



**HoTSW Local**

**Industrial Strategy**

**Policy Lab Workshop - 14th June 2019**

# Workshop overview



1. Workshop objectives
2. Hopes and fears
3. Review of missions and potential objectives
4. Achieving the missions and objectives



## Objective for Day

Create a shared understanding of 'what good looks like' for the Heart of the South West (HotSW) local industrial strategy, with a focus on clean growth and what that may look like in the SW.



# 1. Workshop objectives

# Workshop objectives



To create a shared understanding of ‘what good looks like’ for the Heart of the South West (HoTSW) local industrial strategy, with a focus on clean growth and what that may look like in the region.

A group of people are gathered around a round table covered with a white tablecloth, engaged in a meeting. The table is cluttered with various items including papers, a laptop, coffee cups, and glasses. The scene is overlaid with a semi-transparent blue filter. The text "2. Hopes and fears" is prominently displayed in the center of the image in a large, white, sans-serif font.

# 2. Hopes and fears



# Hopes

- “Region has the tools for clarity and vision”
- “Lead the way with the circular economy”
- “There is recognition that one size doesn’t fit all”
- “Better voice in London”
- “HotSW recognised as greenest region for food production in the UK”
- “Increased inward investment with government money to support it”
- “Maintain and optimise our natural assets”
- “A place where people want to be”
- “Better connectivity”



# Fears

- “Done to rather than done with”
- “Rural/urban divide - Falling behind?”
- “Over development”
- “Endless meetings with no outcomes”
- “We do not improve connectivity - transport and digital”
- “Continue to play second fiddle to Northern powerhouse and Midlands machine”
- “Strategy after strategy without delivery”
- “Too many words, not enough action”
- “Disappearance of this”



A large, dimly lit room filled with people sitting at round tables, engaged in discussion. The scene is overlaid with a semi-transparent blue filter. In the foreground, a table is set with white coffee cups, a glass pitcher, and documents. One document is titled "Engineering Futures 03" and features a diagram with a central node and several radiating lines. The overall atmosphere is professional and collaborative.

# 3. Review of missions and potential objectives



Each table reviewed the Mission and Potential Objectives that had been set for the day.

Participants were encouraged to work with the challenges that have been identified, but were given the opportunity to review and adjust them if necessary.

# Missions

## Energy futures

1. R&D in clean energy
2. Energy clusters
3. Supply chains

## Engineering futures

1. R&D in engineering
2. Anchor engineering clusters
3. Supply chains

## Digital futures

1. Environmental intelligence market
2. Agritech capabilities
3. Marine geospatial innovation
4. Health technology pioneer

# Objectives

# Key themes

During a plenary session areas where the industrial strategy needs to focus more were highlighted:

- Manufacturing needs to be included with engineering
- How can the local communities/economy benefit from clean energy developments?
- Need for cultural and social development
- Need for a whole system approach to R&D
- How can the local industrial strategy deliver social mobility?
- More focus on skills development



A blue-tinted background image showing a group of people in a meeting room. They are seated around tables, looking at documents and talking. One document in the foreground is titled "Digital futures (1)".

# 4. Achieving the missions and objectives

## We asked tables to work through the worksheets, including:



- Providing exemplars or case studies of how the mission/objective could be achieved. This could be locally, nationally or internationally, and the case studies could be exemplars to be inspired by and/or competition we may need to overcome.
- Providing a 'site rep' of the 5 productivity foundations for each economic opportunity in the HotSW region.
- Providing a narrative of what success looks like for each of the mission/objectives
- Drawing what success looks like for each of the mission/objectives

# Key themes

Each table focused on a unique objective. However, there key themes highlighted by multiple groups, including:

- Collaboration across the region and the country, utilising local expertise
- Develop centres of excellence for research and innovation
- Develop skilled workforce and retain talent
- Both protect and utilise the unique natural assets of the region
- Enable small/new business - e.g. with incentives, with accessible data



# Mission 1: Energy futures

Exploit opportunities to establish a globally significant energy cluster building on nuclear and renewables to transform the Heart of the South West's own energy system to be energy positive.



# Objective 1: R&D in clean energy

Using existing R&D excellence for offshore renewable energy in research centre and testing facilities to deliver the the next generation of renewables.

# Case studies

## Local:

- Cranbrook energy plant - serving new communities
- Andigestion - food waste recycling plant, innovators in anaerobic digestion

## UK:

- Wave hub, Hayle - manages offshore test sites for renewable energy developers

## International:

- Orkney hydrogen conservation, Surf N' Turf - uses surplus electricity generated from renewable energy to make hydrogen gas as a fuel.

mplar (local)  
energy plant - serving  
community  
Devon AD plant.

Case stud  
Issue h

**POLICY LAB**

What does success look like?  
collaboration across  
smaller businesses to have  
benefit from renewable

regen. options (affordable  
(objective) tech).  
an is wrong. (needs to be  
not focus just on offshore  
regen relationship with renewable.  
offshore not a strength @  
moment.

image

weet or headline  
Mind the  
# Energy gap!

Industrial Strateg

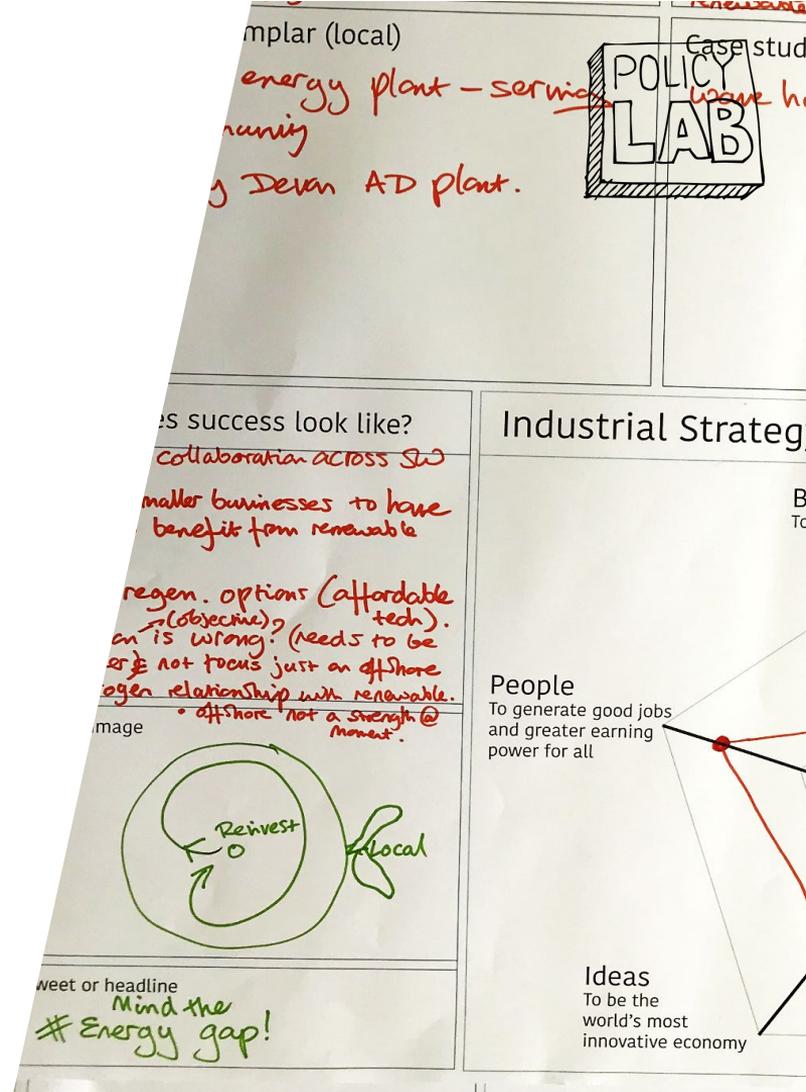
People  
To generate good jobs  
and greater earning  
power for all

Ideas  
To be the  
world's most  
innovative economy

# Vision for success

## Headline: Mind the #Energy Gap!

- Collaboration across SW
- Enable small businesses to have the tools needed to benefit from renewable energy
- Micro-regeneration options with affordable tech
- Need to focus on more than just offshore energy
- Develop the relationship between hydrogen and renewable energy



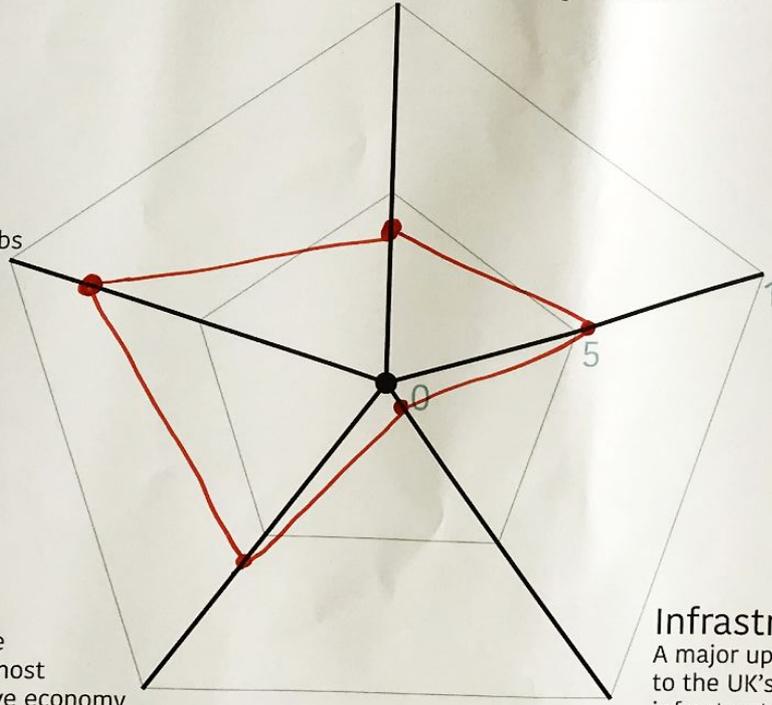
# Productivity foundations

Please explain scoring for foundations here:

**Business Environment**  
To be the best place to start and grow a business

**People**  
To generate good jobs and greater earning power for all

**Ideas**  
To be the world's most innovative economy



0 = very poor  
10 = excellent

**Place**  
To have prosperous communities across the UK  
*inclusive / thriving*

**Infrastructure**  
A major upgrade to the UK's infrastructure

**Business Environment**  
*Digital infrastructure is poor but Quality of Env. Good*

**Place**  
*Good potential - but Areas of deprivation*

**Infrastructure**  
*Digital / roads / rail etc poor -> needs greater investment*

**Ideas**  
*Strong potential*

**People**  
*lots of opportunity for people to learn & stay. Retain skills,*



1



## Objective 2: Energy clusters

By 2030 HotSW will be home to a world renowned cluster of high value businesses with transformable expertise and advanced engineering and expertise in nuclear futures.

# Case studies

## Local:

- Nuclear SW cluster > Hinkley Point C supply chain team > broadens to other parts of nuclear sector

## UK:

- NW nuclear ecosystem
- Culham centre fusion energy
- Rutherford Appleton Laboratory
- Trident successor program
- AWRE, Aldermaston

## International:

- IRET Cadarache
- Burgundy cluster

Mission

ENERGY FUTURES (C)

HOW DOES THIS IS LINK WITH THE PRODUCTIVITY PLAN?

Potential objective

By 2030 HOSW will be home to a world renowned cluster of value businesses with high potential expertise in advanced engineering and expertise in nuclear power FUT (NOTE CHANGE OF WORDING)

PRODUCT LEAD

Case study/exemplar (local)

NUCLEAR SW CLUSTER



MPC SUPPLY CHAIN TEAM (SOMERSET CHAMBER)



BROADEN TO OTHER ASPECTS OF NUCLEAR

Case study/exemplar (UK)

- NW NUCLEAR ECOSYSTEM
- CCFE (FUSION)
- ~~NUCLEAR~~ RUTHERFORD APPLETON DIAMOND LIGHT SOURCE
- TRIDENT SUCCESSOR PROG
- AWRE ALDERMASTON

What does success look like?

Narrative

FUSION RESEARCH  
CENTRE BUILT IN SW  
[BRISTOL UNI, MPC LOGISTICS + SKILLS EXPERTISE]

Visual image



Tweet or headline

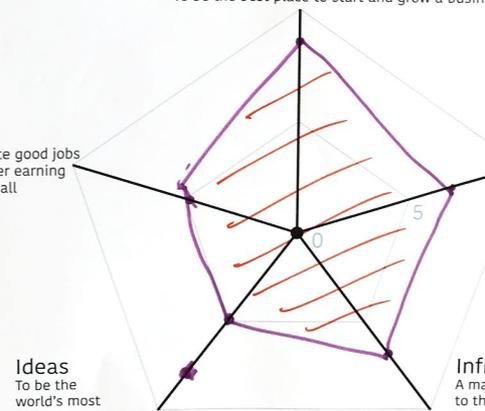
SUN ON EARTH - FUSION IN OUR LIFETIMES

Industrial Strategy foundations HotSW

Business Environment

To be the best place to start and grow a business

People  
To generate good jobs and greater earning power for all



Ideas  
To be the world's most innovative economy

Infr  
A ma to the infras

# Vision for success

**Headline: Sun on Earth - Fusion in our Lifetimes!**

- Fusion research centre built in SW region
- Utilise Bristol University, Hinkley Point C logistics and skills expertise

Mission

ENERGY FUTURES (

HOW DOES THIS IS LINK WITH THE PRODUCTIVITY PLAN?

Potential objective

By 2030 HOSW will be helping to build regional value businesses with high potential expertise in advanced engineering and expertise in nuclear fusion (NOTE CHANGE OF WORDING)

PRODUCT LEAD

Case study/exemplar (local)

NUCLEAR SW CLUSTER



MPC SUPPLY CHAIN TEAM (SOMERSET CHAMBER)



BROKEN TO OTHER ASPECTS OF NUCLEAR

Case study/exemplar (UK)

- NW NUCLEAR ECOSYSTEM
- CCFE (FUSION)
- ~~UK~~ RUTHERFORD APPLETON DIAMOND LIGHT SOURCE
- TRIDENT SUCCESSOR PROG
- AWE ALDERMASTON

What does success look like?

Narrative

FUSION RESEARCH CENTRE BUILT IN SW  
[BRISTOL UNI, MPC LOGISTICS + SKILLS EXPERTISE]

Visual image



Tweet or headline

SUN ON EARTH - FUSION IN OUR LIFETIMES

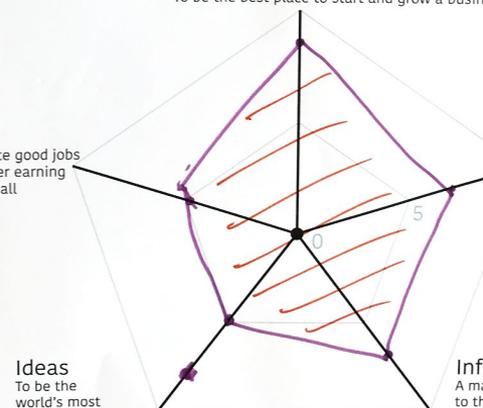
Industrial Strategy foundations HotSW

Business Environment

To be the best place to start and grow a business

People

To generate good jobs and greater earning power for all



Ideas

To be the world's most innovative economy

Infr

A ma to the infras

# Productivity foundations



Please explain scoring for foundations here

## Business Environment

To be the best place to start and grow a business

Business Environment

ESTABLISHED SUPPLY CHAIN,  
EXISTING ENT ZONES

## People

To generate good jobs  
and greater earning  
power for all

Place

POTENTIAL SITES, STAKEHOLDERS  
SUPPORTIVE

0 = very poor  
10 = excellent

## Place

To have prosperous  
communities across  
the UK

Infrastructure

TRANSMISSION NETWORK, ~~ROADS~~,  
MARINE + LOGISTIC FACILITIES

## Ideas

To be the  
world's most  
innovative economy

Ideas

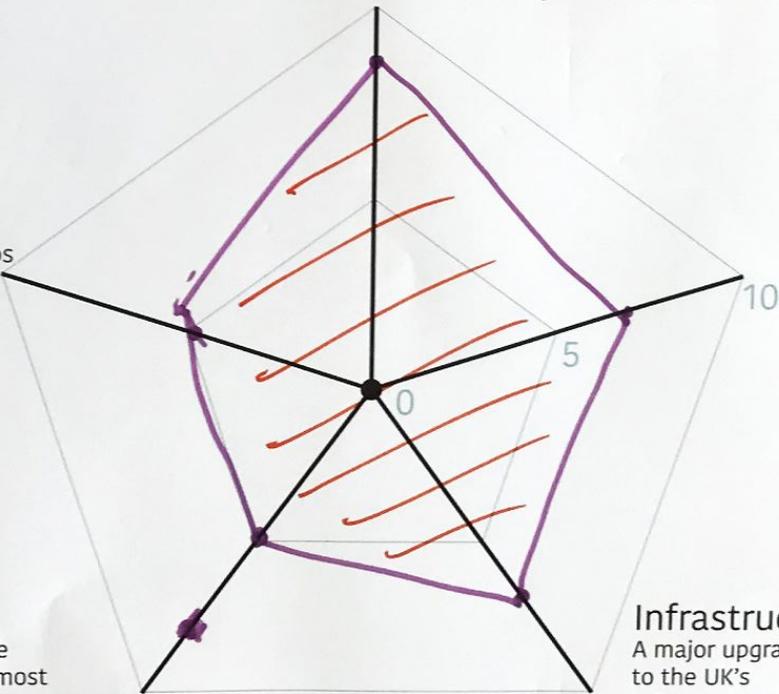
TOP QUALITY UNIVERSITIES  
ROBOTICS INSTITUTE/LABS

## Infrastructure

A major upgrade  
to the UK's  
infrastructure

People

EXISTING  
SKILLED WORKFORCE





# Objective 3: Improving infrastructure

Ensure investment of the necessary £275Bn required to transform the South West's energy infrastructure and meet clean energy goals.

# Case studies

## Local:

- FAB project
- Langage power plant - missed opportunity as it runs at 23%
- Jobs and skills development at Hinkley with development of supply chains
- Solar carports and PV fields

## UK:

- SE offshore wind - huge benefit to local economy
- Electrification of rail - Only until Bristol

## International:

- Passivhaus - energy efficient buildings

Mission  
THE HEART OF THE SOUTH WEST WILL EXPLOIT OPPS TO ESTABLISH A GLOBALLY SIGNIFICANT ENERGY CLUSTER, BUILDING ON ASSETS IN NEW NUCLEAR, RENEWABLES + TRANSFORM HOTSW'S OWN ENERGY SYSTEM TO BE ENERGY POSITIVE.

Potential objective

?!



Case study/exemplar (local)

- F.A.B. PROJECT
- LANGAGE POWER PLANT (BUT ONLY RUNS AT 23%) - MISSED OPPORTUNITY
- EFW PLANT - HGAT MISSED OPP.
- JOBS + SKILLS DEVT. @ HINKLEY + DEVT. OF SUPPLY CHAIN
- SOLAR CAR PORTS + PV FIELDS
- BIODIMETHANE GAS OPPS?

Case study/exemplar (UK)

- OFFSHORE WIND IN SOUTH EAST - IMPACT ON LOCAL ECONOMY IS HUGE
- WAVE POWER (TIDAL (WAVE HUB??))
- ELECTRIC BUS FLEETS? (INFRASTRUCTURE REQUIREMENT CHALLENGE)
- ELECTRIFICATION OF RAIL - STOPS @ BRISTOL !!

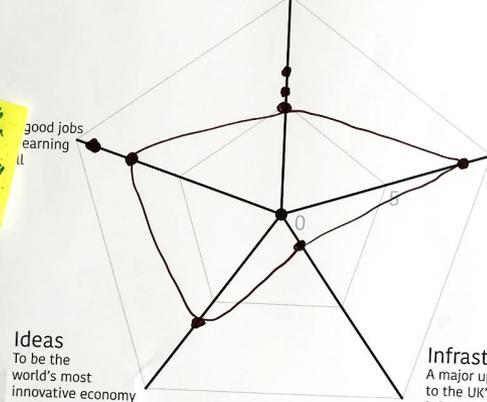
does success look like?

CHALLENGE IN RURAL AREAS THAT MEETS OUR DEMANDS EFFICIENCY NAT. ENV. + ASSETS ENERGY HOTSW AS NATIONAL LEAD DEPT IN EMERGING IND

Industrial Strategy foundations HotSW map

2050 80% to be pulled via...  
too narrow needs to be integrated...  
local energy networks are key...  
not mega projects

Business Environment  
To be the best place to start and grow a business



Ideas  
To be the world's most innovative economy

Infrastructure  
A major upgrade to the UK's infrastructure

# Vision for success

## Headline: Energy Positive HotSW!

- HotSW as national leader
- Investment in public transport - major challenge for rural areas
- Self sufficiency and energy that meets demands
- Preservation of natural environment and assets
- Skills development in emerging industry

**Mission**  
 THE HEART OF THE SOUTH WEST WILL EXPLOIT OPPS TO ESTABLISH A GLOBALLY SIGNIFICANT ENERGY CLUSTER, BUILDING ON ASSETS IN NEW NUCLEAR, RENEWABLES + TRANSFORM HOTSW'S OWN ENERGY SYSTEM TO BE ENERGY POSITIVE.

Potential objective  
 ?!

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**Case study/exemplar (local)**

- F.A.B. PROJECT
- LANGAGE POWER PLANT (BUT ONLY RUNS AT 23%) - MISSED OPPORTUNITY
- EFW PLANT - HEAT MISSED OPP.
- JOBS + SKILLS DEPT. @ HINCKLEY + DEPT. OF SUPPLY CHAIN
- SOLAR CAR PORTS + PV FIELDS
- BIOMETHANE GAS OPPS?

**Case study/exemplar (UK)**

- OFFSHORE WIND IN SOUTH EAST - IMPACT ON LOCAL ECONOMY IS HUGE
- WAVE POWER (TIDAL WAVE HUB??)
- ELECTRIC BUS FLEETS? (INFRASTRUCTURE REQUIREMENT CHALLENGE)
- ELECTRIFICATION OF RAIL - STOPS @ BRISTOL !!

does success look like?

INVEST IN PUBLIC TRANSPORT  
 CHALLENGE IN RURAL AREAS  
 THAT MEETS OUR DEMANDS  
 EFFICIENCY  
 NAT. ENV. + ASSETS  
 ENERGY  
 ENERGY  
 SWPT IN EMERGING IND

Industrial Strategy foundations HotSW map

# Productivity foundations



Please explain scoring for foundations here:

**Business Environment**  
To be the best place to start and grow a business

**Business Environment**  
NOT THERE YET -  
SOME BUT TAKE UP  
BUT OTHER CONSTRAINTS LIMITING

0 = very poor  
10 = excellent

**Place**  
FANTASTIC NATURAL  
ASSET WITH HUGE  
POTENTIAL

**Place**  
To have prosperous  
communities across  
the UK

**Infrastructure**  
CONSTRAINED BY  
THE GRID

good jobs  
earning

**Ideas**  
To be the  
world's most  
innovative economy

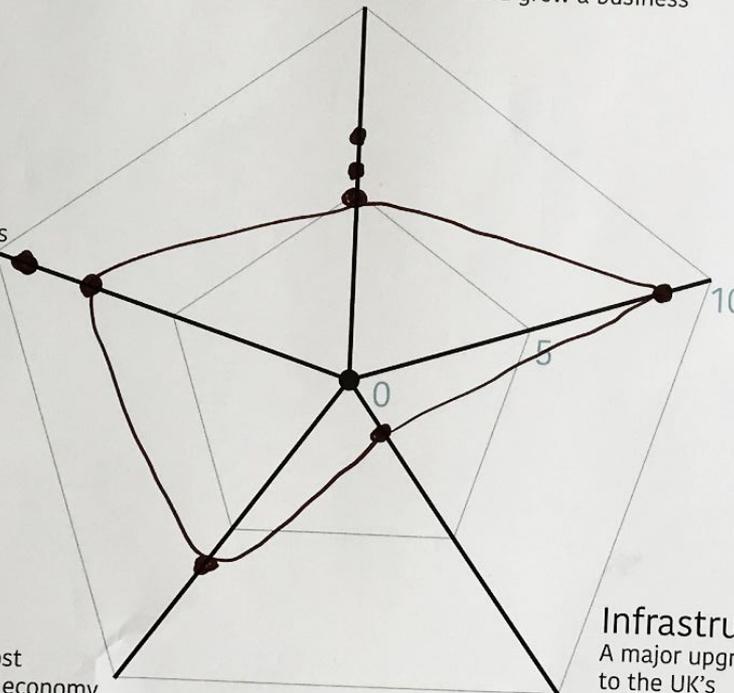
**Ideas**  
SOME SECTORS  
STRONGER THAN OTHERS  
eg MARINE

**Infrastructure**  
A major upgrade  
to the UK's  
infrastructure

**People**  
HUGE POTENTIAL WITH  
COLLEGES / UNIVERSITIES  
BUT DIFFICULTY  
RETAINING.

2050 80%  
too late  
radical vision  
needed

Do we have  
'skilled' people  
to deliver these  
outcomes? need  
to grow & develop  
homegrown talent



REGAS.  
DS  
GAD  
2019  
OTSW

# Mission 2: Engineering futures

HotSW will double the size of its engineering sector by 2038 and establish globally significant engineering capabilities building on its strengths marine, nuclear and aerospace.



# Objective 1: R&D in engineering

Anchor, grow and attract R&D in engineering businesses and research organisations.

# Case studies

## Local:

- Hinkley supply chain project
- Leonardo/iAero
- Gravity - aeronautical innovation

## UK:

- Manufacturing technology centre (MTC)
- SW Institute of Technology

## International:

- Florida is a centre of excellence for optics and photonics

Handwritten notes and diagrams on a case study template.

**Top Left:** Manufacturing not just engineering.

**Top Middle:** Exemplar (local)

**Top Right:** POLICY LAB (UK) Case study exemplar (UK)

**Middle Left:** Key supply chain project. Leonardo/iAero. Impact. Gravity.

**Middle Right:** Links to MTC ( Coventry ). SWIOT

**Bottom Left:** What does success look like? Initiative. Keep our young people here - keep our talent here. Attracting talent - high value jobs - prosperous place to live.

**Bottom Middle:** Visual image. Anchor. Grow. Attract. "magnetic".

**Bottom Right:** Tweet or headline. The SWI - a magnet for opportunity. A big magnet for opportunity.

**Right Side:** Industrial Strategy foundations. Business Environment. To be the best place to start and... People. To generate good jobs and greater earning power for all. Ideas. To be the world's most innovative economy.

# Vision for success

## Headline: The SW - A Magnet for Opportunity!

- Talent retention - Keep our young people here
- Attract new talent with high value jobs
- Create a prosperous place to live

manufacturing not just engineering.

Case study exemplar (local)

Policy LAB

links to MTC (Coventry)

SW10T

Key supply chain project.

Auto/Aero

percent

ativity

What does success look like?

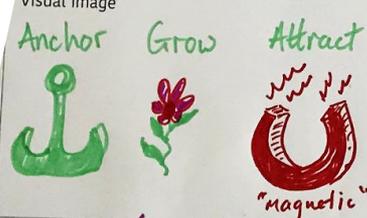
ative

Keep our young people here - keep our talent here

attracting talent - high value jobs - prosperous place to live.

Visual image

Anchor Grow Attract



"magnetic"

People  
To generate good jobs and greater earning power for all

Business Environment  
To be the best place to start and

Ideas  
To be the world's most innovative economy

Tweet or headline

The SW - a magnet for opportunity!

A big magnet for opportunity

# Productivity foundations

Please explain scoring for foundations here:

**Business Environment**  
To be the best place to start and grow a business

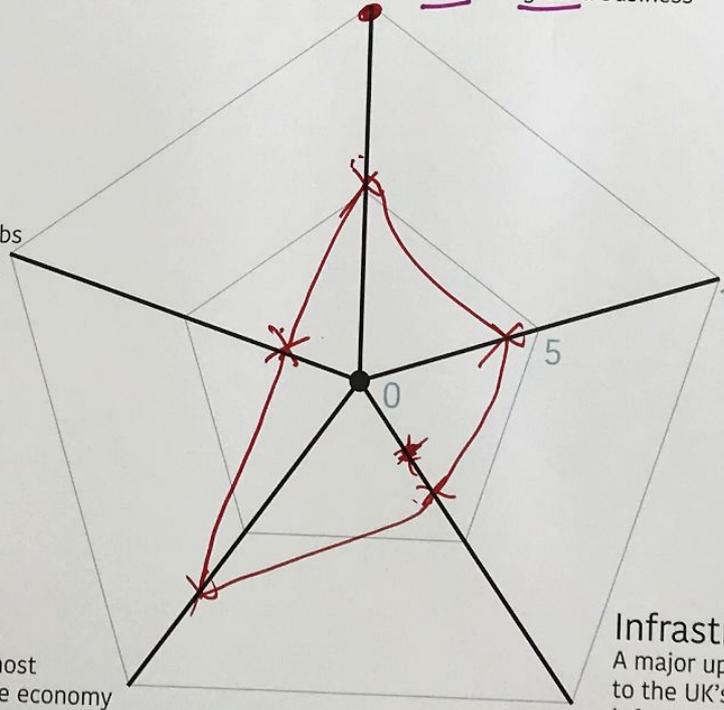
**People**  
To generate good jobs and greater earning power for all

**Ideas**  
To be the world's most innovative economy

**Infrastructure**  
A major upgrade to the UK's infrastructure

0 = very poor  
10 = excellent

**Place**  
To have prosperous communities across the UK



**Business Environment**

Inconsistent start ups across patch  
Supply of space / labour etc

**Place**

Disparity across the areas, slower levels of growth + risk it doesn't improve for all.

**Infrastructure**

Arterial links improving but nature of region difficult. Need faster delivery + digital / rail etc

**Ideas**

IP / Patents low but ... sense that we could be great.

**People**

Full employment, not high skilled enough. Need to develop, retain + attract talent.

## Objective 2: Anchor engineering clusters

Anchor high value engineering clusters within the area through dedicated hubs focussing on marine, nuclear and aerotech.

# Case studies

## Local:

- Hinkley Point C
- Maritime 2050 strategy
- Geospatial - Newquay, Bristol, Yeovil

## UK:

- 10X strategy in nuclear industry
- Digital/life sciences in Cambridge

## International:

- Team Germany - medium and large businesses that are vertically integrated

HotSW to 2X eng sector by 2038 + globally signi (rank in marine, nuclear, aero) (20yrs)

Potential objective  
Focus on clear objectives in Marine, Nuclear, Aero. Shrink | focus (on aero, etc).

Case study/exemplar (UK)  
10x strategy within the Nuclear industry  
Digital / Lifesciences in Cambridge

Case study/exemplar (local)  
Hinkley point C  
Maritime 2050  
Geospatial - Newquay, Bristol, Yeovil

2x might be under ambitious with Hinkley

DotT policy

How clusters work across LEP borders.

success look like?  
To become a globally recognised within these sectors + towards clusters.

Industrial Strategy foundations HotSW map

Business Environment  
To be the best place to start and grow a business

People  
To generate good jobs and greater earning power for all

Land, Sea within localities, Community

The Inverted Bermuda Triangle.

Ideas  
To be the world's most innovative economy

Infrastr  
A major up to the UK infrastruc

# Vision for success

**Headline: Air, land and sea within a coastal, collaborative community!**

To become a nationally recognised centre of excellence within these three sectors and vectorise towards development of the clusters.

HotSW to 2X eng sector by 2038 + globally significant in marine, nuclear, aero (20 yrs)

Potential objective  
Focus on clear objectives in Marine, Nuclear, Aero. Shrink | focus

Case study/exemplar (UK)  
10x strategy within the Nuclear industry  
Digital Lifesciences in Cambridge

study/exemplar (local)  
in key point C  
2x might be under ambitious with Hincley

Maritime autonomy 2050  
DoT policy

Geospatial - Newquay Bristol Yeovil

How clusters work across LEP borders.

success look like?  
To become a nationally recognised centre of excellence within these three sectors + vectorise towards development of the clusters.

Industrial Strategy foundations HotSW map

Business Environment  
To be the best place to start and grow a business

People  
To generate good jobs and greater earning power for all

Infrastructure  
To be the world's most innovative economy

Infrastr  
A major u  
to the UK  
infrastruc

The Inverted Bermuda Triangle.

Land, Sea within coastal, collaborative community



Please explain scoring for foundations here:

# Productivity foundations

a  
sed  
use

**Business Environment**  
To be the best place to start and grow a business

Business Environment **(7)**  
Great for small business  
Need more work to exploit the great start.

0 = very poor  
10 = excellent

Place **(8)**  
Good for location on sea, land + geospatial

Place  
To have prosperous communities across the UK

Infrastructure **(3)**  
Grid to S/W is poor  
Trains, Air, local transport.

How they are now.

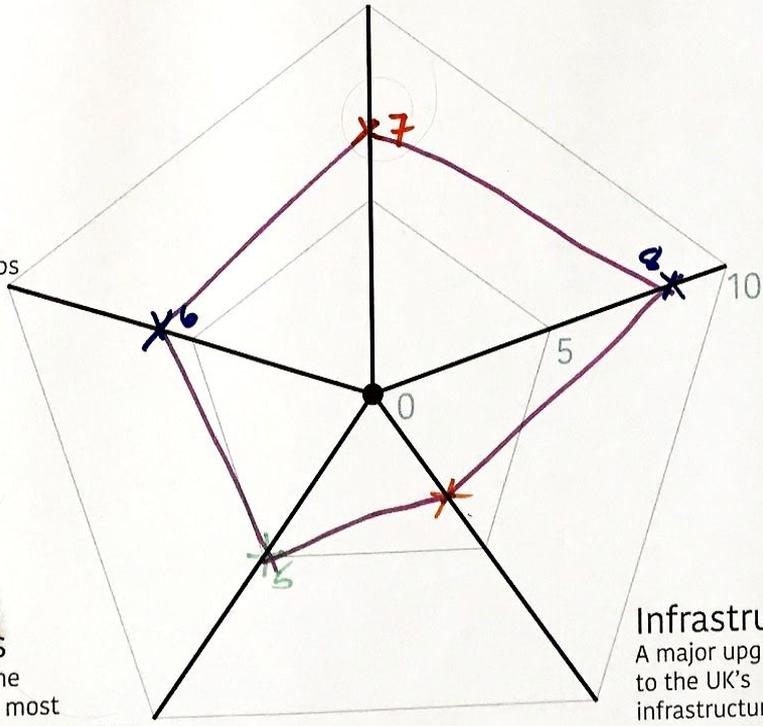
Ideas **(5)**  
innovative  
Great, minds, but not exposed to the sector.

**People**  
To generate good jobs and greater earning power for all

People **(6)**  
I of TECH, 2x UNIV's, 5x FE's  
so lots to exploit. Match market with the learning

**Ideas**  
To be the world's most innovative economy

**Infrastructure**  
A major upgrade to the UK's infrastructure



The Inverted Bermuda Triangle.

within community

borders.



# Objective 3: Engineering supply chains

Capitalise on key opportunities to strengthen industrial supply chains.

# Case studies

## Local:

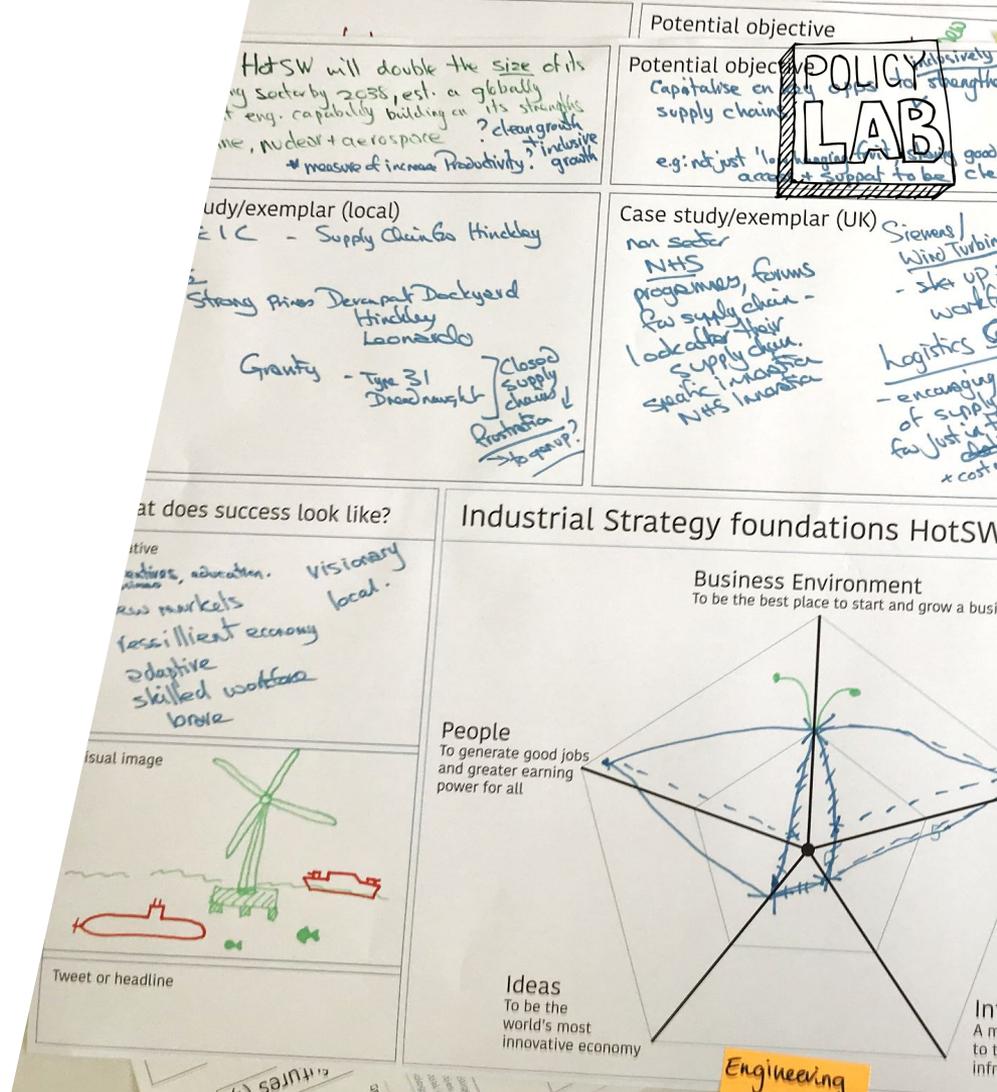
- SEIC - supply chain to Hinkley
- Leonardo
- Gravity - aeronautical innovation

## UK:

- NHS - innovation in supply chains
- Siemens/wind turbines - upskilling workforce
- Logistics sector - encourage co-location of supply chains for just in time delivery

## International:

Gravity - Hope to be international supply chain examples



# Vision for success

- Focus on incentives and education to business
- Create resilient economy
- Move into new markets
- Ensure the sector is both brave and adaptive
- Visionary and local

**POLICY LAB**

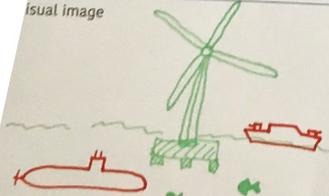
Potential objective  
Capitalise on... supply chains  
e.g. not just 'low cost' but 'strongly good' accept support to be 'cle'...

HotSW will double the size of its sector by 2035, est. a globally eng. capability building on its strengths in... nuclear + aerospace... ? clean growth ? inclusive growth  
→ measure of increase Productivity.

Study/exemplar (local)  
EIC - Supply Chains Hinckley  
Strong Pines Develop Dockyard Hinckley Leonardo  
Gravity - Type 31 Dreadnaught } Closed supply chains ↓ Protection → gear up?

Case study/exemplar (UK)  
non sector  
NHS programmes, forums  
few supply chains - look after their supply chain. specific innovation NHS innovation  
Siemens Wind Turbine  
- step up... work...  
logistics  
- encouraging of supply...  
few just in time...  
+ cost

What does success look like?  
...visionary local.  
resilient economy  
adaptive skilled workforce  
broad

Visual image  


Tweet or headline

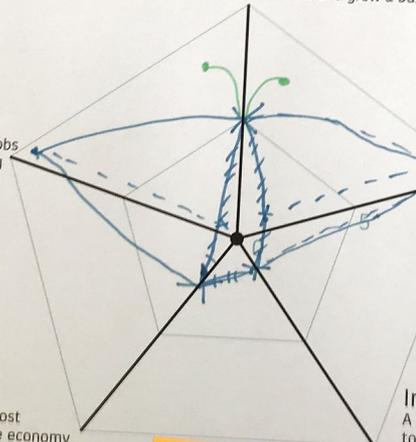
Industrial Strategy foundations HotSW

Business Environment  
To be the best place to start and grow a business

People  
To generate good jobs and greater earning power for all

Ideas  
To be the world's most innovative economy

Engineering



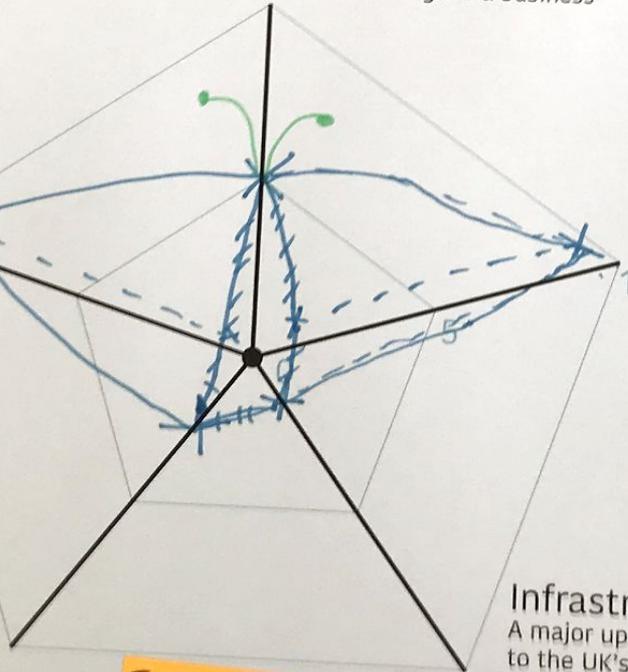


# Productivity foundations

**Business Environment**  
To be the best place to start and grow a business

**People**  
To generate good jobs and greater earning power for all

**Ideas**  
To be the world's most innovative economy



0 = very poor  
10 = excellent

**Place**  
To have prosperous communities across the UK

**Infrastructure**  
A major upgrade to the UK's infrastructure

Engineering Supply chain

Please explain scoring for foundations here:

**Business Environment**  
Show we can do it  
lack of networks + sharing good practice + scale.

**Place** extremes - some excellent, some very poor  
no significant clusters  
some clusters, some areas not touched.

**Infrastructure** Rail Road not great  
Space e.g: Employment Land.  
Broadband only optica

**Ideas** No Innovate funding  
No ReD related  
Lack of patents

**People** shortage of STEM skills  
Bos. Inclusion levy?



# Mission 3: Digital futures

Develop strategically significant digital cluster, built on its unique assets that will enable the area to trail blaze into major growth markets.



# Objective 1: Environmental intelligence

Exploit the area's data and research capability to capitalise on the rapid growth of the environmental intelligence market.

# Case studies

## Local:

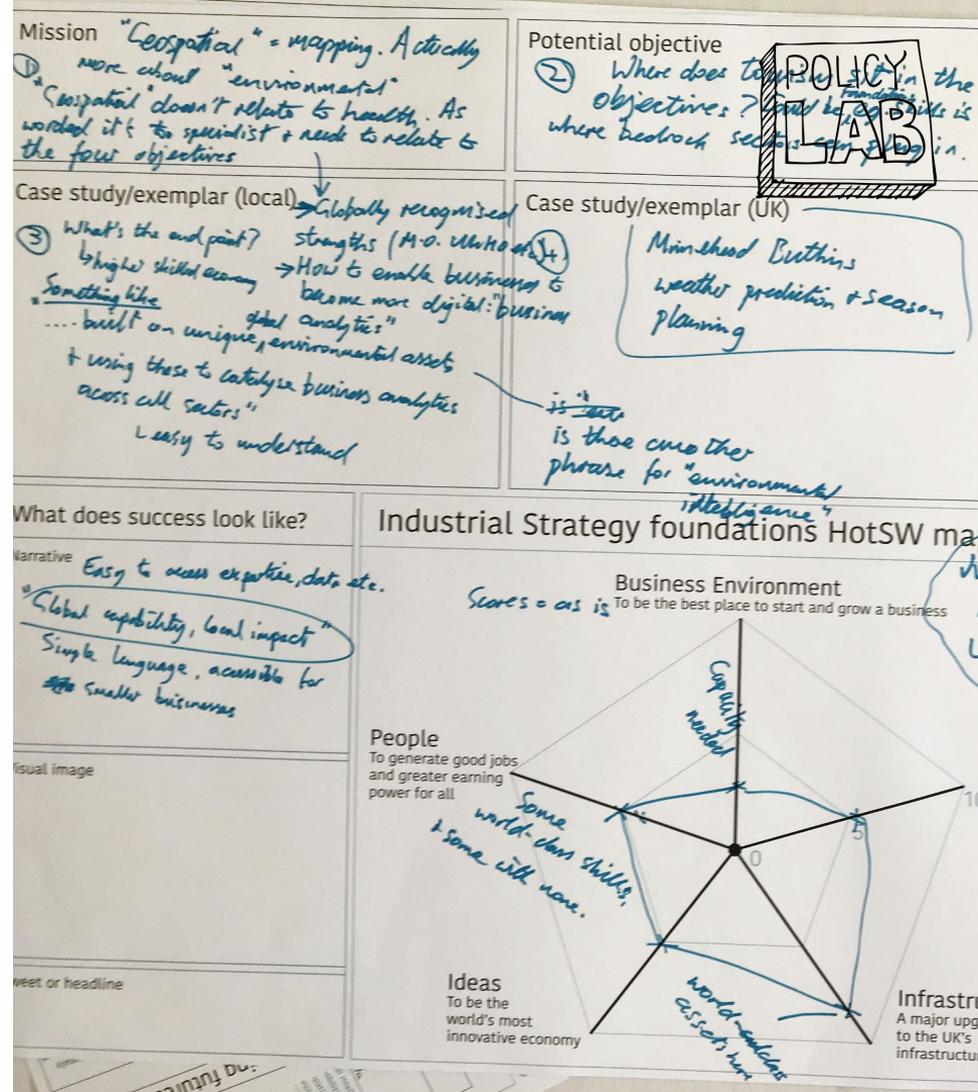
- Met Office - globally recognised strength of the region

## UK:

- Minehead - Butlins weather prediction and season planning

## International:

- UKHO



# Vision for success

## Headline: Global Capability, Local Impact!

- Achieve a higher skilled economy - enable businesses to become more digital
- Build on unique environmental assets and use these to catalyse business analytics across all sectors
- Easy to access expertise and data
- Simple language and accessible for smaller businesses

Mission "Geospatial" = mapping. Actually more about "environmental". "Geospatial" doesn't relate to health. As worded it's too specialist + needs to relate to the four objectives

Potential objective ② Where does this fit in the objectives? Could be, but skills is where health sectors can plug in.

Case study/exemplar (local) → Globally recognised strengths (H.O. White et al.) → How to enable businesses to become more digital: "business digital analytics" → built on unique, environmental assets + using these to catalyse business analytics across all sectors. Easy to understand

Case study/exemplar (UK) → Mynshood Brothers weather prediction + season planning

is there is there another phrase for "environmental intelligence"?

What does success look like? Easy to access expertise, data etc. "Global capability, local impact" Simple language, accessible for smaller businesses

Industrial Strategy foundations HotSW map

Business Environment To be the best place to start and grow a business Scores = as is

Capacity needed

People To generate good jobs and greater earning power for all Some world-class skills, + some with none.

Ideas To be the world's most innovative economy world-class AI, soft-hw

Infrastructure A major upgrade to the UK's infrastructure

POLICY LAB

# Productivity foundations

data etc.  
for

is there another

Office

Scores = as is

**Business Environment**  
To be the best place to start and grow a business

✓✓ Assets  
✓ Skills  
Linkages lacking  
0 = very poor  
10 = excellent

**People**  
To generate good jobs and greater earning power for all

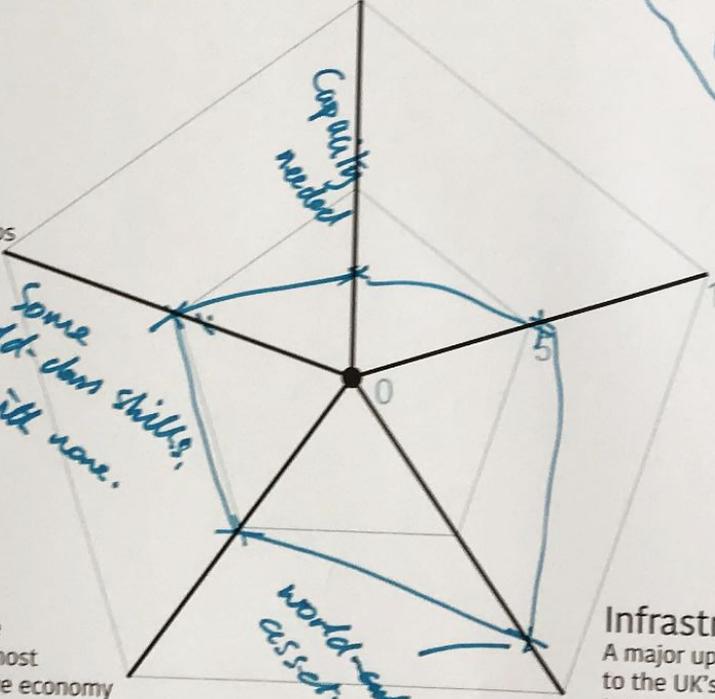
Some world-class skills, + some with none.

**Ideas**  
To be the world's most innovative economy

world-class  
U.S. set's bar

**Place**  
To have prosperous communities across the UK

**Infrastructure**  
A major upgrade to the UK's infrastructure



Please explain scoring for foundations here:

**Business Environment** Leaders  
Enabling businesses to become more "intelligent"

**Place**  
Use UKto/Net office to cooperate with SMEs

**Infrastructure**

**Ideas**  
Accessible products/services for smaller businesses to use analytics to push/pull products to targeted demand

**People**  
Analytics skills + use of data

eg. demand forecasting



## **Objective 2: Agritech capabilities**

**Widespread uptake and growth on farms and wider business across HotSW region.**

# Case studies

## Local:

- Agri-EPI south west dairy development centre
- 5G test bed

## UK:

- Hands Free Hectare, Harper Adams - autonomous farming
- Plymouth Uni - Automatic brassica picker

## International:

- Agri EPI - China, NZ, USA, Japan, Paraguay, India, Canada
- Rothamsted - global soil platform
- Wageningen Dairy Campus - Netherlands

Case study/exemplar (local)

Agri EPI - SW Dairy Development Centre  
5G Test Bed.

duncan.forbes@agri-epicentre.com  
(for more details / case study on Agri EPI / SW Dairy Develpt Centre & 5G cows)  
- based nr Shapton Millard, Somerset.

Case study/exemplar (UK)

Hands Free Hectare  
Plymouth Uni. - automatic brassica picker



What does success look like?

Narrative

Wide spread adoption on farms and Hobbs, the wild SW and the d...  
port technology / go high, best practice

Image



artistic interpretation only!  
No cows were harmed in the creation of this image

line

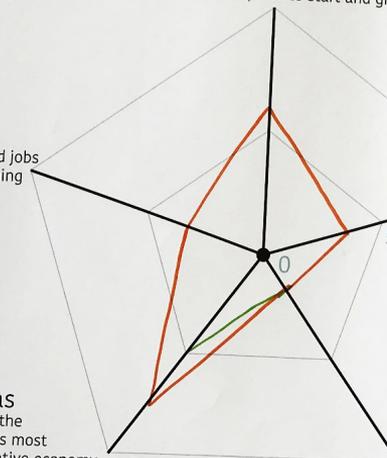
connected cows

Industrial Strategy foundations H

Business Environment  
To be the best place to start and grow

People  
To generate good jobs and greater earning power for all

Ideas  
To be the world's most innovative economy



Engineering Supply

# Vision for success

## Headline: #Connected Cows!

- Widespread adoption of agri-tech on farms around HotSW, the wider SW region and the world...
- Export of technology and optics
- Show best practice

Case study/exemplar (local)

Agri: EPI - SW Dairy Development Centre

5G Test Bed.

duncan.forbes@agri-epicentre.com  
(for more details / case study on Agri EPI / SW Dairy Develp Centre & 5G cows)  
- based nr Shapton Milllet, Somerset.

Case study/exemplar (UK)

Hands Free between Har...

Plymouth Uni. - academic research

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What does success look like?

Narrative

Wide spread adoption on farms and Hobbs, the wider SW and the world...  
port technology / optics, best practice

Image



artistic interpretation only!  
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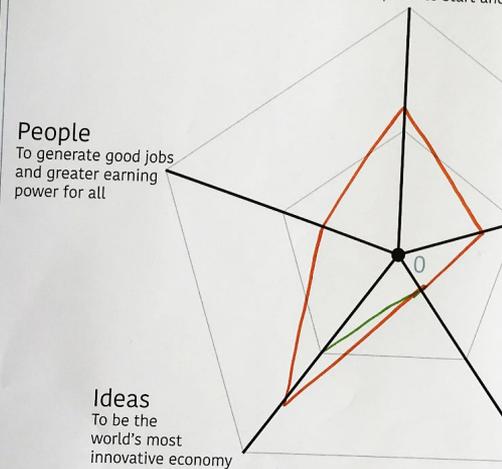
connected Cows

Industrial Strategy foundations H

Business Environment  
To be the best place to start and grow

People  
To generate good jobs and greater earning power for all

Ideas  
To be the world's most innovative economy



engineering supply

# Productivity foundations



Please explain scoring for foundations here:

**Business Environment**  
To be the best place to start and grow a business

**People**  
To generate good jobs  
and greater earning  
power for all

0 = very poor  
10 = excellent

**Place**  
To have prosperous  
communities across  
the UK

**Ideas**  
To be the  
world's most  
innovative economy

**Infrastructure**  
A major upgrade  
to the UK's  
infrastructure

Business Environment

*Challenging, but with a good overall reputation*

Place *Only in a few key places e.g. Exeter (but of infrastructure in other locations)*

Infrastructure

*Very poor & challenging*

Ideas

*World leading, but not commercial enough*

People

*Small pool of people - not widespread*



# Objective 3: Marine geospatial innovation

Unlock market opportunities in marine geospatial information and become a world leader in marine geospatial innovation

# Case studies

## Local:

- Marine autonomy, Thales
- UKHO - Innovation driving marine decision making

- Met Office

## UK:

- National Oceanographic Centre - Marine Robotics Innovation Centre
- Ordnance Survey Geospatial Centre

## International:

- H-Farm
- Port of Rotterdam
- Nippon Foundation

Handwritten notes on a grid background, including a 'POLICY LAB' stamp and various diagrams.

**GEOSPATIAL INNOVATION**

UNLOCK MARKET OPPOR  
IN MARINE GEOSPATIAL

**POLICY LAB**

Case study/exemplar (local) *THALES*

- MARINE AUTONOMY (TURN CHAPEL)
- UKHO - INNOVATION DRIVING MARINE DECISION-MAKING
- MET OFFICE / EXETER UNI / LEP

Case study/exemplar (UK)

- NATIONAL OCEANOGRAPHIC CENTRE  
↳ ROBOTICS CENTRE - SOUTH
- ORDNANCE SURVEY GEOSPATIAL

What does success look like?

Narrative **\*INNOVATION CENTRE\***

- INNOVATION CLUSTER - INC
- ACADEMIC INSTITUTIONS/COLLABORATIONS
- NEW HIGH VALUE JOBS / SKILLS
- INWARD INVESTMENT (DIGITAL)
- NEW START-UPS
- NATIONAL MARINE GEOSPATIAL DATA ASSETS
- CLEAN GROWTH

Visual image

**BLUE PLANET**

**CLEAN (Robot + Decarbon)**

**(BRENDAN DREW THIS AGE 4)**

Tweet or headline

**MARINE DECISIONS MADE EASY**

**Industrial Strategy foundations Ho**

**Business Environment**  
To be the best place to start and grow

**People**  
To generate good jobs and greater earning power for all

**Ideas**  
To be the world's most innovative economy

# Vision for success

## Headline: Marine Decisions Made Easy!

- Innovation cluster including academic institutions and collaborations
- New high value jobs and skills
- Inward investment
- Development of new start-ups
- National marine geospatial data assets
- Clean growth

UNLOCK MARKET OPPORTUNITIES IN MARINE GEOSPATIAL INNOVATION

Case study/exemplar (local) *THALES*

- MARINE AUTONOMY (TURN CHAPEL)
- UKHO - INNOVATION DRIVING MARINE DECISION-MAKING
- MET OFFICE / EXETER UNI / LEP

Case study/exemplar (UK)

- NATIONAL OCEANOGRAPHIC CENTRE
- ↳ ROBOTICS CENTRE - SOUTH
- ORDNANCE SURVEY GEOSPATIAL

**POLICY LAB**

What does success look like?

Narrative **\*INNOVATION CENTRE\***

- INNOVATION CLUSTER - INC
- ACADEMIC INSTITUTIONS/COLLABORATIONS
- NEW HIGH VALUE JOBS / SKILLS
- INWARD INVESTMENT (DIGITAL)
- NEW START-UPS
- NATIONAL MARINE GEOSPATIAL DATA ASSETS
- CLEAN GROWTH

Visual image

Tweet or headline

**MARINE DECISIONS MADE EASY**

Industrial Strategy foundations Ho

Business Environment  
To be the best place to start and grow

People  
To generate good jobs and greater earning power for all

Ideas  
To be the world's most innovative economy



# Productivity foundations

Please explain scoring for foundations here:

COLLABORATIONS  
KILLS  
(DIGITAL)  
TIAL  
CAN  
THIS  
(4)  
EASY

**Business Environment**  
To be the best place to start and grow a business

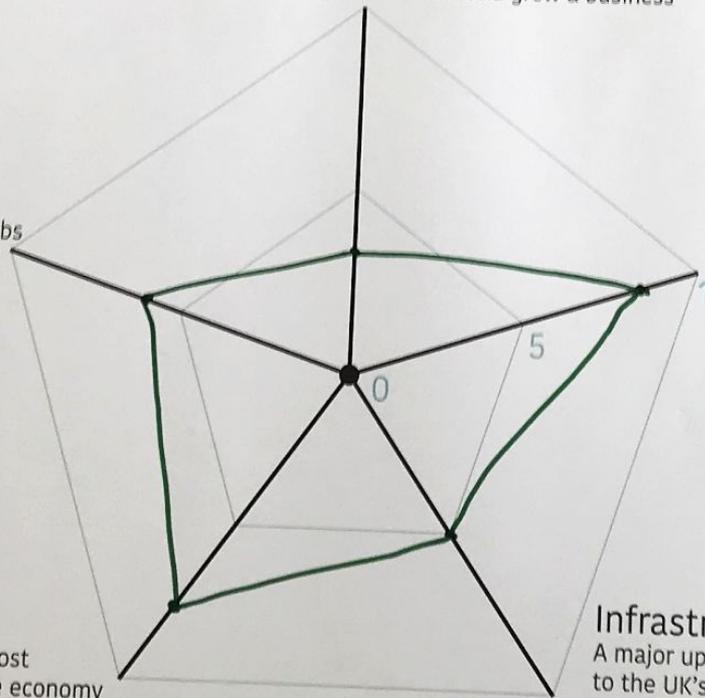
**People**  
To generate good jobs  
and greater earning  
power for all

**Ideas**  
To be the  
world's most  
innovative economy

**Infrastructure**  
A major upgrade  
to the UK's  
infrastructure

**Place**  
To have prosperous  
communities across  
the UK

0 = very poor  
10 = excellent



**Business Environment**  
WE DONT HAVE INFRASTRUCTURE  
FOR SCALE-UPS  
WE NEED A FOCAL POINT

**Place**  
UKHO / MET OFFICE / RN / PML  
MARINE AUTONOMY COMPANIES  
(80% ON SOUTH COAST)

**Infrastructure**  
- GOOD SEAWARD SIDE / POOR  
LAND + AIR + DIGITAL

**Ideas**  
SEE LOCAL EXEMPLARS  
REGIONAL UNIVERSITIES

**People**  
WE HAVE THE EXPERTS  
ALREADY WORKING ON GROWING  
OWN/ SKILLS DEVELOPMENT  
S.T.E.M PROGRAMME

Engineering  
Supply



# Objective 4: Health technology pioneer

Utilise cultural, business and community assets alongside expertise to help social isolation, early prevention and wellbeing healthcare

# Case studies

## Local:

- Digital upskilling through GPs
- Apps for supporting people with specific conditions - e.g. connecting arthritis sufferers to healthcare providers

## UK:

- Wearable tech that detects heart events 48 hours before
- Babylon health - online doctor consultations

## International:

- Apple health tech developers



# Vision for success

## Headline: Excellence and wellness, tourism and culture

- Harnessing the mindset of the youth for innovation and social purpose
- Development of healthtech testbed
- Develop APIs to prolong life and monitor workers
- Prevention of problems with personal touch
- Diversity of area (rural, urban and coastal) needed to be considered



