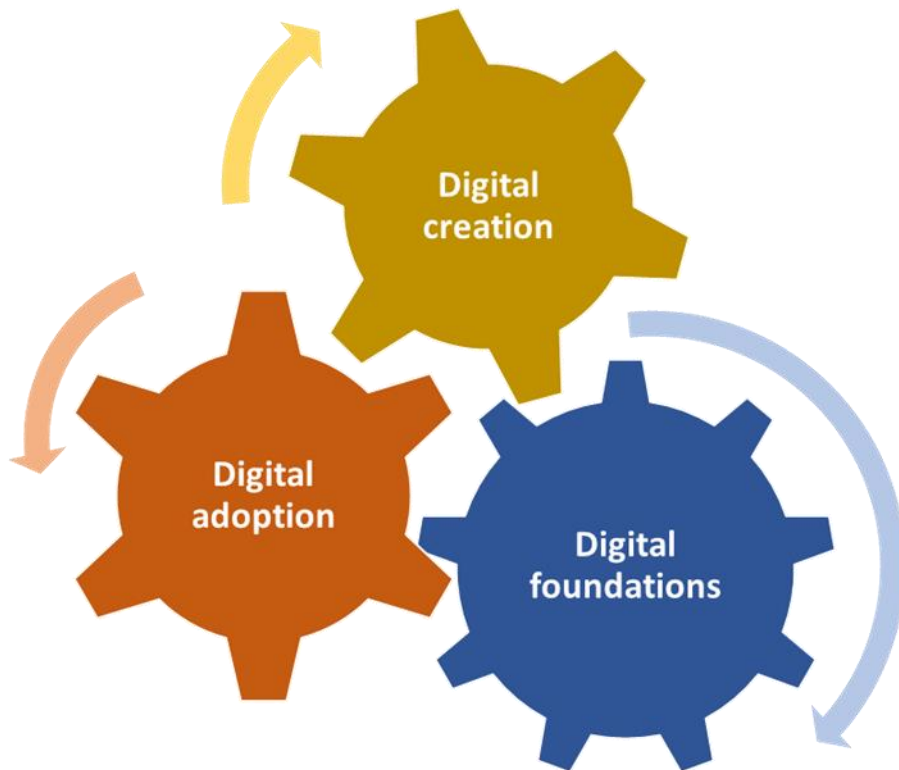


Connected and creative

Welcoming digital businesses in Swindon and Wiltshire

An ambitious strategy for a digital future

In Swindon and Wiltshire, we are committed to investing in a digital future...



... building on an outstanding assets, including:

- the UK's leading role as developing and commercialising digital technology
- our superb digital and physical connectivity
- creative and innovative businesses and entrepreneurs
- our talented workforce
- a positive environment for growth

... we will drive forward opportunities to **create** new products using digital technology, increase the **adoption** of digital technology across the economy and invest in our digital **foundations** of skills and infrastructure

This document explains our assets – and sets out Swindon and Wiltshire LEPs ambitious plans for growth, working together with our partners in business, education and the public sector

The UK: A world leader in digital technology

- In the five years to 2016, Britain's digital tech sector attracted **£28 billion** in venture capital and private equity investment – more than double the amount attracted to the sector in any other European country
- It is **driving exports**: 33% of London's digital customers are outside the UK
- It is **growing rapidly**: 50% growth in digital business stock, 2010-17
- Digital workers are **highly productive**: on average by £10,000 per worker...
- ... and they command higher salaries: average £43k salary for jobs requiring digital tech skills (compared with £32k for those which do not)
- London is a world-leading centre for digital technology. But the sector is **rapidly expanding** beyond the capital
 - *"In fact, there is a productivity power path from London to the mouth of the River Severn, travelling along the M4 corridor"*
- The UK **policy environment** is highly supportive – new sector deal for artificial intelligence and digital technology at the heart of industrial strategy

Looking to the future, five major trends will be important over the coming years:

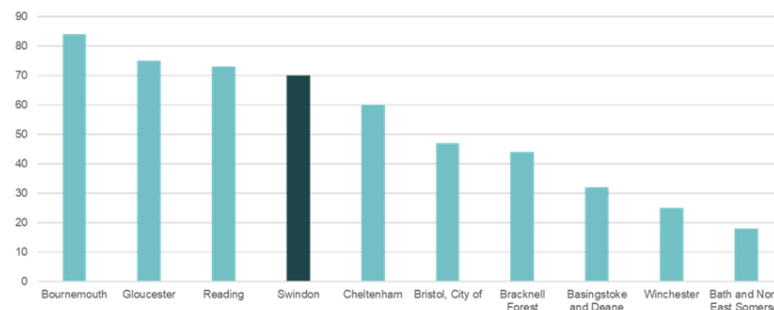
- **Expansion of artificial intelligence** and its impact on a wider and more sophisticated range of interactions
- **Continued development of digital platforms** to offer goods and services – with new types of rental and sharing models made more viable by new technology
- **Use of data to affect behaviour change**, better understanding how people use or respond to particular products and services
- **Changes in the nature of the workplace**, with greater use of freelance talent and new forms of online work management
- **New standards and business models**, with regulation 'catching up' – but then influencing innovation

These trends will influence economies everywhere. In Swindon and Wiltshire, we're growing our digital capabilities to drive them

Superb connectivity – digital and physical

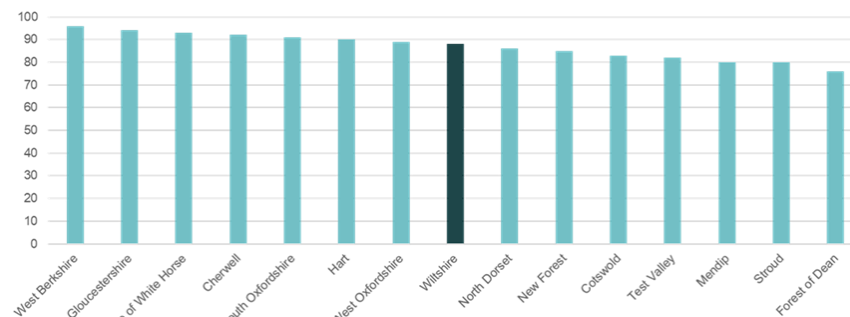
- Swindon and Wiltshire is **ideally located in central southern England**: where the M4 Corridor and the Oxford-Cambridge Corridor meet, in close proximity to the major tech hubs of Bristol, Bath, Reading and Oxford and a significant location for business in England
- Major road and rail links are excellent – and with **rail improvements coming soon**, the journey from Swindon to London will be reduced to 50 minutes by December 2018
- **Cost advantages** relative to neighbouring centres in Bristol/ Bath and Thames Valley
- Swindon and Wiltshire's **digital connectivity** is good. 70% of premises in Swindon now have access to ultrafast broadband (greater than 300 Mbps) and better than Bristol. Across Swindon and Wiltshire, almost 90% have access to superfast (greater than 30 Mbps): a good level of coverage in an a substantially rural area
- There is **strong commercial demand for increased bandwidth**: average data usage in Swindon is already high relative to comparator locations – helping to drive demand for further investment
- **Mobile coverage is good and getting better**. Everywhere in Swindon and Wiltshire is covered by at least one operator. 90% of Swindon's land area and 67% of Wiltshire's is covered by all four mobile operators

70% ultrafast in Swindon: % of premises with access to ultrafast (over 300 Mbps: Swindon and comparators)



Source: Ofcom (2017)

90% superfast in Wiltshire: % of premises with access to superfast (over 30 Mbps: Wiltshire and comparators)



Source: Ofcom (2017)

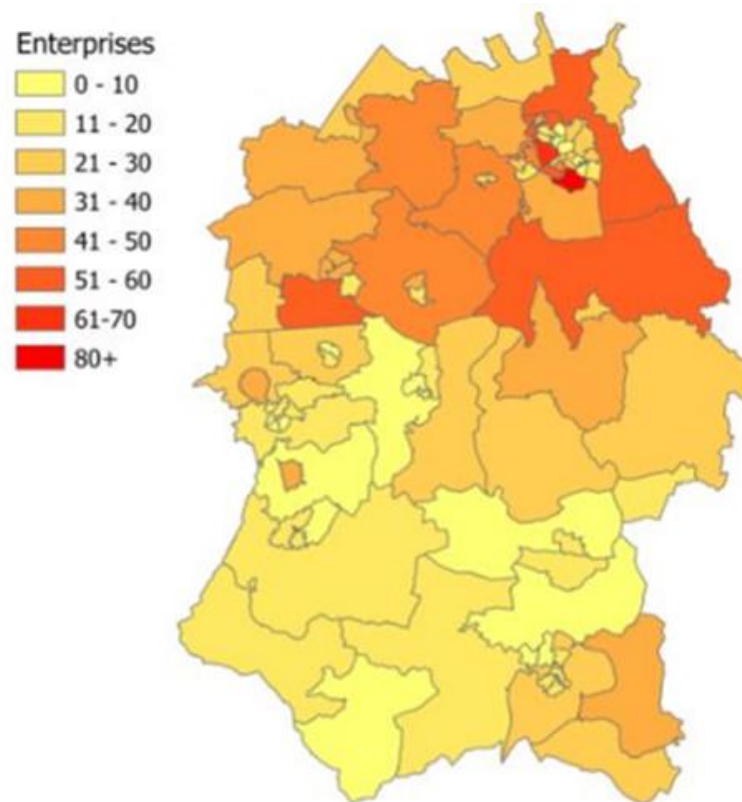
Creative and innovative businesses

- **2,500 digital businesses** call **Swindon and Wiltshire home**, employing over 12,000 people
- The digital sector is growing rapidly – **35% growth in Swindon and Wiltshire's digital business stock** between 2010 and 2017
- Overwhelmingly, the sector is made up of micro businesses – but increasingly, digital businesses are scaling up...
- ... and Swindon and Wiltshire has several **world-famous names** – including Intel in Swindon and Dyson in Malmesbury
- Digital businesses are located **throughout Swindon and Wiltshire**, with concentrations around Swindon and Corsham

Business views: Why we are located in Swindon and Wiltshire

"Convenient, central and accessible location"
"Strategically placed at the centre of the South"
"Critical mass" – lots of businesses and talent and easy to recruit
"Good talent retention"
"Access to universities along the M4"
"Great quality of life"
"Competitive costs compared with Bristol and London"
"A growing informal cluster of businesses"

Digital enterprises across Swindon and Wiltshire



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Creative and innovative businesses: Key sectors

Sector	Opportunities and assets	Key businesses include
Fintech	Major area of UK advantage Close to major industry centres in London and Bristol	Nationwide (Swindon), Appsbroker (Swindon), Foregenix (Marlborough)
Telecoms and digital infrastructure	Expansion of connected devices Integration between telecoms providers and content providers Major data centre provision at Corsham	Excalibur (Swindon), Horizon Telecom (Swindon), Berry Telecom (Salisbury), Vysiion (Chippenham), ARK (Corsham)
Digital marketing and e-commerce	Increasing sophistication as AR and social media integrated and personalisation increases Increasing sector diversity	Corvita Digital (Chippenham), Infinity Nation (Royal Wootton Bassett), Dentons Digital (Westbury), Render Media (Swindon), Create Studios CIC (Swindon)
Cybersecurity	Key military capabilities at MoD Corsham, Porton Down and the UK Defence Academy at Shrivenham	Ploughshare Innovations (Salisbury), Torchlight (Swindon), Networkology (Corsham)
Digital health	Rising demand in the light of ageing population and potential for technology to drive down costs Swindon & Wiltshire Health and Life Sciences Innovation Hub	UK Cloud Ltd (Corsham), Quicksilver (Chippenham), Silicon Practice (Swindon)
Digital entertainment	UK the world's fifth largest games market Proximity to clusters of games companies in neighbouring areas	Glowing Eye Games (Chippenham), GeekBeach (Swindon)
Manufacturing and Industry 4.0	Rising importance of industrial digital technologies (IDTs) Long established engineering sector	Dyson (Malmesbury), BMW (Swindon), Honda (Swindon), Intel (Swindon) Zircon (Trowbridge)

Key sectoral opportunities for inward investment

Particular sub-sectoral inward investment opportunities include:

- **Defence-related and cybersecurity** – linked with the concentration of defence-related activity at Corsham and Porton Down (including recent major announcements of investment in new digital capabilities). Swindon and Wiltshire – together with Gloucestershire, Worcestershire and The Marches forms the second largest concentration of cybersecurity activity outside London
- Opportunities should exist to build on the infrastructure currently in place (for example through Ploughshare Innovations) to support the commercialisation of defence-related technologies; and to promote Swindon and Wiltshire as a location for international defence-related businesses, building on the local talent pool
- **Industry 4.0** – an area in which Swindon and Wiltshire has established advantages, and a number of international businesses.
- Opportunities should exist to build on recent investment (for example by Dyson at Malmesbury) to expand existing businesses and attract new investment in the supply chain
- **The wider service sector**, particularly in telecoms and financial services, in which Swindon and Wiltshire has existing strengths and offers cost advantages over neighbouring locations.
- **Attracting start-ups and smaller-scale business expansions**, driven by proximity to markets, improved connectivity (physical and digital) and Swindon and Wiltshire's quality of life offer. Ensuring a suitable supply of business space – and staying ahead of demand for improved digital connectivity – will be crucial

However, this should be seen in the context of increased demand for advanced digital skills and infrastructure from all potential investors – reinforcing the importance of the 'digital foundations' focus within the Strategy.

An environment for growth

- Increased access to **digital business space**: development of specialist facilities aimed at the digital sector underway at Corsham Mansion House and enterprise centres and support available through the TEN network
- Major opportunity to develop a new town centre digital offer at **The Carriage Works** in Swindon
- Welcoming and inclusive digital business community that is becoming increasingly well networked
- Supportive **public sector**, committed to growing Swindon and Wiltshire's digital economy and investing in infrastructure
- Dynamic and diverse **cluster of digital businesses**, increasingly working together in a supportive and welcoming network
- Rural **quality of life** with the advantages of a superb natural environment alongside connectivity to urban scale and networks

The Carriage Works: A new centre for digital business activity

- Owned by Swindon Borough Council, The Carriage Works, west of Swindon railway station, will provide a major mixed-use development linked with Brunel's historic Railway Village.
- Phase 1 of the development will provide an incubation centre, opening in 2018, with further phases offering (in total) 118,500 sq ft of flexible workspace.
- Whilst the commercial strategy for The Carriage Works is to be finalised, the innovative use of digital technology is likely to be central to many of the firms that will be attracted to the Carriage Works, and the development has the potential to provide a new focus for digital businesses at the heart of Swindon.

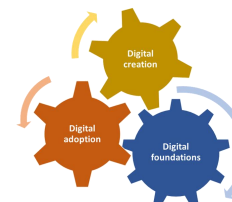
A talented workforce

- Swindon and Wiltshire enjoys **excellent access to talented people**. It is located in close proximity to universities in Oxford, Gloucestershire, the Thames Valley, West of England and the South Coast and draws on talent from across a wide hinterland, including the M4 Corridor
- New investment in innovative forms of higher education provision is coming forward – for example the new **Dyson Institute of Engineering Technology**, offering degrees specifically geared to business demand
- Businesses report success in attracting **committed and loyal staff** – with significant cost advantages over neighbouring locations
- Three **further education** colleges have a computing and digital technology offer, which is increasingly embedded across the curriculum
- There are **strong links** between employers and the skills system – including through Swindon and Wiltshire's innovative **Higher Futures** service, which links businesses with providers to help them access the workforce they need

The Swindon Institute of Technology: A new opportunity for advanced technical education

- Institutes of Technology are a Government initiative to increase the supply of people with advanced technical skills, linked with business demand
- Swindon College, with New College Swindon, , University of Gloucestershire, Oxford Brookes University, key business partners, Swindon and Wiltshire LEP and GFirst LEP, is developing a proposed Institute of Technology to offer new higher and technical education in STEM skills including expansion of higher and degree apprenticeships.
- The Swindon proposal is now one of only 16 in England to be progressed to the next stage of consideration – with further announcements later this year

Ambitious plans for the future



Looking to the future, we will build on our strengths and grow our digital capabilities, focused on...

<p>Supporting digital creation, creating a dynamic ecosystem in which businesses at the forefront of digital innovation can grow and flourish</p>	<p>We will:</p> <ul style="list-style-type: none"> • develop a strengthened, private-sector led support model, geared to the growth of the digital sector • develop a 'networked hub' for digital businesses, with links across Swindon and Wiltshire • ensure that effective physical provision is made for small and growing digital businesses • drive demand for innovation through public sector transformation
<p>Driving digital adoption across the economy, ensuring that all businesses in Swindon & Wiltshire derive competitive advantage from digital technology</p>	<p>We will:</p> <ul style="list-style-type: none"> • encourage all employers to invest in the digital skills of their existing workforce • promote engagement by businesses in Swindon and Wiltshire in programmes to test and roll out new technology • encourage collaboration between our innovative digital businesses and the wider business community • drive demand for digital solutions through public procurement
<p>Reinforcing our digital foundations, creating a workforce with the skills to create, embrace and secure value from digital technology and ensure that our infrastructure keeps pace with ever changing demand</p>	<p>We will:</p> <ul style="list-style-type: none"> • build the capacity of education providers to harness digital technologies • encourage children and young people to aspire to build strong technical skills • ensure digital skills are accessible to everyone • Continue the rollout of superfast broadband and focus efforts on locations with poor broadband provision and mobile coverage • engage with the 5G test bed programme - core to the UK and local economy

Get involved

To find out more about our ambitious plans for Swindon and Wiltshire's digital future, contact us....