

Gloucestershire's

Local Growth Plan



Our priorities for Economic Development
(2025 to 2035)

Future →
Gloucestershire



Local Growth Plan

How we will create Gloucestershire's future – together.

Contents

| | |
|---|--|
| 4 Gloucestershire's Local Growth Plan: What it is and why it matters. | 66 Gloucestershire's high growth sectors |
| 6 Opportunity and vision | 68 Secure technologies and digital |
| 9 Gloucestershire's five economic missions | 72 Agri-tech |
| 10 How we will measure success | 76 Advanced engineering and aerospace |
| 12 Mission 1: Talent and future skills | 80 Energy transition and low carbon innovation |
| 20 Mission 2: Supporting employment opportunities for all | 86 Gloucestershire's economic ecosystem |
| 32 Mission 3: Thriving communities and culture | |
| 42 Environment, housing, and infrastructure | |
| 54 Mission 5: Innovation, investment and enterprise | |

Gloucestershire's Local Growth Plan: What it is and why it matters

Gloucestershire's Local Growth Plan (LGP) sets out a bold and inclusive economic vision to enhance prosperity, the environment and wellbeing for all.

It identifies five core economic missions and champions a collaborative, county-wide approach to delivery, bringing together public sector partners, businesses, education providers, the voluntary sector, and local communities to create opportunities for Gloucestershire's residents.

Through this shared commitment, the plan aims to unlock Gloucestershire's full economic potential, drive sustainable growth, and improve quality of life across every part of the county. It is designed to serve as a lever for investment by clearly articulating the county's unique strengths and opportunities.

Our founding ambition is that economic development will improve the lives of those who are most disadvantaged in our county.

As a forward-thinking, pro-business region, Gloucestershire's LGP outlines a strategic direction to create a thriving and resilient economy based on sustainable principles.

The plan highlights the importance we place on economic

development taking place within the context of a healthy and attractive natural environment and as a means of wealth distribution.

It has been shaped through stakeholder engagement and has been co-created by all of Gloucestershire's local authorities reflecting our shared priorities and collective ambition.

At its core, the plan identifies:

- + Five economic missions critical to Gloucestershire's economic success.
- + How Gloucestershire's high growth sectors will support delivery of the UK's Modern Industrial Strategy.

The Local Growth Plan is a live and fluid document that will be monitored and reviewed to maintain consistency with local economic priorities.

As Gloucestershire progresses through Local Government Reorganisation and its devolution journey, the LGP will need to evolve to become more focused with increased detail on its delivery priorities as additional funding is identified and secured.

Its success will depend on strong partnerships and collaborative delivery.

Our five missions at a glance



Our five economic missions provide guidelines to help us achieve our ambitions throughout any changes to our county's government structure.

Our missions are based on inclusivity, sustainability and collaboration.

Opportunity and vision

Gloucestershire is a remarkable place, renowned globally for its biodiverse and beautiful landscapes, the quality of its urban heritage, innovative businesses, vibrant festivals, and thriving culture.

It is a place where heritage inspires innovation, and where ambition is deeply rooted in the identity of its people and places.

This LGP is not just a celebration of what makes Gloucestershire great today. It's about setting out five critical economic missions that will propel Gloucestershire forward, shaping a future that is more economically inclusive for the county's residents.

This plan is unapologetically pro-business, recognising the vital role of SMEs, pioneering industries, and high-growth sectors in driving prosperity.

At the heart of this plan is a clear commitment: to champion Gloucestershire as a high-quality place to live, work, and invest.

But growth must be achieved within environmental boundaries to protect what makes Gloucestershire remarkable, it must also enable our unwavering commitment to achieving carbon reduction targets and becoming carbon Net Zero by 2045.

With competitive salaries, high-quality commercial space, and access to excellent schools and universities, our county offers a



wonderful lifestyle and affordable growth prospects for business.

Gloucestershire is a national leader in cyber, advanced manufacturing, digital innovation and equally in green growth. The county's thriving rural economy underpins opportunities in tourism, agroecology, restorative agriculture, and agri-tech.

This unique convergence of economic and environmental ambition places the county at the forefront of the UK's green growth agenda, where sustainability and competitiveness go hand in hand.

We are fully aware of the challenges ahead, raising productivity levels, tackling deprivation, delivering financially attainable housing, addressing climate change and closing the skills gap.

These are complex issues, but this LGP is designed to enable this change by facilitating the conditions that support economic opportunities for all while safeguarding the county's environmental assets.

Achieving this balance is critical to building a more inclusive, resilient future.

Strengths

-  Cyber/secure tech
-  Advanced manufacturing
-  Festivals
-  Agriculture/rural economy
-  Green growth
-  Digital innovation

Challenges

-  Deprivation
-  Housing barriers
-  Talent retention
-  Climate adaptation
-  Raising productivity levels

We want Gloucestershire to be ambitious for our people, our businesses and our planet - inspiring enterprise and innovation, leading to enhanced prosperity and wellbeing for all residents.



Together, we can shape a county that is fairer, smarter, greener, and even more remarkable than it is today. The five economic missions outlined in this plan will help us get there.

Gloucestershire's five economic missions

The five economic missions identified in the LGP provide a clear, strategic framework to enable inclusive, sustainable economic development across the county.

Businesses of all sizes, particularly our SMEs, are recognised as vital to the success of the plan in their capacity as engines of growth. Each mission represents a key driver of Gloucestershire's broader economic priorities, supporting

innovation, resilience, and long-term prosperity. They are intended to be cross-cutting enablers that support the county's diverse economy and help ensure that increased prosperity is experienced across every community.

1 Talent and future skills
"Unlocking talent, unlocking tomorrow"
 To secure the county's long-term economic resilience and productivity, we must invest in our talent pipeline by delivering a robust skills programme.

2 Supporting employment opportunities for all
"Wellbeing without barriers"
 For sustainable economic growth to be truly successful, it must be inclusive, giving equitable access to opportunity.

3 Thriving communities and culture
"A sense of place and belonging"
 Gloucestershire's thriving market towns and historic city are central to the county's identity, heritage and economic growth.

4 Environment, housing and infrastructure
"Building in balance with nature"
 Long-term spatial planning and infrastructure delivery are critical to supporting sustainable economic growth in Gloucestershire.

5 Innovation, investment and enterprise
"From vision to value"
 Gloucestershire's spirit of enterprise runs deep, rooted in a proud industrial and agricultural heritage.

People

Building a county where people of all ages and backgrounds feel connected to their communities, improving wellbeing and ensuring that everyone can access skills and training to improve their employment opportunities so that everyone can thrive.



Place

Giving confidence and stability for businesses to invest in Gloucestershire and create jobs that sustain prosperity, leveraging our historic towns and new flagship developments.

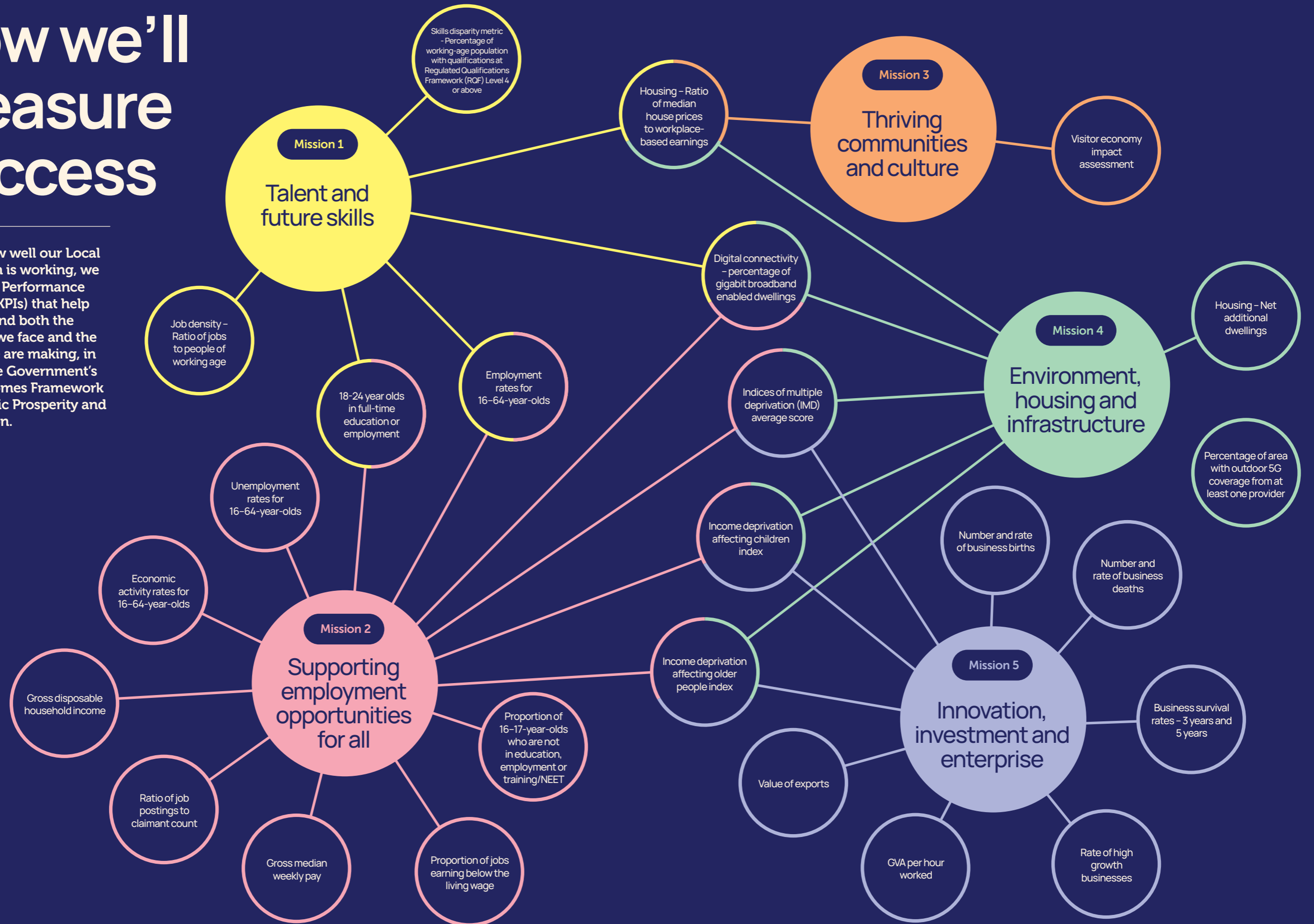


Planet

Realising that nature and biodiversity are the contexts in which businesses and people can thrive, using our exceptional natural landscapes as strategic assets to attract green growth

How we'll measure success

To track how well our Local Growth Plan is working, we will use Key Performance Indicators (KPIs) that help us understand both the challenges we face and the progress we are making, in line with the Government's Local Outcomes Framework for Economic Prosperity and Regeneration.





Mission 1

Unlocking talent, unlocking tomorrow

Talent and future skills



Unlocking talent, unlocking tomorrow

To secure the county's long-term economic resilience and productivity, we must invest in our talent pipeline by delivering a robust skills programme.

With an ageing population and increasing demand for high-skilled roles, our focus is on attracting and retaining working-age people to the county by enhancing Gloucestershire's appeal as a place to live, work, and study.

We will achieve this by raising awareness of the diverse career pathways available within the county.

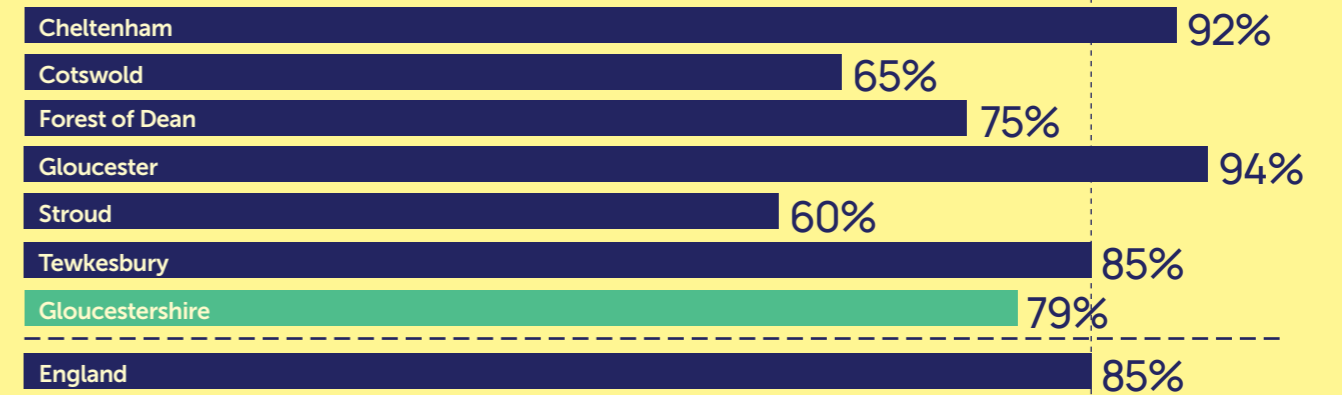
Gloucestershire must be seen as a destination of choice for education, enterprise, and opportunity.

How we will measure our success

- 1 Percentage of 16–18-year-olds who reached the end of 16-18 study and go on to sustained education, employment or training** (Source: Explore education statistics, DfE).
- 2 Employment rates for 16–64-year-olds** (Source: Annual Population Survey, ONS) - also linked to Mission 2.
- 3 Job density – Ratio of jobs to people of working age** (Source: Job Density, ONS)
- 4 Housing – Ratio of median house prices to workplace-based earnings** (Source: House price to workplace-based earnings ratio, ONS) - also linked to Mission 3 and 4.
- 5 Digital connectivity – percentage of gigabit broadband enabled dwellings** (Source: Connected Nations, Ofcom) - also linked to Mission 2 and 4.

* Additional and more specific indicators will be identified as the Plan is refined, and funding decisions are confirmed.

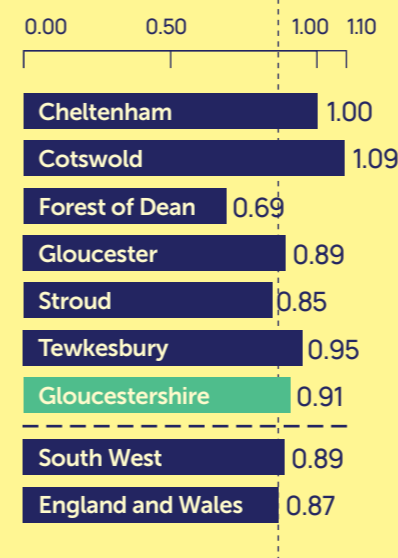
Percentage of premises with gigabit capability (2025)



SOURCE: Connected Nations Spring 2025, Ofcom Data from January 2025

The Government has an ambition to get gigabit broadband to at least 85% of premises by 2025 and over 99% by 2030. This indicator shows the percentage of premises that have coverage from a gigabit-capable service (download speeds of 1,000 Mbps or more). This data is provided by Ofcom, the telecoms regulator, which provides an official source of broadband data across the UK.

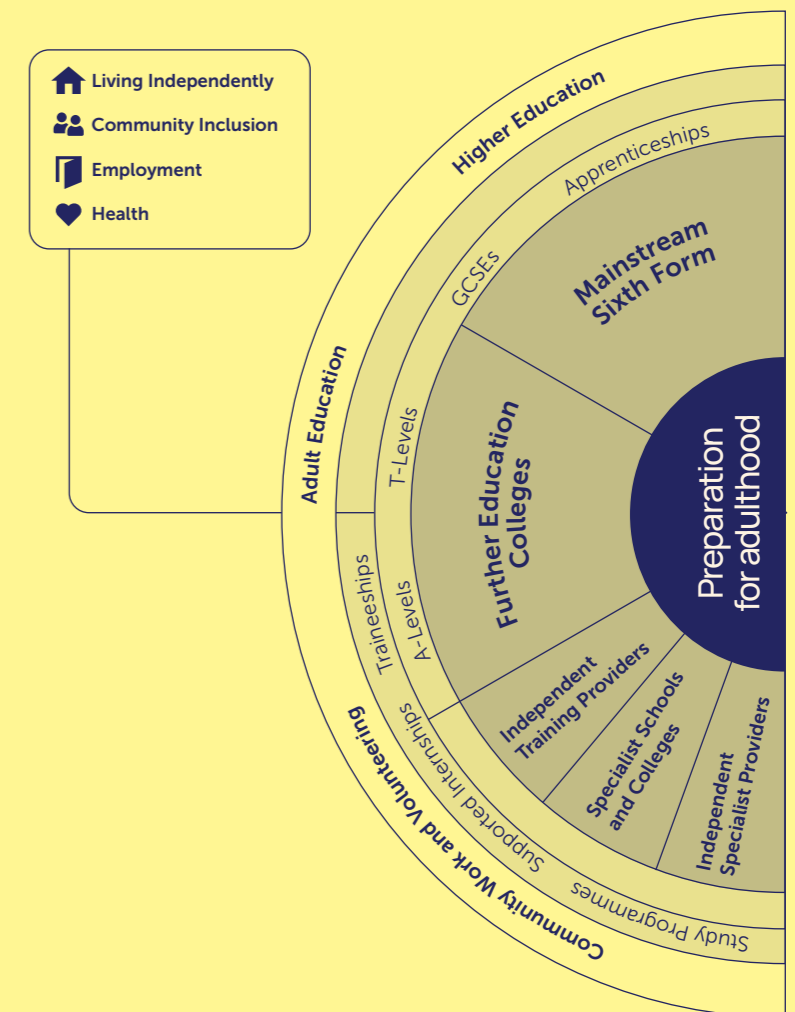
Job density (2023)



SOURCE: Job Density, ONS

Job density is an estimation of the overall balance between jobs and people. It is defined as the number of filled jobs in an area divided by the number of people of working age resident in that area. A job density of 1.0 would mean that there is one job for every resident of working age.

Gloucestershire post-16 pathways



Strengthening education and skills infrastructure

We aim to position Gloucestershire as a leading county for further and higher education.

Building on the success of Cheltenham and Cirencester as university towns, we will grow Gloucester's identity as a vibrant university city and promote the technical excellence of our colleges across the county.

This includes strengthening links with the University of Gloucestershire, Royal Agricultural University, Hartpury University and College and expanding access to courses aligned with our core economic

strengths and emerging high value sectors - such as green industries, cyber, engineering, and advanced manufacturing.

Our ambition is to attract more people to study in Gloucestershire and encourage them to build their futures here.

To do this, we will support our universities and colleges as centres of excellence - driving innovation, research, and skills development that meet the needs of a rapidly evolving economy.

We will work with business to encourage entry level/graduate employment opportunities and enable the delivery of affordable and high-quality housing. We also recognise the importance of inclusive growth.

That means supporting a broad skills programme to include cyber, manufacturing, construction, agriculture, hospitality, food services, healthcare, retail, and education, with a particular focus on initiatives that promote social mobility, community wellbeing, and access to opportunity for economically inactive residents and those facing health or other challenges.



Stroud

Retrofit Skills SME Partnership

Stroud is playing a leading role in building Gloucestershire's retrofit skills pipeline by forging strong partnerships between local SMEs, further-education providers and the public sector.



Cotswold

RAU Innovation Village

The Royal Agricultural University's Innovation Village is set to become one of the UK's most ambitious rural innovation campuses - a 12-hectare, landscape-led development designed to accelerate solutions for sustainable land use, food security and the transition to net zero.



Cheltenham

Careers Hub and CyNam Placements

As Gloucestershire's recognised cyber and technology cluster, CyNam (Cyber Cheltenham) connects start-ups, major employers, government, academia and investors, and plays a critical role in developing the region's digital talent pipeline.



Gloucester

University City Campus Mentoring

The University of Gloucestershire's new City Campus is becoming a focal point for strengthening the county's skills infrastructure, with its Professional Mentoring Programme providing students with direct access to industry expertise and personalised career guidance.



Forest of Dean

Woodland Apprenticeships

The Forest of Dean is strengthening its green skills pipeline through woodland and forestry apprenticeships that provide hands-on training, professional qualifications and real-world experience in one of the UK's most historic and biodiverse woodland landscapes.



Tewkesbury

Advanced Manufacturing Apprenticeships

Tewkesbury is home to one of Gloucestershire's most significant centres of advanced manufacturing and aerospace engineering, anchored by major employers such as Moog Aircraft Group, whose long-established apprenticeship programmes are helping build a pipeline of highly skilled engineers for the region.



Connecting education, skills, and talent development with economic needs

Gloucestershire boasts a highly skilled population and a strong reputation for educational excellence. Yet, disparities in educational attainment remain across communities, often reflecting wider social and economic vulnerabilities.

These gaps can restrict opportunities to access employment, reduce income potential, and undermine long-term wellbeing.

To address this, we will strengthen collaboration between education providers and employers to better align local training opportunities with the evolving needs of the economy.

Existing initiatives such as the Gloucestershire Careers Hub, CyNam, and Employer Representative Bodies are already playing a vital role in connecting young people with local opportunities and nurturing future talent.

Projected growth in green, cyber, digital, engineering, and advanced manufacturing sectors highlights the urgency for greater digital inclusion and stronger industry-education partnerships.

The increased use of Artificial Intelligence (AI) and digital technologies may lead to job displacement in some areas, but this also presents opportunities for innovation and competitive advantage. We will work with industries to understand these nuanced impacts and expand retraining and reskilling opportunities - ensuring transparency and collaboration between employers, employees, and policymakers.

By aligning education, skills, employer needs and economic development, Gloucestershire can build a future-ready workforce and ensure that all residents can contribute to and benefit from the county's growth.



Delivery priorities

- 1.1** | Expand inclusive, high-impact skills programmes to meet evolving workforce needs across all communities.
- 1.2** | Launch youth enterprise and build upon existing training pathways to grow local talent and support Gloucestershire businesses and start-ups.
- 1.3** | Collaborate and build upon existing relationships with local universities, schools, colleges, and industry to deliver tailored skills programmes aligned with devolution and growth sector demand.
- 1.4** | Position Gloucestershire's universities and colleges as national centres of excellence - attracting students, retaining graduates, and powering innovation.
- 1.5** | Accelerate training and opportunities for green jobs which have a direct impact on combatting carbon emissions including construction and retrofit, trade, nature recovery and MMC (Modern Methods of Construction).
- 1.6** | Champion and promote opportunities in digital and Artificial Intelligence (AI) skills by investing in agile, inclusive training pathways that respond to rapid technological change.
- 1.7** | Encourage Gloucestershire businesses to invest in training, upskill employees create new apprenticeship opportunities and to improve career pathways.
- 1.8** | Promote visibility of entry-level career opportunities across all industries to foster a "grow your own" workforce culture.

Local supporting strategies

- + Get Gloucestershire Working
- + Local Skills Improvement Plan (LSIP)
- + GCC Green Skills Strategy
- + Gloucestershire Local Authorities' Economic Strategies



Mission 2

Wellbeing without barriers

Supporting employment
opportunities for all



Wellbeing without barriers

For sustainable economic growth to be truly successful, it must be inclusive. This means removing barriers faced by economically inactive individuals, those with health challenges, and communities experiencing disadvantage.

Equitable access to opportunity is not only a moral imperative - it's essential for building a thriving, resilient economy.

While Gloucestershire is broadly affluent, pockets of deprivation persist across both urban and rural areas. These disparities are closely linked to social inequality, health outcomes, and life expectancy and are likely to be exacerbated by accelerating climate impacts.

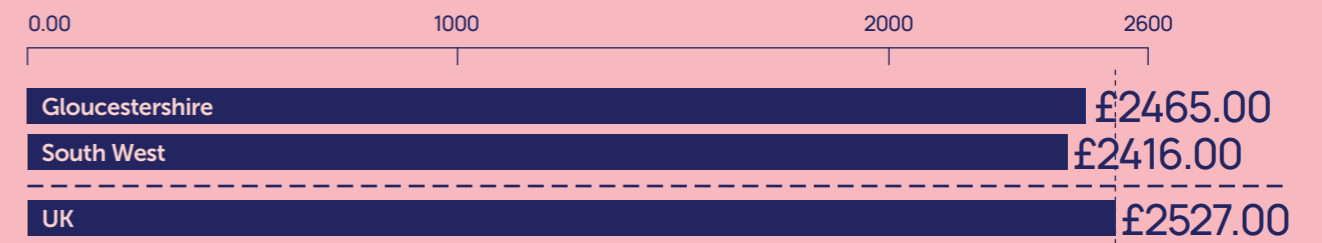
Addressing these inequalities and improving the resilience of our communities is central to our inclusive growth agenda.

How we will measure our success

- 1 **Employment rates for 16–64-year-olds** (Source: Annual Population Survey, ONS) - also linked to Mission 1.
- 2 **Unemployment rates for 16–64-year-olds** (Source: Annual Population Survey, ONS).
- 3 **Economic activity rates for 16–64-year-olds** (Source: Annual Population Survey, ONS).
- 4 **Ratio of job postings to claimant count** (Source: Lightcast and the Claimant Count, ONS).
- 5 **Digital connectivity – percentage of gigabit broadband enabled dwellings** (Source: Connected Nations, Ofcom) - also linked to Mission 1 and 4.
- 6 **Gross median weekly pay.**
- 7 **Proportion of jobs earning below the living wage** (Source: ASHE, ONS).
- 8 **Proportion of 16–17-year-olds who are not in education, employment or training/NEET** (Source: Explore education statistics, DfE).

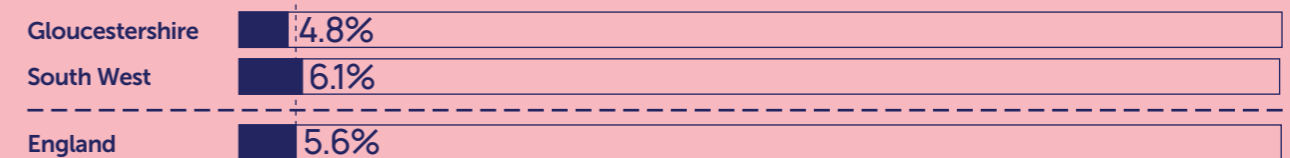
Additional and more specific indicators will be identified as the Plan is refined, and funding decisions are confirmed.

Median gross monthly pay as at June 2025



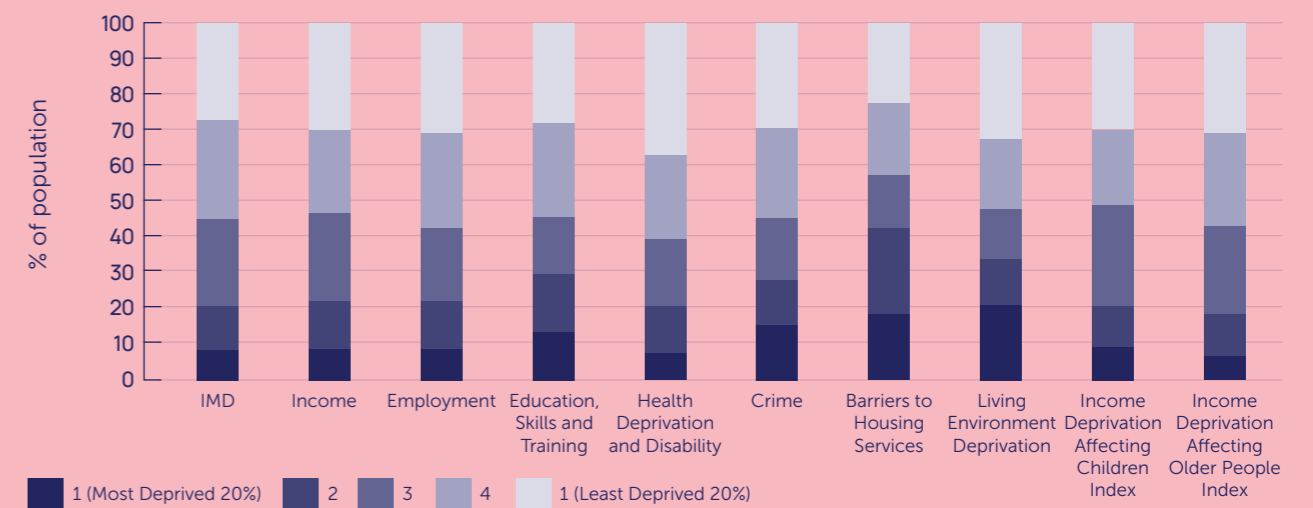
SOURCE: Earnings and employment from Pay As You Earn Real Time Information, UK: August 2025

Proportion of 16-17 year olds classed as NEET or not known (2025)



SOURCE: Explore Education Statistics, DfE

Proportion of Gloucestershire's 2024 population by indices of Deprivation 2025 Domains and National Quintiles



Quality affordable housing and access to skills training are critical enablers of inclusive growth. By improving access to both, we can help lift people out of poverty, support healthier lifestyles, and enable more residents to participate fully in the local economy. This includes supporting entry-level pathways, retraining opportunities, and targeted support for those furthest from the workplace.

We are committed to championing inclusion for disabled people and neurodivergent individuals across Gloucestershire. To achieve this, we will seek investment not only to support individuals in accessing meaningful employment, training and skills development, but also to empower employers with the tools, knowledge and confidence needed to foster inclusive and supportive workplaces. Initiatives

such as Inclusivity Works play a vital role in raising awareness and providing practical guidance, and we will continue to build on these platforms. Creating inclusive environments is just as critical as enabling individual success and both are essential to building a fairer, more resilient local economy where everyone can thrive.

Improving opportunities for all

In 2025, 12 of Gloucestershire neighbourhoods were classified as being in the most deprived 10% nationally. These areas account for 20,960 people (3.1% of the county population).

Based on the 2025 Indices of Multiple Deprivation the key issues impacting these neighbourhoods are: Income, Employment, Education, Skills & Training and Health. These issues can impact on each other and create barriers to residents being lifted out of deprivation.

These are complex issues which require a multi-agency approach to address the range of factors which can impact on someone's opportunities in life, and their access to things like employment, good health, and a safe place to live.

Evidence shows that 'good work' (a safe and secure job with good working hours and conditions) can improve health and wellbeing and protect against social exclusion.

Building on the success of the Gloucestershire Employment and Skills Hub, new countywide programmes like Connect to Work are supporting people who have been out of work or facing barriers to entering or retaining employment.

Projects like LEAH (Linking Employment and Health) are also working alongside health and care professionals, and community organisations to support people with a disability or health condition into work in a way which best meets their needs and aspirations.

The Local Growth Plan has a clear role in supporting targeted Education, Skills and Training programmes with those communities and neighbourhoods that experience the most disadvantage.

Where health is a barrier, there are opportunities to engage with employers to support inclusive, healthy working practices. Initiatives, such as the Gloucestershire Healthy Workplaces' accreditation scheme provide guidance and practical tools to businesses to create healthier, happier workplaces.

Positive inclusive growth relies on listening to and working alongside communities to understand what's important to them and build on local assets. Our local Voluntary, Community and Social Enterprise (VCSE) sector also offers a range of community-based support to bring people together, and create positive social connections, which can in turn improve our mental and physical health, and reduce social exclusion.

The launch of Gloucestershire's network of Family Hubs will make it easier for families to access support when they need it by connecting families with their communities and the services that can help them thrive.

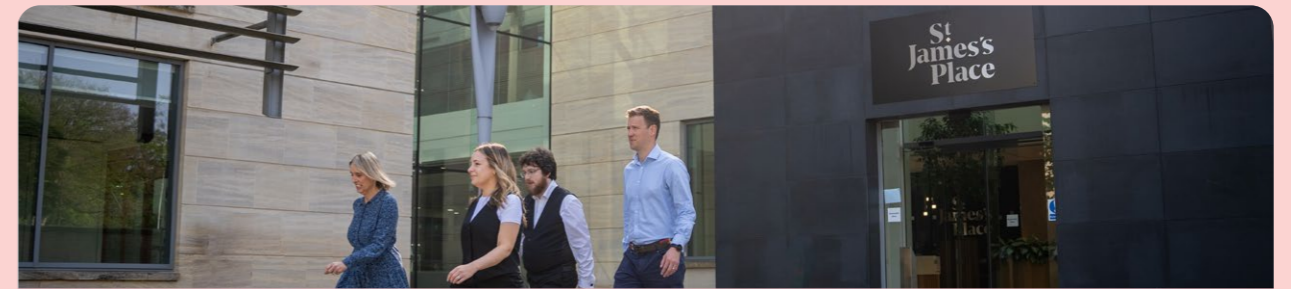
In recent years, community grant funding has also seen additional investment in community-led project and initiatives, through programmes such as the Thriving Communities Grants, Grassroots Neighbourhood Fund and the Government's Household Support Grant.

Whilst the number of Gloucestershire based young people 'not involved in education, employment, or training' (NEET) compares favourably with national trends, it has been identified as a priority area for the county due to a huge rise in the number of young people becoming NEET after year 11 since 2020.

There has also been a steady rise in the number of young people identified as 'at risk' in our schools over recent years.

Employability and skill development activity for these young people is essential to help improve their post 16 destinations. Therefore, the Gloucestershire Careers Hub has a focus on creation of high-quality work experience opportunities for socioeconomically disadvantaged young people aiming to enhance their work readiness and career prospects.

These initiatives reflect National Careers and Enterprise Company's commitment to improving outcomes for young people from disadvantaged backgrounds through targeted support services.



Healthy Workplaces

Healthy Workplaces Gloucestershire

Healthy Workplaces Gloucestershire is a free programme that helps employers create happier, healthier and more productive workplaces. It offers expert guidance, practical tools and a clear process to strengthen staff wellbeing across all areas of work.



Family Hubs

Employment and early support for Gloucestershire families

Family Hubs are welcoming, one-stop spaces for all families with children and young people aged 0-19, or up to 25 for those with additional needs. Whether families are looking for advice, activities or simply a friendly face, Gloucestershire's network of Family Hubs is here to help.



Inclusivity Works

Supporting inclusive employment across Gloucestershire

Inclusivity Works is a dedicated employer resource that brings together good news stories, best practice, practical guidance and encouragement for organisations across Gloucestershire.



Community Transport

Community Transport in Gloucestershire

Community Transport sits within the voluntary sector and is delivered by charities and volunteer-led groups. Working alongside the mainstream public transport network, it helps ensure Gloucestershire has a resilient and accessible transport system.



Delivery of Digi-Hubs

Rural digital hubs (libraries/villages)

Gloucestershire Digi-Hubs aim to tackle digital exclusion by offering free, tailored digital support in accessible community spaces across the county.





Credit: The Music Works

Supported by our VCSE organisations

Gloucestershire's voluntary and community sector (VCSE) is a vital and dynamic part of the county's social and economic landscape. The strength, diversity and innovation within the sector play a central role in shaping this Local Growth Plan, ensuring that it reflects the realities, aspirations and priorities of communities across Gloucestershire.

VCSE organisations contribute essential knowledge, lived experience and specialist expertise

that help inform strategic direction and drive meaningful, inclusive growth. Their presence across every part of the county, from grassroots community groups, to large charitable organisations, provides an invaluable foundation for wider system planning and long-term resilience.

The Gloucestershire VCSE Alliance provides coordination, insight and strategic representation, frequently acting as a key partner in engagement with statutory bodies

including Gloucestershire County Council and the Integrated Care Board (ICB).

Through this role, the alliance ensures that the voices, needs and perspectives of VCSE organisations are recognised, understood and embedded within decision-making across the system - reinforcing the essential contribution that the VCSE sector makes to Gloucestershire's growth, wellbeing and future prosperity.



Digital skills and inclusive growth

Digital literacy is no longer optional, it is fundamental to accessing employment, education, healthcare and social opportunities. Digital inclusion is essential to ensure that everyone, regardless of their background or circumstances, has access to the benefits of digital technologies.

It involves providing equitable access to digital tools, resources, and skills, so that all individuals can participate fully in the digital economy.

By addressing barriers such as affordability, digital literacy, and accessibility, we can create a more inclusive society where everyone can thrive in a digital world.

AI offers immense opportunity, but also presents sustainability

challenges in its use, including the potential impacts on job creation and displacement of some roles, and the significant energy use required to power the technology. These forces are reshaping industries, redefining job roles, and demanding new skills at every level.

Living with change means leading through it. Gloucestershire is embracing the seismic shifts brought by AI, automation, and digital transformation.

We must reimagine our skills ecosystem, from foundational digital literacy to advanced

AI capabilities. This means empowering residents with the digital confidence to thrive in a tech-driven world, equipping businesses and leaders with the tools to innovate, adapt, and grow, and creating agile training pathways that respond to emerging technologies and evolving workforce needs.

Gloucestershire will be at the forefront of delivering the UK's digital, AI and technological ambitions - not just reacting to change but shaping it. By committing investment in skills, inclusive education, and industry partnerships, we will build a future-ready workforce that drives innovation, attracts investment, and ensures no one is left behind.

Nature, wellbeing and inclusive opportunity



We also recognise the importance of healthy, active lifestyles in maintaining a strong local workforce.

That means providing accessible leisure and health activities, promoting active travel, and ensuring that our lifestyle offer

meets the diverse needs of our communities.

Access to nature plays a critical role in improving physical and mental health, reducing social isolation, and enhancing quality of life. Gloucestershire's rich natural environment - including

its National Landscapes and green spaces must be protected and leveraged as health assets.

This complements our wider ambitions for increased nature recovery across our landscapes and encouragement of regenerative agriculture.



Delivery priorities

- 2.1 | Deliver targeted, multi-agency programmes to tackle poverty and inequality in the most deprived communities.
- 2.2 | Boost and enable more people to participate fully in the local workforce by increasing inclusive opportunities for 'good work', supporting entry level pathways and ensuring accessible, sustainable transport options are available connecting people to employment opportunities.
- 2.3 | Engage with employers to embed inclusive, healthy, and flexible working practices.
- 2.4 | Support economically inactive residents and those with health challenges through tailored pathways into training and employment in line with Gloucestershire's Get Britain Working initiative.
- 2.5 | Strengthen the Careers Hub to improve post-16 outcomes for disadvantaged young people through focused employability support.
- 2.6 | Promote access to nature, active lifestyles and travel to build a healthier, more mobile workforce and improve social mobility.
- 2.7 | Address the digital skills divide through enhanced digital inclusion initiatives.
- 2.8 | Make online safety a core part of digital inclusion for residents, employers, and employees.
- 2.9 | Harness the benefits of AI and emerging technologies while working with industry to prevent inequality and job displacement.

Local supporting strategies

- + Local Skills Improvement Plan (LSIP)
- + Get Gloucestershire Working
- + GCC Emerging Green Skills Strategy
- + GCC Digital Inclusion, Infrastructure and Innovation Strategy
- + Gloucestershire Local Authorities' Economic Strategies





Mission 3

A sense of place and belonging

Thriving communities and culture



A sense of place and belonging

Gloucestershire's thriving market towns and historic city are central to the county's identity and heritage. Each place contributes its own story, shaped by history, community, and character.

This diversity is a strength but also brings shared challenges - particularly around the transformation of traditional high

streets, the renewal of the built environment, and the need to attract new business and deliver financially attainable housing.

The county's vibrant cultural and creative arts industries are integral to this identity and are a key focus for growth and support, particularly as a nationally recognised sector. Embracing these opportunities will be key to ensuring Gloucestershire remains vibrant, inclusive, and economically resilient.

How we will measure our success

- 1 Visitor economy impact assessment (Source: CotswoldPlus LVEP)

Additional and more specific indicators will be identified as the Plan is refined, and funding decisions are confirmed.



Culture as a catalyst for growth

Culture is central to Gloucestershire's identity and economic vitality. The county's renowned festivals, historic landmarks, sporting excellence and creative industries connect communities, attract visitors, and foster pride. Cultural assets not only enrich lives but also support local economies and social cohesion.

Embedding culture in regeneration enhances identity and supports inclusive, people-centred growth. Locally specific, place-based strategies and leadership actively contribute to the cultural, heritage, and economic health of our communities.

We will continue to collaborate with towns, parishes,

businesses, and community stakeholders to shape the fabric of daily life and experiences for all residents and visitors.

Cheltenham is recognised as a national cultural exemplar and serves as a creative and economic catalyst for the county, with its renowned festivals and events driving visitor spend and supporting local businesses. This strengthens and enhances the county's profile as a destination for investment and talent.

Its vibrant cultural calendar plays a vital role in sustaining the hospitality sector and strengthening an already richly diverse county visitor economy, attracting thousands of visitors annually and generating significant economic value for the region.





The role of sport

Sport is one of the few sectors that drives multiple outcomes including GDP growth, job creation, health outcomes and community cohesion.

Used smartly, it is a regeneration tool supporting rural and town centres, the hospitality sector and tourism.

Gloucestershire has a rich culture of sport – rugby, cricket, football, horse racing etc. Hartpury University and Hartpury College is a national centre for sports

education and the University of Gloucestershire, local colleges, and community hubs support the ecosystem.

There is significant potential for job creation (e.g. coaching, facility management, events, hospitality, sports science – especially for young people and career switchers) and sport-related events (e.g. Cheltenham Races, cricket matches, youth tournaments) which bring visitors, spending, and national profile.

Fitness tech, sustainable sport infrastructure, and inclusive sports services are all growth niches.

Sport can help tackle inequalities through programmes for girls/women, disabled people, low-income areas, and ethnic minorities. Gloucestershire has the top Women’s rugby team in the country. Sport can be a vehicle for inclusion, youth diversion (from crime), and social mobility.

Sport can also link into environmental leadership – Forest Green Rovers are already leading in sustainable sport and more sport venues could follow suit creating green jobs, reducing emissions, and drawing eco-conscious sponsors and visitors.

Gloucestershire’s sports clubs and events are powerful economic and cultural engines, driving regional prosperity and community pride.

Throughout the region, these clubs and events generate millions of pounds for our local economy. These institutions do more than just entertain – they create diverse career pathways in coaching, facility management, and sports science, while attracting global media coverage and international investment.



Gloucester Rugby

Gloucester Rugby is a major asset to the Gloucestershire economy, drawing thousands of visitors to Kingsholm Stadium each season and generating significant spend across local hospitality, retail and transport businesses.



Gloucester-Hartpury

Gloucester-Hartpury have become one of Gloucestershire’s most successful and high-profile sporting teams, driving both economic value and cultural change in the county.



Cheltenham Racing

Cheltenham is internationally renowned as the home of the Cheltenham Festival, the pinnacle of jump racing and one of the most significant sporting events in the UK.



Gloucestershire’s Equestrian Impact

The county benefits from a strong equestrian offer, featuring world-class facilities such as Hartpury University and College’s leading equestrian centre, which hosts international-calibre competitions, rider-performance research, and advanced equine therapy services.



Cheltenham Town Football Club

Cheltenham Town Football Club (CTFC) serves as a significant economic and social anchor for Gloucestershire, generating millions of pounds in local value through its operations, community outreach, and visitor draw.



Cheltenham Cricket Festival

As the longest running cricket festival in the world, Cheltenham Cricket Festival is a major driver of revenue for local businesses and attracts a diverse range of visitors to the county.



Forest Green Rovers

As the world’s first carbon-neutral and fully vegan football club, internationally recognised by FIFA as “the world’s greenest football club,” it draws global attention to the county and attracts visitors, media coverage and investment linked to its pioneering sustainability approach.



Sustainable tourism and green infrastructure

In 2024, Gloucestershire welcomed over 18-million-day visitors, contributing £720 million in daily spend and nearly £1.3 billion in visitor spend overall with the industry creating 7% of the county's employment.

It is also about future-proofing the visitor economy by adapting to issues caused by climate change, embracing off-season promotion, digital innovation, and skills development.

Sustaining this success requires a balanced approach to tourism - one that values local character, supports green infrastructure, and promotes year-round, climate-resilient visitor experiences.

It is imperative to enhance and capitalise on our existing natural, cultural and heritage assets such as our extensive waterway networks in Stroud and Gloucester and how these assets provide opportunity for leisure activities, quality of life and the area.

To ensure Gloucestershire continues to thrive as a visitor destination we will continue to encourage further adoption of green tourism practices.

This will enhance the value of the local offer while encouraging visitors to "slow tourism" increases opportunities to get visitors to spend more time and money in the county.

We are also committed to strengthening local supply chains, investing in green infrastructure, and promoting low-carbon and active travel - delivering both environmental and public health benefits.

We fully understand that the beauty and richness of the natural environment is critical to the attractiveness of so many locations in Gloucestershire as tourist destinations.

It is therefore commercially imperative, as well as ecologically imperative, that tourism is used as a reason to protect and improve our natural environments rather than to undermine them.

18 million
day visitors

£720m
contributed in daily spend

£1.3bn
visitor spend

7%
of county's employment from the industry



Delivery priorities

- 3.1** Deliver bold town and city centre strategies that drive regeneration, boost economic vitality, and connect communities with cultural spaces, heritage assets, and public realm improvements.
- 3.2** Create tailored regeneration plans that reflect the unique identity and needs of each place - unlocking public and private investment to revitalise communities.
- 3.3** Champion the creative arts industries as key drivers of inclusive growth, recognising their economic, social, and cultural value across Gloucestershire.
- 3.4** Promote local procurement and embed the 'Think Local, Think Gloucestershire' ethos to strengthen community wealth and support local businesses.
- 3.5** Work with Cotswold Plus Local Visitor Economy Partnership to grow a vibrant, year-round visitor economy that is sustainable, inclusive, and resilient to the impacts of climate change.

Local supporting strategies

- + Local Nature Recovery Strategy
- + Spatial Development Strategy
- + Local Plans
- + Gloucestershire Local Authorities' Economic Strategies



Mission 4

Building in balance with nature

Environment, housing, and infrastructure



Building in balance with nature

Long-term spatial planning and infrastructure delivery are critical to supporting sustainable economic growth in Gloucestershire. Well-planned, high-quality places enhance health, wellbeing, and quality of life.

Maintaining and enhancing the quality of the built environment for our communities is essential to support the county's sustainability goals, ensuring that places are well connected, environmentally friendly, energy efficient, and aligned with supporting climate targets and meeting the need for resilience and adaptation in the face of a rapidly changing climate.

Planning and infrastructure are critical to supporting growth in Gloucestershire. The Planning and Infrastructure Bill will introduce planning reforms including the requirement to produce a Spatial Development Strategy (SDS). Gloucestershire's SDS will be produced at pace and in collaboration by all Gloucestershire local authorities.

How we will measure our success

- 1 Housing – Ratio of median house prices to workplace-based earnings** (Source: House price to workplace-based earnings ratio, ONS) - also linked to Mission 1 and 3.
- 2 Housing – Net additional dwellings** (Source: Table 122 and 125, Live Tables on Dwelling Stock, MHCLG).
- 3 Digital connectivity** percentage of gigabit broadband enabled dwellings (Source: Connected Nations, Ofcom) - also linked to Mission 1 and 2.

Additional and more specific indicators will be identified as the Plan is refined, and funding decisions are confirmed.

Expanding our transport networks

Gloucestershire's strategic location - within an hour of Birmingham, Bristol, Oxford, and Cardiff, and two hours from London offers significant connectivity advantages. Maintaining and enhancing this access requires ongoing investment in infrastructure, including:

+ Improvements to the M5, M4 corridor, and A46 Midlands link.

+ Expansion of public transport networks to improve education, work and leisure access (bus, and rail).

+ Improved active travel networks and promotion of low-carbon mobility.

To address funding gaps in the delivery of infrastructure and services we will be exploring a range of alternative income streams.

This includes declaring the Golden Valley Development as a Designated Area. This will enable the retainment of 100% of the business rates generated within that zone to support local investment. By reinvesting the business rates into delivering the enabling infrastructure and priorities identified within the five economic missions this creates a virtuous cycle that unlocks further growth.

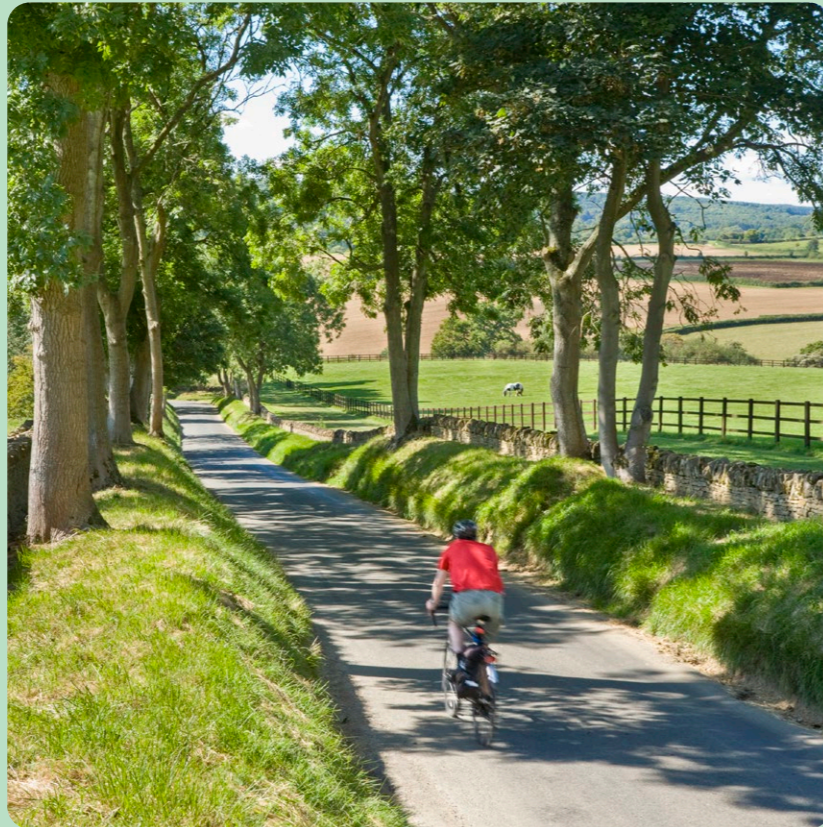


Enhancing, protecting, and managing our environment

Gloucestershire's natural environment is its largest strategic asset, offering exceptional biodiversity, scenic beauty, and recreational value.

The county benefits from three designated National Landscapes: the Cotswolds, Malvern Hills, and Wye Valley. These areas are fundamental to Gloucestershire's identity and offer significant opportunities for nature-based investment, sustainable tourism, and environmental leadership.

Green spaces, from parks and woodlands to river corridors and nature reserves are central to the county's identity and play a vital role in supporting physical and mental health, community cohesion, and climate resilience.



Cotswold Canals restoration project led by Stroud District Council's will provide improved wildlife habitats while increasing access for walking and cycling routes.

These landscapes support tourism, health, and wellbeing, while delivering vital ecosystem services such as flood mitigation, clean air, and carbon sequestration - estimated to be worth £500 million annually.

We recognise that economic growth and environmental sustainability are sometimes seen as competing priorities. However, Gloucestershire is committed to pursuing a model of development that not only minimises its environmental footprint but actively enhances the natural world.

Our ambition for the Forest of Dean to achieve UNESCO

Biosphere designation reflects this approach, promoting sustainable development, protecting biodiversity, and strengthening the area's reputation.

Evidence from other designated Biospheres indicates the benefits to the local economy with a clear return on investment in setting up a Biosphere, including supporting job creation.

A study created with the assistance of the Office of National Statistics (ONS) found that every £1 invested (by government agencies, organisations, and businesses) in a Biosphere would overall return a value of around £3.89 to the area.

This demonstrates that growth which respects and restores nature is not only possible, but economically advantageous.

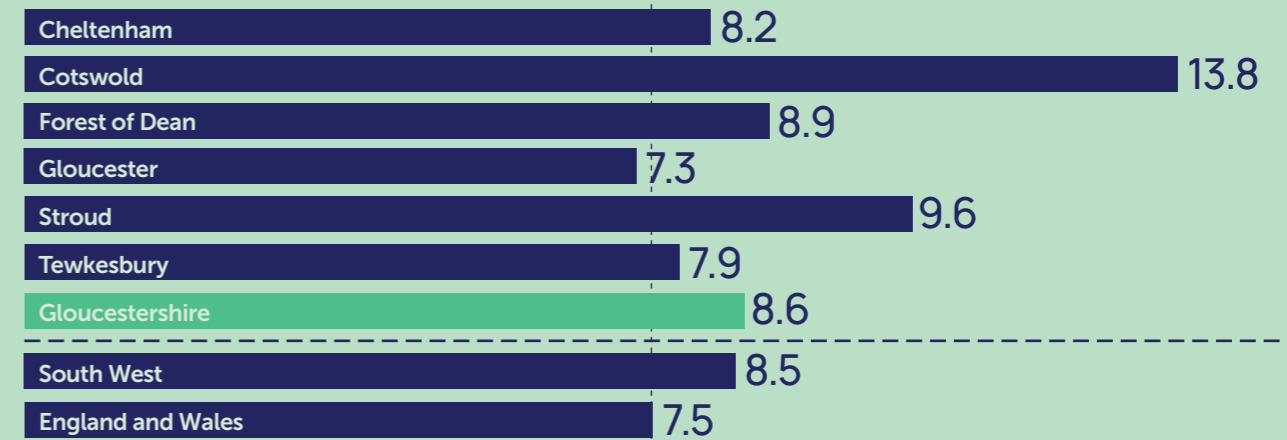
Nature recovery is essential to restoring ecological balance and enhancing biodiversity. It also supports future food security and resilience through long-term measures such as soil recovery and regenerative agriculture.

These efforts are closely linked to Gloucestershire's restorative agriculture opportunity, which combines innovation in farming with environmental stewardship and job creation.

We will also embrace circular economy principles to reduce waste, conserve resources, and ensure long-term sustainability. This includes harnessing the economic potential of nature-based investment and natural capital initiatives, which deliver positive outcomes for both the environment and local communities.

Median house prices to workplace based earnings

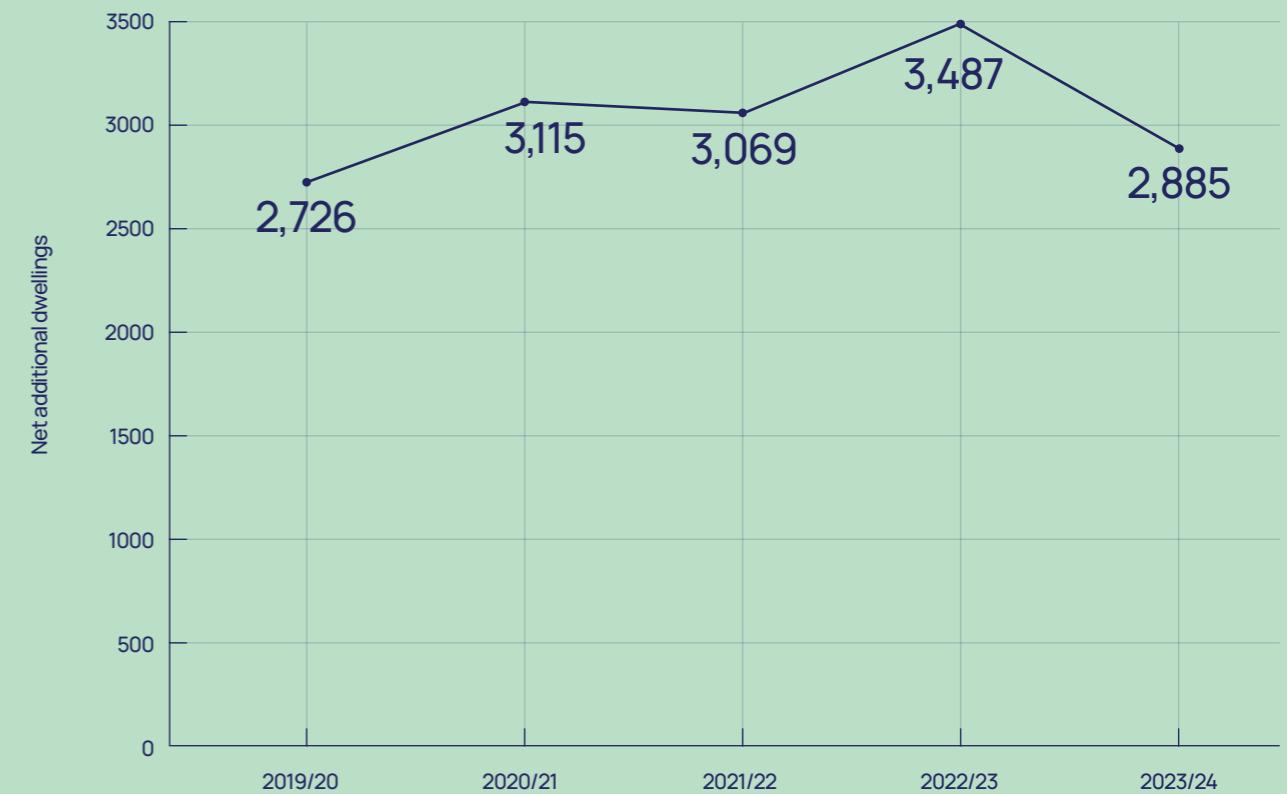
Ratio of median house price to median gross annual workplace-based earnings (2024)



SOURCE: House price to workplace-based earnings ratio, ONS

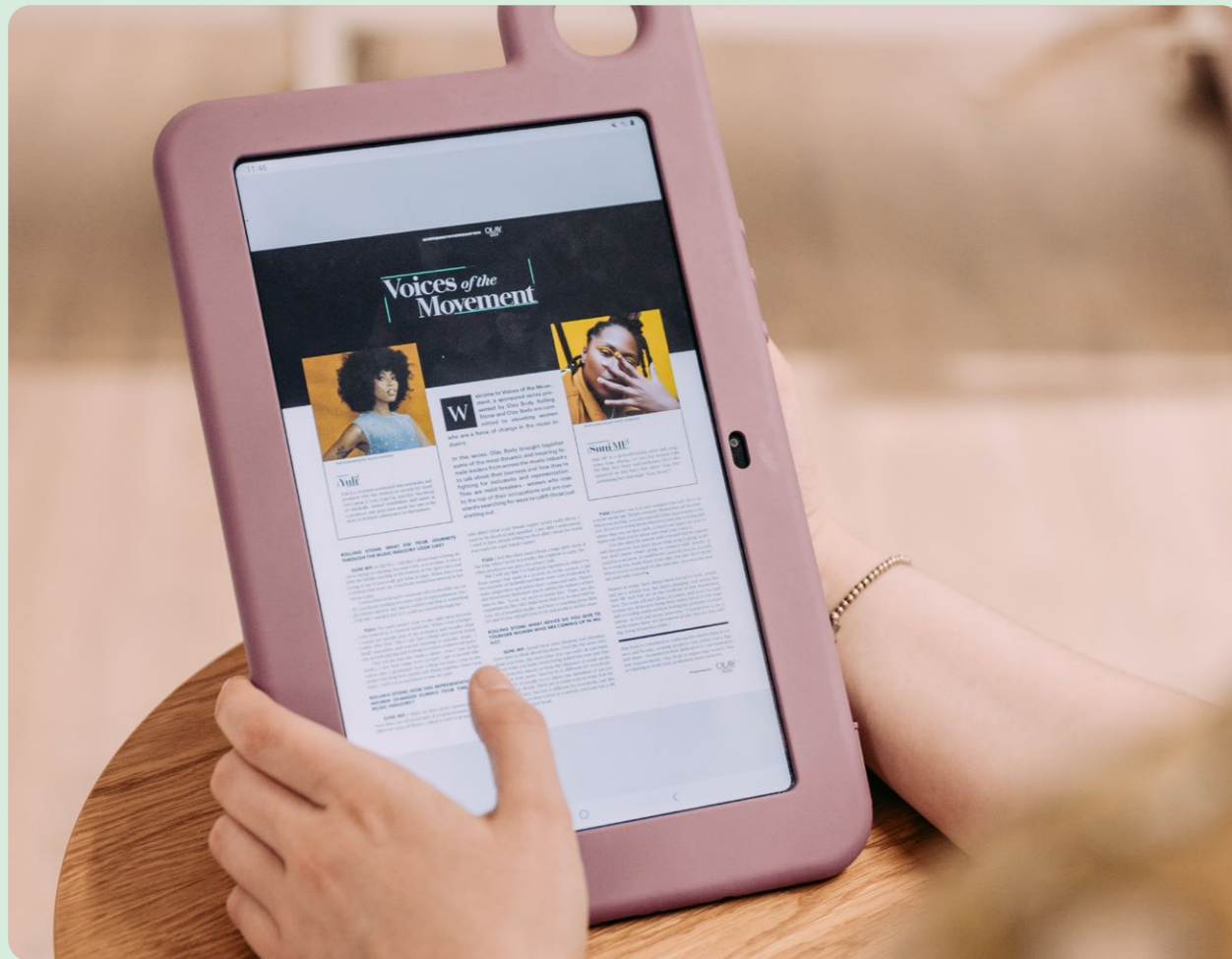
Median house prices to workplace based earnings: Housing affordability is key to economic health. High costs reduce disposable income, limit spending, and make it harder for businesses to attract staff, lowering productivity and growth.

Net additional dwellings



SOURCE: Table 122, Live Tables on Dwelling Stock, MHCLG

Net additional dwelling statistics measure the absolute change in housing stock between one year and the next, including losses and gains from new builds, conversions, changes of use (for example a residential house to an office) and demolitions. It is important for monitoring and understanding housing supply trends.



Digital Gloucestershire – an evolving county

Digital transformation is fundamentally reshaping how we live, work, and grow. We are entering a new phase of the digital revolution, driven by AI, automation, and data, where the pace of change is accelerating rapidly.

This is not just another wave of innovation; it marks a seismic shift in how economies function, and how people engage with technology.

To thrive in this evolving landscape, Gloucestershire must ensure that everyone has the skills to participate. That means supporting those with existing digital skills to

reach their full potential, while also ensuring that all residents have access to basic digital literacy, so no one is left behind.

Digital innovation is a powerful catalyst for economic growth. It boosts productivity, reduces costs, and enables businesses to compete nationally and globally.

Companies that fail to evolve risk falling behind, while those that embrace digital tools can innovate rapidly, adapt to changing

consumer expectations, and maintain a competitive edge.

In the context of the LGP, digital refers to a broad spectrum of technologies, not just cyber security, but also AI, machine learning, the Internet of Things (IoT), and digital platforms that enable business innovation, public service transformation, and inclusive economic growth.

This aligns with Gloucestershire County Council's Digital Infrastructure, Inclusion and Innovation Strategy, which highlights the role of digital in shaping Gloucestershire's future economy.



Gloucester

City Campus retrofit and flood-resilience planning

The redevelopment of Gloucester's former Debenhams building into the University of Gloucestershire's new City Campus is one of the region's most significant retrofit projects, transforming a long-vacant landmark into a sustainable, future-ready civic hub.



Tewkesbury

M5 Growth Corridor: logistics and sustainable transport

The Tewkesbury M5 growth corridor is one of Gloucestershire's most strategically important economic zones, sitting at the intersection of major national routes and linking local employment areas with the wider Midlands and South West.



Cheltenham

Golden Valley: zero-carbon infrastructure and climate-ready design

The Golden Valley development in West Cheltenham is designed as one of the UK's most sustainable new innovation districts, embedding zero-carbon principles across its masterplan.



Forest of Dean

Forest of Dean: proposed UNESCO biosphere designation

The Forest of Dean is advancing a major bid to become a UNESCO Biosphere Reserve, a designation that would recognise the area as a place where people and nature thrive together.



Stroud

Canal regeneration and green corridor projects

Stroud's ambitious canal restoration programme, part of the Cotswold Canals Connected partnership, is transforming the Stroudwater Canal into a major ecological, heritage and active-travel corridor for the district.



Cotswold

Affordable housing and heritage retrofitting

Cotswold District has an exceptional historic and natural environment which contribute to high property prices, but the Council and its partners are leading the way in delivering affordable housing and promoting energy efficiency initiatives.



Delivery priorities

- 4.1** | Streamline governance to fast-track spatial planning and unlock growth in Gloucestershire.
- 4.8** | Work with the Gloucestershire Nature and Climate Fund to unlock funding through Biodiversity Net Gain and deliver measurable environmental and community benefits.
- 4.2** | Deliver a county-wide Spatial Development Strategy in collaboration with GCC and district councils, incorporating shared local policies covering housing, employment, transport, climate change and nature recovery.
- 4.9** | Support the Forest of Dean's UNESCO Biosphere bid and protect Gloucestershire's natural heritage as a strategic asset.
- 4.3** | Champion high-quality, sustainable design to create distinctive, connected neighbourhoods.
- 4.10** | Enhance digital infrastructure to ensure residents and businesses benefit from full connectivity and technology adoption.
- 4.4** | Improve capacity in Gloucestershire's strategic road network to accommodate additional demand derived from housing and employment growth.
- 4.11** | Explore Designated Area status for Golden Valley to retain business rates and reinvest in infrastructure, skills, and growth-enabling priorities.
- 4.5** | Improve Gloucestershire's public transport and active travel networks to enhance connectivity between employment opportunities and link communities across the county.
- 4.6** | Invest in flood resilience research and mitigation to protect vulnerable areas and future-proof development.
- 4.7** | Encourage blue and green infrastructure within all new developments - integrating biodiversity, water management, and access to nature.

Local supporting strategies

- + Local Nature Recovery Strategy
- + Spatial Development Strategy
- + Local Plans
- + GCC Digital Inclusion, Infrastructure and Innovation Strategy
- + Local Transport Plan
- + Climate Leadership Gloucestershire
- + Gloucestershire Local Authorities' Economic Strategies





Mission 5

From vision to value

Innovation, investment and enterprise



From vision to value

Gloucestershire's spirit of enterprise runs deep – it's rooted in a proud industrial and agricultural heritage and reimagined through a new generation of innovators, entrepreneurs, and change makers.

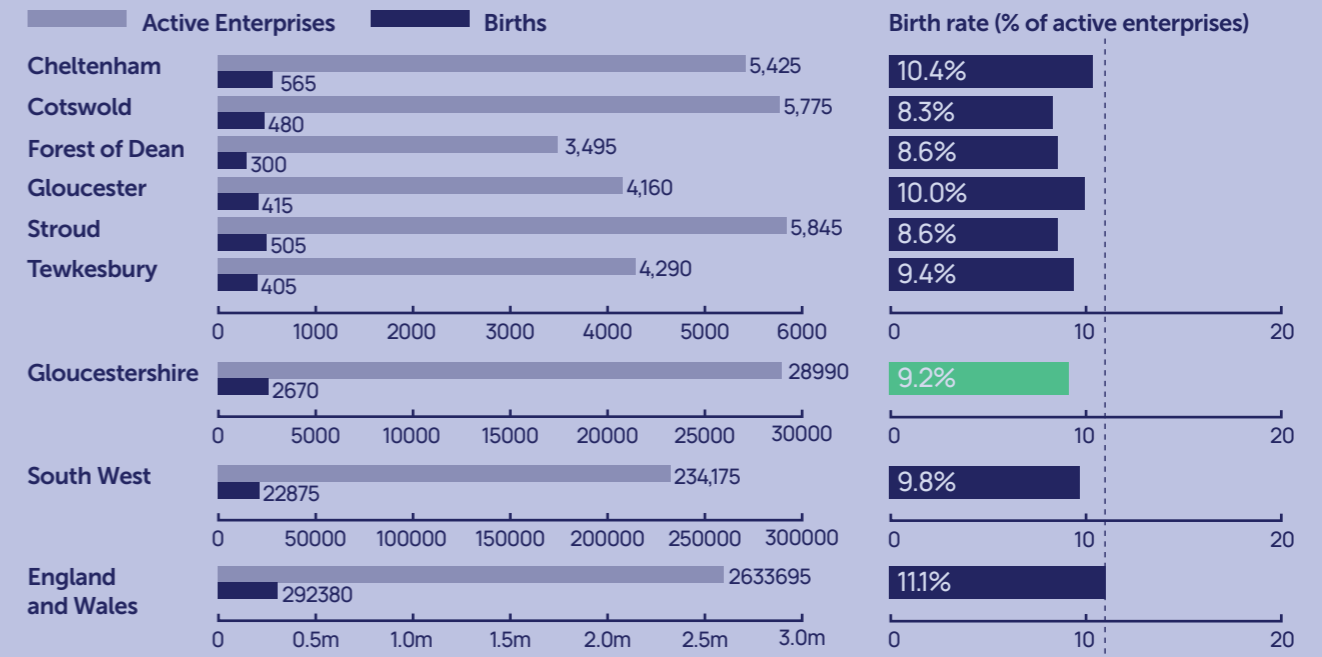
A dynamic, high-performing economy depends on the ability to innovate, attract investment, and nurture enterprise. Gloucestershire's economic future will be shaped by how effectively it empowers businesses to create, collaborate, and compete. By strengthening the county's innovation ecosystem, supporting entrepreneurs, and unlocking new sources of sustainable investment, we will ensure that Gloucestershire continues to evolve as a resilient, future-focused economy.

How we will measure our success

- 1 **Number and rate of business births** (Business Demography, ONS)
- 2 **Number and rate of business deaths** (Business Demography, ONS).
- 3 **Business survival rates – 3 years and 5 years** (Business Demography, ONS).
- 4 **Rate of high growth businesses** (Business Demography, ONS).
- 5 **GVA per hour worked** (Source: Sub regional productivity, ONS).
- 6 **Value of exports** (Source: International trade in UK nations, regions and cities, ONS).

* Additional and more specific indicators will be identified as the Plan is refined, and funding decisions are confirmed.

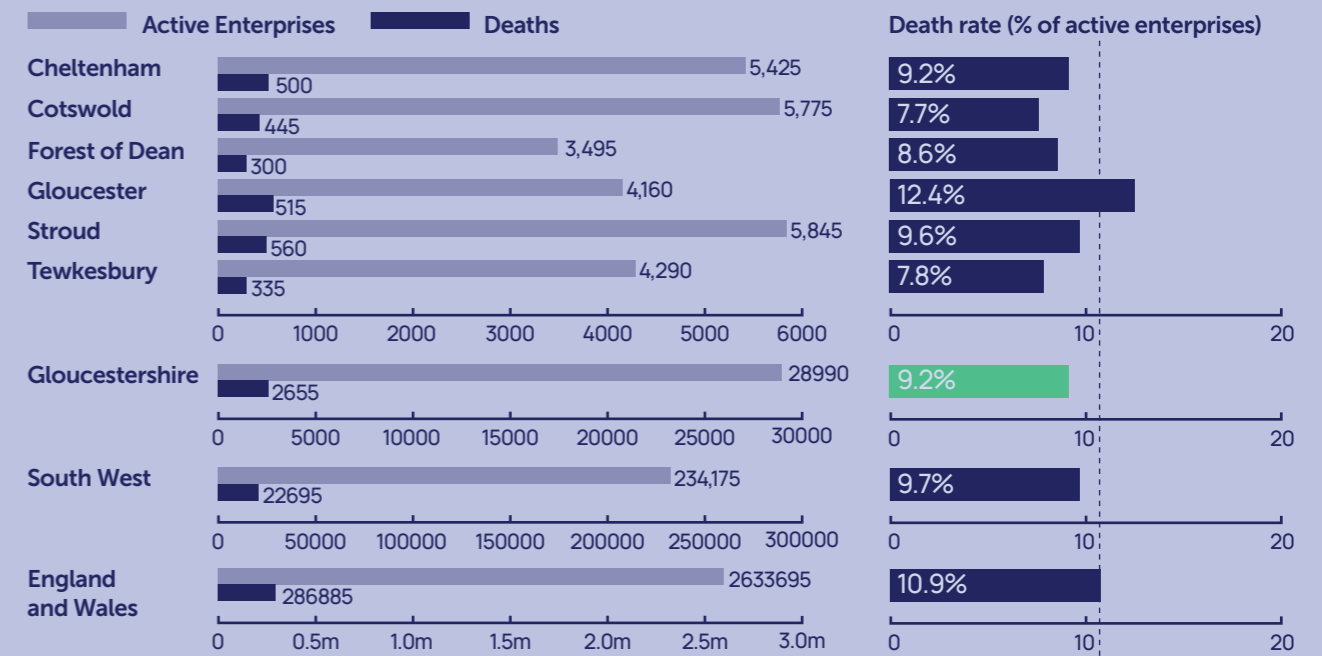
Business Birth Rates (2023)



New business registrations (identified through registration of the administrative units, that is, VAT and PAYE) are referred to as business births. Business births are expressed as a percentage of active enterprises to allow comparisons between areas of different sizes.

Business births are expressed as a percentage of active enterprises to allow comparisons between areas of different sizes.

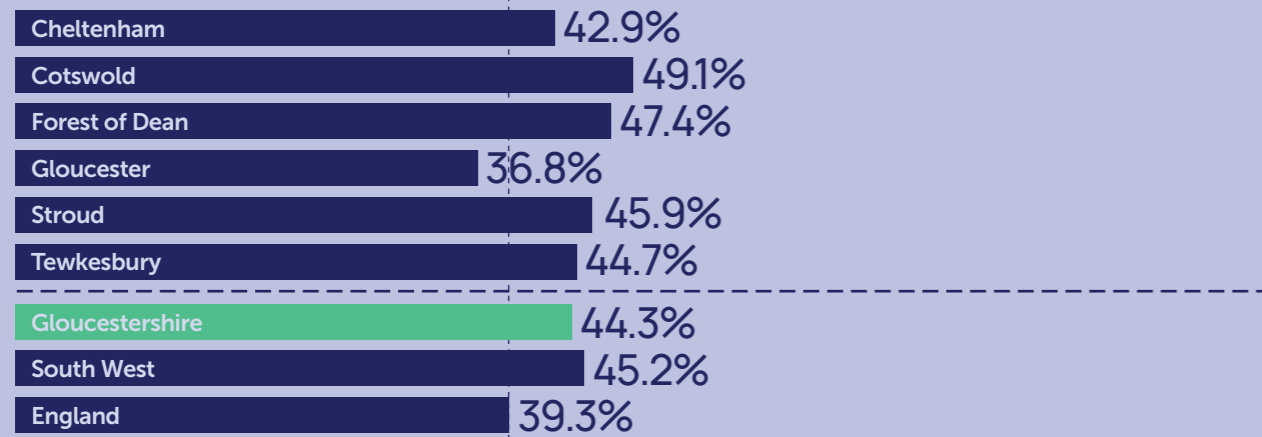
Business Death Rates (2023)



Businesses that have ceased to trade (identified through de-registration of the administrative units) are referred to as business deaths. Business deaths are expressed as a percentage of active enterprises to allow comparisons between areas of different sizes.

Business deaths are expressed as a percentage of active enterprises to allow comparisons between areas of different sizes.

Five year survival rate of businesses born in 2018 (%)



SOURCE: Business Demography, ONS

Five-year business survival rate refers to the percentage of new businesses that are still active five years after their initial establishment.

Productivity (GVA Per Hour Worked)



SOURCE: Sub regional productivity, ONS

Productivity is defined as the amount of goods and services that a worker produces in a given period of time. Gross Value Added (GVA) per hour worked is a measure of labour productivity that indicates the economic output (GVA) generated for each hour worked by a workforce. It's calculated by dividing the total Gross Value Added of an area by the total hours worked by its employed population.

Supporting business growth and innovation

Innovation is not just about technology - it is about people, ideas, and the places that bring them to life. Gloucestershire's business support ecosystem plays a vital role in enabling start-ups and scale-ups to thrive.

Through the Gloucestershire Growth Hub network over 34,000 businesses have access to tailored advice, funding, collaborative workspaces, and sector-specific business groups enabling innovation and enterprise.

Flagship developments such as The Golden Valley, The Forum, and the University City Campus are redefining the county's economic landscape, offering significant opportunities for growth.

These projects are not only magnets for investment but also the symbols of Gloucestershire's future - where innovation, education and enterprise converge.

Ensuring these are accessible through well-connected transport and digital infrastructure is essential to maximising their impact across all communities and ensuring their environmental sustainability.

Golden Valley

The Golden Valley development is designed to be a major engine of business growth in Gloucestershire, positioning Cheltenham at the heart of the UK's national cyber, digital and deep-tech economy.



The Forum

The Forum is a flagship £107 million regeneration project transforming Gloucester's city centre into a modern hub for business, digital innovation and high-growth industries.



University of Gloucestershire City Campus

The new campus is a transformational retrofit of the former Debenhams building in Kings Square, creating a modern hub for education, digital innovation and community learning in the heart of Gloucester.





Inward investment and global reach

Attracting inward investment and supporting global trade are key to the continued success of this county, and success depends on a well-skilled, adaptable, and resilient workforce ready to turn investment into innovation and opportunity.

Foreign direct investment activity is spearheaded under the Invest in Gloucestershire brand, helping to promote our assets internationally, in partnership with our local stakeholders and the UK Government's network of Embassies and Consulates throughout the world.

Targeted high growth sectors, including secure technologies, cyber and digital, and advanced engineering are key drivers of investment, whilst the county's smaller businesses form the backbone of the local economy.

Start-ups and small businesses across the county are driving innovation and local employment, yet they often face significant barriers during their early and growth stages.

This includes the need for access to affordable, flexible workspace, particularly for entrepreneurs seeking to establish roots in high-demand and accessible locations.

By continuing support for business growth services, and providing the right infrastructure in the right places, we will ensure the essential building blocks are in place to continue and grow our local economy.

As businesses scale-up, they also encounter increased risk, from managing cash flow and hiring talent to navigating new markets.

Gloucestershire is committed to attracting inward investment from companies that demonstrate strong environmental and social responsibility. We actively seek government grants and funding streams that support sustainable development and help protect the planet.

In addition, we aim to use public sector procurement reach as a force for good, prioritising contracts with businesses that uphold the highest standards of environmental stewardship and social value. By aligning investment, funding, and procurement with our sustainability goals, we can drive inclusive growth that benefits both people and the planet.



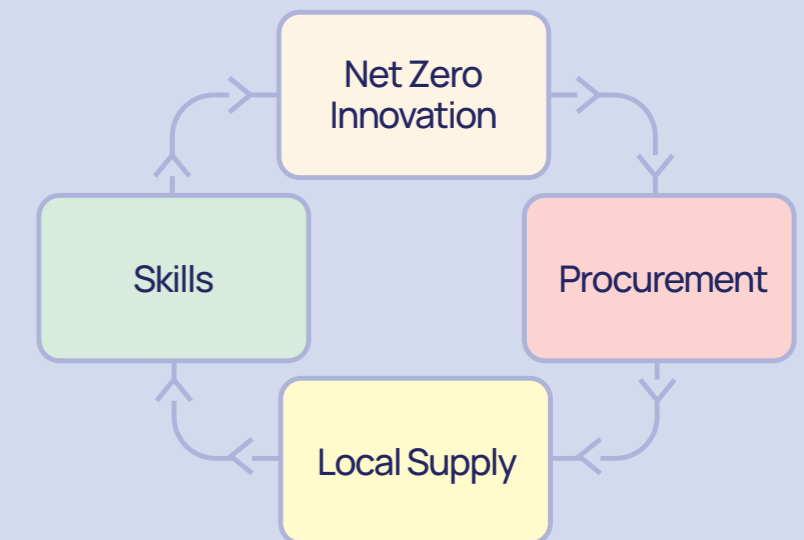
A culture of innovation and collaboration

Gloucestershire's strength lies in its ability to collaborate. The business sector groups function as engines of insight and innovation, shaping the future workforce and driving forward priority growth opportunities and areas of competitive advantage.

Our partnerships with local universities, colleges, Innovate UK, and the Catapult network are critical to accelerating innovation and technology adoption.

These relationships help businesses remain agile, competitive, and resilient in the face of change.

The county's vibrant Voluntary, Community and Social Enterprise (VCSE) network also plays a vital role delivering services, creating jobs, and driving inclusive innovation.



Recognising and integrating their contribution is essential to building a resilient, community-focused economy and sustainable economic growth.

In a time of rapid technological change, we regard ongoing

innovation as an ongoing necessity for our county.

We understand that Gloucestershire must have a thriving, innovating, digital economy to succeed in the 21st Century and beyond.

Social value and inclusive growth



Partners are committed to ensuring that investment across the county helps to deliver increased social value - working closely with industry to help strengthening local supply chains and small business contract opportunities, supporting net zero innovation, and creating opportunities for all, including apprenticeships and tackling barriers to employment.

By working together with businesses, educational institutions,

anchor organisations and communities on shared social value goals, public sector providers can harness the combined 'buying power' of Gloucestershire.

This will help us collectively to deliver more coordinated, targeted, and impactful outcomes. By strengthening local supply chains and supporting social mobility, we will ensure that economic

growth benefits all residents, particularly for those in disadvantaged communities.

By fostering a robust ecosystem that not only drives innovation and attracts investment but also champions community wealth building principles, we will ensure that economic benefits circulate and remain within Gloucestershire, strengthening local businesses and our local communities.



Delivery priorities

- 5.1 Build a thriving innovation ecosystem led by high-growth sectors - connecting local enterprise with national and regional networks.
- 5.2 Support industry-led initiatives and partnerships to unlock growth and deliver flexible, high-quality commercial workspace.
- 5.3 Unlock finance and investment opportunities for a broader range of local enterprises, including the exploration of alternative sustainable funding mechanisms (e.g. pension funds, climate bonds, declaring Designated Employment Areas) for businesses and environmental enhancement schemes.
- 5.4 Strengthen Gloucestershire's inward investment offer through the Invest in Gloucestershire brand, attracting domestic and international organisations to relocate and grow here.
- 5.5 Empower start-ups and SMEs through targeted support from the Growth Hub and sector groups - driving innovation, resilience, and job creation.
- 5.6 Embed environmental, social value and governance (ESG) principles and community wealth-building across the economy - supporting local supply chains, net zero innovation, and inclusive investment.

Local supporting strategies

- + Spatial Development Strategy
- + Local Plans
- + GCC Digital Inclusion, Infrastructure and Innovation Strategy
- + Gloucestershire Local Authorities' Economic Strategies





Gloucestershire's high growth sectors

This section of the plan recognises Gloucestershire's high growth sectors. These sectors are underpinned by critical assets, expert knowledge and industrial excellence and are where we believe Gloucestershire can lead nationally and compete globally.

While the missions outline how we will support these sectors, the following section defines who will help us grow them, and how we will work together to unlock their full potential.



Sector 1

Secure technologies and digital

Gloucestershire is a nationally significant centre for security and resilience innovation, anchored by GCHQ's headquarters in Cheltenham and its significant workforce of mathematicians, linguists, analysts and technical staff; and complemented by a dense cluster of specialist cyber-SMEs.

Gloucestershire's capabilities extend beyond cyber to include AI, quantum, climate, biosecurity, and human resilience.

These strengths connect directly into the South West's wider arc of innovation, including the Isambard-AI supercomputer in Bristol and the National Quantum Computing Centre in Oxfordshire.

Local partnerships are central to this growth. CyNam, Cheltenham's cyber network,

has expanded from 50 to over 7,000 members in just a decade, acting as a vital convener for industry, academia, and early-stage innovators.

Alongside partners like Hub8, SIDEKICK Venture Studio, Halceon, and Plexal, Gloucestershire is fostering a dynamic environment for scaling ideas and attracting investment.

The key challenge is matching this momentum with a robust, inclusive talent pipeline.

Demand in digital and security-related roles continues to outstrip supply. Golden Valley is addressing this through a coordinated approach to aptitude testing, teacher CPD, work readiness, and mid-life retraining, helping to ensure these opportunities are open to all communities, and not just those with existing specialist skills.



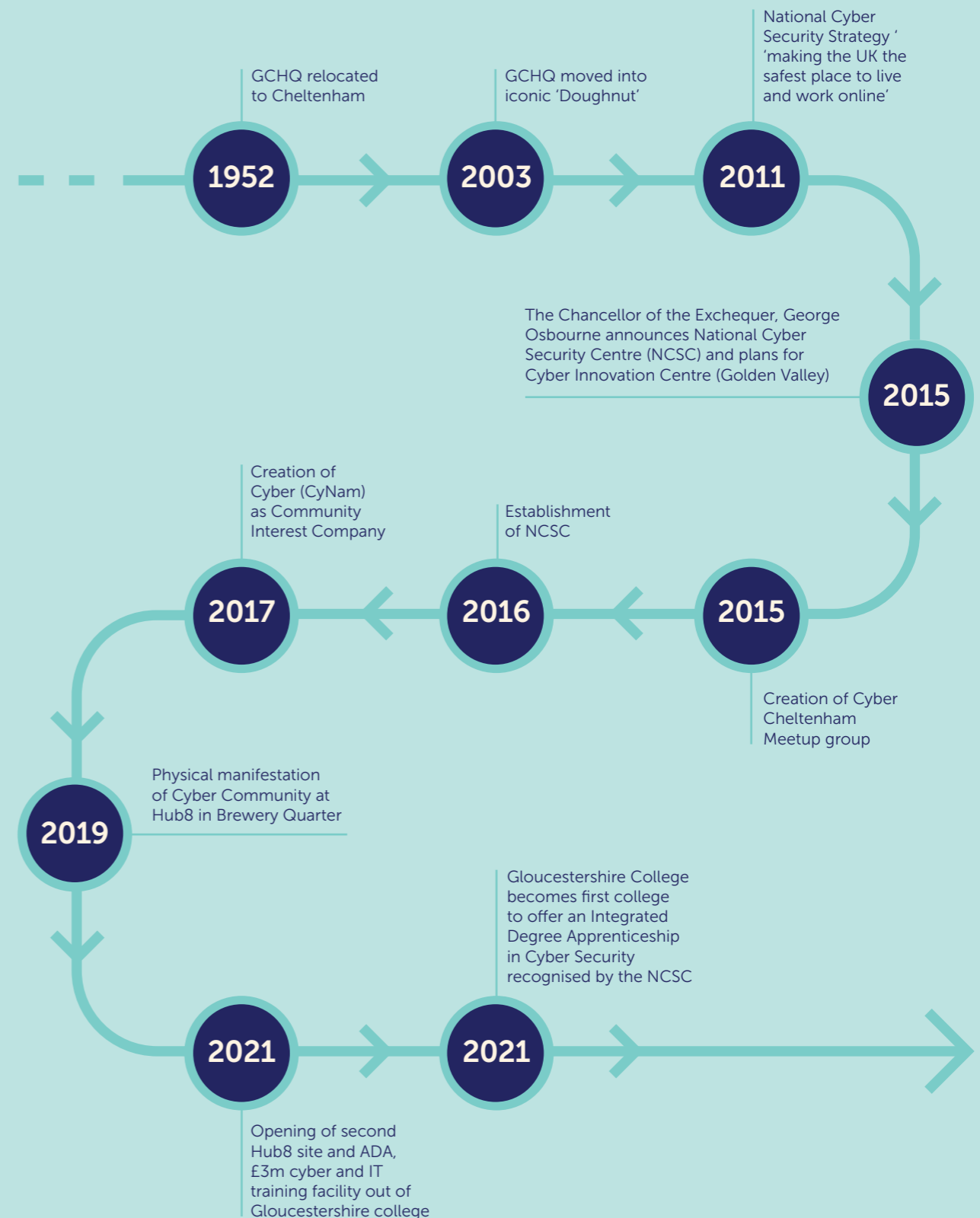
The programme spans school coding clubs, mid-career retraining, aptitude spotting, and innovative security “clearance-on-learning” pilots.

Community benefit is central. Golden Valley’s social value strategy is rooted in inclusion, education, and wellbeing, ensuring that innovation enhances local lives through investment in green space, health, and opportunity.

Looking ahead, Golden Valley embodies an emerging industrial shift, away from pure automation, and towards one that champions human-tech collaboration, sustainability, and the transformation of how people engage with emerging technologies.

Once complete, Golden Valley will be a globally recognised national asset for the UK - a secure, sustainable place where the UK’s most forward-looking organisations come together to solve tomorrow’s security challenges and build the workforce to match.

Why cyber in Gloucestershire?



Golden Valley is a £1bn employment-led technology cluster aligned with the UK’s National Science and Technology Strategy in Gloucestershire.

Positioned immediately adjacent to GCHQ in Cheltenham, the scheme will deliver over 1 million sq. ft of commercial space, 3,700 homes, and 12,000 new jobs; specialist developer HBD is leading the development, in partnership with Cheltenham Borough Council.

More than a cyber district, Golden Valley reframes security as a foundational principle for all sectors, from infrastructure and food supply to AI and national resilience.

The project is already drawing significant national and international interest, including companies choosing it as their UK base.

The flagship 160,000 sq. ft National Cyber Innovation Centre is the first building to come forward, targeting Net Zero and NABERS 5.5 Star standards.

It will co-locate startups, government, academia, and major industry in a high-trust environment, and has already attracted a significant proportion of high capability investment interest, including a major government commitment.

Golden Valley also tackles the national digital skills gap through a dedicated Skills and Talent Hub, a partnership between Gloucestershire County Council, the University of Gloucestershire, Gloucestershire College, and industry.

Golden Valley at a glance

>1 million sq. ft
commercial space

3,700
homes

12,000
new jobs

160,000 sq. ft
National Cyber Innovation Centre

Sector 2

Agri-tech

With two world-renowned agricultural universities, Hartpury University and the Royal Agricultural University, the county is a leading light for the future of agriculture, with a significant advantage in technology, cyber security and engineering and sensor technologies.

The push for technology adoption in the Agri-Tech sector has positioned Gloucestershire at the intersection of cyber and digital innovation and the evolution of advanced engineering.

Productive yield and testbed digital innovation facilities are offering real world demonstrable results and knowledge exchange for farmers.

This progress is key to ensuring the sustainability and resilience of future food systems in the face of rapid geopolitical shifts and climate change.

It also supports the shift toward regenerative agriculture, where Agri-Tech plays a key role in improving environmental outcomes and ensuring long-term sustainability.

This approach is essential for unlocking the economic potential of nature-based investment and advancing the county's broader commitment to ecological recovery.





Sector 3

Advanced engineering and aerospace

Gloucestershire has been at the heart of the national aviation and aerospace industry for over one hundred years. Britain's first turbojet engine developed by Sir Frank Whittle, and the famous aircraft the Gloster Pioneer, marked the beginning of the county's reputation for flight innovation and precision engineering.

Innovation is also supported by access to two key aviation centres: Gloucestershire Airport and Cotswold Airport. The latter is the largest privately owned aviation airport in Europe and is renowned as a centre for low carbon aerospace R&D innovation.

Industry leaders, including Safran, GE Aerospace, Dowty Propellers, Ultra, and Moog underpin the county as a global hub for aerospace and advanced manufacturing, defence and precision engineering.

With a manufacturing workforce of 33,000 (BRES, 2023) and representing over £3.5bn locally (2023), the county's contribution to defence and security to these industries with high value specialisms in aircraft maintenance, repair and overhaul and precision components, not only support the high value jobs in production and knowledge-intensive industries.



These have identified the county as a significant enabling cluster to the supporting future innovation within these associated industry developments.

A commissioned review led by Tewkesbury Borough Council in 2025 highlighted the importance of deepening engagement with the sector to further build on strategic partnerships with innovation and skills providers and expand growth premises for the sector.

It outlines the aspiration to provide a focus and increase access to cutting-edge technologies in response to local growth requirements. Work across the Catapult network, the National Composite Centre, Innovate UK, the West of England Forum, with local authorities, industry groups and academia as well as local employment and skills partners will continue to support this.

Further frontier industry growth opportunities across the county include novel materials, and robotics capabilities, and space industry manufacturing, with over 100 new jobs created in Gloucester by new investor and ultra lightweighting composites disrupter, iCOMAT.

Renishaw's global engineering design and research excellence and production expertise in precision measurement and spectroscopy, continue to advance international advancement in life sciences and medical advancement engineering, offering cutting edge technological developments to diverse industries across the world.

Further innovations include the world's first underwater living research project with the DEEP campus, a £100m+

marine engineering and academic collaborative investment at Tidenham in the Forest of Dean.

The goal to increase understanding and preservation of the planet's deep-water environments, with the aim of humans being able to live, explore and understand the oceans whilst living underwater.

Highly specialised clusters of Advanced Engineering and Manufacturing major and high growth industries exist across the county, with Tewkesbury borough, a particularly pivotal location for innovation, advanced manufacturing and defence. The sector alone represents over 33% of Tewkesbury borough's GVA.

Gloucestershire is highly aligned and recognised within the frontier industries within the Modern Industrial Strategy Sector Plans, and Defence Industrial Strategy.

iCOMAT at a glance

>100
new jobs created

Tewkesbury

>33%
Tewkesbury Borough GVA

The strength of Advanced Engineering and Manufacturing (AEM) in Gloucestershire



£3.5bn
per annum estimated GVA

£96,491
GVA per full time employee



3,196 AEM businesses
433 have high growth potential



34,500 AEM jobs across Gloucestershire



Contributes up to 50% of GVA in Tewkesbury and Stroud districts

Gloucestershire sub-sector specialisms



Aerospace



Defence



Precision engineering



Metal products



Medical devices

Energy transition and low carbon innovation

As the UK energy market continues to transition to Net Zero, Gloucestershire is superbly positioned to build on our leading commitments to Climate Change and the Environment, Social and Governance (ESG) agenda for business and industries, enhanced by its existing strengths in renewable innovation and a strong commitment to grassroots neighbourhood and community-led initiatives, across the broader spectrum of domestic retrofit, SME energy efficiency investment and measures, through to the decarbonisation of larger industries and energy generation.

The broader energy transition is also impacting on the way in which grid connections support

local housing markets and strategic and local planning delivery.

Local Area Energy Planning (LAEP) forms part of the new regional and energy strategic planning discussions.

Gloucestershire is working proactively to engage with the grid and distribution network/system operators to address and respond to emerging strategic planning and infrastructure, economic and climate change objectives in response to the Government's Clean Power Plan 2030 and ensure strategic investment into Gloucestershire's energy grid.

Next steps in this journey will also focus on local energy stakeholder engagement and appropriate data gathering to enable an investment prospectus to support our strategic objectives under Climate Leadership Gloucestershire.





Gloucestershire is also at the forefront of the emerging green hydrogen ecosystem, with local industry pioneers such as Progressive Energy, Kiwa Energy, and ZeroAvia shaping impactful hydrogen energy projects.

Wild Hydrogen, a green tech start-up, is actively researching and developing carbon-negative hydrogen from biogenic materials and captured carbon dioxide for hard-to-abate sectors like construction, steel production, shipping, and farming, showcasing the county's leadership in cutting-edge green technologies.

We will build on existing links and forge new relationships between industry, the public sector, education and communities to showcase learning and innovation at all stages of the energy transition, within the growth of the circular economy, both domestically and for industry, and in the renewables journey.

Our commitment and drive towards net zero, while advocating key principles for a regenerative, environmentally aware and circular economy approach will act as a 'golden thread', for all industries including those in our high productivity sectors.

This will ensure we balance the strategic need for prosperity and productivity to support our local communities with well paid jobs and with the pressures and need for balance with our highly valued environment and natural assets and capital.

People, planet and profit are not mutually exclusive and many of our businesses and new investors are already on significant journeys investing in energy efficiency and greenhouse gas emission reductions from micros and SMEs to the largest foreign direct investors as they respond to consumer behaviours, energy prices and global investment capital requirements.

Gloucestershire's Growth Hub plays a vital role in helping us to achieve environmentally friendly productivity gains, energy resource efficiency and social value in response to significant

levels of demand for advice and guidance.

Sustainable energy supply experts and advocates, such as Ecotricity, actively demonstrate applied innovation and sustainable financial investments, including the development of the world's first eco-stadium, Forest Green Rovers.

The planned eco-stadium will showcase how sport can drive environmental change. The club is a beacon of Gloucestershire's low-carbon leadership and community engagement, proving that sustainability and ambition go hand in hand.

The Berkeley Green nuclear science and clean energy hub



Berkeley Green's ambition is to become a nuclear science and clean energy hub attracting leading UK and global enterprises. It will provide an 'ecosystem' of education, training, R&D and commercial production on the one site.

A major component of the market proposition will be isotope R&D and production using latest nuclear fusion and fission technology - including for the medical sectors.

The plan is for the scheme to be anchored by further education, and research and development

operations operating out of new, bespoke buildings.

The Berkeley Green University Technical College – already on site – will play a significant role in this education function.

Our ambition is to attract more people to study in Gloucestershire and encourage them to build their futures here.

Initially the scheme will fully utilise three shielded facilities that are

especially attractive to nuclear science occupiers given the cost of building these from scratch.

Change to An outline planning application is being considered for 600,000 sq ft of development ensuring maximum flexibility to respond to market needs and changes in these sectors (submitted August 2025).

Berkeley Green at a glance

600,000 sq ft
of proposed development





Gloucestershire's economic ecosystem

Gloucestershire's uniquely diverse and interconnected economic ecosystem brings together a breadth of high-value sectors that collectively build long-term resilience for the region.

From advanced engineering, aerospace, secure technologies and digital innovation to agri-tech, energy transition, nature recovery and the everyday economy, the county's strengths span cutting-edge research, sustainable industries and essential community foundations.

This holistic picture highlights Gloucestershire's capacity to adapt, innovate and thrive - drawing on skills, infrastructure, natural assets and emerging technologies to support a robust, future-ready economy that benefits all parts of the county.

Future→ Gloucestershire



Front cover image: Harris Stovell

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