



KEYNOTE

**AHMED GOGA, DIRECTOR,
GREAT SOUTH WEST PARTNERSHIP**

Great South West



The Great South West Delivering The UK's Future Security

Ahmed Goga, Director, Great South West
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About Us

Great South West is dedicated to driving investment into the region and promoting its world-class businesses, technologies and workforce on the national and global stage.

Covering Somerset, Devon, Cornwall and Dorset our economy is worth over £81 billion and rich in diverse industries such as marine, photonics, manufacturing and agritech.

The region is pivotal to the UK's economic security and growth.



ISLES OF SCILLY

Great South West



INDEPENDENT ECONOMIC REVIEW

SECURING
THE UK'S
ECONOMIC
FUTURE

NOVEMBER 2024

Great South West



Why The Great South West Matters To UK Security

- One of highest concentrations of advanced manufacturing anywhere in the UK
- The UK's defence spine and home to Europe's largest naval base and key strategic assets
- Critical to UK food supply and climate resilience accounting for a third of farm and dairy output
- Most diverse range of renewables with potential to deliver up to 15% of the UK's future clean energy
- Highest concentration of critical minerals in Europe which are central to energy transition
- National strategic technology capabilities in marine autonomy, photonics, semiconductors, satellites and createch

The Great South West region is...

Home to
134,000
businesses



Unlocking an additional
£45bn
through the green & blue revolution



An economy worth
£81bn



Exporting
£12.75bn
of goods & services



1.5%
Annual
Manufacturing
employment
growth

120,000
Employed in
Manufacturing

£7.4 billion
Manufacturing
GVA

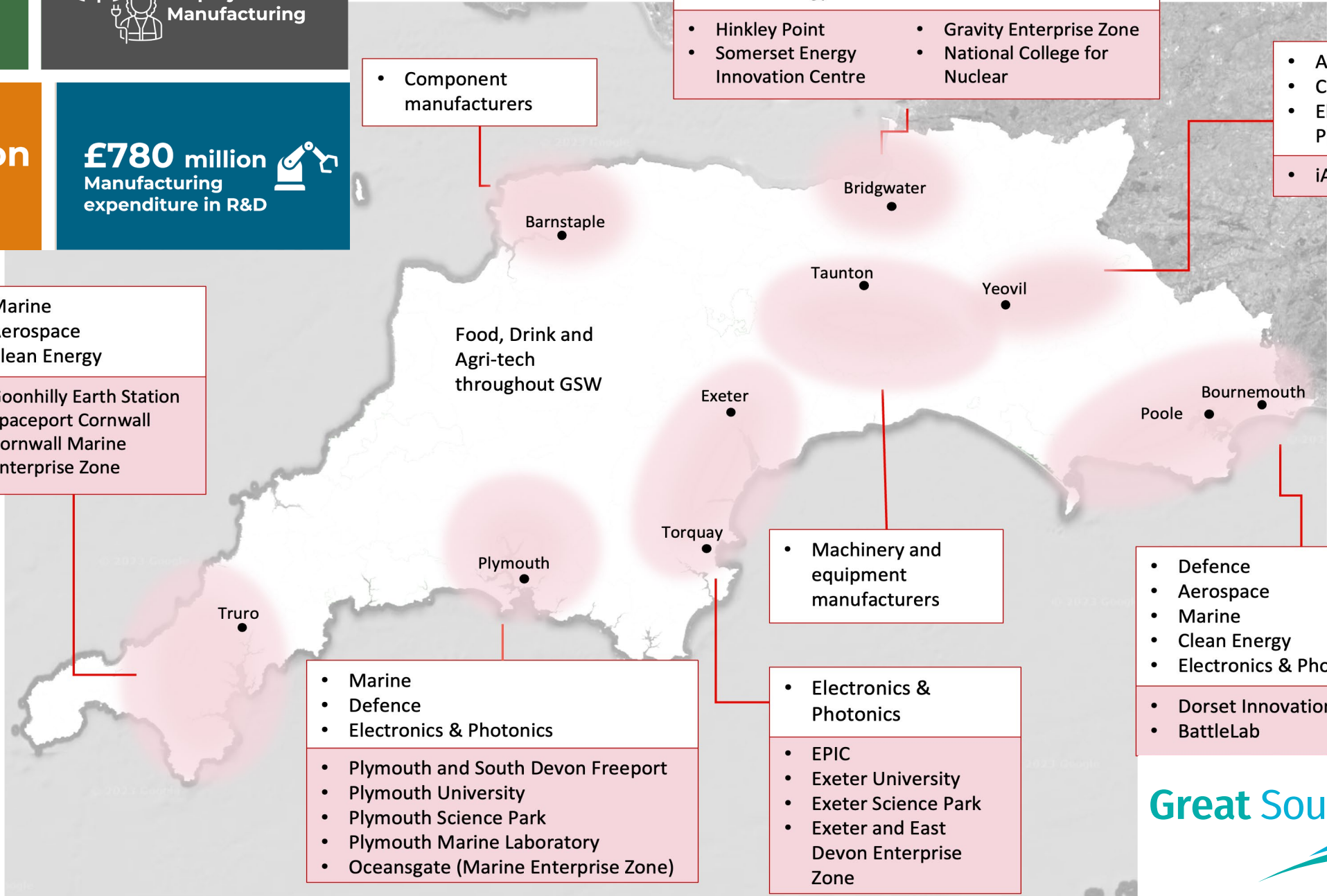
£780 million
Manufacturing
expenditure in R&D

- Marine
 - Aerospace
 - Clean Energy
- Goonhilly Earth Station
 - Spaceport Cornwall
 - Cornwall Marine Enterprise Zone

- Component manufacturers

- Clean energy
- Hinkley Point
- Somerset Energy Innovation Centre
- Gravity Enterprise Zone
- National College for Nuclear

- Aerospace
 - Clean Energy
 - Electronics & Photonics
- iAero



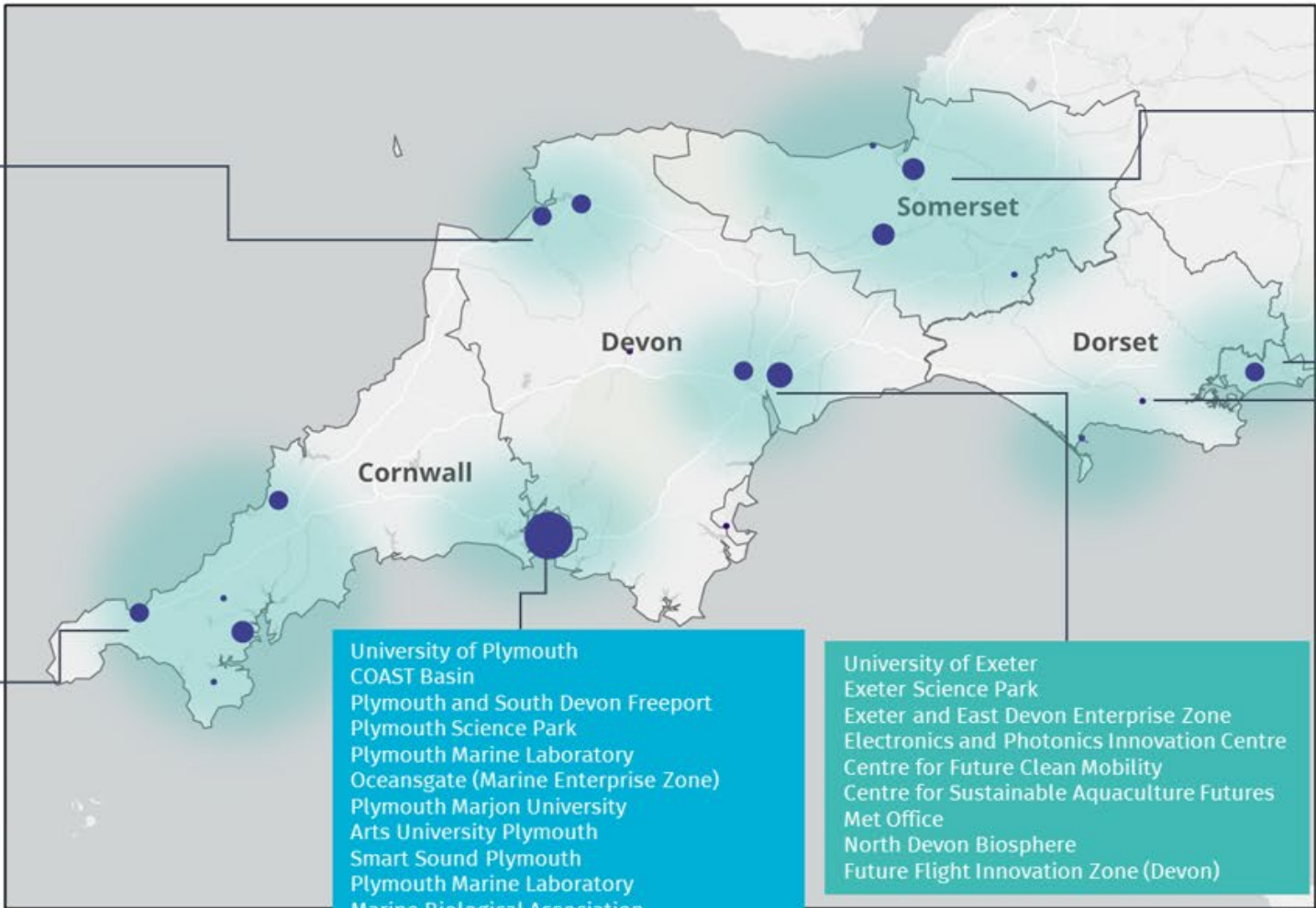
- Marine
 - Defence
 - Electronics & Photonics
- Plymouth and South Devon Freeport
 - Plymouth University
 - Plymouth Science Park
 - Plymouth Marine Laboratory
 - Oceansgate (Marine Enterprise Zone)

- Machinery and equipment manufacturers

- Electronics & Photonics
- EPIC
- Exeter University
- Exeter Science Park
- Exeter and East Devon Enterprise Zone

- Defence
 - Aerospace
 - Marine
 - Clean Energy
 - Electronics & Photonics
- Dorset Innovation Park
 - BattleLab

The Great South West Innovation Landscape



Appledore Shipbuilders
 Appledore Clean Maritime
 Innovation Centre
 Node Innovation Centre

Gravity
 Somerset Energy Innovation Centre
 Hinkley Point C
 Firepool Centre for Digital Innovation
 UK Hydrographic Centre
 iAero Centre
 Future Flight Innovation Zone (Somerset)
 Agri-EPI

Bournemouth University
 BU Orthopaedic Research Institute
 BU National Research Centre for
 Computer Animation
 BU The Centre for Excellence in Media
 Practice
 Arts University Bournemouth
 Innovation Centre
 Health Sciences University

Goonhilly Earth Station
 Spaceport Cornwall
 Cornwall Marine Enterprise Zone
 Hayle Marine Renewables Business Park
 The National Drone Hub
 Falmouth University
 Falmouth Launchpad
 University of Exeter Cornwall
 European Centre for Environment and
 Human Health
 Camborne School of Mines

University of Plymouth
 COAST Basin
 Plymouth and South Devon Freeport
 Plymouth Science Park
 Plymouth Marine Laboratory
 Oceansgate (Marine Enterprise Zone)
 Plymouth Marjon University
 Arts University Plymouth
 Smart Sound Plymouth
 Plymouth Marine Laboratory
 Marine Biological Association
 Cyber-SHIP Lab
 National Centre for Coastal Autonomy
 Smart Sound

University of Exeter
 Exeter Science Park
 Exeter and East Devon Enterprise Zone
 Electronics and Photonics Innovation Centre
 Centre for Future Clean Mobility
 Centre for Sustainable Aquaculture Futures
 Met Office
 North Devon Biosphere
 Future Flight Innovation Zone (Devon)

Centre for Environment, Fisheries and
 Aquaculture Science
 Dorset Innovation Park
 Agri-Tech Innovation Centre
 Defence Battle lab
 SouthWest Cyber Security Cluster

Nationally Critical Investment Into The South West

- Golden Valley Cyber
- Severn Edge SMR
- Bristol Brunel AI
- Severn Tidal Power
- Aerospace Cluster
- Hinkley Point
- Gravity Campus
- Celtic Sea & FLOW
- Strategic Defence Review
- Critical Minerals Acceleration

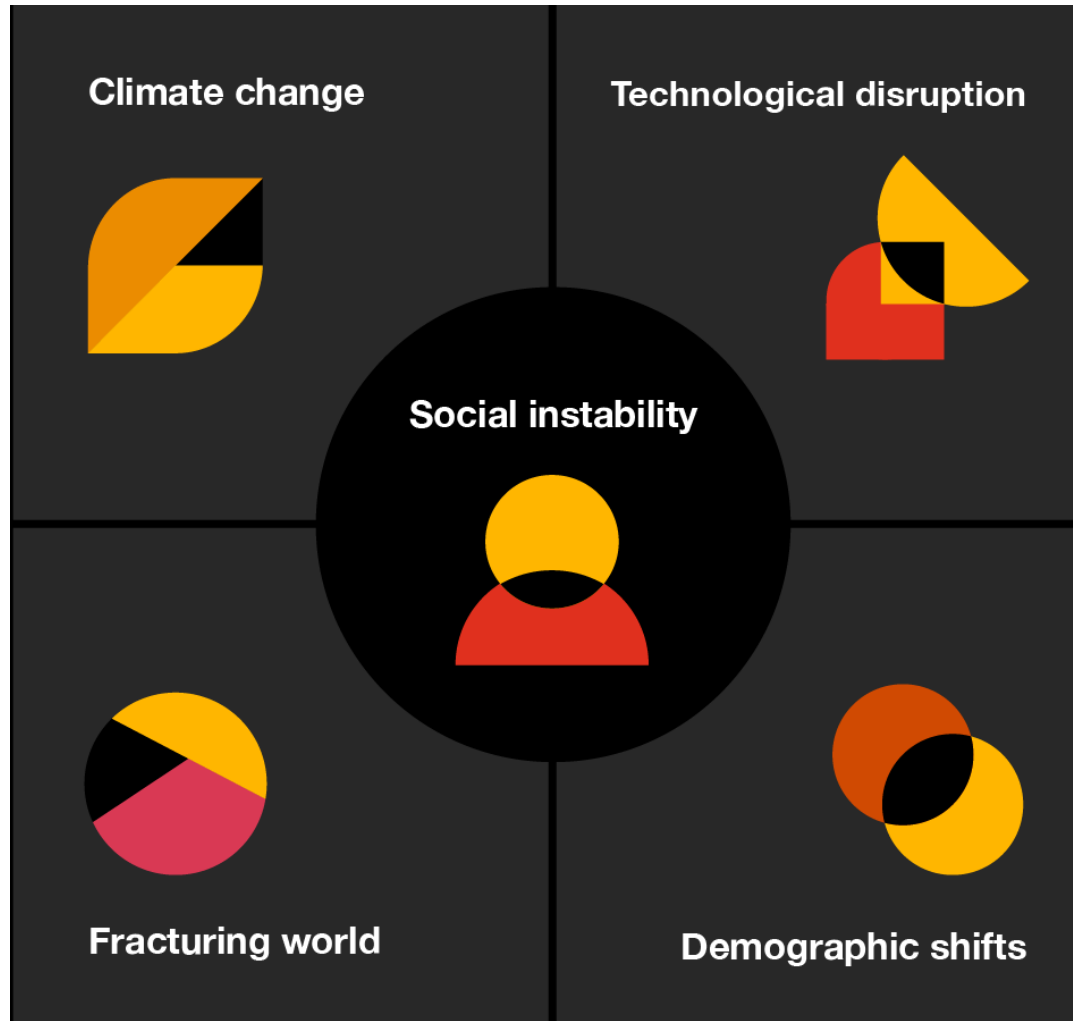
The map shows the following counties and their associated project locations:

- Gloucestershire** (teal): Gloucester, Swindon
- Wiltshire** (purple): Trowbridge
- Somerset** (light green): Taunton
- Dorset** (tan): Dorchester, Bournemouth
- Devon** (yellow): Exeter, Torbay
- Cornwall** (blue): Truro, Plymouth

Other locations marked include Bristol and Bournemouth. The map is surrounded by several images illustrating key projects:

- Rolls-Royce** jet engine component.
- AGRATAS** building in Bristol.
- Severn Tidal Power** turbine.
- Hinkley Point** nuclear power station.
- Celtic Sea & FLOW** offshore wind turbine.
- AUKUS** submarine with flags of Australia, UK, and USA.
- Strategic Defence Review** construction site.
- Golden Valley Cyber** data center.

Why National Security Is An Economic Issue



- Two decades of lost growth
- Impact of A,B,C,D,E
- Economies are reassessing their resilience in the face of Global Megatrends
- Technology now seen as a vital part of national security

Source: PWC, Megatrends 2024





What is At Stake For Science Parks and Innovation Districts?

- Being at the vanguard of national economic resilience as vital hubs for strategic UK assets
- Building a new relationship with private investors and businesses with the potential to accelerate investment into nationally critical segments or technologies
- Testing resilience and risk readiness of onsite infrastructure to ensure science parks can host and function key facilities at scale
- Rethinking global partnerships ensuring that they are consistent with national security objectives and priorities



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#backthegreatsouthwest

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