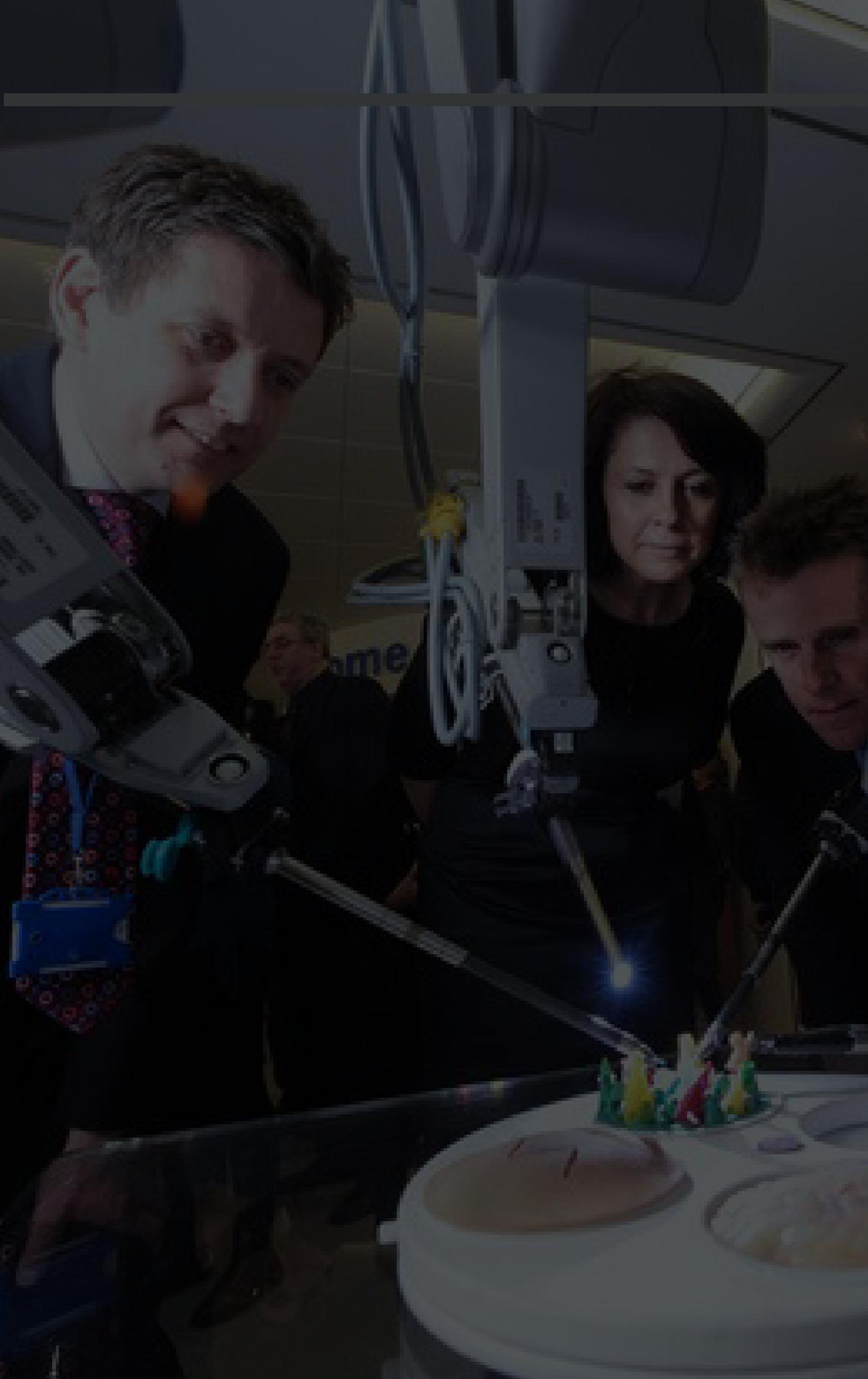




UK Industrial Strategy
Greater Exeter: the engine for regional growth

EXETER
LIVE BETTER

Contents



Contents

UK Industrial Strategy
Greater Exeter: the engine for regional growth

Executive Summary

Page 04

Introduction

Page 06

Section 1

Page 09

1.1 Why Exeter

Page 10

1.2 Growth Challenges

Page 12

Section 2

Page 15

2.1 Theme 1: Finance & Infrastructure

Page 18

2.2 Theme 2: Innovation

Page 23

2.3 Theme 3: Data & Skills

Page 26

2.4 Theme 4: Enabling Environment

Page 32

Concluding Remarks

Page 34

Executive Summary

"We have the capability to significantly scale up and deliver Government's priorities"

"We are creating a place that offers clean, sustainable and inclusive growth"

"We will deliver world class technology and innovative facilities"

Our cities and the unprecedented growth of urban environments present both the greatest challenge and opportunity of our lifetime. As drivers of economic growth across wide regions, cities are essential to modern life, but unsustainable trends in energy use, congestion and associated negative consequences threaten the health of cities and their citizens.

Exeter, while no different in this regard, is already the leading growth centre for the wider Heart of the South West region and we have the capability to significantly scale up and deliver Government's priorities in terms of productivity and growth. In this way, an investment in Exeter is an investment in the success of the wider region as we continue to work closely with our neighbours in Greater Exeter, Devon, Plymouth and Torbay. Equally, Exeter is a great test bed. It is uniquely placed to foster fresh approaches and to promote and share learning. The city already enjoys many of the positives associated with aspirational city living, with healthy commerce and educational centres primed for innovation and investment.

We are taking a whole 'place-making' approach to our Industrial Strategy, committing to creating a place that offers clean, sustainable and inclusive growth. Our approach supports improved quality of life for all and deals with global investment imperatives and local economic need in a financially sustainable way. We seek to make Exeter, and ultimately the wider region, an even better place in which to live and grow old, to work and study, and will leave a long-lasting national legacy of which we can all be proud.

The city's leaders also recognise the opportunity to demonstrate a replicable approach in delivering the Industrial Strategy and are already working with the Heart of the South West LEP to manage conversion from a city pilot to a regional programme. Our bold approach to creating transformational change builds on our strengths to the benefit of the wider region. We require initial commitment and support from government of £502m; to kick-start our new collaborative approach that delivers:

- A sustainable finance solution:** Our bold approach to creating transformational change is underpinned by a capital asset strategy and innovative methods for financing and equity investment that will scale up growth and investment where other initiatives have failed. Our programme is being undertaken jointly across the city's public sector institutions to leverage the city's existing asset base and, via a jointly controlled Fund vehicle, obtain commercial borrowing to create a subsidy-free and commercial city-wide financing and development capability that delivers place-making housing, infrastructure and communities within Exeter City.

More broadly, the regional financing programme and seeks to both capitalise on the city's increasing prosperity through the City Fund and, equally, to self-manage the development of the wider Greater Exeter Region and in East Devon by initial accelerated strategic land acquisition and then delivery of housing, communities and city-linked infrastructure to complement the growth of the area.

This solution will directly deliver or indirectly enable up to 25,000 houses (with many available to rent or affordable to buy), up to 207 hectares of commercial development – housing up to 730,000m² in employment space, and helping to support the creation of approximately 22,000 jobs over the longer-term. Alongside this, there will be a wide range of improvements to the city's infrastructure, including bespoke transport and energy solutions fit for the coming century.

- World-class technology and innovation facilities** building on the City of Exeter's unique and globally recognised strengths in environmental science and big data analytics. Our new facilities will help translate foundational research into commercially viable solutions, catalysing the development of a multi-billion pound global market for Environmental Intelligence, and attracting regional, national and international businesses to create significant regional impact.

Investment in these facilities could deliver up to 3.25 hectares for high quality, innovation-focused commercial development – housing up to 18,000m² of high quality in employment space, with the potential to support up to 1,200 highly-skilled, high-value innovation focused jobs. Environmental Intelligence Institute has the potential to generate over £100m of GVA to the local economy by project maturity. This highlights that if these projects 'get it right', and can draw out mutual relationships, the potential return on public investment is highly significant

- New innovative approaches to teaching and learning** created and delivered via partnerships between Exeter's education institutions and key employers. The approaches deliver city-wide transformation in mathematics attainment and support young and adult learners to acquire the higher-level skills required for jobs in sectors that are critical to the growth of the Exeter economy.

Overall our proposals for enhancing the level of mathematics skills and attainment within the city could deliver enhancements to productivity of circa £10m over the initial five years, building to circa £50m over the longer-term. The proposed South West Institute of Technology – focusing on technical skills for the digital and advanced manufacturing sectors – has a similar potential to boost productivity by circa £70m. The individuals will benefit through enhanced lifetime earnings.

- Establishment of a formal City programme office** to mobilise and manage the delivery of Exeter's industrial strategy; supported by an Innovation Fund that enables organisations and communities to access, co-design and pilot new products and services that address global challenges on a local scale. This programme office will provide a strong and collaborative enabling environment that will support and monitor the delivery of the activities set out in the Strategy.

The wider Heart of the South West area will only meet its stretching productivity targets if there is an early and significant investment in the continued growth of the greater Exeter economy. Thus, an investment in Exeter is an investment in the success of the wider region.

What is learnt in Exeter could be rolled out across the UK. It can provide a model of how Cities and regions can harness their individual strengths to deliver enhanced productivity and high value employment whilst addressing the challenges of unequal growth.



+207 hectares of commercial development

Housing up to 730,000m² in employment space

Supporting the creation of around 22,000 jobs

Introduction

As Government develops its Industrial Strategy, local authorities have a unique opportunity to contribute and shape the future of the UK in this space through their own local strategic plans. This strategy will be key to ensuring that every part of Britain can prosper and that the government has the right policies to drive productivity and earning power. Embedded within that strategy is the principle idea that cities can hold the key and that they need to transform.

As the growth engine for the Heart of the South West, Exeter has the capability to significantly scale up and deliver Government priorities in terms of productivity and growth. The wider Heart of the South West area will only meet its stretching productivity targets if there is an early and significant investment in the continued growth of the Greater Exeter economy. Thus, an investment in Exeter is an investment in the success of the wider region.

There is a significant amount of evidence that points to rising polarisation and social exclusion in our Cities, poorly managed urban growth leads to a growing divide between those individuals who are able to benefit from the opportunities offered by growth and those individuals who are not. Access to fundamental services such as healthcare and leisure, as well as access to education and employment, are all limiting factors on the capability development of our citizens. A focus on driving attainment in mathematics, digital and technical skills across the Heart of the South West region would not only drive individuals' earnings higher (potentially £50m-£100mn over the longer-term), and improve productivity, but it would act as a working illustration at a national level as to how skills can improve individual wellbeing alongside local economic performance.

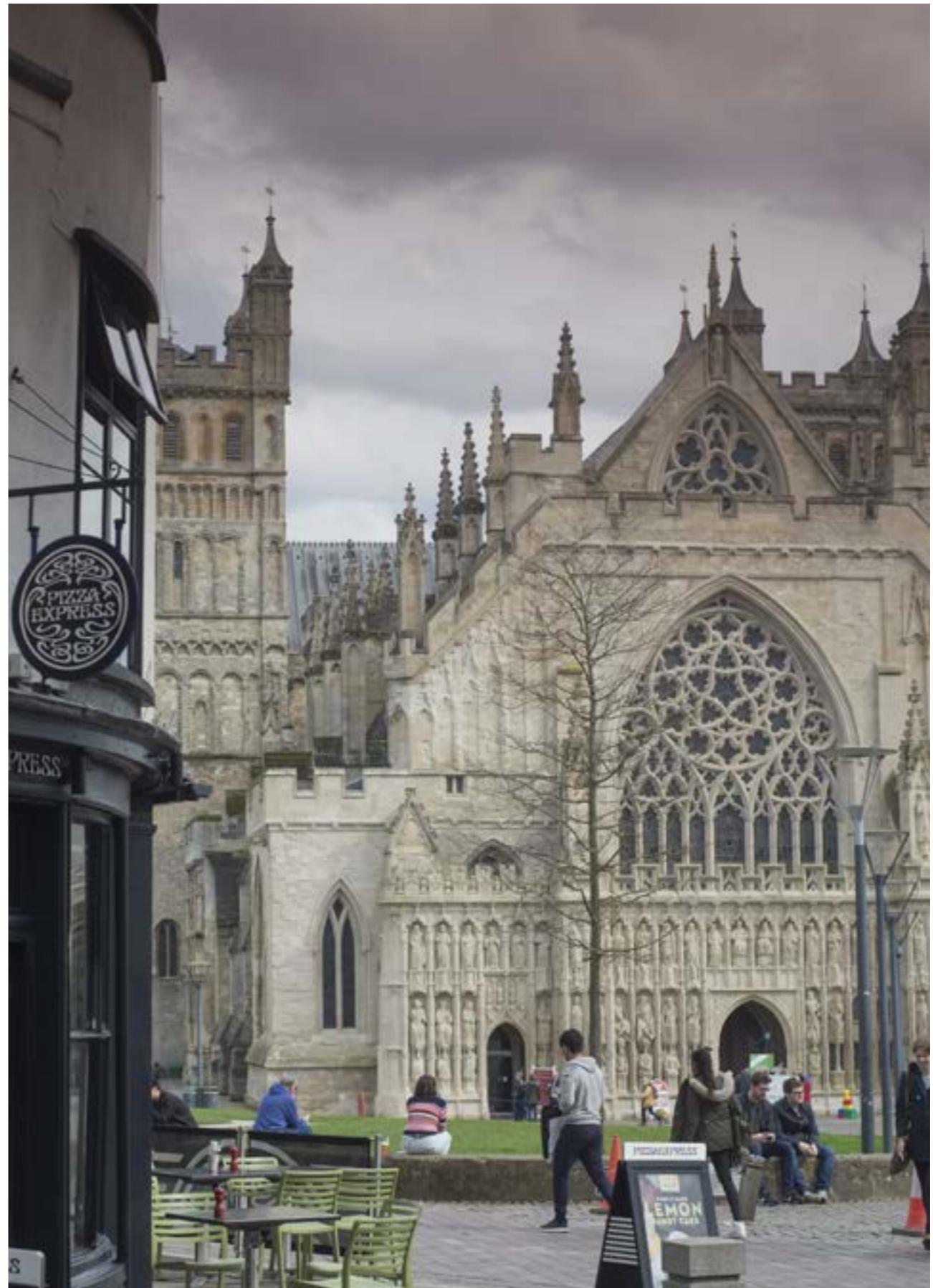
To stimulate and sustain economic development across the region, Exeter needs to be a vibrant place with a distinct identity and a heart that can act as an economic engine. It needs to focus on attracting and retaining the most talented individuals by offering a fantastic quality of life in the very best kind of environment. The continued development of key sites such as the Exeter Science Park will create the high wage jobs that will sustain the area's growing population. Overall, this could exceed 20,000 new jobs in the area over the longer-term.

Our bold and collaborative approach to creating transformational change offers UK Government an opportunity to demonstrate and validate innovative methods for financing and equity investment along with unique approaches to the development of skills that enhance the capability of a city population and can be replicated across the country.

Our place-making goal is essential to create the momentum and investment needed to grow sustainably, inclusively and equitably for citizens and to showcase solutions that can be scaled up to support growth across the Heart of the South West. What is learnt in Exeter could be rolled out across other growing cities across the UK. It can provide a model of how cities and regions can harness their individual strengths to deliver enhanced productivity and high value employment whilst addressing the challenges of unequal growth.

"An investment in Exeter is an investment in the success of the wider region."

"Exeter needs to be a vibrant place with a distinct identity and a heart that can act as an economic engine."





Section 1

“Our economic success to-date has been welcome but maintaining and expanding on that growth in the future, whilst delivering our vision for the City, brings challenges.”

Section 1.1: Why Exeter?

Travel to Work Areas:



2001



2011

Exeter is a successful city.

In January 2017 Exeter was named by the Centre for Cities as the city with the fastest growing population in the UK and one of the largest proportionate workday growth rates in the UK.

Between 2001 and 2011 we have experienced a 29.1% increase in our workday population, with the City exerting a powerful employment pull from Mid Devon, Teignbridge, East and West Devon. Exeter draws in 37,000 commuters, equivalent to c.45% of its total employment, from across the LEP area.

Hosting the largest cluster of digital economy activity south west of Bristol, our population is among the best trained in the UK. Globally recognised R&D assets in the University of Exeter and Met Office ensure that Exeter is a world leader in climate science (Science and Innovation Audit (SIA) Report 2016).

"we are driver for the productivity of the wider region"

Our economic region is prospering, with GVA growth at 5.7%, Exeter's performance is bettered only by Milton Keynes (8.2%), Warrington (7%), Swindon (6.7%), Peterborough (5.9%) and Cardiff (5.8%). Exeter's growth in productivity has moved up the rankings from 23rd place in 2015 to 17th in 2016 – we are driver for the productivity of the wider region (itself one of the lowest performing areas in England).

Furthermore, the jobs created in Exeter are not just 'average' jobs. The 2018 Cities Outlook shows that, of 63 UK Cities, Exeter had the 10th fastest private sector employment growth and the 11th highest share of residents with high level qualifications (Level 4+). With GVA growing 50% faster than output growth across HotSW and productivity per full-time employee 25% higher than the surrounding area¹, Exeter is becoming a hub for the knowledge-intensive employment and productivity-led growth that the UK needs to deliver to succeed post-Brexit.

Exeter has exceptionally strong private sector employment growth (10th of all UK Cities), 19th on the list of Tech cities in the UK, creating as many tech jobs as Cambridge Employment across Heart of the South West rose by 6%, a quarter of the rate seen in Exeter. Between 2007 and 2017, the number of 16 to 64-year olds employed in the Exeter rose by 25% (22,400 FTE). Outside the city, Devon added 4,000 FTE jobs. Benefits that this nascent agglomeration

confers across an otherwise peripheral region is evident from fact that the wages of residents of East and Mid Devon (both £513), boosted by high levels of commuting to well-paid and rewarding employment, now exceed those of Exeter residents (£507).

"Exeter is becoming a hub for the knowledge-intensive employment and productivity-led growth"

Exeter is a collaborative city.

15 years ago, Exeter had the 2nd poorest state schools in the south-west and uneven health outcomes. Through strong collaborative partnerships we've addressed nearly every one of those elements, creating pathways to skills at every level. Our City has a high level of educational attainment and several excellent education institutions that include 2 TEF Gold rated educational establishments (University of Exeter and Exeter College) and through a unique collaborative partnership between the University of Exeter and Exeter College we have developed one of two dedicated Mathematics Schools in the UK (Ofsted rated outstanding at first appraisal).

Exeter is an ambitious city.

Uniquely placed to foster fresh approaches and to promote and share learning, Exeter is a great test bed. Through recent successful work done by the City Council and collaborations with Exeter City Futures and University of Exeter, the city is building data aware communities and engaging citizens and businesses in the generation of sustainable innovative solutions to the challenges we face. The city already enjoys many of the positives associated with aspirational city living, with healthy commerce and educational centres primed for innovation and investment.



¹ Oxford Economics local economic model

Section 1.2: Growth challenges

Our economic success to-date has been welcome but maintaining and expanding on that growth in the future, whilst delivering our vision for the City, brings challenges.

Exeter has a vision to be seen as a leading knowledge economy and entrepreneurial city in the UK, raising productivity attracting significant investment and raising income levels for the benefit of its residents and businesses. Building on our existing strengths, we aim to be the global leader for addressing the challenges of climate change and urbanisation, and the world-leading location for applied environmental science, health and data analytics.

"we aim to be the global leader for addressing the challenges of climate change and urbanisation"

We aspire to be the grant and subsidy-free, economic engine for the Region; providing 20,000 extra jobs within the Greater Exeter area over the next 10 years, supported by development of 2,600 dwellings per annum and approximately £10bn of private money and £2bn of public funds invested in the region.

To deliver that vision for the City we recognise that we must address a range of challenges that exist already in the region and which come with ambitious growth targets:

- Mobility: with one of the largest travel-to-work areas in the country drawing over 37,000 daily commuters



**20,000
extra jobs
over the next 10 years**

there is already pressure on the road and rail network. Peak time traffic speed, at average 4.7 mph, is already among the slowest in country. Any further development of land for housing and employment is likely to result in a road network that cannot absorb additional traffic. Future developments require innovative, data-led mobility solutions tailor made for the city and that align to Department for Transport's mobility mission:

- Safer streets
- Improved access to transport
- Cleaner freight
- Liveable cities
- Inequality: the spread of benefits in typical developments is seeing profits leaving the city and the declining quality of product. As a result, the quality of public spaces is suffering, affecting both the education and business prosperity of the greater city region and the overall health and well-being of its residents
- Exeter is one of only 5 cities where average age of the population has gone down. Cranbrook has the second youngest demographics of any community in the country.

Without investment for change we risk a reduction in physical and mental health, a gridlocked transport system, rising low paid employment and further declining productivity. Many cities throughout the UK and Europe share the issues raised by rapid growth and our challenges are not unique; indeed, they form some of the grand challenges that face the whole of the UK. But we believe that we can build on the existing strengths of Exeter city to unlock the right programme and can be a model for all Cities



**Exeter is 1 of only 5 cities
where the average age of the
population has gone down**



Section 2

We believe the solution to addressing our challenges and managing growth in a way that delivers raised productivity and the vision of a sustainable city, lies in building a strong innovative city with the right skills and enabling environment that can offer a benchmark for the UK's industrial strategy and plans for clean, inclusive, sustainable cities. To do that we need to build on our assets and our unique strengths.



Section 2: Our Solution

We believe the solution to addressing our challenges and managing growth in a way that delivers raised productivity and the vision of a sustainable city, lies in building a strong innovative city with the right skills and enabling environment that can offer a benchmark for the UK's industrial strategy and plans for clean, inclusive, sustainable cities. To do that we need to build on our assets and our unique strengths

Exeter seeks to undertake a comprehensive City change programme that addresses four key interdependent areas, figure 2, that together will deliver sustainable and lasting transformation.



Sustainable Finance & Infrastructure Harness capital flows within the City to enable investment in infrastructure development in a way that delivers the City vision	City Innovation Create the right institutions, process and support structures to nurture the right solutions to our challenges	Data & Analytical Skills Develop the skills and capabilities to harness and interpret data to ensure value generation globally and locally - become the world's leading analytical City
Enabling Environment		
Build governance structures, policies and processes that foster collaborative experimentation and shared vision		

Figure 2: Exeter's approach to addressing the challenges of growth and delivering the Industrial Strategy

Working together these interdependent and joined-up approaches have the potential to deliver significant economic benefits not just now but in the coming decades. Fundamentally, they will address many of the barriers that have been building in the city and unlock the growth potential within Exeter and the wider region. As shown over the past decade, the appetite and ability of Exeter's businesses and population to innovative growth in existing and new markets is considerable.

"the appetite and ability of Exeter's businesses and population to innovative growth in existing and new markets is considerable."

The work done to date on the proposed interventions that form part of the Exeter Industrial Strategy proposal indicate that the benefits will be multi-faceted and have the ability to not only sustain the city's recent performance but to put it on a different growth trajectory – helping to pull along the wider region.

Alongside the 25,000 new houses that will be enabled, up to 207 hectares of land could be unlocked for commercial development. The continued development of key sites such as the Exeter Science Park will create the high wage jobs that will sustain the area's growing population. Overall, this could exceed 20,000 new jobs in the area over the longer-term.

This will be enhanced by a sharp focus on providing the skills needed to deliver the aspirations detailed in the Industrial Strategy. A focus on driving attainment in mathematics, digital and technical skills would not only drive individuals' earnings higher (potentially £50m-£100mn over the longer-term), and improve productivity, but it would act as a working illustration at a national level as to how skills can improve individual wellbeing alongside local economic performance. Our proposals for delivery and research in this area will provide invaluable robust evidence showing the developing link. Exeter's potential role as a live testbed for future regional policy should not be underestimated.

Building new capability within these themes is critical to delivering sustainable City growth aligned with the government's industrial strategy; outwardly focused on addressing major global trends, but firmly founded on a clear future vision for our place.

Adoption of Exeter's model would ensure Exeter is a vibrant city that delivers on governments Industrial Strategy and placemaking aspirations. We believe that the route to get there is through the undertaking of a complete a

wide-ranging transformational change programme that is delivered collaboratively across our City.

The City already has an engaged community of residents and businesses who are aggregating skills and expertise to contribute towards our goals. Through recent successful work done by the City Council and collaborations with Exeter City Futures and University of Exeter, the city is building data aware communities, driving planning and procurement policy reform and engaging citizens and businesses in the generation of sustainable innovative solutions to the challenges we face.

There are many ways in which the government can help accelerate our activities. Investing in these solutions in Exeter can provide a model for how cities and regions across the UK can harness their individual strengths to deliver enhanced productivity and high value employment. Through the following sections we outline each transformational theme area along with the benefits that these can offer to Exeter and the UK government.





Section 2.1

Theme 1: Finance & Infrastructure

The finance and infrastructure element of Exeter's approach is comprised of two proposals: Sustainable Finance; and Land acquisition and infrastructure investment.

"Sustainable Finance" concerns a programme to leverage the city's existing asset base across its public sector institutions and, via a City Fund vehicle, obtain commercial borrowing to create a subsidy-free and commercial city-wide financing and development capability that delivers place-making housing, infrastructure and communities within Exeter City.

"Land acquisition and infrastructure investment" has a broader geographical programme and seeks

to both capitalise on the city's increasing prosperity through the City Fund and, equally, to self-manage the development of the wider Greater Exeter Region and in East Devon by initial accelerated strategic land acquisition and then delivery of housing, communities and city-linked infrastructure to complement the growth of the area.

Each of these proposals aim to unlock and enable housing development to meet Exeter's growing needs, to develop the commercial space which is required to allow the economy to continue to grow – particularly in key locations – and to underpin this with infrastructure which will be sustainable and address many of the barriers to growth currently faced. Given the proposals are inter-linked in many respects, the economic benefits that they could deliver are also intertwined. However, the scale of impact would be highly significant in the context of the growth aspirations of the city.

Overall, the proposals could directly deliver or indirectly enable up to 25,000 houses (with many available to rent or affordable to buy), up to 207 hectares of commercial development – housing up to 730,000m² in employment space, and helping to support the creation of approximately 22,000 jobs over the longer-term. Alongside this, there will be a wide range of improvements and enhancements to the city's infrastructure, including bespoke transport and energy solutions fit for the coming century.

"We aim to unlock and enable housing development to meet Exeter's growing needs"

Proposal 1: Sustainable Finance

Project brief

Piloting of a City-controlled, grant and subsidy-free, commercial development fund, capitalised by property assets owned by the city's spread of public sector organisations, that then independently acquires commercial finance to invest in and deliver the infrastructure in Exeter City, with a long-term outlook in city placemaking.

Funding Request

£10m working capital across three gateways:

- Gateway 1: £500k - Development of an Investment prospectus and detailed financial modelling demonstrating the investment timeline and project landscape, governance framework, the shape and mechanisms of capital recycling and forecast profitability of the fund structure. Delivered by external consultant team, with whom the City Fund will partner on an ongoing basis for both continuity, monitoring and quality. Where viability of the fund is demonstrated successfully:
- Gateway 2: £2.5m - Incorporation of the City Fund and recruitment of CEO and senior team. Establishment of fund management capability, legal advice framework and recruitment and engagement of PMO advisor. Target operating model development; and
- Gateway 3: £7m - Pilot projects: Project feasibility studies, detailed financial modelling, business cases and procurement innovation procedures for year 1/year 2 capital project profile. PMO set up and implementation. Investor engagement and consultant advisory.

Funding Rationale

Aim: To harness capital flows within the City to enable investment in infrastructure development in a way that delivers the Place-making aspirations of the UK's Industrial Strategy in Exeter without long term dependence on Government funding.

Offer: Incorporation of a new entity (e.g. Exeter City Fund LLP), owned and controlled by the city's public sector institutions (to begin with - City Council, University of Exeter and the Royal Devon and Exeter NHS Foundation Trust (the "Trust")), whose purpose is to finance and manage the program of investments that funds city projects, innovation and bridges the housing and infrastructure gap within the city.

The fund will provide a single source of finance and project management to procure and deliver the housing and infrastructure required for the city's vision and the regional exemplar of UK place-making aspirations in the industrial strategy.

The fund is profitable in the round and uses the profits from the healthier, vanilla property development schemes to finance and deliver energy and transport innovation, projects with less traditional profit profiles and projects of higher social benefit.

The fund will lead the way in developing out the city, so as to then ultimately link with the Greater Exeter region development vision via the Greater Exeter Strategic Plan (GESP), providing greater city prosperity within the wider region and additional commercial investment that augments Government's infrastructure funding pipeline for the area.

The fund also employs an end-to-end, fresh approach to procurement, with data driven, challenge-based processes that procure regulatory-compliant solutions and drive industry innovation side by side.

Economic outputs

Initial discussions with the Fund's partners and exploratory work have identified 29 potential sites across the city, under mixed public sector ownership, for inclusion in an initial modelling exercise. These sites represent potential locations for redevelopment. These have a combined value of c.£50m with which to capitalise the Fund. Using the £50m asset base and site list as a starting point for development, a 12-year housing and commercial site development profile requires:

Equity asset base value	£50m	Public sector asset base
Capital infrastructure spend	£600m	Commercial borrowing
Developed out asset base value	£678m	For holding in operational fund

When developed out, this set will produce:

- Up to 5,000 new rented dwellings within the city
- 300,000ft² of rented commercial space
- Enhanced mobility and bespoke transport infrastructure (as-yet unmodeled)
- Accompanying energy network innovation (as-yet unmodeled)
- Pre-tax surplus on development spend of £78m and NPV of £25m over 12 years
- Collaboration with the Greater Exeter Region (See Section/Business case 2: "Land Acquisition and Strategic Infrastructure Investment") and the future of grant and subsidy-free infrastructure. The City Fund aims to gather momentum and profitability, and then augment the regional funding by providing commercial, local capital, generated by the city's own developments, to link into the wider region's developments and support them in perpetuity, subsidy-free.
- Leading the generation of growth and prosperity: by tackling transport through innovation and densifying its own housing provision to drive 'place-making' with which communities can grow in a live-and-work context, the regional vision is bolstered by the Fund developing a growing, vibrant city to provide jobs and a growth economy.
- The heart of the Fund's success is its collaboration across the key public sector and private sector organisations in the city. With these city leaders all working together to finance Exeter's infrastructure, it gives the region's wider plans and bids to government greater leadership by example (and vice versa).

**5,000
new rented
dwellings**

**300,000ft²
of rented commercial
space**

Proposal 2: Land Aquisition and Strategic Infrastructure Investment

Project brief

Acceleration of the delivery of key strategic developments in the Greater Exeter area so as to ensure advanced site assembly and comprehensive development and regeneration proposals are brought forward with improved pace and quality.

The scheme seeks to ensure an infrastructure-led approach and the timely delivery of critical infrastructure improvements and to realise wider place making objectives and a coordinated and integrated programme of development across the city region.

The scheme will also enable a transition to a sustainable funding model which realises wider social and environmental benefits and augments the approach of the City Development Fund (Proposal 1). This provides a cohesive Greater Exeter development strategy that maximises the contribution to productivity growth in the region and as a model for the UK.

Funding request

The total funding request is £350m.

The request represents the net funding requirement over the next 5 years for land acquisition and infrastructure costs and takes into account receipts from land disposal and other funding contributions from existing known sources e.g. s106, CIL, HIF or other public funding.

Rationale for the project

This approach aligns with and augments the City Development Fund proposals as part of a wider sustainable finance approach (See Proposal 1: "Sustainable Finance"). It will provide further investable propositions and help to unlock the wealth of the city region both in terms of the delivery of new homes and jobs. This integrated approach is intended to achieve wider place-making objectives as well delivering recyclable and profit-making capital, for example through an enhanced ability to capture land value uplift.

Currently around 2,500 new homes are delivered per year in the Greater Exeter area which is in line with Local Plan targets. The housing market remains buoyant, underpinned by a strong economic performance. But housing affordability remains a very significant challenge with ratios of average house prices to earning exceeding 10:1.

The Local Authorities have a track record of working proactively with our partners to unlock and bring forward major development sites. Moving forward we know that we will face new challenges. This includes achieving a step change in the density and intensity of development within the City including the potential for car free developments (ref: Proposal 1: "Sustainable Finance").

There is a need to lead the market rather than just react to individual proposals. Equally we need to learn from our experience of bringing forward major greenfield sites in the wider travel to work area. We recognise the critical 'master developer' role that is required to drive the quality and pace of delivery and ensure that we create the type of places of which we can all be proud.

"There is a need to lead the market rather than just react to individual proposals."

The local partners are bringing forward a new strategic plan for the Greater Exeter area. Control of land is seen as an essential ingredient in the ability to significantly reduce the lead in time for new development to come forward. Equally the ability to act as the master developer will ensure that quality objectives are met.

The emerging Greater Exeter Strategic Plan (GESP) promotes growth in several key strategic areas across the city region and to support this the partners have considered the sites where direct intervention by the public sector is likely to be most effective. A portfolio of potential acquisitions has been developed and discussed in the first instance with Homes England. In line with the strategy for growth and productivity they represent a range of large scale opportunities for new settlements and urban extensions through to brownfield urban regeneration.

Together these sites will deliver around 10,000 new homes on around 380ha of land to support our growing economy. High up-front infrastructure costs are a recognised barrier to delivery. We have successfully unlocked major developments through the application of revolving investments where critical infrastructure improvements are brought forward at an early stage with funds being recouped as development proceeds.

We wish to further build from this platform to create a revolving infrastructure fund as part of a sustainable financing model which also captures the growth dividend

in terms of enhanced revenues such as non-domestic rates. This will enable comprehensive control over regional investment strategy, finance and delivery and achieve greater social impact.

Economic outputs

The proposal is likely to generate the following outputs:

- Number of new homes – 9,500 existing density to 11,000 at higher density on sites to be acquired out of total of 25,000 homes enabled by infrastructure. This will deliver 9,500 direct housing outputs and a further 15,500 indirect outputs enabled;
- Average 30% affordable – 2,900 at existing density;
- Employment land – 26 Ha on strategic sites out of a total of 207 Ha potential for GESP;
- Amount of commercial floorspace – 90,600m² on sites to be acquired out of 733,000m² potential for GESP;
- Number of jobs accommodated – 2700 on sites to be acquired out of a total of 22,200 including jobs enabled by infrastructure;
- Private sector investment Housing - £2.8bn on the strategic sites and a total of £7.3bn for the whole GESP area;
- Private Sector Investment Employment floorspace - £136m on strategic sites out of £1.1bn for the GESP area;
- Public sector investment - £95m identified from s106, existing CIL and other partners.

**2,700
on site jobs
to be aquired**



Section 2.2

Theme 2: Innovation

Innovation is at the heart of a strong economy, from transport and energy to sustainable construction and healthcare, it keeps Cities attractive to investors, it provides export opportunities, creates jobs and maintains a higher standard of living.

Innovation must be underpinned by strong, globally recognised institutions and facilities that can attract and nurture entrepreneurial and academic talent in our region and in turn deliver high-value employment and economic growth. The innovation element of Exeter's approach is comprised of two proposals: expansion of the R&D and innovation capacity at the Exeter Science Park and the development of a world leading Environmental Intelligence Accelerator.

Each of these proposals aims to maintain the momentum generated in Exeter's innovation base. The proposals aim to significantly enhance capacity in the city and develop a new institution which harnesses the city's expertise in environmental analytics and digital technology. It is proposed that the Accelerator be located at the Science Park as part of the development of the Global Environmental Futures Campus, alongside the Met Office Supercomputer and Collaboration Hall. Taken together, the scale of impact would be highly significant in the context of the city's fast-growing innovation and science base, allow Exeter to build on its key research assets (of global renown), and see the UK take the leadership in the development of the market for environmental intelligence.

Overall, the below proposals could deliver up to 3.25 hectares for high quality and innovation-focused commercial development – housing up to 18,000m² of high quality in employment space, with the potential to support up to 1,200 highly-skilled and high-value innovation focused jobs. A potential key element of these plans is the establishment of an Environmental Intelligence Accelerator, which will build-on the initial development of a Global Environmental Futures campus on the Science Park. This project alone has the potential to generate over £100mn of GVA to the local economy by project maturity. This highlights that if these projects 'get it right', and are able to draw out mutual relationships, the potential return on public investment is highly significant.



Proposal 3: Exeter Science Park

Project brief

Exeter Science Park Ltd (ESPL)² is owned by its public sector shareholders' (Devon County Council - DCC, East Devon District Council - EDDC, Exeter City Council – ECC, and the University of Exeter - UoE), who had a vision to develop a science park to stimulate a knowledge-based economy delivering high-value jobs, improved productivity and economic growth.

"a vision to develop a science park to stimulate a knowledge-based economy delivering high-value jobs, improved productivity and economic growth"

ESPL's mission is to help innovative STEMM (Science, Technology, Engineering, Mathematics, Medicine) companies to deliver extraordinary growth (a Gateway Policy is used to maintain this focus). The aim of this project is to accelerate the development of Exeter Science Park (ESP) in order to create a sustainable, critical mass of innovative and entrepreneurial STEMM businesses by 2027. The high-level objectives are:

- Create and communicate a strong, highly-differentiated value proposition to attract regional, national and international STEMM-based businesses.
- Advance the release of development land with outline planning permission for a deliverable EPIC design.
- Accelerate the development of 195,000 sqft (18,120 m²) of cost-effective, efficient and flexible space.
- Extend the Science Park Centre to become a vibrant hub for on-site client-staff and off-site guests.
- Deliver two world-class technology facilities as well as flexible laboratory and office space.
- Create a sustainable, critical mass (2000 client staff) of sustainable, innovative STEMM businesses by 2027.
- Transition to a sustainable funding model which realises broad, regional innovation benefits.

Funding Request

The total funding request is £65m.

The request represents the forecast build cost of the EPIC project adjusted for projected construction inflation. The funding requirement includes costs for:

- Land acquisition and master planning £1.5m
- Construction costs £50.8m
- Construction professional fees £10.7m
- Landscaping, removal costs, attenuation ponds £0.8m

Rationale for the project

This project directly supports the achievements of national and local economic growth, productivity and diversification objectives, including a recognised need to invest to support high-value jobs, productivity gain, innovation and growth.

There is an identified market need for the provision of accommodation to support development of a sustainable and critical mass of innovative and entrepreneurial STEMM and data businesses. By addressing this market failure, the project contributes to the continued and sustained growth of Exeter, Greater Exeter, Devon and the wider region whilst recognising the potential barriers to accommodating higher growth rates with the core of the city.

Economic outputs

The proposal is likely to generate the following outputs:

- The unlocking/release of 3.25 ha of development land in the first year
- 18,122 ft² of commercial rental space
- 1,216 skilled jobs over 10 years

**1,216
skilled jobs
over 10 years**

² Exeter Science Park Ltd (ESPL) is run on a 'not for distribution' basis meaning that it is effectively a 'not for profit'.

Proposal 4: Environmental Intelligence Institute

Project brief

Development of an Environmental Intelligence Accelerator at the Exeter Science Park Global Environmental Futures Campus, which builds on the City of Exeter's unique and globally recognised strengths in environmental science and big data analytics. The Accelerator will provide the resources and infrastructure to bridge the 'valley of death' in the translation of foundation research to commercially viable Environmental Intelligence Solutions. This will catalyse development of a multi-billion pound global market for Environmental Intelligence and deliver substantial regional benefits.

"This will catalyse development of a multi-billion pound global market for Environmental Intelligence and deliver substantial regional benefits."

Funding request

Funding is requested to support the full direct costs of the project - £30m for a situation in which accommodation is rented, or £40m in which purpose-built accommodation is developed.

Rationale for the project

The Environmental Intelligence Accelerator seeks to address the following key challenges and drivers:

1. The City of Exeter's strengths in Environmental and Data Sciences are globally renowned, but their potential to drive regional economic growth is currently under-exploited due to a lack of capacity for translational research and development.
2. A changing climate, dwindling natural resources, and requirement to transition to a low-carbon economy, means that there is growing need for individuals, businesses and governments to use environmentally-related information in their operations.
3. Opportunities afforded by *The Fourth Industrial Revolution* to address environmental challenges for social and economic good, are currently underutilised.

These key challenges mean there is opportunity for the City of Exeter to draw upon its strengths and global reputation to lead the development of a world-wide market for



'Environmental Intelligence Solutions'. This opportunity is aligned with a range of regional, national and international policies including Industrial Strategy Strength in Places and Clean Growth; Climate Policy commitments such as the 2 degrees target; and the 2 Year Environment Plan.

In particular, it builds on the City of Exeter's aspirations to drive growth through building on existing strength to become an Analytical City.

Economic outputs

Assuming that the accommodation is rented, for an investment of £30m over 5 years, economic benefits can be summarised as follows:

- Net Additional GVA of £75.3m by Year 5, rising to £144.2m by Year 10 under sustainable operation
- 5 Year cumulative Net Additional GVA of £225.2m rising to £817.4m in Year 10
- 5 Year Net Present Value of £180m - representing a Benefit Cost Ratio of 6.
- Net Additional GVA of 10 Year cumulative 10 Year Net Present Value of £595m

In the scenario where the accommodation is purpose built, investment increases to £40m over 5 years, with the following expected economic benefits:

- Net Additional GVA of £75.3m by Year 5, rising to £144.2m by Year 10
- 5 Year cumulative Net Additional GVA of £241.3m rising to £824.7m in Year 10
- 5 Year Net Present Value of £177.5m - representing a Benefit Cost Ratio of 4
- 10 Year Net Present Value of £593m
- Potential to increase GVA and NPV through use of additional c. 15,000 sqft available space - at least additional £500k per annum income.



Section 2.3

Theme 3: Data & Skills

Analytical skills are at the heart of any successful city development programme of the future. The skills element of Exeter's approach is comprised of 4 proposals: "Exeter Digital and Data Education Hub (EDDE-Hub)", "Sparx Roll-out", "Skills Escalators" and leadership of the "South West Institute of Technology".

These proposals address how we will use data more effectively to enhance the city's planning, education, businesses and communities and to develop the skills that will be needed for the future employment opportunities within our City.

Together, "EDDE-Hub" and "Sparx roll-out" will achieve city wide transformation of data, digital and mathematics skills. Through research informed, data enabled innovation they will create behaviour change that leads to systemic improvement. Via the establishment of the EDDE-Hub and the associated educational technology rollout we will: i) create widespread capacity for data, digital

and mathematics teaching; ii) embed educational technology across the city – generating a comprehensive education data set; iii) create interconnections between employers, schools and learners of all ages to improve employability and productivity.

Working in combination these proposals will enhance the skills base within the city, delivering significant benefits in the medium-to-longer term through higher value and paid jobs, a better supply of skilled employees for Exeter businesses to expand, and eventually improvements to productivity levels.

Overall the proposals for enhancing the level of mathematics skills and attainment within the city could deliver enhancements to productivity of circa £10mn over the initial five years, building to circa £50mn over the longer-term.

The proposed South West Institute of Technology – this time focusing on technical skills for the digital and advanced manufacturing sectors – has a similar potential to boost productivity by circa £70mn. The individuals will benefit through enhanced lifetime earnings.

A key focus for local partners will be to retain a significant proportion of these benefits within the Exeter economy.

This highlights the important links to the other proposals – a key element of retaining highly-skilled people will be the continued development of high-value jobs enabled through the coordinated approach to strategic investment within the city.

The development of a city-wide mathematics programme for all school children in the city has the potential to deliver benefits over the longer-term at a scale much greater than those indicated above. The enhanced earnings potential in this scenario would have a transformational element, although uncertain at this time.

"we will use data more effectively to enhance the city's planning, education, businesses and communities"

Proposal 5: EDDE-Hub

Project brief

The Exeter Digital and Data Education Hub will bring Exeter's schools together with employers, educational technology innovators, one of the UK's top 5 schools of education and an 'Outstanding' (Ofsted) FE College, to:

- Raise awareness, understanding and aspiration to progress into sectors that are critical to the growth of the Exeter economy
- Co-create innovative approaches to teaching and learning and new curricula in key sectors address recruitment difficulties that are impacting on both employer competitiveness and teaching capacity
- Provide a research underpinning and holistic framework that maximises the successful adoption of education technology by multiple learning groups (cross reference Section 8)

Funding request

The total funding request is £5.05m over a period of five years.

The request represents the cost of establishing the resource to deliver the EDDE-Hub and finance to support engagement with academics and teachers.

Rationale for the project

Exeter is developing as a national and international hub for data analytics. However, growth is potentially constrained by a lack of skills. Exeter continues to host many neighbourhoods with high levels of deprivation. Aspiration and rates of progression to higher level learning are low. We need to raise understanding of the job opportunities being created by growth in Exeter and to create a pathway that enables young people to benefit from the employment opportunities being generated in and around the city.

Learning identities, e.g. that 'maths is boring', are forged at an early age. New technologies and flexibilities are creating opportunities to better engage young people through

more engaging and meaningful approaches to teaching and learning, forged by bringing academics, teachers and employers together to co-create new curricula.

We need to address recruitment difficulties and difficulties that teachers have keeping up to date with the rapid pace of change in technologies and working-practice in sectors that are critical to successful delivery of the city vision.

Economic outputs

Deriving an estimated economic return on investment in the EDDE-Hub, involves estimating the extent to which it is likely to encourage the 2,500 students that we propose to reach over five years to take up higher levels of study in relevant subjects such as computer science, mathematics and data science. Taking a prudent assessment of students progressing to higher education, the proposal is likely to generate the following outputs:

- Increase in lifetime earnings of individuals directly supported by EDDE-Hub by £30m.
- Increase individuals' earnings over just the first five years of operation can be estimated to be around £5.7m
- Productivity impact of EDDE-Hub approximately £9 million over its first five years
- Lifetime productivity impact of the EDDE-Hub's first five years of operation is estimated to be around £47m (although labour mobility means that not all of this will be experienced within Exeter.)



£30m increase in lifetime earnings of individuals



£9million productivity impact over the 1st 5 years

Proposal 6: Sparx

Project brief

This project seeks to achieve city-wide transformation of mathematics skills through the development and roll-out of education technology. This programme will lead to improved educational outcomes and related wider social and economic benefits.

This ambitious programme will be underpinned by outstanding research driven through the Exeter Digital & Data Education Hub (EDDE-Hub) and will be supported through the City's associated data skills escalator. The programme had been co-developed by Sparx, the University of Exeter and schools.

Funding request

The total funding request is £16.1m (across 5 years). This funding represents:

- £14.1M to cover costs of supplying Sparx products to all schools, prison, FE college and all eligible individuals in Exeter free of charge
- £2M to fund the Sparx ECR team (Exeter City Research) working alongside / with the EDDE-Hub to generate city wide research and analytics on the improvement to educational outcomes through the use of Sparx technology and the wider social and economic impacts of those improved educational outcomes

Rationale for the project

There are 3 primary drivers for this programme:

1. Mathematics attainment levels in Exeter and across the UK are not at the desired level
2. Existing research shows that poor mathematics attainment leads to poor productivity
3. The Industrial Strategy calls for an increase in the number of people skilled in mathematics

With this in mind there are 4 core objectives of the programme

1. To improve the education provision and learning outcomes in mathematics for all eligible learners in Exeter
2. To provide a consistent platform for mathematics learning across all schools and individual learners
3. To capture an accessible city wide data set on mathematics attainment and progress that can be linked to other datasets (e.g health - Exeter 10,000)

4. Via the EDDE-Hub undertake research on city-wide educational outcomes in mathematics and to understand the wider social and economic impacts of these outcomes.

This aligns closely to the core mission of Sparx which is 'To improve educational outcomes through research-based technologies that empower educators and motivate students' as well as the key drivers of city leaders of smart, sustainable and inclusive growth.

"To improve educational outcomes through research-based technologies that empower educators and motivate students"

Economic outputs

A regional-scale mathematics programme such as proposed here, has considerable potential to generate improvements across a wide range of economic indicators, ranging from educational attainment to increased wages and even improved health.

In the high outcome scenario, this project could result in individuals obtaining up to 0.42 additional years of schooling and increase the probability of obtaining at least a higher education degree by up to 15%. The programme could further increase hourly wages up to 14%, increase the probability of employment by up to 3% and decrease the probability of being NEET (Not in Education, Employment or Training) upon finishing school by up to 17%.

+ 0.42 additional years of schooling

↑ 15% increase in obtaining a higher education degree



Proposal 7: Skills Escalators

Project brief

This project brings education and training providers together to contribute to the National and local LEP priority of increasing productivity. The key objective is to raise awareness, understanding and aspiration to pursue employment opportunities in sectors and businesses that are critical to the growth of the Exeter economy.

"bringing education and training providers together to contribute to the National and local LEP priority of increasing productivity"

By integrating the skills provision, we will enable young people to move seamlessly between providers progressively acquiring the higher-level skills required for jobs in these sectors. Building on the development of the Data Analytics Skills Escalator, this project seeks to create pathways to skills and employment:

- To offer curriculum in specific areas to allow adults to upskill or retrain in a priority area
- To better engage employers in the development of careers information advice and guidance, curriculum content, teaching and learning methods, provision of placements
- To better educate parents so that they are aware of local job opportunities in priority industries and to promote the benefits of the Outstanding local education offer
- To give clarity on curriculum options and qualification types for young people, adults, parents and employers

Funding request

The total funding request is £3.5m.

The request represents the costs of establishing specialist careers guidance, development of apprenticeship schemes and enhancing the teaching and learning provision by recruiting specialist teachers.

Rationale for the project

Exeter is one of the fastest growing cities and home to leading national employers, such as Flybe. This growth is potentially constrained by a lack of skills.

Young people locally and nationally are poorly informed about the careers and job opportunities that are available to them. Where they do have careers in mind, the learning and skills pathways required to gain these jobs are often poorly understood or poorly developed.

To provide opportunities for adults, including those in low skilled employment, to upskill or change career to a local priority industry. There is a high proportion of adults qualified up to level 3 in Devon, however there is still a large number in low paid jobs.

Education and training providers in the region are coming together with strategic partners to develop coherent approach to the skills needs of pivotal industries, through the creation of skills escalators.

Economic outputs

This proposal is in an early stage of development. Stakeholder meetings are in progress and the specifics requirements of the programme are yet to be finalised. It is expected that this project will deliver benefits in terms of lifetime earnings and productivity. However, at this stage, it is difficult to state, with any robust assumptions, what the outcomes will be. Furthermore, these are likely to be strongly linked into outcomes delivered by the other business cases in this theme and therefore hard to extract.

Proposal 8: South West Institute of Technology

Project brief

Led by the University of Exeter, the South West Institute of Technology (SWIoT) will deliver industry standard, higher level technical education from levels 4 to level 7 for the digital and advanced manufacturing (4.0) sectors across Cornwall, Devon and Somerset. SWIoT will, among other investments, combine DfE capital funding with partner investments to establish two new buildings in Exeter, providing a purpose-built, professional environment for teaching a range of digital technologies and data sciences.

"the South West Institute of Technology will deliver industry standard, higher level technical education from levels 4 to level 7 for the digital and advanced manufacturing sectors"

A SWIOT Employer Leadership Group and Observatory will be established to track labour market and industry trends and to ensure that provision is tailored to employers' needs and meets industry standards.

A SWIOT Staff Development Academy will support recruitment and development, translating SWIOT Observatory findings into practical advances in evidence-based teaching and learning.

Funding request

The total SWIOT Capital programme is valued at £25.1M, including a request for DfE capital funding of £15.1M. This funding will support a mix of new build, refurbishment and equipment at delivery sites across the region ensuring extensive coverage of the SW's travel to learn areas.

This business case requests funding of £16m.

Rationale for the project

Skills gaps and recruitment difficulties are a major constraint to growth in digital and data analytics-based sectors. This project will deliver the intermediate and higher-level technical skills required to drive employer competitiveness in key strategic high-productivity sectors for Exeter and the wider region.

Young people's awareness of the interesting and rewarding employment opportunities in these sectors is poorly developed.

Exeter College is experiencing difficulties recruiting talented teaching staff, including staff from industry, with cutting edge digital and data skills.

There is a need for innovation and improved approaches to the teaching in maths and computer science and to ensure that these approaches are informed by the latest industry practice.

Economic outputs

The training delivered during SWIOT's first five years of its operation is estimated to generate an increase in the earnings of individuals trained by £44m over the course of their working lives.

↑ **£44m increase in the earnings of trained individuals**

On the basis that SWIOT generates the profiled skills / qualifications at a constant state over the first five years of operation, the impact of the Exeter University and Exeter College's contribution to SWIOT on individuals earnings over the first five years of operation is around £8.5m and an estimated productivity impact of around £13.75 million over its first five years.





Section 2.4

Theme 4: Enabling Environment

Ensuring the right enabling environment is key to ensuring that our City can harness the collective energies of business and institutions across the City to make change and deliver the proposed economic outputs of our industrial strategy.

This theme contains a single proposal to develop a single organisation that formalises the collaboration across the City and creates a programme office to own the transformational goals for our City and mobilise and coordinate organisations and individuals to work towards the delivery of our city vision.

Putting in place the right institutional capability and capacity will be crucial in unlocking the benefits highlighted elsewhere in this proposal. In this sense, the economic benefits of this proposal are indirect, but they crucially reflect the enabling aspect of this proposal. Without having the right institutional support in place, the benefits will be delivered more slowly, in a less integrated fashion and in a lower quality.

Proposal 9: Exeter City Futures

Project brief

Exeter City Futures is an independent Community Interest Company that is working to help Exeter to solve its urbanisation challenges in a way that reduces social inequality and contributes to economic growth. Our vision is to help Exeter live better by bringing together local government, private sector and communities through a single programme to jointly solve the big challenges facing our city. Through a range of innovation and data programmes we are co-creating solutions that meet the needs of the City and inspiring action that contributes towards sustainable change.

Funding request

The total funding request is £6.7m over 5 years.

The request represents £350k pa to establish and fund an independent City Programme Office team to manage and measure progress towards the Goals. The team would coordinate projects to address the Goals, build a network of organisations with the right governance structure to embed long-term change and actively promote and share the model for change being delivered in Exeter to support other Cities.

In addition a further £5m fund is requested to support organisations across the City (and the wider region) to access and co-create innovations that deliver our Goals. Funding would be allocated by the cross-stakeholder Board of Exeter City Futures to support:

- Facilitation and workshop support to city organisations to undertake analytical challenge definition and identify clear challenges to be solved
- Acceleration support and grants for commercial and social enterprises to build sustainable projects and businesses that address our city goals
- Open competitions offering funded pilots to start-ups and social enterprises who have the potential to address challenges
- Funding for data collection equipment that can support development and delivery of collaborative innovation projects

Rationale for the project

Exeter is a City that is growing fast, we have an opportunity to provide a blueprint for how other cities can address the challenges of continued economic and population growth. Financial constraints and the complexity of the challenges faced by Cities restrict what can be done by local authorities alone. There is a need for a new model.

As Exeter continues to grow and we build the housing numbers required to support this growth, it is critical that we form strong collaborative partnerships across the city including with Devon County Council and neighbouring authorities to ensure that we can meet our vision of a connected city that is a great place to live, work, study, visit and socialise in.

Exeter City Futures enables the City Council to formally partner with other leading organisations from across the city to harness individual effort, create shared responsibility for delivering a better Exeter and bring coordination and focus to the challenges we face.

Through this programme we aim to create the right governance structures which will provide clarity of vision, commitment to place making and stability which enables the city to manage risk and raise investment. Exeter City Futures will function as a city programme office; holding a set of shared goals, removing the need for individual negotiations and business plans and working at a faster pace to deliver for all organisations within the City.

"We aim to create the right governance structures which will provide clarity of vision, commitment to place making and stability which enables the city to manage risk and raise investment"

Economic outputs

The proposal does not directly deliver economic outputs that can be quantified. Instead Exeter City Futures is an enabling programme that formalises partnerships and ensures the efficient and coherent delivery of all the projects within this proposal. Exeter City Futures brings greater surety that the other projects go ahead in a timely manner, are of high quality and that they fit with strategic aims.

Concluding Remarks

Our vision and delivery plan for Exeter supports and enhances the identified pillars of government's Modern Industrial Strategy.

The commitment, now, from central government will help us to demonstrate that our collaborative approach is a solution to Exeter's (and other cities') growth targets and its place-making vision.



Moreover, with central government committed to helping us taking a fresh approach to the infrastructure investment it will likely need to make anyway over the next 20 years in the area, we can build a more financially efficient, planning controlled investment programme that truly delivers for Exeter's ambition as well as providing a benchmark for the UK's industrial strategy and plans for clean, inclusive, sustainable cities.

The City has a growing list of supporters and programmes which complement the approach described in this proposal. To truly deliver the place-based industrial strategy our approach recognises the team of stakeholders and their importance to the programme:

- **Exeter City Council** - ECC is the driving force behind the city's transformational programme and is the key partner to ECF in its role as the innovation and sustainable finance enabler. The Council is already exploring strategic sites across the city to develop sustainable urban villages through a new vehicle. Our sustainable finance approach seeks to collaborate and build on that work to deliver a truly scaled solution.
- **The University of Exeter** - with a new Innovation, Impact and Business team, the university is ambitious in its plans for regional economic transformation and recognises the strength in delivering the City's vision in partnership with the City Council and ECF. The University is also establishing a new Institute for Data Science, and is a partner in SetSquared, recognised last year as the number one University-Business incubator in the world
- **Royal Devon and Exeter NHS Trust** - The health agenda is at the heart of the benefits within the programme. As Trust is currently considering its own site development plan including decisions around land disposal, housing, retail and car parking, it recognises the need for innovative input on design solutions and potential financing models.
- **Exeter College** - Recently rated as the number one FE College in the Country by FE Week, the College and the University have submitted an Expression of Interest to bid for an Institute of Technology, specialising in Data Science and data Analytics. Along with upcoming data apprenticeships planned at ECF, the College is integral to the key innovation and data themes and part of building our support for the collaborative, innovative approach required.
- **The Met Office** - The Met Office has an international reputation for world-class environmental science: its climate research centre, the Hadley Centre, has been ranked as the world's leading geophysical institution, ahead of Harvard and Princeton, in terms of the influence of its peer reviewed publications. The recent south-west Science and Innovation audit classified the MET Office as a key regional asset and catalyst for growth.
- **County and District Councils** - through the Greater Exeter Strategic Plan (GESP), wider planning development in the region and more devolved asset management in the next two decades, the Councils in the Greater Exeter area are key partners in the joined up approach recognised as required.
- **Exeter City Futures Partner Network** - the ECF partner network, comprised of city-wide professional services and infrastructure firms, is already mobilised, having signed declarations of support for the programme, pledged expertise, attended strategic planning events and shared critical data sets for analysis in feasibility project work.

This stakeholder group is in Exeter is making an intervention now. Recognising the need for reform in how we develop and interact with our cities and its citizens and recognising the opportunity that exists to harness better finance, data, and innovation, the collaborative approach set out in this White Paper is a bold solution.

With the support of this group, and alongside central government, Exeter is ready to deliver the place-making benefits that will be an example of success for the UK's industrial strategy.

