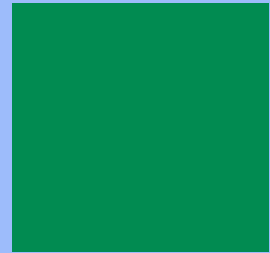
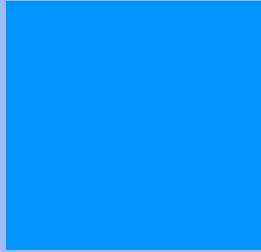




The Gloucestershire Economic Strategy
2008-2015
Final Consultation Draft



Key Achievements

Since the launch of the Gloucestershire Economic Strategy 2004 - 2014

Gloucestershire County Council

The Audit Commission announced that Gloucestershire has become a four star council for the first time. The Comprehensive Performance Assessment has rated them an "excellent" council – the highest rating. They highlighted the transport policies, strong economic development, road safety, social care services for adults, educational achievement, emergency planning and partnership working.

South West Regional Development Agency assisted projects 'connect.glos' broadband programme

This programme distributed £500,000 to help local businesses make more profitable use of broadband and ICT. It exceeded all targets, trained over 300 County workers, and contributed towards a growth of £20 million in the County economy.

Gloucestershire Food Vision

Gloucestershire Food Vision (GFV) is the UK's first integrated countywide food policy framework, covering health, education, industry, access and food safety. GFV aims to make Gloucestershire the healthiest county in the UK in terms of what we eat and produce, and in the state of our food businesses and environment.

Gloucestershire Parklife Project and Skills Brokerage Model (SBM)

Over a 2 year period Parklife assisted 330 people in finding employment and 370 businesses to improve their performance, and SBM assisted over 300 people in skills development and supported 560 businesses with skills advisors.



Gloucester's Tall Ships Festival

As part of a business support programme involving Gloucestershire First Partners, a series of events was held to support tourism and the local economy. This included a four-day celebration of Gloucester and its maritime heritage. The first ever Gloucester Tall Ships Festival, in 2007, provided a rare opportunity to see the beautiful ships in England's most inland and historic docks.

Investor Support Programme

Since 2004 the programme has helped to create 342 jobs, safeguard 50 existing jobs, and attract £26 million in capital investment.

Rural Renaissance Programme

The £12m Rural Renaissance programme helped to create or safeguard 438 jobs, assisted 2,352 businesses, helped 2,638 people to develop their skills and supported 150 community/voluntary organisations.

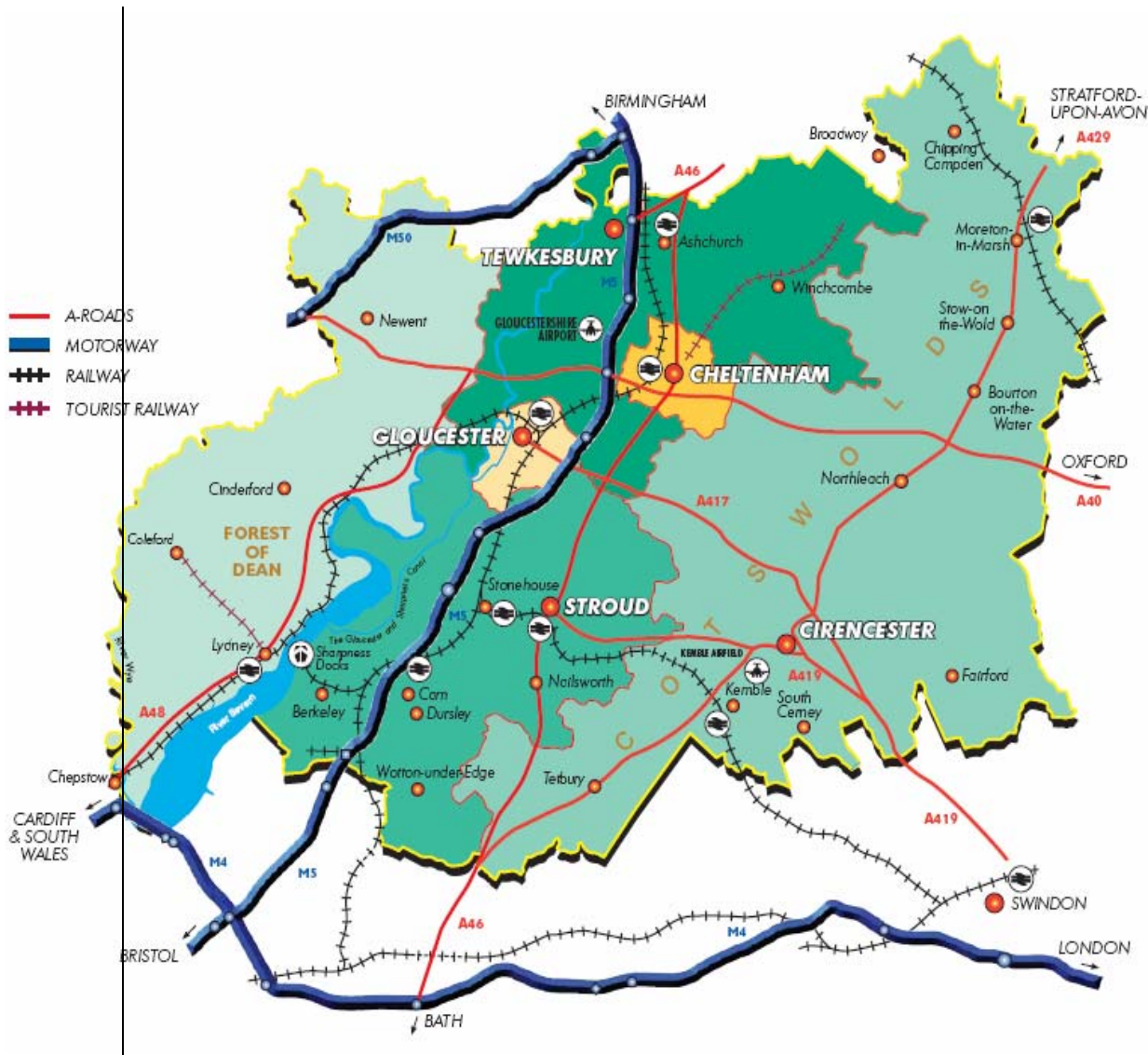
Cotswolds & Forest of Dean Tourism

New tourism websites were launched, including a highly acclaimed Japanese version, and visits by 375 UK and foreign travel journalists and film crew members were hosted. Tourism now adds over £750 million per year to the Gloucestershire Economy.



Contents	Page
Map of Gloucestershire	1
Introduction from the Chairman & Message from SWRDA	2
Economic Overview	3
Medium-term Economic Forecast	6
Consultation	6
Policy Context	7
Purpose of the Strategy	8
Structure of the Strategy	9
The Provisional Gloucestershire Economic Strategy	10
The Economic Mission	10
Strategic Objectives	10
• People	10
• Jobs	14
• Connectivity	16
• Development and Resilience	20
• Location	24
Summary	26
Glossary	27
Partnership and Resources	28
Appendices Summary	31

The County of Gloucestershire





Introduction from the Chairman

Gloucestershire is essentially a rural county, famed for the quality of life it offers, beautiful countryside, picturesque towns and villages, with the Cathedral City of Gloucester and the Regency Town of Cheltenham at its heart. Its rich industrial heritage has made the successful transition into a diverse and vibrant modern economy.

Gloucestershire First is the countywide multi-sector partnership tasked with the development and support of the economic wellbeing of the County. On behalf of its Partners it has co-ordinated the preparation of this strategy for the future economic development of the County to increase sustainable prosperity and productivity. It provides a strategic guide to the economic aims and objectives, as identified in consultation with Partners and other stakeholders. This Strategy has been adopted by the Partnership, and sets out the local priorities expected to be reflected in the strategies of other local organisations.

The Strategy is made up of three documents. The Economy of Gloucestershire 2006/07 produced annually by the GLMIU, provides the evidence base. This document, The Provisional Gloucestershire Economic Strategy 2008-2015, sets out the Strategy. The Delivery Plan will cover a rolling three years, and be produced annually to enable priorities to change during the lifetime of the Strategy.

Supporting note from the South West Regional Development Agency (To be inserted)

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque bibendum tellus eu nunc. Maecenas odio lectus, lobortis ut, tincidunt quis, egestas eget, lacus.

Aliquam ligula. Morbi neque lorem, mollis non, elementum in, pulvinar eget, dui. Praesent odio nunc, placerat eu, lacinia vel, tempus at, diam. Vestibulum enim nibh, rutrum ut, eleifend vitae, dignissim ac, sapienmauris.

The Sustainable Community Strategy for Gloucestershire, produced by the Gloucestershire Conference Partnership, describes a vision for the County. To deliver the economic pillar in support of this, our economic mission is:

“To maintain a sustainable economic environment in which businesses flourish, communities thrive, and individuals have the opportunity to reach their potential.”

There are five key themes in the strategy: People; Jobs; Connectivity; Development & Resilience; and Location; We aim to build on the progress made so far in these themed areas and to promote the role of partnership working as a major contributor to the economic well-being of the County.

We need to work together to continue to deliver economic success, protect our environment, maintain the high quality of life, and to address the barriers which prevent this success being shared by all.

Let’s work together to make Gloucestershire’s future one we can all continue to be proud of.

**Chas Fellows,
Chairman,
Gloucestershire First**

Economic Overview

Britain is facing a period of economic challenges, which are global in origin. Financial instability, high and volatile oil prices impacting on business and household fuel bills, and high food prices have changed the economic landscape. The global economic developments will impact on the skills and employment that the UK will require. The right investments need to be made in education, skills, science and infrastructure, and the remaining barriers to entrepreneurship and innovation overcome in order to equip those who live and work Gloucestershire for the future.



View across the Cotswolds

Covering an area of 2,650 sq. km (1,020 sq. miles), Gloucestershire is centrally located within the UK. It is within three hours travel of the areas which generate approximately 80% of the Country's wealth. The County has historically had comparatively low unemployment, above average educational attainment, and relatively good health. It is recognised as a good location for investment, work, learning, and all round quality of life.

According to the Office of National Statistics (ONS) the population is forecast to rise by around 4% over the period 2006 to 2016 to 600,600. This, combined with the need to replace jobs from shrinking employment sectors, means that around 25,000 new jobs are needed over the same period, and at least 56,000 new homes by 2020.

2006 ONS Sub-national population projections							
District	Population (in thousands)						
	2006	2008	2010	2015	2020	2025	2030
Cheltenham	111.5	112.6	113.8	116.7	119.9	123.4	126.9
Cotswold	83.2	84.6	85.9	89.2	92.6	96.3	99.7
Forest of Dean	81.7	82.5	83.4	85.7	88.0	90.5	92.8
Gloucester	113.2	114.9	116.8	121.5	126.2	130.7	134.7
Stroud	110.3	111.7	113.2	117.2	121.5	126.0	130.0
Tewkesbury	78.8	79.9	81.2	84.5	87.8	90.9	93.6
Gloucestershire	578.6	586.1	594.4	614.8	636.1	657.8	677.9

Note: Figures may not sum due to rounding. Crown Copyright 2007

A 2008 report by Eurostat predicts that around 25% of the UK population will be aged 65 and above by 2060, rising from 16% in 2008. The increasingly ageing population is partly due to an increase in longevity, an out-migration of younger workers, and an influx of affluent in-migrants mainly of, or near, retirement age seeking an improved quality of life. As the trend continues it will create an added pressure on public services.

The dramatic impact of extreme weather conditions on the County was widely publicised in 2007, and highlighted our socio-economic dependency on the utility services and transport infrastructure. Work to address the economic causes and multiple effects of climate change should be a priority, including improved water management and flood defences. The Provisional Gloucestershire Economic Strategy (GES) has synergies with a sister strategy, the Gloucestershire Sustainable Energy Strategy, which encourages the switch to sustainable energy sources and addresses, in more detail, measures to reduce and adapt to climate change, possible future energy shortages, security of supply, and

price increases. The GES does not seek to reproduce the content of the Energy Strategy here, but supports implementation of the recommended actions.

Many County residents are currently highly dependent on the use of cars, and traffic congestion is predicted to rise dramatically during the period to 2015, unless action is taken. An effective integrated public transport network will help to reduce both congestion and transport associated carbon emissions. We need to ensure that planning and development control policies, and employers and developers, take access to public transport into account. Weaknesses in road and rail connectivity, particularly to London and the South East, should also be addressed for the County to fulfil its economic potential.

Carbon emissions from business activities, including manufacturing and retail distribution, continue to rise. More work is required to educate and assist businesses to conserve energy, lower their dependence on fossil fuels, and reduce their carbon footprint.

Growth in real GDP for world and selected advanced economies				
			Current projections	
Annual % change	2006	2007	2008	2009
World	5.1	5.0	4.1	3.9
China	11.6	11.9	9.7	9.8
India	9.8	9.3	8.0	8.0
USA	2.9	2.2	1.3	0.8
UK	2.9	3.1	1.8	1.7
Japan	2.4	2.1	1.5	1.5
Euro area	2.5	2.6	1.7	1.2

Source: World Economic Outlook July 2008 International Monetary Fund

We should continue to develop the key factors considered essential for competitiveness: economic diversity; a skilled workforce; good internal and external connectivity; strategic decision-making capacity; and innovative businesses and organisations. There are opportunities for lobbying and the forming of alliances with regional and sub-regional organisations to influence developments and activities outside the County boundaries. These include plans to harness the energy potential of the River Severn, and the making of improvements to transport infrastructure.



The High Street in Cheltenham

Advances in ICT have helped to speed the expansion of national and international markets in goods and services and our local economy is increasingly influenced by economic events around the world. Strong economic growth in China (projected at over five times that of the UK by 2008) and India has affected the UK and other advanced economies, and this trend is expected to continue. We need to encourage County businesses to improve productivity and compete in the wider marketplace, through measures such as greater

engagement with sources of advice and training, and the development of business networks.

Within our key employment sectors, the Distribution sector employs the highest number of workers, and the already large Public and Care sectors are growing rapidly. The County is also a major centre for banking, insurance and business services and home to a number of government departments including GCHQ, the UK government intelligence centre. The urban heart of the County contains the major retail centres of Gloucester and Cheltenham which are of both local and regional importance.



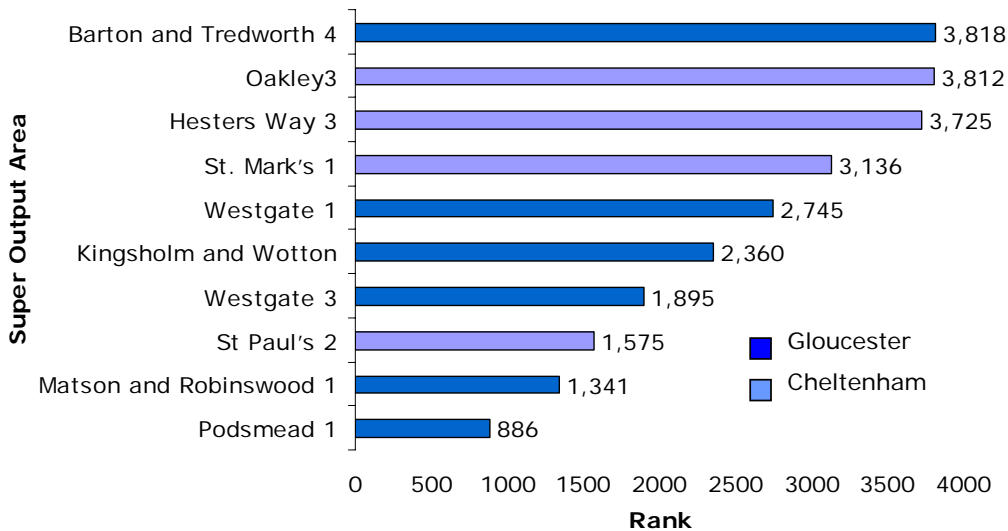
Manufacturing at Messier Dowty in Staverton

Based on a historic concentration of defence and aerospace contractors, there is a larger than average (but shrinking) manufacturing base, with a particular strength in advanced engineering. These and many other employers have been attracted by Gloucestershire's advantages as a location both for business and residence, and the skills of a highly qualified workforce.

The County contains large areas of outstanding natural beauty and many popular destinations which support a thriving tourism industry. These range from vibrant urban areas including the Regency town of Cheltenham and historic City of Gloucester, to the attractive market towns and villages of rural Gloucestershire. Farming and agriculture shape much of the rural landscape and food production is an important activity. Encouraging year round tourism and increased visitor spend are key factors in sustaining jobs. This can be achieved partly through the development of a broader range of attractions, including festivals, around the County and increasing the number of visitor overnight stays.

Some areas have relatively low job density per head of population at the same time as low unemployment, for example the Forest of Dean has a level of 0.6 (6 locally based jobs for every 10 workers). This indicates a high level of out-commuting to work. The Forest of Dean has been designated as a 'lagging area' by DEFRA. The creation of more local employment opportunities is needed to secure more sustainable economic growth.

Top ten most deprived Super Output Areas* in Gloucestershire



Source: ID2007, Social Disadvantage Research Centre, University of Oxford, Dept. for Communities and Local Government. Notes: Out of 32,482 English SOAs, where 1=most deprived. *see appendices for definition

The County has pockets of relative deprivation (in both urban and rural areas) and some of the associated problems, such as crime, long-term benefit dependency, lower educational achievements and health issues. More support is needed to help hard to reach groups to contribute to the economy and the LAA will play an important role in delivering the measures needed.

The issues identified by this Strategy should be addressed through the co-ordinated actions of partners and other organisations as detailed in the associated Delivery Plan, and through the Rural and Urban Economic Strategies.

Medium-term Economic forecast

The volatility in the global economy resulting from the US 'sub-prime' collapse and ensuing tightening of credit has created a consequent loss of confidence in equities culminating in a slowing of the US economy and a stock market collapse in January 2008. This volatility makes economic forecasting uncertain over the next few years.

Figures show that the UK economy remained buoyant for a long period up to the end of 2007 which seems to indicate that although confidence is waning, real activity is strong. However, the recent downturn in the housing market, reduced consumer spending and changes in lending practices may finally have a negative impact on real activity.

Gloucestershire not only reflects the national picture but outperforms the UK in terms of productivity. However, forecasts for the South West region point to a slowing of economic growth by around minus 1% for the period 2008/09 followed by a return to present trends. In light of the recent changes outlined previously, this forecast may well be very much on the conservative side.

A slowing of economic growth is likely to have a negative effect on the export and discretionary spending areas first. In respect of the industrial sectors, the present weakness of the US dollar may cause upset in the Advanced Engineering sector supply chain. The Retail and Catering sectors are also vulnerable in terms of high exposure to fluctuating consumer spending, and a continuing rise in fuel and energy prices will impact on all sectors.

The outcome will only become evident from 2008 figures relating to the housing market and employment figures and will indicate whether this is more than just a temporary slowdown. In the meantime there is still a need to continue to actively improve Gloucestershire's business potential in terms of its structure and productivity growth.
(Economy of Gloucestershire 2008)

Consultation

The GES has been developed following consultation with partner organisations, and guidance from the Economic Strategy Advisory Panel, whose members are drawn from the public and private sectors and the Third Sector. In Autumn 2007 over 600 organisations and individuals were invited to a stakeholder consultation event, at the University of Gloucestershire. The aspirational ideas and practical input generated at the event were prioritised by the stakeholders and have been distilled down and, taking a pragmatic approach, the deliverables drawn out. There has been further specialist and

advisory input, and another consultation exercise carried out with over 400 individuals and organisations in Spring 2008. The GES was adopted on a one-year provisional basis in late April 2008 and will be refreshed by mid 2009. The Strategy has been appraised by Sustainability South West.

Policy Context

Unless otherwise stated, this Strategy follows the principles of environmental sustainability and social inclusion, and refers to policies and activities within the geo-political boundaries of the county of Gloucestershire.

The GES is largely an 'umbrella strategy' enabling the delivery of the Regional Economic Strategy (RES) in Gloucestershire through a range of local strategies, including the Urban and Rural Economic Strategies. The timeframe has been set to co-ordinate more usefully with the RES. It is set within a framework of links and synergies with various other strategies and policies, but this does not preclude the need for new ideas to be embraced and new solutions sought. (A selection of key documents are listed later in this section, and in the appendices.)

The Sub-national Economic Development and Regeneration Review of 2007 gave Local Authorities responsibility for both economic development and environmental sustainability, encouraging the pursuit of sustainable economic development. It gave better incentives for achieving growth and for ensuring that disadvantaged areas both benefit from, and contribute to, economic development.

The key national and international influences are reflected within the regional level strategies, which in turn inform the County strategy. The list of influential and contributory documents includes:

At County level;

The County strategies and policies which have synergies with this document include:

- The Community Strategies and District Housing Needs Assessments
- The Local Area Agreements (LAAs)
- The Local Development Frameworks (LDFs)
- The Rural and Urban Economic Strategies
- The Gloucestershire Energy Strategy
- The Second Local Transport Plan (LTP2)
- The Gloucestershire Workspace Policy Framework
- Gloucestershire Food Vision
- The Present and Future Role of Gloucestershire Airport

At Regional level;

The Regional Economic Strategy 2006-2015 (RES) and Regional Spatial Strategy 2006–2026 (RSS), and the developing Regional Energy and Innovation Strategies.

The Regional Priorities reflected in the Gloucestershire Economic Strategy are:

- Managing the implications of population change
- Successful and competitive businesses
- The rapidly changing industrial and employment mix

- Energy, use of resources and climate change
- Technological and other knowledge dissemination
- Enhancing our environment and cultural life
- Strong and inclusive communities
- An effective and confident County

Purpose of the Strategy

This Strategy provides a framework to secure continuing sustainable growth and prosperity for the 7 years from 2008 to 2015. This period has been selected to better co-ordinate with the development cycles of the RES and RSS. The GES was adopted on a provisional basis for a one year period to allow for changes in key documents including the RSS, RES, and the Urban Economic Strategy. It aims to create the conditions that enable businesses to be more successful by increasing their productivity, and encouraging a low carbon, high resource efficiency approach to doing business.

Economic growth, by definition, means more material wealth – usually more wealth for individual consumption and more to spend on public services and utilities. Growth does not guarantee happiness but, given the chance, most people want a more financially secure and comfortable life. Economic growth can increase the range of opportunities available to our residents for fulfilling their potential. The public sector's economic role includes building the foundations that will let the skills inherent in the public, private and Third Sectors benefit our communities, and to ensure that entrepreneurship thrives.

National, sub-national and certain other issues may involve a lobbying role as wider issues cannot always be addressed solely from within the County. The Strategy provides a link between the local, sub regional and regional strategies and identifies our local economic priorities. The Delivery Plan is a tool to measure progress against targets, identify lead partner organisations and common goals, and is instrumental in attracting external funding. It also draws together the key actions of partners and provides a unique and useful overview of economic activities within Gloucestershire.

The purpose of the Strategy is also to guide the development of Gloucestershire as a County that has:

- Strong, sustainable and low carbon economic growth and prosperity
- An appropriately educated, versatile and skilled workforce
- Attractive, appropriate and accessible employment opportunities for all
- Excellent national and regional transport links
- Good local infrastructure, regional links, and public transport, enabling convenient and affordable movement into and around the County
- High quality communication services, enabling the accessing and distribution of information both nationally and internationally
- A rich cultural heritage and diversity, and an outstanding natural environment, in which people want to live and work.

Structure of the Strategy

The Strategy, contained within this document, has been based on a new model and differs from the preceding edition in that it has a greater focus on high level strategy, is more concise, and will be accompanied by a detailed delivery plan. The GES is now one element of a suite of three closely interlinked documents;

- **Part 1 - The Economy of Gloucestershire**

This publication provides the key evidence base, and contains the facts and figures on the County economy. It is compiled from a variety of reliable sources, including the South West Observatory, Dept. for Business Enterprise & Regulatory Reform, Office for National Statistics, Census Statistics, and the Audit Commission. New editions will include more interpretation of data and prediction of future trends. It is published annually by the Gloucestershire Labour Market Information Unit (GLMIU).

- **Part 2 - The Provisional Gloucestershire Economic Strategy**

This Strategy highlights the key issues within Gloucestershire that need to be addressed, and sets out a shared view of how the sub-regional economy is likely to change in the future. It identifies, at the County level, the key priorities for action and the key related policy and strategy documents. The strategy is complementary to the more detailed Rural and Urban Economic Strategies, is produced on behalf of the Partners by Gloucestershire First, and revised on a three-yearly basis.

- **Part 3 - The Economic Strategy Delivery Plan**

This plan details the actions which need to be taken to achieve the objectives set out in the Strategy, including the timescales, and identifies the lead partners. It also includes the key actions from the Urban and Rural Economic Strategy delivery plans. The plan is revised annually and covers a rolling three year period.

Copies of these documents can be obtained by download from the Gloucestershire First website at www.glosfirst.co.uk or by contacting Gloucestershire First on 01242 864190.

The Provisional Gloucestershire Economic Strategy

The Economic Mission

Demographic, technological and global changes present huge challenges and great opportunities. This Economic Strategy aims to build on our strengths, and address deficiencies and short term problems. It is important to focus on productivity-led growth within environmental limits, rather than purely employment-led growth, and to identify the longer term programme to help deliver the economic pillar of the Sustainable Community Strategy for Gloucestershire (SCS) The SCS vision states that:

“We want Gloucestershire to be a place where:

- the actions we all take today mean that Gloucestershire remains a great place to live and work, and*
- we do not compromise the quality of life for future generations.”*

Within this context the economic mission for the GES is:

“To create and foster a sustainable, low carbon economic environment in which businesses flourish, communities thrive, and individuals have the opportunity to reach their potential.”

Strategic Objectives

The economic strategic objectives and associated actions identified are described in more detail on the following pages. They fall into five main themed areas:

- People p10
- Jobs p14
- Connectivity p16
- Development & Resilience p20
- Location p24

People

Gloucestershire currently enjoys relatively high levels of employment and sustained economic growth, but in the near future there will be fewer jobs for those without at least basic skills, and a growing demand for vocational and higher level skills. The County population is forecast to rise by around 3.9% over the period 2006 to 2016 and will increase the need for services including education and training, and the number of jobs. The Local Area Agreement details a number of economic outcomes which the GES aims to support, and includes the aim to increase the number and range of skilled employees by improving the skills of local people.



Royal Forest of Dean College

To be successful in the 21st century we should continue to develop an economy based on the use of creative ideas, on the skills capable of transforming the ideas into practical applications, and on the skills required to make them commercially viable. We have several important strengths: a good higher education system where more people than

ever are studying for degrees; good reforms on vocational training; an increasingly effective school system; and a strong record of improvement.

The Leitch Review of Skills (2006) states that: *“The case for action is compelling and urgent. Becoming a world leader in skills will enable the UK to compete with the best in the world.”* Leitch recommends that the UK aims to move into the top eight in the world ranking in each skill level by 2020.



The new Gloucestershire College Campus

Continuing to expand higher and further education is critical to becoming a high skill economy, as internationally the UK skills base compares poorly. According to Leitch, the UK spends less on management training than any other country in Europe, and the proportion of adults in the 25-64 age group with low or no qualifications is more than double that of many of our competitor countries.

We need to foster enterprise, innovation and aspiration in our community, and support the Learning and Skills Council (LSC) and the Department for Children, Schools and Families in achieving their aim of helping all those of working age in the County to attain a standard and qualification of at least educational level 2.

Training needs to continue its transition to a demand-led system. The range of content and delivery methods should continue to develop, to be convenient for people already in employment as well as for those in full time education or training. Further strengthening the liaison between education and training providers and businesses will help to ensure that provision is appropriate to current and future business needs. Continuing work should be done to support the provision and take up of vocational and intermediate skills, and on increasing the proportion of adults holding a degree.

The Green Paper called Raising Expectations (DfES, 2007c) proposes that, from 2015, all young people should be required to participate in some form of education or training until they reach the age of 18. Work will continue on reducing the proportion of working age County residents without any qualifications which reflect economically valuable skills.

Generally the number of apprenticeships available had reduced for various reasons including the decline in the industrial and manufacturing sectors. The Government's Draft Apprenticeships Bill 2008 aims to ensure that 20% of young people are offered a suitable apprenticeship place, but more action will need to be taken to increase the number of apprenticeships, and work placements, successfully completed. Activity in the county includes a SW RDA Aerospace Training SW project looking at skills delivery in the industry, and GE Aviation has been developing a new apprenticeship scheme.

Identifying the key influences on young people should enable more effective interventions to be targeted in the future. The change in aspirations should begin in both primary and secondary level schools so that a higher proportion of young people are encouraged to stay on in education or to enter training.

There is a critical need for schools to ensure that all pupils with the capability leave with at least the necessary basic skills, including numeracy, and that a very high proportion achieve 5 GCSEs (or equivalent) at grades A* to C.

The attitudes and aspirations of young people will shape the workplaces of the future, but new workers make up a relatively small proportion of the current workforce. The Leitch Report states that over 70% of our 2020 workforce have already completed their compulsory education, and the continuing development of the existing workforce is therefore essential to our economic success. Employers should also be encouraged to benefit fully from the experience and transferable skills of older workers.

Some research on the effects on the County economy of the influx of migrant workers has been done, and this can be used further to inform areas such as the demand for skills courses, schooling and housing. Publicly funded facilities such as libraries, schools and colleges should explore enabling public access to ICT during weekends and holidays, to particularly benefit disadvantaged groups, migrant workers, and people with restricted access to education and training via ICT.

Many of the major socio-economic challenges require innovation: new ways of addressing challenges that are resistant to traditional solutions. There is a need to re-engage people in employment through a variety of means including skills training, identifying opportunities for flexible and home working, and addressing problems such as loss of confidence. As part of a 'Back to Work Plan' benefit claimants will have a basic skills assessment and, if necessary, skills coaching, alongside mentor supported activity to help them overcome their challenges and find suitable, steady work.

Health and Care Services are part of the County's growing service sector, and provide considerable potential business and employment opportunities for local people, including social enterprises. Health improvement is not a result of health care alone, but also depends on education, lifestyle, housing, and the economic welfare of the poorest groups in society.

There are strong links between health related quality of life, economic activity and the accessibility of services. Good health can enable people to participate in employment, learning activities, and to use public services. Also, being in employment and accessing services can themselves contribute towards better health.

It is important that partners work with the health sector agencies to address health issues, as the economic impacts of ill-health on our community include:

- Direct and indirect medical, pharmaceutical, and care costs
- The cost of working days lost due to ill health
- The financial impacts on relatives who have to become carers
- Individuals and families who need to be supported by state benefits, council tax reductions etc.
- The costs associated with premature disability and death.

The Third Sector can play an important role by helping to drive up productivity and competitiveness; contributing to socially inclusive wealth creation and local neighbourhood regeneration; and in helping to develop an inclusive society and active citizenship. This valuable contribution should be built upon and expanded.

Strategic Objectives - People

P1 To increase the local appropriately skilled and adaptable workforce to meet the needs of employers and enterprise.

- Establish employer skills needs, and encourage continuous workforce development and skills increase, including management development

- Continue increasing the number and diversity of relevant local business courses to meet the changing needs of County employers
- Identify the economic impact and potential of in-migrant workers on the County economy
- Strengthen the effectiveness of public sector support for business skills development
- Encourage the retention of more graduates and highly skilled workers within the County
- Support and build on the work of the Education Business Partnerships
- Increase the number pupils at Key Stage 4, with the capability, achieving 5 GCSE's (or equivalent) at grades A* - C.

P2 To increase the number of employees reaching a minimum of a NVQ2 qualification.

- Strengthen the relationships between colleges of further and higher education
- Promote the culture of Lifelong Learning in all sectors
- Support the increase in range and content of training and education opportunities in both the public and private sector
- Encourage the transition to demand-led training and education systems and more flexible and convenient delivery methods.

P3 To encourage and support people in the 'potential workforce' to gain or improve their skills and contribute to the local economy.

- Identify the potential workforce and the barriers to their employment, and support the agreed actions to overcome them
- Reduce the number of people without basic skills
- Reduce the skills mis-match between the available job vacancies and the members of the potential workforce who might fill them
- Increase the availability, range and uptake of basic skills and vocational training schemes offered to offenders and ex-offenders
- Promote the wider adoption of flexible working practices and increase the availability of public ICT facilities and accessible business training opportunities.

P4 To increase access to services and quality of life opportunities in the most deprived communities within the County.

- Support the capacity of the Third Sector to deliver accessible opportunities in line with identified community needs
- Support Third Sector community initiatives through the commissioning of multi-year contracts aligned to LAA priorities

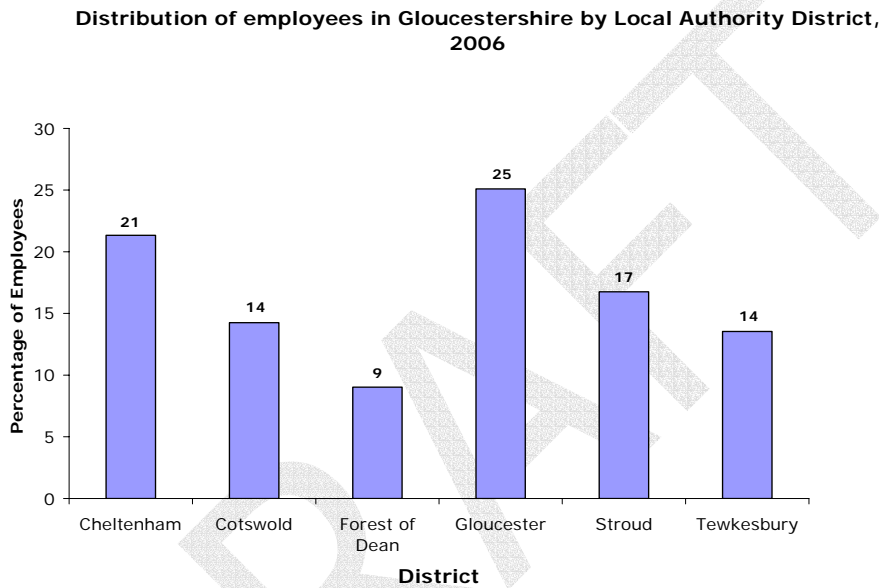
P5 To support addressing the issues of poor health where they limit participation in work, learning, and access to services.

- Encourage an increased emphasis on 'wellness' through measures known to minimise preventable illnesses developing
- Encourage businesses to promote healthy lifestyle choices to their employees

- Improve the capacity of services for older people in line with predicted demographic changes and service demands.

Jobs

The Economic Strategies aim to secure and build on opportunities for employment and sustainable economic growth, ensuring that all our communities are able to contribute to and benefit from the growing prosperity. The Local Area Agreement for Gloucestershire details a number of economic outcomes, which the GES aims to support, including the aim to increase the number and quality of jobs in the County.



Source: Annual Business Inquiry Employee analysis 2006 ONS Crown Copyright Reserved

Gloucestershire has a strong reputation for advanced engineering, but the County's manufacturing sector faces significant challenges due to a decline in its markets and severe competition from foreign business.

Further actions are needed to assist diversification into emerging services, new markets, and sectors with high output and growth. The environmental and sustainable energy sectors have real potential for high growth and there are future opportunities in the construction sector. These are linked to the planned increase in house building, as forecast in the RSS, and the changes associated with low/zero carbon buildings such as new skills, construction methods and materials. There are also many jobs linked with possible future work on exploring the energy potential of the River Severn and this should be investigated to give maximum benefit to the local economy.



Bourton-on-the-Water in the Cotswolds

Tourism has become the most important source of employment in the Cotswold District and was worth £778m to the County in 2006, supporting over 14,000 directly related jobs. Tourism brand clusters and the Destination Management Organisation (DMO) have been created to provide an effective and efficient way of marketing, managing and developing sustainable tourism, and increasing productivity and competitiveness. This will help to recognise the real worth of tourism jobs and encourage fair pay. Consideration must be given to the co-ordination of events and transport, and the need for a wider range of tourist and business visitor accommodation.

The relative health of the local population can have a major impact on the economy. The rapidly expanding Care sector and the increasingly ageing population offer opportunities to exploit the benefits of health sector-related employment and business. Social enterprise has the potential for a much greater role in delivering public services, particularly within the Care sector and with schemes to encourage longer term benefit claimants to return to paid employment. This can make a particular contribution in disadvantaged areas, as it increases the local retention of wealth.

Mitigation of and adaptation to the effects of climate change offer a number of opportunities: for the expansion or diversification of existing businesses, the establishment of new enterprises, training and skills development, and opportunities for improving business efficiency. The management of waste also has direct impact on the climate and economy. The County follows the standard 'Waste Hierarchy', and a municipal waste management plan and a commercial waste reduction project are in progress. The potential of these developments to support new jobs should be maximised.

Transport uses around one third of all energy in the County, and produces pollution. Residents should be encouraged to support jobs and businesses in Gloucestershire and reduce the number of HGV, 'food and shopping miles' by buying local produce and services from local outlets. These, and various other important energy-related opportunities including security and diversification of supply, are detailed in The Gloucestershire Sustainable Energy Strategy (GSES).



GCHQ – an innovator in employee transport management

Strategic Objectives - Jobs

J1 To identify opportunities to promote and support new and emerging wealth-creating businesses and industries.

- Work with the South West Regional Development Agency (SWRDA) to attract and retain valuable Foreign Direct Investment jobs
- Encourage the development of employment plans for each of the Local Districts
- Raise awareness and promote the availability of sources of business funding
- Exploit the opportunities for employment and training resulting from measures to address climate change and its effects.

J2 To maintain and strengthen existing key employment sectors.

- Support and grow a diverse economy, including the retention of profitable manufacturing and advanced engineering sectors, and other existing businesses
- Deliver the relevant actions arising from the Rural and Urban Economic Strategies and the Gloucestershire Energy Strategy
- Encourage measures to increase business productivity and sustainable growth, including flexible working practices where appropriate
- Encourage the further development of high growth sectors
- Encourage employers to benefit from the experience and transferable skills of older workers
- Promote awareness of the impact of 'food and shopping miles' and encourage residents to buy local produce and services from local outlets
- Assist businesses to reduce carbon emissions and mitigate the adverse effects of climate change.

J3 To encourage and promote cross-border trading

- Continue to encourage the best practise use of the Internet for business purposes
- Encourage the holding of events aimed at introducing buyers to sellers
- Promote the use of advisory bodies such as the UK Trade and Investment International Trade Services, and the Regional Language Network.

J4 To strengthen sustainable tourism in Gloucestershire.

- Support the Tourism sector in the event of extraordinary events (such as extreme weather conditions, livestock disease etc.) causing major adverse impacts
- Support the broadening of the tourism offer (attractions and accommodation) in the County, including encouraging attractions to extend their opening times, where appropriate, to expand the tourist season
- Market and raise awareness of the travel opportunities offered by public transport
- Encourage the better co-ordination of public transport services in support of major events such as festivals and other cultural and sporting activities
- Continue to measure, analyse and report on the effectiveness of tourism marketing campaigns, and carry out economic impact studies
- Use technology to provide 24-hour tourist information, in suitable public areas, and ensure Tourist Information Centres are open at key tourist times
- All of the above points are made in the context of ensuring sustainability of the local tourism economy - meeting the needs of the visitor, industry and community within environmental limits.

Connectivity

A high quality and energy efficient communications infrastructure within the County, and good linkages to the other regions and London, are key elements in delivering economic well-being and regeneration. Good connectivity, both physical and electronic, is vital to exploiting Gloucestershire's location, and an important element supporting economic resilience. Technological developments are advancing at an incredible rate, dramatically

altering the way we work and live. Our connectivity should be under constant review and incorporate new technologies as appropriate.

It is anticipated that transport costs, as a proportion of income, will rise significantly over the next few years. This is likely to result in more people needing to use public transport, therefore policies should lead to an enhancement of travel opportunities available via public transport. Our transport system also needs capacity in line with the level of development set out in the regional spatial and economic strategies, and the LDFs.

Gloucestershire has no regular international scheduled passenger flights from its local airport, and no direct rail services to existing major airports. Birmingham International Airport is accessible by the M5/M42, but Bristol International Airport has poor road access. Heathrow is over an hour away by road or rail.



Gloucestershire Airport has too short a runway for large aircraft but is home to air taxi and private jet facilities which help to attract inward investment and some high spending visitors. Over 250 different destinations are served by the Airport, the vast majority of flights being for business, corporate and training purposes, including visits to the European offices of companies with local bases. Airport related and co-located businesses are also significant local employers.

However, careful consideration must be given to minimising the environmental impacts of flights, and the Airport has committed to the UK Sustainable Aviation Policy and is introducing its own 'Green Policy' in 2008.

A general move away from the use of the private car in favour of public transport would help reduce peak congestion problems which in turn would benefit essential car users, public transport and the road freight industry. Rail freight links to Europe and beyond, through the Channel Tunnel and by sea using short sea coastal shipping via Sharpness Docks, could be further exploited to provide more sustainable freight solutions. The County should build on the work of the Gloucestershire Freight Quality Partnership to stimulate rail freight.

Gloucestershire has generally good rail links to Birmingham, the North of England, Bristol and the South West, and to Nottingham and Cardiff. There are, however, capacity constraints on the Bristol to Birmingham rail corridor which limit the ability to expand freight and passenger services and, more significantly, offer additional station stops.

The rail link to London and beyond is a particular weakness in connectivity, due to the single track between Swindon and Kemble in the South of the County. This section should be re-doubled to enable services to Swindon and London to be



Cycle Parking at Cheltenham Spa

enhanced. This will in turn enhance connectivity with London and is key to attracting inward investment and ensuring that employment opportunities keep pace with the additional housing allocated in the RSS for Cheltenham and Gloucester. The scheduled redoubling of the North Cotswolds Line will allow for an hourly service to London from the Northern end of the County.

Work and travel patterns need to continue evolving; e.g. we must increase the spread of flexible working times, the intelligent use of ICT to eliminate some journeys, greater use of public transport, car/lift share schemes and remote and flexible working, as these will all help to reduce the impact of transport activities. Cycling, walking, the use of car sharing schemes and public transport should continue to be promoted. Park and Ride sites are successful in helping to reduce urban congestion and further sites should be considered, along with circular rather than only single point to point services.

The M5 and the M4 provide fast road links to Birmingham, Bristol, Cardiff, London and the South East of England. Currently, junction 10 of the M5 does not have full multi-directional access and there is growing pressure for this to be lobbied for and rectified. The A40 provides a good link to Oxford, as does the A46 to Bath. However, the route to the M4 via the A417/419 has a notorious bottleneck and accident hotspot where numerous casualties occur. Further research work is needed to evidence the economic impact of improvements to the A417/419 in the Nettleton Bottom/Air Balloon area before a solution can be agreed with the Highways Agency and other parties. The A48/A40 junction at Highnam is another congestion point. Major road improvement works have been carried out there during 2008 with the aim of reducing congestion in the short to medium term. The road access to Chepstow and Monmouth from the Forest of Dean is often congested and opportunities for collaborative solutions should be explored with Monmouthshire Council.



The Queen Boadicea at Gloucester Docks

Sharpness Docks are suited to short sea coastal shipping. The regeneration of Gloucester docks and quays is underway, which will have a very positive economic impact in terms of jobs and tourism.

Internally, the connectivity challenges are: to exploit the potential of broadband to new businesses, particularly in the more rural locations; expand the markets of existing businesses and increase flexible and home working; to provide public

transport that becomes the 'option of choice' for the majority in getting from home to work; and to increase the potential for safe cycling, particularly in the Severn Vale.

ICT is a major contributor to the County's prosperity. There are still a few very small pockets around the County with poor or no broadband service, and wireless solutions should be promoted where suitable. Internet connectivity should be considered in both the allocation and selection of suitable workspace. Further work is required to help the smaller and independent businesses which are still not yet making the most of the benefits of modern ICT, including video conferencing, Voice over Internet Protocol, blended and e-learning. New and knowledge based technology products can provide jobs, create an entrepreneurial culture, and help to reduce the need to travel.

Planners, architects and builders need to take electronic connectivity into account when considering new building developments. It plays an important role in making life more sustainable particularly in rural areas, for example by facilitating home working, and can help to combat social exclusion and improve access to services. The challenge of places

still experiencing poor levels of broadband service needs to be addressed for those districts to be able to create more local employment and encourage higher levels of flexible working. Partners should also promote the finding of solutions to the long standing problem of poor broadcasting signals in certain areas such as the Stroud Valleys and Forest of Dean, and support the smooth roll out of digital broadcasting services across the County.

Strategic Objectives – Connectivity

C1 To improve international and national connectivity

- Ensure good access to strategic road and rail routes
- Maximise the economic potential of new development opportunities, including those at Sharpness and Lydney Docks, Gloucester Docks and Quays, the Cotswold Canal and the River Severn
- Lobby for the re-doubling of the Kemble to Swindon rail line
- Improve the connectivity of the Forest of Dean
- Lobby for better access to Bristol International Airport
- Exploit the business travel potential of Gloucestershire Airport
- Encourage the wider development and use of video conferencing facilities, with the public sector setting a leading example.

C2 To identify and agree solutions to the road and rail capacity issues in the County.

- Encourage and support measures to eliminate the need for travel
- Agree and support a solution to the A417/419 strategic road link problem at Nettleton Bottom/Air Balloon area
- Address the chronic congestion problem at the A48/A40 road junction at Highnam
- Liaise with Monmouthshire Council to explore solutions to road congestion points on the Wales/Forest of Dean borders
- Lobby for multi-directional access at junction 10 of the M5 and for improvements at road junctions where large-scale new building developments change access requirements
- Lobby for the re-doubling of the Kemble to Swindon rail line, and the enhancement of services to Swindon and London.
- A strategic review of the Bristol to Birmingham rail corridor to ensure best use is made of the limited capacity
- Ensure County roads are maintained to a good standard, enabling cyclists and other road users to travel safely.

C3 To promote and encourage the switch to more sustainable ways of travel.

- Enable the development of integrated passenger, freight and distribution hubs
- Encourage businesses and public sector organisations to provide facilities and incentives to encourage car and lift sharing, cycling, walking and travel on public transport by their staff
- Encourage businesses on business parks to work together to reduce single occupancy car commuting

- Promote community car share schemes, with allocated parking areas as appropriate
- Encourage the development and local supply of appropriate alternative transport fuels and technologies
- Promote the smarter use of technology such as tele and video conferencing, and flexible working to reduce travel needs.

C4 To ensure Gloucestershire has a quality public transport system that meets the needs of its citizens, visitors and businesses, in a safe and sustainable way.

- Deliver a strategic integrated public transport network including a quality bus system to appropriately serve residential and employment centres, and key public amenities such as hospitals.
- Review and improve the provision of transport information including marketing, signage, maps and use of newer technologies.
- Ensure that vehicle 'whole of life costs', including alternative fuel options, are considered when buying publicly funded vehicles.

C5 To ensure that County businesses are able to maximise the benefits of broadband and ICT.

- Work with Partners and suppliers to encourage the provision of TV/radio broadcast and broadband service in 'dark spots' and areas with particularly low bandwidth availability
- Promote the business benefits of high speed internet access and provide or signpost effective ICT business and security advice, support and training
- Encourage scalable bandwidth supply to major regeneration and new build sites, business clusters, and mixed use developments
- Establish the importance of internet connectivity and bandwidth with inward investors and expanding local businesses as a key part of the investor services offering
- Investigate the costs and benefits of introducing local wireless networks into urban centres, market towns, and local business centres.

Development and Resilience

In addition to carrying out highly skilled work in the future, the UK needs its businesses to compete by producing more unique and innovative products and services than other nations. Manufactured goods and services are traded across the world, and we increasingly rely on our business community's capacity to innovate and drive economic growth. Our strong educational base produces many highly skilled graduates with potential to utilise cutting edge technology and innovation. Clusters of industries which provide business to business best practice and procurement opportunities should be encouraged.

It is recognised that in some specific areas it may currently be uneconomic to carry out major commercial property refurbishments. However, there is more generally a continuing need for appropriate employment land, with good communication links and workspace that encourages the creation of job opportunities. This enables existing local businesses to expand, attracts new businesses, and the creation of new jobs. It is therefore crucial to the development of a sustainable local economy.

The future vitality and viability of our market towns is fundamental to achieving more sustainable development. These are centres of economic activity and provide essential services for the surrounding communities. Individual retailers cannot be protected against market competition. However, planning policies should aim to encourage the development of new facilities and safeguard the existing range of everyday community, shopping and employment opportunities. Work and travel patterns need to continue evolving and becoming more sustainable, including measures to reduce the need to commute at all.



Gloucester's Vibrant Outdoor Market

Climate change is predicted to cause damage due to extremes of weather including flooding and, conversely, drought. Recent events have emphasised the need to make changes in the way we farm, work, travel, and build and maintain property. Improvements in water management measures, including storage, forecasting, monitoring, and flood damage minimisation, should be encouraged and supported, and associated job opportunities maximised.

At least 20% of all Europe's energy needs must be supplied from sustainable sources by the year 2020. We need to focus both on incorporating sustainable energy technology into buildings and on reducing carbon emissions, which poses a challenge to architects, builders and planners. We need to get the balance right through a fully integrated and systematic approach. The opportunities for skills development, innovation, enterprise, and job creation should be fully exploited.



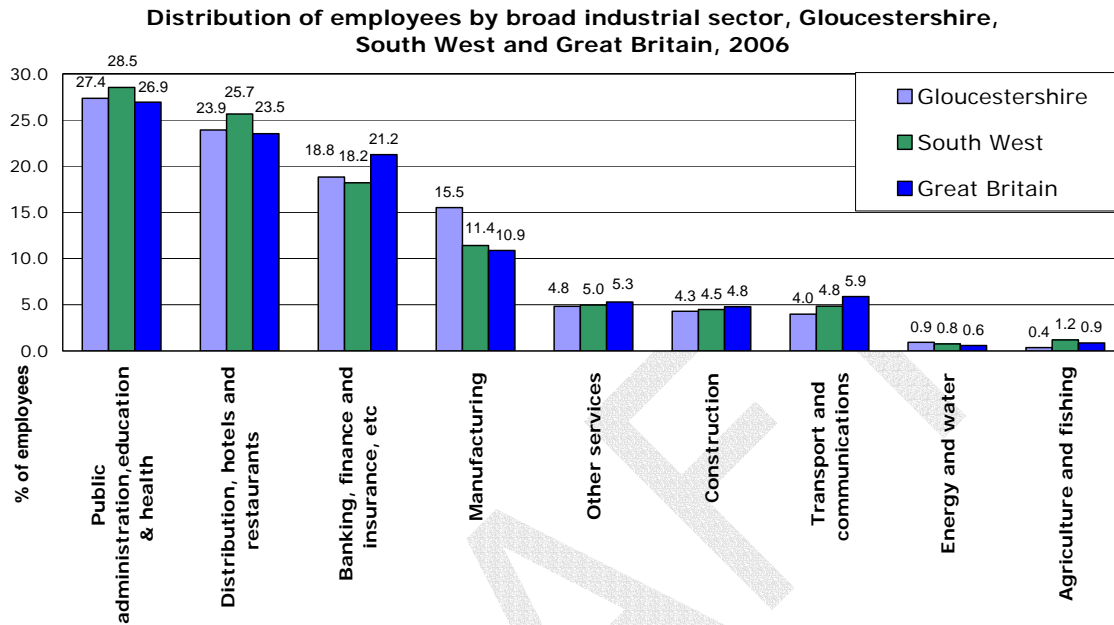
Oberthur Card Systems, Tewkesbury

The County's manufacturing sector, as elsewhere in the UK, is shrinking and needs assistance to diversify into emerging services, new markets, and sectors with high output and growth. There are opportunities to expand the environmental and energy related sectors, including in the development, installation and maintenance of sustainable energy sources.

In support of the GES, the Local Area Agreement aims to deliver on a number of economic outcomes, including realising the economic potential of Cheltenham and Gloucester, and the surrounding area. Tackling poverty and encouraging neighbourhood regeneration are among the key issues being addressed.

The Gloucester Heritage Urban Regeneration Company (GHURC) is guiding a comprehensive multi-site regeneration programme in Gloucester which will have a significant economic impact right across the County. The opportunities this offers need to be maximised and captured by local businesses, and the City Employment Plan will help to support local people into employment. Cheltenham Borough Council is engaged in the 'Civic Pride' programme of regeneration and improvements to the public realm.

The major canal restoration project in the Stroud District encountered funding difficulties but, if completed, according to a report commissioned by SWRDA and Stroud District Council, has the potential to generate up to 600 new jobs over a 10 year period. The new workspace and jobs are expected to help reduce the out-commuting from the district. Discussions have been held with businesses in the canal corridor with a view to assisting re-location as necessary.



Source: Annual Business Inquiry Employee analysis 2006 ONS Crown Copyright Reserved

Forest of Dean District Council (FoD DC) is working with English Partnerships, SWRDA and other partners in developing plans for a multi-site regeneration programme in Cinderford under the National Coalfields Programme.

Tewkesbury Borough Council is looking at potential regeneration projects in Tewkesbury town centre and the opening of a new Heritage & Visitor Centre took place in 2007. A Vitality & Viability Study is currently awaited for Tewkesbury, Winchcombe and Bishop's Cleeve. Cotswold District Council is guiding local regeneration work including a scheme for Cirencester town centre.

Strategic Objectives - Development and Resilience

D1 To increase the levels of business innovation and creativity, and foster a stronger entrepreneurial culture.

- Encourage the development of entrepreneurial networks, facilities for activities such as research, innovation, technologies and science, and signpost access to development finance
- Encourage the use of new processes and technology, on-site generation and use of sustainable energy to reduce carbon emissions
- Encourage stronger links and partnerships between business and higher education in support of developing a stronger culture of business innovation and entrepreneurialism
- Increase the interaction between the business community and primary, secondary, and tertiary levels of education

- Encourage networking and sharing of best practice.

D2 Accelerate the development of new commercial opportunities.

- Deliver the objectives of the Gloucestershire Workspace Framework including the development of business clusters and incubation units
- Realise the economic potential of the County through supporting the Urban and Rural Economic Strategies
- Investigate the opportunities associated with low and zero carbon construction of new buildings
- Support the increased use of Sharpness Docks.

D3 To increase business formation, growth and survival rates, particularly in the key wealth creating and high growth sectors.

- Ensure suitable pre and post formation advice and support is available to local businesses
- Ensure the provision of sufficient suitable land and workspace, including small business units and incubation space.
- Promote the adoption of best business practice and use of ICT
- Maximise the economic potential of regeneration programmes.

D4 To Increase business and community confidence by reducing crime, the fear of crime, and anti-social behaviour.

- Work with local businesses, schools and colleges, youth groups and services, the Police Authority, and local Crime and Disorder Reduction Partnerships to identify priorities for action
- Seek opportunities for businesses to collaborate with schools and colleges on initiatives to reduce crime and anti-social behaviour
- Explore the expanding role of other appropriate community organisations in this area.

D5 To support and encourage measures to increase business resilience.

- Promote measures to support business resilience, including business continuity and recovery planning, particularly in rural and flood risk areas.
- Work with partner organisations to encourage improved water and energy management measures
- Encourage local businesses to understand and manage the risks associated with climate change and energy consumption
- Liaise with the Local Resilience Forum on economy related issues
- Assist in maximising the economic benefits of associated job opportunities.

Location

At the Northern tip of the South West Region, Gloucestershire borders six other counties. This position at a crossroads of trade routes gives us strong advantages as a business location, however there are still improvements to be made with the main road and rail routes to London, and in tackling current and future congestion hot spots.

Gloucestershire does not qualify for the financial incentives for business relocation which are available in some other parts of the UK, and so needs to be more proactively and effectively marketed. Both the Forest of Dean District Council and Gloucester City Council are working on plans for marketing their districts as good business locations. It is also important to counteract the negative impact of the nationwide media coverage of flooding and the risk of further floods. A multi-agency group including Local Authorities, the Environment Agency, water companies and drainage authorities has been set up to co-ordinate work on flood prevention issues. Initially the focus will be on analysing flood sites, with the aim of prioritising responses and co-ordinating actions between partners.



Vantage Point Business Village in the Forest of Dean

A balance should be achieved between the distribution of jobs and housing through the creation of suitable mixed use developments. These should be built whenever possible on brownfield sites, but identifying new sites and reassessing land supply should be ongoing. Not all industry is suitable for mixed use sites, so sensitive and careful planning and zoning are required to meet the more specialised needs. Detailed planning is provided by each of the Local Authorities in the LDFs.



Stroud Café Culture

The Regional Spatial Strategy (RSS) directs the bulk of new housing development to 'strategically significant cities and towns' – two have been designated in the County; Cheltenham and Gloucester. The RSS also acknowledges the role of development in the market towns, and smaller towns and villages, in both cases to be proportionate to their role and function. The RSS recommends an increase in the level of development, with a greater concentration on urban areas. Although mainly affecting the urban areas, the developments will have ramifications across the County.

Over the period covered by this strategy Gloucestershire will experience a growing demand for housing, there are issues around property prices, and long distance commuting which need to be addressed. There are training and employment opportunities for local people in terms of sustainable construction and future building maintenance which should be maximised. The use of local and renewable materials such as timber in construction can also help to create additional employment and address climate change. Local Authorities should set priorities for achieving decent homes standards and addressing the changing patterns of housing demand. The supply of affordable housing

is a key issue which will be addressed via LDFs and the Gloucestershire Rural Community Council (GRCC) is taking the lead in rural areas. Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council, in partnership with GCC, are developing a Joint Core Strategy of the LDF, where the key decisions will be made in terms of the location, timing and type of development to cover the period to 2026.

The County has an excellent, and growing, reputation for its cultural activities, including various festivals and sporting events. New viable events should be encouraged and the economic opportunities associated with major events such as the 2012 Olympic Games explored and exploited for local benefit.



Stroud Subscription Rooms

The development of business class hotels in the main urban centres, the growing 'café culture', and enhancements to the night-time economy will make these centres more vibrant environments.

Town and city centre management initiatives can be useful in resolving environmental, security and marketing problems, but can also address wider urban issues.

Strategic Objectives – Location

L1 To create and maintain vibrant and sustainable local centres.

- Promote stronger links between local goods and services, and local businesses and consumers
- Encourage the building of mixed use developments where appropriate
- Use planning powers to secure the provision of affordable housing stock
- Enhance a diverse range of businesses and services in local centres, fostering suitable development where required
- Co-ordinate investment, environmental improvements and the overall management of town centres through appointed Town Centre Managers or similar
- Invest in physical improvement measures such as CCTV, help points, and better urban and public realm design.

L2 To pro-actively market and promote the County as an excellent location for inward investment and existing business expansion.

- Maintain and grow an active programme of Inward Investment support activities
- Build on the work of the Investor Support Programme to identify and facilitate growth in successful investors
- Implement a pro-active and targeted business marketing campaign, particularly aimed at organisations in over-heated areas such as the South East of England
- Continue to encourage beneficial inter-business collaboration through schemes such as Parklife.

L3 To create a quality of life and a business environment that attracts and retains talented business entrepreneurs, innovative and creative thinkers, and academics.

- Enhance the leisure and cultural life in Gloucestershire
- Improve the public realm, to attract new businesses and visitors to the County, and encourage existing businesses and residents to remain.

L4 To further Gloucestershire's interests and priorities through proactive engagement in European and regional initiatives and decision making.

- Attract EU funding in support of County priorities
- Provide Gloucestershire input to EU policies and programmes
- Learn from best practice in Europe.

(Summary & a closing statement from GCC to be inserted when completed and approved.)

Glossary

Blended Learning	Combination of computer based and face-to-face learning
BT	British Telecom
DEFRA	Department for Environment, Food and Rural Affairs
FE	Further education
FoD DC	Forest of Dean District Council
FSB	Federation of Small Businesses
GCC	Gloucestershire County Council
GCHQ	Government Communications Headquarters
GES	Gloucestershire Economic Strategy
GHURC	Gloucester Heritage Urban Regeneration Company
GLMIU	Gloucestershire Labour Market Information Unit
GRCC	Gloucestershire Rural Community Council
GSES	Gloucestershire Sustainable Energy Strategy
GVA	Gross Value Added – used to estimate the value of goods and services produced in an economy
HE	Higher Education
ICT	Information and Communication Technologies
LAA	Local Area Agreements framework
LDF	Local Development Framework
LSC	Learning & Skills Council
LTP2	Local Transport Plan 2 nd edition
NVQ	National Vocational Qualification
RES	Regional Economic Strategy 2006 – 2015
RSS	Regional Spatial Strategy 2006 – 2026
SME	Small and Medium sized Enterprises
SOA (Super Output Areas)	A range of areas of consistent size, starting from a population of 1000, used to improve the reporting of small area statistics.
Third Sector	This term relates to the social economy, which embraces a wide range of community, voluntary and not-for-profit/social enterprise activities
VoIp	<i>Voice over Internet Protocol</i> - routing of voice conversations over the Internet or through other networks
Waste Hierarchy	The standard guide to the priorities for waste management – from the ideal of prevention, to reduction, re-use, recycling, energy recovery and, ultimately, disposal.

Partnerships and Resources

There is a 'family' of stakeholders, partners and organisations involved in the delivery of economic development activities in Gloucestershire. They need to work in partnership in order to build economic wealth and move us towards the strategic vision and support the partnership work as laid out in the Urban and Rural Economic Strategies plus associated delivery plans, and the LAA, to maximise the value of this work.

Subject Area	Lead Implementation Partners (non-exhaustive list)
Connectivity	The Highways Agency, Network Rail, British Waterways, Department for Transport, SWRDA, Local Authorities, BT.
Development & Resilience	Regeneration Partnerships, County and District Strategic Partnerships, Local Authorities, GF Social Economy Advisory Panel, GF Urban Economy Advisory Panel, The Gloucestershire Infrastructure Group, Business Link services, Jobcentre Plus.
Skills and Training	Learning & Skills Council Gloucestershire, Learning Partnership, Business Link services, University of Gloucestershire, FE and HE Colleges, Neighbourhood Colleges, Secondary Schools, Sector Skills Councils, Business Organisations, and Neighbourhood Partnerships.
Urban Challenges	County and District Strategic Partnerships, Local Authorities, Regeneration Partnerships, GF Urban Economy Advisory Panel, Gloucestershire Federation of Local Development Agencies, Business Link services, Jobcentre Plus, Business Organisations, and Neighbourhood Partnerships.
Rural Challenges	County and District Strategic Partnerships, Local Authorities, GF Rural Economy Advisory Panel, Gloucestershire Rural Community Council, Business Link, Market Town Regeneration Partnerships, The National Trust, Rural Issues Task Force.

Gloucestershire First Partners

Local Authorities

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

Private Sector

Gloucestershire Chamber of Commerce & Industry
CBI (Gloucestershire Branch)
Federation of Small Businesses
Key Business Sectors representatives

<i>Manufacturing/Engineering</i>	<i>Leisure, Tourism, Hospitality</i>
<i>Finance/Business Services</i>	<i>Adv Engineering/Aerospace</i>
<i>Food & Drink</i>	<i>Creative Industries</i>

Special Interest Groups representatives

<i>Small Businesses</i>	<i>Rural Issues/Agriculture</i>
<i>Engineering Supply Chain</i>	<i>Property Development</i>
<i>ICT</i>	

Other Partners

Learning & Skills Council Gloucestershire
Higher Education
Federation of Gloucestershire Colleges
Northern Arc Ltd.
Jobcentre Plus
South West TUC
Health Trusts
Gloucestershire Hospitals NHS Foundation Trust
Gloucestershire Round Table for Sustainable Development
Gloucestershire Rural Community Council
Gloucestershire Assembly
Direxions for Success Ltd.

Co-opted

Barton & Tredworth Developments
ACT Consultancy & Training
Community Enterprise
Community Organisations
Fair Play South West

Advisers

Government Office for the South West
South West Regional Development Agency
Gloucestershire Development Agency Ltd.

The Gloucestershire First Partnership

Gloucestershire First is the countywide, multi-sector economic partnership, tasked with the development and support of the economic well-being of the County. It has the economic remit for the Gloucestershire Conference (the County level Local Strategic Partnership) and, as the Strategic Economic Partnership (SEP) for the County, provides an important interface with the South West Regional Development Agency (SWRDA).

Gloucestershire First is tasked with co-ordinating the creation of the provisional Gloucestershire Economic Strategy and associated delivery plan, and works closely with key partner organisations at both regional and local level. The Gloucestershire First partners are listed in full on page 28.

The Partnership Mission Statement

"To enhance, through concerted action amongst partners, the development of a sustainable economic environment in which organisations, businesses and communities within Gloucestershire can flourish and develop: and which provides opportunities for individuals to contribute so as to achieve their greatest potential."

In pursuit of its mission, Gloucestershire First aims to:

- Understand the needs and expectations of existing and potential employers and investors
- Focus support on the needs of key business sectors
- Inform and influence the strategies and programmes of partners and organisations which impact the economy of the County
- Promote the economic potential of the County to existing and prospective employers and investors
- Identify, develop and facilitate community regeneration and wellbeing initiatives
- Encourage and facilitate partnership solutions

The guiding principles we continue to work to are:

- the need to encourage innovation
- the importance of added value
- the need to address socio-economic exclusion and equality of opportunity
- the desire for a more sustainable approach to development
- the need for a pragmatic approach to environmental protection
- the value of partnership working

As fundamental parts of the community, public sector, local business and Third Sector organisations all have key roles to play in identifying and addressing local regeneration issues, and in creating and maintaining a network of strong communities in which residents and businesses have pride and confidence.

Sustainability Statement

The Gloucestershire First Partnership is committed to making sure that the improvements recommended in this strategy are delivered in line with best practice with respect to sustainability. We understand sustainable development as being that defined by the Vision 21 organisation - *"Development that allows this generation to live well, without compromising the ability of future generations to live well."*

For further information on Gloucestershire First, including electronic copies of this and other strategic documents, please see www.glosfirst.co.uk

Printed on paper derived from recycled and sustainable sources.

The Provisional Gloucestershire Economic Strategy 2008 – 2015

APPENDICES

(List for information purposes. The full appendices will accompany the final, approved version of the strategy document)

The appendices provide a point of reference to a non exhaustive list of key strategic and policy documents which have a synergy with the provisional Gloucestershire Economic Strategy 2008 – 2015. The documents are broken down into three areas; county, regional and global/national. For each document, a web link is inserted to provide a further point of reference.

Contents

Figure A – Key Strategic and Policy Documents

1. Key County Documents
2. Employment, Skills and Sector Development Policies
3. Regional Context

Table A – Comparison table of RES and GES Strategic Objectives

Table B – Housing Market Areas: Totals and Phasing

4. Key National Documents
5. Key International Documents
6. Gloucestershire's Key Settlements and District Populations
7. Outline of Employment Sectors

Table C – Summary SWOT Analysis