

GLOUCESTERSHIRE: THE SECURITY AND RESILIENCE HUB OF THE UK

A proposal to develop a narrative to unlock Gloucestershire's economic potential in the security and resilience sector



plexal

CONTENTS

This document presents an ask to the City Region Board to unlock funding (£315k) to develop a coherent narrative, action plan and governance structure to unlock the county's security and resilience cluster.

- 1 The case for change
- 2 Established strengths
- 3 Catalysts for growth
- 4 A county of innovation
- 5 Implementation plan
- 6 APPENDIX 1: points of differentiation:
Gloucestershire's unique offer



THE CASE FOR CHANGE

Now is an exciting time for Gloucestershire. At a national level, the new Government is 'mission-led' with key objectives including 'kickstarting economic growth', 'break down barriers to opportunity', 'make Britain a clean energy superpower', 'strong foundations', alongside an emerging industrial strategy where cyber, digital and defence are key pillars. Gloucestershire has a key role to play in this national picture, and a strategic opportunity to redefine and shape its narrative around a national security and resilience hub. Through local government reform, devolution and the development of Growth Plans, there is an opportunity to invest in high-growth sectors, strengthen regional narrative, create governance to enable high-performing clusters, and drive regional prosperity.

UNLOCKING GLOUCESTERSHIRE'S POTENTIAL AS THE UK'S HUB FOR NATIONAL SECURITY AND RESILIENCE

With Science and Technology Clusters becoming increasingly relevant to His Majesty's Government (HMG) and a national strategy emphasising growth in the digital, cyber, and defence sectors, Gloucestershire is well-positioned to lead in these domains, notably building on its presence as the 'front door' to the National Security ecosystem.

For nearly 70 years, the county has been home to GCHQ, a presence that has fostered the development of a significant security and resilience cluster, with the public unveiling of the 'Doughnut' in 2018. This sector has become ingrained in the identity of Gloucestershire, forming an essential part of the local economy and community. Whilst Cheltenham is the iconic 'home' of GCHQ, we know that the supply chain and its workforce come from all corners of the county and beyond, as does the pipeline of talent from schools – from Cinderford to Stroud.

While Gloucestershire has a strong foundation, other regions are gaining momentum. GCHQ's recent expansion and ongoing investment into Greater Manchester was influenced by the skilled workforce available there, and HMGCC's establishment of a 'co-creation' space in Milton Keynes further demonstrates a trend toward regional diversification. To maintain Gloucestershire's leadership position, we must proactively shape a clear and compelling narrative that reflects our strengths and ambitions. **Currently, Gloucestershire lacks a single, unified point of contact for stakeholders and investors, leading to inefficiencies in decision-making and collaboration.** As noted by a security community member working in both Manchester and Cheltenham:

In Manchester, you do feel the benefits of being able to talk to a single office (and sometimes person) in order to get an opinion or to get something done. In Gloucestershire, it sometimes feels like we need 4-5 people in order to represent everything the region has to offer.

There is a risk that without a shared and cohesive narrative, Gloucestershire will lose out on potential investment and growth within a UK or international context. To address this challenge, we must redefine a shared narrative that represents all of Gloucestershire and its neighbouring authorities. This will ensure we capitalise on existing assets and create an environment that attracts further investment and innovation in the security and resilience sector.

ESTABLISHED STRENGTHS

Gloucestershire has long been a leader in secure government operations, cyber security, and advanced technology. Anchored by GCHQ's presence, the county has developed into a national hub for cyber resilience, innovation, and collaboration. The cyber, national security and defence sectors in the county supports over **16,000** jobs with continued growth forecasted at 6% per annum.

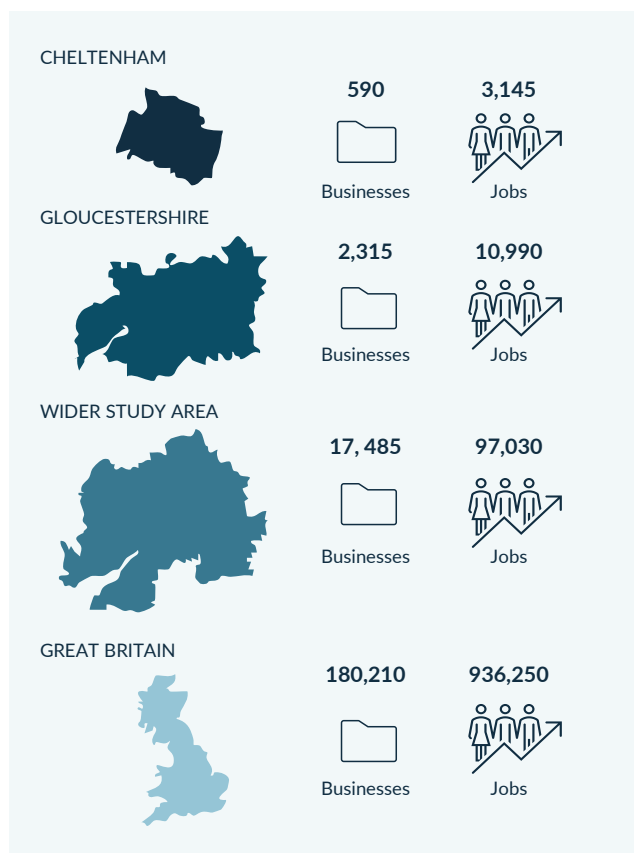
However, much of this sector's public focus and central government attention has remained centred in Cheltenham and now needs to be fully integrated across the wider region. We know that there are over 350 cyber-related firms operating across Gloucestershire, ranging from SMEs to large-scale enterprises. These businesses turnover an estimated **£1.6 billion annually**, with projections expecting this sector to grow significantly by 2030.

The county benefits from a strong ecosystem of assets, including academic institutions, defence contractors, and tech SMEs, which have flourished around its secure government presence. Research by the Western Gateway team highlights the geographical distribution of Gloucestershire's tech assets and expertise, with Cheltenham, Gloucester, and Tewkesbury serving as key centres of activity. The density of these assets and companies is 6 times more concentrated than the UK as a whole

Further strengthening our ecosystem is the presence of key institutions including the University of Gloucestershire and Hartpury University, which contribute to research, workforce development, and innovation. Alongside further education delivery partners, these institutions excel in the delivery of STEM and digital skills courses. In combination with private sector further training partners such as QA and others, this equates to 30% of the Gloucestershire workforce having advanced technical qualifications, which is expected to rise to 35% by 2034.

The South West's growing reputation for high-tech manufacturing and engineering also provides an opportunity to expand cyber integration into industrial applications, reinforcing Gloucestershire's role as a national leader in secure technology. With **33,000** people employed in the advanced manufacturing sector, accounting for 10% of Gloucestershire's workforce, it represents a huge growth sector, which, when linked with Golden Valley, could see over **£2.5 billion of GVA** added to Gloucestershire each year, which represents 15% of the total.

Similarly, the Agritech sector in the county is pioneering the use of AI and IoT in agriculture, for yield optimisation and resource efficiency. This sector employs over 5,000 people and contributes £300 million in GVA to the county, which expected growth of 6.1%. This sector has a great opportunity to partner more closely with the digital sector and its scale, accessed more easily and effectively through the Golden Valley Development.



The Scale of Gloucestershire's Digital Tech Sector compared to the UK. Source: ONS BRES, 2018; ONS UK Business Counts, 2019

CATALYSTS FOR GROWTH

Gloucestershire has long been recognised as a national leader in secure government operations, cyber security and advanced technology. With GCHQ at its core, the county supports over 16,000 jobs in the cyber, national security and defence sectors – a number projected to grow 6% each year. The sector is bolstered by more than 250 cyber-related firms generating £1.6 billion in annual turnover, with significant growth expected by 2030.

The Golden Valley Development (GVD) in Cheltenham is the next stage in Gloucestershire's evolution, designed to act as the catalyst for county-wide growth by connecting and amplifying existing strengths across sectors. As a nationally significant innovation district, GVD will:

- Deliver 3,500 new homes to support workforce growth and build a vibrant, sustainable garden community in West Cheltenham
- Create commercially collaborative spaces to foster partnerships between government, industry and academia
- Develop state-of-the-art transport and digital infrastructure to enhance connectivity across the county and attract national and international investment

WHY GOLDEN VALLEY MATTERS

The impact of GVD extends beyond Cheltenham, with the potential to unlock growth across Gloucestershire's key economic sectors:

- Cyber security and Digital Tech: 5-7% annual growth driven by the county's existing 250+ firms and Golden Valley's expanding ecosystem
- Agritech & Food Production: Projected to grow by 6.1% annually, supported by AI-driven precision farming innovations and the county's commitment to rural innovation
- Green Economy: A 6% annual growth rate underpinned by the Berkeley site's energy innovation hub and ongoing investments in renewable energy
- Financial Services: Expected to grow by 4.5% annually, building on Gloucestershire's strong base of financial and professional service providers

THE RISK OF FRAGMENTATION

While Gloucestershire's technology strengths are significant, they are also dispersed across the county. GVD presents a unique opportunity to unify this ecosystem and present a cohesive, compelling narrative to central government and international investors. Without this joined-up approach, Gloucestershire **risks losing government attention and investment** to competing UK regions. It **risks international firms opting for other global or UK national tech hubs** and that means it fails to capitalise on the existing momentum and strengths.

OUR CALL TO ACTION

Golden Valley must be positioned not just as a transformative project for Cheltenham, but as the **cornerstone of Gloucestershire's economic future**. By leveraging the county's deep-rooted expertise, **fostering inclusive growth** across all districts, and **clearly articulating its value to national policymakers**, Gloucestershire can strengthen its standing and define itself as the UK's Secure Tech and Resilience Hub. It can attract new investment into cyber, digital health, advanced manufacturing and agritech, and drive inclusive prosperity that benefits every community across the county.

A COUNTY OF INNOVATION

TO FULLY CAPITALISE ON GLOUCESTERSHIRE'S TECH STRENGTHS, THE GOLDEN VALLEY DEVELOPMENT MUST BE INTEGRATED WITHIN A BROADER INNOVATION ECOSYSTEM, LINKING KEY ASSETS ACROSS THE COUNTY.

It can act as a connective node for these diverse sectors and be a unifying enabler across energy, healthcare, manufacturing and agriculture. With significant investments across these industries, it is clear that the county is not only driving growth locally but also positioning itself as a national leader in secure technology and resilience.

The success of Golden Valley will depend on its ability to align with and amplify these efforts, creating a coherent narrative that demonstrates the county's contribution to the UK's wider security and digital transformation goals. This interconnected growth, with advanced manufacturing projects in Tewkesbury and Stroud and pioneering agritech inventions in the Cotswolds, underscores Gloucestershire's capacity to lead in fields where cyber security is not just a value-add but a critical foundation.

Communicating this to central government is crucial. Golden Valley is more than a regional initiative; it represents a strategically significant development that supports national objectives around energy security, healthcare innovation, resilient manufacturing and sustainable food production. The integration of these efforts, supported by the county's extensive investments and robust growth projects, should position Gloucestershire as the go-to location for secure technology and future-ready infrastructure. This collective approach will not only strengthen the case for continued support but also cement the county's status as a leader in the UK's secure tech landscape.



STRATEGIC OPPORTUNITIES FOR ALIGNMENT INCLUDE:

BERKELEY SITE
EXPANSION

Leveraging Berkeley's expertise in energy innovation, particularly nuclear and renewable technologies, as a complementary sector to cyber and digital technology. The site currently has a planned investment of £250 million over the next five years, resulting in an expected 1,500 jobs, with a focus on energy systems and associated cyber security. Cyber security applications for energy infrastructure could position Gloucestershire at the forefront of national energy resilience nationally, as well as contributing £180 million annually, with 4.5% growth projected in this sector over the next ten years.

THE COTSWOLDS AND
RURAL INNOVATION

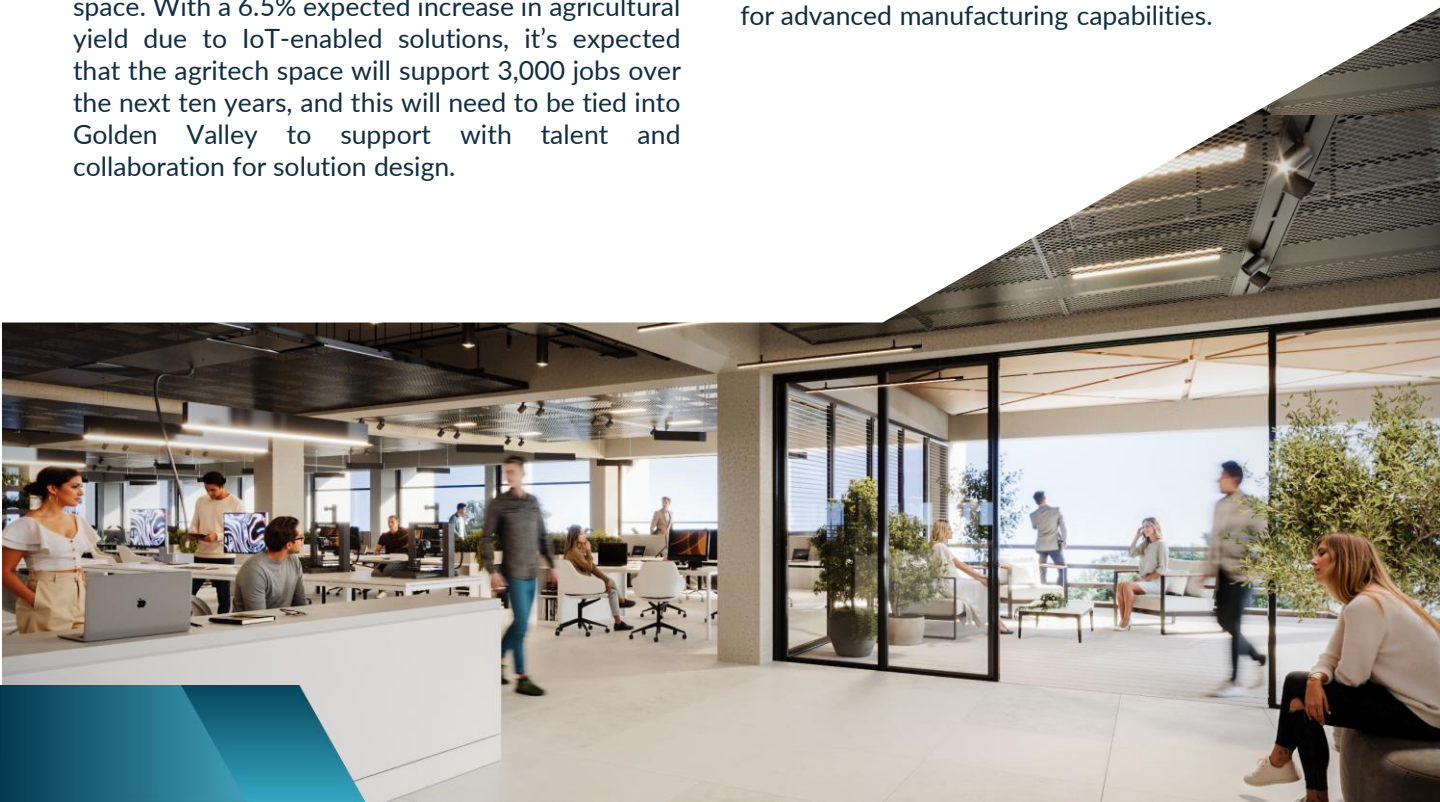
Exploring opportunities to integrate digital and cyber solutions into Gloucestershire's rural economy. With a strong focus on AI and IoT integration into agriculture, smart agriculture, digital connectivity, and sustainable tech solutions could enhance productivity in the region's farming and agritech industries. Currently, there is £120 million earmarked for innovation projects in this space. With a 6.5% expected increase in agricultural yield due to IoT-enabled solutions, it's expected that the agritech space will support 3,000 jobs over the next ten years, and this will need to be tied into Golden Valley to support with talent and collaboration for solution design.

GLOUCESTER'S
DIGITAL CAMPUS

Aligning with The Forum in Gloucester, which is growing as a hub for digital transformation and healthcare innovation. The Forum has seen £150 million invested into it to develop healthcare systems. Opportunities exist to integrate cyber security solutions into healthcare systems, ensuring secure patient data management and digital health advancements. This development should create 2,000 jobs in digital healthcare and telemedicine by 2028, and businesses in this development will contribute £500 million by 2030.

TEWKESBURY AND
STROUD

Supporting advanced manufacturing innovation by incorporating cyber-integrated capabilities. Tewkesbury's established aerospace and engineering sector could benefit from enhanced cyber security measures, making Gloucestershire a leader in secure manufacturing processes. There are multiple projects across these two locations which total c. £300 million of ongoing investment for advanced manufacturing capabilities.



IMPLEMENTATION PLAN

Delivering the vision



ENABLING THE PLAN

A VISION FOR GLOUCESTERSHIRE: SECURE TECHNOLOGY, INCLUSIVE GROWTH AND GLOBAL IMPACT

Gloucestershire stands at a pivotal moment. With a 70-year legacy of collaboration with the UK's intelligence and technology community, the county is uniquely positioned to become the UK's secure technology and resilience hub. Anchored by the presence of GCHQ in Cheltenham and the emerging Golden Valley Development (GVD), Gloucestershire's expertise in cyber security, national security, advanced manufacturing, agritech and digital healthcare spans the entire county.

However, this opportunity comes with a significant risk: without a clear, cohesive narrative and coordinated action plan, Gloucestershire risks being overlooked by central government (HMG), losing international investment, and falling behind other regions competing for the same strategic growth opportunities.

Over the next twelve months, a focused, high-energy effort will be launched to create and implement this narrative, ensuring Gloucestershire is recognised as the UK's home for secure technology and resilience.

STRATEGIC OBJECTIVES

1. Presenting Gloucestershire's Unique Cyber Advantage
 - Gloucestershire has an unmatched concentration of cyber, defence and technology expertise, supported by GCHQ and a well-established industry base.
 - The Golden Valley Development is Europe's most ambitious cyber campus, set to attract businesses in AI, cyber security and critical infrastructure protection.
2. Demonstrating County-Wide Impact
 - While Cheltenham is currently the focal point, the economic footprint of this sector reaches every corner of the county.
 - Ties need to be made into the aerospace and manufacturing clusters in Tewkesbury and Stroud, the healthcare cluster in Gloucester, the agritech hub in the Cotswolds and the energy and nuclear cluster in Berkeley.
3. Showcasing Inclusive Growth
 - The cyber security, defence and digital sectors already employ thousands of people from diverse communities across the county.
 - Schools, colleges and universities are all helping to feed the talent pipeline.
 - Growth in these sectors will deliver new opportunities, prosperity and skills to all communities, not just those near GCHQ. Golden Valley is a key enabler to unlock a lot of that potential and demand.
4. Highlighting the Risk of Inaction
 - The global competition for cyber and technology leadership is fierce.
 - If Gloucestershire does not present a clear, compelling case to government and investors, it risks losing out on investments at a UK and international level.
 - The UK's future in secure technology requires a recognisable national hub; Gloucestershire must make the case that it is that hub.

KEY ACTIONS FOR THE NEXT 12 MONTHS

1. **Defining a Shared Narrative** – Convening key stakeholders across local government, industry and education to create a unified vision. Focus on Gloucestershire's legacy, county-wide expertise and national relevance.
2. **Building Strategic Partnerships** – Deepen relationships with HMG, industry bodies and global partners. Position Gloucestershire as central to delivering the UK's National Cyber Strategy.
3. **Focused on Key Enablers** – Address critical infrastructure needs like housing, transport and skills development. Highlight the importance of the M5 Growth Corridor and investment in digital infrastructure.
4. **Delivering Tangible Outcomes** – Establish a county-wide leadership board to oversee delivery. Second in a member of local authority staff to act as a bridge between the public sector and commercial world. Develop clear metrics to measure investment, job creation and sectoral growth.

ENABLING THE PLAN

A VISION FOR GLOUCESTERSHIRE: SECURE TECHNOLOGY, INCLUSIVE GROWTH AND GLOBAL IMPACT

Gloucestershire stands at a pivotal moment. With a 70-year legacy of collaboration with the UK's intelligence and technology community, the county is uniquely positioned to become the UK's secure technology and resilience hub. Anchored by the presence of GCHQ in Cheltenham and the emerging Golden Valley Development (GVD), Gloucestershire's expertise in cyber security, national security, advanced manufacturing, agritech and digital healthcare spans the entire county.

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STRATEGIC OBJECTIVES

1 PRESENTING GLOUCESTERSHIRE'S UNIQUE CYBER ADVANTAGE

- Gloucestershire has an unmatched concentration of cyber, defence and technology expertise, supported by GCHQ and a well-established industry base.
- The Golden Valley Development is Europe's most ambitious cyber campus, set to attract businesses in AI, cyber security and critical infrastructure protection.

2 DEMONSTRATING COUNTY-WIDE IMPACT

- While Cheltenham is currently the focal point, the economic footprint of this sector reaches every corner of the county.
- Ties need to be made into the aerospace and manufacturing clusters in Tewkesbury and Stroud, the healthcare cluster in Gloucester, the agritech hub in the Cotswolds and the energy and nuclear cluster in Berkeley.

3 SHOWCASING INCLUSIVE GROWTH

- The cyber security, defence and digital sectors already employ thousands of people from diverse communities across the county.
- Schools, colleges and universities are all helping to feed the talent pipeline.
- Growth in these sectors will deliver new opportunities, prosperity and skills to all communities, not just those near GCHQ. Golden Valley is a key enabler to unlock a lot of that potential and demand.

4 HIGHLIGHTING THE RISK OF INACTION

1. The global competition for cyber and technology leadership is fierce.
2. If Gloucestershire does not present a clear, compelling case to government and investors, it risks losing out on investments at a UK and international level.
3. The UK's future in secure technology requires a recognisable national hub; Gloucestershire must make the case that it is that hub.

KEY ACTIONS FOR THE NEXT 12 MONTHS

1

DEFINING A SHARED NARRATIVE

Convening key stakeholders across local government, industry and education to create a unified vision. Focus on Gloucestershire's legacy, county-wide expertise and national relevance.

2

BUILDING STRATEGIC PARTNERSHIPS

Deepen relationships with HMG, industry bodies and global partners. Position Gloucestershire as central to delivering the UK's National Cyber Strategy.

3

FOCUSED ON KEY ENABLERS

Address critical infrastructure needs like housing, transport and skills development. Highlight the importance of the M5 Growth Corridor and investment in digital infrastructure.

4

DELIVERING TANGIBLE OUTCOMES

Establish a county-wide leadership board to oversee delivery. Second in a member of local authority staff to act as a bridge between the public sector and commercial world. Develop clear metrics to measure investment, job creation and sectoral growth.



IMPLEMENTATION PLAN

The implementation plan in this document presents a high-focussed effort of activity until the City Region Board in October 2025, where a detailed narrative and action plan will be proposed. This action plan will seek additional funding from the City Region Board and partners in order to fund delivery. The next six months will focus around three streams of activity:

WORK PACKAGE 1: NARRATIVE DEVELOPMENT

A consultant will be procured to shape a county-wide narrative for Gloucestershire's security and resilience hub. This narrative will be a key resource when engaging with partners at a UK and international level, and at key events such as UKREIIF. The narrative will be built through extensive research and stakeholder engagement, ensuring it reflects opportunities across the county and aligns to opportunities emerging from HMG.

WORK PACKAGE 2: ACTION PLAN

A 3-5 year action plan will be developed to compliment the development of the narrative. This will include clear projects, owners and partnerships that need to be delivered to enable the narrative to come to life, as well as clear KPIs.

WORK PACKAGE 3: GOVERNANCE AND SECONDMENT

We know that for a successful cluster to grow, it needs to be enabled by the right governance. A lead 'cluster manager' will be at the centre of this: designing the right partnerships and delivery methods to ensure success. A lead partner will need to be appointed to host the 'cluster manager', which could be a secondment opportunity.

OCTOBER 2025 ONWARDS:

The focus will turn to delivery of the action plan and governance processes.

	FY 25/26						
Activities	Apr	May	Jun	Jul	Aug	Sep	Oct
Work Package 1: Narrative Development							
Appoint consultant							
Research and content creation							
Outreach and advisory							
International positioning							
Brand creation and case studies							
Testing narrative with stakeholders							
Work Package 2: Action Plan Development							
Agree action plan parameters							
Map existing activity and governance							
Business engagement (including industry workshops)							
Skills pipeline - academic engagement							
Mapping of government policy / funding opportunities							
Development of action plan							
Verification of action plan							
Work Package 3: Governance and Secondment							
Job Description for head of cluster							
Agree host authority							
Hire head of cluster							
Establish ToR for cluster leadership board							
Review existing governance structures							
Develop proposals for new governance							
Alignment to action plan delivery proposals							
Overall							
City Region Board: paper to be developed							
Agree funding ask							
City Region Board Pitch							

NB: timescales are indicative and to be agreed with lead authorities

WORK PACKAGE 1: DEVELOPING THE NARRATIVE

ACTIVITY		OUTCOME
Research and Content Creation	Produce high-quality, audience-specific content for government stakeholders, investors and industry leaders. Content should highlight the region’s unique strengths, its ongoing investment in infrastructure and skills, and its potential to lead the secure technology sector	A fully developed, market-ready narrative, supported by tangible evidence of Gloucestershire’s strengths, and a targeted plan for dissemination and engagement with key stakeholders.
Outreach and Advocacy	Engage with senior stakeholder in central government, including the Cabinet Office, DSIT, MoD and the Home Office, to position Gloucestershire as an essential partner in delivering national security objectives.	
International Positioning	Work alongside current GCC Inward Investment functions to develop links with international partners in cyber and resilience sectors to position Gloucestershire as the UK’s international gateway for secure technology.	
Brand Creation and Case Studies	Develop a distinct, recognisable brand that presents Gloucestershire as the Secure Government and Resilience Hub of the UK. Develop case studies that showcase successful collaborations, innovation projects and secure tech development	
Approach	Procurement of consultancy to develop narrative and associated action plan through City Region Funding.	
Cost	£80,000	

WORK PACKAGE 2: DEVELOPING AN ACTION PLAN

ACTIVITY		OUTCOME
Business Engagement and Attraction	<ul style="list-style-type: none">Targeted business attraction campaign: Identifying companies aligned with the visionSoft Landing Programme support: Helping GCC's Inward Investment teamCluster Development events: Host industry-specific workshops, forums and networking events	A detailed 3-5 year action plan with defined workstreams, milestones, KPIs and assigned owners.
Talent Development and Skills Pipeline	<ul style="list-style-type: none">Expand partnerships with the universities in-county and beyond to align educational and research programmes with industry needsLaunch the Golden Valley Skills Hub in partnership with UoG, Gloucestershire College and AWS	
Infrastructure & Ecosystem Support	<ul style="list-style-type: none">Explore the possibility of creating a Gloucestershire Growth Zone for emerging technology and create the pitch to central government for the correct level of support	
Public Sector Collaboration	<ul style="list-style-type: none">Work with the Cabinet Office to support CBC's pitch for a Places for Growth civil service office in Golden ValleySupport CBC's bid for National Wealth Fund, and other possible bids for suitable infrastructureDevelop a Gloucestershire "Golden Edge" Tech fund with pension funds, venture capitalists and other investors	
Approach	Procurement of partner to develop narrative and associated action plan through City Region Funding.	
Cost	£80,000	

WORK PACKAGE 3: GOVERNANCE AND SECONDMENT

ACTIVITY		OUTCOME
Cross-County Collaboration	<ul style="list-style-type: none">Establish and develop a terms of reference for a county-wide Cyber & Digital Leadership Board, to align efforts across all districts	A robust governance model and a clear, compelling funding case that demonstrates how investment in Gloucestershire’s secure tech cluster will yield significant economic, social and strategic returns.
Governance	<ul style="list-style-type: none">Create working groups aligned with the key action areas of business engagement, talent, infrastructure and public sector collaborationCreate a framework for tracking progress, measuring impact and regularly report to the City Region Board	
Secondment	<ul style="list-style-type: none">Employ an individual through a voluntary lead authority from the districts to help coordinate efforts and to provide better links into each council.The seconded individual would be partnered with Golden Valley organisations (HBD or Plexal) to support this activity	
Approach	A cluster lead needs to be appointed. A lead authority will ‘host’ a cluster manager who will report progress into the City Region Board and established governance.	
Cost	£100,000 secondment, £55,000 governance enablement.	

APPENDIX 1

Points of differentiation:
Gloucestershire's unique offer

DIFFERENTIATORS: GREATER MANCHESTER

DRAFT

To differentiate itself from Manchester's approach, Gloucestershire can focus on its unique strengths while aligning with national cybersecurity goals.

SPECIALISATION IN NICHE CYBERSECURITY AREAS

While Manchester emphasises AI leadership and digital defence, Gloucestershire can position itself as a leader in secure government systems, defence intelligence, and cyber resilience for critical national infrastructure (CNI). With GCHQ based in Cheltenham, Gloucestershire can leverage its strong connections with government security agencies, defence contractors, and intelligence-led cyber innovation.

Building on the strength of GCHQ and the Golden Valley cyber hub

Rather than focusing on a general tech cluster like Manchester, Gloucestershire can anchor its cyber ecosystem around GCHQ and the upcoming Golden Valley development. It can develop high-security innovation zones, catering specifically to government, military, and policing needs, making it the go-to location for top-secret and classified cyber work. Gloucestershire can position itself as the "UK's National Cyber Intelligence and Resilience Hub", compared to Manchester's broader "home for UK digital security."

Security and Defence partnerships

While Manchester focuses on multi-sector partnerships, Gloucestershire can develop exclusive, high-security partnerships with defence agencies, NATO allies, and high-assurance cyber firms. Establishing joint training programmes with MOD, NSA, and other international intelligence bodies can create a global intelligence-driven cybersecurity network.

Focus on cyber talent with security clearance

Gloucestershire can differentiate itself by offering specialist cybersecurity training programmes tailored to intelligence and classified work, producing a workforce with high-level security clearance. Partnering with universities and government agencies can create exclusive fast-track pathways into classified cybersecurity roles.

Cyber resilience and national infrastructure protection

Unlike Manchester, which targets AI and general cyber growth, Gloucestershire can focus on cyber resilience and risk management for UK critical infrastructure, including:

- Financial institutions
- Energy and power grids
- Transport and defence systems
- Government networks

Sustainable and secure cyber development

Gloucestershire can be a cybersecurity innovation hub that prioritises sustainability, with environmentally friendly data centres and green cyber infrastructure. This can be complemented via the secure-by-design nature of Golden Valley as a tech park, offering cutting-edge cyber R&D in a controlled, intelligence-driven environment.

By emphasising national security, intelligence-led cyber innovation, and resilience for critical UK infrastructure, Gloucestershire will carve out a unique identity, distinct from Manchester's broader digital growth strategy.

DIFFERENTIATORS: MILTON KEYNES

DRAFT

Milton Keynes is an entrepreneurial tech hub focused on startups and smart city innovation. Gloucestershire must take a security-first approach, positioning itself as the UK's centre for intelligence-led cybersecurity, critical infrastructure protection, and national security innovation.

1. Prioritise national security over commercial technology

Milton Keynes markets itself as a testbed for startups. Gloucestershire must be the UK's nerve centre for classified cyber research and defence.

- Focusing on intelligence, defence, and secure government tech.
- Branding the UK's top cyber-intelligence hub.

2. Leverage GCHQ and the Golden Valley cyber hub

Milton Keynes has HMGCC, but Gloucestershire has GCHQ, a far greater strategic asset.

- Golden Valley must be a secure cyber innovation zone, not a generic tech cluster.
- High-security, vetted firms should be preferred within the ecosystem.

3. Exclusive high-assurance partnerships

Milton Keynes is building visibility in defence; Gloucestershire already leads.

- Strengthen direct pipelines to GCHQ, MOD, and global intelligence agencies.
- Develop exclusive partnerships with top security-cleared firms.

4. Train a security-cleared workforce

Milton Keynes has a young workforce, but Gloucestershire needs an elite, security-cleared talent pool.

- Create specialist cyber intelligence training with direct MOD and GCHQ recruitment pathways.
- Fast-track security clearance for top cyber professionals.

5. Lead in cyber resilience for national infrastructure

Milton Keynes focuses on smart city tech. Gloucestershire must lead in national cyber resilience, notably:

- Secure government, finance, energy, and transport systems.
- World-class defences against state-sponsored cyber threats.

DIFFERENTIATORS: PUNGGOL DIGITAL DISTRICT

DRAFT

Punggol Digital District (PDD) is Asia's leading smart city for tech innovation, blending sustainability, real-time data monitoring, and smart infrastructure.

In an international context, Gloucestershire can distinguish itself as the UK's high-security cyber intelligence hub, prioritising national security, classified cyber innovation, and critical infrastructure protection over smart city experimentation – focusing on:

Security & intelligence vs. open innovation

PDD is an open digital testbed for startups and academia. Gloucestershire must be a high-security, intelligence-led ecosystem, ensuring:

- Controlled access and secure innovation zones.
- Strict vetting of cyber firms collaborating with government and defence.

Cyber defence leadership vs. smart city development

PDD is focused on tech-driven urban living, while Gloucestershire must lead in cyber defence and intelligence innovation.

- Prioritising secure government, financial, and military infrastructure.
- Developing classified R&D for cyber warfare and national security threats.

GCHQ and Golden Valley vs. academic technology clusters

PDD integrates tech education with its Singapore Institute of Technology (SIT). Gloucestershire already has GCHQ, providing an unrivalled advantage:

- Creating a direct intelligence pipeline between GCHQ and cyber-focused universities.
- Training a security-cleared workforce for classified government roles.

National cyber resilience vs. commercial digital twins

PDD uses a digital twin for urban management; Gloucestershire must develop next generation cyber resilience for national infrastructure:

- Focusing on securing the UK's power grids, transport, and financial systems.
- Positioning itself as the UK's leader in cyber threat intelligence and countermeasures.

Intelligence-led public-private collaboration

PDD fosters public-private partnerships in tech startups. Gloucestershire must:

- Secure high-assurance partnerships with defence, intelligence, and cyber firms.
- Develop elite government-backed cyber research initiatives.

DIFFERENTIATORS: MARYLAND

DRAFT

Intelligence and national security vs. commercial cyber hub

- Maryland has a strong presence in both defence and commercial cybersecurity, attracting businesses and startups.
- Gloucestershire should highlight its role as a government-led, high-security ecosystem, prioritising classified innovation over commercial expansion.

GCHQ's specialist talent vs. Maryland's broad workforce

- Maryland benefits from a large cybersecurity workforce, encouraging business relocation.
- Gloucestershire has direct access to GCHQ's expertise, offering a highly specialised, security-cleared talent pool.

National infrastructure protection vs. global cyber exports

- Maryland focuses on international partnerships and talent attraction.
- Gloucestershire should position itself as the UK's leader in cyber resilience for essential infrastructure, protecting key sectors such as energy, transport, and finance.

Cyber defence innovation vs. quantum computing leadership

- Maryland is investing heavily in quantum technology to shape the future of cybersecurity.
- Gloucestershire should emphasise its role in cyber-defence innovation, ensuring the UK remains resilient against evolving cyber threats.