plan to achieve growth above the national average, and ambitious plans to realise that target.

3. South West Observatory, GFirst LEP Economic Profile.

4. UK competitiveness index 2013, sourced from University of Exeter/Marchmont (2013) Gloucestershire Skills Plan Evidence Based Report. Indicators relate to productivity, labour market and business performance.

5. Sourced from the LEP Network (2012). More resilient economies are associated with higher levels of entrepreneurship; a larger presence in less vulnerable sectors; higher levels of educational attainment and labour market participation; higher levels of life expectancy; and better living environments.

6. ONS (2013) Regional Gross Value Added (Income Approach) NUTS3 Tables.

7. Ibid.

8. http://bit.ly/1pB4ozj

The productivity challenge

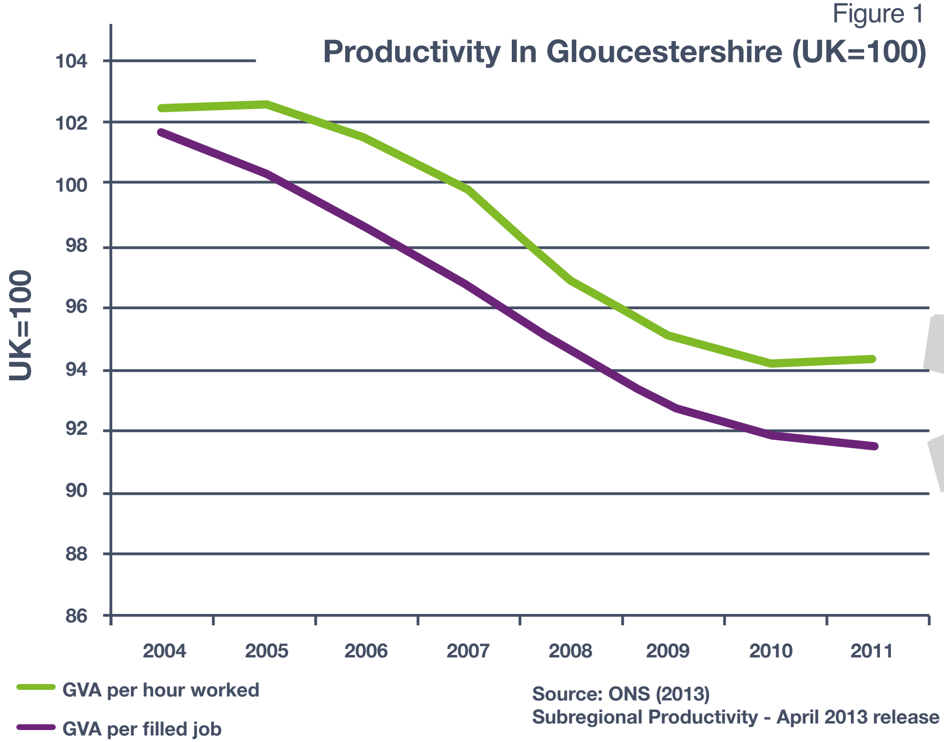
The slowing of output growth is reflected in data on productivity. ONS recommends the use of GVA per hour worked or GVA per filled job to assess productivity performance.[9]

Examining these indicators, there is evidence that productivity has stagnated relative to the rest of the UK. GVA per hour worked in Gloucestershire increased from £22.70 in 2004 to £25.70 in 2011 but over the same period, the national increase was from £22.30 to £27.30. This graph shows how Gloucestershire's position relative to the UK has therefore fallen year-on-year to 2011. This trend is confirmed by data on GVA per filled job. Today, GVA per filled job (£39,726) is around 8% lower than the UK (£43,236).

We believe that part of this productivity challenge also directly relates to a need to up-skill our workforce.

Figure 1

Productivity In Gloucestershire (UK=100)



Source: ONS (2013)
Subregional Productivity - April 2013 release

9. http://bit.ly/1pgG9bm

1.2 SWOT

This is the most current SWOT analysis undertaken in preparation of the SEP; some of the Appendices accompanying this report also contain SWOT analyses but these pre-date and are superseded by the version shown here.

Strengths

- High employment rate;
- High economic activity rate;
- Diverse, resilient economy;
- High concentration of high tech manufacturing firms;
- Expertise in the nuclear and renewable energy industry;
- High quality natural environment;
- High standard of living;
- High levels of self-employment and start-ups;
- High business survival rates;
- Highly skilled workforce;
- Vibrant SME community;
- Entrepreneurial culture;
- Strong partnership between education and business;
- Low % of NEETs;
- University of Gloucestershire and Royal Agricultural University;
- High levels of self-containment;
- Gloucestershire Airport and major international airports in close proximity;
- Access to national motorway network;
- GCSE success rates above national average;
- High General and Applied A/AS or equivalent level success rate.

Weaknesses

- Low recent levels of economic growth;
- Low productivity relative to the UK;
- Under-representation in knowledge-intensive services;
- Under exploited export potential;
- Pockets of county with persistent deprivation and high unemployment;
- Gaps in high speed broadband coverage in rural areas;
- Gaps in reliable mobile phone network coverage;
- Barriers to services in rural areas;
- Low average number of patents per head;
- Failure to retain our talented young people;
- Gaps in business support and lack of knowledge of how to access services;
- High car dependency;
- High levels of commuting within the county;
- Congestion problems around A417 – The 'Missing Link' [10]; A46 Tewkesbury to M5; A40 to west of River Severn; A40 between Gloucester and Cheltenham; Cheltenham and Gloucester centres;
- Limited direct train services to London
- Relatively high house prices a barrier to first time buyers entering the property market.

Opportunities

- Export potential; including within Tourism
- Growth in knowledge-intensive services;
- Nuclear energy;
- Low carbon economy;
- Agri-technology;
- Tourism;
- Creative industries including digital media;
- Projected growth in number of households;
- Entrepreneurial culture;
- Innovation assets – University of Gloucestershire, Royal Agricultural University, and key businesses;
- Extension of high speed broadband and mobile phone network coverage;
- Planned investment in infrastructure;
- Improved direct train services to London;
- Land availability near M5 Growth Zone.

Threats

- Declining productivity relative to the UK;
- Lack of suitable premises for high value businesses;
- Young people leaving the area;
- Increase in youth unemployment since the recession;
- Increase in long-term unemployment since the recession;
- High proportion of employment in the public sector;
- Average innovation performance;
- Under-developed links between business and universities;
- Ageing population, particularly in rural areas;
- Forecast decline in employment in the Forest of Dean;
- Forecast decline in manufacturing and wholesale employment;
- Skills gaps and shortages in some sectors;
- Rising energy prices;
- Impact of climate change, esp. flooding;
- Insufficient number of attractive development sites.

10. The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

For more information about how we plan to exploit our Opportunities and address our Threats, go to section 3.

1.3 Developing clear strategic priorities

The journey to here….

In April 2013 we published our Growth Statement to introduce the background thinking and basis for the development of a Growth Plan for Gloucestershire in line with the Government's National Growth Strategy.

A link to our Growth Statement can be found in Section 2.2

Our Growth Statement was developed around three key components:

Skills

Providing a highly employable and economically productive workforce that meets the needs of local business, particularly in high value growth sectors;

Promotion

Attracting and retaining successful businesses in high value sectors and the next generation of talented workers;

Connection

Exploiting the opportunity presented by the motorway corridor to enable faster economic growth and providing the transport infrastructure and comprehensive high speed broadband coverage to accelerate growth.

More information about our Engagement with businesses can be found in section 7.

The business engagement process

Our consultation with the business community of Gloucestershire was undertaken through our eleven Sector Groups, and a series of Focus Groups and Task & Finish Groups. This resulted in development of Plans for Growth around three key flagship projects.

This consultation resulted in development of Plans for Growth around three key flagship projects:-

GLOUCESTERSHIRE growth hub

The Growth Hub will provide a range of innovative and tailored services to support companies with high growth potential and encourage individuals with an entrepreneurial spirit to consider self-employment, apprenticeships, and other alternative employment routes.

GREEN

We will establish a Gloucestershire centre of excellence in Renewable Energy, Engineering & Nuclear skills (GREEN) in anticipation of the unprecedented expansion of nuclear, low carbon energy, and engineering in Gloucestershire and the South West.

GLOUCESTERSHIRE growth zone

The Growth Zone will ensure the availability of quality employment land in proximity to the M5 motorway attractive to businesses and with excellent connectivity throughout Gloucestershire and to the rest of the UK.

GLOUCESTERSHIRE enablers for growth

In addition there are a number of other projects, predominantly but not exclusively transport related, which will complement and enable growth at our three flagship projects.

1.4.1 Flagship projects

'The Growth Hub should be the 'go to' place for any business with ambitions for growth'.

Roman Cooper, CEO, Allcooper Ltd. (security systems company, Gloucester)

The Growth Hub will provide a range of innovative and tailored business services designed to boost the development of companies with high growth potential, increase exports, and fast-track entrepreneurial start-ups. It will also encourage development of an enterprise culture in the county's schools, colleges and universities by inspiring more young people to consider alternative career paths such as self-employment and apprenticeships, and providing support to those with an entrepreneurial spirit to encourage development of their business ideas.

Plans for the first phase of the Growth Hub have already been launched by GFirst LEP and the University of Gloucestershire working in partnership, and have secured national backing with a £2.7million investment from the Higher Education Funding Council for England.

The Growth Hub is consistent with BIS/Cabinet Office models[11] for growth and will include:

- An **Accelerated Business Growth Service** providing the knowledge and support to those businesses with high growth potential, including export.
- An **Enterprise Accelerator** delivering significant improvement in STEM (Science, Technology, Engineering and Mathematics) awareness, apprenticeship uptake, graduate retention, and start-up activity in younger entrepreneurs.

Networked across the county via resource centres (or spokes) these services will firmly establish close links between the business and education sectors.

11. Growth Hubs and Partnerships: An improved business support offer. Karen Leigh, Assistant Director, Growth Hub Implementation Strategy at Department for Business, Innovation & Skills. December 2013

The broad range of services offered by the Growth Hub will directly address some of the key obstacles to growth in Gloucestershire by:-

- Providing a comprehensive range of targeted support to businesses with high growth potential;
- Establishing a clear alignment of the business and education sectors;
- Raising standards across the county in relation employability skills and qualifications.

As a result our high growth potential businesses will achieve their latent potential and we will have a ready supply of talented employees with skills relevant to Gloucestershire businesses, and be developing the local entrepreneurs of the future.

The importance of tourism to Gloucestershire from both an economic and an employment perspective is considerable.

We plan to support the tourism sector through our Growth Hub proposals where tourism businesses with high growth potential will be able to access appropriate support.

More information can be found in section 4.1.1.

1.4 Plans for Growth

GREEN

'We are in a global race and the countries that succeed in that race, the economies in Europe that will prosper, are those that are the greenest and the most energy efficient'

David Cameron MP, Prime Minister
Energy Efficiency Strategy 2013

In partnership with South Gloucestershire and Stroud College we propose establishment of a Gloucestershire centre of excellence in Renewable Energy, Engineering & Nuclear skills (GREEN) at the decommissioned Berkeley power station in anticipation of the unprecedented expansion of nuclear, low carbon energy, and engineering in Gloucestershire and the South West.

In outline this project will:

- Provide a centre for STEM (Science, Technology, Engineering & Maths) skills delivery in anticipation of the unprecedented expansion of Nuclear and low carbon engineering in Gloucestershire and the South West region;
- Provide an immediate rapid expansion of engineering skills training from September 2015 for young people and apprentices, satisfying the already huge demand from Gloucestershire businesses;
- Provide the capacity on a single site to focus the development and delivery of the necessary workforce skills from craft level to the 'Delta-Standard' demanded by the Nuclear Industry;
- Ensure the skills infrastructure supports the growth in Gloucestershire's economy, by future proofing and meeting the skills needs of businesses affected by workforce displacement to the demands of the nuclear industry;
- Satisfy the skills demands of Gloucestershire-based low-carbon industries arising from the anticipated demand for 45,000 skilled engineers for the construction of the Hinkley 'C' and Oldbury Nuclear Power Stations in late 2018 to power generation in the mid-2020s;
- Enable the building of a STEM conference centre and exhibition space to encourage significantly more young people to enter STEM occupations and help create a new generation of entrepreneurs;
- Provide for University research, exploiting the site's proximity to the estuary, as an excellent test bed for solar, wind and tidal energy.
- Enable education and training providers and new or existing suppliers/ researchers involved in the low carbon sector to work in a cluster encouraging engineering focused entrepreneurship and business start-ups.

The land is empty and "shovel ready" and will support growth in the energy sector but will also support growth in other sectors such as related knowledge intensive services and manufacturing sectors due to supply chain effects. Unlocking the growth potential of these sectors, in line with the strategic priorities for the county is a key objective of this project.

More information can be found in section 4.1.2.

1.4 Plans for Growth

GLOUCESTERSHIRE growth zone

'There is a potential shortfall in the availability of strategic employment land in the county.

A significant proportion of the available land is fragmented or in the wrong location incapable of supporting significant development.'

Adrian Rowley, Partner,
Alder King Property Consultants
Robert Smith, Head of Commercial Agency,
Bruton Knowles, Property Consultants

The primary aim of the Growth Zone is to ensure the availability of quality employment land in proximity to the M5 motorway attractive to businesses and with excellent connectivity throughout Gloucestershire and the rest of the UK. This will serve latent demand in the marketplace and provide the space required to enable Growth Hub supported businesses to grow.

Our plans for delivery of this employment land around Junctions 9 and 10 of the M5 are supported by a number of transport related proposals across the county which will enable the growth to be achieved through release of this employment land.[12]

More information can be found in section 4.1.3.

Employment Land at M5 J9

GFirst LEP support the proposed developments on the A46 adjacent to M5 J9 that, in total, will produce an annual GVA of £74m and 3300 jobs with no immediate cost to the public purse. In addition we will work with Worcestershire LEP, DfT, Highways Agency and the Local Authorities on a long term transport solution to the A46 congestion.

The most important of the projects at this location is the Ministry of Defence (MOD) site at Ashchurch, situated to the east of J9 on the A46 and due to be decommissioned.

We propose an acceleration of the release date of the MOD site in order to release the jobs and GVA opportunity; and to support the other two projects which relate to development of a Supermarket and a Retail Outlet & Garden Centre.

More information can be found in section 4.1.3.

Expansion of Employment Land at M5 J10

Information provided by the GFirst LEP Construction & Infrastructure Sector Group confirms that there is an opportunity for significant development at Junction 10 of the M5.

Recent enquiries from businesses for premises in or around Cheltenham have been turned away due to a current lack of suitable premises. Similarly, when successful local firms grow, they often find their expansion blocked by a lack of suitable premises in and around Cheltenham.

Two reports have been commissioned from Nathaniel Lichfield & Partners (NLP) to quantify the employment land required at J10, one by the JCS to revisit a modelling exercise based on historical data, and the other by GFirst LEP to quantify the scale and nature of likely demand for employment land.

The justification for a junction upgrade to all-movements rests on the potential to unlock a strategic employment and mixed use site which will attract significant new growth and jobs.

The reports are due in April 2014.

More information can be found in section 4.1.3.

12. These are described in section 1.4.2 and, more fully, in section 4.2.1 – Enablers for Growth (Transport Projects)

1.4.2 Enablers for Growth

GLOUCESTERSHIRE
enablers for growth

The following projects, which are predominantly but not exclusively transport related, will support and complement rather than directly contribute towards economic growth within Gloucestershire. As a consequence they are fully supported by GFirst LEP.

'I have no doubt that with the right infrastructure in place we can deliver our vision for strong economic growth, especially when coupled with our appetite, drive and ambition to succeed.'

Mark Ryan, Managing Director Gloucestershire Airport

Transport Projects

Gloucestershire has a highly accessible transport network providing good connectivity to highway and rail networks which enables its businesses, commuters and leisure users to move efficiently on local and national transport networks, using both private and public transport. The major arterial route in the county, providing transport links to the midlands, north, and south west, is the M5 motorway.

Specific challenges within Gloucestershire include reducing congestion pinch points across the county, for example:

- **The section of the A417 known locally as the 'Missing Link'[13];**
- **The A40 from west of Gloucester through to Cheltenham town centre;**
- **Facilitating new areas of housing and employment growth in response to the county's emerging local plans, including the M5 Growth Zone.**

Gloucestershire is fortunate to have a good, accessible, commercial public transport network which has an integral part to play in the county's strategy to achieve economic growth.

More information can be found in section 4.2.1.

13. The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

A417 - The 'Missing Link'

This is the only section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5 near Gloucester and is a major strategic route within the county and beyond.

It is also a major accident blackspot and features almost daily on national traffic reports.

Resolving this major infrastructure issue for the county by the proposed 'Brown Route' scheme will deliver significant economic benefits including:

- **Reduced business operation costs;**
- **Increased connectivity to wider markets;**
- **Greater exposure to potential inwards investment opportunities;**
- **The creation of construction jobs associated with delivering the proposed solution.**

More information can be found in section 4.2.1.1.

Unlocking access to the GREEN Skills Centre

The GREEN proposal outlined in section 4.1.2 will greatly benefit from the unlocking of the Berkeley site through the following road improvement schemes:

- **A419 Stonehouse corridor improvements;**
- **A38 Berkeley Bridges;**
- **Improved access to Berkeley (A38 and B4066) scheme.**

More information can be found in section 4.2.1.2.

M5 Junction 9 Transport Strategy

The M5 provides the division between Ashchurch and Tewkesbury and a significant proportion of trips between these centres involve crossing at Junction 9, with consequent delays during peak travel times.

Any additional large scale release of development land (such as the MOD site at Ashchurch) is likely to require significant additional capacity and sustainable transport interventions. Without a deliverable transport solution for Junction 9 significant development of the scale being promoted will be unachievable.

The proposal is to work with the Highways and other relevant Agencies and the local authorities to agree a transport strategy for Junction 9 in the context of the local growth aspirations. This is likely to include requirement for an up-grade to Ashchurch railway station and the rail services available there.

More information can be found in section 4.2.1.2.

M5 Junction 10 - all movements

One of the primary aims of GFirst LEP is to bring forward a significant employment and mixed use site within the vicinity of this junction. The upgrade of junction 10 will provide a four-way vehicle intersection enabling all vehicle movement on and off the M5. Once provided this will significantly increase the opportunity to develop land within the surrounding area.

The Local Authorities accept that mixed use and employment land is the most plausible and pragmatic use to bring the site forward and have strongly indicated that they are unlikely to bring forward the site in the absence of a junction upgrade.

More information can be found in section 4.2.1.2.

A40 Regeneration Areas – Improving Connectivity and Resilience

There is an opportunity to regenerate parts of the county where there is latent demand for high quality jobs, skills and training by ensuring that targeted transport investments enable a dynamic and well-connected local economy.

Many of the schemes within this proposal will alleviate or offset traffic congestion and support economic regeneration. This will be achieved by improving traffic flows and addressing congestion bottlenecks and thus enabling employers to access skilled workforces living in attractive parts of the county.

GFirst LEP supports Gloucestershire County Council's revenue bid to the Department for Transport's Local Sustainable Transport Fund and welcomes the elements of the project linked to our Growth Hub and Growth Zone.

In partnership with other organisations we will deliver the following proposals which are pre committed either as a "tail end major" or a pre-approved Gloucestershire Local Transport Board (GLTB) scheme:

- **Elmbridge Transport major scheme;**
- **A40 Bus Lane at Benhall, Cheltenham;**
- **A40 corridor bus priority;**
- **A40 Over Roundabout.**

This proposal supports and seeks funding for the following projects that are not pre committed:

Regeneration Schemes

- **Cinderford Northern Quarter Link Road;**
- **Lydney Transport Strategy;**
- **Kings Quarter Bus Station, Gloucester.**

Congestion Pinchpoint Schemes

- **B4063 Staverton Bridge Junction;**
- **A38 St Barnabas Roundabout Scheme;**
- **Gloucester south west by-pass.**

More information can be found in section 4.2.1.2.

1.4 Plans for Growth

Gloucestershire Local Transport Board (GLTB)

It is envisaged that all funding to GLTB will be allocated to projects ahead of implementation of the Single Local Growth Fund - this will be determined in April 2014.

Any future funding to be distributed for infrastructure spend from Single Local Growth Fund will be managed in line with Governance proposals within the SEP.

More information can be found in section 4.2.1.2.

Public Transport - Bus

Congestion is widely acknowledged to be a serious constraint on growth and estimated to cost at least £11bn per annum in urban areas alone, according to government analysis.

Bus services in Gloucestershire already make a significant contribution to the reduction of economically damaging congestion – especially in the Gloucester and Cheltenham urban areas.

GFirst LEP supports the public transport projects prioritised within the SEP and outlined in section 5.2.1.2.

More information can also be found in section 4.2.1.2.

Public Transport - Rail

GFirst LEP supports Network Rail's LTTP and recognises the benefits rail improvements can deliver for businesses in Gloucestershire.

Renewal of the First Great Western franchise will arise in 2016 and GFirst LEP seeks early discussions on the scope of the franchise to secure pre-consultation commitment to resolve some key issues important to businesses and the economy of the county, not least the need for station up-grades to cater for rising demand.

More information can be found in section 4.2.1.2.

Gloucestershire Airport

Gloucestershire Airport is located in the very heart of our Growth Zone and in close proximity to the M5 motorway near both Cheltenham and Gloucester. The growth potential at this locality goes beyond airport related activities and includes a wide range of economic development opportunities.

Gloucestershire Airport handles around 90,000 aircraft movements each year, many for business purposes. Our aim is to optimise the contribution and benefit Gloucestershire Airport and the land around it can make to the local communities and economy.

More information can be found in section 4.2.2.

Broadband

The rural nature of Gloucestershire means there will always be challenges to ensure our rural villages and market towns are well connected. High speed broadband and reliable mobile phone networks have a key role to play as more and more business is conducted via the internet and on the move.

Our aim is to bring Next Generation Access broadband to around 90% of homes and businesses in both urban and rural parts of the county, resulting in an estimated boost to the local economy of approximately £419M over 10 years.

More information can be found in section 4.2.3.

Mobile Phone Networks

Like Broadband, reliable mobile phone connectivity has become an essential of modern life and vital to the business community.

The government funded Mobile Infrastructure Project (MIP), sponsored by the Department for Culture, Media and Sport, will provide coverage in hard to reach areas of the UK.

This important project will deliver real benefit to the rural based businesses of Gloucestershire.

More information can be found in section 4.2.3.

1.4 Plans for Growth

Planning (Collaboration)

We recognise that the planning process has a key role to play in supporting the delivery of the SEP and GFirst LEP and the Local Authorities within the county are committed to ever closer collaboration to ensure that the planning system supports our ambitions for economic growth.

More information can be found in section 4.2.4.

Housing

We recognise that Housing is critically important in securing economy growth and we are exploring the scope for alignment of the timing of reviews of our core strategies and rationalisation of our approach to identifying housing need across the county.

More information can be found in section 4.2.5.

Regeneration

We are implementing a programme of major regeneration projects across the county which complement the growth programme set out in the SEP, tackle disadvantage and poor quality sites and environment, and help to make Gloucestershire an attractive place in which to live, work, invest and visit.

More information can be found in section 4.2.6.

Local Authority contribution

We are developing a package approach to using local resources to match local growth fund investment in Gloucestershire, potentially drawing on a variety of funding streams including pooled business rates, new homes bonus and capital receipts.

We are jointly funding a new post to co-ordinate the local contribution to implementing the SEP and are proposing to create project development boards to secure the effective delivery of major developments in the growth zone.

More information can be found in section 5.

Financial Support

There are a number of possible mechanisms through which councils can support the proposals in the SEP which we are keen to explore.

More information can be found in section 5.1.

Land, assets and co-location

We are committed to making the best use of public assets in support of delivery of the SEP. and have established a pan public sector forum to work on rationalising the combined operational estate.

More information can be found in section 5.2.

Improvements to the Planning Process

The effective operation of the planning process is a key issue for many businesses and we are commissioning a programme of work to improve the effectiveness and consistency of the planning system in Gloucestershire.

More information can be found in section 5.3.

1.4 Plans for Growth

Supporting Delivery

The Gloucestershire Councils have agreed to fund a joint post to co-ordinate the local authority contribution to the SEP and are also exploring the possibility of establishing a project development board to co-ordinate delivery of the growth zone proposals.

More information can be found in section 5.4.

Governance

We are establishing a Statutory Joint Committee that will provide a mechanism for collective decision making and local democratic accountability to help drive economic growth in the county.

More information can be found in section 5.5.

Delivery Arrangements

We have given consideration to likely delivery arrangements and, as a matter of principle, GFirst LEP will endeavour to work to the UK Government's eight principles for good commissioning and the guidelines provided in the National Audit Office's 'Successful Commissioning' toolkit.

More information can be found in section 6.

Sequencing and Prioritisation

Prioritisation has been carried out by the GFirst LEP Board and managers with input from stakeholders.

More information can be found in section 6.1.

Timeline

A Timeline and more information can be found in section 6.2.

Risk

GFirst LEP recognises the need for effective risk management systems and procedures and during the period of development of our SEP for Gloucestershire we have managed risk by taking a pragmatic approach involving creation and maintenance of a Risk Register.

More information can be found in section 6.3.

Engagement

In recent years we have committed significant resources to leading a major business and community wide engagement programme.

More information can be found in section 7.

1.5 What we will deliver

Our 'offer' to government

This plan will deliver the following benefits for Gloucestershire:

- We will have achieved our ambitious targets of:-

33,909 jobs created and 2,125 protected;

3,200 new houses;

6,108 qualifications and 5,421 apprenticeships;

Highways Agency contribution of £302m;

Other public sector contribution of £43m;

Private sector leverage of £157m;

Over the period 2015-2021 and as a direct consequence of the interventions within this Plan, we will have grown Gloucestershire's economy by £493m;

This is in addition to the annual GVA average increase of 3.2% achieved to 2030/31 as a result of our Core Strategy interventions in Gloucestershire.

Figure 2

Increase in total GVA

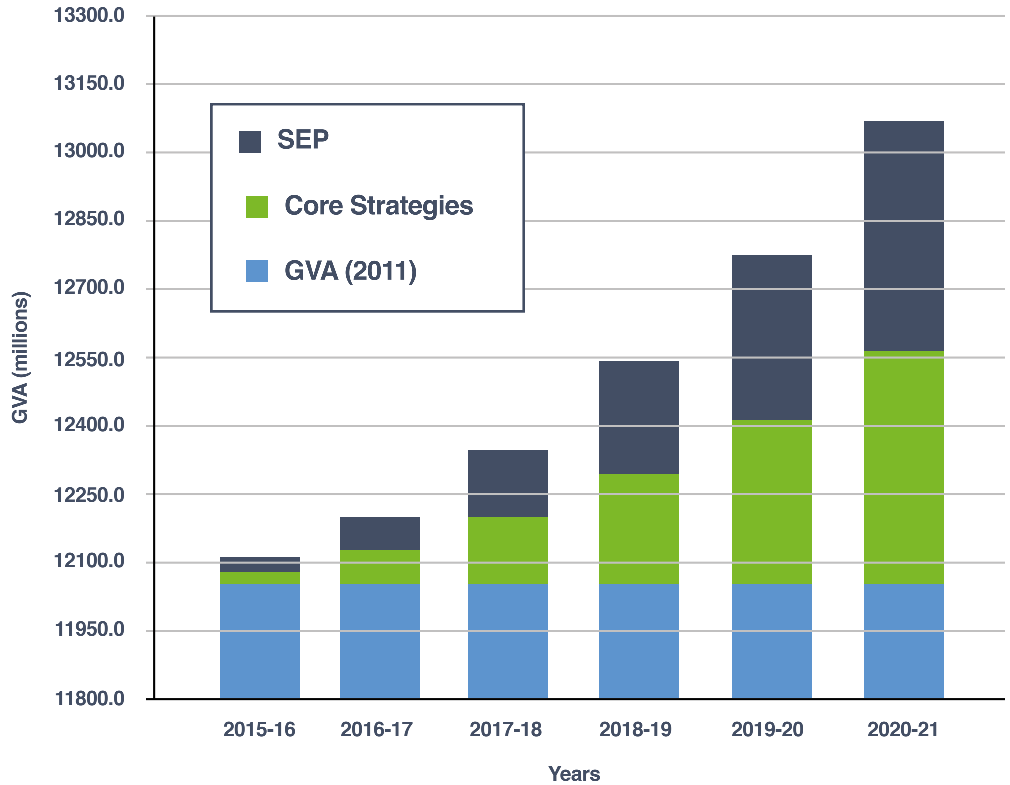


Table 1

Annual GVA Increase (millions)			£ Millions				Cumulative
Year	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**	**2020-21**
SEP	32.2	45.2	68.7	92.2	115.7	139.2	**493.3**
Core Strategies	24.1	48.2	72.4	96.5	120.6	144.7	**506.5**
Total	56.3	93.5	141.1	188.7	236.3	283.9	**999.8**
Glos GVA (2011)	12059.4 [14]	12059.4	12059.4	12059.4	12059.4	12059.4	

14. This is calculated using the base line that in 2011 the Gloucestershire economy was worth £12 billion: £20,200 output per head (ONS LEP data 2011) Population 597,000 (2011 census)

1.5 What we will deliver

Our ‘offer’ to government continued

- Those business sectors in the county identified as having potential for significant export growth will be fulfilling that potential.
- Our excellent start-up survival and job creation rates will have been maintained and strengthened.
- More young people will stay in or move to Gloucestershire to start-up businesses and take up highly skilled jobs in the county.
- The medium/high tech manufacturing and knowledge intensive business sectors in the county with potential for significant growth - including a cluster within the nuclear energy sector – will be fulfilling that potential.
- Gloucestershire will have a skills development and training centre specialising in Renewable Energy, Engineering and Nuclear and of national and European significance.
- Gloucestershire will be attracting and retaining businesses to top quality employment land in excellent locations and with great connectivity close to the M5.
- We will have enhanced the county’s infrastructure and greatly improved broadband and mobile phone connectivity.
- We will have created a high quality natural environment through exemplar built development which improves the quality of life for people and improves habitat for wildlife.

1.6 Our ask of Government

'When I look around at so many great companies across Gloucestershire there's no doubt in my mind that we have the talent and ambition to deliver growth above the national average.'

Ruth Dooley, Partner, Hazlewoods LLP

The following is a high level summary of our 'asks' of Government.

Export Support / UKTI

Gloucestershire has the highest proportion of employees in export intensive sectors of all LEPs alongside London and yet the region has historically underperformed in export terms. Quite simply, doing what we've always done to support export in the county will not enable us to capitalise on our export potential.

We want export services delivered by UKTI at the county level to:

- **Increase its reach and penetration so that it supports more Gloucestershire companies;**
- **Be specific to the needs of Gloucestershire;**
- **Be delivered in conjunction with the Growth Hub to ensure its services are tailored to the needs of individual companies.**

Central funding of investment services would continue but would not be through the existing "one size fits all" UKTI offering. Access to the UKTI database via this resource would be available as a growth hub service. This would enable closer connectivity with demand locally through the networks developed by the LEP.

The transfer of resource would specifically involve International Trade Advisors. There is no ask to transfer their employment to the LEP, there would be SLA's with the local UKTI providers, to ensure services are aligned to local needs, and that Gloucestershire companies are enabled to make maximum use of the UKTI services available.

Our ask of Government is to allocate resource proportionate to export numbers in the South West region to the locality for delivery of export services by the GFirst LEP through the Growth Hub. Services would be delivered under a UKTI / GFirst LEP / Growth Hub brand.

Ask:
From April 2015, target dedicated UKTI resource to Gloucestershire to ensure that UKTI export support services are promoted and delivered in a way that reaches more companies in the county.

SFA/Skills - Supporting growth: A joined-up approach to raising skill levels in Gloucestershire

Education providers at all levels have a critical role to play in preparing and supporting the current and future workforce of the county and we are fortunate in having high quality institutions within Gloucestershire that already contribute significantly towards this aim.

GFirst LEP will deliver an integrated approach to stimulating the demand for and planning skills provision from school, college and university leavers. This will enable us to better meet the needs of industry by providing the right number of places in the right skills areas at the right level and so ensure industry in Gloucestershire minimises skills gaps.

1.6 Our ask of Government

Working through the Growth Hub the programme, will co-ordinate:

- The GFirst LEP Skills Group involving FE, HE and employers to review short-term and medium-term skills needs in the county and develop a county skills plan. The group will ensure that the delivery of skills reflects current and future skills gaps and/or opportunities. The county skills plan will be reviewed annually;
- A programme with employers to share best practice and promote the benefits of developing skills in the workplace in order to support employee progression; including the development of vocational training programmes and higher level apprenticeships;
- Advice and guidance available through Education Providers supported by employers and which reflects current and future skills gaps and/or opportunities;
- A programme of workplace engagement with schools, FE and HE, including mentoring and outplacement to ensure more young people are better prepared for work;

Employers, Schools, Colleges and Universities in the county all have a key leadership role in stimulating the future demand for and supply of skills and will be asked to sponsor the programme either by contributing in-kind or with actual resources to support this element of the Growth Hub.

In addition Gloucestershire will seek the support of key businesses through their corporate responsibility programmes and through direct support from the Skills Funding Agency and devolving of funding.

The programme will offer the opportunity to test and refine the role of LEPs in planning and supporting skills development, including the alignment of SFA funded programmes with the priorities of the SEP and a significant influence on the metrics and measures used to assign future funding.

It will report into a group comprising key sponsors, which in turn will report to the Board.

Ask:

SFA and BIS to work with GFirst LEP to design a programme that provides sufficient incentives for FE providers to deliver the LEPs skills priorities: including

Government recognition and support for this work over an initial two-year period, and that independent research is commissioned to establish its efficacy.

Clear role for the LEP in co-developing the overall FE provision plans to ensure they are aligned to economic need and the priorities of the SEP.

Access to information held by SFA and other Government departments that will enable the LEP to create intelligent demand amongst learners and employers.

The devolving of funding to the LEP to support skills delivery identified in the county skills plan.

1.6 Our ask of Government

Apprenticeship Clearing House

There is currently a disconnect between the National Apprenticeship Service (NAS) and employers in Gloucestershire. The Apprenticeship Clearing House (ACH) will ensure that the right learners are placed with the right businesses in Gloucestershire. This service will be further enhanced through close working with the NAS and co-location of the NAS and ACH in the Growth Hub.

The LEP asks that the NAS provide a relationship manager that can work with GFirst LEP so that they are fully informed of any changes to the service that will need to be addressed and supported by the ACH. For example, in the case of the recent announcements that funding will go direct to employers, the ACH would be in a position to help support and inform employers about such changes.

GFirst LEP is also keen to support events that will promote the NAS in the county and asks that future funding for NAS promotional activities will support the delivery of this proposal in the county.

Ask:
The National Apprenticeship Service is given a local presence as an integrated part of the Growth Hub, including cross referrals and a mechanism to share intelligence about potential employers and learners.

Gloucestershire Renewable Energy, Engineering and Nuclear Skills Centre (GREEN)

The GREEN initiative creates enormous potential to support and grow some of the UK's most significant economic sectors. An important aspect of the project is the training and development of individuals to enter sectors that are not always perceived to be attractive.

In order to increase the potential for success of both the initiative and individuals there are a number of freedoms and flexibilities requested.

To maximise the return to the UK economy and to provide the greatest value and social mobility for learners, the project requests the following Skills Funding Agency 'freedoms and flexibilities' with regards Adult & Apprenticeship funding.

Ask:
Government recognises the GREEN initiative at Berkeley as a significant national resource that will deliver the medium to longer-term skills needs for the nuclear sector.

The GREEN initiative forms part of the Government's plans for nuclear skills, including the Elite academy model.

Government directs the relevant nuclear industry lead bodies to work collaboratively with the GREEN initiative.

A package of funding for adult skills linked to infrastructure, engineering & low carbon sectors to support our GREEN initiative and a supply chain of suitably skilled individuals

Government recognises the long-term aspiration for a third River Severn crossing that would enable improved access to and from the Forest of Dean and to and from the GREEN Skills Centre.

1.6 Our ask of Government

Growth Zone

Our Growth Zone, and particularly our proposals for development at Junction 10, offers enormous potential for growth in key sectors of the Gloucestershire economy and we recognise that both feasibility and planning of large-scale development such as the changing of this junction to 'all-movements' are costly and time consuming.

We would like Government to do everything it can to reduce the bureaucratic burden of feasibility and planning stages of such schemes – and in the process reduce significantly the cost to the public purse of such developments where there is a demonstrable return on investment and evidenced significant levels of local support.

Ask:
Government, and in particular DfT, reduce the timeframe and cost required for feasibility and planning of major transport infrastructure schemes.

M5 Junction 10 – all-movements

One of the primary aims of GFirst LEP is to bring forward a significant employment and mixed use site within the vicinity of this junction. The upgrade of junction 10 will provide a four-way vehicle intersection enabling all vehicle movement on and off the M5. Once provided this will significantly increase the opportunity to develop land within the surrounding area.

Ask:
That government recognise the significant growth potential this proposal will enable and support the employment and mixed use expansion at junction by providing the necessary funding.

That the Highways Agency considers the 'all-movements' upgrade of junction 10 through their Route Based Strategy process.

MOD Site at Ashchurch/ M5 Junction 9 Transport Strategy

The development of this site for housing and jobs and early release and delivery of the MOD Ashchurch site are both of vital importance to our growth plans.

Our proposal is to work with the Highways Agency and the local authorities to agree a transport strategy for M5 Junction 9 to enable delivery of prime employment land in excellent locations with great connectivity to the M5.

In keeping with their approach to Joint Investment Planning in Gloucestershire we understand that the HCA will align its housing and infrastructure investment with the resources of GFirst LEP and the local authorities of the county in order to expedite the delivery of homes and jobs at the Ashchurch site.

Ask:
Release of the MOD Site at Ashchurch is critical to the development proposal – see separate ask on this specific topic.

That the HCA works with GFirst LEP and the local authorities to 'unlock' the Ashchurch site. That HCA actively contributes to the process of planning for employment and housing development at the site. That the HCA recognises Ashchurch as a significant growth priority for the Agency and aligns its resources accordingly.

Commitment from the Highways Agency to work in partnership with local authorities and GFirst LEP to agree and then implement a transport strategy for junction 9. This will provide business confidence and enable development to come forward.

1.6 Our ask of Government

The A417 'Missing Link'[15]

A 5km section of the A417, known locally as the Missing Link, is the only section of single carriageway at the Gloucester/Cheltenham end of the 50km A417/A419 route linking the M4 at J15 near Swindon to J11a of the M5 near Gloucester.
It provides connectivity for businesses to local, national and international markets and is also the major strategic route from the Midlands to London, Thames Valley, Airports and the south coast ports.

With over 34,000 traffic movements daily, it is one of the most heavily congested roads in the South West and recognised nationally as a notorious accident black spot and cause of major delays as a consequence of high traffic levels, HGVs on uphill sections and incidents such as lorry engine and brake fires, all of which contribute to unreliable journey times.

Ask:

To include the A417 'Missing Link' in Phase 2 of the Route Based Strategy (RBS) work for further development between March 2014 and March 2015;

To include the A417 'Missing Link' in the Government's major scheme programme for delivery from April 2015 onwards.

Delivery of the Brown route major scheme is costed at £255m.

A46

The A46 runs through the South East corner of Worcestershire and into both Gloucestershire and Warwickshire. The pinch-points on this key strategic route need to be addressed as a priority and if resolved will support the economic growth objectives of all three affected LEP areas.

Ask:

DfT to instruct the Highways Agency to deliver a plan, by April 2016, which outlines improvements to the key strategic route A46 to remove growth constraints, address pinch-points and support economic growth objectives across three neighbouring LEP areas (Worcestershire, Gloucestershire and Warwickshire).

15. The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

1.6 Our ask of Government

A40 Regeneration Areas – Improving Connectivity and Resilience

Many of the schemes within this proposal will alleviate or offset traffic congestion and support economic regeneration. This will be achieved through improving traffic flows and addressing congestion bottlenecks so enabling employers to access skilled workforces.

Cinderford Northern Quarter project, which is already is underway, tackles localised deprivation while delivering wider economic and social benefits including a new college which will be the anchor point for the programme. The project has a longstanding commitment of £14.5m from the HCA.

GFirst LEP support Gloucestershire County Council's revenue bid to the Department for Transport's Local Sustainable Transport Fund (LSTF).

Ask:

Government recognises the special status of the Forest of Dean in terms of its geography, built and natural heritage, and economic profile, and supports our efforts to enable the area to achieve its potential by providing the necessary funding to support the proposed regeneration and transport projects.

Government supports Gloucestershire County Council's separate bid for revenue through the Department for Transport's Local Sustainable Transport Fund.

Government releases capital to fund the Cinderford Northern Quarter Link Road that will unlock development.

Blackfriars

At a strategic location in Gloucester , between the Historic Docks, Cathedral and River Severn, this site provides an opportunity to consolidate predominantly public sector 'brown-field' landholdings to deliver a mixed use regeneration scheme that enhances and respects the historic fabric of the site.

Ministry of Justice site at Blackfriars: A significant opportunity exists to deliver a major regeneration project within the centre of Gloucester. The majority of land in this area is in public sector ownership, allowing a scheme to be delivered without protracted problems of land assembly.

Ask:

That the Ministry of Justice enter into detailed discussions, working in partnership with GFirst LEP, the County and City Councils and their appointed developer partner(s), based on the outcomes of the Justice Review and the disposal of the former Gloucester Prison, to enable a comprehensive transformational scheme for the centre of Gloucester.

That the HCA consider financial help for the housing component of the project.

That the HCA apply a programme approach to their intervention on projects within the GFirst LEP area, therefore removing minimum project requirements to enable them to contribute towards smaller schemes as part of a larger programme.

1.6 Our ask of Government

gfirst LEP growing gloucestershire

Public sector co-location

There are already many examples where the Gloucestershire local authorities have collaborated in joint arrangements on shared service provision on areas such as HR, payroll, legal services, refuse and depots.

Through the Area Review process, other opportunities for further rationalisation and co-location of service delivery have been identified in some of the principal centres/towns. These opportunities will be discussed with service commissioners imminently upon completion of the full area reviews.

Ask:
That Gloucestershire local authorities work with BIS and DCLG to explore the potential of utilising additional Government funding to implement some of the emerging ideas/proposals on public sector co-location/service delivery that will support regeneration and growth aspirations aligned to the SEP.

Business Rate Levy

Gloucestershire is one of only 18 places to have established a business rate pool. Under this arrangement, where the pool generates funds in excess of the pre-pool position, the surplus would be used in ways more fully described in section 5.1.

Ask:
An adjustment to the way in which the business rate levy is applied in Gloucestershire, which currently penalises us in comparison with other areas. We understand that 75% of pools have a 0% levy: if this was applied to us it would generate an additional £3.7m which could be used to support the implementation of the SEP.

New Homes Bonus (NHB)

We are exploring the contribution that could be made by the New Homes Bonus, particularly in relation to NHB income generated from large developments including the possibility of using this as an income stream to repay the cost of borrowing to fund upfront capital investments.

Ask:
Greater certainty about the future longevity of the business rate and NHB regimes which would enable us to plan and potentially borrow with more certainty.

Tourism

We plan to support tourism sector businesses with high growth potential through our Growth Hub, collaborative working with the destination management organisations in the county and a strengthened partnership with Visit England and Visit Britain.

Ask:
For Visit England and Visit Britain to recognise and actively support the international reputations of The Cotswolds, and the Wye Valley & Forest of Dean;

For Visit England and Visit Britain to work with and actively support the destination management organisations for The Cotswolds, and the Wye Valley & Forest of Dean;

For UKTI to proactively support tourism sector businesses in Gloucestershire to increase their access to and gains from overseas markets.

1.7 VFM summary statement

Strategic Economic Plan: Project & Programme Information Table All amounts in £ millions

Table 2

Summary ask of LGF (15 / 16)		Outputs/Impact (15 /16)				
Area	Total LGF 15/16	Jobs	Jobs protected	Apprenticeships	Qualifications	GVA
Growth Hub	6.516	1,829		703	804	22.653
GREEN	5.00	2,520	350	200	167	9.98
Growth Zone						
Transport (Enablers for Growth)	10.05					
Skills Capital	see Growth Hub & GREEN					

Cross LEP Working

There are no LEP Joint Bids as part of our SEP.

Financial Information

Project or Programme Name & Brief Summary	Theme of Project or Programme	Sources of Funding	Funding Type Capital or Resource	TOTAL	Profile (£m) 2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Further information on Project (ref)	Project Output information
Gloucestershire growth hub Providing tailored support services for high growth potential businesses and enabling individuals to develop the skills that businesses need.	Skills Business Growth	Private Investment	Capital	20.1	10.1	10.00					See Section 4.1.1 & Appendicies 1A-1H (outputs)	2015/2021 Jobs : 14,822 Qualifications: L2 - 2,800, L3 - 1,746, L4 - 228, L4+ - 48 Total: 4,822 Apprenticeships: 4,221 GVA: 135.915m
		Private Investment	Resource	4.5	4.5							
		Private Investment (in Kind)	Resource	3.647	0.6	0.6	0.6	0.6	0.6	0.647		
		Competitive LGF	Capital	12.00	6.50	5.50						
		Competitive LGF	Resource	0.096	0.016	0.016	0.016	0.016	0.016	0.016		
		EU SIF	Resource	14.25	3.22	2.05	2.07	2.08	2.09	2.74		
		Public Sector	Resource	7.665	6.005	0.332	0.332	0.332	0.332	0.332		
GREEN Delivering a renewable energy, engineering & nuclear skills centre.	Skills Innovation	Private Investment	Capital	19.50				6.5	6.5	6.5	See Section 4.1.2 & Appendix 2 (outputs)	2015/2021 18,220 Jobs created 2,125 Jobs protected Qualifications: L2 - 540, L3 - 386, L4 - 192, L5 - 91,L7 - 77 Total: 1,286 Apprenticeships: 1,200 GVA: 79.32m
		Competitive LGF	Capital	5.00	5.00							
		EU SIF	Resource	5.95	1.31	0.85	0.91	0.92	0.93	1.03		
		Public Sector	Capital	5.00	5.00							
		Public Sector	Resource	6.45	2.16	2.16	0.66	0.66	0.66	0.15		
Gloucestershire growth zone Providing quality employment land attractive to businesses.	Infrastructure Employment Land Housing	Private Investment	Capital	105.00				35.00	35.00	35.00	See Section 4.1.3 & Appendicies 3A-3B (outputs)	2019/2021 GVA 278m (139m pa) Jobs: 867 Housing 3,200

1.7 VFM summary statement

gfirst LEP growing gloucestershire

Table 2 Continued

Project or Programme Name & Brief Summary	Theme of Project or Programme	Sources of Funding	Funding Type Capital or Resource	Profile (£m) TOTAL	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Further information on Project (ref)	Project Output information
GLOUCESTERSHIRE enablers for growth Projects which complement and enable growth at our three flagship projects, and our Local Authority Core Strategies	Transport	Highways Agency	Capital	302.00					141.00	161.00	*See Section 4.2.1 & Appendicies 4A-4E (outputs)*	**2015/2021 Contribution to SEP: Outputs in Growth Hub, GREEN and Growth Zone. Contribution to Core Strategies: Enables the potential of the strategies to be realised**
		Pre-Committed LGF	Capital	14.10	2.00	7.00	5.10					
		Local Authorities	Capital	7.40	7.40							
		Homes & Communities Agency	Capital	4.30	4.30							
		Private Investment	Capital	5.07	0.07				5			
		Competitive LGF	Capital	21.60	8.05	3.11	1.62	4.30	2.62	1.90		
		GLTB	Capital	9.80	1.49	4.92	0.00	1.70	1.69			
		Other revenue TBC	Resource	2.50	1.00	1.50						

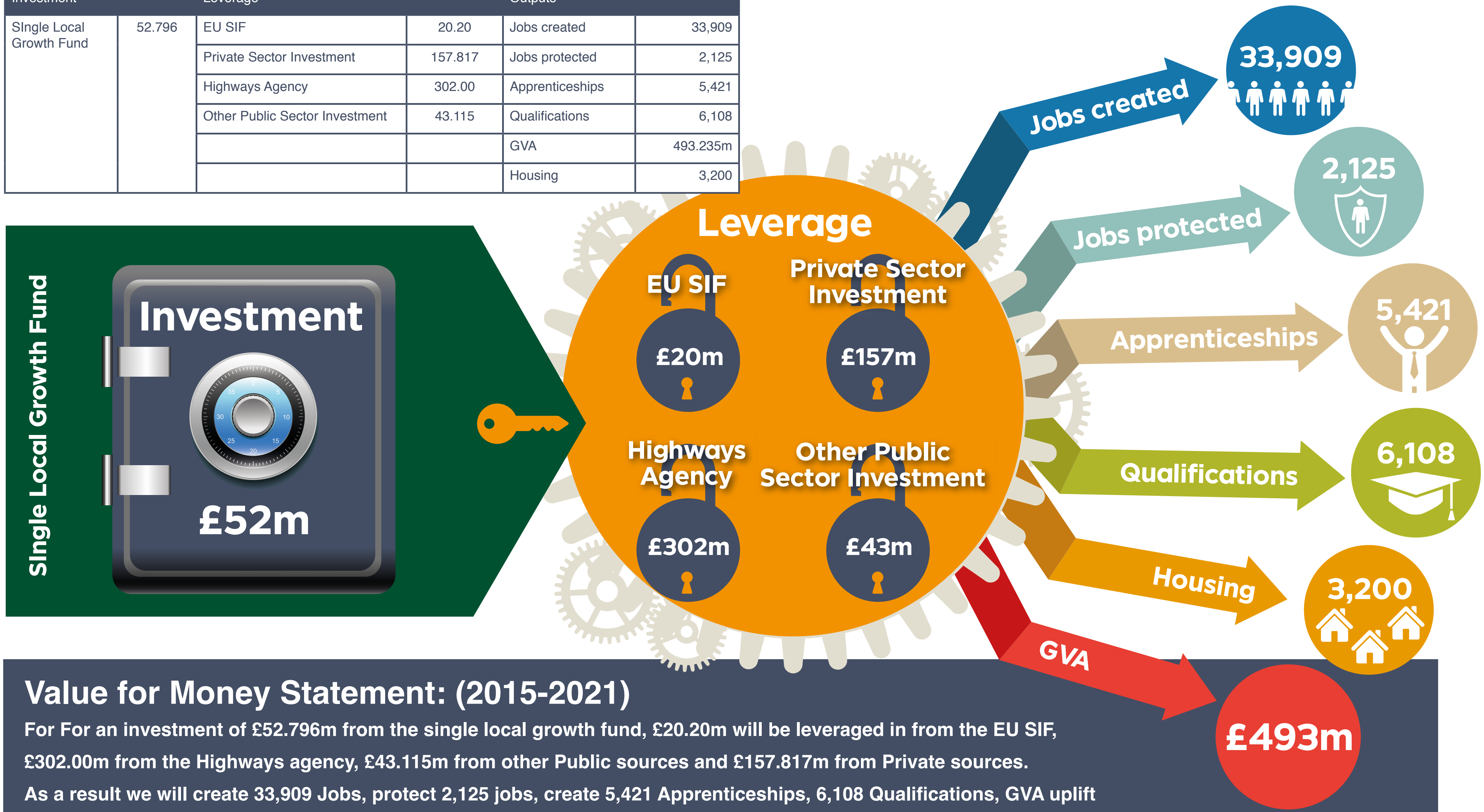
	Sub Totals	Competitive LGF		38.696	20.066	8.126	1.636	4.316	2.636	1.916
		Pre-Committed LGF		14.100	2.000	7.000	5.100			
		Public Sector: Local Authorities		7.400	7.400					
		Public Sector: Non Local Authority		19.115	13.165	2.492	0.992	0.992	0.992	0.482
		Private Investment		154.170	14.670	10.000		41.500	46.500	41.500
		Private Investment (in Kind)		3.647	0.600	0.600	0.600	0.600	0.600	0.647
		Highways Agency		302.000					141.000	161.000
		Homes & Communities Agency		4.30	4.30					
		GLTB		9.80	1.49	4.92		1.70	1.69	
		Other revenue TBC		2.50	1.00	1.50				
		EU SIF		20.200	4.530	2.900	2.980	3.000	3.020	3.770
	Total			**575.928**	**69.221**	**37.538**	**11.308**	**52.108**	**196.438**	**209.32**

1.7 VFM summary statement

Value for Money

Table 3

Investment		Leverage		Outputs	
SIngle Local Growth Fund	52.796	EU SIF	20.20	Jobs created	33,909
		Private Sector Investment	157.817	Jobs protected	2,125
		Highways Agency	302.00	Apprenticeships	5,421
		Other Public Sector Investment	43.115	Qualifications	6,108
				GVA	493.235m
				Housing	3,200



Value for Money Statement: (2015-2021)

For For an investment of £52.796m from the single local growth fund, £20.20m will be leveraged in from the EU SIF, £302.00m from the Highways agency, £43.115m from other Public sources and £157.817m from Private sources.

As a result we will create 33,909 Jobs, protect 2,125 jobs, create 5,421 Apprenticeships, 6,108 Qualifications, GVA uplift of £493.235m and Housing 3,200

1.8 Local Partnership Working

'The agreement by all local authorities within Gloucestershire to the formation of a Statutory Joint Committee is a clear signal from all councils that we are fully committed to working together to deliver the growth Gloucestershire needs.'

Cllr Mark Hawthorne, Leader of Gloucestershire County Council

A shared vision, a set of core objectives and a common desire to increase the prosperity of the county.

The successful delivery of this Strategic Economic Plan demands close collaboration and partnership working across the county. There are strong and well established working relationships between GFirst LEP, the private sector, the seven local authorities, the HE and FE sectors, the Local Nature Partnership and the voluntary and community sectors.

We work collaboratively at strategic and operational level, to ensure that there is alignment between the Joint Core Strategy (of Tewkesbury, Cheltenham and Gloucester), the local strategies of Stroud, Cotswold and the Forest of Dean, Gloucestershire County Council's strategic plan, and both our EUSIF Strategy and Strategic Economic Plan.

We have some excellent examples of joint working including a genuinely joined-up approach to managing the Growing Places Fund and work between GFirst LEP and the University of Gloucestershire to integrate services for business, promote economic development and create the Growth Hub.

Our Countywide Strategic Planning Issues Group (CSPIG) brings together the seven local authorities, the Homes & Communities Agency and GFirst LEP to plan strategic infrastructure and coordinate development of a model for the Community Infrastructure Levy.

We are making organisational changes to create an effective structure so that all parties can work collaboratively while ensuring effective governance.

These changes are outlined in more detail in section 5.5.

Strategic Economic Plan for Gloucestershire

1.9 Alignment of SEP with EU Structural and Investment Funds (EUSIF)

EUSIF funding has a critical role to play in supporting our drive for economic growth in Gloucestershire.

Our Strategic Economic Plan is focused on enhancing key drivers of productivity where the GFirst LEP and local partners can exert greatest influence.

A significant proportion of our EUSIF allocation is intended to underpin the Growth Hub and GREEN flagship projects and to provide a source of revenue funding for these high priorities within the SEP. Further details can be found in the Gloucestershire EU Structural and Investment Fund strategy. [16]

16. European Union Structural and Investment Funds (EUSIF) - submitted 31st January 2014.

Productivity

Productivity is a critical determinant of long run economic performance and living standards.[17]

If our ambitious growth objectives are to be met, concerted effort is needed by public and private sector partners to reverse the recent decline in productivity within the county. Productivity data for Gloucestershire (shown in section 1.1) suggests this decline is not a temporary phenomenon but reflects longer-term changes in the structure of the economy.

Our Strategic Economic Plan is focused on enhancing key drivers of productivity where the LEP and local partners can exert greatest influence and our EUSIF funding bid aims to support and complement these efforts.

The changing structure of the local economy

The structure of the Gloucestershire economy broadly reflects national trends but with some important exceptions. Table 1 profiles the Gloucestershire economy in terms of economic output and employment in different sectors.

The figures show that Gloucestershire has retained **a significant manufacturing sector** - the largest sector in the county in terms of output (19.7%), and the second largest sector in terms of employment (11.7%). This ratio of output to employment illustrates the high levels of productivity in manufacturing. According to data from the LEP Network (2012), we have **the highest proportion of employment of all LEP regions in 'high and medium technology manufacturing'** at 6.7%.

The nearest is Leeds with 5.5%.[18] For example, we are home to Renishaw, a global company with core skills in measurement, motion control, spectroscopy and precision machining, and GE Aviation, a world leading provider of commercial and military jet engines.

Table 4: Sectoral contributions to local GVA & employment, 2013

	GVA		Employment	
	GVA £m's	%	000s	%
1 : Agriculture, forestry & fishing	116	1.0%	7.9	2.6%
4 : Mining, quarrying & utilities	258	2.3%	3.5	1.1%
3 : Manufacturing	2,223	19.7%	36.0	11.7%
4 : Construction	893	7.9%	21.7	7.0%
5 : Motor Trades	224	2.0%	6.1	2.0%
6 : Wholesale	299	2.7%	11.1	3.6%
7 : Retail	717	6.4%	28.2	9.1%
8 : Transport & storage	390	3.5%	9.6	3.1%
9 : Accommodation & food services	283	2.5%	16.9	5.5%
11 : Information & communication	617	5.5%	9.4	3.1%
11 : Financial & insurance	726	6.4%	9.9	3.2%
12 : Property	364	3.2%	3.4	1.1%
13 : Professional, scientific & technical	624	5.5%	21.9	7.1%
14 : Business administration & support services	477	4.2%	23.1	7.5%
15 : Public administration& defence	1,069	9.5%	18.2	5.9%
16 : Education	792	7.0%	25.7	8.3%
17 : Health	865	7.7%	37.8	12.3%
18 : Arts, ent & recreation	346	3.1%	18.1	5.9%
Total	**11,284**	**100.0%**	**308.5**	**100.0%**

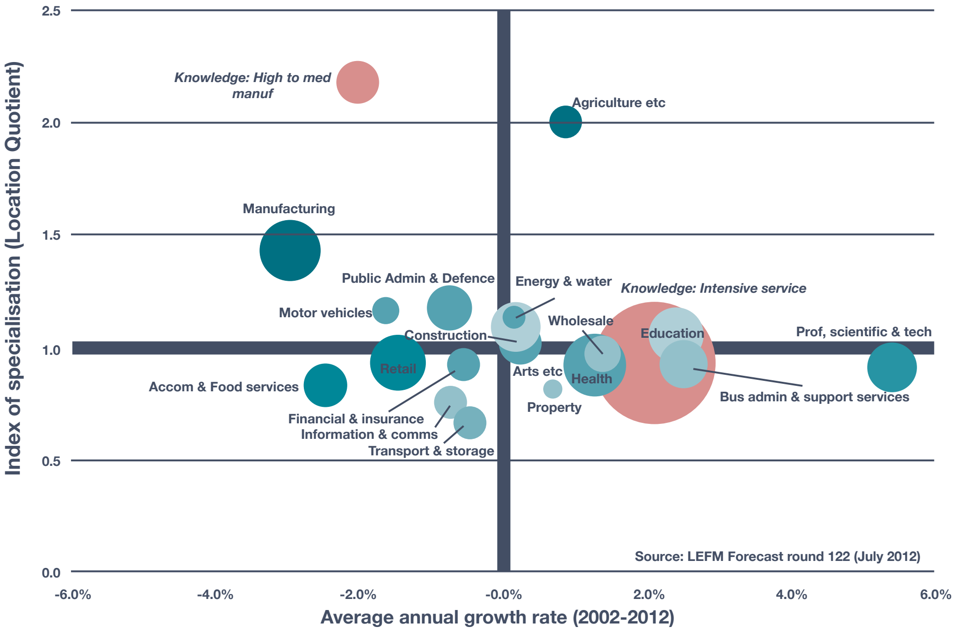
17. Nobel Prize winning economist Paul Krugman said: "Productivity isn't everything, but in the long run it is almost everything. A country's ability to improve its standard of living over time depends almost entirely on its ability to raise its output per worker." Quoted from Krugman (1994) The Age of Diminishing Expectations.

18. The LEP Network (2012) 'Creating successful local economies: Review of Local Enterprise Partnership area economies

2. Key Facts & Data

Figures 3 and 4 plot the change in employment and GVA respectively over the last 10 years (x-axis), against location quotients (y-axis)[19] for a range of different sectors. The size of the circles indicates the proportion of employment and GVA of each sector in the county. These figures provide an indication of the changing structure of the Gloucestershire economy and the position relative to the UK.

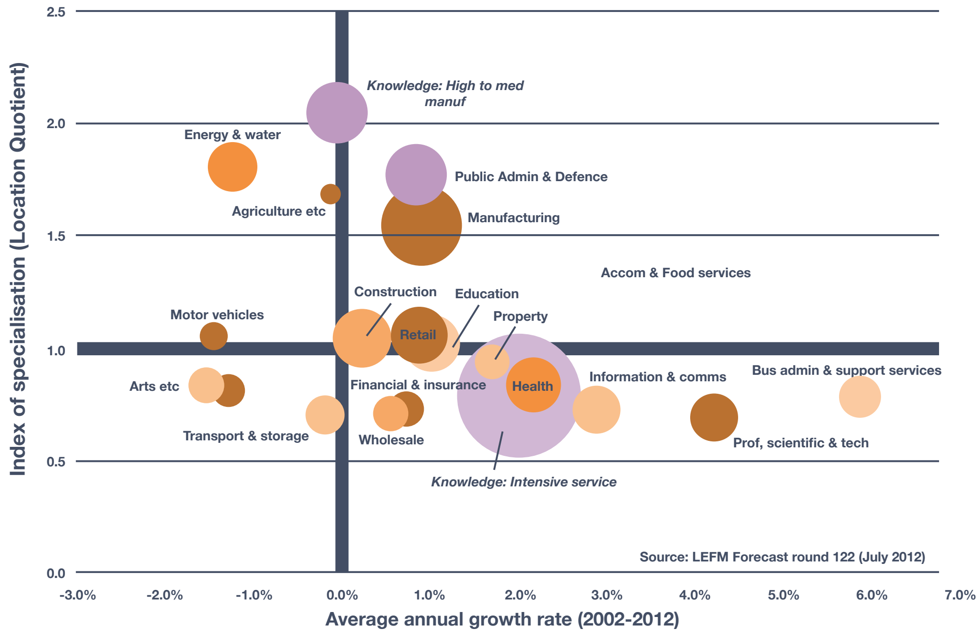
Figure 3: Employment change 2002-2012



The manufacturing sector now employs considerably fewer people but output has continued to grow due to productivity gains. Knowledge intensive services have grown in terms of both output and employment but location quotients suggest these are under-represented in the area. The professional, scientific and technical sector has seen some of the highest rates of growth in output and employment but remains slightly under-represented in the county. Similarly, business services have seen the highest annual growth rates but are still under-represented in terms of employment and output.

19. Where an LQ greater than 1 indicates over-representation (e.g. an LQ of 1.2 indicates 20% more output or employment in the sector relative to the UK.

Figure 4: GVA change 2002-2012



The agriculture sector is over-represented relative to the rest of the UK but still comparatively small in terms of the numbers it employs and its contribution to output. While there has been growth in employment, output has changed little.[20] Relative to the rest of the UK the energy and water sector is over-represented in the county and important in relation to its contribution to the local economy although output has declined in the last ten years.

The decline in employment in activities related to the public sector seems likely to continue as spending cuts continue nationally to tackle the deficit.

20. Sample sizes mean we should be cautious about inferring too much about the apparent decline in productivity.

2.1 Areas of High Growth Potential

We are in the top three LEPs for employment within knowledge intensive manufacturing and services and have particular specialisms in the following:

Nuclear and renewable energy;

Aerospace;

Precision Engineering and medical instruments;

Export Intensive.

Professional, Scientific & Technical, Finance & Insurance and the Media, particularly digital media, are also very important to the county.

Our plan aims to exploit the high growth potential that exists within our areas of specialism.

Tourism

Tourism remains vital to the economy of Gloucestershire.

The importance of tourism to Gloucestershire from an economic, export, and an employment perspective is considerable:

- Each year the county welcomes in excess of 16 million visitors contributing over £1billion to the local economy.
- A recent study estimates that there are 1,070 tourism businesses in the Cotswolds Area of Outstanding Natural Beauty (AONB), representing 11.3% of the total number of businesses in the area, and employing 6,720 people (12.3% of total employment in the AONB)[21].
- Tourism contributes directly to local economic growth by increasing spend in the county by domestic and overseas visitors (foreign exchange).
- It contributes indirectly to local economic growth by improving the exposure and awareness of Gloucestershire in overseas markets and so helps support export. This is especially true of The Cotswolds, with its powerful international brand recognition as a tourism destination.

This is why we plan to support the tourism sector through:

- Our Growth Hub proposals where tourism businesses with high growth potential will be able to access appropriate support;
- Our EUSIF[22] strategy where the focus will be on promotion and support of tourism businesses;
- A strengthened destination management organisation/partnership that works effectively with Visit England and Visit Britain;

Working in conjunction with the destination management organisations for The Cotswolds, The Wye Valley and Forest of Dean, and with other organisations providing part of the destination management infrastructure (the local authorities, the Cotswolds Conservation Board, Marketing Gloucester, etc.), our aim is to develop an even more compelling year-round offer within the county.

21. 'Assessment of the Economic Value of the Cotswolds AONB' (2013)

22. European Union Structural and Investment Funds (EUSIF) - submitted 31st January 2014.

2.2 Supporting Evidence

This table outlines additional supporting evidence, which is available by clicking the link shown.

Table 5

Title	Description	Link
Skills Statement - Marchmont Observatory, University of Exeter	To set out the skills needs of the Gloucestershire area and how partners believe that these should be met; to allow national and European funding to be effectively targeted on local priorities; to be used as a basis for ensuring that publicly-funded provision and private investment in skills reflects local labour market requirements.	**Evidence report:** http://bit.ly/1iGANUI **Executive Summary:** http://bit.ly/1dTm9Vv **Sector Report**: http://bit.ly/1dTmbN5 **Skills Statement:** http://bit.ly/P0tHQm
Gloucestershire Educational Capability, Resources and Provision in STEM – New Economics Foundation (NEF)	To identify the STEM educational resource and capability within Gloucestershire; define the types and levels; assess the location of STEM sectors and map against the educational resource and capability, identifying gaps.	http://bit.ly/1dTmpUg **Appendix A** http://bit.ly/1gIDYfH **Appendix B** http://bit.ly/1hC2udz
Connectivity Research in Gloucestershire - Atkins	Targeted research to assess the economic impacts of deficits in the Strategic Road Network on businesses in Gloucestershire and beyond, focusing on M5 Junction 9, Junction 10 and the A417 'Missing Link'[23].	http://bit.ly/1l9CdHJ
M5 Growth Zone Strategic Economic Plan inputs - Arup	To carry out preliminary research into the opportunities along the M5 corridor for business and job opportunities, with a particular focus on the 'M5 Growth Zone' concept.	http://bit.ly/1hC2Gtj
Employment Land Availability - Alder King and Bruton Knowles	To set out the view of local Commercial Property Agents on the availability of and demand for employment land within the Growth Zone from the business community of Gloucestershire.	http://bit.ly/1iGBmNT
ONS Data Overview of Gloucestershire	Data from the 2013 LEP Network Annual Review – the ranking is out of 39 LEPs.	http://bit.ly/1dyYwXe - Appendix A (page 36)
GFirst LEP Growth Statement	To introduce the background thinking and basis for the development of a Growth Plan for Gloucestershire in line with the Government's National Growth Strategy.	http://bit.ly/1pB4ozj

23. The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

3.1 Opportunities

As outlined within the SWOT analysis in section 2.2 within the county there is potential to exploit opportunities and build on some of its strengths, for example:

growth hub | GREEN | growth zone | enablers for growth

Opportunity	What we've done	What we plan to do
A resilient, broad-based economy, one of the strongest economic areas in the UK.	Over 1,235 young people signed up in our apprenticeship campaign in 2013.	Employment Pathfinder: 4.1.1 GREEN: 4.1.2
	Over 1,700 people attended our Gloucestershire Skillsfest event looking for employment and apprenticeship opportunities.	Employment Pathfinder: 4.1.1 GREEN: 4.1.2
	Our County Council-sponsored Challenge 2013 project to get 2,013 primary school children interested in a career in engineering and manufacturing attracted nearly 4,000 children.	Gloucestershire STEM Strategy: 4.1.1 GREEN: 4.1.2
	Since 2010 some of the most innovative companies in Gloucestershire have been supported by the Technology Strategy Board to the sum of £19.6m across 67 projects.	Entrepreneur Programme: 4.1.1
	On broadband rollout, Gloucestershire leads the way, with the target for 100% coverage across the county by 2016. In partnership with Herefordshire, we have received £15 million from central Government shared between the two counties and an additional investment by Gloucestershire County Council of £7.5 million for Gloucestershire.	Enabler for Growth 4.2.3
	GFirst LEP contributed to the development in 2013 of a joint strategy from government and industry for the future of the professional and business services industry. Entitled 'Growth is Our Business: A Strategy for Professional and Business Services'[24] the policy paper was produced by the Department for Business, Innovation and Skills.	

24. http://bit.ly/1dA64cB

3.1 Opportunities: continued

growth hub | GREEN | growth zone | enablers for growth

Opportunity	What we've done	What we plan to do
A high level of start-ups and retention, with an enviable record for entrepreneurship: in 2012, over 5,000 new businesses were started, and the county has the second highest 3-year business survival rate in England at 63.5%.	Our Banking Sector Group has been recognised as a model of best practice by the Government and the Bank of England for its ability to overcome competitive rivalries to enable small businesses to access financial support. This includes running start-up seminars and a combined project to help businesses access finance.	*Business Generator: 4.1.1*

Opportunity	What we've done	What we plan to do
Businesses in growth sectors with export potential, with the highest percentage of employees in export intensive companies of any county in the UK, being joint top with London at 20.5%. We are second in the country in growth of employment in these sectors (7.3%).	Partnership agreements are already in place with China to explore trading links and an agreement was signed in October 2013 with senior Government officials from the Wuhou District in Chengdu City to explore trading links with Gloucestershire to provide clear trading routes for local businesses.	*Business Generator: 4.1.1* *GREEN: 4.1.2*
	Our Growth Hub proposal includes an Accelerated Business Growth Service providing knowledge and support to companies with high growth potential. For those within Export intensive sectors this will include introducing them to ways of expanding their business overseas, stimulating them to enter export markets.	*Business Generator: 4.1.1*

Opportunity	What we've done	What we plan to do
With a strong partnership between education and business, Gloucestershire is able to exploit well-established industry connections across the county, which is home to numerous high quality education institutions, each with its own enviable reputation to provide a highly educated and skilled labour force.	The recent announcement by University of Gloucestershire of the launch of a Growth Hub in partnership with GFirst LEP provides a unique opportunity for us to work together for the benefit of the local business community.	*Employment Pathfinder: 4.1.1*

3.1 Opportunities: continued

Opportunity	What we've done	What we plan to do
A joint approach to planning, in partnership with Public sector partners in Gloucestershire, committed to working towards a locally operated planning system that delivers efficiently and consistently for business and positively stimulates business growth.	The Planning Matters Forum, a practitioner group, meets to encourage engagement between the private and public sector to review future development opportunities.	*Enablers for Growth 4.2.4*
	CSPIG (Countywide Strategic Planning Issues Group) brings together the seven local authorities, the Homes & Communities Agency and GFirst LEP to plan strategic infrastructure and coordinate development of a model for the Community Infrastructure Levy.	*Enablers for Growth 4.2.4*

Opportunity	What we've done	What we plan to do
Availability of sites - Gloucestershire has historically benefitted from having large, well-located employment sites; this plan seeks to ensure the continued availability of similarly attractive sites in the future.	As the country's first Retail Pathfinder we devised an innovative and unique planning toolkit to help reinvigorate high streets across the country.	*Business Expansion Service: 4.1.1*
	Funding has been secured for a number of exciting regeneration schemes in the county with the aim to stimulate growth and create jobs.	*Enablers for Growth 4.2.6*

3.1 Opportunities: continued

Opportunity	What we've done	What we plan to do
Potential of the M5 Growth Zone - most of the employment and housing within the county is clustered around the M5 which runs from north east to south west close to Tewkesbury, Cheltenham, Gloucester and Stroud.	Gloucestershire's Local Transport Board is playing a vital role in influencing how £9.8 million will be invested to improve transport in the county. Already, we have seen improved rail lines between Swindon and Kemble and secured the first funding from the £8.4million Gloucestershire Infrastructure Investment Fund to stimulate growth and create jobs in Cheltenham and Gloucester.	*Growth Zone 4.1.3*
	A new multi million pound Motorway Services Area (MSA), Gloucester Services, located between junctions 11a and 12 of the M5 will open in May 2014. MSA scheme partners Gloucestershire Gateway, a social enterprise, will harness the potential of the MSA for the long term charitable benefit of residents in their target communities in Gloucestershire, two of which are in the most deprived 5% nationally. The MSA will source goods and services from farmers and businesses in Gloucestershire and the South West, and provides an example of a collaborative partnership delivering much needed sustainable regeneration for the local community. The southbound services, supported by GFirst LEP through its Growing Places funding, will open in 2015.	*Growth Zone 4.1.3*

Opportunity	What we've done	What we plan to do
The nuclear and renewables industry in Gloucestershire will grow considerably in the next two decades with construction of a three reactor nuclear power station at Oldbury and a new nuclear power station at Hinkley.	The proposal for development of a Gloucestershire Renewable Energy, Engineering and Nuclear Skills Centre (GREEN) has been devised in partnership with South Gloucestershire and Stroud College to meet the future skills need this will bring.	*GREEN 4.1.2*

3.2 Challenges (Threats)

The SWOT analysis in section 1.2 highlights many of the challenges we face. We have proposals in place to meet those challenges and are confident that with government support we can give a high rate of return on investment to address issues such as:

Challenge	Our Plans
Our productivity challenge - historically the Gloucestershire economy has grown more slowly than the national average.	Our vision is to grow our county's economy by creating an environment that attracts new high growth potential businesses and by targeting those businesses already within the county who operate within high growth potential sectors. ***Business Generator: 4.1.1*** ***GREEN: 4.1.2*** ***Growth Zone: 4.1.3***
Our ambition to support the growth of knowledge-intensive sectors.	Our Growth Hub will include an Accelerated Business Growth Service focusing resources on businesses within these sectors to ensure they have the support they need to achieve and exceed their potential. ***Business Generator: 4.1.1***
The need for innovation to be a stronger driver of productivity.	Innovative businesses and entrepreneurs will be fast- tracked to research and development opportunities through the Business School, other FE institutions and national providers such as the Technology Strategy Board. We have identified three specific opportunities to promote innovation and growth in the county: • Forging stronger links between businesses and the University of Gloucestershire through the Growth Hub; • Capitalising on the knowledge base of the Royal Agricultural University (RAU) through a new Agri-technology Research Centre; • Through the GREEN flagship project and the opportunities in low carbon and nuclear sectors. ***Entrepreneur Programme: 4.1.1*** ***GREEN: 4.1.2***
Capitalising on our entrepreneurial culture.	Our young people will be given support to realise their entrepreneurial ambitions. New businesses with high growth potential will also be actively supported. ***Entrepreneur Programme: 4.1.1*** ***GREEN: 4.1.2***
Developing better links between education and business, and attracting and retaining our talented young people.	By creating the Growth Hub as a partnership between the University of Gloucestershire and GFirst LEP the education & business communities will be brought together in an innovative and exciting way to benefit our students and our local companies. ***Employment Pathfinder: 4.1.1***

3.2 Challenges (Threats): continued

Challenge	Our Plans
Ensuring a ready supply of skilled workforce to support the growth of key sectors where there are specific skills gaps - in 2011, 17% of Manufacturing employers reported that they had one or more members of staff who had a skills gap (significantly higher than the 13% average for all sectors).	Our Growth Hub proposal will address skills shortages through a range of schemes, in particular those skills that support our high growth sectors, such as the STEM subjects. *Employment Pathfinder: 4.1.1* *Gloucestershire STEM Strategy: 4.1.1*
Supporting our rural economy	In our EU Structural and Investment Fund Strategy we have allocated funds to a range of activities to support our rural economy. This revenue funding will be delivered via the 'hub and spoke' activities at the Growth Hub. *Business Navigator: 4.1.1*
Improving our broadband and mobile phone network coverage	We will continue to with the rollout of our Superfast Broadband project (Fastershire) to ensure that companies throughout the county can thrive by their ability to transact business online and on the move. *Business Navigator: 4.1.1*
Gaps in business support including lack of knowledge of how to access those services and/or lack of relationships with the providers of business support services.	We will make it easier to access local business support in our Growth Hub proposal which will provide support for high growth potential businesses and for the younger people we want to encourage to stay or move to Gloucestershire to start-up businesses. *Business Navigator: 4.1.1* *Entrepreneur Programme: 4.1.1*
Resolving infrastructure issues and bringing sites forward	We are addressing infrastructure issues through our Growth Zone - providing space for sustainable business expansion by ensuring the availability of employment land in good locations in the county with the necessary transport infrastructure essential to attract and retain high value-added businesses. *Growth Zone: 4.1.3* *Enablers for Growth: 4.2*

3.3 Building on our strengths and addressing our weaknesses

Sound prospects for growth…

In our Growth Statement we ran forecasts for growth using the Local Economic Forecasting Model (LEFM) to analyse the state of the Gloucestershire economy in 2025 and the model predicts:

- **A steady rise in employment between 2012 and 2025 partly driven by an increase in population;**
- **An average annual growth in employment of 0.8% will amount to the 33,800 additional jobs over the period;**
- **Productivity will increase at an annual average growth rate of 2% leading to a £14.5 billion economy in 2025 (from £11.5 billion in 2007).**

Table 6 shows forecast employment growth across 18 different sectors. The highest quantum of employment growth is forecast in: health (+12,400), business administration and support services (+6,500), construction (+5,700) and accommodation and food services (+4,500) while employment is expected to fall in the wholesale, manufacturing and education sectors.

Table 6: Projected employment change by sector, GFirst LEP, 2012- 2025

			Change	
	2012	2025	Vol	%
1 : Agriculture, forestry & fishing	7,900	8,000	100	1%
4 : Mining, quarrying & utilities	3,600	2,700	-900	-25%
3 : Manufacturing	35,800	35,600	200	-1%
4 : Construction	21,600	27,300	5,700	26%
5 : Motor Trades	6,100	6,400	300	5%
6 : Wholesale	11,400	11,300	-100	-1%
7 : Retail	27,900	30,500	2,600	9%
8 : Transport & storage	9,700	10,500	800	8%
9 : Accommodation & food services	16,700	21,200	4,500	27%
11 : Information & communication	9,100	10,800	1,700	19%
11 : Financial & insurance	10,100	12,600	2,500	25%
12 : Property	3,300	4,500	1,200	36%
13 : Professional, scientific & technical	21,600	23,400	1,800	8%
14 : Business administration & support services	22,400	28,900	6,500	29%
15 : Public administration& defence	18,300	19,300	1,000	5%
16 : Education	27,900	19,500	-8,400	-30%
17 : Health	36,400	48,800	12,400	34%
18 : Arts, entertainment & recreation	17,900	20,500	2,600	15%
	307,700	**341,800**	**34,100**	**11%**

Source: Local Economic Forecasting Model (LEFM), from Exeter University/Marchmont (2013)

Figure 5 shows predicted growth in output across the sectors. High rates of GVA growth are forecast in ICT, property and business services (all key aspects of the knowledge-intensive service sector).

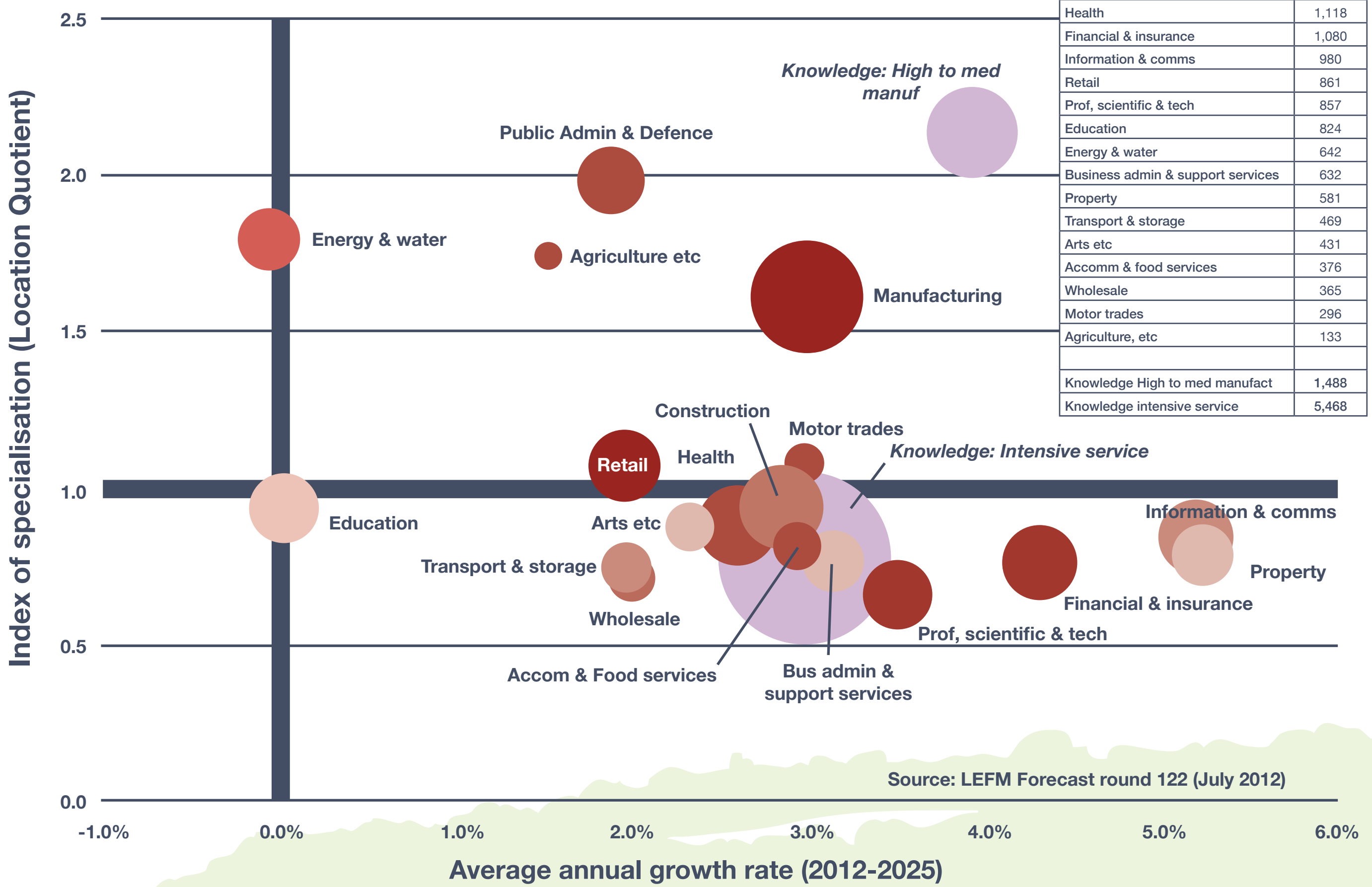
However, the model predicts that the contribution of these sectors to output (based on the forecast location quotients) will remain below the national average. The manufacturing sector is forecast to grow and is expected to continue to be significant in terms of economic output relative to the rest of the UK.

… but potential for stronger growth in Knowledge-Intensive Sectors

The LEFM model provides a 'business as usual' scenario, effectively a picture of the economy without intervention broadly reflecting the continuation of national and local trends. There will always be considerable uncertainty surrounding the future trajectory of the economy and it is the view of the GFirst LEP that the projections may be conservative in light of the economic opportunities in the area.

Figure 5: GVA change 2012-2025

GVA 2025 £m	
Manufacturing	2,449
Public admin & defence	1,306
Construction	1,144
Health	1,118
Financial & insurance	1,080
Information & comms	980
Retail	861
Prof, scientific & tech	857
Education	824
Energy & water	642
Business admin & support services	632
Property	581
Transport & storage	469
Arts etc	431
Accomm & food services	376
Wholesale	365
Motor trades	296
Agriculture, etc	133
Knowledge High to med manufact	1,488
Knowledge intensive service	5,468



Source: Local Economic Forecasting Model (LEFM), This Strategic Economic Plan sets out ambitious plans to accelerate economic growth by focusing on key drivers of productivity and supporting growth in high value sectors. We have identified a number of sector specialisms with high growth potential, where there are strengths on which to build or opportunities to exploit. These sectors have been chosen following consultation from the business community and on the basis of their potential to contribute to accelerated growth. They include:

Nuclear energy – the nuclear-based power generation industry has long been a feature of the Gloucestershire economy and the sector is likely to expand with Horizon Nuclear Power, a UK energy company based in Gloucester, developing a new generation of nuclear power stations to help meet the UK's energy needs.

High tech manufacturing – in particular Aerospace, precision engineering and medical instruments.

Knowledge intensive services including the finance and insurance sectors; the ICT sector (particularly cyber security and creative industries, including digital media) and businesses in professional, scientific and technical activities.

A large vibrant SME community...

In March 2013 there were 29,635 businesses[25] within the area, including a large SME community. Gloucestershire has a marginally higher proportion of businesses employing less than five people (69.5%) compared to the UK average (68.0%)[26]. There were approximately 100 businesses employing 250 or more people.

While the majority of enterprises employ a small number of people, large enterprises (i.e. those that employ 250 or more employees) provide jobs for 50% of Gloucestershire's workers, a figure that is lower than that for England (56%). In Gloucestershire, 15% of employment was within enterprises employing fewer than 10 people, a figure just above the average in England (13%) [27].

…with unexploited potential to export

Among the 39 LEPs across England, Gloucestershire is 1st equal alongside London in terms of the proportion of employment in 'export intensive' sectors.

'Export intensive' sectors are identified at a national level from input-output tables and include both manufacturing and tradeable services. In 2011, approximately 21% of employees worked in 'export intensive' sectors compared to the England average of 17.7%. [28]

While this provides an indication of export potential, measuring actual export performance is harder at a sub-regional scale due to the lack of available data. There is evidence that the South West as a whole is underperforming relative to the UK.[29] While Gloucestershire has some major exporters such as Renishaw, there is no evidence to suggest that Gloucestershire is performing significantly better than the South West region generally.

Boosting exports is recognised in the national Plan for Growth[30] as critical for the successful rebalancing of the UK economy. The greatest opportunities for UK companies are generally accepted to be in activities higher up the value chain where businesses need to be productive in order to compete in international markets. Providing a supportive environment for Gloucestershire businesses to export is therefore important for addressing the productivity challenge and for supporting balanced and sustainable economic growth.

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25. These businesses comprise 'local units' registered for VAT or PAYE of which 25,270 were 'enterprises' (i.e. not branches).

26. ONS (2013) UK Business: Activity, Size and Location.

27. University of Exeter /Marchmont (2013) Gloucestershire - Skills Plan Evidence Base Report

28. ONS Business Register and Employment Survey, 2010-2011

29. University of West of England (2007), 'The Export Performance of Businesses in the South West of England in Comparative Perspective

30. HMG (2011) Plan for Growth

Innovation needs to be a stronger driver of growth

Innovation is frequently identified as one of the key drivers of productivity and growth and is a focus of the Europe 2020 strategy. There are many innovative firms in Gloucestershire and some key innovation assets both within the county (e.g. University of Gloucestershire and the Royal Agricultural University), and outside (e.g. Bristol Science Park).

The number of patents registered per 100,000 residents of Gloucestershire (a proxy for innovation) is broadly average relative to the other LEP areas. In 2009, there were 12.9 patents per 100,000 residents, ranking the area 15th of the 39 Local Enterprise Partnerships.[31] We would need to double the number of patents per 100,000 to become a top 10 ranking area for innovation.

As a predominantly rural county with existing expertise in agri-technology, GFirst LEP and the HE and FE land based institutions in Gloucestershire[32] fully support the government's vision that 'the UK becomes a world leader in agricultural technology, innovation and sustainability' which, as one of the "Eight Great Technologies"[33] will drive the economic recovery and growth of the UK.

The major opportunity this technology will bring is in development of the economic potential of the wider food supply chain and alignment with the government's long term Agri-technology strategy, by undertaking high calibre Research & Development and translating this and other specialised research output into practical applications that can be readily adopted.

The UK agricultural technologies strategy[34] published by government in 2013 emphasises the role of industry partnerships. GFirst LEP recognises the economic and policy importance of this industry and the opportunities that it provides for Gloucestershire as a rural county with existing expertise and facilities.

If we are to address the productivity and growth challenges in Gloucestershire, more needs to be done to support innovation. Our Growth Hub flagship project will fast track innovative businesses and entrepreneurs – more information on this can be found in section 4.

An entrepreneurial culture with high survival rates

There is a positive entrepreneurial culture in Gloucestershire, and businesses starting up have very high survival rates. The self-employment rate in September 2012 was 11.7%, above the national average (9.8%) and the 7th highest of all LEPs outside London.[35] In 2011, there were 67 new businesses per 10,000 working age population in Gloucestershire, broadly in line with the England average (69) but above the South West average (60).[36] The start-up rate varies significantly across the LEP area. The Cotswolds had nearly twice as many start-ups per population of 10,000 (97) as Gloucester (47) and the Forest of Dean (49).[37]

We have very high rates of business survival, 94.1% of enterprises born in 2008 survived for one year, 78.7% survived for two years, and 63.6% survive for three years.[38] In this respect Gloucestershire ranks 2nd of the 39 LEPs.

We want to capitalise on this entrepreneurial culture to drive economic growth, maintaining our high start-up and survival rates. In order to boost productivity, we need to support start-ups in high value sectors and ensure that our entrepreneurs have access to the business support and skills they need to move up the value chain.

31. The LEP Network (2012) 'Creating successful local economies: Review of Local Enterprise Partnership area economies in 2012

32. Royal Agricultural University and Hartpury College

33. http://bit.ly/1gx2kYW

34. http://bit.ly/1hha0OB

35. ONS Annual Population Survey, Oct11-Sept12, sourced from The LEP Network (2012)

36. ONS Business Demography 2011 and Annual Population Survey 2011

37. It should be noted that this dataset refers only to businesses that meet the criteria that require them to register for VAT and/or PAYE.

38. ONS Business Demography 2011, sourced from The LEP Network (2012)

We have identified an ambitious but realistic growth target for Gloucestershire. We believe that the county has the potential and aspiration to deliver productivity-driven growth above the national average and give a high rate of return to Government.

Our vision is to grow our county's economy by creating an environment that attracts new high growth potential businesses and by targeting those businesses already within the county who operate within high growth potential sectors.

We have undertaken an extensive consultation process with the business and wider communities of Gloucestershire which ultimately has resulted in development of Plans for Growth around the following three key flagship projects. Section 8 provides further details of our engagement strategy.

4.1 Flagship Projects

Our three new flagship projects are:

GLOUCESTERSHIRE growth hub   GREEN   GLOUCESTERSHIRE growth zone

These will ensure that we exploit the opportunities available to us and tackle our past weaknesses.

This section provides a detailed description of each flagship project. A full Business Case has been developed for the major component parts of each project, and these are provided as Appendices.

4.1.1 Growth Hub

'We see the Growth Hub and the close links with the Business School as championing skills development in Gloucestershire and closing the skills gap with what companies need to successfully grow their business.'

Adam Starkey, CEO, Green Gourmet

GFirst LEP and the University of Gloucestershire recently announced exciting plans for development of a Growth Hub with investment from the Higher Education Funding Council for England.

The Growth Hub and its associated network of Resource Centres and STEM specific locations (or spokes) across the county will provide an infrastructure and environment to deliver growth by providing services for businesses, education providers and individuals alike.

The Growth Hub, which is consistent with BIS/Cabinet Office models[39] for growth, will:

- **Bring together both local and national and public and private sector offers;**
- **Map local schemes and programmes and simplify the business support landscape by eliminating duplication of effort, closing down initiatives not offering value for money;**
- **Make use of national assets e.g. Helpline and web-based content in order to avoid duplication and achieve value for money.**

A second phase of our Growth Hub plans will create a joint venture partnership, attracting private investment to support major expansion.

The hub will be the home for two distinct but linked support themes - Accelerated Business Growth Service and Enterprise Accelerator - and will be the focal point for a range of business and related services.

39. Growth Hubs and Partnerships: An improved business support offer. Karen Leigh, Assistant Director, Growth Hub Implementation Strategy at Department for Business, Innovation & Skills. December 2013

Accelerated Business Growth Service

The Growth Hub will focus intervention support only on the key growth businesses in the Knowledge, Innovation and Export Intensive sectors, directing other businesses to existing support (GreatBusiness.gov etc.).

With London, Gloucestershire has the highest employment in Export Intensive sectors in the country. In 2011, approximately 21% of employees worked in 'export intensive' sectors compared to the England average of 17.7%.[40]

Despite this there is evidence to suggest they are not fulfilling their potential to export - evidence indicates that the South West as a whole is underperforming relative to the UK.[41]

While Gloucestershire has some major exporters such as Renishaw, there is no evidence to suggest that Gloucestershire is performing significantly better than the South West region generally.

Through the provision of workshops facilitated by the Growth Hub Accelerated Business Growth Service, the Growth Hub will target these businesses in a way not currently available and will lead them to take up existing services - evidence from the Export Club in Gloucestershire indicates that there is a willingness to consider export but a lack of confidence and knowledge in how to do so.

A similar approach will be taken when supporting businesses in the Knowledge Intensive and Innovation sectors.

40. ONS Business Register and Employment Survey, 2010-2011

41. University of West of England (2007), 'The Export Performance of Businesses in the South West of England in Comparative Perspective

GLOUCESTERSHIRE growth hub

The Accelerated Business Growth Service comprises the following:-

Accelerated Business Growth Service

Business Generator	Business Navigator	Business Expansion Service

Business Generator will focus on key growth sectors where specific support will enhance and increase their chances of success, and comprise an integrated start-up, business clustering and support service including both new and current provision;

Helping new and young businesses to improve their performance and create new jobs, Business Generator will offer new options for local graduates (aligned with Enterprise Accelerator) such as working on collaborative research and development projects across the county.

A full Business Case has been developed for Business Generator and can be found in Appendix 1B.

Business Navigator will identify high growth potential growth businesses for specific targeted support, ensuring that those businesses in the knowledge and export intensive sectors fully realise their potential.

It will also direct other businesses i.e. those without high growth potential, to support services currently available locally and nationally.

A full Business Case has been developed for Business Navigator and can be found in Appendix 1C.

Business Expansion Service is aimed at strategically important businesses bringing inward investment to the county, and will ensure they can access the resources they need to achieve their growth potential, thereby encouraging those businesses to remain in the county to invest in growth and jobs

Similarly the Business Expansion Service will support key 'home grown' businesses.

A full Business Case has been developed for Business Expansion Service and can be found in Appendix 1D.

Enterprise Accelerator

This element of the Growth Hub will be distinctive for the integration of the LEP and University of Gloucestershire with Higher and Further Education and will provide a virtual and physical hub delivering services for education providers and individuals.

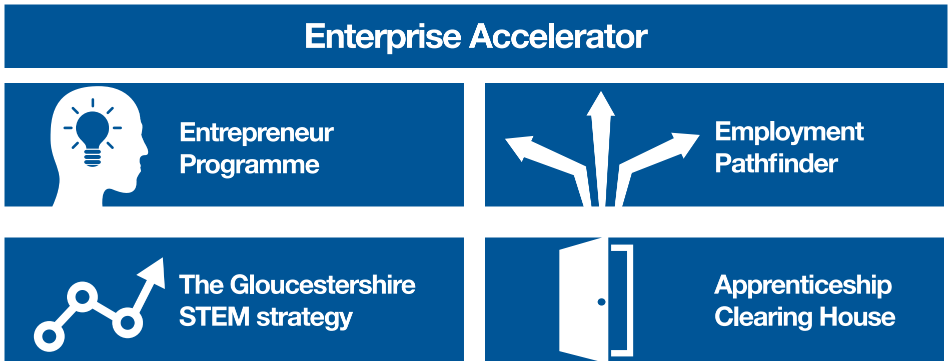
Employability skills are often cited by employers as lacking in young people when they first enter the world of work.

In a recent survey of Gloucestershire's employers and schools,[42] when asked 'which of the following key areas of skills provision for 14- 19 year olds do you feel needs to be improved?', the intervention most frequently identified as a priority was 'Preparing school leavers better for work'. 70% of respondents identified it as among their five most important priorities.

Enterprise Accelerator will support schools and other education providers in delivering the skills needed by employers of the future and without which there is a danger that businesses, unable to recruit locally, are forced to either import skills to the county or relocate in search of a stronger skills base.

A similar proactive approach will be taken with regard to early identification of entrepreneurs, encouragement of self-employment and business start-ups etc. together with the provision of careers advice; a focused approach to apprenticeships; and development of a STEM strategy.

Enterprise Accelerator comprises the following:-



The **Entrepreneur Programme** will support the development of entrepreneurs of any age by providing the skills needed to develop and grow a successful business by identifying those with potential at an early age – while still at school, college or university – and offering guidance to nurture them by providing these individuals with the knowledge, support and confidence to develop their business initiatives.

A full Business Case has been developed for Entrepeneur Programme and can be found in Appendix 1E.

Employment Pathfinder will provide the tools, knowledge and strategic planning activities to enable schools and colleges to offer students the information advice and guidance they need to decide their future careers;

Two important recent studies[43] (one US, one UK) have demonstrated powerfully the ways in which young people can secure significant benefits from the information and encouragement that effective careers advice can provide;

Working with employers, Employment Pathfinder will provide help and advice on recruitment issues including direct support for work placements, apprenticeships, graduate placements or recruitment;

Employment Pathfinder responds to the recommendations in the Department for Education and Department for Business Innovation report - Skills Careers Guidance Action Plan September 2013.[44]

Employment Pathfinder will also 'signpost' to other services such as Jobcentre Plus, sector academies or recruitment agencies.

A full Business Case has been developed for Employment Pathfinder and can be found in Appendix 1F.

42. Skills Statement – Marchmont Observatory, University of Exeter November 2013

43. http://www.inspiringthefuture.org

44. http://bit.ly/1l9D1wd

The Gloucestershire STEM strategy

A report commissioned by Gloucestershire LEP in 2012[45] reported that - 'The key issues affecting young peoples' decision to study STEM subjects were:

- **The lack of inspirational teachers and a science curriculum irrelevant to modern living;**
- **Negative stereotypes often reinforced by the media, family and peers, regarding those who succeed in STEM subjects and careers;**
- **Negative perceptions of STEM careers and occupation whereby STEM subjects are not seen as a passport to lucrative and interesting jobs and careers.'**

The Gloucestershire Skills Plan Evidence Base Report[46] stated that making STEM education interesting, fun and relevant to the lives and aspirations of young people, both male and female, must start at an early age. Large employers appreciated the importance of this agenda however more needs to be done, more employers needs to be engaged and it is a potentially complex environment to understand and engage with, especially for SMEs.

The Gloucestershire STEM strategy will align STEM education capability with STEM sector industrial growth and demand by:-

- **Providing facilities and resources to present STEM in an interesting, engaging and challenging way;**
- **Creating clear progression routes into industry by enabling employers to forge partnerships with schools, colleges and universities;**
- **Making STEM learning relevant to the workplace.**

A full Business Case has been developed for the Gloucestershire STEM strategy and can be found in Appendix 1A.

Apprenticeship Clearing House

Utilising the successful UCAS model the Apprenticeship Clearing House will increase the uptake of apprenticeships among employers and young people. By raising the profile of SME vacancies, the clearing house will 'recycle' unsuccessful candidates, improve candidate 'readiness', support progression to Higher Apprenticeship programmes and support employer-led apprenticeship delivery.

Collectively these services will firmly establish strong relationships between the business and education sectors and encourage development of an enterprise culture in the county's schools, colleges and universities.

This will encourage more young people to consider alternatives such as self-employment and business start-ups as viable career paths and provide support in development of their business ideas at the earliest opportunity.

From a different perspective this will support our efforts to retain young people in the county.

The broad range of services offered by the Growth Hub will directly address some of the key obstacles to growth in Gloucestershire by:-

- **Providing targeted support to businesses with high growth potential;**
- **Establishing a clear alignment of the business and education sectors;**
- **Raising standards in the county in relation employability skills and qualifications.**

As a result our high growth potential businesses will achieve their potential and we will have a ready supply of talented employees or entrepreneurs in the future.

A full Business Case has been developed for the Apprenticeship Clearing House and can be found in Appendix 1H.

45 . Manufacturing and STEM Skills in Gloucestershire April 2012

46. Marchmont Observatory, December 2013.

4. Growth Programme

Table 7 growth hub			Single Local Growth Fund		EU Structural & Investment Funds	Other Sources of Funds:				Benefits as a result:						
						Public		**Private**								
	Capital	Revenue	2014-2021	2015/2016		Details of Source	Amount	Details of Source	Amount	Jobs	Jobs	2015/16	Qualifications	2015/16		GVA ***
Growth Hub										Support	150	25	STEM			2015-2021
Growth Hub		1.00						GFirst	1.00	Accelerated	300	50	L2	2,800	467	135.915
Growth Hub		2.70				HEFCE Catalyst Bid	2.7			Business Starts	1,200	200	L3	1,746	291	2015-2016
Growth Hub	10.00		10.00	5.00						Start up Growth	3,840	-	L4	228	38	22.653
Growth Hub		3.50						University of Gloucestershire	3.50	Consultancy	750	125	L4+	48	8	
Growth Hub	20.00							JV Partner*	20.0	Employability	1,442	240	Total:	4822	804	
Business Generator		1.90			1.90					Graduate jobs	321	53				
Business Navigator		5.49			5.49					Business Expansion	4,320	720				
Business Expansion Service										Entrepreneurs	555	92				
Entrepreneur Programme		1.89			1.89					Entrepreneurs	84	14				
Entrepreneur Programme		0.096	0.096	0.016						Pathfinder	360	60				
Entrepreneur Programme		1.38						Business in kind	1.38	Pathfinder	1,200	200				
Entrepreneur Programme		1.26						Students in kind	1.26	Pathfinder	300	50				
Entrepreneur Programme		0.716						mentors	0.716							
Entrepreneur Programme		0.112						Businesses in schools	0.112	***TOTALS***	***14,822***	***1,829***				
Entrepreneur Programme		0.30				Colleges in kind	0.30			***Apprenticeships***	***4,221***	***703***				
Employment Pathfinder		0.77			0.77					***combined total***	***19,043***	***2,532***				
Employment Pathfinder		0.14						Volunteer hours	0.14							
Gloucestershire STEM Strategy	2.00	1.65	2.0	1.5	1.65											
Gloucestershire STEM Strategy		0.039						Volunteer hours	0.039							
Gloucestershire STEM Strategy	2.975	1.69				Colleges	4.665									
Gloucestershire STEM Strategy	0.10							Private (Klass)	0.1							
Apprenticeship Clearing House**		1.70			1.70											
Innovation		0.85			0.85											
Totals:	**35.075**	**27.183**	**12.096**	**6.516**	**14.25**		**7.665**		**28.247**							

See Appendicies 1A-1H for Outputs and Calculations

* Joint Venture Partner: This remains speculative and subject to further negotiations as outlined on pg 46. Currently the identity is confidential for commercial reasons.

**The value in cash and kind from employers taking on apprentices has not been included

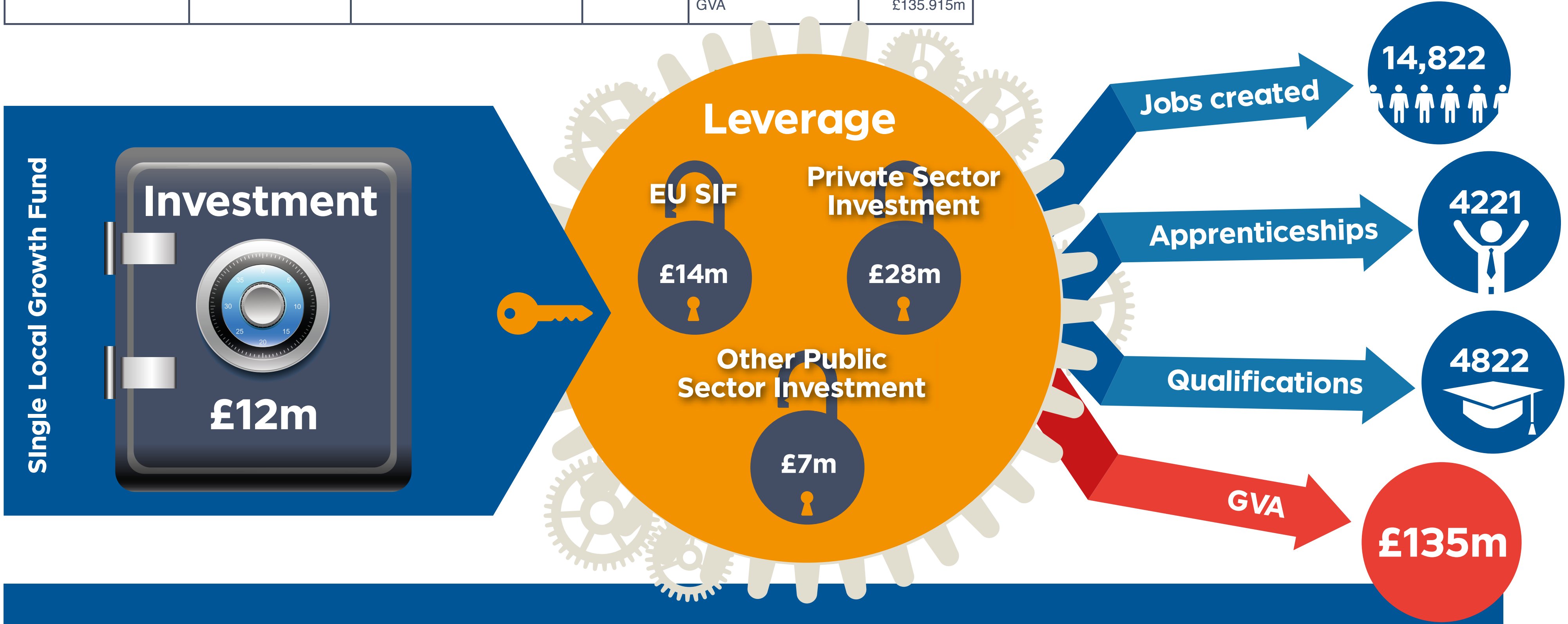
***GVA calculated on an average return of 5:1 on revenue investment revenue of £27.183 x 5 = 135.915 over 6 years = average £22.653 pa

4. Growth Programme

Value for Money

Table 8

Investment		Leverage		Outputs	
SIngle Local Growth Fund	12.096	EU SIF	14.25	Jobs	14,822
		Other Public Sector Investment	7.665	Apprenticeships	4221
		Private Sector Investment	28.247	Qualifications	4822
				GVA	£135.915m



Value for Money Statement: (2015-2021)

For an investment of £12.096m from the Single Local Growth Fund, £14.25m will be leveraged in from the EU SIF, £7.665m from other Public sources and £28.247m from Private sources. As a result we will create 14,822 Jobs, 4221 Apprenticeships, 4,822 Qualifications and GVA uplift of £135.915m.

4.1.2 Gloucestershire Renewable Energy, Engineering & Nuclear Skills Centre (GREEN)

'Nuclear power is, and will continue to be, a key part of our low-carbon energy mix alongside renewable generation and Carbon Capture and Storage. All of these technologies are important in tackling climate change and diversifying our supply, contributing to the UK's energy security and growth."

Rt. Hon. Vince Cable MP B.I.S.
Rt. Hon. Ed Davey MP D.E.C.C.
HM Government March 2013.

Gloucestershire is of national significance with many regional, national and international businesses providing intellectual, strategic and operational services to the engineering, low carbon and nuclear industries from within the county.

The GREEN Skills Centre will redevelop the largely disused and redundant public sector brownfield site in an innovative and inspiring way to provide a training centre of excellence to respond to the massive growth in demand for STEM skills from the renewable energy, engineering and nuclear sectors. The initial plans for redevelopment will provide the UKs first zero carbon Skills Centre, regenerating the site and providing new employment opportunities in the local area.

The proposed site is a former nuclear research facility at Berkeley which is capable of accommodating a unique and influential Skills Centre to be used for the development of Science, Technology, Engineering & Maths (STEM) skills. These skills are vital to deliver future economic growth and to maximise the return to the UK economy from major infrastructure projects.

The GREEN Skills Centre will be a key enabler for economic growth in Gloucestershire, neighbouring counties and the region as a whole and has the opportunity to lever significant resources from partners working across both the public and private sectors. The Skills Centre is well placed to operate as either a 'hub' or 'spoke' as part of the Government's commitment to provide a 'New Nuclear College' [47]

47. Press Release by Matthew Hancock MP, Business Innovation & Skills, 28th January 2014 entitled: Nuclear college to harness the power of skills training. http://bit.ly/1jC6HoF

The GREEN Skills Centre will achieve the following economic objectives:-

- **Return a greater value of investment from 'new nuclear' to the UK supply chain[48];**
- **Provide a greater number of STEM jobs demanded in Gloucestershire[49]**
- **Encourage greater social mobility; potentially backfilling the skills drain from major infrastructure projects;**
- **Encourage innovation, entrepreneurship and new business start-ups. Gloucestershire has above average success for new businesses[50];**
- **Address the skills needs and economic opportunities offered by low carbon industries;**
- **Provide potential to react to demands, whilst growing and adapting to provide new technology skills as required.**

The GREEN Skills Centre also forms an effective way for the Government to achieve its stated ambitions and concerns:-

- **For the UK nuclear industry and its approach to skills and workforce development to be recognised as an example of international best practice[51]**
- **Meeting the current and future need for engineering and technician skills[52]**
- **About one fifth of all vacancies in the wider construction sector are persistent and hard to fill because employers cannot recruit staff with the right skills, qualifications and experience.[53]**

48. Oxford Economics 2013; also OECD report with Government support 63% (increase of 10%) of the investment in new nuclear can be retained in the UK

49. NEF, 2014; also 13% (above national average) of Gloucestershire jobs in Engineering & Technology and over 100 vacancies (Feb. 2014)

50. NEF, 2014; also Gloucestershire has a successful track record supporting new business start-ups with 63.5% still operating after the 3 years

51. Nuclear Industrial Strategy -The UK's Nuclear Future 2013

52. Offshore Wind Industrial Strategy – Business and Government Action, 2013

53. UK Construction: An economic analysis of the sector, 2013

South Gloucestershire and Stroud College (SGS) have agreed the basis for the acquisition of the site at Berkeley with the site's current owner, the Nuclear Decommissioning Agency (NDA) and will lead the GREEN Skills Centre, delivered in partnership with the GFirst LEP and education providers in the county and nationally.

The project site is ideally located, just 10 minutes from the M5 & M4 interchange; an hour's drive from Hinkley Point C; 5 miles from Oldbury B; and close to Gloucestershire's energy, nuclear and supply chain employers.

The project will raise publicity and aspirations, attracting young people to STEM careers; provide skilled people to fill the skills drain created by infrastructure projects; provide a focal point for innovation, business start-ups and low carbon energy generation; and provide specialist 'full cost recovery' and commercial training opportunities.

This project is fully supported by West of England LEP; South Gloucestershire Council; and by Bridgwater College as an existing supplier of engineering training in the region. The following employers have also committed their support:-

- **Magnox ;**
- **Doosan Babcock;**
- **Horizon Nuclear Power;**
- **Ecotricity;**
- **EDF;**
- **Atkins;**
- **AMEC.**

Partners and stakeholders have been consulted and contributed to the project plan including:-

- **Stroud District Council;**
- **NSAN;**
- **South Gloucestershire Council;**
- **Heart of South West LEP;**
- **Bridgwater College;**
- **The NDA;**
- **Berkeley Site Stakeholder Group.**

Our plans include close liaison with other Nuclear Skills Centres and the proposed "New Nuclear College" to ensure appropriate linkages are in place; and our consultation with Heart of South West LEP will continue in order to ensure appropriate cross-referencing and avoid duplication.

Stroud District Council, the relevant local planning authority, support the project and plan to encourage further inward investment, thereby unlocking the potential of this site to become the focal point for engineering training within Gloucestershire.

The National Skills Academy for Nuclear (NSAN) have been instrumental in the development of the project and together with Cogent, the sector skills council for process industries, have supported and advised on the future skills needs and potential shortages in the sector.

Gloucestershire has a long established heritage and expertise in the Nuclear, Energy and Manufacturing sector with major employers for this sector located in the county. The South West has a high proportion of nuclear skills employment with 3600 employed in decommissioning and power generation. 65% of the nuclear workforce will retire by 2025. This provides the potential and need to add to the existing technical, construction and scientifically skilled staff with an estimated need of 700 apprenticeships and 150 graduates a year over the next 15 years.

This project will ensure there is a continuous supply of adequately trained, skilled and qualified workforce for the planning, construction and operation of the nuclear projects whilst maintaining the skills need of existing companies in the low-carbon, construction and engineering industries in Gloucestershire. This additional capacity cannot be met by existing providers in the region.

If we do not meet this skills challenge we risk a significant proportion of the uplift from the nuclear industry being lost to the local and UK economy and we will miss the opportunity to grow the skills needed by the emerging STEM industries.

A strong working partnership has been established with Bridgwater College, the Hinkley Point Training Agency (HPTA) and the National Skills Academy for Nuclear (NSAN). The GREEN Skills Centre is well placed to act either as a 'hub' or 'spoke' of the proposed "New Nuclear College". SGS College has also developed strong links with the local and regional supply chain to fully understand their pressures and requirements.

SGS has established strong and effective links with employers in the nuclear sector and is one of only two National Skills Academy for Nuclear (NSAN) quality approved providers in the South West. In addition, SGS has delivered skills training to the low carbon and green sectors for many years. This work is vital to our plans and those of neighbouring LEPs.

Engineering, Manufacturing, Science & Technology

Businesses in engineering, manufacturing and technology across the region already compete for highly qualified and skilled people. Businesses operating in these sectors are at constant risk of losing staff in a skills drain to major infrastructure projects. This problem can only be addressed if a greater number of skilled staff can be made available.

The Green Skills Project's close links with Higher Education (HE) institutions (SGS is an associate Faculty of the University of Gloucestershire) and partnerships with Colleges and Private Training Providers, provide for the delivery of skills from Business and Technology Education Council (BTEC) Level 2 to Level 7.

Low Carbon & Construction & Engineering-Construction

The GREEN skills project will support low carbon initiatives closely working with industry partners e.g. Ecotricity to install a wind turbine 'rig' to enable specialist training to take place. This will include rope access and provision to ensure effective syncing to the national grid.

The project will allow partners such as Severn Wye Energy Agency to further grow their delivery of training provision and support for businesses to help them increase energy efficiency and install renewable energy technologies. It will provide for University research, exploiting the site's proximity to the Severn estuary, as an excellent test bed for solar, wind, and tidal energy, and complementing the growth of University of Gloucestershire's engineering offering.

A full Business Case has been developed for the GREEN Skills Centre and can be found in the Appendices.

Table 9 GREEN	Capital	Rev-enue	Single Local Growth Fund 2014-2021	Single Local Growth Fund 2015/2016	EU Structural & Investment Funds	Other Sources of Funds: Public – Details of Source	Public – Amount	Committed?	Private – Details of Source	Private – Amount	Committed?	Benefits as a result: 2015-2021 – GVA £	Jobs	Qualifications
GREEN												Job related:	Training related:	1,286
Premises & Land	5.00					NDA (site)	5.00	yes				21m	15,000	Apprentice-ships:
Premises & Land*	5.00		5.00	5.00								Employment	Hinkley & Supply Chain	1,200
Revenue		5.95			5.95							land related:	3,000	
Private Investment**	19.50								Private Investment **	19.5	no	58.32m	Business starts & On site	
SGS Site lease***		2.55				SGS Site lease	2.55	yes				Total: 79.32m	220	
Income		0.90				Rental income **** (15 yr)	0.90						Total: 18,220	
Income		3.00				SGS training (2yr)	3.00						Jobs Protected	
Total	**29.50**	**12.40**	**5.00**	**5.00**	**5.95**		**11.45**			**19.5**			**Total: 2,125**	

* FE Capital within SLGF

** Estimated Single Private investment £19.5 million based on similar arrangement at Bridgwater. Details subject to commercial confidentiality

***SGS Site lease: over 5 years

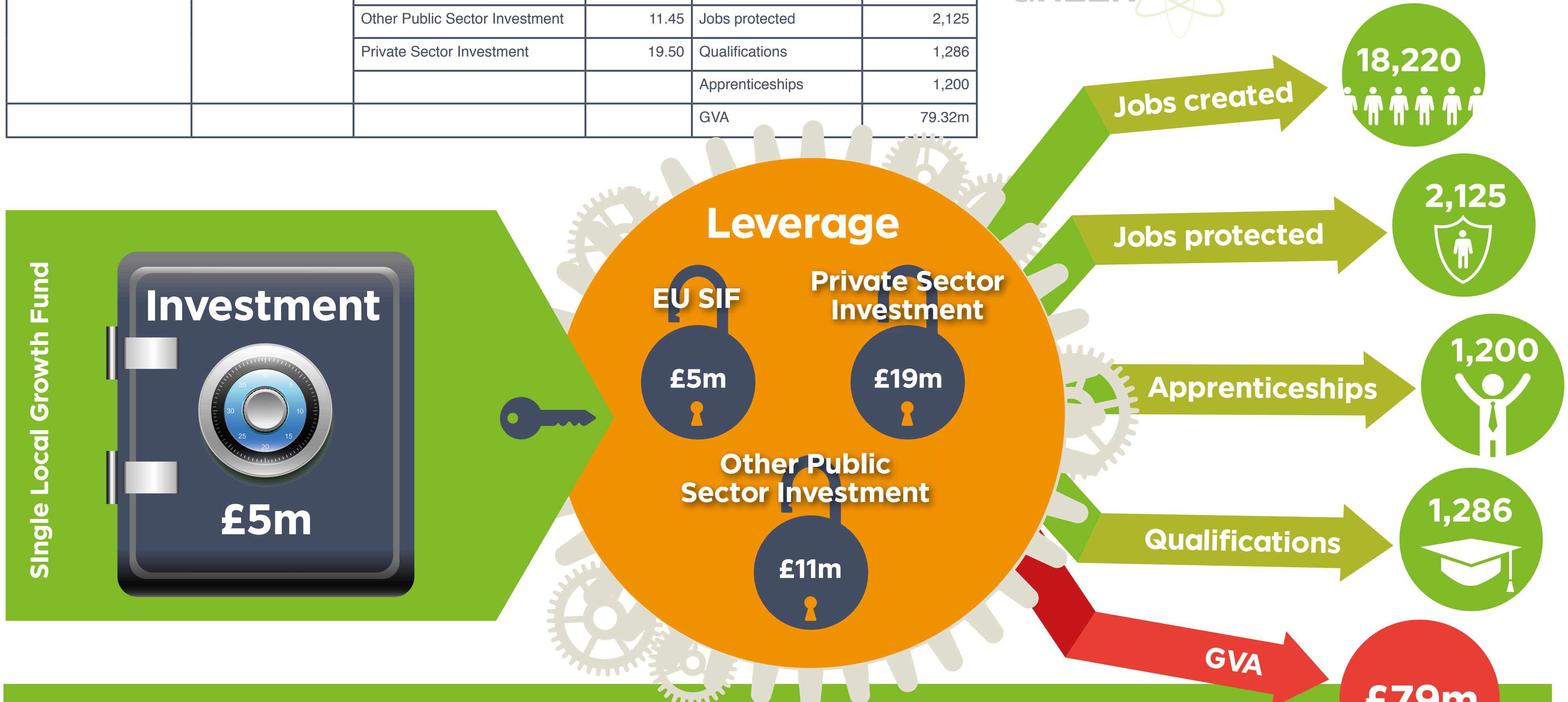
****Rental income over 15years

See Appendix 2 for Outputs and Calculations

Value for Money

Table 10

Investment		Return		Outputs	
SIngle Local Growth Fund	5.00	EU SIF	5.95	Jobs created	18,220
		Other Public Sector Investment	11.45	Jobs protected	2,125
		Private Sector Investment	19.50	Qualifications	1,286
				Apprenticeships	1,200
				GVA	79.32m



Value for Money Statement: (2015-2021)

For an investment of £5m from the Single Local Growth Fund, £5.95m will be leveraged in from the EU SIF, £11.45m from other Public sources and £19.5m from Private sources. As a result we will create 18,220 Jobs, protect 2,125 jobs , achieve 1,286 qualifications, 1,200 Apprenticeships and a GVA uplift of £79.32m.

4.1.3 Growth Zone

'There have been recent enquiries from medical firms and others in similar fields which have had to be turned away due to a lack of suitable premises"

GFirst LEP Construction & Infrastructure Sector Group

The primary aim of the Growth Zone is to ensure the availability of quality employment land in proximity to the M5 motorway attractive to businesses and with excellent connectivity throughout Gloucestershire and the rest of the UK. This will serve latent demand in the marketplace and provide the space required to enable Growth Hub supported businesses to grow.

Our plans for delivery of this employment land around Junctions 9 and 10 of the M5 are supported by a number of transport related proposals across the county which will enable the growth to be achieved through release of this employment land.

Many of these are feeder routes associated with the motorway junctions in the Growth Zone, which allow access to the wider economic base of the county, several of which are within the Joint Core Strategy (JCS) of Cheltenham, Gloucester and Tewkesbury; the local plans of Cotswold, Forest of Dean and Stroud; and projects approved by the Local Transport Board.

Focused on the M5 motorway corridor, the Growth Zone will provide space for sustainable business expansion by ensuring the availability of employment land in the best locations in the county with the necessary transport infrastructure essential to attract and retain high value-added businesses.

Employment Land at M5 J9

GFirst LEP support the 3 major proposed developments on the A46 adjacent to M5 J9 that, in total, will produce an annual GVA of £74m and 3300 jobs with no immediate cost to the public purse. In addition we will work with Worcestershire LEP, DfT, Highways Agency and the Local Authorities on a long term transport solution to the A46 congestion in advance of the release of the MOD site of circa 80 ha for employment and housing.

Developable land around J9 at Ashchurch is allocated/proposed to be allocated for three major new employment sites providing 98 hectares of new employment land.

- **Sainsbury's have obtained planning permission from Tewkesbury Borough Council (TBC) for a new 6300 sqm retail store on a Brownfield site of circa 4ha at Easter Park situated on the A46 adjacent to the J9 junction to the east. This is currently with DCLG for approval in view of the size of the scheme. If successful it will provide circa 300 local jobs and a GVA of circa £6m per annum.**
- **A second site, located on the A46, is the subject to a planning application for a Retail Outlet & Garden Centre development by Robert Hitchins Ltd (RHL). The development of the 14ha site costing £35m will provide 1000 jobs on completion and 175 jobs during the construction phase in the M5 Growth Zone. The estimated GVA is £28m per annum. Again there is a strong emphasis of availability by public transport. If the planning application is successful it will again be subject to approval by DCLG in view of its size.**
- **The most important of these projects is the Ministry of Defence (MOD) site at Ashchurch. Situated to the east of J9 on the A46, it is due to be decommissioned, and we understand the earliest likely closure date to be December 2016.**
- **Whilst currently allocated for housing and employment land development it is not guaranteed to come forward within the timescale of the SEP and when it does come forward it is likely to require remediation work before being suitable for redevelopment.**
- **The current proposal is that ¼ of the site, 20ha, will be allocated to employment land. This could create circa 2000 jobs, generating £40m GVA as medium density office employment usage.**

Our proposal here is to define and accelerate the release date of the MOD site to release the jobs and GVA opportunity; and support Sainsbury's and RHL planning applications in view of the opportunity for jobs and the impact on GVA with little cost to public purse.

The transport issues arising from this proposal will be addressed by the Business Case for the M5 Junction 9 Transport Strategy and a full Business Case has also been developed for Employment Land at M5 J9; both can be found in the Appendices.

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Expansion of Employment Land at M5 J10

There is a major opportunity for significant development at Junction 10. The draft Joint Core Strategy currently allocates 23ha of employment land at North West Cheltenham adjacent to Junction 10 on the M5. It also safeguards an additional 150 ha of land to meet the future housing and employment growth needs of Cheltenham and Tewkesbury beyond 2031, which presents a major opportunity to deliver future growth at this location.

Information provided by the GFirst LEP Construction & Infrastructure Sector Group confirms that there have been recent enquiries from medical firms and others in similar fields for premises in or around Cheltenham which have had to be turned away due to lack of suitable premises.

Similarly, when local firms grow and expand, they often struggle to find suitable premises in and around Cheltenham and, rather than relocating further afield in Gloucestershire, can be lost to areas such as Bristol and Birmingham.

Two reports have been commissioned from Nathaniel Lichfield & Partners (NLP) to quantify the employment land required at J10. One has been commissioned by the Joint Core Strategy to revisit a modelling exercise based on historical data, and the other by GFirst LEP to quantify the scale and nature of likely demand for employment land.

The final reports are due in April 2014 but provisional findings indicate there is some evidence of demand. Further investigations are underway and the outcomes of these are expected to be available at the start of the growth deal phase.

The justification for a junction upgrade to all-movements rests on this potential to unlock a strategic employment and mixed use site which will attract significant new growth and jobs.

Employment development around Junction 10 could provide a high profile anchor for the M5 Growth Zone concept, with up to 6500 jobs for new residents in the neighbouring urban extension of 4500 houses proposed by the JCS. In addition it will meet existing latent demand for high quality space near to Cheltenham and build on the existing strengths of the South West advanced manufacturing, aerospace/ engineering and nuclear research sector. It will also potentially provide incubator space to support emerging regional strengths in food processing and renewable technologies.

Discussions with one of the major landowners between North West Cheltenham and junction 10 (Bloor Homes) suggest that they would be interested in developing the land if allocated.

Increasing the capacity of the motorway junction will also reduce the risk of journey time uncertainty and increase the desirability of development land in NW Cheltenham. For more information please see the Business Case: M5 J10 - all movements.

A full Business Case has been developed for Expansion of Employment Land at M5 J10 and can be found in Appendix 3B.

Table 11			Single Local Growth Fund		EU Structural & Investment Funds	Other Sources of Funds:				Benefits as a result: 2015-2021		
						Public		**Private**				
	Capital	Revenue	2014-2021	2015/2016		Details of Source	Amount	Details of Source	Amount	GVA £	Jobs	Housing
J10 Land only	105							Private Developers	105*	278**	**867	1,100
J9 Land only												2,100
Total	**105**											

* Private investment based on estimated cost of developed land at £350K per acre
(Estimated :land value (£275 per acre) + servicing & Infrastructure (£75 per acre)
150ha (370 acres)
10 acres per annum = £35m pa Years 2018 -2021 3 years at £35m = £105m

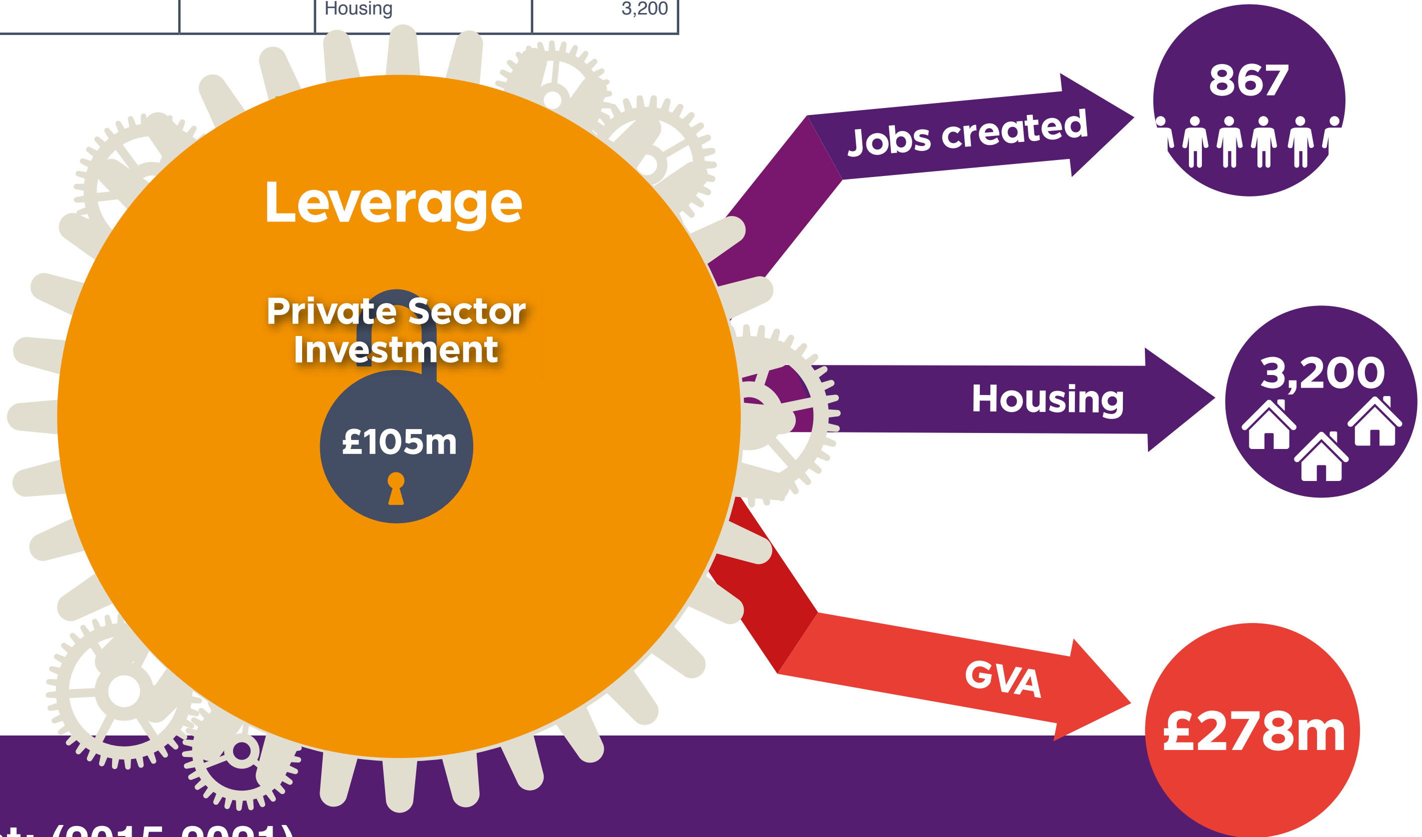
See Appendices 3A (J9) and 3B (J10) for Outputs and Calculations.

** J10: GVA J10 based on 139m pa over 2019/21 (Arup Report)
*** J10: Based on 6,500 jobs for 150ha, over 2 years 20 ha pro rata = 867 jobs (Arup Report)

Value for Money

Table 12

Investment		Return		Outputs	
SIngle Local Growth Fund		Private Sector Investment	105	Jobs created	867
				GVA	£278m
				Housing	3,200



Value for Money Statement: (2015-2021)

There is no ask of Government from the Single Local Growth Fund, however key transport initiatives (see ‘enablers for Growth’Appendices 4A-D) will make a significant contribution to these initiatives.

4.2 Enablers for Growth

4.2.1 Transport Projects

'Although increased demand for the road network can often be driven by economic growth, the presence of congestion can also hold back further growth as more time is spent travelling at the expense of other productive activities. In addition, the inability to accurately predict journey times due to congestion can result in wasted time as individuals either arrive late for appointments or arrive early by allowing too much time for their journey." [54]

Department for Transport

In section 4.1.3 we describe the primary aim of the Growth Zone as being to ensure the availability of quality employment land in proximity to the M5 motorway attractive to businesses and with excellent connectivity throughout Gloucestershire and the rest of the UK.

There are a number of other important sites across the county contributing to Gloucestershire's commitment to growth, several of which are within the Joint Core Strategy of Cheltenham, Gloucester and Tewkesbury; the local plans of Cotswold, Forest of Dean and Stroud; and projects approved by the Local Transport Board.

Many of these are transport related as there are a number of feeder routes associated with the motorway junctions in the Growth Zone, which allow access to the wider economic base of the county. Some of these are already attracting heavy investment by the Highways Agency and Gloucestershire County Council, particularly along the A40 north of Gloucester.

54 . DfT 2013: An Introduction to the DfT's Transport Congestion Statistics' par. 2.3

4.2.1.1 The A417 'Missing Link' [55]

A 5km section of the A417, known locally as the 'Missing Link', is the only section of single carriageway at the Gloucester/Cheltenham end of the 50km A417/A419 route linking the M4 at J15 near Swindon to J11a of the M5 near Gloucester. It provides connectivity for businesses to local, national and international markets and is also the major strategic route from the Midlands to London, Thames Valley, Airports and the south coast ports. In addition it is a major tourist route to the Cotswolds, Cheltenham and Gloucester. Its importance to Gloucestershire's economy cannot be overstated.

With over 34,000 traffic movements daily, it is one of the most heavily congested roads in the South West and recognised nationally as a notorious accident black spot and cause of major delays as a consequence of high traffic levels, HGVs on uphill sections and incidents such as lorry engine and brake fires, all of which contribute to unreliable journey times.

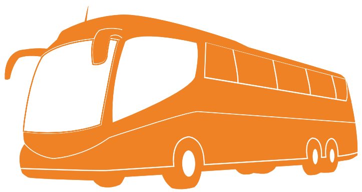
It is also the site of many major accidents and has an accident rate of twice that of the dualled section of the A417/A419. As a result it features on the national traffic reports almost daily.

The failure to dual the 'Missing Link' undermines the huge investment in the 45km dualled section and has created dangerous local rat runs. The road is managed, maintained and improved as part of the Strategic Road Network (SRN), by the Highways Agency (HA), on behalf of the Department for Transport (DfT), but the much needed permanent solution to this Missing Link currently does not feature in any DfT or HA plans.

55 . The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

A number of surveys of businesses[55+56] have been commissioned over the years providing evidence that:

- **The A417/A419 is an important transport corridor for 80% of respondents. Only the M5 North and South exceeds this in importance;**
- **This corridor has the worst average vehicle delay of all strategic routes in the South West and a higher delay than the national average;**
- **Freight operators and organisations identified this as the least reliable section of the Gloucestershire road network in terms of journey reliability and congestion, with attendant impact upon operating costs;**
- **Records show that major incidents occur on this stretch of road around six times a month.**
- **When problems occur then traffic, including lorries, diverts onto local, often unsuitable, roads to bypass the problem, with attendant environmental and safety problems;**
- **The A417/A436 Roundabout and its approach from Crickley Hill were identified as particularly dangerous, especially during adverse weather conditions;**
- **Over 68% of businesses said the 'Missing Link' was significant or very significant to the operation of their business. Over 70% of respondents said that the 'Missing Link' had a negative impact on the operation of their businesses.**
- **The most recent survey and interviews highlighted the A417 as the most critical individual element of the Strategic Road Network in the county.**
- **A web based campaign for resolution of the problems on the 'Missing Link' was launched in February 2014 and has already achieved nearly 4000 pledges of support.**



55 . (a) Delivering a Sustainable Transport Strategy (DaSTS) Stage 1 Study – South West Regional Assembly: June 2009;

56 . (b) Cheltenham and Gloucester Connectivity Study Phase 1 Report May 2010; (c) Connectivity Research in Gloucestershire-2013.

The proposed 'Brown Route' scheme provides a dual carriageway for the whole section of the 'Missing Link', from the Cowley roundabout to the Brockworth bypass, effectively removing both congestion and accident hotspots. The dual carriageway would be segregated from the local road network. At the time of publishing the 'Brown Route' scheme in 2003 the DfT quoted said 'No unacceptable environmental effects have been identified; it provides good value for money and is deliverable."

The 'Brown Route' scheme will:

- **Provide a grade-separated dual carriageway from Brockworth to Cowley;**
- **Reduce the likelihood of both collisions and congestion;**
- **Provide high value for money;**
- **Provide network resilience.**
- **Provide wider economic benefits.**

The proposal will deliver strategically significant economic benefits including:

- **Reduced business operation costs through reduced journey times and improved reliability;**
- **Increased connectivity to wider markets;**
- **Greater exposure to potential inwards investment opportunities to support local growth;**
- **The creation of construction jobs associated with delivering the 'Brown Route' solution.**

Joint meetings have taken place between GFirst LEP and Swindon and Wiltshire LEP (SWLEP) to improve connectivity between the two partnership areas.

We offer support to the measures outlined in SWLEP's Transport 2026 Vision and acknowledge SWLEP's support of the strong need for action to resolve the transport issues associated with the A417-'Missing Link'.

A full Business Case can be found in Appendix 4A.

4.2.1.2 Other Growth Enabling Transport (and related) Projects

Unlocking access to GREEN Skills Centre

In support of the GREEN proposal outlined in section 4.1.2 the locality is also subject to a series of significant commercial development proposals including employment expansion to the Stroudwater Industrial Estate and Sharpness Docks.

The locality will greatly benefit from the following road improvement schemes aimed at facilitating the successful delivery and sustained growth of the GREEN initiative at Berkeley and surrounding area. The three key proposals are:

- **A419 Stonehouse corridor improvements;**
- **A38 Berkeley Bridges;**
- **Improved access to Berkeley (A38 and B4066) scheme.**

These three schemes will ensure that the economic potential of this area of the county is safeguarded into the future.

M5 Junction 9 Transport Strategy

The M5 provides the division between Ashchurch and Tewkesbury and a significant proportion of trips between these centres involve crossing at Junction 9, with consequent delays during peak travel times.

The Highways Agency (HA) was awarded £1.7m during 2014/15 through the National Pinch-Point scheme to improve travel conditions on the A46 (east of junction 9) which will provide short term relief to congestion on the road network.

Any additional large scale release of development land (such as the MOD Ashchurch site) is likely to require significant additional capacity and sustainable transport interventions.

Growth proposals in the emerging Joint Core Strategy (Gloucester, Cheltenham and Tewkesbury) identify around 38ha of employment land, including 20ha of brownfield re-development at the MOD site, and 18ha at Ashchurch, south of the A46. Collectively, these are predicted to generate in the region of 3,300 net new jobs, which equates to an annual GVA contribution of nearly £74million.

Without a deliverable transport solution for Junction 9 significant development of the scale being promoted will be unachievable and the likely forecasted increase in travel demand could be unmanageable in terms of increase vehicle delay and unacceptable in terms of highways safety without improvements at the junction.

The types of schemes to be considered for the Strategy in order to maximise the role of existing passenger transport networks would include:

- **An upgrade of M5 Junction 9 (signals, widening or perhaps grade separation),**
- **Dualling of the A46 to Evesham;**
- **A new walking and cycling bridge across the M5;**
- **A range of soft transport measures to encourage behavioural change;**
- **An up-grade to Ashchurch railway station and the rail services available there;**
- **Other general public transport improvements.**

This would be in addition to the HA's pinchpoint scheme already proposed. This strategy development work will take place as soon as revenue funding can be identified.

The proposal is to work with the Highways Agency and the local authorities to agree a transport strategy for Junction 9 in the context of the local growth aspirations.

This proposal aligns itself with the Growth Zone by supporting the delivery of infrastructure improvements along the M5 corridor to support economic growth. The overriding aim is to attract businesses by enabling the delivery of prime employment land in excellent locations with great connectivity to the M5.

M5 Junction 10 All Movements

One of the primary aims of the LEP is to bring forward a significant employment and mixed use site within the vicinity of this junction. The upgrade of junction 10 will provide a four-way vehicle intersection enabling all vehicle movement on and off the M5. Once provided this will significantly increase the opportunity to develop land within the surrounding area.

The area immediately surrounding Junction 10 is not currently reaching its commercial potential for attracting investment due to the reduced access provided by the M5. At present, vehicles can only travel northbound towards Birmingham.

Vehicles requiring southbound access are required to drive into Cheltenham and access the M5 at Junction11. This unnecessary increase in vehicle demand impacts highway safety in residential areas and contributes to decreasing air quality within a designed Air Quality Management Area.[57]

The Joint Core Strategy (JCS) has identified 23ha of employment land in addition to 4,829 dwellings for a site in close proximity to M5 Junction 10 in North West Cheltenham. This allocation is constrained by the capacity of the existing junction. Improving this capacity has the potential for increasing the employment land potential to 150ha resulting in a total mixed use and employment allocation of 127ha.

Discussions with developers, commercial agents and major employers suggest that there is interest to develop the 150ha mixed use and employment site and the Local Authorities accept that mixed use and employment land is the most plausible and pragmatic use to bring the site forward. They have strongly indicated that they are unlikely to bring forward the site in the absence of a junction upgrade. They also confirmed that they see no other significant barriers to development, subject to the land being allocated through the local plan process.

This proposal strongly aligns with the Government's draft National Policy Statement (NPS)[58] and the DfT's business plan[59] for investing in the strategic road network to enable growth.

57 . Cheltenham Borough is a designed Air Quality Management Area.

58 . National Road and Rail Networks: draft national policy statement: Department of Transport December 2013. http://bit.ly/1dA6uQl

59 . Department for Transport business plan – Department for Transport June 2012: http://bit.ly/P8GEHC

A40 Regeneration Areas – Improving Connectivity and Resilience

A recent business survey[60] found that the A40 from the Forest of Dean causes several miles of bottlenecks each working day and noted that the route lacks transport resilience and is prone to the effects of flooding and other incidents on the network. This indicates evidence of potential market failure because of congestion due to the over-dependence of private car trips on the A40 corridor feeding the M5 Growth Zone.

As populations increase and the economy grows the need to encourage regeneration whilst alleviating traffic congestion is imperative and failure to address this will put a brake on economic growth and on the desirability of Gloucestershire as a place to live, work and invest in. There is an opportunity to regenerate parts of the county where there is latent demand for high quality jobs, skills and training through ensuring transport investments enable a dynamic and well-connected local economy.

Many of the schemes within this proposal will alleviate or offset traffic congestion and support economic regeneration. This will be achieved through improving traffic flows and addressing congestion bottlenecks. This will enable employers to access skilled workforces living in attractive parts of the county.

GFirst LEP supports Gloucestershire County Council's revenue bid to the Department for Transport's Local Sustainable Transport Fund. We particularly welcome the focus on workplace engagement and the elements of the project which link into our Growth Hub and Growth Zone.

In partnership with organisations such as the Highways Agency, the DfT, Network Rail, Stagecoach, the Homes and Communities Agency and the District Councils we will deliver the following proposals which are pre committed either as a "tail end major" or a pre-approved GLTB scheme:

- **Elmbridge Transport major scheme;**
- **A40 Bus Lane Benhall;**
- **A40 Corridor bus priority;**
- **A40 Over Roundabout.**

Therefore, addressing traffic congestion is fundamental to supporting regeneration through improved access to skills, jobs, goods and services.

60 . Cheltenham and Gloucester DaSTS Study (2009)

This proposal seeks funding for the following projects that are not pre committed:

Regeneration Schemes

In order to unlock their economic potential we support the regeneration of the following areas that look to the A40 connection to the M5 Growth Zone.

- **Cinderford Northern Quarter Link Road;**
- **Lydney Transport Strategy;**
- **Kings Quarter Bus Station, Gloucester.**

Congestion Pinchpoint Schemes

We support the following schemes which will address bottlenecks within the transport network, and, if unresolved, are predicted to worsen and put a brake on economic recovery:-

- **B4063 Staverton Bridge Junction;**
- **A38 St Barnabas Roundabout Scheme;**
- **Gloucester south west by-pass.**

A number of other schemes may receive a funding contribution through the GLTB - this will be determined in April 2014. Detailed funding applications setting out the benefits for the above schemes have been provided for the GLTB schemes in accordance with the DfT approved Assurance Framework and for Elmbridge as part of the Major Schemes programme entry in 2011.

Gloucestershire Local Transport Board (GLTB)

It is envisaged that all funding to GLTB will be allocated to projects ahead of implementation of the Single Local Growth Fund - this will be determined in April 2014.

Detailed funding applications setting out the benefits for the above schemes have been provided for the GLTB schemes in accordance with the DfT approved Assurance Framework and for Elmbridge as part of the Major Schemes programme entry in 2011.

Any future funding to be distributed for infrastructure spend from Single Local Growth Fund will be managed in line with Governance proposals within the SEP.

Our current thinking is that once the Single Local Growth Fund 'goes live' the good practices of GLTB will form an integral part of the broader role of Gloucestershire Investment Board.

Public Transport - Bus

In the UK 67% of public transport trips are made by bus; in Gloucestershire, the bus has an even greater market share.

Recent UK-wide research by *Greener Journeys*[61] identifies the following:

- **2.5 million bus commuters, with a further 1 million using the bus as back up, circa 12% of the working population;**
- **Over 50% of businesses surveyed considered bus transport had a role in recruitment and retention.**

Congestion is widely acknowledged to be a serious constraint on growth and estimated to cost at least £11bn per annum in urban areas alone, according to Government analysis.

Bus services in Gloucestershire already make a significant contribution to the reduction of economically damaging congestion – especially in the Gloucester and Cheltenham urban areas.

With proposed levels of development within the SEP, the bus lane will be the main alternative to an otherwise significant increase in road traffic levels and congestion.

GFirst LEP supports the public transport projects prioritised within the SEP and outlined earlier in this section.

61 . http://bit.ly/1rJulkn

Public Transport - Rail

Network Rail has consulted various stakeholders including local authorities and LEPs as part of the development of their Long Term Planning Process (LTPP) and considered a range of infrastructure options to improve capacity for the Cheltenham/Gloucester area. These include:-

- **An hourly through service from Cheltenham and Gloucester to London;**
- **Additional north-south west connections calling at Gloucester;**
- **A possible future through service to Oxford;**
- **An improved service to Worcester possibly connecting up with a new Birmingham to Swindon service with additional stops at Ashchurch.**

The key potential infrastructure upgrade from 2019 onwards will be electrification from Bristol to Birmingham, through the county, which will reduce journey times and increase capacity along the route and link up with other electrified lines.

GFirst LEP supports Network Rail's LTTP and recognises the benefits rail improvements can deliver for businesses in Gloucestershire. Renewal of the First Great Western franchise will arise in 2016 and GFirst LEP seeks early discussions on the scope of the franchise to secure pre-consultation commitment to the following:-

- **New timetables that will give the best return on the recent Swindon to Kemble line upgrade, including improved frequency of services to London;**
- **Investment in key station up-grades to meet additional capacity demands;**
- **Enhanced provision of car parking;**
- **New rolling stock.**

In addition to the above transport projects Gloucester City Council is investigating the delivery of employment site opportunities around:-

- **M5 Junction 11 at Elmbridge Court and land adjoining Gloucestershire Airport;**
- **M5 Junction 11a at Gloucester Business Park;**
- **M5 Junction 12 at Waterwells, Quedgeley East, and Kingsway.**

Development at these junctions will support sustainable employment growth for Gloucester's growing population and working age cohort and aligns with our Growth Zone strategy.

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Enablers for Growth: Transport

Table 13	Business Case (%)	Single Local Growth Fund								Other Sources of Funding						Benefits as a result:				
		£millions								Public (Millions)			Private (Millions)							
		2014-2021	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Details of Source	Amount	Committed	Details of Source	Amount	Committed	Millions		BCR	Houses	Notes
																GVA	Jobs			
A417 – The 'Missing Link'																				
1) A417 Loop	100	0.00								Dft/HA	255.00	0.00				300.00	50,000	BCR 4:1		Supports core strategies included in Core Strategies outputs
										GCC-revenue	0.50	0.50								
										GCC-revenue	4.00	0.00								
TOTAL MISSING LINK		0.00									259.50	0.50								
Unlocking access to GREEN Skills Centre																				
1) A419 corridor improvements		4.36		0.11	0.26	0.67	2.00	1.32	0.00											Supports Green initiative included in LEP stretch target
2) A38 Berkeley Bridges		1.99		1.99	0.00	0.00	0.00	0.00	0.00											
3) A38 B4006		1.15		0.05	0.05	0.05	0.20	0.80	0.00											
TOTAL GREEN		7.50		2.15	0.31	0.72	2.20	2.12	0.00							30.00	5,000			
M5 Junction 9 Transport Strategy																				
1) Transport Strategy		0.00								Highways Agency	20.00	0.00							2100	Supports J9 employment land included in Core Strategies outputs
										Revenue	1.50	0.00				74.00	3,300			
TOTAL J9		0.00									21.50	0.00								
M5 Junction 10 – all movements																				
1) Junction 10 full movements and mitigation package		0.00								Highways Agency	27.00	0.00							1100	Supportts J10 employment land included in LEP stretch target
2) Developer capital-park and ride		0.00								Revenue	1.00		Developer	5.00	0.00					
TOTAL J10		0.00									28.00	0.00		5.00	0.00	139.00	6,500			

Priority Code

Low Medium High

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Priority	Table 13 (continued)	Business Case (%)	Single Local Growth Fund								Other Sources of Funding						Benefits as a result:				
			£millions								Public (Millions)			Private (Millions)							
			2014-2021	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Details of Source	Amount	Committed	Details of Source	Amount	Committed	Millions		BCR	Houses	Notes
																	GVA	Jobs			
	A40 Regeneration Areas																				
	Committed schemes																				
High	1) Elmbridge-Dft programme entry awarded 2011 (Tail end Major Scheme funding)	100	14.10		2.00	7.00	5.10				GCC funding	2.40	2.40								
High	2) A40 Bus Lane Benhall-GLTB approved										GLTB major scheme funding	1.20	1.20	Stagecoach	0.07	0.07					
High	3) A40 Over Roundabout-GLTB approved										GLTB major scheme funding	2.23	2.23								
High	4) A40 Corridor BP-GLTB approved										GLTB major scheme funding	2.50	2.50								
High	5) Final GLTB approved scheme(s)										GLTB major scheme funding	3.87	3.87								
	TOTAL		14.10		2.00	7.00	5.10					12.20	12.20		0.07						
	Package 1																				
Medium	1) Cinderford Northern Quarter Link Road		3.80		3.80						HCA	4.30	4.30				na	1500		195	Supports JCS included in Core Strategies outputs
											FODDC	0.50	0.50								
Medium	2) Kings Quarter Bus Station		4.70		2.00	2.70															
Medium	3) Lydney Transport Strategy		1.00		0.10	0.10	0.80														
	TOTAL		9.50		5.90	2.80	0.80					4.80	4.80								
	Package 2																				
Medium	1) Gloucester south west by-pass		2.00					2.00													Supports JCS &FOD Core Strategy included in Core Strategies outputs
Medium	2) St Barnabas roundabout scheme		1.00						0.10	0.90											
Medium	3) B4063 Staverton Bridge Junction		1.60				0.10	0.10	0.40	1.00											
			4.60		0.00	0.00	0.10	2.10	0.50	1.90											
	TOTAL Regeneration		14.10		5.90	2.80	0.90	2.10	0.50	1.90		4.80					225.00	20,000			

Priority Code

Low Medium High

Table 14	Business Case (%)	Single Local Growth Fund								Other Sources of Funding						Benefits as a result: (See VFM statement)				
		£millions								Public (Millions)			Private (Millions)							
		2014-2021	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Details of Source	Amount	Committed	Details of Source	Amount	Committed	Millions		BCR	Houses	Notes
																GVA	Jobs			
TOTAL SEP BID		**35.70**		**10.05**	**10.11**	**6.72**	**4.30**	**2.62**	**1.90**		**326.00**			**5.07**						

For all Outputs and Calculations see Appendices 4A (A417), 4B (GREEN - Road Improvement Programme), 4C (M5 Junction 9 Transport Strategy) and 4D (M5 Junction 10 - all movements)

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Value for Money Statement: Transport 2015-2021

The total investment from all sources will provide the enabling infrastructure to support both the flagship initiatives and the core strategies.

Value for Money Statement: (2015-2021)

The total investment from all sources will provide the enabling infrastructure to support both the flagship initiatives and the core strategies.

4.2.2 Gloucestershire Airport

Last year Gloucestershire Airport was voted Best General Aviation Airport 2013 by the Aircraft Owners and Pilots Association (AOPA).

We recognise the potential growth opportunities that exist in relation to Gloucestershire Airport and the land around it, located in the very heart of our Growth Zone and in close proximity to the M5 motorway near both Cheltenham and Gloucester. The growth potential at this locality goes beyond airport related activities and includes a wide range of economic development opportunities.

Gloucestershire Airport's prominence as a business aviation centre for the county continues to grow; the airport now handles around 90,000 aircraft movements each year, many for business purposes.

Working with relevant transport, economic and development agencies, our aim is to optimise the contribution and benefit Gloucestershire Airport can make to the local communities and economy by:-

- **Supporting the development of proposals, including alternative governance models and access to investment funding, to ensure the airport remains the most successful in the UK.**
- **Identifying and highlighting opportunities to encourage ancillary activities and related development of land within and adjacent to the airport boundary.**

In their recent Interim Report, published in December 2013, the Airports Commission[62] indicated that 'Local Authorities should support the development of smaller local airports and, alongside consideration of their environmental impacts, also give due consideration to the positive benefits they can bring to the local and regional economy'.

The site on which Gloucestershire Airport is located is co-owned by Cheltenham Borough and Gloucester City Councils; Tewkesbury Borough Council is the relevant local planning authority.

The report also stated that 'Government policy should promote the benefits of smaller airports in the London and South East system for accommodating business and general aviation'.

We believe Gloucestershire Airport would benefit greatly from being the officially designated airport to accommodate business and general aviation from airports in the South West and Midlands.

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62 . http://bit.ly/1dTnRpl

4.2.3 Broadband & Mobile Phone Networks

Broadband

Work is already underway to deliver superfast internet capability in partnership with Herefordshire as part of the 'Fastershire' project[63].

Many deeply rural communities within Gloucestershire remain without sufficient broadband and mobile phone network provision and this represents a major barrier to enterprise and SME growth in these areas.

High speed broadband and mobile phone network coverage are increasingly vital for rural firms as more and more business is conducted via the internet and on the move. Commercial investment by both BT and Virgin Media has enabled the county's largest settlements to benefit from superfast services and the local Fastershire project will go some way to extend the opportunity of access more widely.

Our aim is to bring Next Generation Access broadband to around 90% of homes and businesses to the county, resulting in an estimated boost to the local economy of approximately £419m over 10 years. Beyond 2015, further action will be needed to provide effective broadband connections to the remaining 10% of Gloucestershire, especially to businesses in the most isolated locations.

Post 2015, the Government has allocated an extra £250m to support the roll-out and Gloucestershire and Herefordshire have recently made a case to the Government to be flexible in how this funding is spent, targeted at more localised business based-demand. This principle has also been identified within our EUSIF submission, to try and establish whether EU funds could also be used as match funding here.

63 . http://bit.ly/1gx3mUB

Mobile Phone Networks

Mobile phone connectivity has become an essential of modern life and crucially important to the business community so they can transact business on the move.

This £150m Government funded project[64], sponsored by the Department for Culture, Media and Sport, will provide coverage in 'Not Spot' areas[65]

Where relevant, the Fastershire Broadband team will aim to identify whether any resulting mobile infrastructure could be of use in extending the reach of the current NGA broadband programme in the county.

The National Radio Plan published by Government has also identified locations where shared base stations would provide coverage to 'not spots', eight of which are in Gloucestershire.

We recognise the importance of this project, the potential synergy with our Fastershire Broadband Infrastructure Project, and the opportunities that delivery of this project will bring to the rural based businesses of Gloucestershire.

64 . Broadband Delivery UK (BDUK) Mobile Infrastructure Project (MIP)

65 . The definition of a 'Not Spot' area is one where no effective coverage is provided by any of the mobile networks, usually because it is uneconomic

4.2.4 Planning (Collaboration)

The planning process has a key role to play in supporting the delivery of the SEP, particularly in relation to enabling sustainable housing and employment development and maintaining the attractiveness of Gloucestershire as a place in which to live, work, visit and invest.

There is a firm foundation of collaboration between the county's councils on planning and we are committed to strengthening that collaboration in order to support the growth ambitions set out in the SEP.

Key to the delivery of our ambitions for the growth corridor is the longstanding collaboration on the Gloucester, Cheltenham Tewkesbury Joint Core Strategy. Due to be submitted to Government in winter 2014 the strategy will provide a clear and consistent framework for future housing and employment growth across the county's main urban areas and their hinterland.

The work on the strategy is led by a member Steering Group comprising councillors from the three councils and supported by a Cross Boundary Programme Board of senior officers chaired by a chief executive.

The links between the JCS and the Stroud Core Strategy is important in relation to our growth zone, as is the overall planning framework for the county, embracing the Forest of Dean and Cotswold Councils. The relevance of the JCS is addressed in Stroud's formal duty to co-operate statement and the Gloucestershire councils have adopted an agreed approach to the duty through the County Planning Officers Group[66].

66 . This group brings together planning policy managers and key technical staff from the county's local authorities.

In addition we are committed to exploring the scope for aligning the timing of the reviews of the core strategies across Gloucestershire to provide for a more integrated approach. This would build on a growing number of collaborative planning initiatives including:

- **The creation of a Junction 10 Steering Group to develop the case for an all-movements junction;**
- **The joint commissioning of economic forecasting and analysis by the JCS team and the LEP;**
- **The Gloucestershire Strategic Flood Risk Assessment[67];**
- **The Gloucestershire Strategic Housing Market Assessment[68];**
- **Infrastructure Delivery Plans.**

This joint working is underpinned by three key pan-Gloucestershire Groups:

- **The County Strategic Planning Issues Group[69] is currently accountable to Leadership Gloucestershire[70], and has provided the main link between the SEP and the planning process. Other issues it has addressed include: the introduction of the Community Infrastructure Levy and opportunities and challenges for supporting strategic infrastructure across Gloucestershire;**
- **The County Planning Officers Group supports CSPIG and identifies ways of responding to the challenges involved in the local planning process. It is the main vehicle for jointly commissioning Gloucestershire-wide planning evidence.**
- **The County Development Management Managers. The meetings of this group of staff provide an opportunity to review progress on major, large scale development schemes and cross boundary proposals.**

67 . http://bit.ly/O3EF6A

68 . http://bit.ly/1hC5FSo

69 . This group brings together lead members, chief executives and senior officers from local authorities across the county.

70 . This group brings together the leaders of Gloucestershire councils with key partners.

4.2.5 Housing

Housing is critically important in securing economy growth. The construction sector is an important sector in its own right. And the supply, quality and price of housing have implications for the composition of the local workforce, the skills mix and the attractiveness of an area as a place in which to live, work and invest.

Private house building rates are expected to increase, with over 18,130 completions expected in the period 2013-18. 49,400 homes are planned to be built between 2013 and 2031 to help deliver the county's growth.

Gloucestershire's seven affordable housing providers spend £91 million in the Gloucestershire economy each year. Over five years (2014-19) their £85 million new build programme will add 1,000 homes; create 1,615 construction jobs; and 1,100 supply chain jobs. Councils will spend £13.5 million on private housing grants and loans over the period 2014-18. This will generate 415 jobs.

Local authority mortgage schemes worth £3.2 million are helping over 150 first time buyers.
In Gloucestershire there is evidence to suggest that high house prices and constraints on housing land supply will act as a constraint on growth. In the short term we are committed to the speedy delivery of the housing land allocated in the emerging planning framework. A number of the proposals in the SEP will facilitate the development of a number of major housing sites.

In the longer term even closer collaboration between planning authorities is key to addressing this issue. We are exploring the scope for aligning the timing of the revision of our core strategies and the Gloucestershire planning authorities have agreed to examine how best to rationalise their approaches to the identification of housing requirements across the county.
This housing will be delivered in accordance with the Core Strategies within the county and is fully supported by GFirst LEP.

4.2.6 Regeneration

The SEP focuses on action which we think is most likely to secure additional jobs, houses and economic growth. This is part of a wider programme of activity across the county to ensure that Gloucestershire is an attractive place in which to live, work visit and investment. Central to that wider programme are a number of major regeneration projects. This section summarises those projects and their contribution to economic growth in Gloucestershire.

In Gloucester, the Gloucester Heritage Urban Regeneration Company (GHURC) has co-ordinated more than £500m of investment over 6 years with a further £200m committed, or in the pipeline.

Working closely with private sector investors, Gloucester City Council is driving forward significant new and coordinated investment activity. Building on the successes of the past and working towards its strengths of having a young, growing population and entrepreneurial spirit, the City Council, working closely with GFirst LEP, will create a dynamic context for growth.

This will be achieved through a number of key projects including:

- **Kings Quarter:** Working with its private sector delivery partner, Stanhope, the City Council will deliver significant improvements to the central area of the city through the acquisition and removal of out-dated buildings and transport infrastructure, in particular the existing bus station. In its place will be constructed a state of the art public transport hub, linking with improvements proposed at Gloucester Railway station. This will enable the delivery of a £50million regeneration scheme providing in excess of 150,000ft² of new retail and leisure space that will underpin the complete offer of the SEP;
- **Blackfriars:** At a strategic location, between the Historic Docks, Cathedral and River Severn, this site provides an opportunity to consolidate predominantly public sector 'brown-field' landholdings to deliver a mixed use regeneration scheme that enhances and respects the historic fabric of the site. Blackfriars provides an opportunity to support existing and new businesses through increasing footfall and activity and by creating high quality office and residential space in the city centre.
- **Ministry of Justice site at Blackfriars:** A significant opportunity exists to deliver a major regeneration project within the centre of Gloucester. The majority of land in this area is in public sector ownership, allowing a scheme to be delivered without protracted problems of land assembly.

  The scheme would reverse the trend of the last few decades of residents, businesses and hotel accommodation moving out of the city centre.

  Working collaboratively we will deliver:

  - **New housing including affordable homes**
  - **New office space and courts**
  - **New 4 or 5 star hotel**
  - **New leisure opportunities including enhancements to public realm.**
- **Gloucester Docks and Quays:** the regeneration of these areas of Gloucester has been dramatic, as have their contribution towards the county's economy through both commerce and tourism. There are further opportunities available to build on this commercial success.

In the Forest of Dean, the education-led regeneration of a former coalmining area known as the 'Cinderford Northern Quarter' is underway. It tackles localised deprivation while delivering wider economic and social benefits.

A new college will be the anchor point for a programme that will inject more than £100m in public and private sector investment to develop a campus for 1,500 students. It will create at least 1000 jobs, 60 apprenticeships, 400 new homes and 50,000 sq m of commercial, industrial and educational floorspace. The project has a longstanding commitment of £14.5m from the HCA.

Cheltenham Borough Council's Regeneration Taskforce is currently engaged in bringing forward major capital projects at:

- **North Place/Portland Street, which will comprise a retail superstore and housing; Boots Corner, which is shared space and public realm improvements, Council offices relocation, a retail/hotel development;**
- **Coronation Square, involving the demolition of retail units and a retail led mixed use development;**
- **The significant Brewery Centre phase 2 - a retail, hotel, and residential development.**

In Stroud, the main priority is to develop a number of sites linked by the canal, at Brimscombe Port, Cheapside, Milliken and Ham Mill. Many of these sites have had problems, which have delayed their development, but all will have their value enhanced by the restoration of the canal.

In Tewkesbury, the Council has identified a number of key projects for delivery over the next 5-10 years. These include the Tewkesbury Town Centre masterplan, which provides a number of sites for future opportunities, and the redevelopment of the 170 acre site for housing and employment, which is subject to the MOD's closure proposals for Ashchurch being confirmed.

Cirencester Town centre remains the key regeneration priority for Cotswold District Council, with a focus on improving public realm and the potential for mixed use development opportunities, as well as a focus on further development of the man-made lake environment at the Cotswold Water Park. Most future growth will be in Cirencester and detailed studies have shown the best location is south of Chesterton, a sizable area of approximately 120 hectares for housing and employment use.

Each of these projects will act as a catalyst for regeneration and major investment in their wider locality. They offer significant potential to deliver economic growth, additional jobs and wider environmental and social benefits. This activity complements the growth opportunities identified in the SEP. It will also address some of the area's inherent economic weaknesses such as the shortage of good quality employment space, poorly configured retail floor space, and generally poor quality public realm in many of our town and shopping centres.

GLOUCESTERSHIRE
enablers
for growth

5. Local Authority Contribution

The seven Gloucestershire councils are committed to supporting the delivery of the programmes set out in the SEP and, where appropriate, to contributing to the delivery of those programmes and our wider growth ambitions for the county. The proposed statutory Gloucestershire Statutory Joint Committee (see section 5.5) will provide a mechanism for co-ordinating this contribution.

This section sets out the scope of that potential contribution in relation to:

- **Financial support;**
- **The use of councils and other public sector land and assets;**
- **Improvements to the planning process;**
- **Support for the delivery of the connections element of the SEP.**

5.1 Financial Support

There are a number of possible mechanisms through which councils can support the proposals in the SEP which we are keen to explore in the context of our local growth deal negotiations.

Gloucestershire is one of only 18 places to have established a business rate pool. Under this arrangement, where the pool generates funds in excess of the pre-pool position, the surplus would be used in three ways:

- **To fund a reserve to manage the risks that being in a pool creates;**
- **20% of the remainder will be paid into a strategic economic development fund;**
- **The remaining 80% would be split 20/80 between the county and district councils.**

Potential sources of capital funding are:

- **The Gloucestershire Infrastructure Investment Fund – a revolving loan fund intended to bring forward stalled, but commercially viable developments;**
- **£3.3m of the Major Transport Funding which is currently unallocated;**
- **Capital receipts from the disposal of council owned land or assets (and the possibility of borrowing against such receipts);**
- **Community Infrastructure Levy/s106 agreements.**

We are also exploring the contribution that could be made by the New Homes Bonus, particularly in relation to NHB income generated from large developments including the possibility of using this as an income stream to repay the cost of borrowing to fund upfront capital investments.

One approach that we are particularly keen to explore during the local growth deal negotiations is the creation of a number of local funding packages relating to particular investments promoted in the SEP such as in relation to M5 Junction 10. This could involve the relevant councils using a combination of business rate surplus, NHB and capital receipts to match a potential single local growth fund injection.

We have a number of 'asks' of Government which would assist us in pursuing this approach:

- **An adjustment to the way in which the business rate levy is applied in Gloucestershire, which currently penalises us in comparison with other areas. We understand that 75% of pools have a 0% levy: if this was applied to us it would generate an additional £3.7m which could be used to support the implementation of the SEP.**
- **Greater certainty about the future longevity of the business rate and NHB regimes which would enable us to plan and potentially borrow with more certainty.**

5.2 Land, assets and co-location

We are committed to making the best use of public assets in Gloucestershire to ensure the best possible use of public money and to support the delivery of the SEP through action on particular sites and the potential use of capital receipts.

We have established a pan public sector forum – the One Gloucestershire Group – to work towards rationalising the combined operational estate. In addition the County Council has embarked on three strands of related work:

- **A programme of Area Based Reviews, to identify opportunities to make best use of the existing portfolio of properties, and to identify those properties which may be surplus to requirements to generate capital receipts.**
- **A review of current interface/customer services and delivery of high street services. How and where best do we deliver future services?**
- **A review of opportunities for shared use of buildings and opportunities with County Strategic Partners.**

Once the County Council and other local public sector partners have completed the programme of local reviews, we intend to begin the next phase of work, bringing together Government Departments and Estates such as the HCA to look at a much wider public sector asset management strategy for the county that could support the aspirations in the SEP.

Initial discussions have taken place with the HCA on future Government and public sector sites, future disposals and the wider development opportunities such as the release and disposal of the MOD site at Ashchurch.

The County Council is also committed to working with the LEP and other partners to explore how public sector assets can be used for development opportunities and to support future growth. It is, for example, exploring the potential for the release of land near M5 Junction 10 for mixed use development.

Additionally, as part of the 'Getting our Own House in Order', outlined in its Corporate Plan, Gloucestershire County Council continues to review its operations and seek opportunities to share services with other public sector partners. It is also aiming to use technology to reduce the back office support needed by managers, as well as assisting customers to access services more easily on-line and be more responsive to local needs.

There are already many examples of where the County Council and the local District/Borough Councils have collaborated in joint arrangements on shared service provision (e.g. HR, payroll, legal services, refuse, depots, a shared Chief Executive role across two boundaries). The County Council and the Police have recently co-located with Tewkesbury Borough Council at their HQ.

Through the Area Review process, other opportunities for further rationalisation and co-location of service delivery have been identified in some of the principal centres/towns. These opportunities will be discussed with service commissioners imminently, upon completion of the full area reviews.

The public sector would welcome the opportunity to work with BIS and DCLG to explore the potential of utilising additional Government funding (including the capital receipts flexibility fund for local authorities that is part of the Transformation Challenge Award in 2015/16 and 2016/17) to implement some of the emerging ideas/proposals on public sector co-location/service delivery that will support regeneration and growth aspirations aligned to the SEP.

5.3 Improvements to the planning process

The effective operation of the planning process is a key issue for many businesses, particularly those seeking to expand or locate in the area. As part of our action to enable the growth envisaged in this SEP, we are commissioning a programme of work to improve the effectiveness and consistency of the planning system in Gloucestershire.

This work would build on the good practice that exists across the county and draw upon the engagement that currently takes place between senior council planners and the LEP Construction and Infrastructure Group.

The work would also benefit from the input of the LEP facilitated Planning Forum, a practitioners' group that meets regularly to encourage engagement between the public and private sectors to review current and future development opportunities and effective planning practice.

We are proposing a three part process:

- **The establishment of a shared understanding of how the planning system should operate in order to meet the expectations of business and other key stakeholders and interests;**
- **A peer review process of the type advocated by the Planning Advisory Service to identify ways in which planning procedures in the councils in Gloucestershire can be developed in order to better enable sustainable economic growth and meet the legitimate expectations of business;**
- **A review of the outcome of that process and the development of a joint work programme with the LEP to implement any agreed changes.**

Provision would be made during the process for lessons from other areas to also be taken into account. We are aiming to complete this work by July 2014.

5.4 Supporting delivery

The Gloucestershire Councils have agreed to fund a joint post to co-ordinate the local authority contribution to the SEP. In addition, we are also exploring the possibility of establishing a project development board to co-ordinate the planning, funding and delivery of each of the major developments proposed in the growth zone proposals.

5.5 Governance

'The GFirst LEP Board acts as the 'voice' of businesses in the county and a link between private, public and voluntary sectors.'

Dr. Diane Savory OBE
Chair, GFirst LEP

GFirst LEP Board

The GFirst LEP Board's role is to set the strategy for economic growth within the SEP and the EU Structural and Investment Fund Strategy (EUSIF Strategy). It is a forum for discussion and decision-making on strategic growth priorities, with a particular focus on acting as the 'voice' of businesses in the county and a link between private, public and voluntary sectors.

The GFirst LEP Board will proactively monitor performance against the SEP and EUSIF Strategy and will work closely with the Gloucestershire Joint Committee to facilitate collective and collaborative decision making on SEP and EUSIF Strategy delivery issues that require agreement from local authorities.

5. Local Authority Contribution

Gloucestershire Joint Committee

The local councils in Gloucestershire have taken the opportunity presented by the strategic economic plan to strengthen collective governance across the county. They have agreed to establish a statutory Gloucestershire Joint Committee under the provisions of the Local Government Acts 1972 and 2000.

The Joint Committee is due to meet formally for the first time in June, which should enable it to sign off the local growth deal with Government. The membership of the committee will comprise the Leaders of the councils (or another executive member) and the Chair of the LEP and one other LEP Board member (as non-voting members).

Why a Joint Committee?

Leadership Gloucestershire (which brings together the council leaders and other partners) considered two other options before agreeing to establish a joint committee. They were:

- **A strengthened version of our current voluntary arrangements;**
- **The establishment of an economic prosperity board or combined authority under the provisions of the Localism Act 2011.**

On the basis of independent advice, we rejected the first option on the grounds that it would not provide for effective collective decision-making or robust local accountability for the use of the local growth fund and other funding streams.

We seriously considered the Combined Authority model, but on the basis of the advice we received we opted for a joint committee for three reasons: proportionality, flexibility and speed.

Given the size of our LEP area and the structure of local Government – one county and six districts – we concluded that the process involved in establishing a combined authority was out of proportion with the governance task involved.

We are keen to have new arrangements in place as soon as possible to engage in the local growth deal negotiations and the timescales involved in establishing a joint committee would not have allowed this. Finally we were keen that the focus of governance arrangements and potentially the remit should be able to evolve over time. We concluded that this was more easily achieved with a joint committee than a combined authority or economic prosperity board.

Role of the Joint Committee

The terms of reference for the Joint Committee reflect this flexible approach. We are proposing that each of the seven councils should "empower the Joint Committee to discharge on their behalf the power to do anything it considers likely to achieve the promotion or improvement of the economic wellbeing of the area of Gloucestershire together with such additional functions as the respective constituent councils may determine from time to time." The terms of reference also establish a specific remit in relation to agreeing and monitoring the strategic economic plan, the implementation plan, the EU SIF strategy, and reviewing the LEP board's activities and strengthening the relationship with the board.

Support for and scrutiny of the Joint Committee

The Joint Committee will be advised by a chief executive's group and will have a close relationship with our LEP Board. We have also:

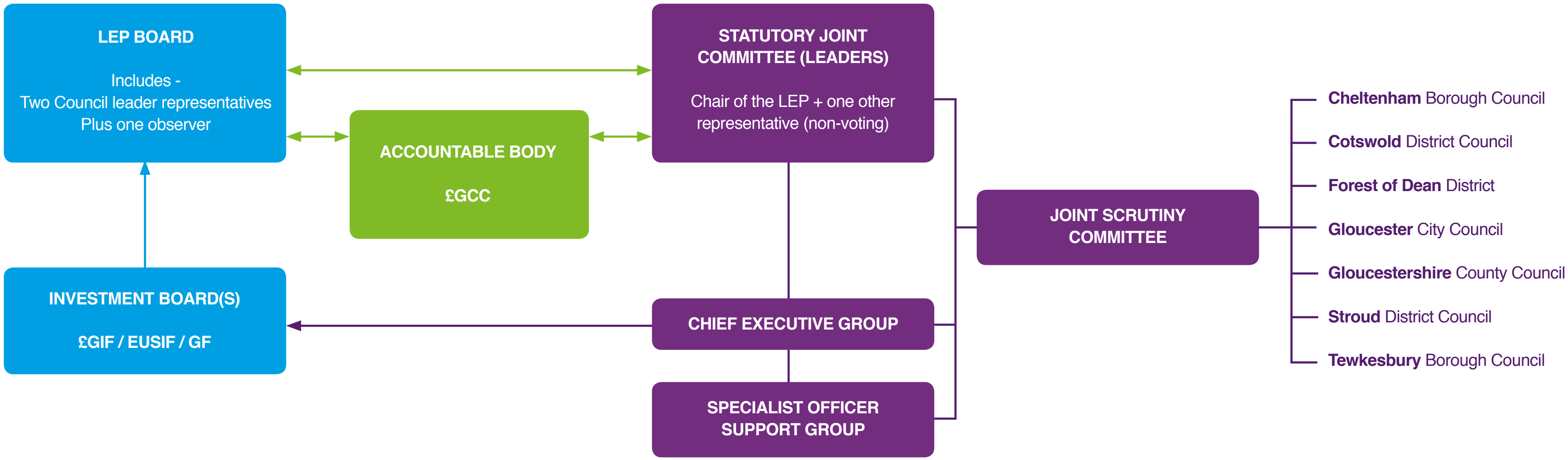
- **Established a senior multi-disciplinary officer support group to both advise the joint committee and co-ordinate the local authority contribution to the delivery of the SEP;**
- **Agreed to create a new post, funded by the councils, to support and co-ordinate the local authority contribution, working with the support group.**

Finally, we have agreed to establish a Gloucestershire Economic Growth Overview and Scrutiny Committee to evaluate and monitor the work of the Joint Committee, including the delivery of the SEP. Based on our successful Health and Care Overview and Scrutiny Committee, this will ensure that a robust scrutiny process is in place.

More information can be found in Appendix 5

5. Local Authority Contribution

Governance Arrangements



Gloucestershire Investment Board

This Board will comprise representation from the public, private, education and voluntary sectors and will consider and approve or reject all investment opportunities, and be responsible for:-

- **Commissioning approved investments;**
- **Endorsement of investment decisions;**
- **Where appropriate, de-commissioning approved investments which fail to deliver.**

Reporting and reviewing processes

The LEP Board and the Statutory Joint Committee will undertake quarterly reviews of delivery against SEP priorities and highlight improvements/actions required.

The GFirst LEP team and relevant local authority officers will implement individual projects with relevant organisations (contractors, partner organisations, and regulatory bodies) to bring about performance improvements/actions required.

The SEP will be reviewed annually and this will incorporate a review of: priorities and projects supported/funded by Government departments and where they are in the 'pipeline' of delivery; contracted delivery activities; emergent growth priorities in the county and neighbouring LEP areas.

Gloucestershire Joint Committee

Principles

The SEP and EU SIF Strategy contain the intervention priorities that GFirst LEP and partner organisations have identified to strengthen the Gloucestershire economy and local opportunities for growth.

From discussion with Government colleagues, our assumption is that once our SEP has been submitted and reviewed, it will provide the basis for funding negotiations for activity commencing in 2015-16 and that Government will work with GFirst LEP to:

- **Confirm which growth interventions from the SEP merit further development and investigation in order to decide whether or not Government will support them**
- **Agree and sign a 'Growth Deal' with GFirst LEP and Gloucestershire County Council (as the accountable body)**
- **Empower Local Growth Teams and central department/Government agency colleagues to work with GFirst LEP and prepare specific projects within the Growth Deal so that they can be commissioned and delivered in a timely and effective manner**
- **Provide resources to GFirst LEP to deliver appropriate and transparent commissioning, procurement, contract management, financial management and monitoring and reporting services in order to maximise the effectiveness and value for money of the agreed Growth Deal.**

GFirst LEP will endeavour to work to the UK Government's eight principles for good commissioning and the guidelines provided in the National Audit Office's 'Successful Commissioning' toolkit[71].

71. http://bit.ly/1pgK6gn

The eight principles are:

- **Understanding the needs of users**
- **Consulting potential providers**
- **Putting service outcomes at the heart of the process**
- **Mapping the range of potential providers**
- **Considering investing in capacity building**
- **Ensuring contracting processes are transparent and fair**
- **Ensuring long-term contracts and risk-sharing**
- **Seeking feedback from service users, communities and providers.**

Where working with local authorities, Government departments, agencies and other opt-in partners, these principles will be upheld and will underpin the specific commissioning arrangements agreed between the partners and GFirst LEP.

Methods of delivery

We expect to adopt several different delivery methods in order to bring strategic level activities to fruition and successful completion. These will vary depending on the nature of the growth deal agreed with Government and will include:

Open Calls for projects and Competitive Bidding Rounds

Organisations will be invited to submit applications/proposals to deliver projects that fit with the strategic level activities, outputs and results required. GFirst LEP and partner organisations will provide support for these organisations to prepare and submit their applications/proposals. Open bidding rounds will be followed by rigorous selection processes managed by GFirst LEP and partner organisations in conjunction with the relevant Government department and other agencies involved.

Direct Commissioning of Specific Activities

Organisations will be commissioned to deliver certain activities that fit with the strategic level activities.

Commissioning with Opt-in Partner Organisations

We will work closely with the identified opt-in partner organisations to integrate local and national programmes more closely, access match-funding at a national level, minimise risk, and make efficient use of the opt-in partners' commissioning and procurement systems and processes. Examples include the Skills Funding Agency and UKTI.

Procurement

Depending on the specific activities/outcomes to be procured, GFirst LEP staff will work with the relevant Government departments and with local partners to determine the most appropriate method/s and systems for procurement. This will be based on maximising the effectiveness and efficiency of procurement, for example, working with local authorities with established procurement processes and systems to reduce costs.

6.1 Sequencing and Prioritisation

We have prioritised our proposals based upon the following factors:

- **Growth potential**
- **Value for money**
- **Deliverability**
- **Delivery costs**
- **Delivery timescales**

Prioritisation has been carried out by the GFirst LEP Board and managers with input from stakeholders including the key business sector groups and local authorities, as well as wider stakeholders.

This process has identified the projects within Growth Hub and GREEN as our priorities.

Our highest growth priority within our Growth Zone is at Junction 10 of the M5 and our highest transport priority is the so-called "Missing Link"[72] on the A417.

There is a specific business cases for each of the key components of the SEP contained within the Appendices to this report and within each of these there is a section headed 'delivery' which gives more details of the timescales and sequencing of the activities needed to bring each component to completion.

72. The section of single carriageway at the Gloucester/Cheltenham end of the A417/A419 route linking the M4 near Swindon to the M5.

Early Delivery Projects for 2015

Subject to timely availability of Single Local Growth Fund funding, the following projects will be delivered during the period 2015 to 2016:

GLOUCESTERSHIRE growth hub

- The Growth Hub and 'spokes' (satellite offices) will be in place, and delivering all the programmes;
- The early outputs will be 1829 jobs, 703 apprenticeships, 804 qualifications, and an uplift in GVA of £22.653m.

More information can be found in Section 4.1.1

GREEN

- Following the design and refurbishment work, the students will be on site for September 2015;
- The Construction and Engineering Course currently run at South Gloucestershire and Stroud College will transfer to Berkeley, bringing the site alive and creating a vibrant and exciting environment from the outset. All other programmes will commence during 2015/2016;
- The early outputs will be 2520 jobs, 200 apprenticeships, 167 qualifications, and an uplift in GVA of £9.98m.

More information can be found in Section 4.1.2

GLOUCESTERSHIRE growth zone

GLOUCESTERSHIRE enablers for growth

- Schemes already in progress or agreed will continue during 2015/2016;
- Key initiatives to support our flagship projects will proceed, in particular those supporting the GREEN Skills Centre and our Regeneration projects, resulting in a speedy return on investment.

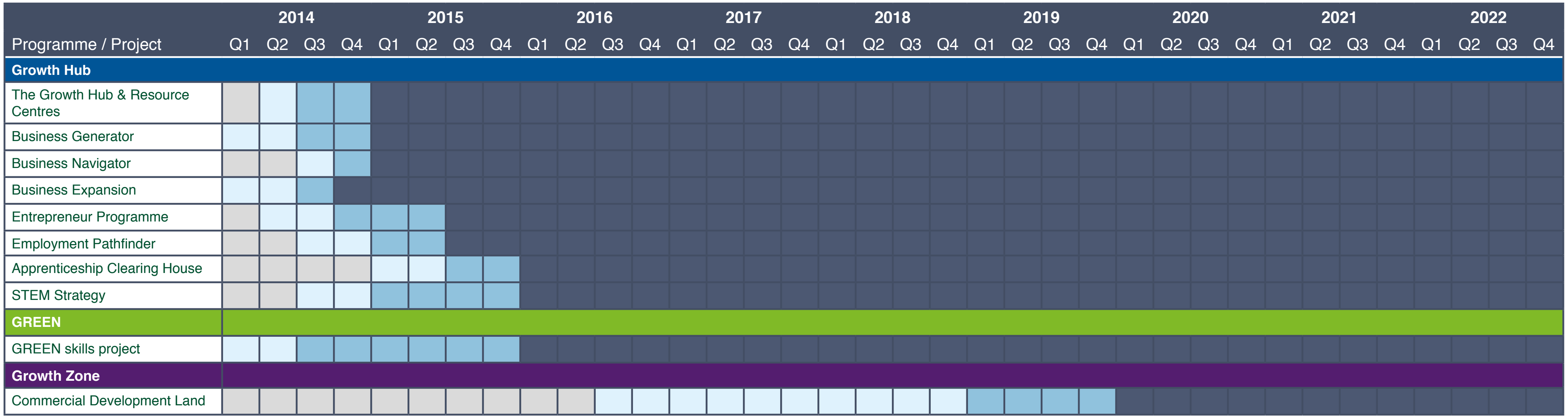
More information can be found in Section 4.1.3

More information can be found in Section 4.2

6.2 Delivery Timelines

Project Delivery Table

Table 15



Colour Code

Designing & Refining · Planning & Develmopment · Launch · Full Implementation

Transport Delivery Table

Table 15

	2014				2015				2016				2017				2018				2019				2020				2021				2022			
Programme / Project	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
A417 - The ‘Missing Link’																																				
A417 - The’Missing Link’																																				
GREEN																																				
1) A419 corridor improvements																																				
2) A38 Berkeley Bridges																																				
3) A38 B4006																																				
M5 Junction 9																																				
1) Transport Strategy																																				
M5 Junction 10																																				
1) Junction 10 full movements and mitigation package																																				
2) Developer capital-park and ride																																				
Regeneration																																				
1) Elmbridge-Dft programme entry awarded 2011																																				
2) A40 Bus Lane Benhall-GLTB approved																																				
3) A40 Over Roundabout-GLTB approved																																				
4) A40 Corridor BP-GLTB approved																																				
5) Final GLTB approved scheme(s)																																				
1) Cinderford Northern Quarter Link Road																																				
2) Kings Quarter Bus Station																																				
3) Lydney Transport Strategy																																				
1) Gloucester south west by-pass																																				
2) St Barnabas roundabout scheme																																				
3) B4063 Staverton Bridge Junction																																				

Colour Code

Scheme & Development   Planning & Approvals   Delivery/Construction

6.3 Risk

GFirst LEP recognises the need for effective risk management systems and procedures to ensure the early identification, assessment and mitigation of risks that may emerge during implementation of our plans.

During the period of development of our SEP for Gloucestershire we have managed risk by taking a pragmatic approach involving creation and maintenance of a Risk Register based upon the following model:-

Identify Risk	Impact Score	Probability Score	Risk Priority Score	Gross Risk Level	Mitigating Action	Net Risk Level
Brief description of risk identified	Where 1 = Low 4 = High	Where 1= Unlikely 4 = Likely	Impact x Probability	1 to 4: Low 5 to 7: Medium 8 and over: High	Brief description of action	Assessment of Net Risk Level following action

Using this model we have been able to assess and mitigate risks as they have been identified, and monitor those categorised as Medium or High in order to reduce them at a Net Risk Level.

High Gross Risks identified to date are as described in the following extract from the Risk Register which includes details of mitigating action taken and consequent reduction at a Net Risk level.

Identify Risk	Impact Score	Probability Score	Risk Priority Score	Gross Risk Level	Mitigating Action	Net Score	Net Risk Level
Insufficient or no private sector investment	4	2	8	High	Clear Vision for Gloucestershire developed in consultation with the business community; GFirst LEP driven by high profile business leaders within Gloucestershire; Regular engagement with all key business sectors in the county; Early identification of potential investors;	6	Medium
Insufficient or no business community engagement	4	2	8	High	Clear Vision for Gloucestershire developed in consultation with the business community; GFirst LEP driven by high profile business leaders within Gloucestershire; Regular engagement with all key business sectors in the county; Early identification of potential investors;	4	Low
Insufficient or no local authority engagement	4	3	12	High	Clear Vision for Gloucestershire developed in consultation with Local Authorities' Leaders and Chief Executives; Strong relationship management built upon a pragmatic and consultative approach; Local Authority representation on GFirst LEP Board, Project Steering Group, Task & Finish Groups; Formation of joint-working groups such as Gloucestershire Infrastructure Investment Board incorporating representation from Local Authorities, GFirst LEP, and the business community.	6	Medium
SEP Funding is below the level required for delivery of the full Flagship proposal	3	3	9	High	Design each flagship in a modular structure in order to be scalable.	6	Medium

Assurance Framework

We recognise that as we move into the Delivery stage of projects the effective management of risk will be crucially important and we have been guided by the H.M. Treasury paper entitled Assurance Frameworks[73] in developing our plans to date.

Current procedures are being reviewed as part of the development of an effective, pragmatic and proportionate Assurance Framework based around the monitoring and evaluation of all key projects and tailored to our local needs.

At this early stage it is difficult to be too prescriptive but we anticipate that each of our three flagship projects will have its own 'local' project plan which will include monitoring and evaluation processes and procedures taking as a base point the target measures already contained within each flagship project. For GREEN and Growth Zone these are likely to include the following:-

Topic	Target	Key Measures	Review Frequency	Review Body
Jobs Apprenticeships Housing Qualifications	Published in SEP	Performance against Targets	Quarterly	Appropriate Project Board plus others to be agreed but likely to include representation from some or all of the following dependent upon topic:- • GFirst LEP Board • Appropriate Local Authority

We will develop monitoring and evaluation procedures appropriate (and proportionate) to each project and outlining key inputs; activities; outputs and outcomes. The precise measures for each project have yet to be determined but our current thinking is illustrated in those detailed within the Business Cases in the Appendices.

We will agree with the Managing Authority the delivery processes, models and procurement routes to be adopted. These will ensure transparency of decision-making, elimination of conflicts of interest, management of risks and that there is an independent appraisal process.

73. http://bit.ly/1hC67QC

6. Delivery Arrangements

We anticipate operating a Programme-wide Assurance Framework comprising three levels:-

1. Project Level
The Project Manager will be responsible for identifying and mitigating risks by implementing appropriate controls; utilising the Risk Register model described earlier and reporting to a Project Steering Group or equivalent.

2. Project Steering Group (or equivalent) Level
The Project Steering Group will regularly review the Risk Register, ensuring appropriate rigour and challenge in order to satisfy themselves that there is a sufficient and proportionate level of Assurance oversight.

3. Programme Board Level
Reporting to the Board will be based around the use of:

- **A standardised reporting system and structure;**
- **A standardised suite of Key Performance Indicators with RAG status flags to highlight areas of under-performance.**

The Board will delegate responsibility for regular review of Risk at individual Project Level but will be responsible for collective overview of all Projects to satisfy themselves of the effective management of risk at both project and programme level.

The Board will be responsible for ensuring the identification and effective management and control of cross project inter-dependencies.

Resourcing

Further details including roles and responsibilities; frequency of reporting; resourcing requirements (and funding) will be agreed with appropriate partners ahead of implementation in 2015.

7. Engagement

In the past few years we have committed significant resources to leading a major business and community wide engagement programme with the strategic aim of ensuring that our future plans meet the needs of the people of Gloucestershire.

From GFirst LEP Board level, and throughout our structures, we have engaged and consulted extensiveley with partner organisations in the private, public, education, voluntary and community sectors. These partner organisations have contributed significantly to our plan and have built upon a stated desire by all parties to work collaboratively towards an economic vision for the county.

This has involved direct and regular face to face discussions with in excess of 200 businesses across the county and a further 50 or so voluntary organisations, plus many colleagues in the local authority and education sectors.

Key local authority stakeholder partners in Gloucestershire are:

- **Gloucestershire County Council**
- **Cheltenham Borough Council**
- **Cotswold District Council**
- **Forest of Dean District Council**
- **Gloucester City Council**
- **Stroud District Council**
- **Tewkesbury Borough Council**

Gloucester City Council
Transforming Your City

Forest of Dean District Council

CHELTENHAM BOROUGH COUNCIL

Tewkesbury Borough Council

Gloucestershire COUNTY COUNCIL

STROUD DISTRICT COUNCIL
www.stroud.gov.uk

The Chair and Chief Executive of GFirst LEP meet regularly with the county's six Members of Parliament:-

- **Geoffrey Clifton-Brown, MP for Cotswold**
- **Neil Carmichael, MP for Stroud**
- **Richard Graham, MP for Gloucester**
- **Martin Horwood, MP for Cheltenham**
- **Mark Harper, MP for Forest of Dean**
- **Laurence Robertson, MP for Tewkesbury.**

We have also consulted with Julie Girling, MEP for the South West of England. During the process of developing this Strategic Economic Plan there has also been regular engagement with many Government agencies including:

- **Homes and Communities Agency**
- **Highways Agency**
- **Skills Funding Agency.**

7. Engagement

Engagement with many organisations has been through our eleven Business Sector Groups representing 75% of employment and 80% of the Gloucestershire economy.

Business Sector Group		
Advanced Engineering and Manufacturing	Banking	Business and Professional
Construction and Infrastructure	Creative Industries	Energy
ICT	Land Based	Retail
Tourism	Transport and Logistics	

In addition, the quarterly meetings with our Business Membership Group comprising the business organisations referred to below and representing around 16,000 businesses across the county, has enabled us to hear feedback from and disseminate information to their members on a regular basis.

Business Member Group		
Confederation of British Industry	Institute of Directors	Federation of Small Businesses
National Farmers Union	EEF – The Manufacturers Organisation	Vale Business Forum
Cirencester Chamber of Commerce	Cheltenham Chamber of Commerce	Gloucester Chamber of Commerce

Association of Gloucestershire Chambers & Business Groups

GFirst LEP has also been involved in the formation of the Association of Gloucestershire Chambers & Business Groups to allow businesses to speak with one voice on significant business related issues. This newly formed group will formally launch in March 2014 and will encourage businesses of all sizes to join their local Chamber of Commerce or Business Organisation in supporting the work of the new Association. The aims of the Association are:-

- **Promotion of Gloucestershire as a place to live, work and visit;**
- **Provision of a centre of support and advice for local chambers and business groups;**
- **Promotion of good practice through the adoption of the Gloucestershire Chambers Code;**
- **Provision of support and 'weight' to both local and countywide issues for members;**
- **Support the case for SMEs at both county and national level;**
- **Support new businesses locating to Gloucestershire;**
- **Work with GFirst LEP in representing businesses;**
- **Business networking through shared events and social functions.**

This new group will provide GFirst LEP with additional opportunities to work closely with, and represent the views of the business community.

The LEP Board comprises cross-sector representation including the County Council, a representative of district councils; a representative of Higher Education and a representative of the Further Education Colleges; the voluntary and community sector; and a majority from a cross-section of the private sector.

The Project Steering Group has included representation from the County Council; District Councils; University of Gloucestershire; and the Local Nature Partnership.

Cross cutting focus groups have been held across the county, with representation from a wide variety of business sectors and sizes.

7. Engagement

Task & Finish Groups were formed by GFirst LEP to develop our plan and set our priorities. In addition to engagement with the organisations referred to earlier, we also consulted with:-

Rural and Environmental representatives including the Local Nature Partnership	Opt-in partners	Country Landowners Association
Civil Society	Skills Funding Agency	Sector Skills Council
Equalities organisations	Jobcentre Plus	TUC & Trade Unions

All of the above is supported further by:-

- An inter-active website with quarterly surveys to the business community of the county;
- LinkedIn business discussion groups, Twitter chats and feeds, and an active presence on Facebook, all used by us to seek views and comment from the business community;
- Around 400 Gloucestershire Ambassadors committed to promoting the county and utilised by us as sources of knowledge, information and opinion on business matters.

A list of the businesses and other organisations with whom we regularly engage is attached as **Appendix 6: Business Engagement - List of Businesses**

8. Acknowledgements

In addition to the strong support from our local authority partners, GFirst LEP has also been supported by literally hundreds of business people across the county who have given freely of their time to express their views, provided feedback and helped shape our plans for Gloucestershire.

In particular we'd like to thank the members of our Sector, Business Advisory, and Business Membership Groups for their work throughout the lifetime of development of this plan – and in anticipation of their continued support. Thanks also go to our Gloucestershire Ambassadors for the terrific work they regularly undertake on behalf of GFirst LEP and the county.

We are eternally grateful to each and every one of them and take this opportunity to record our thanks.

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