

Celebrating our Innovation Region

Enterprise M3 LEP
Annual Conference 2023

enterprise **m3**
Delivering prosperity through innovation



Agenda

- 09.00** Registration and refreshments
- 10.00** Introduction
- 10.10** EM3 Impact Report
- 10.20** Panel: Driving Innovation in High Growth Sectors
- 11.05** Keynote: Our Cultural GDP
- 11.40** Q&A: EM3 Board Members
- 12.25** Conference Close
- 12.30** Lunch and networking

The background is a dark teal gradient with abstract shapes: a yellow ring at the top, an orange ring on the left, and another orange ring on the right. There are also two light blue pill-shaped bars at the top right and two at the bottom left. Two stylized logos, each composed of four overlapping circles in orange, blue, and yellow, are positioned on the left and right sides.

Introduction

Michael Queen

Chair, Enterprise M3

Housekeeping

- **No planned fire alarm**
- **Please turn phones to silent**
- **We will be using Slido during this event**

- Scan this QR code
- Or visit **Slido.com** and use **#EM3Conf23**





EM3 Impact report

Stephen Martin

Managing Director, Enterprise M3



Driving Innovation in High Growth Sectors



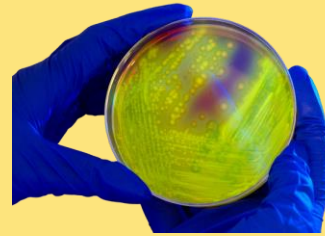
Nurturing a Jet Zero cluster for a decarbonised aerospace industry.



Promoting the next phase of video gaming and immersive technology.



A thriving animal health sector.



Understanding our life sciences sector.



World leading space and satellite industry.





Supporting Business Growth



4,300

businesses benefitted
from EM3 Growth
Hub services in 2022-
23

enterprise **m3**
GROWTHHUB
LET'S TALK GROWTH

"We were looking for expert guidance to help us navigate the challenges of our rapid expansion. The service has clearly delivered and has been instrumental in providing valuable support and resources to help us achieve our goals."

PJ Farr, UK Connect



"The support we received gave us confidence to shape our sustainability plans, so we could focus on improvements that would achieve maximum benefit to our business and improve our energy efficiencies."

Jo Holtom, Kerbur
Garden Material





Providing Financial Support for Growth

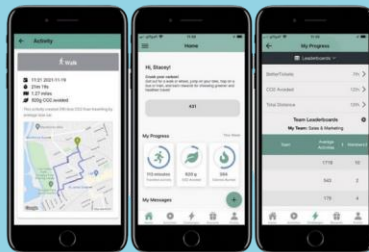


£15.32m

lent or invested to date via the Enterprise M3 Funding Escalator supporting 106 businesses

£3.11m lent or invested in 2022-23, benefitting 13 businesses and creating/safeguarding 88 jobs

BetterPoints secured £150,000 to support the launch of its Carbon Crush platform.



Fox Robotics helps improve efficiency and automation for soft fruit farms and received funding to help extend its research and development function.



Jellyfish Livewire produces the environmentally friendly Green Gift Card and received a £150,000 EM3 Expansion Loan to create new jobs and grow.





Driving High Quality Careers Education

90

Schools Supported



90,000

Learners Helped



70

Business Volunteers



150

Employers Engaged



Enterprise M3
CAREERS HUB

THE CAREERS &
ENTERPRISE
COMPANY



Developing Talent and Green Skills

Reshaping Green Technical Skills



Collaborating with 8 FE Colleges to deliver the £2.6m Strategic Development Fund (SDF) project.

Over 100 hours of green skills learning materials developed and £1.4m of new equipment and technology purchased.

Shaping Local Talent

Heathrow
Making every journey better

MORGAN
SINDALL

UK SPACE
AGENCY



HAYS

AIRBUS

The EM3 Skills Advisory Panel (SAP) brought together employers, skills providers and key local stakeholders to better understand and resolve mismatches in skills.

Supporting Apprenticeships in our Region

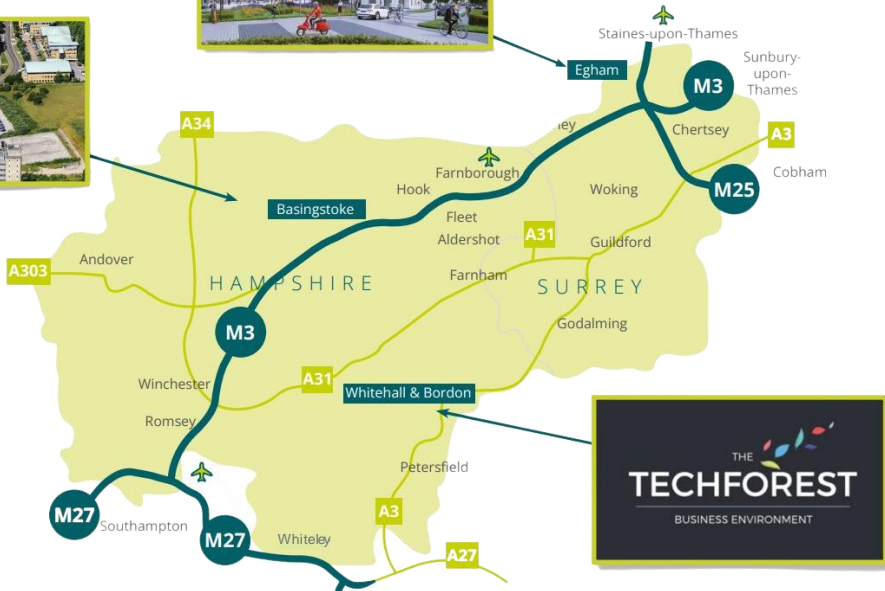


The EM3 Apprenticeships and Skills Hub has supported 202 employers to understand their talent needs and implement apprenticeships to plug skills gaps.



Promoting our Region to the World

Driving the EZ³
Enterprise Zone



18

direct foreign
investments
creating 608
jobs in 2022-23.



EM3 Jewels in the Crown
campaign to showcase EM3's
outstanding assets.



Video to go here



Panel

To ask a question, scan here or visit
Slido.com and use **#EM3conf23**:



Driving Innovation in High Growth Sectors

Ross McNally (Panel chair),
Hampshire Chamber of Commerce

Simon Robinson,
Hattingley Valley Wines

Andrew Greenhalgh,
Surrey Satellite Technology Ltd

Kam Pooni,
Glyconics Ltd

Ayantika Mitra,
TISICS Metal Composites





Panel

Ayantika Mitra

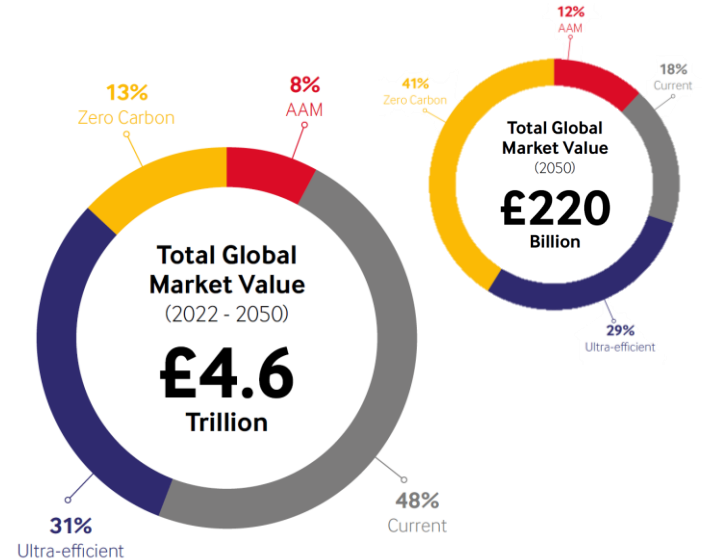
Business Strategy Director, TISICS Metal Composites



Aerospace Net Zero Opportunity



- **UK** forecast to capture **18% global market share** to 2050 (up from 13% 2022)
- Majority growth driven by **ultra-efficient** and **zero emission** segments.
- EM3 region well positioned to capture growth markets.



SOURCE: ATI Funding Growth in Aerospace 2022
<https://www.ati.org.uk/wp-content/uploads/2022/11/ati-funding-growth-in-aerospace.pdf>

18,000
JOBS HAMPSHIRE

> £1.5 Bn
TURNOVER

£101 K
OUTPUT/JOB

TISICS: Driving Innovation in Aerospace

TISICS
Metal Composites



SUCCESSFUL 625 TONNES TEST,
JANUARY 2023

World's Largest Metal Composite Component for Civil Aircraft

SUPPORTED BY  UK Research and Innovation  SAFRAN

IMPACT



9 million Tonnes/yr
CO₂ emissions saving



50%
MASS REDUCTION

APPLICATIONS



LANDING GEAR



WING



ENGINE



HYDROGEN STORAGE

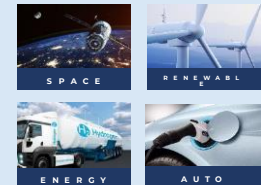


FUTURE AIRCRAFT



BILLION £ MARKET THOURGH:

- UK IP
- UK supply chain
- UK products
- UK jobs
- International sales



Unlocking Growth and Global Leadership

EM3 region in prime position to capture growth opportunity for the UK

 **STRATEGIC TECH**
Identified by UK
Gov. NSI Act 2021



INDUSTRIAL LEADERSHIP



Leverson HELM



QinetiQ



TISICS
Metal Composites

GLOBALLY RECOGNISED BRAND



PIONEERING AIR TRANSPORT



RESEARCH, SKILLS & SUPPORT



fac



INVEST IN SKILLS

EMBRACE STRENGTHS

FOSTER COLLABORATION



Panel

Simon Robinson

Founder and Owner, Hattingley Valley Wines



**HATTINGLEY
VALLEY**



HATTINGLEY VALLEY

- Hattingley Valley – about us
 - Sparkling wine producer based in Hampshire
- Traditional method using Chardonnay, Pinot Noir and Pinot Meunier
- Founded in 2008, now a leading UK producer
 - Production capacity of 500k bottles





HATTINGLEY VALLEY

- Hattingley Valley – the context
 - UK wine industry since 1990
- Emerged as a high-quality producer
 - Rapid growth 2015-now
 - Overseas interest





HATTINGLEY VALLEY

- Hattingley Valley – the future
 - Continued growth
- Rural jobs and development
 - UK sales and Exports
 - Tourism potential





Panel

Kam Pooni

CEO, Glyconics LTD

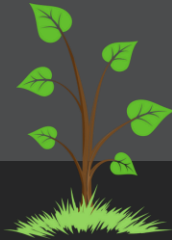


From Ideation To Scale...



IDEA

Five Universities. NHS trusts ICS, NIHR Applied Research Collaboration, National Biofilms, NCA, NOC, Photonic Labs



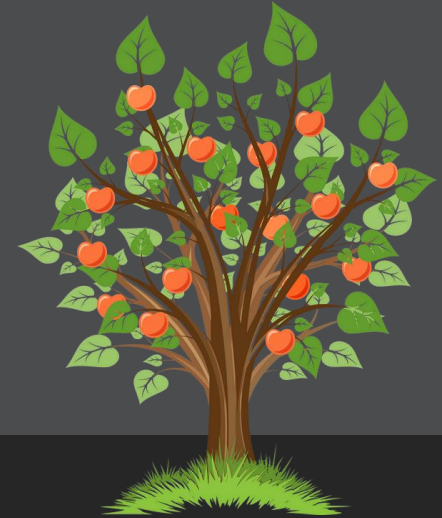
EVALUATION

ICS (trials), NIHR Research Design, Clinical trials units (Southampton, Portsmouth) Biomed Research centers, Emerging Therap./Tech, Wessex Invest Sciences Hub



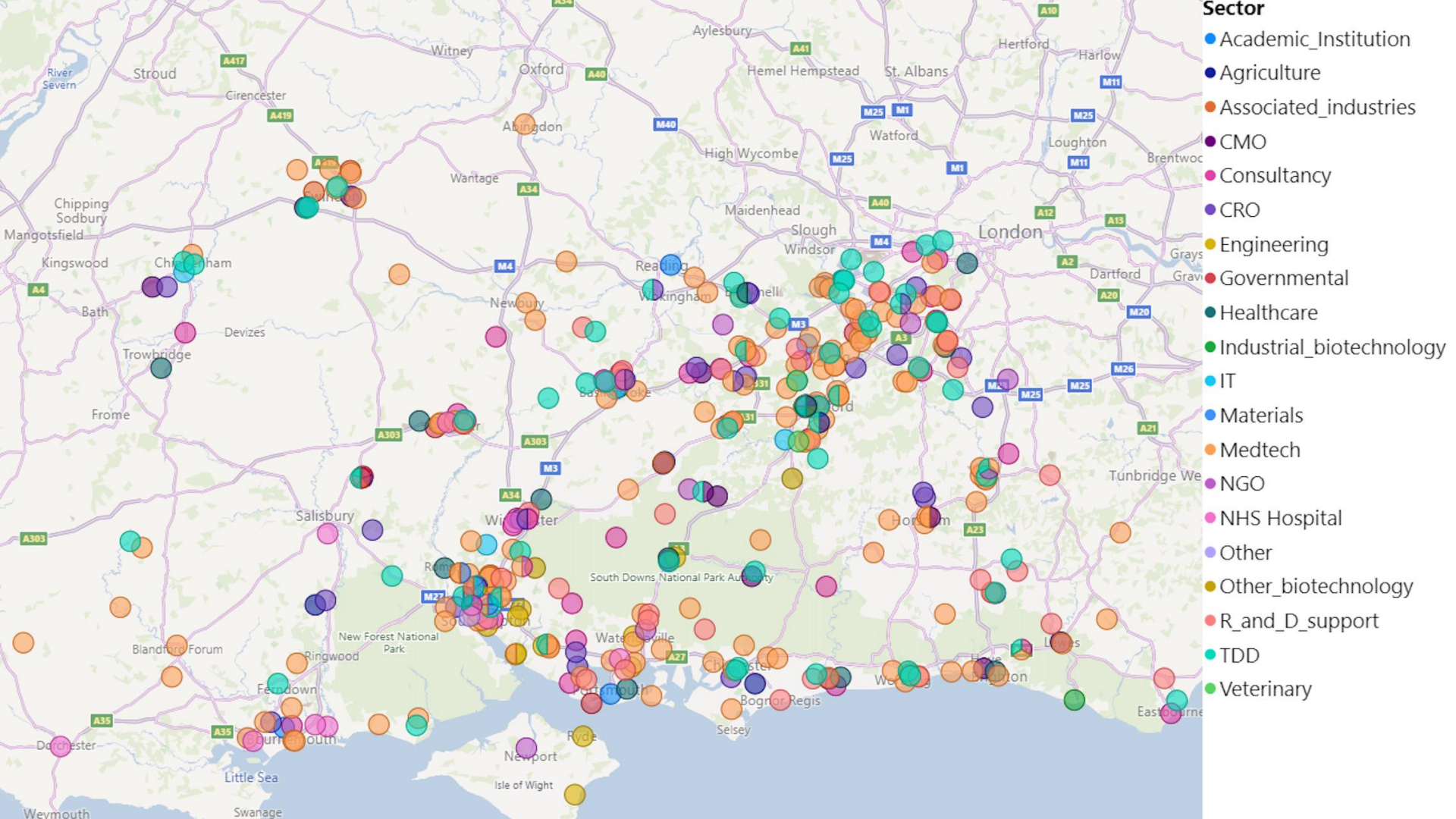
INNOVATION

Dorset innovation Hub, SETsquared, Future Worlds, Solent freeport, Innovation Parks
Wessex Health Partners



ADOPTION & SCALE

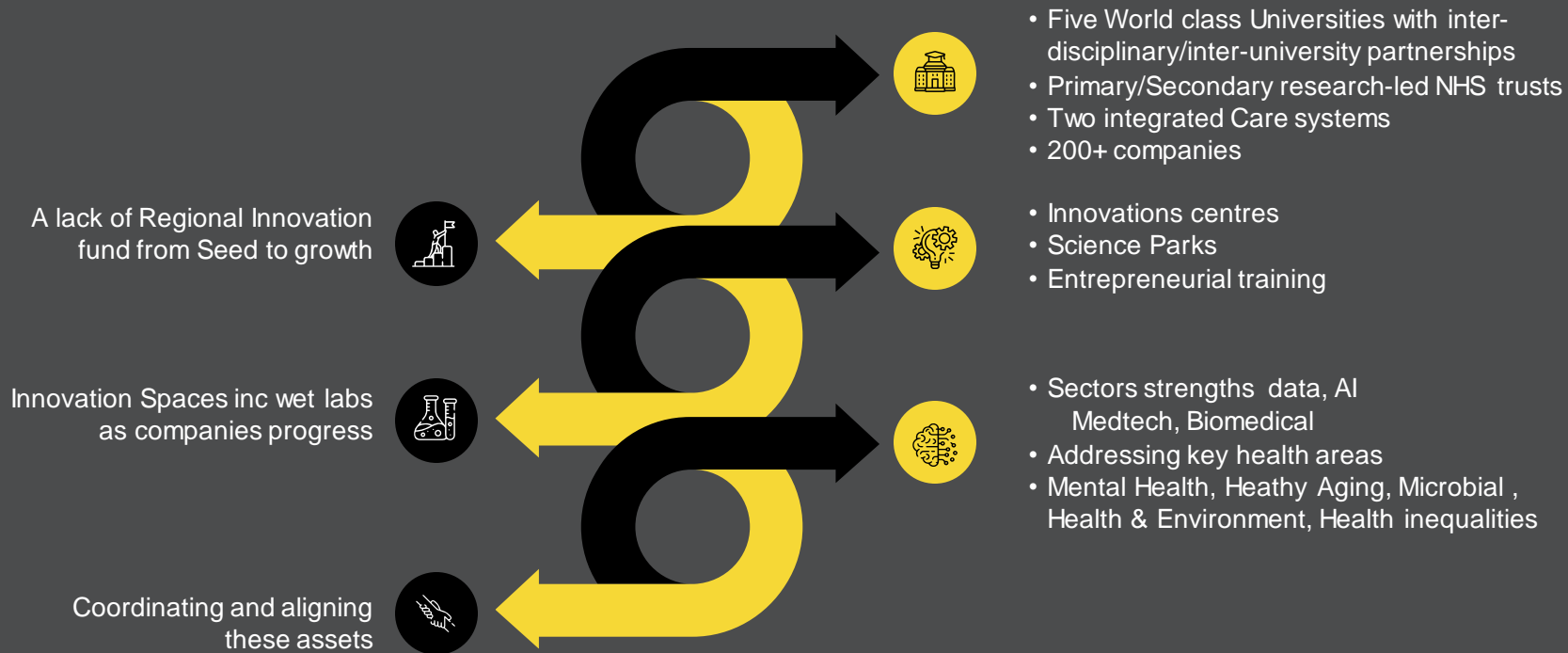
Southampton Science park Catalyst, Wessex Academic Health Science Network, SIGHT, NIHR Clinical Research Network



Sector

- Academic_Institution
- Agriculture
- Associated_industries
- CMO
- Consultancy
- CRO
- Engineering
- Governmental
- Healthcare
- Industrial_biotechnology
- IT
- Materials
- Medtech
- NGO
- NHS Hospital
- Other
- Other_biotechnology
- R_and_D_support
- TDD
- Veterinary

So, What Is Holding Us Back?





Panel

Andrew Greenhalgh

Head of Marketing, Surrey Satellite
Technology Limited

Surrey Satellite Technology Ltd

“The Original New Space Renegade”

Space mission prime | Small satellites and constellations | Manufacturer and operator | On-the-job training.
Supplier to governments and commercial operators



Established in 1985

Based in the United Kingdom with space mission partners worldwide

An Airbus Defence and Space company

Surrey Satellite Technology Ltd



Surrey Satellite Technology Ltd





Panel

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Keynote Speaker

Bernard Donoghue OBE

Our Cultural GDP - How a region's arts and cultural strengths stimulate its economy



- **Chair, National Trust London and South East Advisory Board**
- **Mayor of London's Cultural Tourism Ambassador, Cultural Leadership Board**
- **Co-Chair, London Tourism Recovery Board**
- **Co-Chair, VisitLondon**
- **Chair, Bristol Old Vic Theatre**
- **Chair, People's History Museum**



National
Trust

MAYOR OF LONDON



**BRISTOL
OLD VIC**



- **Member, UK Government's Tourism Industry Council**
- **Former Chair, VisitManchester**
- **Co-Chair, VisitLondon**

V&A

THE BRITISH MUSEUM

HORNIMAN MUSEUM & GARDENS

BLETCHLEY PARK



BRITISH LIBRARY

National Portrait Gallery

IWM IMPERIAL WAR MUSEUMS

NATURAL HISTORY MUSEUM

NATIONAL GALLERIES SCOTLAND

RA Royal Academy of Arts

National Museums Liverpool

TATE

SCIENCE MUSEUM

THE NATIONAL GALLERY



ROYAL MUSEUMS GREENWICH

National Museums Liverpool

Glasgow museums

national museum wales
cymru



the DESIGN MUSEUM

ROYAL AIR FORCE museum

london transport museum



Birmingham Museums

Nat Mus Scot

National Museums Northern Ireland

THE COURTAULD Gallery

AT SOMERSET HOUSE



UNIVERSITY OF CAMBRIDGE MUSEUMS & BOTANIC GARDEN



National Trust



ENGLISH HERITAGE



HOUSES OF PARLIAMENT



HISTORIC SCOTLAND
ALBA AOSMHOR



YORK MINSTER



TITANIC BELFAST.



TOWER BRIDGE EXHIBITION



THE CHURCH CONSERVATION TRUST



CITY OF LONDON



DURHAM CATHEDRAL

THE SHRINE OF ST CUTHBERT



the National Trust for Scotland
a place for everyone



Historic Royal Palaces



ROYAL COLLECTION TRUST



Salisbury Cathedral



OLD ROYAL NAVAL COLLEGE GREENWICH



St PAUL'S CATHEDRAL



THE ROMAN BATHS BATH



TREASURE HOUSES OF ENGLAND



WESTMINSTER ABBEY
Founded 960



Canal & River Trust
keeping people, nature & history connected



ROYAL
OPERA
HOUSE

SHAKESPEARE'S
GLOBE



Royal Albert Hall



SOUTHBANK
CENTRE

National
Theatre



EDINBURGH
ZOO



ZSL

LIVING CONSERVATION



Kew

ROYAL BOTANIC GARDENS



giving
nature
a home



THE
ROYAL
PARKS



Forestry Commission

DIAGEO



NOW



NOW



THEN



THEN



Qatar

- **Qatar's development over 50 years.**
- **Largest single purchaser / commissioner of cultural infrastructure and collections in the world.**
- **Culture, heritage and museums are at the heart of its investment plans and strategy.**

Cultural GDP

- One in eight UK businesses are now part of the creative industries, and together with the cultural sectors, contributed almost £116 billion in GVA in 2019, growing at more three times the rate of the economy as a whole.
- Prior to the COVID-19 pandemic, these sectors accounted for more than two million jobs and created an additional 1.4 million jobs in the wider economy through their supply chains.
- The creative and cultural sectors were responsible for £46bn in goods and services exports which is almost 12% of all UK exports.

- **Culture, heritage and the arts are the No 1 reason that leisure visitors give for their motivation to the visit the UK.**
- **A good place to visit is a good place to live, is a good place to study, is a good place to invest in, is a good place to work.**
- **The cultural and creative industries are at the centre of both the UK Government and Official Opposition plans to “grow the economy”.**



London



- The cultural and creative industries are economically important.
- The only sectors larger than the creative industries in London are finance and real estate. Being engaged in culture is good for people's health and subjective wellbeing. There are clear rationales for public intervention to promote both social and economic development.
- The creative industries accounted for 12.6% of London's economy in 2019.
- Amongst the main sectors, the creative industries are only smaller than finance (17.4% of London's economy in 2019) and real estate (14.3%).
- The other sectors in which London specialises are professional services (12.1%) and information and communication (10.8%).

London



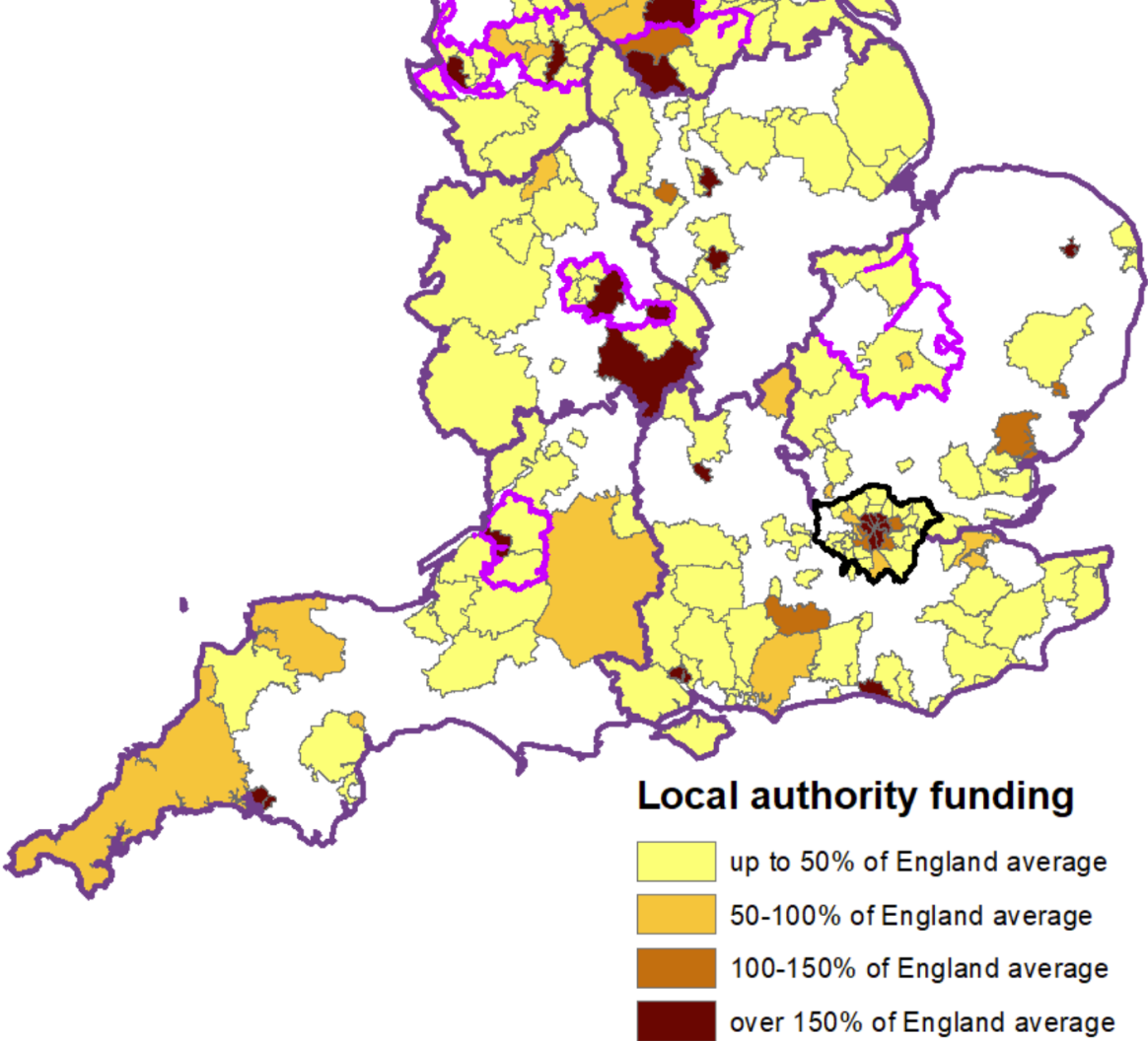
- **Increasing engagement in arts activities is associated with better health and wellbeing outcomes. Decreasing engagement is linked to steeper declines in health and wellbeing over time.**
- **All forms of cultural engagement and all art forms are positively associated with happiness and relaxation.**
- **The provision of culture may improve the effectiveness of education, developing skills for creative industries, and improving quality of life.**

Here



- **Outside London, 2nd largest number of creative & cultural businesses (10,890 enterprises) and joint 3rd by proportion of all businesses. Enterprise M3 business concentration one third above England average.**
- **Creative & cultural business and employee concentrations above the national average – notably in upper M3/M25 corridor.**
- **Creative & culture worth an estimated £4.5bn (2020), 8% of total EM3 economy, close in size to EM3 financial sector (£4.6bn), but larger than EM3 manufacturing (£3.7bn).**
- **1-in-7 businesses in Enterprise M3 in creative & cultural industries > 95% are micro-businesses (<10 employees).**

Value of ACE NPO grants to English local authorities in 2023-26 funding round



Cultural Growth Strategy Principles

- Promotes inclusive and strategic growth of the creative and cultural sectors in all areas of the UK
- Enables local communities a greater say in local cultural decision making
- Ensures high quality devolution of cultural policy while safeguarding strategic planning and accountability
- Equips local government with the resources and capacity they need to invest successfully in local culture and creativity
- Provides all citizens with access to culture in their own community



Challenges



- **Despite its importance the cultural eco-system is fragile and uneven across the UK.**
- **Museums are not a statutory service and England faces an untangling of its cultural tapestry.**
- **Data and advocacy, especially in a General Election year, is key.**



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Q&A

Bernard Donoghue OBE

@bernarddonoghue
@alva_uk



Q&A Session

To ask a question, scan here or visit
Slido.com and use **#EM3conf23**:



Enterprise M3 LEP Board Members

Barney Ely (Panel Chair),
Hays South East

Virginia Barrett,
Farnborough College of Technology

Cllr Martin Tod,
Winchester City Council

Dr Deborah Allen,
BAE Systems PLC

Michael Queen,
EM3 LEP

Daniel Ruiz,
ANGOKA Ltd





Thank you for joining us today!

