Pan Dorset –
A Framework for Growth
Consultation Document

September 2024

Executive summary

Introduction

This framework for growth sets out 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 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 benefit from several high value sectors, where we have a clear comparative advantage and can compete in international markets. These include:

- **advanced engineering and manufacturing** (with a particular focus on marine/maritime, aerospace, defence and security)
- **finance and insurance** (including Fintech)
- **digital and creative**
- **health sciences**

But 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 high value 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 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 **bio-diversity and landscape character**, with 52% of the landscape designated as a National Landscape. Our towns, coast and countryside support a visitor economy which attracts almost 24 million visitors a year who spend over £1,6m 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.**

We have considerable **untapped energy resources** which could generate enough clean energy for us to become an **energy exporter**. Our unique geology means we have potential to **lead the UK's hydrogen economy** through development of the **UK's largest hydrogen storage site**. Similarly, **floating offshore wind** presents opportunities for our ports and our long-standing relationship with nuclear energy at Winfrith provides possibilities for **small scale modular nuclear reactors (SMRs)**. However, our **constrained electricity grid** is a potential drag on growth.

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 LEP 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 reasons affecting the housing 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.

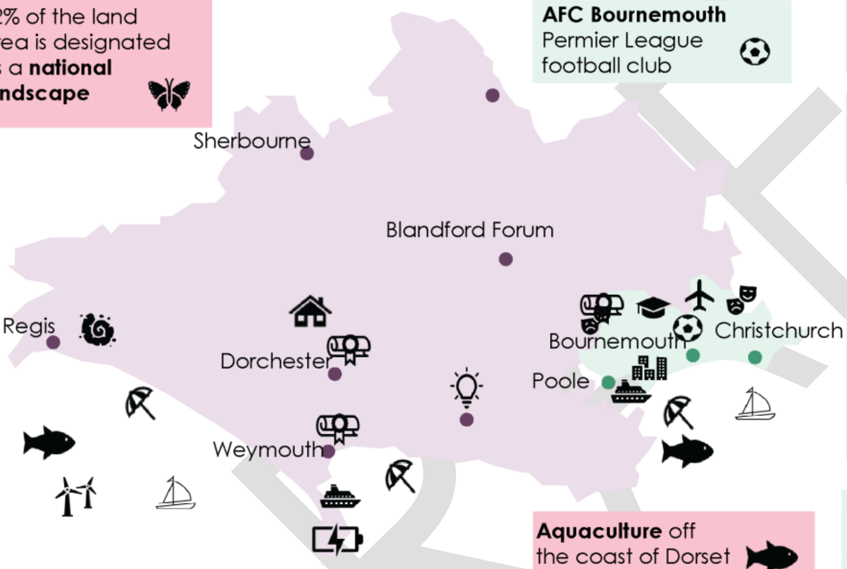
Our opportunity map

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

3 universities with 7,500 graduates each year

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**

14 Blue flag beaches

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

Port of Portland - Sheltered deep water port, perfectly positioned to support offshore renewables

Portwind Offshore Wind Farm - a 2GW project which would power 3m households

Hydrogen Storage in salt caverns on the Isle of Portland

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 amongt 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

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

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 bio-diverse 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 **grow our world class, high value 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.

4. 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.

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. And finally, recognising 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.

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

Frontier businesses

Stimulate, promote and support our high value clusters by:

- 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
- Decarbonising business

Empowered people

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

- Improving education and skills
- 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 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:

- Developing low carbon and renewable energy opportunities
- Encouraging a one health approach
- Improving food security
- Providing green infrastructure to support health and well-being

1. Introduction

Why are we producing a new economic framework now?

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

Purpose

The purpose of this document is threefold:

- 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 achieve it
- to communicate our collective ambitions to stakeholders beyond the area and 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)
- to identify investment priorities for the area which will help us to lay the groundwork for future funding bids and a potential devolution deal with Government if there is the appetite to pursue one.

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:

- 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 the 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 to 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 first steps in this process have been to:

- conduct a full review of the economic data and trends affecting our area, this is provided in Appendix One
- conduct 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.

This work has informed discussions with the LEP board and partners *which* has helped to shape the vision and priorities set out in this document.

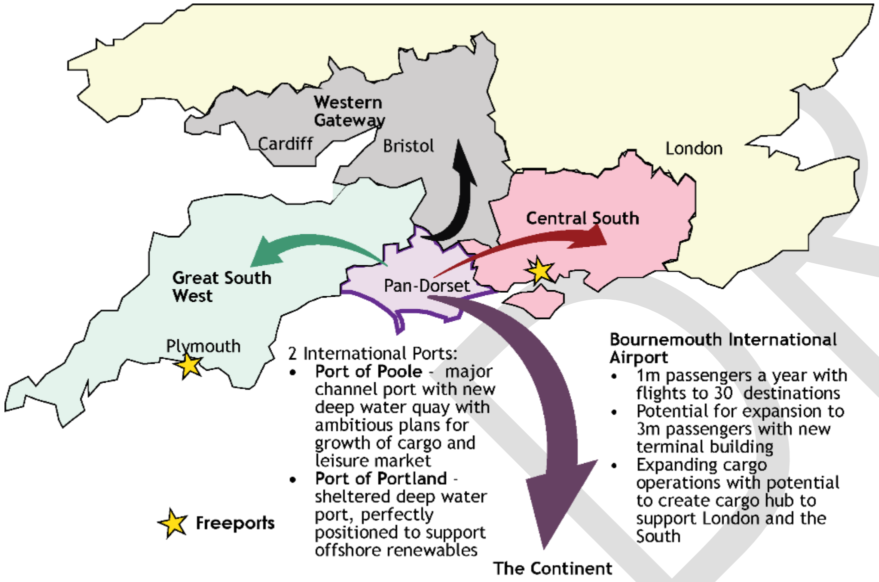
This version is currently a draft to support a process of consultation and engagement through the autumn.

2.The pan-Dorset Economy today

2.1 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.



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

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 an **outstanding natural environment** in the DC area which has opportunities to develop nationally significant **low carbon energy projects,** which pave the way for clean growth. This diversity of places is one of our greatest strengths.

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.

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

High value sectors where we have a clear comparative advantage

The pan-Dorset area has a number of high value sectors where we have a clear comparative advantage. There 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**)
- **finance and insurance (including Fintech)**.

In addition, our emerging **digital and creative** sector benefits from our rich cultural heritage, our investment in smart technologies and the international reputations of both Bournemouth University and the Arts University Bournemouth 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 following case study illustrates.

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.

More information about each of these opportunities can be found in section 3.

Key Enabling Tech (KET)

Research into the number of businesses developing or adopting key enabling technologies in the area conducted as part of the Great South West Integrated Economic Review found a total of 601 businesses either developing or adopting KETs (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.

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.

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.** This is an area of untapped potential that our plan seeks to address.

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

[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

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.

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 £1,6m 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, 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

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

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 (1,129km^2 covered by the Dorset National Landscape and 278km^2 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 provides the foundation on which much of our economy is built as well as supporting our health and well-being.

Untapped energy resources

We have the potential for a clean energy revolution in the pan Dorset area, with untapped resources which could generate enough clean energy for us to become an **energy exporter**. Our unique geology means that we already host western **Europe's largest onshore oil field** at Wytch Farm and have the potential to lead the **UK's Hydrogen Economy** through the development of the UK's largest Hydrogen Storage site.

Case Study: Hydrogen Storage

UK Energy Storage is developing plans to build the UK's largest Hydrogen Storage site at Portland Port. The site will provide up to 2bn cubic metres capacity and would double the UK's existing underground storage. Energy storage is a critical component of any energy network. Large-scale storage helps balance winter and other shorter term peak energy demands and provides insurance against critical supply disruption such as the War in Ukraine or extreme weather events.

The storage facility would be built approx. 1.5 miles below ground in salt caverns, which provide ideal conditions for the storage of Hydrogen, but only exist in a handful of locations in the UK. As well as its geological location, the site is ideally positioned in relation to energy demand (from industry and population centres in the South East) and energy supply from Hinkley and new offshore wind.

Alongside Hydrogen Storage, **floating offshore wind** (both off the coast of Dorset and the Celtic Sea) present opportunities for our ports, as part of a wider Great South West opportunity.

Finally, our long-standing relationship with nuclear energy at Winfrith provides possibilities for **small scale modular nuclear reactors** (SMRs).

However, our **constrained electricity grid** means that new connections (for both generation and demand) can incur high costs and make developments unviable.

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**. 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)

Cefas operates as an Executive Agency of Defra - the UK Government's Department of 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. It also leverages breakthroughs in genomics and artificial intelligence to drive innovation and understanding.

Recognising the vital role of science, 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.

2.3 Our Opportunity Map

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

3 universities with 7,500 graduates each year

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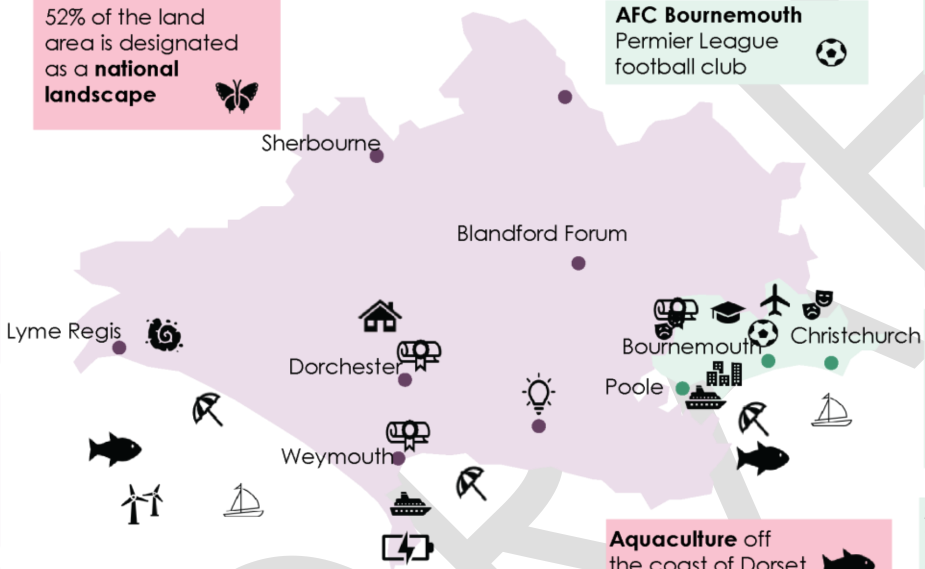


National **Sailing Academy** Weymouth

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**

14 Blue flag beaches

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

Port of Portland - Sheltered deep water port, perfectly positioned to support offshore renewables

Portwind Offshore Wind Farm - a 2GW project which would power 3m households

Hydrogen Storage in salt caverns on the Isle of Portland

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 amongt 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

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

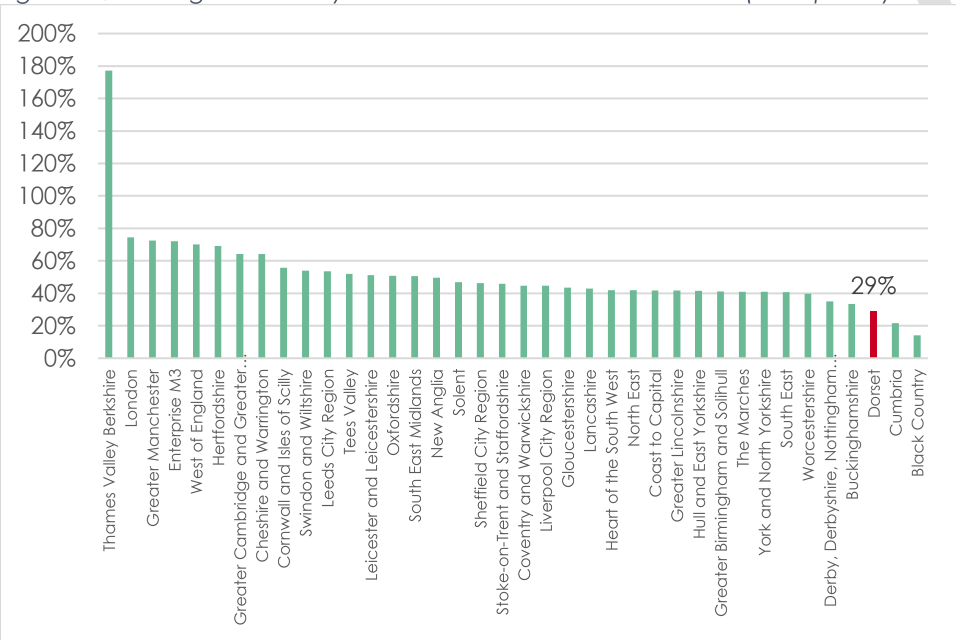
2.4 Challenges

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 LEP 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)

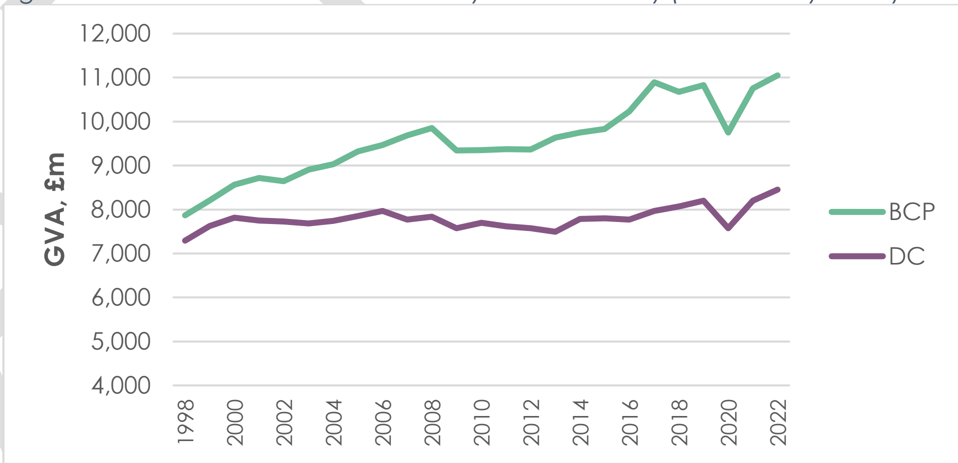


Source: ONS, Regional Gross Value Added (balanced) by industry: City and Enterprise Regions

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

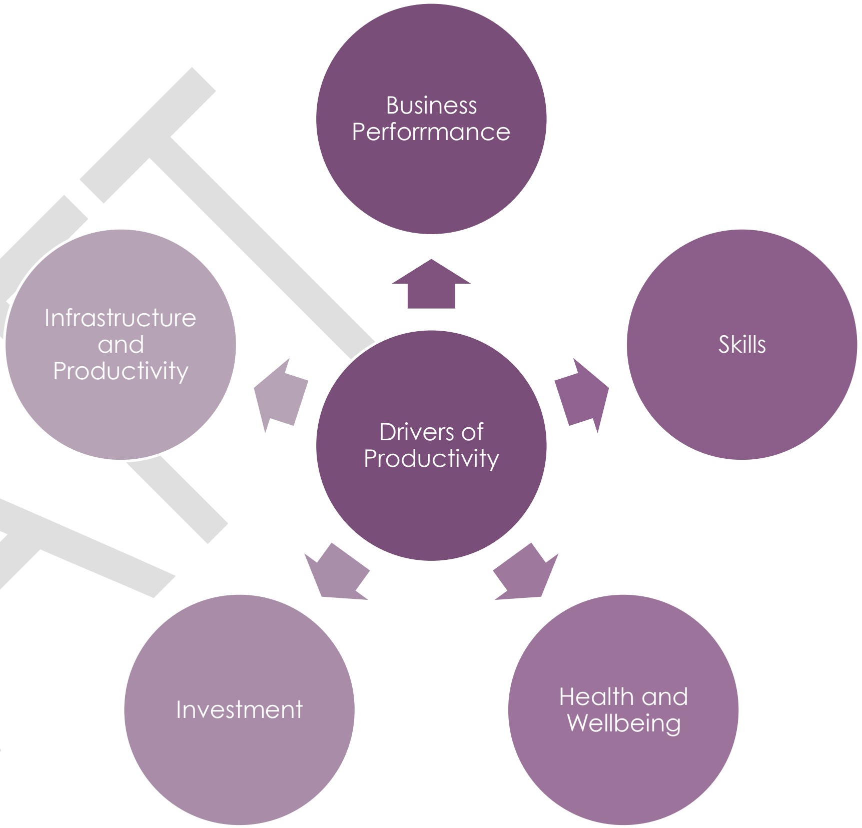
Productivity in 2021 was £33.7 per hour worked, compared to £38.33 per hour for the UK (£34.8 for BCP and £32.4 for DC). This **£4.63/hour gap equates to an output gap of £2.68bn a year.** Furthermore, analysis by the Productivity Institute categorised UK sub-regions into four groups:

- 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 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 remains the subject of intense debate, however, at a regional level, key drivers of productivity include:



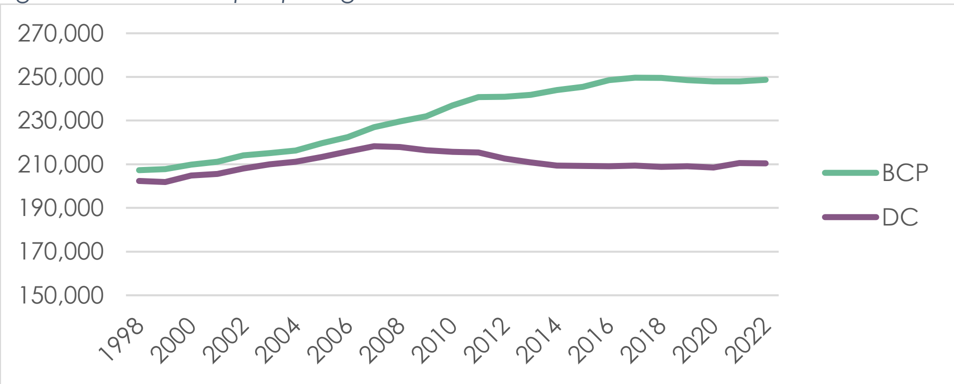
Source: Productivity Institute

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 workers 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



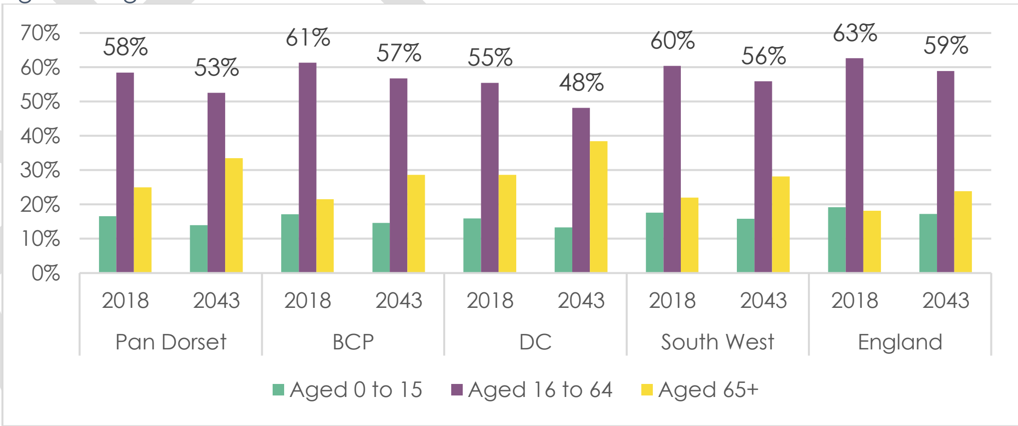
Source: ONS Mid-year population estimates

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 and 56%. 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

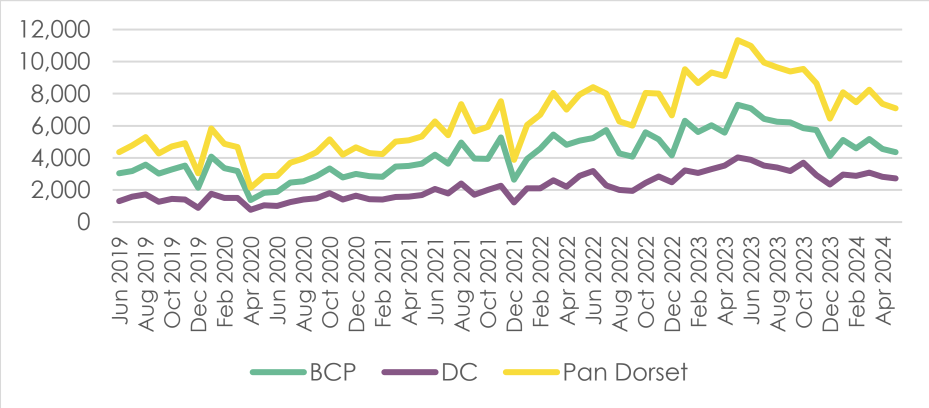
Fewer people of working age will mean that the area will have **less people to fill jobs in all parts of our economy and existing labour market shortages will become even more extreme**. Therefore, maximising participation in the labour market will be a key priority for us.

[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 or 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 continue 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

[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

key opportunity to improve the health, wealth and well-being of our residents.

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]

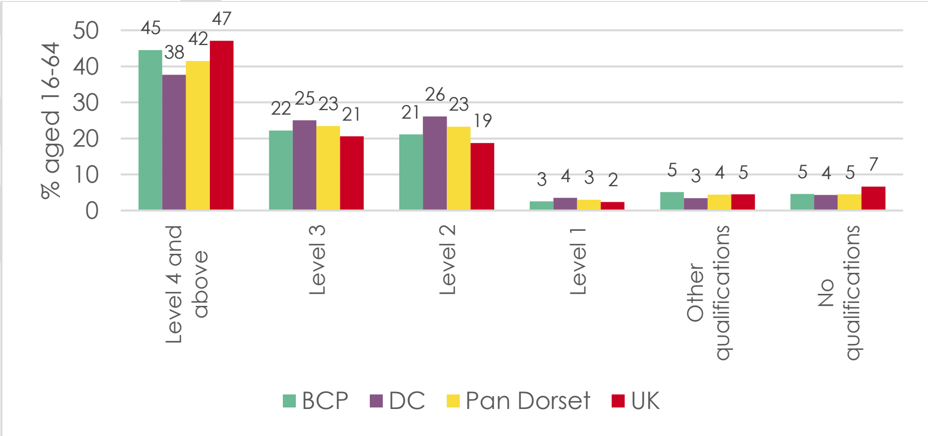
High levels of part-time work

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)

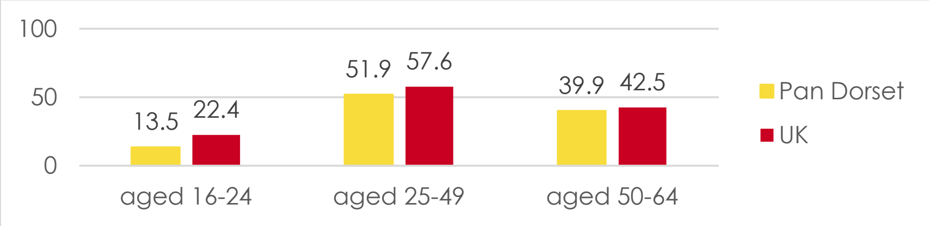


Source: Annual Population Survey, ONS

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.

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

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

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

[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

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.

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 the xx sites across the area with planning permission for 20,000 homes are built out.[21]

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

[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

[21] Source to be confirmed

- 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.[22] **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

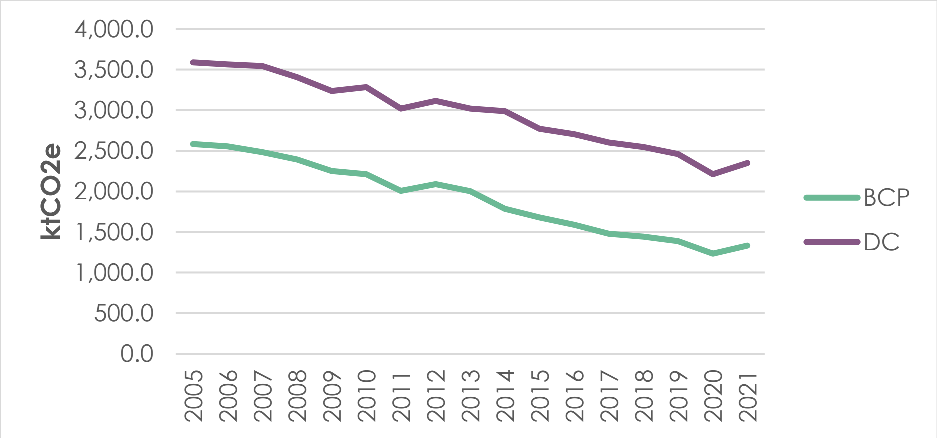
Both Dorset Council and BCP Council have **declared climate and ecological emergencies** and have set out ambitions for the area to be carbon neutral by 2050 or earlier. Figure 9 shows that between 2005 and 2021 greenhouse gas emissions reduced by 40.3% across the Pan Dorset area (48% in BCP and 35% in DC).

Whilst responding to this global issue is undoubtedly one of the biggest challenges we face, it **also provides an opportunity** to make our food and energy systems more secure, our homes and transport systems healthier and cheaper to run and to create skilled jobs and industries. 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[23].

[22] Source: Connected Nations, Summer 2023

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

Figure 9: Total Greenhouse gas emissions between 2005 and 2021



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

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.

Dorset LEP works in partnership, recognising that interdisciplinary collaboration - between business, government, academia, third sector, finance, and the broad spectrum of innovation agencies - is needed to find solutions to the problems affecting our health and the health of the planet. 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).

3. Our existing and emerging high value clusters

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

3.1 Advanced Engineering and Manufacturing

The pan Dorset area is a thriving hub for Advanced Engineering and Manufacturing. With major primes and their supply chains already flourishing we offer a fertile ground for expansion and partnerships. Supported by the Dorset Engineering and Manufacturing Cluster group, the sector benefits from a range of R&D assets including:

- 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, the South West's "Catapult Centre" located at Bristol & Bath Science Park and Satellite Applications Catapult.

Key manufacturing specialisms include:

- Aerospace
- Defence and security
- Marine and maritime.

Although it should be noted that these clusters extend far beyond manufacturing, with businesses providing consultancy services as well as digital and creative outputs.

Marine and Maritime

	Marine and Maritime
Nature of specialism	Dorset is a leading force in clean propulsion, security and yacht manufacturing
Key places	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 floating offshore wind through Portland Harbour
Leading businesses	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
Networks & regional connections	Maritime UK South West and the British Marine Federation Links to Great SW and Central South

Defence and Security

	Defence and Security
Nature of specialism	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
Key places	• Dorset Innovation Park (secure). • Home to the Defence BattleLab a co-creation space which fosters open and collaborative development of technology
Leading businesses	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
Networks & regional connections	South West Defence and Security Cluster Links to GSW, Western Gateway and Central South

Aerospace

	Aerospace
Nature of specialism	Dorset is a leading hub for Aerospace Maintenance, Repair and Overhaul (MRO), which is expected to grow by 4.1% per annum
Key places	Bournemouth Airport and Aviation Business Park • A centre of excellence in aviation/aerospace manufacturing • Where airport expansion offers the opportunity to create the UK's newest cargo hub to serve London and the South East
Leading businesses	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
Networks & regional connections	• West of England Aerospace Forum • Part of the South West Aerospace cluster which is one the largest and most significant in the world. It benefits from 14 top prime companies and over 800 supply chain companies • Links to GSW, Western Gateway and Central South

3.2 Financial Services (including Fintech)

	Financial Services
Nature of specialism	BCP hosts 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
Key places	The Lansdowne district of Bournemouth is a key financial centre, where there is new energy efficient Grade A office accommodation and opportunities to develop more
Leading businesses	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
Networks & regional connections	• Part of Fintech West, through its new South Coast Hub • Links to Western Gateway • Links to Central South
R&D and skills	• Technical qualifications through BCP College and Weymouth College • Bournemouth University Business School (which is accredited by the Association of Advanced Collegiate Schools of Business)

3.3 Creative and Digital

	Creative and Digital
Nature of specialism	This dynamic sector encompasses visual effects, gaming, animation, creative agencies, app development, and post-production
Key places	• BCP Smart Places programme • Talbot Quarter innovation and incubation space for createch businesses • Internet exchange opportunity which could provide low latency dark fibre 5G connectivity enabling R&D in high tech wearables, autonomous robots and augmented reality
Leading businesses	End State, Intergage, Love Love Films, Poundbury Systems Ltd, Spyrosoft, Studio Global, Talk Think Do, Treehouse, You are the Media
Networks & regional connections	• Silicon South • Links to Central South • BCP Film Office Home page | BCP Film Office
R&D and skills	• Bournemouth University which is the largest UK centre of professional higher education for film and media and has centres relating to computer animation, digital entertainment and computing and informatics • The Arts University Bournemouth, which has the largest film school outside London and conducts research across the creative sectors • Bournemouth & Poole College courses in animation, computing and IT, creative enterprise • Half of the UK's film, visual effects, and video games industry graduates hail from the area

3.4 Health Sciences

	Health Sciences
Nature of specialism	Building on our integrated care system (and associated data), our ageing population and wealth of expertise to create a living lab. Aligned with our Health Science expertise, 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]
Key places	Investment in the area's hospitals. 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
Leading businesses	Nourish Care (others to be confirmed)
Networks & regional connections	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 Wessex health partners Links to Central South

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

4. 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 bio-diverse 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.

4.1 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:

7. 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.
8. 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.

9. The opportunity to **grow our world class, high value 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.

10. 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.

11. 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**.

12. And finally, recognising 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.

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

Frontier businesses

Stimulate, promote and support our high value clusters by:

- 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
- Decarbonising business

Empowered people

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

- Improving education and skills
- 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 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:

- Developing low carbon and renewable energy opportunities
- Encouraging a one health approach
- Improving food security
- Providing green infrastructure to support health and well-being

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, 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
- 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?

- Residents can access walking, cycling and public transport options with more frequent bus and rail services
- Congestion will be reduced at key hotspots on the A31, A35 and A351 enabling people to get to work
- Freight will be able to travel easily to and from the midlands and the North to south coast ports
- Our transport system has been decarbonised and our air quality improved
- Everyone can access full fibre broadband
- Our energy grid is capable of supporting both demand and supply side opportunities
- Our growing businesses are able to find suitable sites and premises.

What are we building on?

	Transport • Joint work to develop a new local transport plan • Membership of Western Gateway Sub National Transport Body
	Digital Connectivity • Project Gigabit • Smart Places programme (BCP) • 5G Rural Dorset
	Grid Capacity • 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
- **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 –** boosting 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.

What next?

We will:

- Work through the Western Gateway Strategic Transport Body to secure investment in the strategic routes within and out of the region including:
    - North-south connectivity between our ports and the Midlands/North (road/rail/freight)
    - Dorset Metro - to improve the frequency of rail services across the area
- 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
- Work in partnership with the Government and private sector to improve digital connectivity including attracting an internet exchange for 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

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

What are we building on?

	Planning and Regeneration • Regeneration plans for Bournemouth, Poole and Weymouth • Local plans in development
	Business community • Business Improvement Districts in Bournemouth Town Centre, Bournemouth Coastal, Poole, Dorchester, Weymouth and Ferndown • 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 • Dorset Ambassadors network
	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. innovative delivery models, stalled sites, planning, community builds etc.)
    - the affordability/accessibility of homes for key workers, graduates and groups
    - the energy efficiency 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.

What next?

We will:

- Through our Housing Roundtable identify public land that is 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.

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.

We also have a wealth of under-utilised low carbon energy opportunities which could be developed to provide energy security and help us to reach net zero.

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. 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.

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:

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

What outcomes do we want to achieve?

- We become a net exporter of low carbon energy
- Our energy and environmental sector will be stronger
- Our residents can get closer to nature and enjoy the benefits
- Our natural environment is more resilient and diverse
- 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 • Salt caverns suitable for hydrogen storage
	Partnerships and support • 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 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 and pioneering a 'one health' approach.

What next?

We will:

- Seek Government support for the development of a large-scale Hydrogen storage facility in Portland to catalyse the development of a hydrogen cluster that spans the south coast
- Establish a strategic working group to co-ordinate local action to support the development of energy projects at Portland port
- Work with the Crown Estate to develop an aquaculture enterprise zone
- 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 pioneer a 'One Health' approach to finding commercial solutions to global health challenges.

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

- Establish a new **Investment Skills Commission** with the Department of Education, Department for Business & Trade, Skills England, the Office for Investment and education providers to develop **a comprehensive workforce investment plan to meet the skills requirements of investors for UK critical investments in the area** building on the national success of the Hinkley Point programme
- Establish a **Celtic Sea FLOW National Taskforce** with the and the Department for Energy Security and Net Zero, GB energy and the Crown Estate to maximise the market leading potential of floating offshore wind in the Celtic Sea and catalyse investment into the area
- Work alongside partners in the GSW to collaborate with the Department for Business & Trade and the Office for Investment in developing **a new, comprehensive investor offer** which can maximise the global potential of the Great South West in key industries to preserve the UK's food, energy, manufacturing and defence security and in parallel, **pioneer a new model for green investment** that builds on the strengths of our natural capital
- Work alongside partners in the GSW to 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 Standard
  - 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:

- Seek from government a long-term funding settlement to replace UKSPF (and other central government business support funding) to enable us to develop a coherent and stable business support ecosystem 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.

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
- 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 –** delivering our skills action plan with activities linked to talent attraction and retention (including careers advice), skills to meet demand and skills for future growth, including the wider use of apprenticeships and skills bootcamps to support 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
- **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
  - the opportunity to deliver more by working together.

Our next steps

We will:

- Seek from government:
  - a long-term funding settlement to replace UKSPF (and other central government funding) to enable us to develop a coherent and stable employment and skills ecosystem across the area
  - closer partnership working with DWP and the Department of Health to allow us to bring together the work and health agenda
- Seek trailblazer status for the pan Dorset area to become a test-bed 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.

Strategic Objective 6: Frontier Businesses

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

Why is this important?

Our frontier businesses 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 in close proximity to 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.

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 Engineering and manufacturing;
    - aerospace
    - defence and security
    - marine and maritime
- finance, fintech and insurance
- creative and digital
- health science.

What outcomes do we want to achieve?

- Our frontier businesses 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 Frontier businesses 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?

- **Inward investment** – attracting inward investment from the UK or overseas into these sectors and their supply chains as well as into our universities
- **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
- **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 frontier businesses.

Our next steps

We will:

- Promote the Dorset Area through Invest in Dorset, the Dorset Ambassador Network and relevant industry events
- With our partners, develop a clear process for landing inward investment enquiries
- Work with key businesses and sector leaders to develop sector-based plans to drive forward growth in these sectors
- 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 frontier businesses and develop bespoke skills development programmes.

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

- Collaborate with the Department for Business & Trade and the Office for Investment in developing **a new, comprehensive investor offer** which can maximise the global potential of the Great South West in key industries to preserve the UK's food, energy, manufacturing and defence security and in parallel, pioneer a new model for green investment that builds on the strengths of our natural capital
- 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**, including a sharp focus on growth firms, 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

To be developed, but list of potential key indicators which could be utilised to measure success.