



**DRAFT LOCAL ECONOMIC  
STRATEGY REVIEW  
2013/2014**

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# FOREWORD



It is now over seven years since Plymouth published its first local economic strategy.

The strategy, a key milestone in our economic history, sought to deliver a step-change in performance, establishing the city as competitive, diversified, balanced, and well-connected. It remains a solid basis for economic development in Plymouth in terms of its overall vision, long-term economic drivers and strategic priorities.

Since 2006, however, there have been significant changes which have prompted the need for a review of these priorities. While we have seen tangible improvements across some of the strategy's critical success factors, a number of long-term structural challenges remain. We must continue to focus on these if we are to fully realise our potential as the urban driver of the wider sub-regional economy. The Great Recession of 2008/9 and its 'long tail' exacerbated these issues and, like all economies, pushed us off course. Furthermore, changes in the economic development delivery landscape, including the emergence of Local Enterprise Partnerships, have brought fresh challenges and opportunities.

Locally, this review will form a key building block in the emerging Plymouth Plan – the overarching framework for growth and development in the city. Having a set of clear, refreshed economic goals will be crucial to the success of this ambitious project.

We need to build upon progress set in train by our 2006 strategy and refocus our efforts on the things that will generate the greatest returns to our economy. Importantly, we need to play to our strengths. The Plymouth and Peninsula City Deal, represents a transformational opportunity to address long-standing issues of low productivity, building on our competitive advantages in marine and related manufacturing. It will also help harness the potential of our young people by providing routes into more sustainable and better paid employment.

But there are many more opportunities and our review has drawn these together into a series of flagship areas. By the time of Mayflower 2020, we will have delivered on a whole package of projects designed to take the city's economy to a new level of focus and ambition.

Our approach to this review has been one of co-design, working through the Plymouth Growth Board to engage a range of stakeholders across the city and beyond. The positive energy and momentum generated needs to continue. Increasingly, we will need to work with partners across the peninsula – it is only with their support that we can truly achieve our goals. This is very much about Plymouth leading growth beyond its administrative boundaries and playing a greater role on the global economic stage.

We invite you to read our local economic strategy and, more importantly, to continue to play your part in delivering on its ambitions to create a more prosperous future for the city of Plymouth.

Cllr. Tudor Evans  
Leader of Plymouth City Council

Paul Woods  
Chair of Plymouth Growth Board

# EXECUTIVE SUMMARY

Plymouth is one of the UK's key cities and the most significant urban area of the far south west. As Britain's Ocean City, few places can rival its rich cultural, natural and built assets.

As a centre of excellence for marine science and manufacturing, the city has a unique set of competitive advantages on which to build upon in its transition to a more competitive and thriving knowledge-based economy. Its high quality educational infrastructure, including two universities and a substantial pool of young talent, continues to grow, playing an ever increasing role in supporting economic growth agendas.

The city has seen many exciting changes over the last few years – the redevelopment of sites such as the Royal William Yard, significant capital investments including Plymouth Life Centre, the growing role of Derriford as a hub for high-value business growth, and transformational regeneration projects in Devonport and North Prospect.

The latent potential of our people and assets is vast and presents businesses with a wealth of opportunities.

## **Review – refocus – reenergise**

Our review considers that, broadly, the city's Local Economic Strategy (LES) remains a strong basis for economic development in Plymouth in terms of its overall vision, long-term economic drivers and strategic priorities. It does, however, recognise that to have the greatest economic impact, it needs to refocus the delivery-end of the strategy on a smaller number of transformational interventions.

It details both challenges and opportunities for the city's economy. While much progress has been made, Plymouth continues to experience a 'productivity gap' with other stronger performing city economies, and is therefore yet to fully realise its potential as the urban driver of the wider south west peninsula. Allied to this, an overdependence on the public sector in output and employment terms has created an economic vulnerability more akin to areas of northern England, rather than the relatively more prosperous south. Therefore, at the heart of this review are the overarching objectives of raising average productivity across the city's industry sectors, and rebalancing economic activity in favour of business investment and exports.

The review acknowledges significant areas of opportunity to overcome these. Mayflower 2020 could be a pivotal moment for the city's economy and if designed and delivered to be a dynamic and innovative event, has the potential to drive forward many aspects of the city's economy – business growth in marine and related industries; the visitor economy; the culture of the city in its broadest sense; and raising the Ocean City0 profile and reputation in global markets. These will be supported by the Plymouth and Peninsula City Deal which places the city at the centre of wider sub-regional growth, recognising its ability to deliver significant productivity and employment growth beyond its administrative boundaries.

## New approach

In creating a more thriving economy, Plymouth needs to continue to play to its strengths. It needs to take account of what makes the city 'stand out' in an increasingly crowded global marketplace to foster and attract enterprise and investment. Our vision remains the same.

The review recommends, however, that this vision is supplemented by a focus on the opportunity presented by Mayflower 2020 as a major milestone in the reinvention of Plymouth as Britain's Ocean City.

### OUR VISION

Britain's Ocean City: One of Europe's most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone

### OUR FOCUS

Mayflower 2020 – a premier UK event – presenting Britain's Ocean City to the world

The LES review sets out a series of flagships, designed to build on progress set in train by LES 2006 and to take the city's economy to a new level of focus and ambition. Supporting each of these flagships, are a set of strategic objectives, to guide our interventions, and a set of actions which will be subject to regular review to ensure the delivery-end of our ambitions remains flexible and responsive to both opportunity and need.



By the time of Mayflower 2020, we will have delivered on an exciting package of flagship interventions to help raise our competitive position:

## Our six flagships

Ocean City Infrastructure	Accelerating infrastructure delivery, creating the right environment for growth and investment
Digital Economy	Delivering the demand stimulation and business opportunities to make the most of the city's strong digital connectivity
Business Growth and Investment	Developing a coherent support offer to enable our businesses to become more enterprising, innovative and productive, excelling in global markets
Learning and Talent Development	A major civic approach to learning and skills development – driven by individuals, businesses and institutions, and supported by providers and civic society
People, Communities and Institutions	Harnessing the economic potential of the city's people and communities – connecting them to local assets, resources and support to create employment opportunities
Visitor Economy and Culture	Building on the Mayflower 2020 opportunity and the city's cultural and visitor offer to raise its profile and reputation in global markets

Underpinning our flagships will be a commitment to **sustainable development**. Cities that proactively respond to the business challenges and opportunities presented by the shift to a low carbon economy will be more competitive and resilient in the long term. We also recognise the importance of making sure the opportunities created by economic growth and development are shared fairly among the city's resident population.

## Priority interventions

Within the flagships, our review has identified a number of transformational opportunities which should be given the highest priority for delivery.

These are:

**Strategic Infrastructure** - Recognising the crucial role that large scale capital investment and infrastructure delivery play in creating the conditions for economic growth, we will prioritise a number of 'big ticket' interventions: A Marine Industries Production Campus (MIPC) at South Yard to support marine and advanced manufacturing growth; a City Centre Diversification Programme to create a modern fit-for-purpose city centre; and through Plymouth Science Park Phase five and a new City Centre Innovation Centre, investment to support high-value, knowledge-based growth.

**GAIN Growth Hub** - The Growth Acceleration and Investment Network (GAIN), founded by Plymouth University, with Plymouth City Council and Plymouth Science Park, is a Growth Hub bringing together business infrastructure, world class research facilities and expertise. Building on GAIN, we will draw together resources from across the city to provide a clear and accessible offer for all businesses looking for start-up support, advice, guidance and signposting.

**Deal for Young People** - To ensure our residents are productively employed and the needs of the local economy met, we need to create an 'employer-led' skills system which is both flexible and responsive. We will build on the momentum generated by the Plymouth and Peninsula City Deal, to develop a skills matching service with an associated physical 'hub' in the city and web portal. This will integrate and simplify all existing support and use local labour market intelligence to better understand the nature of future employment and skills demand.

**Mayflower 2020** - Mayflower 2020 provides a unique, once in a lifetime opportunity to present Britain's Ocean City to the world and maximise the impact of our assets. We will establish a joint level of ambition with the US and a Mayflower executive function to take our plans forward, and through capital investment aimed at boosting our visitor and cultural 'offer', the development of new trade links, and a major events programme, we will ensure the huge economic benefits on offer are fully captured.

**Social Enterprise City** - Building on our unique strengths and assets is at the heart of our approach. Capitalising on our new status as one of the UK's first Social Enterprise cities, we will work with residents, communities and institutions across the city to drive economic growth and community regeneration through new social enterprise.

# STRATEGIC OVERVIEW

## Flagships, objectives and actions

### OCEAN CITY INFRASTRUCTURE

Accelerating infrastructure delivery, creating the right environment for growth and investment

- **Unlock** critical infrastructure for marine sector growth and Mayflower 2020
- **Optimise** the economic potential of the city centre and waterfront
- **Create** the conditions for knowledge-based business growth
- **Enhance** the city's commercial and residential property offer
- **Ensure** Plymouth is 'well connected'

#### Proposed actions

- Marine Industries Production Campus
- City Centre Diversification Programme
- Plymouth Science Park Phase Five
- Visitor Economy Capital Plan



### DIGITAL ECONOMY

Delivering the demand stimulation and business opportunities to make the most of the city's strong digital connectivity

- **Unlock** barriers to digital connectivity among businesses and residents
- **Support** development and retention of digital skills and entrepreneurs
- **Exploit** new digital technologies and innovations

#### Proposed actions

- Digital Skills Academy
- Advanced connectivity – public Wi-Fi and business parks
- Web-fuelled business exports
- Digital/creative business start-ups



### BUSINESS GROWTH AND INVESTMENT

Developing a coherent support offer to enable our businesses to become more enterprising, innovative and productive, excelling in global markets

- **Create** an integrated and accessible business support offer
- **Increase** the number of business start-ups
- **Support** innovation and knowledge-based growth
- **Raise** the proportion of city businesses exporting
- **Attract** and support new business investment

#### Proposed actions

- GAIN Growth Hub
- City Centre Innovation Centre
- First stage exporting/ Mayflower 2020 expo
- Investor readiness





## LEARNING AND TALENT DEVELOPMENT

A major civic approach to learning and skills development – driven by individuals, businesses and institutions, and supported by providers and civic society

- **Match** skills with demand
- **Drive** entrepreneurship and innovation
- **Improve** core skills
- **Prepare** for work and address worklessness

### Proposed actions

- Deal for Young People
- Graduate retention programmes
- Apprenticeship Academy
- STEM/Green skills



## PEOPLE, COMMUNITIES AND INSTITUTIONS

Harnessing the economic potential of the city's people and communities – connecting them to local assets, resources and support to create employment opportunities

- **Deliver** effective community enterprise and employment support
- **Support** the growth of social enterprises
- **Increase** local procurement and improve access to services

### Proposed actions

- Community Economic Development Trust
- Plymouth Your Space
- Social Enterprise City
- Local procurement for SMEs



## VISITOR ECONOMY AND CULTURE

Building on the Mayflower 2020 opportunity and the city's cultural and visitor offer to raise its profile and reputation in global markets

- **Raise** the profile of Britain's Ocean City in global markets
- **Grow** the city's visitor economy
- **Unlock** the potential of the city's creative sector and cultural heritage

### Proposed actions

- Mayflower 2020 Major Events
- Visitor Plan
- The Vital Spark
- History Centre



## The purpose of the LES

The LES, first published in 2006, provided a single shared vision for the development of the city's economy into one that was more competitive, diversified, balanced, and well-connected. It serves as a key document for all those involved in economic development, regeneration and promoting enterprise across the city and beyond. For the public sector, it describes how, by overcoming market failures, it can create the right conditions for sustainable growth and development. For the private sector, it provides clarity about local priorities and the economic challenges and opportunities that exist.

In short, the LES sets out Plymouth's shared economic priorities, providing a clear framework to guide and influence activity, resources and investment.

## Why it has been reviewed

The LES review, led by the Plymouth Growth Board (PGB) and project managed by its Economic Intelligence Sub-group/Third Life Economics, was prompted by three key drivers:

- The profound changes in the economic development landscape since 2006;
- To feed into the development of the wider Plymouth Plan;
- To serve as our contribution to the Heart of the South West (HotSW) LEP strategy developments.

## How we did it

Our approach was split into three distinct phases:

- A review of the evidence base including assessment of performance against the Critical Success Factors set out in LES 2006. Where there were evidence gaps, research was commissioned to build our understanding of the local economy. All findings will be summarised in a supporting evidence base document;
- A series of stakeholder workshops which, reflecting on an updated evidence base, considered the overarching priorities and themes for The LES and lessons learned since 2006. Stakeholders also considered the 'big ticket' interventions that could deliver on these;
- Development of drafting teams to 'action plan' a number of flagship project areas.

## How we will judge success

Our review will be accompanied by a detailed Implementation Plan which will be used to monitor the LES. This will set out, in detail, the strategic leads, project teams and detailed actions for performance managing our six flagships.

In addition, through a new Plymouth Growth Dashboard we will adopt a more granular approach to monitoring progress, going beyond a focus on simple national benchmarks to garner a richer understanding of our comparative economic performance. Against the 22 'Key Cities' we will seek to raise our relative standing on a basket of indicators.



# PLYMOUTH'S ECONOMY

With a population of 258,000, economic output of £4.5 billion and 105,000 jobs, Plymouth is the most significant urban area on the south west peninsula.

The overarching aim of LES 2006 was to achieve an improved competitive position for the city by raising rates of productivity (economic output per capita); a series of success factors and actions were geared towards this objective<sup>1</sup>. The city's economic performance up to the onset of the global financial crisis and subsequent recession of 2008/9, showed some signs of improvement particularly in terms of nominal Gross Value Added (GVA), relative GVA per job/hour, and employment growth. However, even pre-recession there were concerns about the sustainability of that growth given its reliance on public sector jobs, a construction-led housing boom, and the relative weakness in higher value financial, professional and business services. The recession was deeper and more enduring in Plymouth than elsewhere and overall GVA growth over the decade to 2012 was lower than national and regional (SW) averages.

Policy neutral forecasts suggest long-run employment and GVA growth rates below the national average to 2031. In other words, in the absence of new interventions, the 'productivity gap' is likely to widen given relatively weak performance across the majority of our industries.

**Table 1: Plymouth's key economic indicators**

		<b>Plymouth</b>	<b>UK/GB</b>	<b>Key Cities</b>
<b>Output</b>	GVA per head (UK=100)	82.5	100	15/19*
	Percentage growth (2002-12)	3.6	3.7	9/19*
<b>Income</b>	Household income per head (UK=100)	85.3	100	9/19*
<b>Economic activity</b>	Percentage working age population	74.6	77.2	4/22
<b>Claimant rate</b>	Percentage working age population	2.7	3.0	7/22
<b>Enterprise</b>	start-ups per 10,000 working age population	42	66	19/22
	stock per 10,000 working age population	351	580	21/22
<b>Skills</b>	Percentage NVQ4+	19.3	27.3	15/22
	Percentage no qualifications	6.2	9.9	3/22
<b>Innovation</b>	Percentage knowledge based jobs	13.3	18.9	16/22
<b>Index multiple deprivation</b>	Rank out of 326 local authorities	72		13/22

\* Data not available for all 22 key cities

<sup>1</sup> A detailed analysis of economic performance can be found in Plymouth's Economic Review series. Issue 4 – LES review special - will be published alongside this review

Against other cities, Plymouth has tended to perform better on headline labour market indicators such as unemployment and skills attainment. There remain, however, long term issues of youth unemployment and underemployment. The city saw tangible progress at both ends of the 'skills spectrum' between 2006 and 2012 – convergence with the national average on proportion of workforce with degree level qualifications (Level 4 and above) and continued reductions in individuals with no qualifications. The city's performance on no qualifications, however, remains stronger than for higher-level qualifications.

It is on productivity and its drivers (particularly business start-ups, density and knowledge based employment) where the city continues to lag and needs to raise its relative standing.

Permanent increases in productivity underpin sustainable economic growth in the long term. Given that our underperformance has tended to be 'sector blind', the focus of our interventions should be on addressing the fundamental drivers of productivity. Indeed, these drivers shaped much of LES 2006 and should therefore remain broadly the same (albeit with some degree of refocusing):

## Enterprise and entrepreneurship

Enterprise is a key driver of productivity – in the form of new entrants to the marketplace it increases competitive pressures necessary for business churn and growth. Currently, the city underperforms on this measure, recording comparatively low business birth and death rates.

The LES should consider what measures it can take to assist businesses of all shapes and sizes to access the finance and support required to start-up, innovate and expand

## Indigenous and inward investment

Physical investment in capital is an essential ingredient in helping businesses produce more and higher quality output. Equally, inward investment – in the shape of new businesses locating in the city – supports growth by bringing in new jobs, skills and ideas.

The LES should seek to explore how the city can foster investment and employment growth among its indigenous businesses while, at the same time, positioning itself to attract investment from further afield

## Innovation and the knowledge economy

Innovation relates to the successful exploitation of ideas and the introduction of new products and processes. Innovative firms grow twice as fast in terms of employment and turnover. Our aspirations for a balanced, diversified and knowledge intensive business base remain.

The LES should explore how the city can continue to build its innovative capacity, drawing on the significant intellectual capital of its Higher Education Institutions (HEIs)

## Employment and skills

Despite its broadly positive ranking on labour market indicators, the recession had a damaging impact on the city's labour market, exacerbating long-standing issues of youth and long-term unemployment. Full-time opportunities remain scarce with many individuals underemployed or locked out of the jobs market altogether.

The LES should consider how to support people back into work, including those furthest from the labour market and living in the city's most deprived communities

Skills are important drivers of productivity, both directly in terms of improving individual performance and, indirectly, by providing the tools to generate new ideas and practices. Despite improvements, Plymouth remains behind its competitors in terms of the proportion of its workforce with higher-level qualifications.

The LES should consider how it can nurture, attract and retain talent locally

## Economic rebalancing

Rebalancing implies a shift in economic activity from domestic consumption to business investment and exports, and from the public to private sector; with an increased focus on manufacturing. City businesses are on average comparatively insular with a low propensity to export<sup>2</sup>. We do, however, have considerable marine and advanced manufacturing strengths, with a number of internationally facing businesses.

The LES should consider how the city can mitigate the risks and capture the benefits presented by economic rebalancing

## Connectivity

High density and productive linkages between businesses, individuals and institutions in urban areas bring distinct advantages for economic development. Productivity is positively affected by proximity to urban 'mass'. The city's physical peripherality means businesses tend to be sheltered from the competitive forces that drive innovation and growth.

The LES should seek to maximise Plymouth's role as the economic driver of growth and development across the south west peninsula, building its effective density and links to other areas



<sup>2</sup> See Plymouth's Economic Review Issue 2 (2012) Plymouth Growth Board

# 2006-13: PROGRESS, CHALLENGES AND NEW OPPORTUNITIES

LES 2006 set out a comprehensive, evidence-based approach to growth and development in the city. A review of each of the five themes – ‘Business’, ‘Skills’, ‘Centres’, ‘Economic Inclusion’ and ‘Delivery’ – in 2011 updated the evidence base, action plans and, where appropriate, targets and Critical Success Factors (CSFs).

Overall, our review has found that LES 2006 did help catalyse progress in a number of areas:

- In relation to the economy with the adoption of an ambitious Visitor Plan and the hosting of major international events (Americas Cup and British Art Show);
- In ‘Britain’s Ocean City’, a clear and distinctive brand and hook for the city’s competitive advantages in marine technologies and related sectors;
- The increasing contribution of HEIs to business and employability agendas;
- The establishment of Derriford (including Plymouth Science Park) as a hub for knowledge-based firms and a focal point for commercial and residential development;
- In focussing the council on major investment programmes through the Plan for Jobs;
- The development of two Business Improvement Districts (BIDs) in the city centre and waterfront;
- Major regeneration in Devonport and North Prospect and large scale capital investments including the Life Centre;
- Continuing development of the city’s strong digital connectivity;
- Supply side improvements in workforce skills and increasing apprenticeship opportunities;
- Successful roll out of the Urban Enterprise programme with significant job creation outputs.

Despite progress, however, a number of challenges were also highlighted:

- Physical connectivity and accessibility – and the length of time it takes to deliver infrastructure investments needed to unlock growth potential, particularly against a fragile economic backdrop;
- Managing structural changes including the roles and functions of city centres in the face of retail revolutions;
- The future of MoD operations and estate and how this plays out positively in the overall reinvention of Plymouth as Britain’s Ocean City;
- The enduring deprivation of some local communities, particularly in the city’s ‘Western Arc’, and issues of fairness in terms of how wealth is distributed across the city.

There have been considerable changes in the economic landscape since 2006: LES 2006 was designed with the flagship project of creating a city Development Company in mind, and at a time when Regional Development Agencies were still operational. Looking forward, the LES review will form a key component of the emerging Plymouth Plan: the overall strategic framework for growth and development in the city up to 2031. Having a set of clear, refreshed economic goals will be crucial to the success of this ambitious project. Concurrent with this review and the wider Plymouth Plan process,





the city has been engaged with City Deal negotiations with Government, and with the Heart of the South West LEP in formulating an EU Structural and Investment Fund investment strategy (EU SIF) and Strategic Economic Plan (SEP).

These three processes will largely frame the public resources available to support economic growth and development in Plymouth over the medium term, and the freedoms and flexibilities available to deploy locally.

The review has highlighted three main areas of new opportunity for the city's economy:

- The **Plymouth and Peninsula City Deal**, focussed on exploiting the city and wider peninsula's unique strengths and assets to drive productivity led growth. It contains three proposals: a Marine Industries Production Campus (MIPC) centred on South Yard; Effective Business Support; and a Deal for Young People. The vision is to create an environment where businesses thrive, companies innovate and the commercial potential of our marine technology, knowledge and natural assets is harnessed to the greatest extent.
- Allied to this, **Mayflower 2020** will be a pivotal moment for the city's economy. If designed and delivered to be a dynamic and innovative event, it has the potential to drive forward many aspects of the city's economy – business growth in marine and related industries; the visitor economy; the culture of the city in its broadest sense; and raising the 'Ocean City' profile and reputation in global markets.

- Capitalising on the city's **Social Enterprise City** status as a driver of economic growth and community regeneration. The accolade recognises the extent and quality of social enterprise business activity in the city. In addition Plymouth University was the first institution in the world to be awarded the Social Enterprise Mark in recognition of its long-standing history of support for the sector. The University currently leads the national Social Enterprise University Enterprise Network.

Finally, our review highlighted both the significant challenges and opportunities associated with the shift towards a **low carbon economy**. The UK Government aims to reduce carbon emissions by 80 per cent by 2050 (compared to 1990 levels) with an interim reduction target of 34 per cent by 2020. These are substantial targets and Plymouth, like all cities, will need to play its part. The transition to a less carbon-intensive model of economic growth will have profound impacts on the way in which we all work and consume. As well as being an environmental and economic imperative, however, this shift is also an economic opportunity for residents and businesses alike.

Plymouth has among the lowest carbon emissions<sup>3</sup> of UK cities and, there exists a real opportunity to capitalise upon the its green credentials as a driver of growth and investment.

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<sup>3</sup> Cities Outlook (2014) Centre for Cities

# NEW APPROACH

In creating a more thriving economy, Plymouth needs to continue to play to its strengths. It needs to take account of what makes the city 'stand out' in an increasingly crowded global marketplace to foster and attract enterprise and investment. Our vision remains the same. The review recommends, however, that this vision is supplemented by a focus on the opportunity presented by Mayflower 2020 as a major milestone in the reinvention of Plymouth as Britain's Ocean City.

## OUR VISION

Britain's Ocean City: One of Europe's most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone

## OUR FOCUS

Mayflower 2020 – a premier UK event – presenting Britain's Ocean City to the world

Throughout our review, particular emphasis was placed on Plymouth's wider economic role as a well-functioning connected city, leading and supporting the peninsula. As well as being diversified and knowledge based, aspirations to be a more enterprising, innovative, creative and talented city were also expressed. Ensuring all people, communities and institutions participate fully in economic success remains an important theme. These areas of focus helped direct a new framework for delivery.





It is proposed that the five strategic themes of LES 2006 should be developed into a series of flagships with a greater degree of clarity and action focus.

Ocean City Infrastructure	Accelerating infrastructure delivery, creating the right environment for growth and investment
Digital Economy	Delivering the demand stimulation and business opportunities to make the most of the city's strong digital connectivity
Business Growth and Investment	Developing a coherent support offer to enable our businesses to become more enterprising, innovative and productive, excelling in global markets
Learning and Talent Development	A major civic approach to learning and skills development – driven by individuals, businesses and institutions, and supported by providers and civic society
People, Communities and Institutions	Harnessing the economic potential of the city's people and communities – connecting them to local assets, resources and support to create employment opportunities
Visitor Economy and Culture	Building on the Mayflower 2020 opportunity and the city's cultural and visitor offer to raise its profile and reputation in global markets

## Sustainable development

Cities that proactively respond to the business challenges and opportunities presented by the shift to a low carbon economy will be more competitive and resilient in the long term. The city already has a substantial reputation for sustainability, being recognised as one of Forum for the Future's leading 'green' cities. Furthermore, research has shown that the city's low carbon and environmental industries will outstrip growth in other industries by a significant margin over the decade to 2020<sup>4</sup>.

Our approach also recognises the importance of making sure the opportunities created by economic growth and development are shared fairly among the city's resident population. We will actively respond to the work of the Fairness Commission, which has been set up as an independent body to help make the city a fairer place to live and work.

<sup>4</sup> The Low Carbon and Environmental Economy in Plymouth (2011) RED Group, Plymouth Business School

Therefore, underpinning our six flagships and associated objectives and actions is a commitment to sustainable development, with the twin objectives of:

- Responding to the challenges and opportunities presented by the transition to a low carbon economy; and
- Ensuring the opportunities generated by economic growth and development are fairly distributed among the city's resident population.

## On sectors

LES 2006 targeted six priority sectors for accelerated growth and development<sup>5</sup>. Our review has concluded that output and employment growth since 2006 has been fairly broad-based with performance across these sectors mixed. Furthermore, our analysis of the city's productivity gap revealed underperformance across all industry sectors, suggesting a need to focus on the fundamental drivers of productivity. Therefore, our strategic approach to 2020 can be described as largely 'sector blind' – our 'Business Growth and Investment' flagship, for example, aims to support all city businesses with the potential to grow and generate productivity growth.

There remains a benefit, however, in focusing some interventions on specified industrial sectors where the city has a genuine competitive advantage and where market failure is constraining growth potential. The City Deal, for example, aims to unlock critical infrastructure to support Plymouth's marine and advanced manufacturing sectors where significant intellectual capital and business strengths exist.

## Strategic framework

For each of the identified flagships we have articulated the overarching ambition, economic rationale, and a series of strategic objectives and associated key actions to be delivered. It is important to recognise that the actions prioritised by this review are not static, nor do they reflect all activities undertaken by partners in delivering economic development. Therefore, while the overarching strategic framework will remain stable, the actions themselves will be more fluid, subject to periodic review and tweaked to incorporate new opportunities/interventions as they emerge.

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<sup>5</sup> Business services, Creative Industries, Tourism and Leisure, Marine Industries, Medical and Healthcare and Advanced Engineering

# OCEAN CITY INFRASTRUCTURE

Accelerating infrastructure delivery, creating the right environment for growth and investment



**Plymouth is a significant hub for the far South West, having an economic influence beyond its administrative boundaries. The concentration of businesses and people in a single place creates a range of economic benefits – larger and more diverse labour markets, knowledge ‘spill-overs’ between businesses, and lower costs in terms of market access.**

The city’s economy can only grow, however, with the right economic infrastructure to support it. When businesses make decisions to invest in markets, the reliability, cost and quality of local infrastructure (including housing and transport) are major considerations. Likewise, the quality of place is a critical factor in attracting and retaining talent.

While the city’s outstanding natural assets have the potential to attract investment, on the flipside, its physical peripherality means businesses are sheltered from the competitive forces that drive innovation and growth. It is estimated that every one hundred minutes travel time from London reduces productivity by six per cent<sup>6</sup>.

The recession of 2008/9 and its legacy have constrained the flow of investment to support medium and large-scale infrastructure developments. Therefore, the city faces a real challenge to develop and deliver projects that maximise returns to the local economy.

‘GVA per head’ is often used as a proxy for productivity; however, ‘GVA per hour’ is the purest measure, accounting for differences in commuting patterns, economic inactivity and part-time working between places. In 2012, Plymouth’s GVA per head was 82.5 per cent of the UK average compared to 92.7 per cent for per hour (ONS).

## 2006 to 2013

Under the ‘Centres’ theme, LES 2006 set out a series of objectives to address the critical success factor of delivering a range of **well-connected centres and nodes that drive complementary and mutually reinforcing components of the economy**. These were based on a bi-nodal approach: a multi-functioning city centre supported by significant complementary development at Derriford. Other actions included developing a meaningful accommodation offer; infrastructure to support investment and growth in knowledge-based sectors; and better connectivity with international centres.

Despite challenging economic conditions, a number of ‘big ticket’ infrastructure interventions have been delivered since 2006. Most recently, the Plan for Jobs included a number of major regeneration projects to boost local job creation supported by the creation of the Building for Jobs Investment Fund.

Consultation as part of this review reiterated concerns over physical connectivity and the length of time taken to deliver infrastructure investments. It also highlighted the challenge of managing major structural changes including the roles and functions of city centres (in the face of retail revolutions) and the future of the MoD estate.

<sup>6</sup> Meeting the productivity challenge (2005) University of West of England and University of Bath

# OUR APPROACH

Retaining the bi-nodal focus set out in LES 2006, our 'ocean city Infrastructure' flagship will place a particular (albeit not exclusive) spatial emphasis on the city's northern corridor and city centre and waterfront areas. Against this, we will focus on the following strategic objectives:

- Unlock critical infrastructure for marine sector growth and Mayflower 2020
- Optimise the economic potential of the city centre and waterfront
- Create the conditions for knowledge-based business growth
- Enhance the city's commercial and residential property offer
- Ensure Plymouth is 'well connected'

## Unlock critical infrastructure for marine sector growth and Mayflower 2020

The city and wider peninsula's marine and advanced manufacturing sectors represent areas of clear competitive advantage contributing around 14 per cent of national sector employment. We are recognised for our strength across these industries, with global companies and world-leading research institutions already based here. The South West was the first region to be designated as a marine energy park – the South West Marine Energy Park (SWMEP). Despite these strengths, availability of appropriate employment space for expansion or supply-chain co-location is limited. Providing the right infrastructure and linking this to the city's knowledge-base, is at the heart of our Plymouth and Peninsula City Deal ambitions.

A distinctive sense of place is a key factor in attracting talent, investment and visitors. As Britain's Ocean City, Plymouth needs the right infrastructure to support its ambitions and deliver a vibrant and successful visitor offer, particularly ahead of Mayflower 2020.

### To support this objective we will:

- Develop and deliver a Marine Industries Production Campus (MIPC) at South Yard to support marine and advanced manufacturing growth across the south west peninsula
- Deliver a Visitor Economy Capital Plan for key 'ocean city' infrastructure

## Optimise the economic potential of the city centre and waterfront

The city centre and waterfront area is vital to the success of our economy, providing high quality retail, higher education facilities, knowledge based and professional services employment, and serving as a cultural centre for driving growth and attracting visitors. Since, 2006, the city has successfully developed two Business Improvement Districts (BIDs) and, through individual business plans, these continue to be managed and delivered by the business-led City Centre Company and Plymouth Waterfront Partnership respectively.

The retail sector in our city centre represents around 25 per cent of total employment compared to just 5 per cent in London<sup>7</sup>. The growth of E-commerce and subsequent changes in consumer behaviour have brought new pressures to retailers. We need to adopt a co-ordinated holistic approach to developing a modern 21st Century city centre, delivering the right infrastructure to support new strengths, improve resilience, and diversify our offer to meet changing demand.

### To support this objective we will:

- Develop and deliver a City Centre Diversification Programme, prioritising key strategic infrastructure to unlock economic growth

## Create the conditions for knowledge-based business growth

Modern city economies rely increasingly on knowledge and innovation – to remain 'cutting-edge', businesses need to continually develop their products and services. Infrastructure plays an important role in supporting knowledge-based growth, creating the conditions for so-called 'clustering' and the exchange of ideas. We will explore the opportunity of developing a City Centre Innovation Centre to create a 'shop window' for innovation as well as a supportive and collaborative environment for knowledge intensive business growth.

The Derriford area of the city provides a focal point for further growth of the knowledge economy, being home to Plymouth Science Park, Plymouth International Medical and Technology Park, Derriford Hospital with links to our two universities. Plymouth Science Park, in particular, has been successful in attracting a large cluster of high profile firms –

<sup>7</sup> Business Register and Employment Survey (2012) ONS

the opportunity to collaborate with companies with common interests and the quality of the built environment, were key drivers.

#### To support this objective we will:

- Deliver new infrastructure to foster business innovation, including a new City Centre Innovation Centre
- Facilitate further high-value employment growth at Plymouth Science Park through Phase 5
- Unlock new strategic employment space at Plymouth International Medical and Technology Park

## Enhance the city's commercial and residential property offer

The city's recent Strategic Property Review emphasised the importance of building a pipeline of commercial development projects and programmes of private sector stimulation to deliver investment into the city. This will be supported by a refreshed Employment and Land Review which assesses the land available to support economic growth. Together they will inform a refreshed approach to prioritising and delivering capital investment across the city, brought together in a new Investment Prospectus.

In addition, housing plays an important economic role both in directly boosting economic growth (through construction and job creation), attracting and retaining skilled workers, and addressing issues of economic inclusion. In particular, we will continue to support the ground-breaking development of Low Carbon Housing and Green Hub Incubators at Bickleigh to establish Plymouth as a national centre for mass produced zero carbon homes. Our approach will fully complement ambitions set out in the city's Housing Plan 2012-17.

#### To support this objective we will:

- Develop a city-wide Investment Prospectus, prioritising capital projects with the greatest economic returns
- Support delivery of city's Housing Plan to ensure new homes support low carbon growth, economic competitiveness and future prosperity

## Ensuring Plymouth is 'well connected'

Investment in transport infrastructure is fundamental to economic success – good connectivity supports the effective functioning of our economy, enabling residents to access employment opportunities and linking businesses to markets for skills, customers and supply-chains. Plymouth is the most significant urban area on the south west peninsula yet it is cut off from the Strategic National Corridors and has relatively poor rail and air services.

Climate change is likely to lead to more extreme weather events in the future, placing considerable pressure on our infrastructure and weakening our physical connectivity. In recent times, major flooding events and strong winds have caused disruption to the functioning of our economy, with businesses experiencing significant economic costs. We need to work with sub-regional partners to invest in new resilient and 'future proofed' infrastructure.

The city's Local Transport Plan (LTP) 2011-26 sets out the city's vision for improving connectivity, while the recently published draft HotSW Strategic Economic Plan (SEP) articulates a sub-regional approach.

#### We will work with sub-regional partners to:

- Lobby for reduced rail journey times, electrification, track and signalling enhancements, and improved capacity
- Improve resilience of strategic road and rail routes to and within the peninsula
- Unlock growth potential of Derriford through delivery of the Forder Valley Link Road and Derriford Junction

# DIGITAL ECONOMY

Delivering the demand stimulation and business opportunities to make the most of the city's strong digital connectivity



**Plymouth has clear competitive advantages in digital connectivity and is comfortably above the UK average for superfast broadband speeds and coverage<sup>8</sup>. Ensuring all of our businesses and residents have access to and exploit high quality and high speed internet access is critical to the effective functioning of our modern digital economy.**

The economic benefits of digital technologies are well documented both as a sector in its own right and as key enablers across the wider economy. Businesses working in the digital economy can make a significant contribution to productivity-led growth: they are typically highly innovative in terms of both products and services and strong exporters, operating in global markets. Digital businesses generate significant spill-over benefits to other industries and these in turn stimulate further productivity gains and job creation.

The Information Economy Strategy 2013 sets out a roadmap for harnessing the UK's competitive strengths in information and communication technologies to 'accelerate in the global race'. It identifies three broad areas of opportunity: 'The Data revolution' (transforming business sectors by rich-datasets, analytics and modelling); 'E-commerce' (more businesses trading on line); and 'Mobility and Connectivity' (The internet of things – people, objects and devices networking and communicating).

## 2006 to 2013

LES 2006 focussed on Plymouth's role as a regional centre and the importance of maximising its physical and digital connectivity networks. It recommended considerable investment in digital infrastructure as well as measures to boost demand stimulation and encourage effective utilisation.

A thematic 'Business' review in 2011 highlighted the growing importance of digital infrastructure in supporting economic growth and recommended its prioritisation above other priority sector interventions. Through Digital Plymouth, Plymouth City Council, the Chamber of Commerce and other public and private sector partners continue to work together to ensure our businesses and residents take full advantage of superfast broadband technology wherever possible. The recently launched Plymouth Get IT together programme aims to create 10,000 new regular internet users by 2018.

**Small businesses that go online grow twice as fast as their competitors and for every job lost by companies embracing new digital technologies, more than double are created in the wider economy (McKinsey, 2011).**

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<sup>8</sup> Cities Outlook (2014) Centre for Cities



# OUR APPROACH

Our review has confirmed the digital economy as a significant area of potential for Plymouth and a 'flagship' in its own right, albeit recognising considerable cross-over with others. The web fuelled elements of the City Deal and Growth Acceleration and Investment Network (GAIN) proposals, for example, will deliver digital support for increased exports. In a sense, the digital economy approach is more granular than a priority sector approach, as it can improve performance across most sectors.

Digital Plymouth is currently developing a bespoke Plan for Digital which will enable the performance management of the economic aspects (embedded within this flagship) of its vision to 2020.

We will focus on the following strategic objectives:

- Unlock barriers to digital connectivity among businesses and residents
- Support development and retention of digital skills and entrepreneurs
- Exploit new digital technologies and innovations

## Unlock barriers to digital connectivity among businesses and residents

Although the city has strong digital connectivity, there remain opportunities to further maximise the spread, quality and benefit derived from broadband by businesses and residents within the city and its travel to work area. We will deliver 'best in class' digital connectivity as standard for new developments in the city.

Around 36 per cent of small and medium enterprises (SMEs) in the UK have no website. Of the 64 per cent of SMEs who do have a website, 15 per cent of those have no functionality beyond simply finding out information<sup>9</sup>. SMEs reporting frequent use of the internet were more than twice as likely as those who used it less often to have recorded an increase in turnover over the last two years. Through the Plymouth and Peninsula City Deal we will help our SMEs embrace new technologies to exploit new market opportunities.

<sup>9</sup> Britain's Digital Opportunity (2013) Lloyds Banking Group

### To support this objective we will:

- Ensure all of our business parks are connected to Superfast broadband
- Increase levels of web-fuelled business exports for SMEs
- Deliver free Wi-Fi connectivity in public areas across the city

## Support development and retention of digital skills and entrepreneurs

Creating the high-performance digital businesses of tomorrow requires the retention of high-level ICT skills in the local economy. Our ambition is for Plymouth to become a regional hub for high-technology digital companies. High-potential tech start-ups and small businesses in the information economy sector can face particular barriers in accessing the finance to grow into medium and large-sized firms. We will explore the potential for a city first Digital Skills Academy to foster the growth of digital entrepreneurs, including 'spin outs' from our higher education institutions.

By 2020, ninety per cent of all jobs will require ICT skills and the majority of public services will be delivered online<sup>10</sup>. It follows that basic ICT access and skills will become a necessity for all in terms of connecting to economic opportunities, particularly those living in our most deprived communities. Businesses increasingly require digitally literate employees to make the best use of opportunities afforded by the digital economy.

### To support this objective we will:

- Increase retention of digital skills and entrepreneurs, including through a Digital Skills Academy
- Facilitate access to the web for all citizens
- Deliver multi-level ICT training provision including basic ICT skills

<sup>10</sup> Go ON UK: The UK's Digital Skills Alliance <http://www.go-on.co.uk/>

## **Exploit new digital technologies and innovations**

The so-called 'digital revolution' has gained significant pace in recent years. By 2012, over 2 billion people used the Internet, twice the number using it in 2007. Digital technologies have underpinned and played a significant role in the overall growth of the service economy. The European Commission suggested in 2005 that 75 per cent of all EU-wide process innovations between 2004 and 2005 were directly related to or enabled by ICT.

Cities are at the heart of economic growth and new digital services provide a foundation for the knowledge economy. Developments in web services technologies, the 'internet-of-things' and cloud computing all offer a new wave of opportunities to revolutionise an integrated urban infrastructure, both digital and physical. To reap the economic rewards available from a rapidly developing digital economy, we need to ensure that business and residents alike are able to tap into new technologies and innovations.

### **To support this objective we will:**

- Ensure the city remains responsive to new digital innovations to drive resource efficiencies and economic growth

# BUSINESS GROWTH AND INVESTMENT

Developing a coherent support offer to enable our businesses to become more enterprising, innovative and productive, excelling in global markets



**Long term economic success is built on the productivity of our businesses and workers. Productive businesses, including social enterprises, create more employment opportunities at higher levels of pay, produce higher quality goods and services, and generate the lion's share of wealth for the city.**

Compared to other city economies, our industrial base can be described as being comparatively 'light' on higher value knowledge-based sectors and 'heavy' on public sector. In addition, rates of productivity are generally lower than average across all of our industries. At the heart of our 'Business Growth and Investment' flagship, therefore, is a focus on supporting business through the drivers of productivity and competitiveness.

To reach its economic potential, the city needs to create a strong and vibrant business culture characterised by high rates of start-ups and investment (both among our existing businesses and by those choosing to locate here) and where our most aspirational and 'cutting-edge' businesses are able to develop new products and exploit new market opportunities internationally. To support this, businesses need the right climate where advice, intelligence and networks are available to help them make informed decisions about their growth ambitions. This is important for businesses of all shapes and sizes – SMEs and micros which make up the bulk of the city's stock, and larger businesses which, although smaller in number, make a significant contribution to our employment<sup>11</sup>.

Businesses in the city tend to be insular in trading terms – research ranked Plymouth in the bottom 5 per cent of local authorities on the 'proportion of exporting businesses', and bottom 20 per cent on 'exporting potential' (Experian, 2011)

## 2006 to 2013

The Business theme of LES 2006 set out to address the critical success factors: 'improve productivity and competitiveness', 'create a diverse and growing business base' and 'a high proportion of knowledge based activities and innovation within businesses'. Activity included boosting inward investment by improving Plymouth's investor offer; programmes to promote entrepreneurship among young people; and the development of six priority sectors.

A review in 2010, refocused activity on: provision of start-ups through the Growth Acceleration and Investment Network (GAIN) and Urban Enterprise programme; a Business Relationship Programme for the city's largest companies; prioritisation of marine (and renewables) and advanced manufacturing; and developing the city's investor offer.

The Plymouth and Peninsula City Deal sets out new ambitions to further rationalise and improve the business support landscape through the GAIN Growth Hub, with targeted support to help grow SMEs and the city's marine sector.

<sup>11</sup> Businesses by employees: Sole Traders (0 employees); Micros (0-9 employees); Medium-sized (10-249); Large (250+)

# OUR APPROACH

Our flagship will build on the progress made since 2006 and, in particular, the momentum generated by the City Deal, to support our businesses in becoming more enterprising, innovative and productive. We will work in partnership to effectively engage our businesses and ensure resources are targeted where the greatest returns can be achieved.

We will focus on the following strategic objectives:

- Create an integrated and accessible business support offer
- Increase the number of business start-ups
- Support innovation and knowledge-based growth
- Raise the proportion of city businesses exporting
- Attract and support new business investment

## Create an integrated and accessible business support offer

The business support landscape has changed rapidly in recent years and our survey evidence suggests that it is currently perceived as fragmented and confusing. GAIN, founded by Plymouth University, with Plymouth City Council and Plymouth Science Park, is a Growth Hub bringing together business infrastructure, world class research facilities and expertise in a network focused on growth and investment<sup>12</sup>. It seeks to join up physical assets, services and products to assist people with ideas, business that want to grow and create deal flow for investors.

Building on GAIN, we will draw together resources from across the city to provide a clear and accessible offer for all businesses looking for start-up support, advice, guidance and signposting. We will help unlock the potential of our SMEs and work proactively with larger businesses to encourage them to grow and reinvest locally. Furthermore, we will ensure businesses have access to the necessary information to respond positively to the challenges and opportunities presented by the transition to a low carbon economy.

<sup>12</sup> The initiative has featured prominently in both the Witty Review of universities and growth, and BIS Research Paper #156 on understanding localised policy interventions in business support and skills.

### To support this objective we will:

- Establish a single point of contact for all business support through the GAIN Growth Hub
- Support SMEs and micros through better information and co-ordination on procurement, premises, planning and business advice
- Support businesses to remain and prosper locally through a Business Relationship Programme
- Target support to our marine and advanced manufacturing businesses

## Increase the number of business start-ups

Plymouth has historically recorded low rates of business births reflecting a (generally) less entrepreneurial and risk averse business culture<sup>13</sup>. The city tends to see more sole-trader start-ups than other cities, but these businesses are rarely growing to the point where a significant contribution to employment is made. Creating an environment more conducive to start-ups will help drive the competitive forces necessary for productivity and employment growth. We need to grow our aspirations for enterprise to ensure starting a business is considered a viable career path for our residents regardless of background and circumstance.

In addition, our approach will build on the assets, talent and expertise of our HEIs. The newly established Futures Centre for Entrepreneurship, for example, will provide a space for connecting students, academics, researchers and entrepreneurs to create innovative solutions to economic, social and environmental challenges.

### To support this objective we will:

- Deliver a Business Creation Programme, supporting and investing in new ideas
- Encourage more HE and FE business 'spin-outs'
- Increase business start-up opportunities for residents living in the city's most deprived communities

<sup>13</sup> See for example Plymouth's Economic Review Issue 2 (2012) Plymouth Growth Board

## Support innovation and knowledge-based growth

Innovation relates to the development of new products and processes and is a key driver of productivity. Research has found that growth rates of innovative businesses are significantly higher than non-innovative ones<sup>14</sup>. Successful innovation requires a supportive physical space and the creation of networks in which knowledge and ideas can be shared.

The city's HEIs represent a significant pool of knowledge and innovative potential – both Plymouth University and the University of St Mark and St John were recognised in the recent Witty Review for business-university collaboration strengths. Our innovative potential in marine and renewable energy (linked to the Marine Innovation Centre (MARIC) and world-class research institutes like Plymouth Marine Laboratories) is at the heart of our City Deal.

### To support this objective we will:

- Help our 'cutting-edge' businesses develop new products and processes
- Create the physical environment for innovation through a new City Centre Innovation Centre
- Build networks and clusters of high-value marine and advanced manufacturing businesses and supply-chains (linked to the MIPC)
- Promote best practice in continuous improvement and resource efficiency through a potential Regional Centre for Lean Leadership and Resource Efficiency

## Raise the proportion of city businesses exporting

Businesses that export tend to experience higher levels of productivity, improved competitiveness in domestic markets, and by tapping into global markets, greater incentives to innovate<sup>15</sup>. Plymouth shares the south west peninsula's low levels of trade engagement with businesses, on average, relatively insular. Our aim is to help more businesses to start trading internationally and to help those currently exporting to exploit new markets.

### To support this objective we will:

- Increase first stage exporting through targeted support
- Develop trade links with US businesses, culminating in a Mayflower 2020 trade expo

## Attract and support new business investment

Attracting new businesses to the city delivers clear economic benefits in terms of new employment and output creation. We will work with partners across the Peninsula, adopting a proactive and co-ordinated approach to securing new inward investment. In doing so we need to sell our strengths as Britain's Ocean City, where our quality of life, low carbon/marine credentials, social enterprise strengths and extensive talent pool, represent significant hooks for new investment.

Business survey evidence suggests that access to finance remains a key barrier to business growth, exacerbated by the credit crunch and subsequent recession of 2008/9. Our approach will be to support ambitious businesses already located in the city find the necessary finance to invest and become more productive.

### To support this objective we will:

- Target and support new inward investments through a co-ordinated, 'can-do' approach
- Deliver an investor readiness programme to support business plans and investment pitches
- Create a single access to finance platform for business through a GAIN Growth Hub,

<sup>14</sup> BIS Analysis Paper No 2: SMEs: The Key Enablers of Business Success and the Economic Rationale for Government Intervention. December 2013  
<sup>15</sup> Plymouth's Economic Review Issue 2 (2012) Plymouth Growth Board

# LEARNING AND TALENT DEVELOPMENT

A major civic approach to learning and skills development – driven by individuals, businesses and institutions, and supported by providers and civic society



*To touch  
new worlds  
through the  
resolution of water  
we ride waves of air &  
tides of sun and moon*

THIS BUILDING WAS OPENED ON 30 OCTOBER 2012 BY  
HRH PRINCE PHILIP THE DUKE OF EDINBURGH

**There is a wealth of evidence that medium and high-level skills are significant drivers of productivity, both directly in terms of improving individual performance and, indirectly, by equipping people with the tools to generate new ideas and practices. Skills raise levels of innovation, in turn, unlocking new markets and driving up the competitiveness of businesses.**

The knowledge-based value added economy of the future, however, requires a solid foundation of people with basic skills who are able to make the most of rapid technological and process change. Therefore, the productive employment of all individuals across the skills chain is fundamental to the city's long-term growth prospects.

Our evidence review reveals considerable progress made since 2006 on a range of employment and skills indicators. The proportion of the city's workforce qualified to level 4 (degree equivalent) or above rose significantly, while the proportion of workers with no qualifications fell over the same period. Despite this progress, however, our productivity performance remained weak suggesting high-level skills are not being productively employed. Research has also shown a continued 'leakage' of graduates from the city to other labour markets. At the other end of the spectrum, a significant forty per cent of young people still leave school without five good GCSEs and the proportion classed as NEET<sup>16</sup> remains above the South West regional average. Employability skills are a major issue for the city at all levels (school leavers to graduates).

Our challenge is to build on our strengths whilst also overcoming persistent weaknesses, to ensure the city's workers and residents are equipped with the skills and job-readiness demanded by colleagues to thrive and add value to the local economy. Our approach responds to three long-term aims:

- Retaining and maximising Plymouth's talent: focussing on interventions to raise the attractiveness and pull of the city for high level skills;
- Matching labour market skills demand with training and education supply: ensuring all individuals are productively employed and the offer is right across the sub region; and
- Up-skilling Plymouth's workforce and those seeking to enter the labour market: maximising participation for all of the city's residents.

The city's further and higher education institutions make a significant contribution to the city's economy, together supporting 3,700 FTEs (5,830 indirect), over 38,000 students and contributing GVA of £289m – 7 per cent of the city's total (SERIO, 2010)

## 2006 to 2013

Our 2006 LES warned that Plymouth did not possess a skills base of sufficient quality to enable development as a world-class knowledge based economy. To address this, a Skills theme proposed objectives to address three key critical success factors: 'a high quality, adaptable skills base', 'high levels of attainment' and 'a positive and aspirational culture'.

A Skills review in 2011 refined these priorities to focus on: targeted support for young people (before entering labour market); supporting jobseekers and those at risk of redundancy; boosting adult workforce skills; and ensuring adequate supply of skills to meet demand from major investments. The evidence base continued to show relatively poor performance in the region, and below the national average, for NEETs and Public Health indicators, citing youth unemployment as a critical factor undermining the city's health, well-being and resilience.

More recently, the Plan for Jobs included a number of skills-related interventions: local labour procurement for major interventions; supporting young people into employment through the 1000 Club; and plans for a new Apprenticeship Training Agency. Other key supporting activities include the creation of a University Technical College, continued support and improvement in post 16 vocational qualifications, and a range of graduate retention programmes through our HEIs.

The Plymouth and Peninsula City Deal proposes a number of new projects/activities through a Deal for Young People aimed at addressing youth unemployment and raising incomes for young people.



# OUR APPROACH

Concurrent to our review, a Skills Partnership Task and Finish Group has been set up to establish a new Employment and Skills Board (ESB) for Plymouth. An employer-led partnership, the ESB will provide local strategic leadership in setting the city's priorities for employment and skills provision.

Our 'Learning and Talent Development' flagship will be delivered through Plymouth's Plan for Employment and Skills (2014-20). In addition, a Learning, Skills and Employability group has been established: accountable to the ESB when formed and the Children and Young People's Partnership, its focus will be on creating and sustaining a high quality pathway of learning and opportunity across schools, FE, HE and training providers.

We will focus on the following strategic objectives:

- Match skills with demand
- Drive entrepreneurship and innovation
- Improve core skills
- Prepare for work and address worklessness

## Match skills with demand

Skills mismatches can occur when the educational and skills system is unresponsive to local demand. This results in skills gaps and shortages which weaken the labour market. Therefore, to ensure our residents are productively employed and the needs of the local economy met, we need to create an 'employer-led' system which is both flexible and responsive. This will integrate and simplify all existing support and use local labour market intelligence to better understand the nature of future employment and skills demand.

We will build on the momentum generated by the Plymouth and Peninsula City Deal, to develop a skills matching service with an associated physical hub and web portal. The service will integrate all existing Information, Advice and Guidance (IAG) into a single seamless offer provided by an impartial 'honest broker'.

### To support this objective we will:

- Create a single skills matching service with a physical 'hub' presence in the city
- Build into this 'hub' an action plan and resourcing for dedicated business and education engagement

## Drive entrepreneurship and innovation

To address the city's underperformance on business start-ups and its poor rates of graduate retention, our 'Learning and talent development' flagship will support measures to promote a culture of entrepreneurialism and continuous learning. This is vital for both the continued and sustainable growth of businesses as well as personal development. Our approach will seek to build upon and develop opportunities post-learning, while also embedding a more enterprising culture within the education system.

To achieve this we need to place the assets, facilities, talent and expertise of our higher and further education providers at the heart of business growth in the city. We will build upon the graduate initiatives undertaken by our universities and colleges including Plymouth University's Enterprise Solutions, the work of city College as a Gazelle Enterprise College, and employability and enterprise activities undertaken by the University of St Mark and St John.

### To support this objective we will:

- Expand degree level entrepreneurship modules and graduate retention programmes in colleges and universities
- Co-ordinate mentorship among new and potential entrepreneurs and young people through the business community
- Establish an employer ownership of skills pilot to upskill the workforce in high growth marine and advanced manufacturing sectors
- Develop advanced leadership and management skills to unlock growth potential of existing businesses

## Improve core skills

In developing a more skilled and productive city workforce, we need to ensure that residents and workers have the core skills required to thrive and prosper in their careers. Plymouth's Fairness Commission's Position Statement<sup>17</sup> highlighted as a key issue of 'unfairness' the differing quality of education provision and the attainment gap between children in terms of basic numeracy and literacy.

Our approach recognises the importance of other core skills such as ICT (to make best use of the opportunities afforded by the digital economy), STEM (to meet the needs of local employers) and so-called 'Green Skills' (in the transition to a low carbon economy).

### To support this objective we will:

- Support activities focussed on early years and primary education skills development including improved reading and literacy as core
- Promote and develop STEM and related low carbon skills for businesses, using these as a means of developing employability
- Increase retention of digital skills and deliver multi-level ICT skills training

## Prepare for work and addressing worklessness

It is imperative that our prospective workers are equipped with the skills demanded by businesses across the city. Employers frequently cite the need for greater 'job-ready' skills such as team-working, problem-solving, and customer and communication skills, among young people leaving education. Our approach, therefore, is to support the overarching goal of improving the work readiness of all leaving education and supporting the journey to employment. This will be underpinned by a full review of Plymouth's 11-18 skills and training offer to ensure providers are meeting the needs of the city's economy and employers.

The Deal for Young People will create a single web-based careers portal to provide instant access to the latest jobs, courses and training opportunities, further expanding and promoting schemes aimed at delivering this goal. As part of this, the city will launch the largest Wage Progression Project in the country aimed at boost the earnings and career prospects of young people.

### To support this objective we will:

- Undertake a city-wide review of the city's 11-18 skills training offer
- Rationalise 'employability passports' and roll out through further and higher education
- Assess the feasibility of a new vocational Apprenticeship Academy
- Establish a Wage Progression Pilot to support young people who have recently secured work

<sup>17</sup> See <http://www.plymouth.gov.uk/homepage/fairnesscommission.htm>

# PEOPLE, COMMUNITIES AND INSTITUTIONS

Harnessing the economic potential of the city's people and communities – connecting them to local assets, resources and support to create employment opportunities



**Cities face two key economic challenges: creating and sustaining economic performance and ensuring the connectivity of all residents and communities to the opportunities this brings. While the functional economy of Plymouth contributes significantly to output and employment across the south west peninsula and beyond, like many UK cities, it is also where substantial economic and social challenges concentrate.**

Within Plymouth, there exist communities that have experienced consistently higher rates of economic inactivity and unemployment – including youth and long-term – alongside a plethora of other deep-rooted socio-economic issues including health. Despite positive interventions, fundamental issues affecting the city's most deprived communities (particularly its 'western arc') remain. New jobs in the city will improve the economic prospects for local people, and there is a proven link between higher income levels and better health.

**Around one in five households in the city are classed as workless, which is above corresponding regional (SW) and national (UK) averages (ONS, 2013)**

## 2006 to 2013

Under an 'economic inclusion' theme, LES 2006 set out to achieve a virtuous circle whereby a more competitive city economy would bring about significant improvements in the circumstances of those living in the poorest wards, reinforcing economic growth through greater participation, higher skills levels and higher incomes.

Our 2011 review concluded that actions should be refocused on individuals and their ability to find and enter employment. The review also highlighted market failures around 'imperfect information' in terms of the unemployed (and those at risk of unemployment) accessing services such as enterprise start-up support. To some extent, the Plan for Jobs picked up on a number of these actions, including through a: 'Proactive approach to planning' aimed at securing additional apprenticeships and local labour agreements in infrastructure projects; and commitments by the Council to increase the utilisation of local SMEs and suppliers through its expenditure.

The city's Fairness Commission, launched in April 2013, was set up independently to help make the city a fairer place to live and work. Following a 'Summer of Listening', the Commission published its position statement covering three themes: 'Helping Individuals and Families', 'Creating Stronger Communities' and 'Growing the Local Economy'.



# OUR APPROACH

The 'people, communities and institutions' flagship will include specific actions designed to support the connection of local people to physical assets and financial resources that lead directly to the creation of new employment opportunities. The Plymouth Plan will integrate the structures, services and relationships that knit individuals and communities together with place. It will enable partners to support livelihoods, build social capacity and improve outcomes for the most marginalised communities.

We will focus on the following strategic objectives:

- Effective community enterprise and employment support
- Support the growth of social enterprises
- Connect businesses and individuals to local procurement opportunities

## Effective community enterprise and employment support

To create a growing and fair economy, we need to support and empower communities to develop the economic opportunities most suited to their need. Individuals living in our most deprived areas often face a multitude of barriers to participating in the economy. Those who have been disengaged from the labour market for some time, require more intensive support to help them re-connect. It is therefore imperative that our employment and skills interventions are responsive to this.

### To support this objective we will:

- Deliver on plans to develop a Community Economic Development Trust (CEDT) in the north of the city, maximising economic benefits to residents
- Identify resources for and co-ordinate a dedicated funding team to secure investments for community enterprise and local employment support
- Maximise benefits of our Deal for Young People by identifying, streamlining and targeting existing employment, skills and employability initiatives to support our most disadvantaged residents
- Support entrepreneurs by bringing vacant and under-utilised buildings back into productive use through the Plymouth Your Space project, promoting links to the Community Asset Transfer Policy

## Support the growth of social enterprises

Social enterprises make a valuable contribution to the local economy both in terms of output and employment. In addition, they deliver benefits to the overall 'wealth' of the city's economy through a range of social and environmental objectives. Whilst operating in competitive markets like any business, social enterprises demand a more bespoke level of support to help them become more sustainable.

Plymouth's social enterprise strengths were recognised by being awarded Social Enterprise City status. In addition, Plymouth University was the first institution in the world to be awarded the Social Enterprise Mark in recognition of its long-standing history of support for the sector. Our approach is therefore geared towards building upon this opportunity.

### To support this objective we will:

- Explore potential for a Social Enterprise Zone
- Co-ordinate innovative funding opportunities, targeted at local bottom up economic initiatives and social enterprises

## **Connect businesses and individuals to local procurement opportunities**

Feedback from the Fairness Commission Select Committee indicated concern about local procurement and highlighted the potential for small businesses to have a visible role in influencing policy in this area. We want to ensure that SMEs have the knowledge and skills required to access local procurement and tendering opportunities.

Furthermore, we need to ensure that employment opportunities arising from developments and investments are available to our residents. This applies to major developments both within the city (including through our City Deal) across the wider south west peninsula such as Sherford and Hinkley.

### **To support this objective we will:**

- Identify good practice models to drive innovation in Corporate Social Responsibility (CSR) and partnership working in support of local enterprise, entrepreneurship and employability
- Create new opportunities to embed 'social value' in public sector commissioning and procurement practices
- Boost levels of local procurement and connect residents to opportunities arising from major developments and inward investments

# VISITOR ECONOMY AND CULTURE

Building on the Mayflower 2020 opportunity and the city's cultural and visitor offer to raise its profile and reputation in global markets



**The role of arts-led regeneration, creativity and active living remains a defining feature of successful waterfront cities. Mayflower 2020 – if pitched at the highest level of ambition – can act as a key milestone/enabler for the city’s profile and reputation in global markets, and for driving the city’s economy.**

Quality of life and ‘place making’ play important roles in influencing local labour markets and competitiveness. Highly skilled workers and businesses are attracted to areas with a strong cultural offer and with a high proportion of people working in creative occupations. Strong and distinctive branding boosts inward investment – enabling a city to stand out in an increasingly competitive marketplace. ‘Britain’s Ocean City’ provides this hook.

The visitor economy in Plymouth contributes significantly to the city’s wealth, supporting over 8,000 of its jobs (7 per cent of total). Visitor spend boosts local demand, effectively raising business export revenue and generating multiplier effects through supply-chains and local spending of tourism wages.

The city has a relatively young but dynamic and fast growing creative sector with huge opportunities for further business creation and entrepreneurship. Our research shows that business within the sector typically demand high-skills/wages and have high employment growth potential. Within the creative, leisure and tourism sectors, Plymouth has significant strengths in audio and visual arts publishing, and leisure and sporting facilities, reflecting the presence of ‘household names’ such as the Theatre Royal Plymouth, TwoFour Productions, BBC South West, and Denham Productions.

There is an estimated 173 creative industry enterprises in the city with a mean turnover of £71,000. The sector is expected to grow at a faster rate than the city’s industry average between 2014 and 2031 (Plymouth Culture Index 2013 and RED Group)

## 2006 to 2013

LES 2006 included the aspiration to become a competitive city, well recognised and branded on the global economic stage. It talked about the city’s outstanding waterfront setting and its potential to deliver significant economic benefits through attracting people and businesses, as well as significant leisure and tourism activities. It envisaged Plymouth as: ‘the high technology hub’, supporting high tech, knowledge based sectors; and ‘the national events capital’, positioning the marine and lifestyle assets as a cornerstone for promoting international visiting.

Our review has reaffirmed the importance of the visitor economy and culture, acknowledging progress in this area, including:

- Development of a clear and distinctive brand in Britain’s Ocean City, serving as a hook for the city’s competitive advantages in marine technologies and related sectors;
- The adoption of a fifteen year Visitor Plan with ambitious targets to grow visitor numbers and spend through ‘star’ projects: Signature and Major events, Royal William Yard, Commercial Wharf and the Telling Stories initiative;
- The successful hosting of the America’s Cup and British Art Show confirmed the city’s ability to be a ‘national events capital’;
- The creation of Plymouth Culture Board to deliver the city’s Cultural Strategy (The Vital Spark 2009-20) in partnership with a range of public and private sector partners;
- The delivery of cultural/leisure infrastructure projects like the Life Centre, Theatre Royal redevelopments, Home Park and Pavilion.



# OUR APPROACH

Mayflower 2020 will be a pivotal moment for the city of Plymouth. If designed and delivered to be a dynamic and innovative event, it can act as a real driver of many aspects of the city's economy – business growth in marine and related industries/services; the visitor economy; the culture of the city in its broadest sense; and raising the 'Britain's Ocean City' profile and reputation in global markets.

We will focus on the following strategic objectives:

- Raise the profile of 'Britain's Ocean City' in global markets
- Grow the city's visitor economy
- Unlock the potential of the city's creative sector and cultural heritage

## Raise the profile of 'Britain's Ocean City' in global markets

A city's brand plays a crucial role in showcasing to the world its unique strengths and aspirations. Few cities can rival Plymouth's rich seafaring heritage, its stunning waterfront and natural harbour; its vibrant cultural life and its close proximity to some of the most beautiful countryside in the UK. Mayflower 2020 provides a unique, once in a lifetime opportunity to present 'Britain's Ocean City' to the world and maximise the impact of our assets.

### To support this objective we will:

- Establish an executive function and joint level of ambition between UK and US for Mayflower 2020 and its legacy
- Develop and deliver a Mayflower 2020 Major Events Programme

## Grow the city's visitor economy

Today's visitors are footloose, sophisticated, well-travelled and looking for distinctive and new experiences. We need to be clear about what that means for Plymouth and where the real opportunities lie. The Visitor Plan, led by Destination Plymouth, sets out how the city can achieve its potential as a destination and use the opportunities of the visitor economy to lead and support city-wide aspirations and priorities. Our approach is to build upon the foundations put in place by this plan and refocus efforts ahead of the Mayflower 2020.

There will be a growing need to raise productivity across tourism and leisure sectors through capital (digital/technology) investment. Technological advancements will be used increasingly to segment and understand customers and offer them more relevant choices.

The 'carbon footprints' of both tourists and attractions can have a significant impact on the overall footprint of an area. Many of our top tourist attractions are recognised for their commitments to a low carbon economy, for example, the National Marine Aquarium, Theatre Royal Plymouth and many of our hotels. There is potential to share this good practice and to use our low carbon, high quality of life offer as a selling point to businesses and visitors.

### To support this objective we will:

- Refresh city's Visitor Plan to support Mayflower 2020 ambitions
- Deliver key infrastructure through Visitor Economy Capital Plan including gateways, hotels and public transport
- Exploit digital technologies to enhance the city's visitor offer
- Promote and share best practice in low carbon management for tourism and leisure

## Unlock the potential of the city's creative sector and cultural heritage

Plymouth is recognised as having diverse and innovative industries which includes creative and digital media, audio-visual, design, TV and film production and visual arts, music technology and software games development.

The cultural and creative economy provides jobs, supports the visitor economy, and helps shape the city's identity and profile. The Vital Spark, led by Plymouth Culture Board, places culture at the heart of Plymouth's ambitions to ensure it fulfils its potential as a distinctive, dynamic cultural centre of regional, national and international renown.

### To support this objective we will:

- Refocus cultural priorities to Mayflower 2020, through a refresh of the Vital Spark
- Support creative industries start-ups, including digital, gaming and audio/visual arts
- Expand the city's cultural infrastructure, including a 'world class' history centre



# LEADERSHIP AND DELIVERY MANAGEMENT

**The flagship interventions recommended by this review have been designed to refocus the city's resources on a smaller number of impactful interventions. By the time of Mayflower 2020, we will have delivered on a whole package of projects designed to take the city's economy to a new level of focus and ambition.**

Reaping maximum economic returns from these requires strong leadership, institutional and personal buy-in, and robust action planning and performance management. Our approach to this review has been one of co-design, working through the Plymouth Growth Board (PGB) to engage a range of stakeholders across the city and beyond. The positive energy and momentum generated needs to continue into delivery.

## Governance

The strategic objectives and flagships identified by the review of the Local Economic Strategy will be taken forward as key components of the Prosperity and Affordability Theme of the Plymouth Plan and their implementation will be co-ordinated and performance managed by the PGB.

### Plymouth Growth Board

The Plymouth Growth Board is a private sector led partnership with membership drawn from the private, public and community sectors. Its purpose is to drive forward the economic priorities and the growth agenda for Plymouth by reviewing and performance managing the Plymouth Local Economic Strategy.

In addition, the Growth Board is the local delivery vehicle for the Heart of the South West Local Enterprise Partnership (LEP). The LEP helps decide what the priorities should be for economic investment, which are outlined in the EU Structural and Investment Fund (EUSIF) and the Strategic Economic Plan (SEP).

There are a number of sub-groups, such as Economic Intelligence, which report directly to the Growth Board.

While the flagships identified by this review will serve as the 'umbrella' for economic development in Plymouth, it is recognised that, increasingly, the resources available for delivery are being delegated to Local Enterprise Partnerships (LEPs). For the city to achieve its ambitions it will need to work collaboratively with the HotSW LEP and other strategic bodies. The LES Review has been developed alongside the LEP's Strategic Economic Plan (SEP) and the EU structural and investment fund investment strategy (EU SIF), with many of our priorities embedded within these documents.

In addition, activities included within the Plymouth and Peninsula City Deal feature strongly across our flagships. A bespoke governance structure has been developed with three core elements: a Peninsula Leadership Group, City Deal Executive and Programme Delivery Board.

## Performance management

To ensure effective delivery of our flagships, project teams and strategic leads will be assigned to each – these will be detailed in the accompanying Implementation Plan for our LES Review.

It is important to recognise that the actions prioritised by this review are not static, nor do they reflect all activities undertaken by partners in delivering economic development. Therefore, while the overarching strategic framework will remain stable, the actions themselves will be more fluid, subject to periodic review and tweaked to incorporate new opportunities/interventions as they emerge.

In response to stakeholder feedback and to support effective leadership and delivery, a more granular approach to performance management is proposed:

- Continued delivery of **Plymouth's Economic Review** series which draws on a variety of data and research sources to paint a picture of current economic conditions in the city. The PER series will develop and maintain a **Plymouth Growth Dashboard** based on a basket of economic indicators covering each of our flagships and the 22 'Key Cities' (see Appendix 1);
- The development of a **Monthly Monitor** which will draw together a suite of 'real time' economic intelligence indicators, bridging the gap between Economic Review issues and providing a more up to date and accessible product;
- Through the Implementation Plan, creation of **Action Plans** and accompanying **success measures** for each of the six flagships including standard economic measures where appropriate. These plans will be 'living' documents, monitored and refreshed by project teams and reported to the PGB on a periodic basis. This will ensure all partners are working together towards a coherent set of economic objectives, prioritising resources and delivery where appropriate.

The suite of proposed Economic Intelligence products will be managed by the Economic Intelligence Sub-group of the Plymouth Growth Board.





## Guiding principles

To add real value, our projects need to be 'fleet of foot' to guarantee limited resources achieve the greatest economic returns. We will only intervene in the economy when confident it will not do any harm. When we need to prioritise our investments we need to ask the following:

**Does it fit the strategic priorities outlined in the LES Review?** The strategic fit of any new intervention is an important consideration to ensure resources are aligned and targeted at the greatest areas of opportunity. Is the fit at a city and/or LEP, national level?

**Does it address a market failure?** There are occasions when the free market fails to deliver optimal returns to society, and removing these failures help markets work more efficiently.

**Do the benefits outweigh the costs?** What are the expected economic returns in terms of wealth and job creation and do these exceed the costs of delivering the intervention?

**Is the project deliverable?** We should consider clarity over timescales and milestones and likelihood of project succeeding. What is the level of risk?

**Does it provide Value for Money?** What is the added private sector leverage generated by public sector intervention.

**What are the profile and reputational benefits?**

**Does it achieve a social objective?** Intervention justified on equity grounds to include alleviating market failures affecting skills and labour market, or targeting equity and low carbon objectives.

# PLYMOUTH GROWTH DASHBOARD

Flagships	Economic indicators	Core outcomes
Ocean City Infrastructure	<ul style="list-style-type: none"> <li>Rental values</li> <li>Employment land developed (Ha)</li> <li>Average house prices</li> <li>Rail journey times</li> </ul>	<ul style="list-style-type: none"> <li>GVA per hour</li> <li>Private sector jobs</li> <li>Employment rate</li> <li>Average earnings</li> </ul>
Digital Economy	<ul style="list-style-type: none"> <li>Superfast broadband penetration</li> <li>Employment in digital industries</li> </ul>	
Business Growth and Investment	<ul style="list-style-type: none"> <li>Business start-up rate</li> <li>Business density</li> <li>Knowledge-based jobs</li> </ul>	
Learning and Talent Development	<ul style="list-style-type: none"> <li>NVQ4+ qualifications</li> <li>Residents with no qualifications</li> <li>Youth-unemployment rate</li> <li>No. of apprenticeships</li> </ul>	
People, Communities and Institutions	<ul style="list-style-type: none"> <li>Index of Multiple Deprivation</li> <li>Economic Inactivity rate</li> <li>Workless households</li> </ul>	
Visitor Economy and Culture	<ul style="list-style-type: none"> <li>Plymouth Culture Index</li> <li>Volume and value of visitors</li> <li>Hotel stock and occupancy rates</li> </ul>	
<b>Ranked against 22 key cities</b>		
<ul style="list-style-type: none"> <li>Plymouth</li> <li>Derby</li> <li>Southampton</li> <li>Portsmouth</li> <li>Sunderland</li> <li>Hull</li> <li>Coventry</li> <li>Norwich</li> </ul>	<ul style="list-style-type: none"> <li>York</li> <li>Preston</li> <li>Wakefield</li> <li>Bath and North East Somerset</li> <li>Blackpool</li> <li>Bournemouth</li> <li>Brighton and Hove</li> <li>Wolverhampton</li> </ul>	<ul style="list-style-type: none"> <li>Stoke-on-Trent</li> <li>Southend-on-Sea</li> <li>Peterborough</li> <li>Doncaster</li> <li>Milton Keynes</li> <li>Kirklees</li> </ul>



## KEY ORGANISATIONS CONSULTED AS PART OF THE REVIEW

Careers SW

City College Plymouth

Destination Plymouth

Federation of Small Businesses

Heart of the SW LEP

NHS Plymouth

Plymouth City Council

Plymouth Growth Board

Plymouth Chamber of Commerce and Industry

Plymouth Climate Change Commission

Plymouth University

Plymouth Business School

Plymouth Culture Board

Plymouth Learning Trust

Plymouth Community Homes

Plymouth Manufacturers Group

Plymouth Community Healthcare

Plymouth College of Art and Design

Plymouth Social Enterprise Network

Plymouth Area Business Council

Social Enterprise – University Enterprise Network

Tamar Science Park

University of St Mark and St John

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