DORSET LOCAL ENTERPRISE PARTNERSHIP BOARD MEETING

28 JANUARY 2025 FROM 1.30 PM TO 4.00 PM

BOURNEMOUTH UNIVERSITY, BOARD ROOM, 5TH FLOOR, POOLE HOUSE, FERN BARROW, POOLE BH12 5BB

AGENDA

Time	Page No	Item	Subject/Title	Presenter
1.30		1.	Apologies and declarations of interest	Cecilia Bufton
1.35		2.	Chair Update (verbal)	Cecilia Bufton
		3.	**Policy**	
1.45	1	3.1	Transition of LEP Functions Update and Next Steps	Vinita nawathe
2.05	31	3.2	Pan-Dorset Framework for Growth	Vinta Nawathe
2.25	86	3.3	Support for Non Transferred Activity	Vinita Nawathe
		4.	**CIC Business**	
2.55	90	4.1	Business Update	Rebecca Davies
3.05	93	4.2	Skills Update	Rebecca Davies
		5.	**For Noting**	
3.15		5.1	Talbot Innovation Quarter - presentation	Sarah Horden
		6.	**Minutes from the Last Meeting**	
3.45	96		Approve Minutes and actions from November Board Meeting and matters arising	Cecilia Bufton
		7.	**Any Other Business**	
3.50				

Note: Date of Next Meeting – 27 March at 10.00 am

The papers for agenda Item 3.1 are not included as they are Commercially Sensitive

DORSET LEP BOARD MEETING COVER SHEET

Meeting Date	28 January 2025	**Item Number**	3.2
Security Level:	**Confidential ☐**	**Commercially Sensitive ☐**	**Unclassified ☐**
Paper Title	Final draft Framework for Growth		
Recommendation	To approve the final draft		
Papers are provided for:	**Decision ☐**	**Discussion ☐**	**Information ☒**

1. **PURPOSE**
   This paper presents the final draft of the Pan-Dorset Framework for Growth following online consultation and other feedback.

2. **SUMMARY/BACKGROUND**

   Starting with an evidence base refresh at the end of 23/24, Dorset LEP pre-empted a request from DBT for all areas to refresh and build on the work previously done by LEPs. A condition of 2024/25 LEP functions core funding, which the LEP is delivering on behalf of the councils, was to publish an up-to-date strategic economic document which should be available on the website of the accountable body.

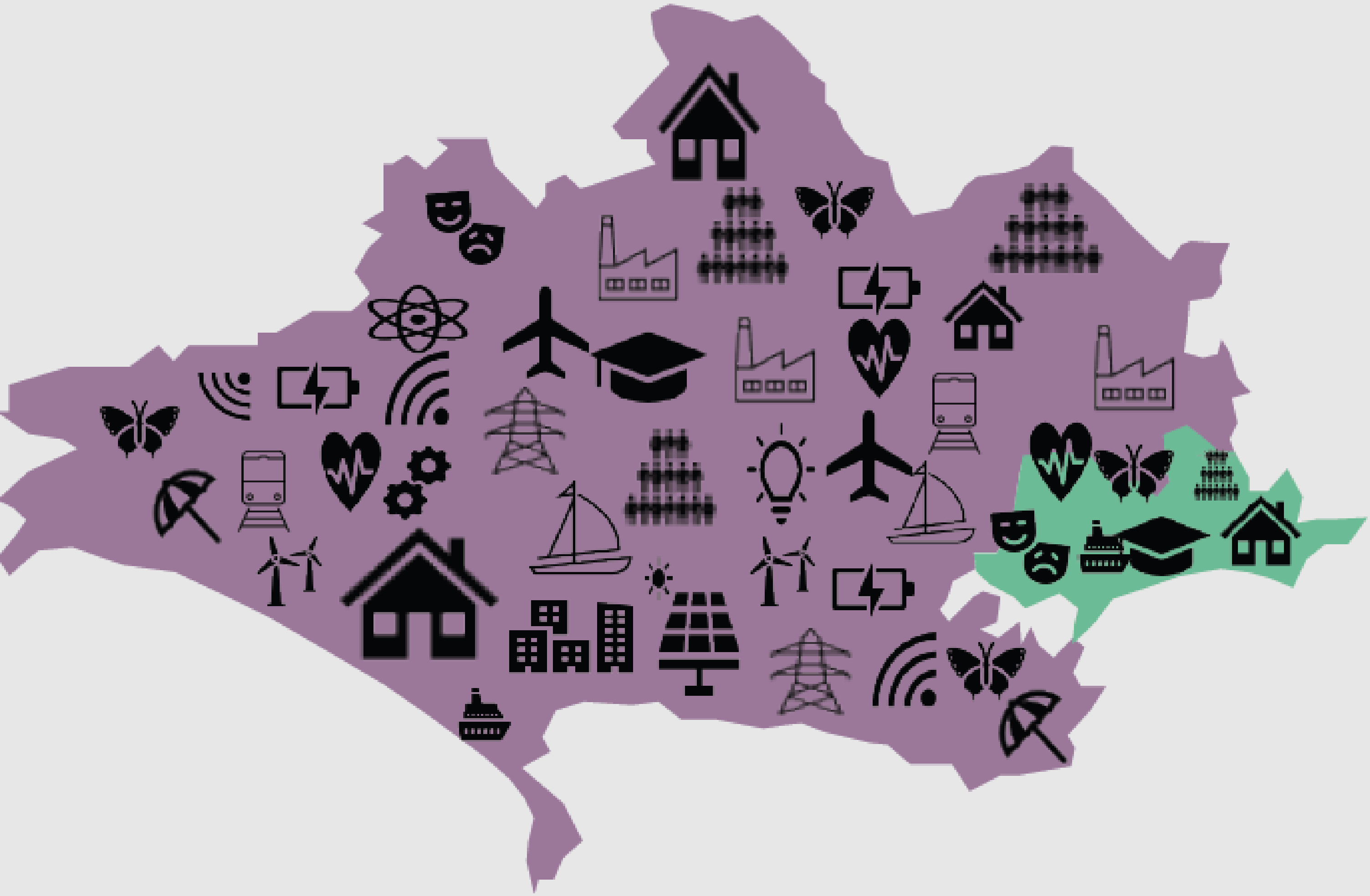
   This document which began with one to one consultations with the LEP board that was in place has developed over the year with input from a wide range of stakeholders who have provided resources, commented on drafts, suggested case studies and taken part in workshops. A consultation draft was on the LEP website and signposted on social media. BCP Council's leader chief exec and officers from across departments have engaged throughout.

   As non-devolved areas move towards strategic authority areas, an understanding of the opportunities and challenges in the wider geography will become paramount in order to inform prioritisation of what ultimately is hoped to be an integrated settlement over many years, but in the first instance will be by devolved competence. Prioritisation across the area will be expected to be evidence based. Strategic economic documents are also being prepared by the Swindon and Wiltshire Local Growth team and Somerset Council's economy team under the oversight of their newly recruited business board.

   This is the final version of a comprehensive piece of work on behalf of the Local Authorities. Subject to approval of the board, the intention is to publish this as the final version on the LEP website and to hand it over to the Local Authorities to inform their forthcoming discussions and plans.

3. **RECOMMENDATION**

   The board is recommended to approve the final version of this document.



A Framework for Economic Growth for the Pan Dorset Area - Executive Summary

Produced by Dorset LEP on behalf of Dorset Council and Bournemouith Christchurch and Pool Council

Introduction

This framework for growth sets out a plan to stimulate growth and improve prospects for people living in the Pan Dorset area. This covers the Bournemouth Christchurch and Poole Council area and Dorset Council area which reflects the need to make policy on a scale that reflects people's working, commuting and social patterns. However, we also recognise the need to work at a wider regional, national and international level on some issues. The plan represents the collective voice and aspirations of partners across the area and delivering it will require a partnership approach.

Where are we now?

The Pan Dorset area occupies a **prime location** on the South Coast with a unique blend of urban, rural and coastal opportunities. With an output of over **£21.9bn** and over **33,000 businesses** it benefits from a microcosm of international corporations, scale-ups and SMEs.

We have considerable **untapped energy resources** and the opportunity to develop a **nationally significant clean energy cluster** centred around Portland. Our unique geology means we have potential to:

- lead decarbonisation in the South of England and Wales through **Carbon, Capture and Storage** in the English Channel
- expand and accelerate the UK's hydrogen economy through development of the **UK's largest hydrogen storage site** to ensure energy security

Similarly, the identification of **offshore wind sites** in the Channel, as well as the wider Celtic Sea presents opportunities for our ports to develop **manufacturing, integration and assembly capabilities** (such as the Channel Gateway project). At the same time, our long-standing relationship with nuclear energy at Winfrith provides prospects for **small scale modular nuclear reactors (SMRs)**.

These nationally significant infrastructure projects will support the **national clean energy mission** and create thousands of well-paid job opportunities across the Pan Dorset area.

We also benefit from several growth driving sectors, where we have a clear comparative advantage and can compete in international markets. These include:

- **advanced manufacturing** (with a particular focus on marine/maritime, aerospace, defence and security)
- **clean energy industries** (capitalising on our unique natural assets)
- **financial services** (including Fintech)
- **digital and creative**
- **health and life sciences**

But equally, we are increasingly seeing growth at the **intersections between our sectors** and from businesses utilising **key enabling technologies** such as big data, internet of things, robotics etc.

Our growth driving sectors are **underpinned by our everyday economy** which provides a range of local services that are essential to the effective functioning of our economy and account for over 50% of employment. Improving productivity in these sectors is essential to improving the pay and prospects of people in our area, particularly women.

Businesses in the area can also benefit from the expertise available within our **three universities**, which produce almost **7,500 graduates each year**, but graduate retention is low. Similarly, our colleges and other education providers play a vital role in meeting the skills needs of our economy.

Our **town centres, district centres and local centres** form an intrinsic part of our community life and play a vital role in attracting people to the area. However, like many towns across the UK, our high streets have faced a range of challenges in recent years. A concerted effort by a range of partners as well as funding for towns has enabled the green shoots of recovery.

Our area is also recognised for its **biodiversity and landscape character**, with 52% of the landscape designated as a National Landscape. Our culture, towns, coast and countryside support a visitor economy which attracts almost 24 million visitors a year who spend over £1.6bn in the local economy. Likewise, our farms make a vital contribution to UK **food security** and the area has an emerging reputation for the development of **agri-tech** and **aquaculture.** As such, our agricultural sector also provides an opportunity for a proactive response to climate change and improved food security and a new generation of agri-tech could diversify and strengthen our agricultural roots.

Despite our range of opportunities, we must also recognise and address the challenges that are holding back our economy.

Our evidence base shows that between 1998 and 2022, economic output increased by only 29% in real terms and that of the 38 enterprise areas in England, **only the Black Country and Cumbria grew more slowly.** This low level of growth is due to a combination of:

- **lower than average productivity** which is £4.63/hour less than the UK average and growing more slowly than other areas
- **a plateauing working age population** which is ageing 20 years ahead of the national trend.

Our labour market is under considerable strain. Businesses are struggling to recruit, and our ageing workforce is expected to exacerbate this issue. But despite our tight labour market, there are **approximately 25,500 workless people in the area who would like to work**. Long-term **sickness and early retirement** are now the most significant reasons for economic inactivity and we have a **higher proportion of people working part-time,** which may also be constraining growth.

Despite the presence of three universities, the area has a **lower proportion of people with Level 4 or higher qualifications.** This matters, because higher skills levels are a key driver of growth. **High house prices relative to incomes** are constraining the labour market and affecting productivity by limiting the ability of workers to move. There are many factors which affect house prices, but **land constraints** are an important factor here.

Productivity is also affected by a range of **transport challenges** including north/south connectivity, congestion hotspots, poor rail connections and large rural areas which lack public transport and walking/cycling options. Likewise **digital connectivity** is a particular challenge in the Dorset Council area, due to its rural nature.

Finally, both Dorset Council and BCP Council have **declared climate and ecological emergencies** and have set out ambitions for the area to be carbon neutral by 2050 or earlier. Both Councils are working together and with partners to prepare a **local nature recovery strategy** for the area.

Our opportunity map

Two colleges: Bournemouth and Poole, and Weymouth and Kingston Maurward

3 universities with 7,500 graduates each year

14 Blue flag beaches

52% of the land area is designated as a **national landscape**

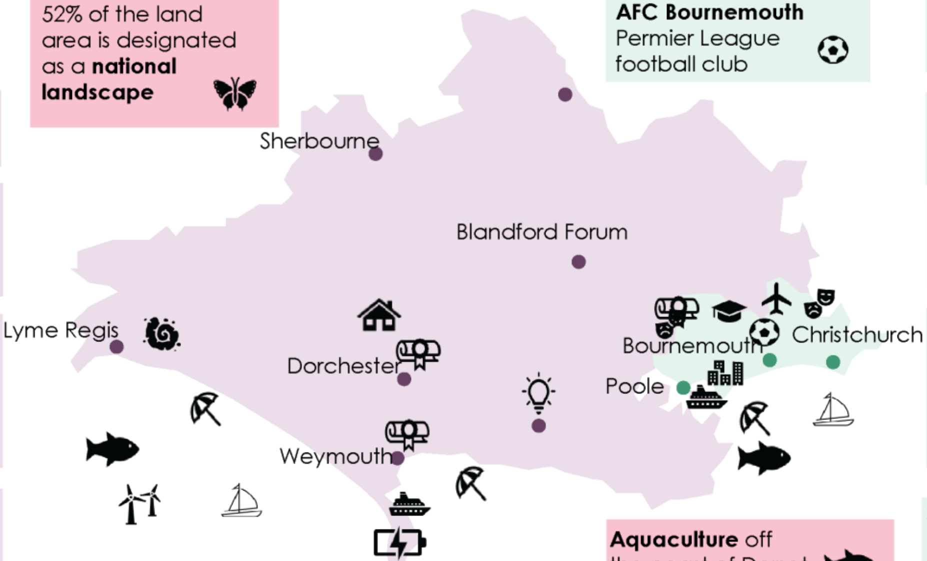
AFC Bournemouth Permier League football club

National **Sailing Academy** Weymouth

Onshore **renewable energy** across the area

Jurassic Coast UNESCO World Heritage Site 95miles of coast representing 185m years of history

£19.5m Levelling-Up funding to support **waterside regeneration in Weymouth**



Dorset Innovation Park - An advanced engineering cluster of excellence with strengths in marine, defence and energy and hoe to **Battlelab** - a state of the art defence, innovation and collaboration space. Potential for **small modular nuclear reactors**

Portland Port - Sheltered deep water port, perfectly positioned serve as a hub for the energy cluster and support offshore wind manufacturing and assessmbly through the **Channel Gateway project**

Offshore Wind opportunities off the Devon and Dorset Coast

Carbon, Capture and Storage sites in the English Channel

Hydrogen Storage in salt caverns in South Dorset

Aquaculture off the coast of Dorset and Poole

Port of Poole - with a new deepwater facility and masterplan, the Port has ambitions to become the UK's No. 1 marine leisure destination as well as a leading green port

Growing **cruise** destination

£19.9m Levelling up funding to be invested in the BCP seafront to support the **seafront strategy**

Regeneration of **Poole town Centre** as a sustainable health and vibrant place

£22m **Town Deal** to create a 'Better Boscombe'

Bournemouth International Centre - investment in the BIC so that it stands amongst the very best event venues in the world

Smart City – the UK's first open innovation system using full 5G and data platform

Bournemouth International Airport and Aviation Business Park - Opportunity to create the UK's newest cargo hub to serve London and the South East

Centre of excellence in Aerospace Maintenance, Repair and Overhaul

Lansdowne Central Business District - providing office space and homes

Holes Bay - a 16ha former power station for 830 new homes and employment land

Wessex Fields - 7.1ha strategic employment site linked to the Royal Bournemouth Hospital for a med-tech science park

Talbot village Innovation Quarter – 4.7ha linked to BU and AUB for health, innovation and incubation space

5 national portfolio organisations and wealth of cultural assets, including Bournemouth Symphony Orchestra

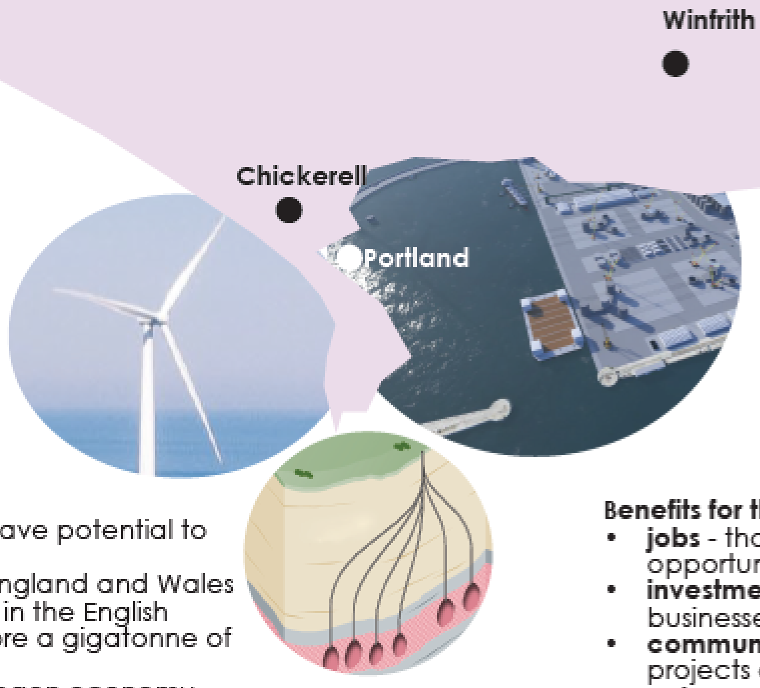
Shared **cultural ambitions** to nurture and retain creative talent, promote tourism and support a year round high quality inclusive arts, heritage and cultural offer

Dorset's Clean Energy Supercluster

Small Modular Nuclear Reactors (SMRs)
As an existing nuclear licenced site, **Winfrith** has the potential to host **Small Modular Reactors** which could power our digital and defence growth sectors, as well as millions of homes and provide baseload generation for more than 60 years.

Offshore Wind Opportunities South of Portland
Subject to future leasing rounds by The Crown Estate, there is significant potential to develop floating and fixed based offshore wind projects in the English Channel off the Devon and Dorset coasts.

For example, the c.2GW **Portwind Offshore Wind Farm** currently being planned by Portwind, has the potential to power over 3 million households annually and if linked to battery storage and hydrogen production, could contribute to energy security in the South West.



Channel Gateway
Is a proposal to devellop a new renewable energy port facility at Portland Port to service offshore wind projects in the Celtic Sea, English Channel and across Europe.

The new port will be the only large-scale deep water offshore wind port on the South Coast. It therefore offers a unique location for offshore wind suppliers or developers to develop manufacturing, integration or assembly facilities.

Unique Geological features
Dorset's unique geology means that we have potential to both:
- lead decarbonisation in the South of England and Wales through **Carbon, Capture and Storage** in the English Channel where there is potential to store a gigatonne of carbon dioxide and
- expand and accelerate the UK's hydrogen economy through the development of the **UK's largest hydrogen storage site.**

Dorset is the only place in the south of England with the right geological conditions to store hydrogen deep underground. UKEn is working on a £1bn project to utilise salt caverns in South Dorset to provide up to 17% of the UK's forecast **hydrogen storage** needs by 2050. The storage will provide **security of supply** to hydrogen clusters in the south of England and Wales, buffering demand/supply spikes and ensuring pipeline stability. The project will allow **green hydrogen** to be produced from excess clean renewable power, allowing it to be stored for future use.

Benefits for the pan Dorset area
- **jobs** - thousands of well paid, good quality jobs and training opportunities
- **investment** - attracting investment and supply chain businesses
- **community benefits** - interms of investments in community projects as well as lower energy bills
- **net zero** - faster progress towards net zero

Benefits for the UK
- **energy security** - maintaining a secure and affordable energy supply
- **climate protection** - protecting future generations from the cost of climate breakdown
- **new industries** - creating new industries and export opportunities
- **job creation** - supporting job creation across the UK
- **accelerate net zero and industrial decarbonisation**

Where we want to be?

By 2035, the pan Dorset economy will be one of the best places in the world in which to live, work, invest and play.

Brimming with optimism and fuelled by dynamic, productive businesses it will be an exemplar of a modern economy in an urban, coastal and rural landscape.

Our quality of life, exciting job opportunities and culture will attract and retain young people and families. At the same time, our integrated health system will ensure everyone who wants to work is able to do so.

Finally, as one of the most biodiverse places in England, we will be an exemplar of a sustainable economy, effectively balancing the needs of today with those of tomorrow, capitalising on our world-class natural resources and supporting nature recovery.

How will we get there?

Our approach to growth is broad based and recognises that whilst we have many opportunities to stimulate growth, we also have challenges that we need to address to create the right conditions for long term, sustainable growth. Our approach therefore recognises:

1. The urgent need **to address skills shortages**. This means taking immediate action to unlock the potential of people already living here by improving skills, health and access to opportunities.

2. The need (in the medium to long term) to **retain and attract young people** to live and work in the area to counteract our ageing demographic. This means providing a combination of:
    a. vibrant, connected places where people want to live
    b. affordable homes
    c. rewarding job opportunities.

3. The opportunity to **expand our growth driving sectors** at the frontier of our economy, which have the potential to create well-paid rewarding jobs, boost economic output and compete on the international stage. But, at the same time, we must also recognise that if we want to improve our productivity and wages, we must also **improve the productivity of businesses in the foundation or everyday economy** which accounts for over 50% of employment in the area.

4. The need to shape and inform nationally significant energy projects to transform the economy and maximise their benefits for communities and minimise their impacts

5. That to operate effectively, our economy needs **functional transport** and **digital infrastructure**, **an energy grid** that has capacity for new connections and **places for people to work**.

6. That our **natural capital supports our economy**, providing essential eco-system services as well as making the area an attractive place for people to visit and live. Our plans for growth must not erode this asset but look to enhance our natural environment for future generations.

These imperatives form the basis of the six themes and strategic objectives that run through this framework and are illustrated in our strategic objectives overleaf:

Area of Outstanding Natural Business

Cutting Edge Industries

Growth Driving Sectors

Stimulate, promote and support our high value clusters by:

- Establishing the area as a destination for international investment
- Stimulating inward investment and exporting
- Strengthening R&D, science and innovation investment
- Promoting strong links between businesses, research assets and supply chains
- Attracting and retaining graduates and technical skills

Growth and Opportunities

Everyday businesses

Improve the productivity, resilience and sustainability of our everyday businesses by:

- Improving technology adoption, innovation and agile thinking
- Improving access to finance
- Supporting start-ups and scale-ups
- Improving energy security and climate adaption

Empowered people

Empower all our residents to access employment and better opportunities throughout our economy by:

- Improving education and skills
- Preparing the workforce for the Energy Supercluster
- Enabling access to opportunity
- Tackling health related barriers to work and underlying causes of ill-health

Essential Foundations

Working Places

Provide the infrastructure to support growth by:

- Improving transport and digital connectivity
- Improving energy supply, security and grid capacity
- Increasing the availability of employment sites
- Developing construction skills

Vibrant Places

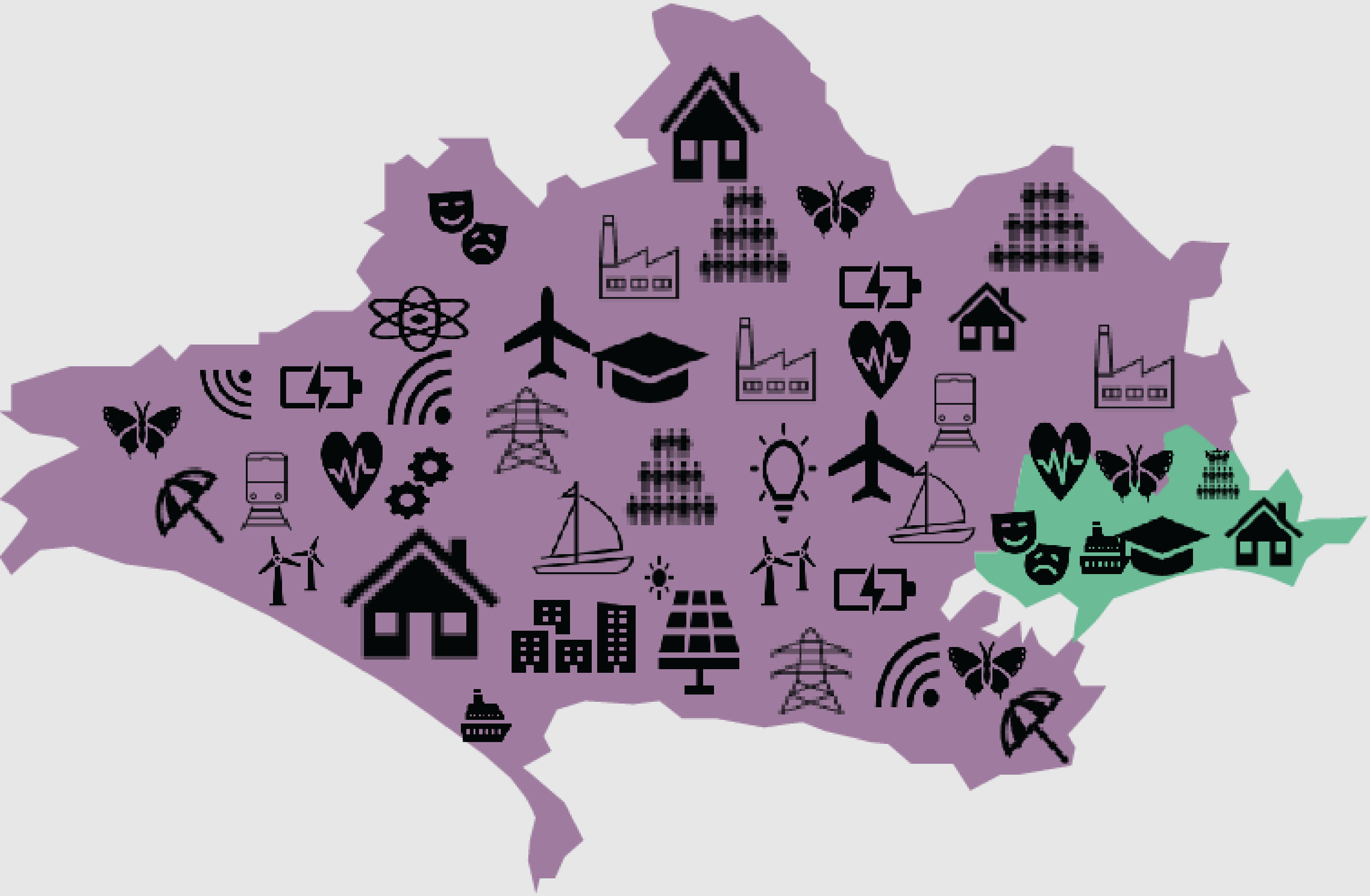
Champion the creation of vibrant places where people and businesses want to be by:

- Increasing the supply of homes and improving energy efficiency
- Investing in town centres
- Supporting culture
- Tackling deprivation and supporting communities

Natural Places

Maximise the potential of our natural resources by:

- Facilitating the development of the Dorset Clean Energy Supercluster and other clean energy opportunities
- Encouraging a one health approach
- Improving food security
- Providing green infrastructure to support health and well-being
- Support opportunities for integrated nature recovery and nature-based solutions



A Framework for Economic Growth for the Pan Dorset Area -

Produced by Dorset LEP on behalf of Dorset Council and Bournemouth Christchurch and Pool Council

February 2025

DORSET
Local Enterprise Partnership

Dorset Council

BCP Council

Introduction

Why are we producing a new economic framework now?

We have not undertaken a comprehensive review of Dorset's economic evidence base and priorities since the Local Industrial Strategy was published in 2019. A lot has changed since then, so a review and refresh is timely and aligns with government asks for updated economic strategies in 2024.

Purpose

The purpose of this document is:

- to set out a shared sense of direction for the Pan-Dorset area, so that businesses, partners and stakeholders in the area can get behind it and take co-ordinated action
- to communicate our collective ambitions to investors internationally and establish the pan Dorset area as a destination for investment to stimulate economic transformation and drive growth
- to identify ways that we can work with partners in other geographic areas to further joint objectives (e.g. the Great South West, Central South and Western Gateway and beyond)
- to identify investment priorities for the area which will help us to inform and shape major projects and lay the groundwork devolution arrangements and future funding bids.

Area covered

The area covered by this plan is the pan-Dorset functional economic market area, which includes both the Bournemouth Christchurch and Poole (BCP) Council area and Dorset Council (DC) area. This geography reflects the need to make policy on a scale which reflects people's working, commuting and social patterns – people often cross administrative borders every day as they go to work, shop and access services.

These two authorities became unitary authorities in April 2019 and have since worked together on a range of joint strategic planning processes including:

- a joint local transport plan
- an employment land review
- minerals and waste plans
- the joint strategic needs assessment (health)
- local nature recovery strategy
- local housing needs assessment.

Alongside this, our record of joint working also includes the Dorset Integrated Care Partnership – 'Our Dorset'. 'Our Dorset' is a partnership between the NHS, councils, public services and voluntary and community partners working together and is one of the most advanced integrated care systems in the UK.

However, we also recognise the need to work with partners beyond our immediate boundaries in order to:

- engage with a global marketplace and attract clean growth sectors
- harness the power of the private sector to accelerate economic restructuring into future facing sectors to create new opportunities for communities
- take advantage of wider opportunities (e.g. promoting opportunities which span an entire region such as the Great South West or Central South)
- tackle issues which require a co-ordinated response (e.g. north-south transport links).

Therefore, this strategy draws on evidence from across the region and highlights relevant opportunities for working at a regional scale.

Collective voice

Whilst the strategy has been drafted by Dorset LEP on behalf of the Local Authorities, it represents the collective voice and ambition of the whole area. 'We' therefore refers to this collective voice, rather than the LEP or one single organisation. We recognise that achieving our ambitions will require collaboration and partnership working at many levels. Some of our aspirations will require new levers to enable us to deliver and where this is the case, we will work with Government, the private sector and our neighbours to develop the tools we need to achieve our vision.

Methodology

The process has involved:

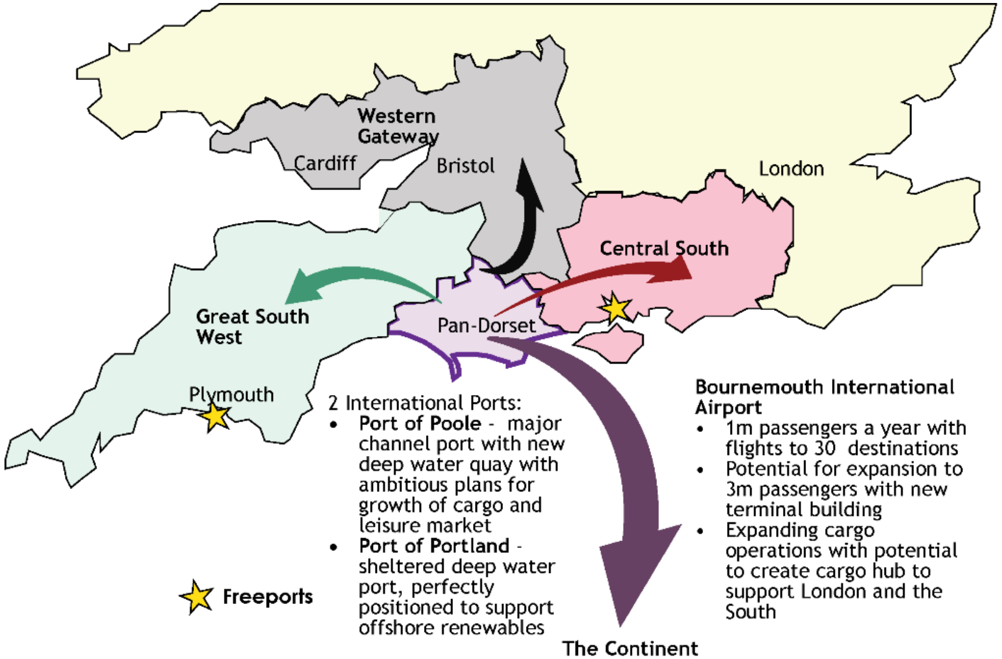
- conducting a full review of the economic data and trends affecting our area, this is provided in Appendix One
- conducting a review of existing strategies and plans across the area including
    - the local industrial strategy and previous LEP strategies and plans
    - draft local plans and corporate plans published by BCP and DC
    - economic plans and strategies published by BCP and DC
    - topic related strategies and plans covering housing, green infrastructure, skills, high streets, transport, digital, culture, energy and the environment across the area
- developing draft documents for engagement and discussion with LEP board members and partners
- facilitating a consultation workshop at the Dorset Ambassadors event on the 17th of September 2024 with 54 attendees representing businesses, education, public sector and wider stakeholders
- publishing a consultation draft on the 4th of October, with comments closing on the 18th of November
- responding to comments from the public consultation.

The pan-Dorset economy today

Our strengths and opportunities

A prime location

The pan-Dorset area occupies a **prime location** for growth at the crossroads between wider economic partnership areas such as the 'Great South West', 'Western Gateway' and 'Central South' regions.[1] Furthermore, our growing ports and airport provide important passenger and freight services to the continent and beyond.



A unique blend of urban, coastal and rural opportunities

The area benefits from a unique blend of urban, coastal and rural opportunities. BCP, as the **largest conurbation on the South Coast,** with **three universities** and **a premier league football club**, offers a vibrant urban and coastal way of life and potential springboard for growth. This is complemented by a wide range of opportunities in the DC area, including nationally significant **low carbon energy projects,** which pave the way for clean growth. Likewise, our outstanding natural environment across the pan Dorset area provides the foundation for our whole economy.

A microcosm of international corporations, scale-ups and SMEs

With an output of over **£21.9bn[2], over 33,000 businesses**[3] and a population of almost **800,000**[4], the area is an economic force with tremendous opportunities. We are home to an exciting microcosm of well-known international corporations, innovative scale-ups and a multitude of Small and Medium sized Enterprises (SMEs). This landscape provides a rich array of opportunities for our people.

Case Study – JP Morgan Chase

Renowned global financial services firm J.P. Morgan has maintained a significant presence on the South Coast for 38 years. Its Bournemouth office serves as a hub for essential functions, including core business operations, technology, and operational processing, employing a workforce exceeding 5,000 individuals. As a vital component of the company's global network, this location facilitates operations spanning over 90 markets across 40 countries.

[1] Pan-regional partnerships co-ordinate collaboration between local authorities and government to develop economic and infrastructure strategies such as the Northern Powerhouse

[2] Source: ONS, Regional Gross Value Added (balanced) by industry: City and Regions
[3] Source: ONS, UK Business Counts, 2023
[4] Census, 2021

Growth driving sectors where we have a clear comparative advantage

The pan-Dorset area has a number of growth driving sectors where we have a clear comparative advantage. These are sectors where we can compete in global markets and which offer our residents better paid opportunities. These include:

- **advanced engineering and manufacturing** (with a particular focus on **marine/maritime**, **aerospace**, **defence and security**)
- **clean energy industries** (capitalising on our unique natural assets)
- **financial services (including Fintech)**.

In addition, our rapidly growing **digital and creative** sector benefits from our rich cultural heritage, our investment in smart technologies and the international reputations of our universities in these fields. It therefore represents a key growth opportunity for the future.

Similarly, our integrated care system, ageing population and plethora of health science facilities within our hospitals, universities and colleges provides further opportunities for growth in the **health science** field and presents an opportunity for us to be a **test bed for how to manage ageing in our society.**

We are however, increasingly seeing growth at the intersections between sectors – for instance, where creative and digital meets defence, as the end stage case study illustrates. More information about each of these opportunities can be found in section 3.

Underpinned by our 'everyday economy'

Our everyday or foundation economy provides a range of local services such as health, education, leisure and public services, that are essential to the effective functioning of our economy and account for over 50% of employment. However, pay, productivity and job security are often lower than average in these sectors.

Case Study – End State

End State is a Dorset-based video production company specialising in creating content for Defence companies supplying equipment to the Ministry of Defence (MoD) and Dorset boasts an array of hidden gems perfect for shooting End State's content.

Their primary headquarters is situated at the Dorset Innovation Park, strategically chosen for its proximity to the Defence BattleLab. This location fosters collaboration between Defence companies, the Military and Government entities, providing crucial input from SMEs.

Development and adoption of Key Enabling Tech (KET)

The Great South West Integrated Economic Review found a total of 601 businesses were either developing or adopting KETs in the pan Dorset area (368 in BCP and 233 in Dorset). In terms of development, the data shows a significant cluster of businesses are developing:

- big data and machine learning technologies
- internet of things technologies
- robotic technologies.

However, in terms of adoption, the data shows a slightly different pattern, with a significant cluster of businesses adopting:

- big data and machine learning technologies
- photonics technologies
- additive manufacturing technologies.

These technologies matter because they are expected to define the shape, form and function of the future economy. They apply to all sectors and will be critical in supporting competitive advantage.

Case Study: XPERTNEST

XpertNest is based in BCP and operates in the information technology and services sector. The company has been identified as a developer in '**Big Data & Machine Learning**'.

XpertNest is a technology solutions company that specializes in providing innovative digital transformation services. They focus on leveraging advanced technologies such as artificial intelligence, machine learning, blockchain, and IoT (Internet of Things) to help businesses optimize their operations and enhance their digital capabilities.

They use Geospatial Intelligence, Data Processing Platforms, ERP Services, Artificial Intelligence and Machine Learning, Augmented Reality (AR) and Virtual Reality (VR), Hyper-Automation, Video Analytics and Face Recognition and Claims Management Solutions to drive innovation, efficiency, and growth across various industries.

XpertNest is an international company with headquarters in the UK. They also operate in the Netherlands and India.

Loop Technology

With headquarters in Dorchester, Loop Technology are specialists in **industrial automation technology and robotics.** They design and build automated systems for the high value manufacturing sector delivering improved production rates and product quality.

The company are trusted partners of several high value manufacturing **catapult centres** and global robot manufacturers. Their experience in machine vision, industrial robotics and motion control systems allows them to create advanced solutions for niche manufacturing problems across many industries.

Their expertise includes automated preforming for composite structures, robotic arms for confined spaces such as aircraft wing boxes, automated laser cleaning, robotic machining, and vision-based inspection.

Loop Technology recently announced a partnership with Boeing, Spirit AeroSystems and AMRC that will see their automated composite preforming technology, FibreLINE, used to drive innovation in advanced manufacturing and address the growing demand for lighter aircraft whilst meeting the aviation industry's commitment to decarbonisation.

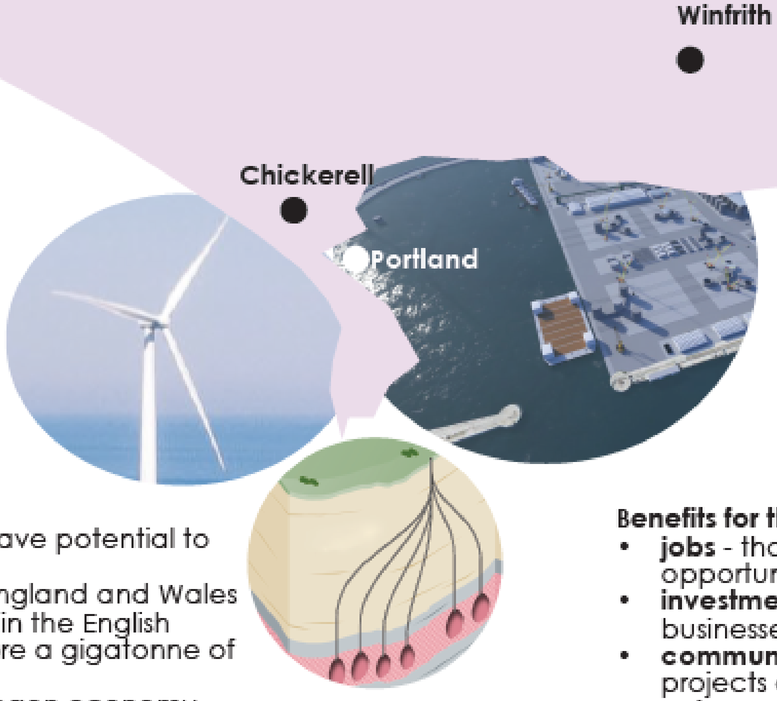
Moreover, a separate FibreLINE configuration is used at the National Composite Centre in Bristol in efforts to deliver multi-sector automated deposition capability for composite material.

Dorset's Clean Energy Supercluster

Small Modular Nuclear Reactors (SMRs)
As an existing nuclear licenced site, **Winfrith** has the potential to host **Small Modular Reactors** which could power our digital and defence growth sectors, as well as millions of homes and provide baseload generation for more than 60 years.

Offshore Wind Opportunities South of Portland
Subject to future leasing rounds by The Crown Estate, there is significant potential to develop floating and fixed based offshore wind projects in the English Channel off the Devon and Dorset coasts.

For example, the c.2GW **Portwind Offshore Wind Farm** currently being planned by Portwind, has the potential to power over 3 million households annually and if linked to battery storage and hydrogen production, could contribute to energy security in the South West.



Channel Gateway
Is a proposal to devellop a new renewable energy port facility at Portland Port to service offshore wind projects in the Celtic Sea, English Channel and across Europe.

The new port will be the only large-scale deep water offshore wind port on the South Coast. It therefore offers a unique location for offshore wind suppliers or developers to develop manufacturing, integration or assembly facilities.

Unique Geological features
Dorset's unique geology means that we have potential to both:

- lead decarbonisation in the South of England and Wales through **Carbon, Capture and Storage** in the English Channel where there is potential to store a gigatonne of carbon dioxide and
- expand and accelerate the UK's hydrogen economy through the development of the **UK's largest hydrogen storage site.**

Dorset is the only place in the south of England with the right geological conditions to store hydrogen deep underground. UKEn is working on a £1bn project to utilise salt caverns in South Dorset to provide up to 17% of the UK's forecast **hydrogen storage** needs by 2050. The storage will provide **security of supply** to hydrogen clusters in the south of England and Wales, buffering demand/supply spikes and ensuring pipeline stability. The project will allow **green hydrogen** to be produced from excess clean renewable power, allowing it to be stored for future use.

Benefits for the pan Dorset area

- **jobs** - thousands of well paid, good quality jobs and training opportunities
- **investment** - attracting investment and supply chain businesses
- **community benefits** - interms of investments in community projects as well as lower energy bills
- **net zero** - faster progress towards net zero

Benefits for the UK

- **energy security** - maintaining a secure and affordable energy supply
- **climate protection** - protecting future generations from the cost of climate breakdown
- **new industries** - creating new industries and export opportunities
- **job creation** - supporting job creation across the UK
- **accelerate net zero and industrial decarbonisation**

Three universities producing 7,500 graduates each year, but low levels of graduate retention

We have three universities which produce almost **7,500 graduates each year**[5] and key subjects include:

- business and management
- design and creative and performing arts
- subjects allied to medicine
- computing.

However, research by ONS[6] exploring graduate retention, found that Bournemouth was the only town in the area to have a positive net gain of graduates. In contrast, **all other towns in the area struggled to attract and retain graduates.** Our plan seeks to address this area of untapped potential.

As well as producing graduates, our universities play a much wider civic role, which contributes to the economic and social well-being of the area. For instance:

- **The Health Sciences University** is home to the **Centre for Workforce and Systems Integration,** which aims to drive change by supporting workforce transformation, promoting knowledge exchange, and offering comprehensive professional development programs for healthcare professionals, healthcare educators, healthcare leaders and policymakers
- The **Arts University Bournemouth (AUB)** offers a range of **collaboration opportunities** with local businesses including research, high skills development, prototyping, entrepreneurship, knowledge exchange and an **Innovation Studio** – which operates as a lab for creative technologies and a hub for start-ups, regional enterprises and industry engagement. It also makes a significant contribution to the area's cultural scene
- **Bournemouth University's** academics and students are working with local partners in projects to:
    - help people live better, for longer
    - protect and preserving a sustainable environment;
    - help people and organisations to prepare for and recover from crisis
    - challenge marginalisation, misinformation and underrepresentation
    - help creative and cultural industries to thrive
    - acting as a catalyst for growth, using our skills and expertise to boost skills and advance the region.

Two Further Education Colleges, which play a vital role in our community and work to meet the needs of the local economy

- **Bournemouth and Poole College** - which serves 9,000+ learners a year and works with over 1,000 employers across nearly every sector of the economy. The college serves 16-18's, apprenticeships and adults studying up to degree level at its recently opened university centre
- **Weymouth and Kingston Maurward College** – recently merged, the college brings together a vibrant land-based college in the heart of Dorset with Weymouth college, which offers a diverse range of courses to over 2,500 students in partnership with over 400 employers.

As well as specialist providers, such as the **RNLI College**, which trains volunteer crews and lifeguards from around the UK.

[5] Higher Education Statistics Agency, HE qualifiers by subject of study, all levels 2021/22

[6] Geographical mobility of young people across English towns and cities, March 2024

Green shoots of recovery in our towns

Our town centres, district centres and local centres form an intrinsic part of our community life and play a vital role in attracting people to the area. However, like many towns across the UK, our high streets have faced a range of challenges in recent years which were further accelerated by the pandemic.

Despite these challenges, with some funding and a concerted effort by a range of partners, we have begun the process enabling our communities to re-imagine and re-invent our towns to unlock new opportunities. For instance:

- In Bournemouth, a **£22m town deal** aims to turbo charge ambitious plans for Boscombe whilst protecting its unique heritage and character with 10 major projects. Whilst in **Bournemouth town centre**, a determined effort across multiple partners (including BCP Council, the Town Centre BID, Destination Management Board, Bournemouth University, and the police amongst others) is co-ordinating efforts in making the town clean, safe and vibrant. Whilst there is much more to do, examples like the re-imagination of Bobby's department store by its new owners (Verve Properties) as a multi-function destination, centred around beauty, health, food, drink, art, culture and community and the redevelopment of the buildings previously home to House of Fraser and Beales, are leading the way as flagship projects
- The **Poole Regeneration programme** aims to deliver a transformative sustainable regeneration of the entire centre of Poole. This includes **Holes Bay**, the largest brownfield land regeneration site in the South West with potential for 830 new homes as well as employment land and commercial opportunities. Within the town centre, work by L&G, owners of the Dolphin Shopping Centre, has transformed the centre to include: a creative/maker space, event/exhibition/workshop space, workspace and market spaces alongside a conventional retail offer
- In Weymouth, a **£19.5m Levelling Up fund** project aims to regenerate Weymouth's waterfront economy with a range of projects around the harbourside to create or improve hospitality space, create new residential units, improve public spaces and create retail spaces. This project helps to deliver parts of the long-term vision for the area
- Similarly, **in BCP, £19.9m Levelling Up funding** was awarded to revive visitor facilities and public amenities linking across Bournemouth and Poole's award-winning seafront, aligned with the Seafront Strategy
- **Six Business Improvement Districts** have been set up and are well established across the area including Bournemouth (coastal and town centre), Christchurch, Dorchester, Poole and Weymouth. A BID is a business-led and funded body formed to improve a defined commercial area. In addition, an **accommodation BID** is in the process of being set up across the BCP area which will allow a tourism tax to be applied to hotel rooms, which is expected to provide a new sustainable model to fund the delivery of destination marketing, large scale events and other initiatives encouraging year-round leisure and business tourism.

Whilst these projects illustrate how public and private sector partners are working together to drive investment in our towns, further creative thinking, working together closely with Government, and enabling communities to do more for themselves, is likely to be required to maximise these opportunities and overcome market failures.

With a vibrant cultural and visitor experience

Our towns, coast and countryside support a visitor economy which attracts almost 24 million visitors a year who spend over £1.6bn in the local economy.[7]

The sector is facing significant challenges post pandemic. Significant shifts in consumer behaviour point to a need to re-balance our visitor economy in favour of higher quality, year-round, staying visitor and business tourisms markets. These markets can be supported by the area's wide range of natural, cultural and heritage assets, such as the Jurassic Coast, Bournemouth Symphony Orchestra, Corfe Castle, Kingston Lacy House as well as festivals, museums, theatres and much, much more.

Recognised for its biodiversity and landscape character

The pan-Dorset area is also recognised for its **biodiversity and landscape character**, with 52% of the landscape designated as a National Landscape. Surprisingly, almost 20% of the BCP conurbation comprises SSSI's, reflecting the high quality of the national environment so close to our principal urban centre. However, despite these designations much of our wildlife is at risk.

Figure 1: Key natural capital assets

52% of landscape is designated as Natural Landscape (1,129km² covered by the Dorset National Landscape and 278km² by the Cranborne Chase National Landscape)

The Dorset and East Devon Coast World Heritage Site (or Jurassic Coast) is 155km long and approx. 1/3 of it is in the pan Dorset area

There are 20 priority terrestrial habitats covering 19,900ha and 15 marine priority habitats

23 internationally designated wildlife sites, 154 nationally designated sites and 1,336 local sites (although it should be noted that many designations overlap)

The Cranbourne Chase National Landscape is the first in the country to be designated in its entirety as an International Dark-Sky Reserve

There are over 11,000 heritage assets across the area, with 273 identified as 'at risk'

Source: Natural Value 2023: The Stage of Dorset's Environment. Dorset Local Nature Partnership

Our natural environment and our **cultural assets** are key drivers of our **tourism sector** and provide the foundation on which much of our economy is built, through ecosystem services such as flood control,

[7] The economic impact of Dorset's Visitor Economy, 2022, SWRC, December 2023

climate regulation, pollination as well as recreation and tranquillity which support our health and well-being.

Contributing to UK food security

Our farms make a vital contribution to UK **food security** and the area has an emerging reputation for the development of **agri-tech**. As such, our agricultural sector provides opportunities for a proactive response to climate change and improved food security and a new generation of agri-tech could diversify and strengthen our agricultural roots.

Similarly, our excellent water quality means that our coast has the potential to contribute to the growth of the English Marine **aquaculture** sector with an emerging cluster of aquaculture businesses operating off Dorset.

Case Study - Cefas, (Centre for Environment, Fisheries, and Aquaculture Science)
As an Executive Agency of Department for the Environment, Food and Rural Affairs, Cefas spearheads sustainability efforts for UK waterways, striving for robust marine and freshwater ecosystems. Its work relies on cutting-edge technology and data-driven approaches, utilising a range of surveillance tools and deploying assets like the Cefas **Endeavour Research Vessel** and autonomous marine vehicles to **monitor aquatic environments** meticulously.

Cefas assembles specialists across aquatic sciences domains to address challenges from aquaculture to future energy. This proactive stance extends to rapid response to marine and freshwater emergencies.

Cefas's laboratory in Dorset is a hub for innovation, integrating advanced technologies with cutting edge research. It collaborates closely with stakeholders to pioneer solutions, offering services such as regulatory testing and modelling for risk assessment through its Weymouth Laboratory and the Cefas aquaculture regulatory toolbox, ensuring streamlined processes for aquaculture supply chain companies.

Our Opportunity Map

Two colleges: Bournemouth and Poole, and Weymouth and Kingston Maurward

3 universities with 7,500 graduates each year

14 Blue flag beaches

National Sailing Academy Weymouth

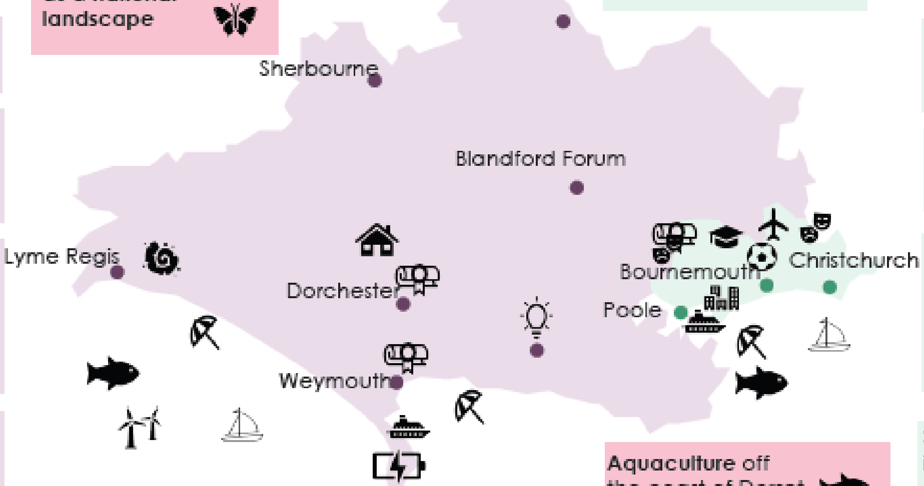
Onshore renewable energy across the area

Jurassic Coast UNESCO World Heritage Site 95miles of coast representing 185m years of history

£19.5m Levelling-Up funding to support **waterside regeneration in Weymouth**

52% of the land area is designated as a **national landscape**

AFC Bournemouth Permier League football club



Dorset Innovation Park - An advanced engineering cluster of excellence with strengths in marine, defence and energy and hoe to **Battlelab** - a state of the art defence, innovation and collaboration space. Potential for **small modular nuclear reactors**

Portland Port - Sheltered deep water port, perfectly positioned serve as a hub for the energy cluster and support offshore wind manufacturing and assessmbly through the **Channel Gateway project**

Offshore Wind opportunities off the Devon and Dorset Coast

Carbon, Capture and Storage sites in the English Channel

Hydrogen Storage in salt caverns in South Dorset

Aquaculture off the coast of Dorset and Poole

Port of Poole - with a new deepwater facility and masterplan, the Port has ambitions to become the UK's No. 1 marine leisure destination as well as a leading green port

Growing **cruise** destination

£19.9m Levelling up funding to be invested in the BCP seafront to support the **seafront strategy**

Regeneration of **Poole town Centre** as a sustainable health and vibrant place

£22m **Town Deal** to create a 'Better Boscombe'

Bournemouth International Centre - investment in the BIC so that it stands amongst the very best event venues in the world

Smart City – the UK's first open innovation system using full 5G and data platform

Bournemouth International Airport and Aviation Business Park - Opportunity to create the UK's newest cargo hub to serve London and the South East

Centre of excellence in Aerospace Maintenance, Repair and Overhaul

Lansdowne Central Business District - providing office space and homes

Holes Bay - a 16ha former power station for 830 new homes and employment land

Wessex Fields - 7.1ha strategic employment site linked to the Royal Bournemouth Hospital for a med-tech science park

Talbot village Innovation Quarter – 4.7ha linked to BU and AUB for health, innovation and incubation space

5 national portfolio organisations and wealth of cultural assets, including Bournemouth Symphony Orchestra

Shared cultural ambitions to nurture and retain creative talent, promote tourism and support a year round high quality inclusive arts, heritage and cultural offer

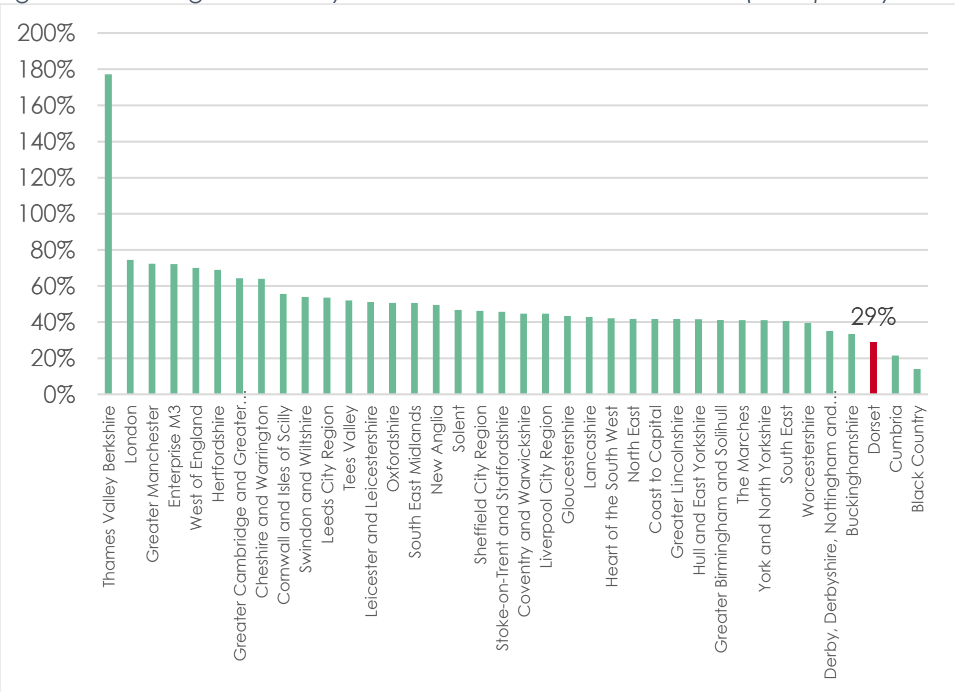
Challenges

Whilst we are fortunate in our bounty of opportunities, we must also recognise and address the challenges which are holding back our economy and opportunities for our residents.

Our growth has been slower than other places

Figure 2 shows that between 1998 and 2022, economic output increased by only 29% in real terms and that of the 38 enterprise areas in England, **only the Black Country and Cumbria grew more slowly.** This means that our economy is falling behind and if this trend continues there will be fewer opportunities for our residents.

Figure 2: % change in GVA by LEP area between 1998 and 2022 (2019 prices)

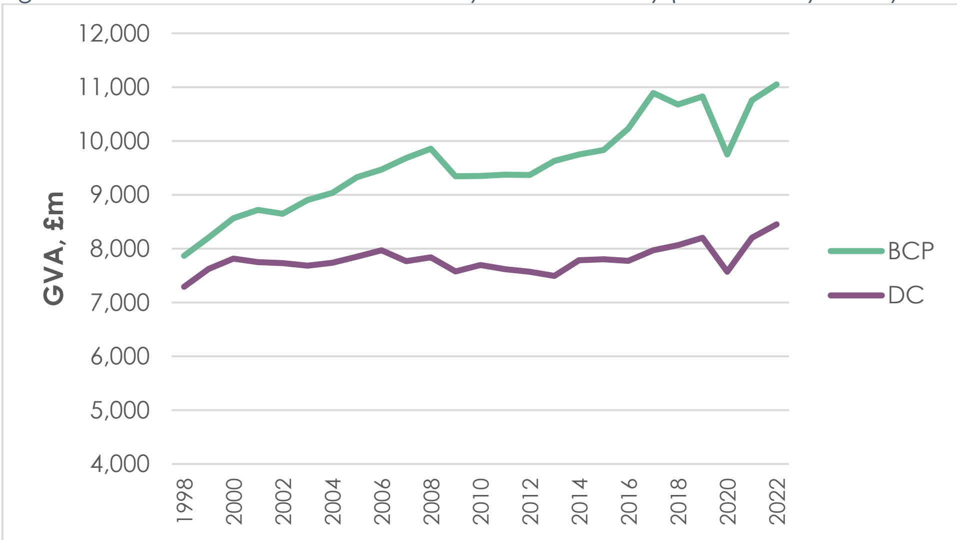


Source: ONS, Regional Gross Value Added (balanced) by industry: City and Enterprise Regions

Whilst output growth has been stronger in BCP than DC it still lags behind the national average

Figure 3 shows that whilst GVA grew by 41% between 1998 and 2022 in the BCP area, it only grew by 16% in the DC area. This compares to growth of 50% for the South West and 52% for the UK.

Figure 3: GVA between 1998 and 2021 by Local Authority (2019 money value)



Source: ONS, Regional Gross Value Added (balanced) by industry: City and Regions

This low level of growth is due to a combination of:

- lower than average productivity
- a plateauing working age population.

Taking each in turn.

Lower than average productivity

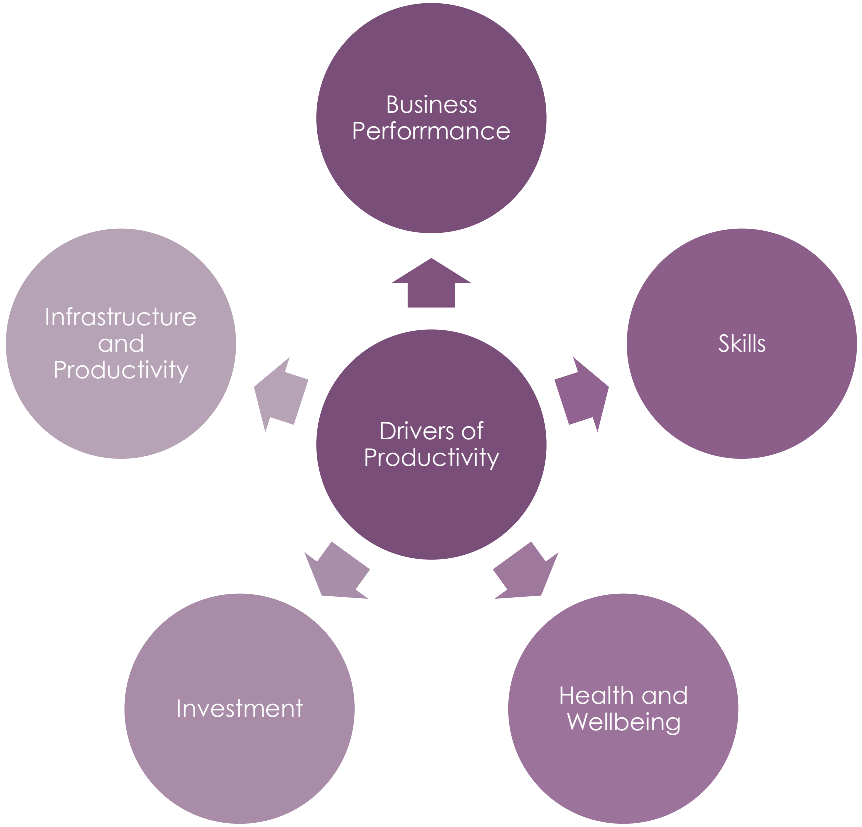
Productivity in 2021 was £33.7 per hour worked, compared to £38.33 per hour for the UK (£34.8 for BCP and £32.4 for DC). This **£4.63/hour gap equates to an output gap of £2.68bn a year.** Furthermore, analysis by the Productivity Institute categorised UK sub-regions into four groups:

- steaming ahead (above average productivity and faster than average growth in productivity)
- losing ground (above average productivity, but lower than average growth in productivity)
- catching up (lower than average productivity, but faster than average growth in productivity)
- falling behind (lower than average productivity and lower than average growth in productivity).

Both the BCP and DC areas fall into the **'falling behind'** group.

Productivity matters because it remains the key determinant of wages and living standards - therefore our productivity gap also manifests itself as a **wage gap**. In 2023, gross median weekly pay for full time workers was £616 in the DC area and £662 in the BCP area, compared to £681 for UK workers.

However, the productivity issues within the Pan Dorset area are set within a wider **national productivity challenge**. Between 2010 and 2022 the annual average growth in UK GDP per hour worked was just 0.5%, with little sign of improvement in recent years. The reasons for this remain the subject of intense debate, however, at a regional level, key drivers of productivity include:



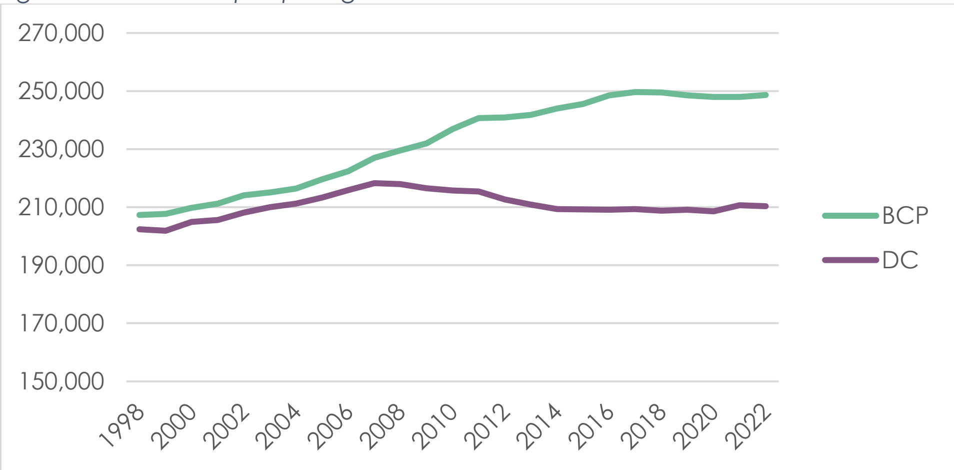
Source: Productivity Institute

What is productivity and how does it differ from growth?
Productivity is a measure of value created for each hour that is worked in a society – therefore it can be thought of as an efficiency measure. Growth on the other hand relates to the overall size of the economy and how that has changed (see figure 3 above).

A plateauing population of working age people

Figure 4 below shows that **the number of working aged people in the DC area plateaued** between 1998 and 2022 which helps to explain the poor overall growth. On the other hand, the number of working aged people continued to grow in the BCP area until 2016 after which the number of people also appears to plateau. This is consistent with the pattern of GVA growth shown in Figure 3.

Figure 4: Number of people aged 16-64



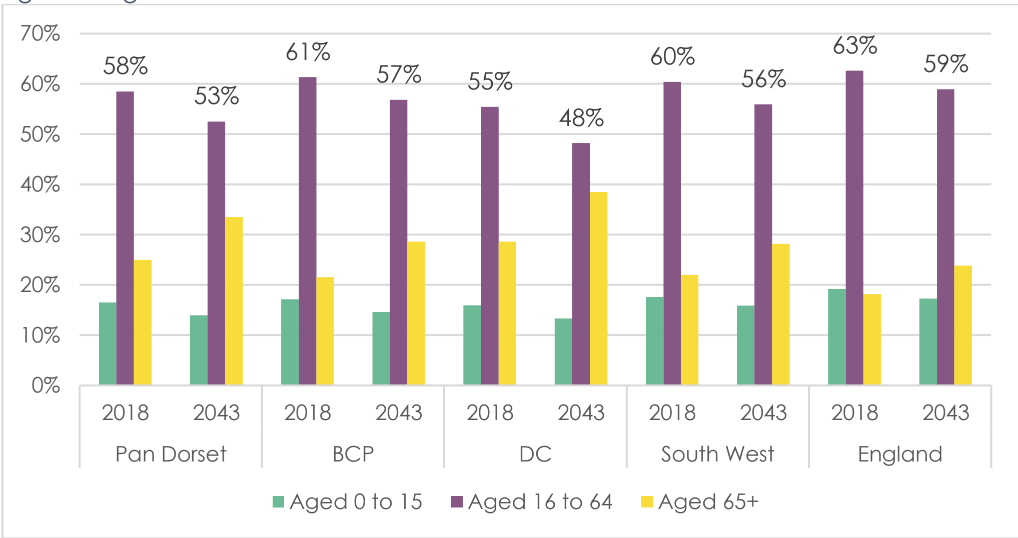
Source: ONS Mid-year population estimates

Our population is ageing at a faster rate than the rest of the UK

In 2022, 58% of our population were aged 16-64 compared to 63% for England[8] (62% for BCP and 55% for DC). As the England figure is not projected to reach 58% until after 2043, we are **20 years ahead of the national trend.** This means we can be a **test bed for how to manage economic growth in an ageing society**.

The aging trend is set to continue and ONS projections indicate that **by 2043 only 53% of people will be aged 16-64 in the pan-Dorset area** compared to 59% for England. The demographic challenge is particularly significant for the Dorset Council area where only 48% of people are expected to be of working age by 2043, compared to 57% in BCP. See Figure 5 below.

Figure 5: Age Profile in 2018 and 2043



Source: ONS Population Projections 2018-based

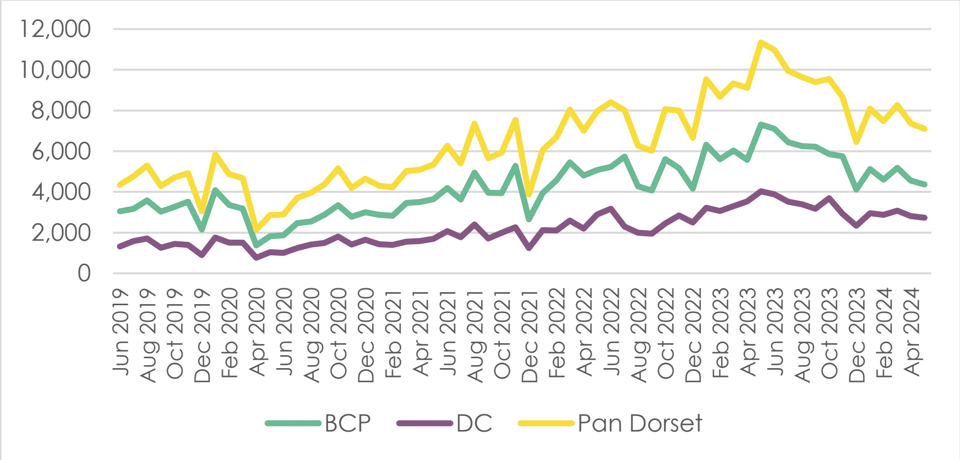
Fewer people of working age will mean that the area will have **fewer people to fill jobs in all parts of our economy and existing labour market shortages will become even more extreme**. Therefore, maximising participation in the labour market will be a key priority for us.

[8] ONS, Mid-year population estimates

Strong demand for labour

The **demand for labour has been increasing since the pandemic**, with vacancies reaching a peak in May 2023 (See Figure 6). Whilst demand appears to have softened slightly since then, employers are continuing to report **significant recruitment challenges**, particularly in the BCP area.

Figure 6: Monthly unique postings (new posts) – Pan Dorset Jan 2020 to May 2024



Source: Lightcast ™ 2024

Replacement demand will drive demand for labour

In the medium term, we must also recognise the challenge associated with replacement demand, linked to the age profile of our current workforce. In 2023, **38% of all economically active people in the pan Dorset area were aged over 50**, compared to 32% in the UK (34% in BCP and 43% in DC).[9] Therefore, there will be **significant replacement demand as this cohort starts to retire** over the next 10 years. Indeed, 84% of the projected employment change (204,000 jobs) between 2020 and 2035 is expected to be driven by replacement demand, compared to 39,000 associated with growth.[10]

Despite our tight labour market, there are approximately 25,500 workless people in the area who would like to work

Our labour market is relatively tight. Compared to the national average, we have **a lower proportion of people who are unemployed and inactive**, and the proportion of workless people has been going down since the pandemic.[11] Despite this positive picture, in absolute terms, there continues to be a large number of people who are unemployed or inactive in the area. As of December 2023, there were:

- 10,300 unemployed 16–64 year-olds (6,500 in BCP and 3,700 in DC)
- 84,600 economically inactive 16-64 year-olds (47,900 in BCP and 36,700 in DC).[12]

National estimates indicate that approximately 18% of inactive people wanted a job[13], [14] which, when combined with the unemployed population, would suggest that **there are approximately 25,500 workless people in the area who would like to work**. Helping these people back into the labour market is a key opportunity to improve the health, wealth and well-being of our residents.

[9] ONS, Annual Population Survey, December 2023
[10] Institute for Employment Research, the Skills Imperative, Dorset LEP workbook. Note, this data is not available at local authority level.
[11] ONS, Annual Population Survey, December 2023
[12] ONS, Annual Population Survey, December 2023
[13] ONS, Annual Population Survey, December 2023
[14] National estimates used as local data has significant variability and is not very reliable for this indicator

Long term sickness and early retirement are now the most significant reason for economic inactivity

The most significant reasons for inactivity amongst 16-64 year olds include: long-term sickness, being a student, being retired and looking after family/home.[15] **Since the pandemic, the proportion of people that are inactive due to long-term sickness has been increasing**, with the latest figures suggesting that almost 25% of inactive people in the area are inactive for this reason. Understanding and tackling this challenge, could give a significant boost to our economy.

However, within the **DC area, the most significant reason for inactively was (early) retirement**, with approaching 30% of inactive people in the area inactive for this reason.

Whilst people in both the BCP and DC area generally live longer than the England average, **health outcomes are strongly linked to deprivation levels**. In BCP the difference in life expectancy between the most and least deprived areas was 8.9 years for men and 6.1 years for women. Similarly in the DC area the difference was 5.3 years for both men and women.[16]

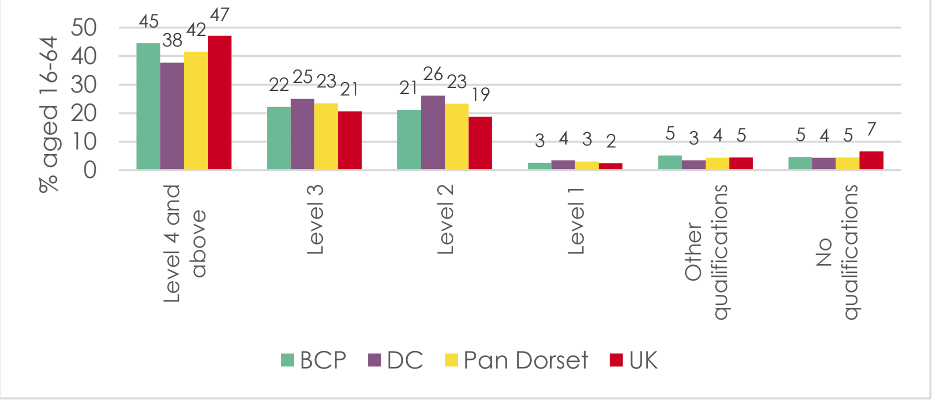
High levels of part-time work

The area has a **higher proportion of people working part-time** (particularly in the DC area and amongst women). A recent review by the Productivity Institute suggests that while part-time work can be a mechanism to enable productive lives by allowing retention in career jobs and/or reducing work burdens for those with care responsibilities or ill-health, it may also limit talent utilisation and therefore affect productivity.[17]

And a lower proportion of people with high level qualifications

Despite the presence of three universities, Figure 7 shows that whilst the area has higher than average 'mid level' qualifications (Levels 2 and 3), it has a **lower proportion with Level 4 or higher** qualifications. This matters, because higher skills levels are a key driver of growth.

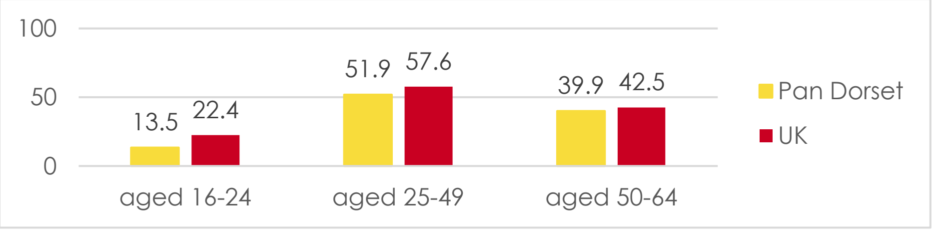
Figure 7: Highest level of qualification achieved (aged 16-64)



Source: Annual Population Survey, ONS

Figure 8 shows that the Level 4 gap between people in the Pan Dorset area and the UK is largest for the younger age groups, which potentially highlights the graduate retention challenge.

Figure 8: Proportion with Level 4 qualifications by age



Source: Annual Population Survey, ONS. Note, data not broken down by LA, as the sample size is too small and the data is not reliable

[15] ONS, Annual Population Survey
[16] Fingertips Public Health Data
[17] The Productivity Institute, Part-time work and productivity (2024)

Case Study: Dorset Careers Hub

Dorset Careers Hub connects education and employers with the aim of improving the careers provision across the region.

Funded by Dorset LEP and The Careers and Enterprise Company (CEC) in partnership with BCP Council and Dorset Council, its role is to help young people in Dorset progress into promising careers and fulfil their potential. It does this by:

- Raising the quality of careers provision in schools, special schools and colleges by supporting them to achieve the national careers education quality standards
- Linking teachers and young people with employers to drive more high-quality experiences through a network of 63 volunteer Enterprise advisors and 15 Cornerstone Employers
- Amplifying apprenticeships, technical and vocational routes
- Addressing the needs of economically disadvantaged young people and those who face the most barriers
- Connecting careers provision in schools and colleges to the needs of the local economy

Performance of the Careers hub is measured against the Careers Education Quality Standards, the Gatsby Benchmarks. In 2023/24 institutions supported by Dorset Careers Hub achieved an average of 6.6 Gatsby Benchmarks, compared to 5.9 nationally and Dorset schools and colleges are collectively in the top national quartile for four of the eight Gatsby Benchmarks.

High house prices relative to incomes are constraining the labour market

Median house prices (2023) in the area ranged from **10.23 times median earnings** in the BCP area to **11.03 times median earnings** in the DC area.[18] This compares to 9.27 in the South West and 8.26 in England. A similar pattern was observed for lower quartile price to income ratios. This means that **housing is simply not affordable for many people in the area**, especially people on low incomes. Within this context it should be noted that **39,000 jobs in the pan-Dorset area were paid below the living wage** in 2023 (18,000 in BCP and 21,000 in DC).[19]

A **shortage of affordable housing and high house prices can affect productivity** by limiting the ability of workers to move to productive places with high wage jobs, resulting in labour shortages and eroding potential agglomeration benefits. Employers attending a Dorset LEP Homes and the Economy conference in February 2024 provided examples of how they struggled to attract and retain staff due to the availability and affordability of housing.

Researchers from the University of the West of England[20] identified that increases in affordability ratios in the South West were driven by earnings not keeping up with house prices. Increases in house prices in turn have been fuelled by shortfall in the delivery of new homes, coupled with increasing demand associated with migration and second home ownership. The researchers also found a number of supply side issues which affected housing affordability including competition for land, development viability, right to buy, planning and environmental designations.

[18] Source: House price to workplace-based earnings ratio, ONS
[19] ONS, Number and Proportion of employee jobs with hourly pay below the living wage
[20] Housing affordability in the South West of England. University of the West of England on behalf of Homes for the South West. March 2023

Case Study: Modern Methods of Construction
In June 2023, Magna, a Dorset based housing association delivered its first rural modular build using Modern Methods of Construction in Halstock Dorset. Manufactured off-site and delivered into communities, the MMC process reduces disruption and waste normally associated with new builds.

Magna's portfolio of 12 house types has been designed by Dorset-based manufacturer, Rollalong and with a wide range of finishes can be designed to complement the area's architectural heritage. The homes also go beyond current building regulations, with enhanced air tightness, additional insulation and solar panels, making them warmer and cheaper to run.

Land constraints

Development of land for housing or business use is severely constrained in the BCP area due to a mixture of:

- the green belt around BCP which halted outward expansion
- the proportion of land covered with environmental designations
- the sea to the south.

This means the area needs to focus on delivering sustainable growth within the existing urban area and making efficient use of brownfield land and grey belt. We also need to ensure that many sites across the area with current planning permission for thousands of homes are built out.

Whilst the DC area is also constrained by the same issues, its more rural character means there is more scope for growth, particularly for industrial uses which require more space.

Transport connectivity remains a challenge

Work on the fourth local transport plan for the area highlights a range of infrastructure challenges including:

- north/south connectivity to the area by road/rail to and from Bristol, the Midlands and the far South West
- congestion hotspots on the A31, A35, A351 which worsen with tourist seasonality and high (and increasing) levels of car based commuting
- poor rail connectivity both to and within the region and constraints on main lines into the region restrict the development of rail services (including freight). Furthermore, the level crossing in Poole creates a barrier to more frequent train services
- large rural areas without high quality infrastructure that encourages walking and cycling as the default option
- poor electricity grid capacity acting as a barrier to EV charging infrastructure.

Analysis shows that there is a significant gap between the current trajectory and meeting net zero targets for transport.

Digital connectivity is a challenge in the Dorset Council area

Whilst fixed broadband connectivity is better than the national average in BCP (with 100% of premises having access to decent broadband and 99% having access to superfast broadband), in the DC area fixed broadband connectivity is worse than the national average with 3% of premises unable to access decent speeds.[21] **Lack of digital and transport accessibility is a significant growth constraint in rural areas in particular.** However, with improving levels of 5G coverage, both councils have delivered pioneering projects to demonstrate the benefits of 5G including BCP's Smart Place programme.

Case Study: Smart Place Opportunity
BCP's Smart Place programme is an initiative to improve the lives of the community by developing technological solutions for some of the biggest challenges in our society, such as health and social care, mobility and the environment and industry and logistics.

At the heart of this plan is the vision to build Smart Places that create significant value from within cities, towns and other areas, through a unique, financially successful business model that provides a range of major investment opportunities. BCP Council and Smart Place are offering major investment opportunities across four programmes:

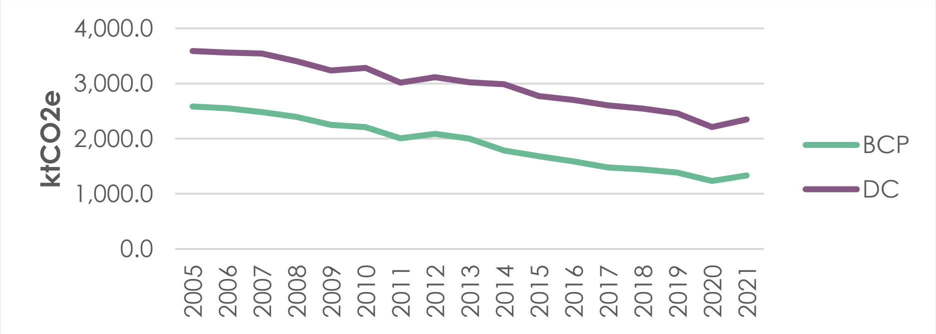
- Gigabit Speed Fibre
- 5G Solution
- Place-based Data Insight System
- Place-Based Integrated Applications.

Climate and ecological emergencies

Both Dorset Council and BCP Council have **declared climate and ecological emergencies** and have set out ambitions for the area to be carbon neutral by 2050 or earlier. They are also working together and with partners to prepare a **local nature recovery strategy** for the Pan Dorset area.

The challenges are significant. Figure 9 shows that between 2005 and 2021 greenhouse gas emissions reduced by 40.3% across the Pan Dorset area (48% in BCP and 35% in DC).

Figure 9: Total Greenhouse gas emissions between 2005 and 2021



Source: UK local authority and regional greenhouse gas emissions national statistics 2005-2021

Climate change is expected to affect almost all aspects of our life, but as a coastal area, climate related flooding could pose an existential risk to the pan Dorset area.

At the same time, the area's **environment has been seriously degraded over the past 80 years**. Declining levels of biodiversity, soil degradation and falling water quality all impact on the ability of our natural world to mitigate the impacts of climate change and provide wider ecosystem services.

[21] Source: Connected Nations, Summer 2023

Whilst responding to the climate and ecological emergency is one of the biggest challenges we face, it also provides opportunities to:

- create skilled jobs,
- make our food and energy systems more secure and
- make our homes and transport systems healthier and cheaper to run.

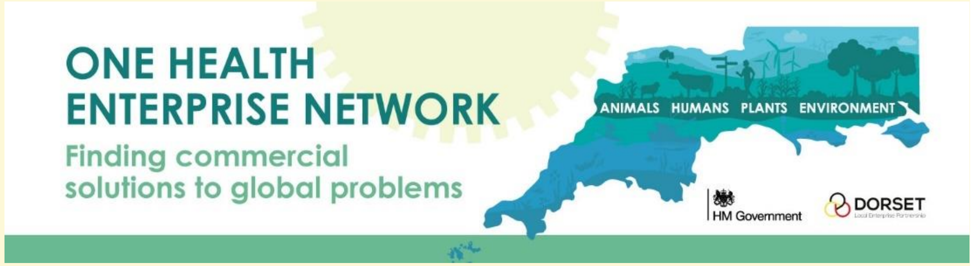
Addressing sustainability challenges is a key area of research for Bournemouth University which has just been ranked in the top 10 in the UK for its sustainability[22].

Case Study: Protecting coastal and freshwater regions
Natural reefs are one of the most diverse ecosystems in the world, but they are rapidly disappearing. To combat this, a team of BU marine scientists are trialling the deployment of artificial 3D printed reef blocks in Poole Bay. Working with other European universities, the findings from the project will be used to perfect the design of 3D printed artificial reefs and prove their use in providing a habitat for marine life.

Case Study: One Health Enterprise Network
One Health is an internationally established approach that acknowledges the interconnectedness of human, animal, plant, and wider environmental health. Globally recognised, the 'One Health' approach is advocated for by the World Health Organisation (WHO) and its international partners.

The One Health Approach offers a framework for industry, academia, and policymakers to guide the design, development, and implementation of new ideas and products. It ensures 'green' and 'clean' innovation to tackle global challenges like sustainable food production, pollution, and climate change.

The Dorset Local Enterprise Partnership's One Health Enterprise Network (OHEN) supports businesses to connect with research institutions and wider partners across industry and government to design and develop clean, green solutions to global challenges arising from changing environments (including from climate change).



[22] https://www.bournemouthecho.co.uk/news/24382142.bournemouth-university-achieves-sustainability-rankings/

Our growth driving sectors

The pan-Dorset area has a number of high value sectors where we have a clear comparative advantage.

Advanced manufacturing

The pan Dorset area is a thriving hub for Advanced Engineering and Manufacturing. The sector employs approximately 24,000 people in the area and accounts for £1.1bn GVA.

With major primes and their supply chains already flourishing we offer a fertile ground for expansion and partnerships, building on our strengths in **key enabling technologies**.

Supported by the **Dorset Engineering and Manufacturing Cluster** group, the sector benefits from a range of R&D assets including:

- **Dorset Innovation Park**, an enterprise zone that is developing as an advanced engineering cluster of excellence for the SW
- Bournemouth University's **Joint Centre of Advanced Materials** with Northeastern University in China which focuses on creating new materials that can have large scale applications in manufacturing, healthcare and consumer products
- **The Innovation Studio at AUB**, which features state-of-the-art equipment and digital resources, plus the latest digital and physical manufacturing technology
- The **Centre for Plastic Identification and Curation at AUB**, which will explore how plastics degrade over time or behave in different environments
- Close links to 11 neighbouring universities and the National Composite Centre, located at Bristol & Bath Science Park and Satellite Applications Catapult.

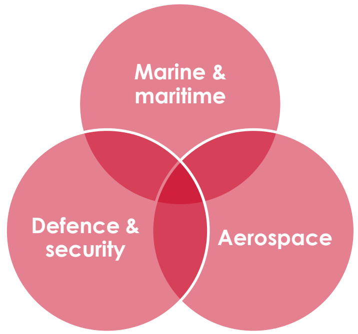
Advanced Manufacturing in numbers:

Employment	Businesses	GVA	Growth since 2010
24,000	1,700	£1.1bn	15%

For every one person employed in the UK, we employ…

14 building pleasure and sporting boats
8 manufacturing military fighting vehicles
7 manufacturing office machinery and equipment
7 repairing and maintaining aircraft and spacecraft
7 manufacturing electric motors, generators and transformers
5.5 repairing and maintaining ships and boats
5 manufacturing other special purpose machinery
4.5 manufacturing electric lighting equipment
4 manufacturing of other general-purpose machinery n.e.c.
3 manufacturing wire products, chain and springs
3 manufacturing of instruments and appliances for measuring, testing and navigation

The location quotients above illustrate our overlapping specialisms in marine, defence and security and aerospace, which are supported by high levels of **supply chain integration**. Our capabilities can also be utilised to support our **clean energy cluster opportunity.**



Advanced manufacturing: marine and maritime

Dorset is a leading force in clean propulsion, security and yacht manufacturing with a significant share of marine manufacturing jobs in Southwest England.

The sector benefits from:

- **2 ports (including Poole and Portland) and 3 harbours.** This includes opportunities for the creation of a marine innovation cluster at the Port of Poole and support for floating offshore wind through Portland Harbour
- Being part of a wider cluster which spans the South Coast, with support from **Maritime UK South West** and the British Marine Federation
- A range of leading businesses such as: Sunseeker, Atlas Elektronik UK, AGI/Aish Technologies, Caterpillar, Marine Power, RNLI, Norco GRP, Global Marine Systems, Manor Energy Group, Wärtsilä, Pixii Boats, Cobra Ribs, Actisense

Case Study: Global Marine

As a key subsidiary of the Global Marine Group, Global Marine stands at the forefront of subsea fibre optic cable installation and maintenance solutions for the telecommunications sector.

From projects in the Arctic Circle to operations in the depths of the Marianas Trench, the company has amassed a wealth of technical expertise, state-of-the-art technology, specialised equipment, and valuable assets. These resources enable Global Marine to undertake comprehensive activities such as planning, installation, burial, storage, testing, recovery, and maintenance of subsea fibre optic cables – a crucial amalgamation for sustaining global connectivity.

Case Study: Sunseeker

Sunseeker stands as the foremost luxury performance motor yacht brand globally. Renowned for their sporty aesthetics and racing heritage, Sunseeker has evolved into an industry icon.

Operating from its manufacturing hub in Poole, Sunseeker boasts a workforce of approximately 2,200 employees and produces around 130 boats annually. Sunseeker offers industry-leading training and development opportunities and had pioneered the Sunseeker Skills Academy in collaboration with Bournemouth and Poole College.

Case Study: Port of Poole

Poole Harbour, Europe's largest natural harbour, encompasses over 10,000 acres and holds a prime location on the South Coast, with excellent connectivity to major airports and road networks.

As one of the UK's largest trust ports, it handles approx. 30,000 freight units and serves 200,000 outgoing passengers annually. It features:

- Two Ro/Ro berths facilitating cross channel services
- Berths to accommodate containers, general cargo, bulk, project cargoes, yacht transfers and hazardous goods
- Capacity to accommodate vessels up to 9.7m draft and 210 in length
- Sought after destination for cruise ships
- 2 marina's with the esteemed 5 Gold Anchors from the Yacht Harbour Association

Advanced manufacturing: defence and security

As a strategic centre for Defence and Security, Dorset is anchored by a significant Ministry of Defence (MoD) presence which is engaged in research, development and operations. Dorset's geography and secure facilities provide an ideal environment for high-tech development and testing across land, sea, and air. Land-based ranges at Bovington and Lulworth, along with facilities at Blandford Forum, complement sea-based MoD ranges, offering comprehensive support to the UK armed forces.

The sector benefits from:

- Access to **Dorset Innovation Park** and **Battlelab**
- Being part of the **South West Defence and Security Cluster**
- A range of leading businesses such as: BAE Systems Army, BAE Systems Defence & Intelligence, BAE Systems Royal Navy, Battlelab, Amsafe Bridport, Atlas Elektronik UK, Babcock International, Coda Octopus, IAP G3 Systems, QinetiQ, Armour Centre, Intrepid Minds, HeliOps

Case Study: G3 Systems

G3 Systems is an engineering company known for its diverse capabilities in fixed and deployable infrastructure, along with support solutions.

Their services cater to both UK and overseas clients, focusing on integrating hardware systems into various deployable structures such as containerised, soft and hard-walled shelters, covering a wide range of land and sea-based requirements. Their portfolio includes engineering workshops, vehicle repair facilities, office and communications setups, data centres, emergency response and control facilities, medical facilities, and more.

Case Study: Battlelab

Situated at Dorset Innovation Park, the Defence BattleLab is a result of a collaboration with the Ministry of Defence, Dorset Council and Dorset Local Enterprise Partnership. This pioneering and unique facility serves as a hub for end-users and experts from various defence sectors, facilitating collaboration and engagement with the MOD.

As part of the government's **National Strategic Technology and Innovation Exchange** programme (NSTIx), BattleLab serves as a Co-Creation Space for defence innovation.

Case Study: Norco Composites & GRP

Norco Composites & GRP is a leading manufacturer of composite structures for both the commercial and defence industries. They specialise in production of surface vessels, submarines, mast-raising equipment, satcom and defence radomes, and unmanned underwater vehicles.

Advanced manufacturing: aerospace

The pan Dorset area is a leading hub for Aerospace Maintenance, Repair and Overhaul (MRO), which is expected to grow by 4.1% per annum.

The sector benefits from:

- Access to **Bournemouth Airport** and **Aviation Business Park**, which is a centre of excellence in aviation/aerospace manufacturing and MRO
- Opportunities for **airport expansion** to create the UK's newest cargo hub to serve London and the South East
- A range of leading businesses such as: Eaton Mission Systems, Draken Europe, Curtiss-Wright, Honeywell Aerospace, Micro-Nav, Spherea Test & Services, AVIC Cabin Systems, Copperchase, Gama Aviation, Walker AEC, Field International, Aviation Defence, Spares Ltd, Beagle Technologies
- Being part of the **South West Aerospace cluster** which is one the largest and most significant in the world and includes 14 top prime companies and over 800 supply chain companies
- Networking and support through the **West of England Aerospace Forum**

HeliOps
Based in Portland, HeliOps offers bespoke avaiation training and operational services to diverse clients globally, including superyacht owners and Government Departments. With a unique license to operate on the UK Military Register, HeliOps caters to the needs of clients such as the UK MOD, Home Office, and international forces like the German Navy and Norwegian Navy. Its authorisation on the UK Civilian Register has also attracted clients like Exxon Oil Company.

Draken
Draken specialises in adversary training and delivers highly realistic scenarios that serve as rigorous tests for both existing and emerging military hardware, as well as the capabilities of military personnel to fend off attacks. This expertise has positioned Draken as a key participant in major international training exercises, providing support to over 20 nations annually.

Operating from its headquarters at Bournemouth's Aviation Park East, Draken's distinctive dark blue Falcon 20 jets have graced the skies above the South Coast for many years. Equipped with advanced electronic warfare systems, these aircraft have been integral to the UK and allied military training programs since the company's inception as FR Aviation in 1985.

Clean energy

Our clean energy sector benefits from:

- The largest onshore oil field in Western Europe, at Wytch Farm
- Existing port facilities at Portland and Poole which can be deployed to serve as a hub for the Dorset Clean Energy Supercluster. The **Channel Gateway project** at Portland could provide the only large-scale deep water offshore wind manufacturing and assembly port on the South Coast
- An existing **nuclear licenced site** at Winfrith, which has the potential to host Small Modular Reactors in the future
- Unique geological features, which means we have the potential to:
    - lead decarbonisation in the South of England and Wales through **Carbon, Capture and Storage** in the English Channel
    - expand and accelerate the UK's hydrogen economy through development of the **UK's largest hydrogen storage site** to ensure energy security
- The presence of renewable energy resources across the area including solar, onshore and offshore wind to enable the clean energy transition
- Transferable skills from the oil and gas industry from Wytch Farm
- Bournemouth Universities faculty of Science and Technology including its department of Design and Engineering and innovation centre
- A range of leading businesses such as Portwind, UKEnergy Storage, Morwind, Channel Gateway, Latent Drive and Manor Renewable Energy
- Proximity to the Somerset based Hinkley Point C project, Hinkley Connection project and the Gravity enterprise zone, providing an opportunity for learning.

Clean energy in numbers:

Employment	Businesses	GVA	Employment Growth since 2010
5,900	800	£800m	36%

Latent Drive

Latent Drive, a pioneering company based on the Dorset Innovation Park, are making significant strides in the green hydrogen sector with their innovative Catrode® mass-production process. They are currently developing the SeaStack™, a first of its kind direct seawater electrolyser. This cutting-edge technology is uniquely designed for the needs of offshore hydrogen production from renewable wind power, further enhancing the sustainability and performance of offshore hydrogen production.

The company's breakthrough technology not only supports the global shift towards green energy sources but also represents a leap forward in material science.

Manor Renewable Energy

Manor Renewable Energy (MRE) – part of the OEG Group – was established in 2013 and has garnered recognition for its prowess in delivering temporary power and engineering solutions offshore with a fleet of 16 specialist offshore support vessels.

Headquartered in Portland, Dorset, its capabilities include end-to-end engineering solutions, from design to fabrication and has collaborated with numerous OEMs, wind farm developers and operators worldwide.

Financial services (including fintech)

BCP's financial services sector is renowned as a UK Centre of Excellence for financial services, benefitting from a wealth of local expertise, including Fintech. Bournemouth hosts a range of global business headquarters and specialises in securities processing and fund trustee management. Bournemouth also leads in the 'near-shoring' trend, attracting firms relocating jobs from London or overseas back to the UK.

The sector benefits from:

- The **Lansdowne district of Bournemouth** - a key financial centre, where there is new energy efficient Grade A office accommodation and opportunities to develop more
- A range of leading businesses such as: Ageas, Gallagher, Investec, Phoenix, Liverpool Victoria, Morning Data, JP Morgan, Lloyds Bank, BNY Mellon, Teachers Building Society, RiskSTOP Group Ltd, PKF Francis Clark, Vitality Health, Richmond Group, Handlesbanken and Hazeltree
- Support from **Fintech West**, through its new **South Coast Hub**
- Links to a business ecosystem that spans the Western Gateway and Central south areas
- Technical qualifications through BCP College and Weymouth College
- Bournemouth University Business School (which is accredited by the Association of Advanced Collegiate Schools of Business)

Employment	Businesses	GVA	Employment Growth since 2010
24,000	**2,700**	**£1.9bn**	**32%**

For every 1 person employed in the UK, we employ	
	3 in non-life insurance
	2 in other monetary intermediation
	2 in other activities auxiliary to insurance and pension funding
	2 in activities of insurance agents and brokers

Case Study – Implicit
Implicit, a Dorset-based financial software platform, provides cloud accounting software for medium sized businesses and nonprofits.

Launched in 2019, it aimed to challenge the status quo for accountancy software by filling a gap in the market for two different types of organisations:

• Those that were stuck with on-premises software that only functioned with the aid of multiple spreadsheets and manual intervention; and
• Those that had out-grown entry-level cloud systems.

Funded by £18.5m in private investment to date, iplicit has grown by more than 100% annually since 2019 and is on course to do so for a seventh consecutive year. It has more than 30,000 daily users and is structured to scale twentyfold in the next seven years.

It was 18th among UK companies on the 2024 FT1000 list of Europe's fastest-growing businesses. Weeks later, it was named among the top 10 medium-sized employers on the Sunday Times Best Places to Work.

Creative and digital

The pan Dorset area has a strong digital creative scene, with particular strengths in visual effects, gaming, animation, creative agencies, app development and post-production.

The Digital Creative community benefits from a rich talent pool nurtured by the Arts University Bournemouth, Bournemouth University and surrounding colleges. Particular assets include:

- the largest film school outside of London at the Arts University Bournemouth
- centres for digital entertainment, applied creative technologies, computer animation and computing and informatics at Bournemouth University which has the largest centre for professional higher education for film and media in the UK
- courses in animation, computing, IT and creative enterprise at Bournemouth & Poole College

The sector also benefits from:

- access to **Silicon South** as a networking organisation
- work by BCP to establish a Film Office, to promote the area as a destination for filmmakers
- the opportunities associated with BCP's **Smart Places** programme
- the newly consented Innovation Park within the **Talbot Quarter development**, which will offer R&D space for businesses looking to grow across creative technologies including areas of AI, machine learning and AR/VR
- the opportunity to establish an **internet exchange** which could provide low latency dark fibre 5G connectivity enabling R&D in high tech wearables, autonomous robots and augmented reality
- leading businesses such as: End State, Intergage, Love Love Films, Poundbury Systems Ltd, Spyrosoft, Studio Global, Talk Think Do, Treehouse, You are the Media

	Employment	Businesses	GVA	Employment Growth since 2010
Digital	11,100	2,100	£550m	10%
Creative	13,500	2,900	£580m	33%
Combined[23]	17,500	3,300	£820m	23%

Case Study: Treehouse

Nestled in Poole, the Treehouse team stands as frontrunners in animation and film production.

Since 2020, they've honed their craft in Unreal Engine, propelled by a MegaGrant from Epic Games, which culminated in their acclaimed short film, 'The Well'. This innovative technology forms part of a highly collaborative ethos that encourages a team-led studio culture. Following 'The Well', Treehouse collaborated with industry giants Warner Bros. and Paramount.

Presently, they spearhead all visual and animation aspects for Duncan Jones' upcoming feature, 'Rogue Trooper', in partnership with Liberty and Rebellion Films, slated for completion in 2025.

[23] Due to some SIC codes falling in both the Creative and Digital sectors, the combined value is less than the sum of the digital and creative sectors

Health sciences

The pan Dorset area's integrated care system (and associated data), ageing population and wealth of health expertise provide the ideal conditions to create a 'Living Lab' to pioneer solutions to many of the UK's health challenges. Aligned to this, we are leading the UK's approach to 'one health', an integrated approach which aims to sustainably balance and optimise the health of people, animals and ecosystems – contributing to global health security.[24]

As well as our research and innovation assets (see table), health science businesses in our area benefit from:

- **Health Innovation Wessex** – which works with a variety of public academic, commercial and community organisations to identify best practice in healthcare and to drive the adoption and spread of innovation for a healthier Wessex
- Opportunities to develop a med-tech science park at **Wessex Fields** and a consented scheme for a state-of-the-art Nuffield Health Hospital at **Talbot Quarter** with new technology to enhance leading medical research

	Employment	Businesses	GVA	Employment growth since 2010
Health and social care	**54,500**	**2,100**	**£1.5bn**	**20%**
Health science	**1,400**	**60**	**£100m**	**37%**

And our innovation and research assets are highlighted below:

Organisation	Centres and Expertise
University Hospitals Dorset	• Histopathology Diagnostic Hub • Dorset Clinical Trials Unit – which will allow Dorset Companies to deliver research-led health and medical innovations, clinical products and clinical practice enhancements
Health Sciences University	Specialises in health science and key areas of research activity include radiology, chiropractic, rehabilitation, sport and psychology. Includes a new £4.5m state of the art rehabilitation centre, funded through the Getting Building Fund.
Bournemouth University	The faculty of health and social science at Bournemouth university includes: • Clinical Research Centres relating to women's health, orthopaedics and medical imaging (including orthopaedic Research Institute) • Research into long term health challenges including ageing and dementia and well-being • Research into marginalised voices within the health and care system
Bournemouth and Poole College	The Health and Care Academy will expand the college's activities to train people to work in these sectors, including through new T Level courses and progression to Level 4 & 5 and degree level qualifications.

[24] https://www.who.int/health-topics/one-health#tab=tab_1

Orthopaedic Research Institute
The Orthopaedic Research Institute (ORI) works across the university and with hospitals, industry partners and academia to produce high quality research and educational outputs that have a proven impact for patients, clinicians and society.

Producing high quality academic and patient outcomes across the fields of orthopaedic surgery, related diseases, treatments, technologies and devices. World-class research, the latest professional thinking, and clinical best practice are combined to create a rich environment that stimulates new ideas, learning and thought-leadership.

A particular area of expertise for ORI is osteoarthritis – a condition which clinicians in Dorset are frequently faced with, owing to the high numbers of older people living in the region. By producing high quality research and teaching in this area, ORI has the potential to make a real impact on local and national practice

Where we want to be?

By 2035, the pan Dorset economy will be one of the best places in the world in which to live, work, invest and play.

Brimming with optimism and fuelled by dynamic, productive businesses it will be an exemplar of a modern economy in an urban, coastal and rural landscape.

Our quality of life, exciting job opportunities and culture will attract and retain young people and families. At the same time, our integrated health system will ensure everyone who wants to work is able to do so.

Finally, as one of the most biodiverse places in England, we will be an exemplar of a sustainable economy, effectively balancing the needs of today with those of tomorrow, capitalising on our world-class natural resources and supporting nature recovery.

How will we get there?

Our approach to growth is broad based and recognises that whilst we have many opportunities to stimulate growth, we also have challenges that we need to address to create the right conditions for long term, sustainable growth. Our approach therefore recognises:

1. The urgent need **to address skills shortages**. This means taking immediate action to unlock the potential of people already living here by improving skills, health and access to opportunity.

2. The need (in the medium to long term) to **retain and attract young people** to live and work in the area to counteract our ageing demographic. This means providing a combination of:
    a. vibrant, connected places where people want to live;
    b. affordable homes; and
    c. rewarding job opportunities.

3. The opportunity to **expand our growth driving sectors** at the frontier of our economy, which have the potential to create well-paid rewarding jobs, boost economic output and compete on the international stage. But, at the same time, we must also recognise that if we want to improve our productivity and wages, we must also **improve the productivity of businesses in the foundation or everyday economy** which accounts for over 50% of employment in the area.

4. The need to shape and inform **nationally significant energy projects** to transform the economy and maximise their benefits for communities and minimise their impacts

5. That to operate effectively, our economy needs **functional transport** and **digital infrastructure**, **an energy grid** that has capacity for new connections and **places for people to work**.

6. That our **natural capital supports our economy**, providing essential eco-system services as well as making the area an attractive place for people to visit and live. Our plans for growth must not erode this asset but look to enhance our natural environment for future generations.

These imperatives form the basis of the six themes and strategic objectives that run through this strategy and are illustrated in our strategic objectives overleaf:

Area of Outstanding Natural Business

Cutting Edge Industries

Growth Driving Sectors

Stimulate, promote and support our high value clusters by:

- Establishing the area as a destination for international investment
- Stimulating inward investment and exporting
- Strengthening R&D, science and innovation investment
- Promoting strong links between businesses, research assets and supply chains
- Attracting and retaining graduates and technical skills

Growth and Opportunities

Everyday businesses

Improve the productivity, resilience and sustainability of our everyday businesses by:

- Improving technology adoption, innovation and agile thinking
- Improving access to finance
- Supporting start-ups and scale-ups
- Improving energy security and climate adaption

Empowered people

Empower all our residents to access employment and better opportunities throughout our economy by:

- Improving education and skills
- Preparing the workforce for the Energy Supercluster
- Enabling access to opportunity
- Tackling health related barriers to work and underlying causes of ill-health

Essential Foundations

Working Places

Provide the infrastructure to support growth by:

- Improving transport and digital connectivity
- Improving energy supply, security and grid capacity
- Increasing the availability of employment sites
- Developing construction skills

Vibrant Places

Champion the creation of vibrant places where people and businesses want to be by:

- Increasing the supply of homes and improving energy efficiency
- Investing in town centres
- Supporting culture
- Tackling deprivation and supporting communities

Natural Places

Maximise the potential of our natural resources by:

- Facilitating the development of the Dorset Clean Energy Supercluster and other clean energy opportunities
- Encouraging a one health approach
- Improving food security
- Providing green infrastructure to support health and well-being
- Support opportunities for integrated nature recovery and nature-based solutions

Strategic objective 1: working places

Objective: Provide the infrastructure to support growth

Why is this important?

To operate effectively, our economy needs functional transport and digital infrastructure, energy supply and an energy grid that has capacity for new connections and places for people to work:

- congestion and inadequate transport infrastructure constrain growth by:
  - reducing the distance that people are prepared to travel to work – therefore affecting the size of the labour market
  - hampering access to markets
  - affecting health
  - increasing emissions
- digital connectively plays a key role in improving productivity and addressing environmental challenges. COVID-19 demonstrated the absolute necessity to have reliable, resilient and up to date digital infrastructure
- lack of power and energy is already constraining economic development and a constrained electricity grid means that new connections (for both energy supply such as renewable projects and energy demand such as homes and businesses) can be prohibitively expensive
- insufficient employment sites mean that businesses can't expand or relocate into the area.

Which sectors will we focus on?

Whilst this objective is primarily concerned with improvements to place, rather than 'supporting sectors' per se, it will have implications for the construction sector, energy and transport and logistics sectors.

What outcomes do we want to achieve?

- Improved connectivity supports sustainable housing and employment growth
- Congestion will be reduced at key hotspots on the A31, A35, A37 and A351 enabling people to get to work
- Improved air quality and decarbonised transport system
- Residents can access walking, cycling and public transport options with more frequent bus and rail services
- People and freight will be able to travel easily to and from the midlands and the north to the south coast
- Everyone can access full fibre broadband
- Our energy grid is capable of supporting both demand and supply side opportunities (inc. the Dorset Energy Supercluster) to support economic growth
- Our growing businesses can find suitable sites and premises.

What are we building on?

	Transport • Joint work to develop a new local transport plan • Membership of Western Gateway STB
	Digital Connectivity • Project Gigabit • Smart Places programme (BCP) • 5G Rural Dorset
	Energy and Grid Capacity • Dorset Energy Supercluster project opportunities • Dorset Council Grid Capacity Review • Participation by Dorset Council in the new Local Energy Net Zero Accelerator (LENZA) tool
	Employment sites • Dorset and BCP Employment Land Study and draft local plans • Existing enterprise zone at Dorset Innovation Park • LEP Growing Places Fund

What activities will we focus on?

- **Transport** – delivering investment in our transport infrastructure to create an integrated transport system that supports our economic growth priorities, enables safer travel and supports decarbonisation of the transport system (including electrification)
- **Digital connectivity –** continuing the roll-out of full fibre connectivity, attracting an internet exchange, expanding 5G delivery and stimulating private sector investment in smart infrastructure
- **Grid capacity and energy supply –** boosting energy supply and the capacity of the electricity grid where supply/demand connections are most constrained
- **Employment sites –** bringing forward strategic employment sites across the area (see opportunities map) and maximising growth from the Dorset Innovation Park
- **Construction skills –** ensuring the sector has skills and capacity to fill the construction jobs required to take forward the pipeline of capital projects expected in the region over the next 10 years (including the Dorset Energy Supercluster)

What next?

We will:

- With the Western Gateway STB, work with National Highways to assess and deliver appropriate recommendations from the M4 to Dorset Strategic Study
- Work through the Western Gateway Strategic Transport Body to secure investment in the 12 projects identified in the draft Strategic Investment Plan (SIP)2025-2035 (see maps overleaf) as well proposals outlined for the Strategic Road Network (which are not currently included in the SIP), such as improvements to the A35 Dorchester roundabouts.
- Support expansion of Bournemouth Airport, particularly in relation to its potential as a freight hub
- Seek further investment in the Transforming Cities Fund to deliver a network of new cycle routes, walking routes and bus improvements
- Consider opportunities for transport electrification and enhancing EV charging infrastructure
- Work in partnership with the Government and private sector to improve digital connectivity including attracting an internet exchange to the South Coast
- Develop strategic and operational relationships with network operators to strengthen forecasting work, develop energy plans, co-develop innovation projects and explore opportunities from Ofgem's Strategic Innovation Fund
- Engage with proposed Regional Energy System Plans
- Co-ordinate a developer and funders forum to identify long term private (and public) finance opportunities including the development of a housing and infrastructure revolving loans fund to address viability challenges
- Develop a public-private partnership model akin to the 'Building Plymouth' concept to increase the number of people entering the wider construction sector to support the implementation of housing and infrastructure projects

And as part of our collaboration with partners in the GSW, we will:

- Work with the GSW to establish a new high level cross-departmental contact group comprising HM Treasury, the Department for Transport, the Ministry for Housing, Communities and Local Government, Highways England and Strategic Transport Bodies for the region to identify early solutions to progress the business case for the A303 scheme and wider strategic infrastructure investment into the region

STB proposals commencing between 2025 and 2030 (south)

- Capacity and facilty improvement at Bournemouth Station
- Strategic travel network (South East Dorset to BCP)
- Port of Poole Expansion, reopening of Hamworthy Branch Line and supporting access improvements
- All BCP rail stations to be made fully accessible
- Christchurch Town Centre sustainable access package
- A338 BCP sustainable access package
- Regional Cycle Network routes/schemes (BCP)
- Bournemouth Travel Interchange (bus/rail station) and links to town centre/seafront + Bournemouth Town Centre sustainable access package
- South East Dorset Rural Mobility Pilot
- Heart of Wessex rail service enhancement
- A354 multi-modal corridor improvements south of Dorchester to Weymouth and Portland.

STB proposals commencing between 2030 and 2035 (south)

- Westbury station additional platform
- Dorset Metro Shuttle (Wareham to Brockenhurst)
- Salisbury Rail Service Enhancements
- Yeovil to Salisbury Rail Service Improvement (Tisbury Loop)
- Gloucester station layout improvements
- Westerleigh rail junction upgrade
- Chippenham to Bristol rail electrification
- Henbury rail line (Metrowest phase two)
- Strategic Interchange Hubs (Gloucester, Cheltenham & Ashchurch for Tewkesbury Rail Stations)
- Four-tracking Bristol Temple Meads - Parson Street
- Long distance coach connections (Lydney-Cheltenham-Bristol)
- Rail service enhancements to existing services (WEMCA)

Strategic objective 2: vibrant places

Champion the creation of vibrant places where people and businesses want to be

Why is this important?

Vibrant places are enticing, exciting and inclusive, encouraging creativity and welcoming innovation. Whilst the Pan Dorset area is one of the most desirable places to live in the UK (as evidenced by our house prices), this desirability is making it harder for people on lower incomes to be able to live here.

Our ageing population means that we need to attract and retain young people and families to the area. As well as a good job, people want:

- an affordable home
- an attractive place to live
- a vibrant community with a good quality of life (including leisure and cultural opportunities).

The presence of a skilled workforce, will, in turn make the area more attractive to businesses, who will create good jobs.

As well as some of the most desirable places to live in the UK, the area also has extremes of deprivation, with some of our neighbourhoods amongst the most deprived in the UK.

Which sectors will we focus on?

Whilst this objective is primarily concerned with improvements to place, rather than ‘supporting sectors’ per se, it will have implications for the construction sector and the cultural and creative industries.

What outcomes do we want to achieve?

- We are able to attract and retain more young people and families
- Young people and families can afford to rent or buy homes
- We have vibrant communities with a range of leisure and cultural opportunities
- We can reduce inequalities and deprivation
- Our communities benefit from transformational projects

What are we building on?

Planning and regeneration

- Existing regeneration plans for Bournemouth, Poole and Weymouth
- Local plans in development for both local authority areas

Business community

- Business Improvement Districts in Bournemouth Town Centre, Bournemouth Coastal, Poole, Dorchester, Weymouth and Ferndown
- Dorset ambassadors network
- Presence of Rollalong, the largest offsite design and build contractor in the south of England

Partnerships

- A Cultural Compact in BCP and Cultural Strategy in Dorset Council – with shared ambitions and priorities
- A pan Dorset housing roundtable

Education and skills

- A Centre of Excellence for construction skills @ Weymouth College and construction and built environment courses at Bournemouth and Poole College
- Arts University Bournemouth - specialising in creativity
- Bournemouth University, with relevant strengths in creative industries and cultural heritage

What activities will we focus on?

- **Homes –** identifying and trialling approaches to improving:
    - the supply of homes (e.g. new models for housing delivery, stalled sites, empty homes, planning, community builds etc.)
    - the affordability/accessibility of homes for key workers, graduates and homeless people
    - the energy efficiency and sustainability of new and existing homes
- **Town Centres –** investing in our town centres to create vibrant places, which respond to the needs of our communities
- **Culture –** supporting the implementation of our cultural strategies and other activities (such as festivals, performances and events) which cultivate a sense of vibrancy and vitality
- **Deprivation –** working with partners to tackle the underlying causes of deprivation in our most deprived communities; and
- **Community –** working with our voluntary, community and social enterprise sector to support the growth and development of community enterprises as well as building community wealth through procurement, fair pay and use of land/property assets.
- **Dorset Energy Supercluster –** Ensuring potential community impacts are mitigated and benefits maximised

What next?

We will:

- Through our Housing Roundtable identify public land and assets that are suitable for housing across the public sector estate
- Co-ordinate a developer and funders forum to identify long term private (and public) finance opportunities including the development of a housing and infrastructure revolving loans fund to address viability challenges
- Develop a housing retrofit strategy and investment programme
- Work with DCMS and our cultural partners to implement our cultural strategies
- Work with VCSE sector to develop proposals for Community Wealth Building approaches.
- Co-ordinate local action to maximise the community benefits and minimise the impacts of the Dorset Clean Energy Supercluster.

And as part of our collaboration with partners in the GSW, we will:

- Work with Homes England and other industrial partners to recognise and promote housing as a means to unlock growth including exploring housing viability issues.

Strategic Objective 3: Natural

Objective: Maximise the potential for our natural resources

Why is this important?

Our high-quality environment supports our economy and wider well-being and environmental degradation would be a risk to many sectors. Agricultural policy is shifting towards the provision of ecosystem services which is likely to drive the growth of alternative farming practices (e.g. regenerative farming) and new business models, with implications for our farmers and land managers. At the same time, there is a continued demand for food production, driven by a growing population and changing climate, meaning food security will become increasingly important. We must therefore work with farmers, food producers and land managers to pioneer sustainable development approaches.

We also have a wealth of clean energy investment opportunities which could form the basis of **nationally significant clean energy cluster in Dorset**. As well as supporting the Government's clean energy mission, these projects would create high value jobs and clean growth opportunities for our residents.

Which sectors will we focus on?

Businesses in all sectors have can take action to look after the natural environment and contribute to our net zero ambitions. However, activities within this priority will have particular relevance to businesses in the following sectors:

- Clean Energy
- Conservation and environmental services
- Agriculture and aquaculture
- Agri-tech.

What outcomes do we want to achieve?

- We secure investment and jobs in the Dorset clean energy supercluster and enable wider supply chain development
- We become a net exporter of low carbon, clean energy and support wider industrial decarbonisation
- Our energy and environmental sectors become larger
- Our residents can get closer to nature and enjoy the benefits
- Our natural environment is more resilient, diverse and abundant
- Our farmers/fish-farmers are able to produce food whilst protecting the environment and making a living.

What are we building on?

	Natural Assets • Our outstanding natural environment including renewable energy resources (including offshore wind with opportunities to catalyse port development) • Geology suitable for hydrogen storage and carbon capture and storage
	Partnerships and support • Dorset Local Nature Partnership • Health and Nature Dorset (HAND) • Dorset Local Nature Recovery Strategy • SWAN – South West Aquaculture Network • South West Agritech • Future farming resilience fund • One Health Enterprise Network
	Research and education • Department of life and environmental science at Bournemouth University • Land based provision at Weymouth and Kingston Maurward College • Education and Research • Home of CEFAS

What activities will we focus on?

- **Energy Security** – developing low carbon energy opportunities including solar, onshore and offshore wind, hydrogen, carbon capture and storage and small-scale modular reactors
- **Food Security** – promoting the adoption of new/alternative farming practices and agricultural technologies to maintain food security whilst protecting the environment
- **Aquaculture** – developing the aquaculture opportunity
- **Green and blue infrastructure –** developing multi-functional green and blue infrastructure assets such as parks, woodlands, paths, streams and lakes which can deliver a wide range of benefits to people and the environment
- **Natural health –** developing nature-based activities to support health and well-being (linked to HAND) and pioneering a 'one health' approach
- **Nature based solutions –** Support opportunities for nature recovery and nature-based solutions, including the development of green finance opportunities and skills development.

What next?

We will:

- Seek Government backing for the **Dorset Clean Energy Supercluster** in its Industrial Strategy centred on nationally significant energy infrastructure projects at Portland Port.
- Engage with The Crown Estate to accelerate the proposed Round 6 offshore wind leasing round and the inclusion of sites off the Dorset Coast
- Co-ordinate local action to enable the development of Dorset Clean Energy Supercluster and maximise social value and minimise impacts. This will include key enabling activities relating to skills and labour, transport, housing etc.
- Secure investment in the delivery a multi-functional green infrastructure network, which weaves together and enriches the green and blue spaces across the region – the 'green net'[25]
- Continue to develop nature-based activities to support health and well-being through HAND as well as pioneering a 'One Health' approach to finding commercial solutions to global health challenges
- Work with Dorset Local Nature Partnership to maximise green finance opportunities and conservation skills

And as part of our collaboration with partners in the GSW, we will:

- Establish a new **Investment Skills Commission** (with Government) to develop a comprehensive workforce investment plan to meet the skills requirements of nationally significant clean energy projects in the area building on the national success of the Hinkley Point programme
- Establish a partnership between the national FLOW Taskforce and the Great South West to kick start the clean energy transition at scale
- Collaborate with Government to develop **a new, comprehensive investor offer** which maximises the global potential of the Great South West and in parallel, **pioneer a new model for green investment** that builds on the strengths of our natural capital
- Collaborate with the Department for Science, Innovation & Technology, the Department for Food & Rural Affairs and the UK Agri-tech Centre to establish **a new Agri-Tech Catapult**, located in the Great South West, reflecting the region's strategic importance to the UK's food security.

[25] BCP Green Infrastructure Strategy, May 2022

Strategic objective 4: everyday businesses

Objective: Improve the productivity, resilience and sustainability of our everyday businesses

Why is this important?

The foundation or everyday economy makes up over 50% of our employment and is essential to the functioning of all economies. However, pay, productivity and job security are often lower than average in these sectors, where a greater proportion of jobs are taken by women.

To improve our economic performance and improve the quality of life for our residents, we must also improve the productivity (and therefore wages) in our everyday economy.

Many factors affect business level productivity, including the availability of skills, workforce well-being, energy costs, technology adoption, leadership and management skills and access to finance.

Our foundation economy is also under pressure to reduce its environmental impact, develop sustainable business models and adapt to climate change.

Which sectors will we focus on?

Open to businesses in any sector, but with a focus on:

- Transport and logistics
- Retail
- Public services
- Health and social care
- Tourism, leisure and hospitality
- Farming and food production.

What outcomes do we want to achieve?

- Our foundation businesses become more productive and sustainable, offering staff better pay and more secure employment
- Our business-related carbon emissions fall, and our businesses become more resilient.

What are we building on?

Businesses in the area can already access a range of business support initiatives including:

- Support provided by Dorset LEP's Growth Hub funding including support for bid writing, horizon scanning, funding accelerator, business growth groups and digital technology
- Support provided by the Local Authorities through the current UKSPF programme such as:
    - SME grant funding
    - Low carbon Dorset and Climate essentials
- Wider support including:
    - Dorset Growth Hub
    - Dorset Trading Standards
    - Dorset Business Mentoring
    - Primary Authority Partnerships
    - Dorset Business Angels
    - Barclays Eagle Labs
    - British Business Bank (including the South West Investment Fund)
    - Business Improvement Districts (including the recently agreed Accommodation BID in BCP which will allow a tourism tax to be applied to hotel rooms)

In addition, a range of business networking organisations exist, including the Chambers of Commerce, FSB and Visit Dorset.

What activities will we focus on?

- **Technology adoption and innovation –** supporting businesses to become more productive through innovation, the use of new technologies (including digital) and agile thinking
- **Leadership and management skills** – supporting businesses and entrepreneurs with the skills needed to lead well-managed, productive and resilient businesses
- **Inclusive and healthy workplaces** – improving understanding of inclusive and healthy employment practices (including disability confident) to help address skills shortages and improve workplace productivity
- **Access finance –** supporting businesses to grow by helping them to find the right sources of finance and the skills to access it
- **Start-ups and scale-ups –** supporting potential entrepreneurs (including graduates and under-represented groups) with start-up support and supporting scale-ups to manage the growth process
- **Low carbon businesses –** providing businesses and community groups with advice to save energy, reduce emissions and improve their environmental sustainability.

Our next steps

We will:

- Work with partners to secure an integrated settlement to fund local business support to develop, strengthen and align the business support offers across the area

Strategic objective 5: empowered people

Objective: Empower our residents to access employment and better opportunities throughout our economy

Why is this important?

People are the lifeblood of our economy and drive the success of every business and sector. Equally, work can give people a sense of purpose, which can be central to their happiness and well-being.

However, businesses and employers in the area are reporting skills shortages and gaps and these are expected to increase as our workforce ages. Furthermore, the development of the Dorset Clean Energy Supercluster will create thousands of high-skilled job opportunities, which will add to demand.

At the same, approx. 25,000 people are unemployed or inactive and want to work. Similarly, a high proportion of people are working part-time (with associated lower wages) and in insecure/low paid employment, which is often detrimental to their health and well-being. There are many reasons why people do not work, or do not work more, including poor health, skills, confidence and caring responsibilities.

Poor health is one of the most significant reasons why people are not able to work and also affects the productivity of people in work. Our health is influenced by a wide range of social, economic and environmental factors and therefore, health and the economy are inextricably linked. A healthy population is essential to a healthy economy and vice-versa.

We also know that employment rates and earnings are lower amongst people with disabilities, ethnic minorities, women and people with lower skills levels. For many people, the disadvantages start before school and continue through their life. Addressing the barriers to inclusion can help us to address our skills shortages and improve individual life chances and opportunities.

Which sectors will we focus on?

All

What outcomes do we want to achieve?

- A significant uplift in the number of people in work, particularly amongst disadvantaged groups
- Dorset residents working in the Dorset Clean Energy Supercluster
- Fewer businesses reporting skills shortages and gaps
- An uplift in the number of people earning above the living wage
- An improvement in the health of our population and reduction in health inequalities.

What are we building on?

	Governance Established Pan Dorset partnerships • Dorset Skills Board • Dorset Skills Advisory Panel and Board • Dorset Local Skills Improvement Plan • Dorset Integrated Care Partnership – 'Our Dorset'
	Provision • 3 universities and 2 colleges • Pan Dorset Adult Skills and Learning • 41specialist SEND schools and post 16 providers • UKSPF provision • Dorset and Somerset Training provider network • Sector based work academies and skills bootcamps • Dorset Careers Hub and Enterprise advisor network
	Businesses • A network of 16 Cornerstone Employers who work with the Careers Hub • Disability confident employers

What activities will we focus on?

- **Skills –** activities to:
  - attract and retain talent in the area (including careers advice)
  - boost skills to meet current and future demand (e.g. apprenticeships and skills bootcamps)
  - identify and develop the pipeline of skills required to support the Dorset Clean Energy Supercluster
  - increase provision of in-work training.
- **Access to opportunity** - developing a fully integrated approach to helping people to re-engage with and progress within the labour market which:
  - addresses the underlying causes of inactivity (e.g. health, caring responsibilities, skills and confidence etc)
  - works with employers to promote inclusive, healthy and flexible working practices to support access to opportunities (e.g. through an Employer charter or Disability Confident Employer schemes)
  - pilots approaches to managing an aging workforce
  - provides access to training, an apprenticeship or help to find work for young people
- **Health** – working as an integrated partnership to develop a place-based preventative approach to health including the wider determinants of health (such as housing, environment, education, debt and money management etc.). This new approach recognises the impact that local economic development and planning policies can have on health and the opportunity to deliver more by working together. The approach will also focus on the causes of health-related inactivity (such as musculoskeletal conditions, mental health and cardio-vascular health) and the integration of employment advisors as part of treatment and care pathways.

Our next steps

We will:

- Conduct a granular analysis of the economic inactivity challenges in the area and work with our partners (including local authorities, the NHS, ICP, training providers, Job Centre Plus, the voluntary sector, employers and trade unions) to identify the actions that could be taken to get people back to work
- With our partners, develop a local '**Get Britain Working Plan'** which will:
  - shape a strong, joined-up and local work, health and skills offer
  - aim to reduce economic inactivity and take forward the Youth Guarantee within the area
  - inform and shape the development of our Connect to Work programme delivery
- From 2026/27 deliver the Connect to Work programme, a new supported employment programme for people who are economically in active
- Deliver our 'Get Britain Working Plan' utilising funding from the new Get Britain Working Fund, alongside the UKSPF and active links with local employers
- Seek trailblazer status for the pan Dorset area to become a testbed to trail new ways to manage an ageing workforce. This would involve the establishment (and resourcing of) a joint taskforce (with cross departmental representation) to research, develop and trial potential solutions
- Work with our partners in the Dorset Clean Energy Supercluster and local education providers to identify and develop the pipeline of skills required to support the development and operational phases of the Dorset Clean Energy Supercluster.

Strategic objective 6: growth driving sectors

Objective: To stimulate, promote and support our high value clusters

Why is this important?

Our growth driving sectors have higher than average productivity, undertake more innovation and are more likely to export their products and services. They also employ more graduates and people with specialist skills and pay higher than average wages.

Their productivity is enhanced by being near each other and their supply chains. This 'agglomeration or cluster effect' boosts productivity by allowing easier transfer of knowledge, skills and innovation between firms. Growth in these high value sectors will create higher paid job opportunities for our residents and help to attract and retain graduates.

The Dorset Clean Energy Supercluster projects, provide an opportunity to catapult our emerging clean energy sector into the forefront of the UK clean energy sector, transforming our economy as it does so.

Which sectors will we focus on?

Focusing on our existing and emerging high value clusters, but also recognising potential for growth from the development and application of technology across and between traditional sectors.

- Advanced Manufacturing (in particular aerospace, defence and security and marine and maritime)
- Clean energy industries
- Financial services (including Fintech)
- Digital and creative
- Health and life sciences.

What outcomes do we want to achieve?

- We become an international destination for inward investment
- Our growth driving sectors grow, creating good quality jobs for our residents
- Our universities and colleges play a stronger role in driving innovation, inward investment and technical skills.

What are we building on?

	Businesses • Existing and emerging high value clusters • Regional sectoral networks (e.g. Maritime UK South West, FinTech West, Silicon South, Dorset Engineering and Manufacturing Cluster, South West Regional Defence and Security Cluster) • International trade support through Dorset Chamber • Defence and Security Supply Chain Development programme
	Technology Strengths in the development of key enabling technologies such as: • Big data and machine learning technologies (particularly in BCP) • Internet of Things technologies • Robotic technologies
	Research and education • 3 universities and 2 FE colleges with world class centres of expertise in creative and digital technologies, health, business and engineering • Marine and Maritime Launchpad
	Places • Development opportunities aligned to our Growth Driving Sectors at Dorset Innovation Park (Battlelab), Talbot Quarter, Bournemouth Airport, our ports and town centres • Freeports in Plymouth and Solent

What activities will we focus on?

- **Strategic Inward Investment** – Securing public and private sector investment to support our portfolio of nationally significant infrastructure projects
- **Business Inward investment** – attracting inward investment from the UK or overseas into our growth driving sectors and their supply chains as well as into our universities, colleges and schools
- **Exporting** – helping business to access expert guidance, tools and services to export more products and services
- **Collaboration and supply chains** – developing opportunities to maximise collaboration and growth through resilient local supply chains. A particular focus with be on the development of supply chains to support the Dorset Clean Energy Supercluster
- **Research and innovation** – supporting R&D both within these firms, as well as the wider research base. Capitalising on research and expertise within our higher education sector to drive growth through spin-outs and knowledge transfer. A particular focus will be on **health innovation** to help tackle local health priorities to reduce inactivity due to ill-health
- **Student and graduate attraction and retention** – encouraging the brightest and the best to study and stay on here after graduation or return early in their career
- **Technical skills development –** developing bespoke programmes aligned to the skills needs of our growth driving sectors.

Our next steps

We will:

- Continue to inform and influence the Government's Industrial Strategy and sector plans
- Promote Pan Dorset opportunities through Invest in Dorset, the Dorset Ambassador Network and relevant industry events (including UK REiiF)
- With our partners, develop a clear process for attracting and landing inward investment enquiries
- Collaborate with the private sector to drive forward the energy cluster at pace
- Work with key businesses and sector leaders to develop sector-based plans to drive forward growth in these sectors, aligned with national sector plans
- Bring together a task force to understand issues relating to graduate retention, explore best practice and develop an action plan to encourage the brightest and the best to stay here
- Through our Dorset Skills Board, identify the technical skills required to support the growth of our growth driving sectors and develop bespoke skills development programmes.

And as part of our collaboration with partners in the GSW, we will:

- Collaborate with Government to develop **a new, comprehensive investor offer** which maximises the global potential of the Great South West
- Develop a new place-based model of collaboration with UKRI through an ambitious **Joint Investment Plan to scale up investment into the region's research and innovation ecosystem**, to turbo charge development and adoption of world leading science and technologies across the area
- Strengthen collaboration between the South West Defence & Security Cluster, Ministry of Defence and Department for Business & Trade through **a new concordat to accelerate technology investment**, workforce planning, and market growth. This would be a key building block of the Strategic Defence Review, cementing GSW as the UK's defence spine
- Work with Make UK, industry leaders and the Department of Business & Trade to shape **a new Joint Manufacturing Investment Plan for the Great South West**, recognising its national importance to trade and exports and anchoring the region at the heart of the Government's new Industrial Strategy for the UK.

Appendix 1: Measures of success

	Ambitions (over the life of the framework)	Key indicator	Source
Output & productivity	• Reduce the gap in the rate of output growth between Dorset and the UK average • Improve productivity so that the area moves from the 'falling behind' group to the 'catching up group' of local authorities	• Total economic output (GVA) • GVA per hour worked	ONS
Economic activity	• Increase the economic activity rate to 80% • Maintain/increase the total size of the workforce in the area in the face of ageing population pressures	• Economic activity rate for people aged 16-64 • Total number economically active people aged 16+	ONS
Wages	• Reduce the pay gap between workers in the area and workers in the rest of the UK • Reduce the number of people earning less than the Living Wage	• Gross weekly pay for full time employees (workplace) • The proportion of employee jobs with hourly pay below the Living Wage	ONS ONS
Skills	• Close the gap in the proportion of people with higher level skills between the Dorset area and the rest of the UK	• % of the residents (aged 16-64) with Level 4+ qualifications	ONS
Housing	• Reduce the gap in housing affordability between the Pan Dorset area and the rest of the South West	• Ratio of median house price to median gross annual workplace earnings • Ratio of lower quartile house prices to lower quartile annual workplace earnings • Median monthly rents	ONS
Inequality	• Reduce levels of deprivation in our most deprived areas	• No of LSOAs in the 10% most deprived areas in England	ONS MHCLG
Health	• Improve the health of our population • Reduce health inequalities	• Under 75 mortality rate from all causes • Inequality in life expectancy at birth between the most and least deprived areas	Fingertips public health data
Climate Change	• Achieve net zero by 2050 (2045 in the DC area)	• Total Greenhouse gas emissions	Department for Energy Security and Net Zero
Bio-diversity	• 30% of land in positive managem • ent for nature	• Proportion of land in positive management for nature	

DORSET
Local Enterprise Partnership

The papers for agenda Item 3.3 are not included as they are Commercially Sensitive

Local Enterprise Partnership

DORSET LEP BOARD MEETING COVER SHEET

Meeting Date	28-01-25	**Item Number**	4.1
Security Level:	**Confidential** ☐	**Commercially Sensitive** ☐	**Unclassified** ☒
Paper Title	Dorset LEP Business update		
Recommendation	None – for information only		
Papers are provided for:	**Decision** ☐	**Discussion** ☐	**Information** ☒

1. PURPOSE

To brief the Board on delivery, activities and developments related to business growth and inward investment within Dorset LEP.

This report supports Dorset LEPs strategic objective for business growth and attracting inward investment to increase employment opportunity and raise productivity of businesses across the region.

2. SUMMARY

Growth Hub Delivery 24/25

All programmes are live and are on track to deliver to defined output targets by end March:

Health & Social Care Sector Innovation & Supply Chain
A programme of events to help Dorset companies identify innovation and supply chain opportunities within Health & Social Care sector across the SW region and beyond. Events to cover awareness of the sector, opportunities, introductions, networking and innovation funding resulting in 100 interventions.

Defence & Security Sector Supply Chain
A programme of events to help Dorset companies identify new opportunities within their Advanced Engineering & Manufacturing, Digital Creative and Marine & Maritime business that would benefit the Defence & Security Supply Chain across the SW region and beyond. Events cover awareness of the sector, opportunities, introductions, networking and funding for Defence & Security sector resulting in 100 interventions.

Digital Technology for Productivity Programme
A programme of specialist-led digital tech, productivity and innovation advice and support for 25 businesses (12 hours). This programme is aimed at SME manufacturers in Dorset and is providing organisations with an internationally recognised benchmark assessment which includes a suite of frameworks and tools to help start, scale and sustain manufacturing transformation.

Bid Writing Support (to encompass 3 elements)
Horizon Scanning Service - helping businesses identify potential funding sources via private investors, angel investor groups, SWIF, government grants e.g. Innovate UK, DCMS etc.

Bid Writing Support - providing support to businesses who have identified a grant they wish to apply for. This has been utilised for Marine and Maritime Launchpad Round 2 and businesses in Dorset & BCP are expected to have been successful this time.

Bid Writing Masterclasses – delivery of masterclasses to write compelling bids for Innovate UK and other Government funding. 2 of these were specifically for Marine and Maritime Launchpad.

Business Growth Groups
A peer support programme for 40 businesses to identify, plan, and implement business growth and productivity actions. 4 sessions per group, 15 hours of support per business. This programme has a focus on Advanced Engineering & Manufacturing, Marine & Maritime, Digital Creative and Visitor Economy established Dorset businesses with growth potential.

Funding and Investment Readiness
A programme of support to help businesses to ensure they have everything in place to successfully apply for investment from private and government sources investors, angel investor groups, SWIF, Innovate UK, grants etc including finance information, pitch decks etc. Two sessions to focus on start-up funding and two sessions on growth / scale-up funding with one business from each session hand-selected for additional one-to-one financial support. This will result in a minimum of 40 interventions.

Funding Accelerator
A part-funded programme of support helping 10 businesses to demystify the investment process, break down barriers and create a level playing field. This programme provides businesses with the tools and techniques they need to encourage investors to back the business. The programme includes three "sprint" sessions, one-to-one support and pitch practice and feedback. 12+ hours of support for each business.

These programmes are in addition to the **business signposting service**, **CRM management** and **DBT reporting** (monthly, bi-annual and annual).

The **DLEP Business LinkedIn page** is very active with 1572 followers as of 15 January (up from 1559 in November).

Growth Hub Delivery 25/26 & beyond

The Growth Hub delivery team (1.5 FTE) is transferring to Dorset Council on 1st April 2025. Growth Hub funding has been promised however the amount of funding is yet to be confirmed. There are many activities that are required to take place prior to the transfer to ensure a seamless transition and continued access to business support. Operational planning with both councils is underway.

Other Activity

Inward Investment – www.investindorset.com continues to be updated with additional content including business case studies. Next steps are to create a page for specific inward investment opportunities in Dorset.

Working with DBT partners, BCP Council and Dorset Council the team work to share resource and provide an effective support service for inward investors under the Invest In Dorset (IID) brand.

Dorset LEP led on the review and updates to DBT Propositions to ensure representation for Dorset.

Innovate UK Marine and Maritime Launchpad – Dorset LEP have worked closely with Innovate UK, Maritime UK SW and GSW teams to deliver Round 2 of this high-profile funding opportunity - £7.5m pot for projects related to Clean Maritime, Digital Oceans and Marine Autonomy. Dorset LEP were the only organisation to hold events specific to Dorset businesses to highlight the opportunity with relevant businesses. Round 2 is now closed with applicants informed of outcomes in Nov. Two Dorset businesses are now going though the due diligence process with Innovate UK to receive funding. **(NB this information must remain confidential).** In comparison Round 1 received 5 Dorset-led bids with 0 funded.

British Business Bank – A sector-specific event is planned for Q1 2025 as well as planning additional Meet the Funder sessions in West Dorset and North Dorset.

Fintech West South Coast Hub – the hub continues to grow with the next event planned for February. Dorset LEP has sponsored the Fintech Ecosystem Report for Dorset which is due in Q1.

Local Nature Recovery Strategy – Dorset LEP is the representative for and link to business on the steering group for this initiative led by Dorset Council. The strategy is in the process of being finalised and signed off with the next step being implementation across the county.

Dorset Ambassadors – the next event takes place in Feb 2025 at Hall & Woodhouse Brewery.

South West Investment Fund – DLEP continue to promote this £200 million fund for the South West region.

GSW – we continue to work closely with the GSW team on several initiatives including the upcoming Made Smarter Programme (25/26), Internationalisation Programme Board, Manufacturing Investment Plan, Marine & Maritime Launchpad.

UK SPF – BCP Council and Dorset Council UK SPF Programmes continue and are very popular; Dorset LEP regularly refer to these schemes and businesses are referred onto DLEP funded programmes.

Future Farming Resilience – this programme led by Devon County Council and Business Information Point providing support for farmers across Dorset is now complete and the final report for Dorset submitted to the programme lead.

Clusters / Programmes – Dorset LEP continue to play an active role in several clusters / programmes including South West Regional Defence & Security Cluster, Maritime UK South West, Tech South West, South West Agri-Tech, South West Aquaculture Network.

South West Agritech Showcase – the next annual event is taking place in March 2025.

3. RECOMMENDATION

None – for information only

DORSET LEP BOARD MEETING

Meeting Date	28 January 2025	Item Number	4.2
Security Level:	**Confidential ☐**	**Commercially Sensitive ☐**	**Unclassified ☒**
Paper Title	Dorset LEP Skills Update		
Recommendation	None – for information only		
Papers are provided for:	**Decision ☐**	**Discussion ☐**	**Information ☒**

1. PURPOSE

This paper provides an update from the Dorset Skills Board (DSB) together with operational updates on the contracted LEP skills delivery.

2. DORSET CAREERS HUB CONTRACT UPDATE

The Dorset Careers Hub is delivering strongly with a range of events supporting the delivery of excellent performance:

Current performance tracking:

- 97% School Compass return
- 80% schools have upgraded to Compass +
- 55 employer advisors available for schools with 66.7% matched with 6.2% agile
- 93.8 % (75 schools) achieving floor targets
- 94% achieving 3 benchmarks (target 92%)
- 40% achieving all 8 benchmarks (target 23%)
- Dorset Careers Hub are in the top two quartiles for achievement in 6/8 benchmarks
- Met specific targets relating to Benchmark 5 (encounters with employers)
- Quartile 1-2 for six benchmarks

Some highlights of delivery:

Teacher Encounters – excellent series of events taking teachers into the workplace. The programme has been oversubscribed, and we are now delivering a wave 2 of these valuable experiences.

WorkEx Directory – in partnership with the Chamber, we have created a directory providing work experience opportunities for young people. This went live to schools Jan 25.

Posters for schools – a new series of sector-based posters have been produced for use in schools.

Future events:

- People Festival School SLT Breakfast
- Future Pathways: Supporting young people with recruitment processes
- North Dorset Careers Fair
- Festival of Careers and Skills

- SEND Transitions fair
- SEND Forum
- Careers and Apprenticeship Show, BCP

3. DIGITAL SKILLS HUB CONTRACT UPDATE

The hub continues to deliver strongly in Boscombe. Directly linked to Kaddi's finalist in Young Digital Leader 100 we have successfully secured two research projects working with those in digital poverty to understand service changes.

The programme of skills delivery continues to meet the KPI's, but more importantly delivers for the individuals and businesses that need support. The Business Masterclass in January on Marketing for new businesses attracted 20 people, our range of teatime Tech Talks is drawing interest from residents and businesses and the pizza orders are increasing. As part of the LEP delivery, the We Are Boscombe social media feed is making an impact for businesses.

The KPI update was 31 December 2024. The project is delivering to budget as set in the contract with BCP. The latest KPI's reported were:

Project Deliverables	Target: 2021-2026	Achieved to date (as at 30/09/24):
# of full-time equivalent (FTE) permanent jobs created through the project	2	1.4
# of full-time equivalent (FTE) permanent jobs safeguarded through the project	1	0.5
# of potential entrepreneurs assisted to be enterprise ready	114	102
# of enterprises receiving non-financial support	393	1337
Number of closer collaborations with employers	165	157
Number of customers/ businesses using the Hub *(includes community use)	10281	8049 (plus 25,000 business engagements on social media and 1000 followers)
Number of qualified new learners in new courses (shared with virtual skills app)	640	411
Number of referrals to existing courses and facilities (shared with virtual skills app)	8884	4518
Number of new learners enrolled on existing courses and facilities (shared with virtual skills app)_	1500	533

In line with the paper from Dorset and BCP Councils, the LEP received notice from BCP Council on the 20/1/25 withdrawing the contract from the LEP effective the 31/3/25. The letter states that 'the Services under the Contract will be continued by BCP Council, in house.' The LEP will work with BCP, where possible, to enable the transfer.

4. DORSET SKILLS BOARD

Dorset Skills Board will meet on 27th January so this update will be verbal.

5. RECOMMENDATION

None – for information only.

DRAFT MINUTES

DORSET LOCAL ENTERPRISE PARTNERSHIP BOARD

28 NOVEMBER 2024 FROM 10.00 AM TO 11.40 AM

VIRTUAL TEAMS MEETING

MINUTES

Board Attendees:

Cecilia Bufton (CB) (Chair)
Ian Girling (IG)
Keith Phalp (KP)
Nick Gaines (NG)
Cllr Richard Biggs (RB)
Selina White (SW)
Cllr Simon Clifford (SC)

Also Present:

Aidan Dunn (AD) (Dorset Council)
Chris Shepherd (BCP Council)
Kathryn Hill (KH) (Dorset LEP)
Rebecca Davies (RD) (Dorset LEP)
Vinita Nawathe (VN) (Dorset LEP)

Apologies:

Cllr Millie Earl (ME)
Nicola Newman (NN)
Neil Skelland (NS)
Paul Gough (PG)
Phil Sayles (PS)

DRAFT MINUTES

Item	Notes and Decisions	Action
1.	Apologies were received for: Cllr Millie Earl, Neil Skelland, Nicola Newman, Paul Gough and Phil Sayles. Declarations of Interest: no declarations of interest were declared.	
2.	**Chair's Update** CB updated that the work of the Great South West has been continuing. The second GSW Westminster event was held on Monday 11th November focusing on energy security and the launch of the refreshed Energy Prospectus. Among the speakers at the event was Lord Hunt, Minister of State for Energy Security, and Tom Hayes MP, the newly appointed missions champion for clean energy. CB mentioned that the recent budget stated Government are minded not to fund PRP's going forward and if anyone was minded to write to Government in support of the Great South West it would be a good thing to do. CB updated on OneHealth and that there have been four challenge panels held over the last few weeks, each one with a different company. Each of those companies received great advice from the panel participants from Bournemouth University, Arts University Bournemouth, University of Southampton, Innovate UK and the LEP Chair, as well as advice on funding. These reports will be circulated soon. CB mentioned the Getting Back to Work White Paper and that this was an something we could be considering	
3.	**CIC Business**	
3.1	**LEP Functions Integration** VN spoke to the paper and a discussion took place.	
3.2	**Dorset LEP Skills Report** RD explained that the Skills paper is mainly looking at the Digital Skills Hub and the Careers Hub. RD pointed out that the National Report, produced this week, on apprenticeships and education features Dorset and that the Careers and Enterprise Company (CEC) have been making a difference. DLEP have received an award of £120,000 in the last few weeks to deliver a Work Experience feasibility project and will be working with the CEC to deliver work experience for those who find it difficult to secure a placement. We will work with over 20 schools from now until the end of July and hope to bring in more businesses and make schools aware of how they can link into businesses. We recently had a very good teachers encounter, visiting the Lighthouse where they were able to look at all aspects of the Lighthouse business. RD mentioned that the Digital Skills Hub is still working with asylum seekers and continues to be very busy on Community Tuesdays. RD described working with the NHS ICB looking at employability, linked to the More and Different programme, with mini interviews planned on the day, along with workshops	

Item	Notes and Decisions	Action
3.2	**Dorset LEP Skills Report Cont'd** and wellbeing support to help people with next steps. If this day is successful in January, we will look at how to replicate it in the west of the county. RB said he thought the Teachers Encounter project was really interesting, taking teachers to businesses and wondered why the Lighthouse. RD explained that we are doing six different sectors and the Lighthouse was about the digital business sector but it is also covered hospitality and is a charity. The approach this year is think about the subjects in schools and then think how they are used in different parts of the business. up so teachers can experience the full range. SW agreed this is a great initiative and mentioned how to raise the view of housing and all the different types of roles that they offer. She said they are on site in Portland at the moment and working with Weymouth College. She offered to be a business to visit and can also connect with other housing businesses across the region if needed. CB wanted to note the Board's congratulations to the Careers Hub Team for all the good work they are doing. RD mentioned that the Skills Board met in September and they started a discussion about what will happen with the Board in the future. Everyone around the table was keen for it to continue. There is a meeting in January and they will need to make a decision on how to take that forward.	
3.3	**Dorset LEP Business Report** RD spoke to the Business update. She was pleased to confirm that the Chancellor, in the budget, had confirmed that Growth Hubs will continue. She said the report shows all the programmes that we are currently running and that we have added an extra one in the last couple of months. The Health & Social Care Innovation and Supply Chain work was tendered and supported. We are looking at how we bring more businesses into the supply chain and bring in more resilience into that area. SCT is making developing plans for how we deliver this for next year and will work with our local authority partners on how we take this forward from April 2025. We recently held a "Meet the Funder" event in October which has been very well received and we are hoping to do more in January/March. We received very positive feedback from funders who confirmed that they met businesses that they had not spoken to before. CB said she has received feedback from businesses saying how great it was to have all the funders in the room. CB noted the Board's thanks to SCT for all her hard work.	

DRAFT MINUTES

Item	Notes and Decisions	Action
4.	**For Noting**	
4.1	**Executive Director's Update** VN mentioned that she submitted a response into Government on the industrial strategy. She explained that this is a green paper and asking about methodology. What comes next will be interesting. She said we have encouraged the projects around Portland to put in a response and both Dorset Council and BCP Council also put in a response. CB stated that one of the benefits of working as part of the GSW is the MP engagement via the APPG for the South West, as this keeps the information flowing into Westminster.	
4.2	**Board Member Updates** CB stated that the Get Britian Working white paper is interesting, as there may be some funding linked to it. There could be an opportunity to bring money into the area and asked is that something we want to bring back to the January meeting. **Action: RD to a look at the White Paper and bring any suggestions back to the January Board meeting.** CS mentioned he was working with the Connect to Work programme. He had been part of a meeting earlier on in the week on how BCP Council work with Skills and Learning on being a joint partnership. **Action: CS to work with RD to work out whether this is the same as the Get Britain Working or in addition to it and bring something back to the January Board meeting.** CB asked the Board if they had received any feedback on the impact of national insurance rise for small businesses. CS said he had not heard anything formally, nobody had written in to BCP Council about it, but they knew there was going to be an impact for the Council related to the suppliers supplying them with critical services, like passenger transport services. Those services will be difficult to run with these additional costs. IG updated that there is a lot of negative feeling from the business community around the legislation changes. The NI increases have been received terribly from the business community and there are huge concerns businesses will stop recruitment, cut their workforce and stop investment. He informed that the Chamber has put out a survey in the last couple of days and received 65 responses already. He said they know of one business facing a wage increase of over £100,000. He has written to all the town chambers in Dorset asking them to distribute the survey to their members, so they can gather the information to submit to the Dorset MPs. He also informed that the sexual harassment legislation has kicked in already and they think this has been missed, so they will be putting out information on this.	 RD CS/RD

DRAFT MINUTES

Item	Notes and Decisions	Action
	Board Member Updates Cont'd CB mentioned that the charity sector is also concerned about the impact. SC informed that Dorset Council are having to make provision for increases from suppliers. He also said that with charities, you cannot pass costs on to customers, so they will have to let paid employees go. SC went on to update on devolution. He said that they have submitted their expression of interest with Somerset and Wiltshire and have updated it to include a mayor. They decided it was pointless to continue without having a mayor as it is clear that no mayor, no money.	
5.	**Minutes from the Last Meeting**	
	The Minutes were agreed as an accurate reflection of the last meeting. There were no matters arising.	
6.	**Any Other Business**	
	RD asked whether board members could ensure that any comms relating to LEP future and especially in relation to staff changes wait until the completion of the staff process (week commencing 17 December). She suggested anyone wishing to share comms follows the LEP lead.	

Note: Date of Next Meeting - 28 January 2025 at 1.30 pm