COAST TO CAPITAL SECTOR STRENGTHS MARCH 2018

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Contents

1 Introduction

In preparation for the submission of its Strategic Economic Plan for 2018, Coast to Capital (C to C) has identified five key opportunities for economic growth; International Trade, Relationship with London, Sustainable Growth, Changing Demographics, and Digital Disruption. This has been based on in-house analysis of public evidence and has moved C to C to a position where they need to explore the evidence base further. As a result, the University of Chichester has been commissioned to further consider sector strengths and specifically:

I. Identify and analysis of C to C's specific sector strengths relative to the national level at a 3 digit SIC level or below.
II. Identify which sectors are forecast to grow over the next 5-10 years.
III. Identify where these strengths are clustered in the region and analysing how they interact.
IV. Analysis of the supply chain strengths in these sectors throughout the region.

The results of the commission were required within 3 weeks and this has curtailed the depth of analysis possible, focussing on secondary analysis of data available through ONS data sets and other recent regional reports. This always creates a challenge in terms of data currency, particularly at the regional level.

The following is a summary of the work undertaken.

2 Sector Strengths

At the highest level, it is clear from the work undertaken that from the perspective of sector strengths, little has changed from the work undertaken previously in support of the first Strategic Economic Plan[1]. The priority sectors identified at this time, were based on primary and secondary research as having "a clear local concentration; potential future growth opportunities; a strong presence of internationally recognised companies; a research base to support sector development within the Coast to Capital LEP; and their FDI potential, based on UKTI's priority sectors". These sectors were:

- Creative, Digital, and Information Technology
- Advanced Manufacturing and Engineering
- Health and Life Sciences
- Environmental Technology and Low Carbon and Environmental Goods and Services.
- Financial and Business Services

In addition, the work identified two local sectors which that had the potential to generate both growth and jobs:

- Tourism – particularly the South Downs National Park, the Coast, Brighton and fully exploiting the advantage conferred by Gatwick Airport
- Food/Horticulture – the horticulture industry is a major employer in the coastal strip and food & drink is significant in the rural areas

Whilst there are some slight changes in the profile, this outcome should not be too surprising. The original work was undertaken in 2013 and 5 years is a relatively short time for fundamental economic change, especially during a period of relative economic stagnation as the world climbs out

[1] Coast to Capital Strategic Economic Plan, 2013

of recession and Brexit has further limited R&D investment in the UK. Equally, one indicator of sector strength is that it should be sustainable over time and benefit from focused investment. The fact that these sectors remain significant, suggests that C to C initiatives over the previous cycle have been relevant.

In the following sections, key economic sectors are presented. There are a number which are significant but are not discussed. These include construction, transport, retail and public administration and health. Although these are significant employers it was not felt relevant to present them in this analysis and there is no indication that they constitute a more significant sector proportionately than elsewhere in the country.

The exception is air transport related to Gatwick Airport. As would be expected there is a significant cluster of businesses providing logistics and services to the airport in the region. This is recognised and captured within C to C strategic documentation.

2.1 Creative, Digital, and Information Technology

This sector continues to demonstrate growth and relative significance to the C to C and wider regional economy. Table 2.1 is based on data from one of the 2 datasets relevant to C to C. This presents approximate Gross Value Added (aGVA) which represents the amount that individual businesses, industries or sectors contribute to the economy and the respective LEP ranking. The SIC codes included are:

· 58 Publishing activities
· 59 Motion picture, video and television programme production, sound recording and music publishing activities
· 60 Programming and broadcasting activities
· 61 Telecommunications
· 62 Computer programming, consultancy, and related activities
· 63 Information service activities
· 90 Creative, arts and entertainment activities
· 741 Specialised design activities
· 742 Photographic activities
· 743 Translation and interpretation activities
· 731 Advertising
· 7021 Public relations and communications activities
· 8552 Cultural Education

Table 2.1, Creative Industries

LEP	**aGVA 2012**		**aGVA 2013**		**aGVA 2014**		**aGVA change 2012 to 2013**	**aGVA % change 2013 to 2014**
	£m	**Rank**	**£m**	**Rank**	**£m**	**Rank**	**%**	**%**
UK	70,524		77,101		86,111		9.33%	11.69%
London	32,742	1	36,511	1	42,943	1	11.51%	17.62%
Thames Valley Berkshire	4,265	2	4,695	2	4,816	2	10.10%	2.57%
Enterprise M3	3,824	3	3,598	3	3,439	3	-5.91%	-4.39%

South East	2,012	4	2,183	4	2,336	5	8.50%	7.00%
Coast to Capital	**1,954**	**5**	**1,871**	**7**	**1,936**	**6**	**-4.28%**	**3.48%**
Greater Manchester	1,865	6	2,018	5	2,451	4	8.24%	21.40%
Leeds City Region	1,837	7	1,843	8	1,492	10	0.32%	-19.09%
South East Midlands	1,800	8	1,781	9	1,904	8	-1.05%	6.87%
Oxfordshire	1,745	9	1,896	6	1,933	7	8.68%	1.92%
Solent	1,521	10	1,455	11	1,393	15	-4.36%	-4.25%

Source: ONS 2018

Although, there is a slight decrease in relative ranking, the overall position is nationally significant. Growth is limited for this period. The broader regional significance of the connected digital sector is picked up through the Science and Innovation Audit undertaken by Innovation South. Within the South, the "connected digital" sector is large and a significant source of employment. Official figures suggest there are over 200,000 jobs in directly related sectors[2]. This is 50% more jobs than would be expected if the South simply replicated the national pattern (a location quotient – region-wide – of 1.5), Table 2.2.

Table 2.2: Insights into the connected digital sector across hubs within Innovation South – from TechNation, 2017

	Bournemouth and Poole	Brighton	Reading	Southampton	London
No of digital jobs	15,763	12,614	45,269	22,737	300,169
Digital GVA	£352m	£580m	£5.5bn	£1.1bn	£30bn
Implied GVA/job	*£22.3k*	*£45.9k*	*£121.5k*	*£48.4k*	*£99.9k*
High Growth Firms	26% [the highest figure nationally]	19%	18%	10%	20%
Start-up Births	199	218	605	270	7,682
Average advertised digital salary	£39,508	£44,608	£53,255	£45,633	£61,803
Indexed against London	*0.64*	*0.72*	*0.86*	*0.73*	*1.00*
Tech Sector Growth Potential	91%	92%	n/a	n/a	n/a
Other observations	National Centre for Computer Animation and Visual Effects at University of Bournemouth New accelerator – First Bourne "Ordnance Survey and Bournemouth Council testing a 5G	Wired Sussex – a "hub and initiator for the digital community" "Brighton is awash with hackathons, skills swaps and meetups"	"Close to, yet cheaper than, London and within each reach of Heathrow" "Many multinationals are based on Green Park"	"University of Southampton has produced 27 spin-outs since 2000" "The city has excellent international connections – a 2015 FedEx report singled out Southampton as a "export epicentre""	

[2] These relate to employment jobs identified through BRES on the basis of a rolling average from 2013-2015. Note that this estimate excludes most self employment jobs.

	Bournemouth and Poole	Brighton	Reading	Southampton	London
	mapping and planning tool”	“Gaming sector going from strength to strength”	“ConnectTVT goes from strength to strength”		

A study completed by Nesta found that about half of the companies which make up the UK games industry are located in London and the South East, and identifies established “games hubs” in Brighton and Guildford[3]. A more recent interactive map produced by a gaming industry representative body, UKIE, pointed to 69 games companies in and around Brighton; 37 in Guildford; 15 in Southampton; and 14 in Bournemouth[4]. Some of the businesses are global players, for example Creative Assembly, founded in 1987 and employing 300 people in Horsham. The sector as a whole is growing quickly and the South is extremely well positioned.

The criticality of the sector to local economies is identified for example, by the Greater Brighton region economic analysis undertaken by Regeneris[5] as is the importance of clustering (Fig 2.1). This highlights that the structure of the Brighton economy is similar to the national average, with only **three standout specialisms** in terms of concentration of activity:

•ICT and Digital – 1.4 times more concentrated, with around 7,000 jobs
•Creative activities – 1.4; around 4,000 jobs
•Visitor economy activities– 1.3; around 18,000jobs

[3] A Map of the UK Games Industry, Nesta 2014
[4] See https://gamesmap.uk/#/companies
[5] Regeneris, (2017), Brighton and Hove Economy – a working document

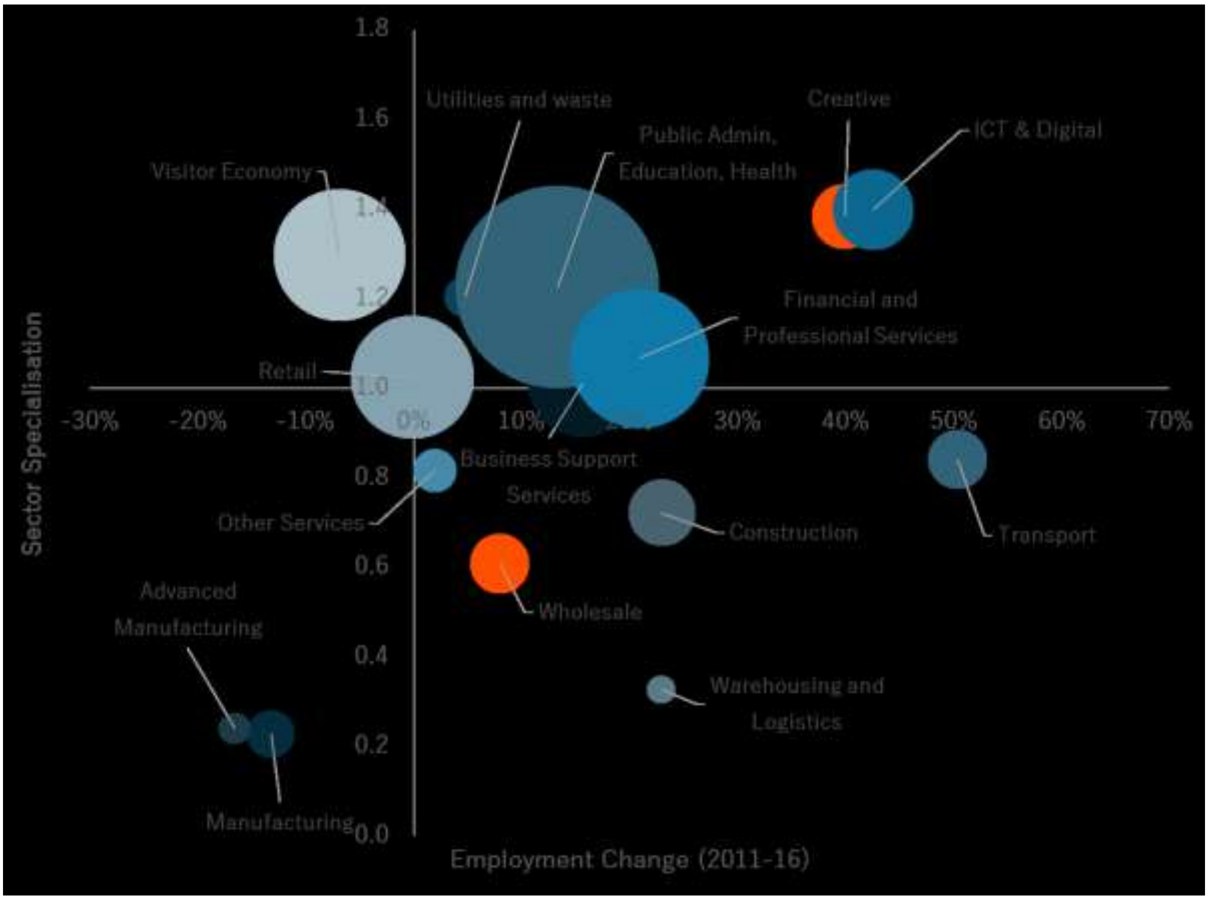

Fig 2.1 Comparative importance of Brighton Sectors and potential for Growth, Regeneris

The Brighton Fuse paper focuses on the digital and creative industries cluster in the Brighton region and how the sector has experienced high levels of growth due to its 'fused' and 'superfused' businesses.

"While Brighton's creative, design and IT firms grew faster than the local economy and more than 10 times faster than the British economy as a whole, fused business grew at more than twice that speed and superfused firms grew faster still."(Brighton Fuse 2017)

Brighton's well documented Creative Digital cluster has grown out of Brighton, in part stimulated by Wired Sussex and there is evidence that small niches of businesses are now setting up close to Brighton in Shoreham and Worthing but also as far afield as Bognor Regis with the Digital Hub at the Bognor Railway Station. All splinter locations are within reach of Brighton. There is evidence from the Bognor Regis cluster that firms can be encouraged to move as long as there is a draw for them in the form of cost, knowledge economy or space. The Brighton influence is stimulated by the presence of the Digital Catapult satellite focused on the retail opportunities for Internet of Things and in part enabled by a 5G test site. Both initiatives were stimulated by C to C.

Croydon was named "the silicon valley of south London". Croydon Tech City was set up in 2012 to encourage firms to start up their tech companies in Croydon. The organisation closed in March 2018 as they achieved their goal as it became "The UK's fastest-growing economy" (City AM, UHY Hacker; 2016). Croydon is now home to a fast developing sector that could become a global player. This is a cluster that could develop rapidly as it has gone from infancy to achieving potential in only four years.

There is further evidence of digital businesses located in a cluster around Crawley and Horsham with air transport and defence bias.

Although the original SEP recognised the importance of the Creative Digital Economy it did not go further. There is anecdotal evidence of emerging sub-sectors that provide further focus:

- Fin Tech (Financial systems developments, e.g. at American Express, Burgess Hill)
- Health Tech (Health systems development)
- Internet of Things
- Big Data and Data Science
- Artificial Intelligence/ Machine Learning/ Automation

All three Universities have strong digital skills capabilities and in the case of Sussex University, leading edge capability in Quantum computing.

2.2 Advanced Engineering and Manufacturing

Although not as significant in national terms, Advanced Engineering and Manufacturing continues to be significant in the region. The codes included within Table 2.3 by ONS include:

· 20 - Manufacture of chemicals and chemical products
· 21 - Manufacture of basic pharmaceutical products and pharmaceutical preparations
· 26 - Manufacture of computer, electronic and optical products
· 27 - Manufacture of electrical equipment
· 28 - Manufacture of machinery and equipment n.e.c.
· 29 - Manufacture of motor vehicles, trailers and semi-trailers
· 30 - Manufacture of other transport equipment
· 33 - Repair and installation of machinery and equipment
· 7112 – Engineering activities and related technical consultancy
· 325 - Manufacture of medical and dental instruments and supplies
· 712 - Technical testing and analysis
· 721 - Research and experimental development on natural sciences and engineering

The figures demonstrate a slight year on year growth and a relatively stabling LEP ranking at 11.

Table 2.3, Advanced Engineering

LEP	aGVA 2012		aGVA 2013		aGVA 2014		aGVA change 2012 to 2013	aGVA change 2013 to 2014
	£m	Rank	£m	Rank	£m	Rank	%	%
London	5,831	1	6,697	1	8,258	1	14.85%	23.31%
South East	4,276	2	4,217	3	4,966	2	-1.39%	17.76%
Enterprise M3	4,139	3	4,280	2	4,130	4	3.40%	-3.51%
Greater Birmingham & Solihull	3,090	4	3,899	4	4,710	3	26.18%	20.78%
Greater Cambridge & Greater Peterborough	3,018	5	2,838	9	3,422	6	-5.95%	20.59%
Solent	3,014	6	3,033	7	2,729	8	0.61%	-10.01%

Derby, Derbyshire, Nottingham & Nottinghamshire	2,831	7	3,498	5	1,427	21	23.56%	-59.21%
Coventry & Warwickshire	2,644	8	3,138	6	3,823	5	18.69%	21.83%
North Eastern	2,537	9	2,506	13	2,468	12	-1.25%	-1.48%
South East Midlands	2,520	10	2,556	11	2,895	7	1.43%	13.29%
Coast to Capital	**2,483**	**11**	**2,510**	**12**	**2,642**	**10**	**1.13%**	**5.24%**
Leeds City Region	2,370	12	2,591	10	2,513	11	9.32%	-3.02%
Lancashire	2,223	13	2,895	8	2,362	13	30.23%	-18.42%
Cheshire & Warrington	2,188	14	2,330	14	2,199	14	6.51%	-5.63%

Source: ONS 2018

There are a number of specific sub-sectors within engineering that have an effective presence. These were identified in the earlier work and this has seen little change. The Gatwick Diamond continues to be the focus of much of the Advanced Engineering activities (Annex 2) although there are clusters of activity around Brighton and Coastal West Sussex. The collaboration between The University of Brighton and Ricardo Engineering supported by C to C has led to the development of the Advanced Engineering Centre, which is providing a focus for regional investment in propulsion research and automation.

The recent initiative by Rolls Royce Motorcars to build its Technology and Logistics Centre in Bognor Regis has further cemented its commitment to the region and this looks likely to be expanded further. In discussion with Arun District Council, the arrival of the company appears to have stimulated an increase in companies wanting to locate to the area and many of these have stated that they are suppliers to Rolls Royce wanting to position themselves close to their main purchaser. Many local companies that would like to supply to Rolls Royce have increased their business visibility and 'smartened' up their offer in order to supply to this prestigious firm.

Key sub sectors in the region are mostly showing some growth:

- Aerospace and Defence; Thales,
- Automotive; Ricardo, Rolls Royce Motorcars, Dearman Engines
- Electrical and Electronic including sensors; B&W, Motorola,
- Med Tech; Varian, Elekta, Phillips

2.3 Health and Life Sciences

'From world-renowned Medical and Diagnostic Technology companies, to major Pharmaceuticals and Industry Support services, West Sussex's Health and Life Sciences Cluster is booming' (WSCC 2015). A survey by West Sussex County Council identified over 90 Health and Life Science businesses in the region and these are mapped in Appendix 1. The companies are split into sub-sectors; source West Sussex Health and Life Sciences Cluster - (http://www.businesswestsussex.co.uk/storage/downloads/resource_westsussexhealthlifesciencesindustryprofile_1455708518.pdf) :

- Pharmaceutical - Pharmaceuticals has typically been a market for large companies. The time and investment required can often mean large barriers to entry and therefore fewer companies. The pharmaceuticals sub-sector in West Sussex is small in number but high in value. There are nine companies in the sub-sector but it is the top four which dominate in terms of the turnover figures in general global brand awareness. All four are multinationals and the remaining SMEs are high turnover ventures compared to other industries. The work being carried out is often complex research and development along with manufacturing, requiring highly skilled staff who are all contributing to the reputation of the county within the sector. As well as GlaxoSmithKline, the region is home to Novo Nordisk, the diabetes care company and CSL Behring the plasma protein biotherapies company who develop therapies from human plasma.
- Specialist services & suppliers - As a result of the strong health and life science sector across West Sussex and the wider South East, several companies which work symbiotically with the industry have been able to thrive. There are 39 companies that have links to the medical technologies and pharmaceuticals companies, with three multinationals such as Fisher Clinical Services and Cmed offering a range of services including clinical trials, product development consulting and supply chain management. The smaller companies in this sub-sector offer a whole range of services, including Cryolab which provides cryogenic laboratory equipment and services for things like IVF provision. There are also consultancy companies that assist with product design like Maddison Product Design helping with prototyping and commercialising new technology. Theradex has built its business by providing clinical research services focused on oncology. Pentagon Plastics offers toolmaking and plastic moulding for product development and production. Parafix provides tailored adhesive solutions with medical tape, foam, film and foil materials.
- Medtech - The Medtech sub-sector is the largest of the three sectors identified with 57 companies. Nearly two out of three companies in the sub-sector are SMEs and there are several large multinationals doing ground-breaking research on the future of care. This is through technological medical devices and the design, manufacture and sale of technology used in identifying and testing for biological illnesses and diseases. This can include techniques such as Magnetic Resonance Imaging or CT scans to technologically enhanced blood testing. This varies in areas of specialism, from the work of Elekta in innovative radiotherapy techniques, to Aurora who design and develop orthopaedic medical implants. In the start-up space, companies such as Capillary Film Technology who develop microfluidic technology for field and point of care use and Diaco who produce a dental chair specifically for the use of wheelchair patients. Multinationals such as Roche Diagnostics, Straumann, Varian Medical Systems and Philips Respironics are also based in the region
- Care - There are several care providers across West Sussex, both public and private. The strength of the service provided by these hospitals is a credit to the county and provides a strong foundation on which to build upon the successes of the Health and Life Sciences industries. It couples the cluster's excellent research and development credentials with a practical test-bed on which to grow. The county is served by three Clinical Commissioning Groups: Crawley, Horsham and Mid Sussex and Coastal West Sussex. Each group's population faces different challenges. There are a significant number of smaller private care and nursing providers.

There is significant investment from industry in this area for example, GlaxoSmithKline investing £100 million into their Worthing site and this is expected to rise to £200 million over the next three years. The site currently employs over 900 people and with investment, this is likely to grow. WSCC is also investing in the sector through the purchase of the Novartis site in Horsham.

2.4 Low Carbon

The UK low carbon and renewable energy (LCRE) economy grew by 5.0% to £42.6 billion in 2016, from £40.5 billion in 2015; it continued to account for around 1% of total UK non-financial turnover. The number of employees working directly in the LCRE economy in the UK, grew by 3.3% to 208,000 full-time equivalents (FTE) in 2016, from 201,500 in 2015; it continued to account for around 1% of total UK non-financial employees.[6]

In terms of contribution to the C to C economy, low carbon is still a relatively small in terms of GVA and jobs supported but it is a growth area. Examples include; the development of the Rampion Wind Farm operated by EDF and the associated Enterprize Zone in Newhaven supported by C to C, Tangmere Solar Farm, Shorham Port wind turbines and PV installation.

Businesses such as Ceres Power in the Gatwick Diamond have significant potential to support growth in this area that is also relevant to the government's Industrial Strategy.

2.5 Financial and Professional Services

Financial and Professional Services continues to be the most significant sector in the C to C Economy. A large number of businesses have a presence in the region, many with HQ such as American Express in Burgess Hill and Brighton and OCS in Crawley. Many operations are local offices of larger and multi-national businesses. Equally there are a large number of small partnerships and consulting businesses that serve the local communities. Some of the larger businesses in Gatwick Diamond are indicated in Appendix 2.

As an example, the sector is one of the largest employers in Brighton, employing over 32,000 individuals with specific specialisms in Banking (7,000 jobs), Insurance (4,000 jobs) and Management Consulting (2,750 jobs)[7]. An analysis by West Sussex County Council would suggest that the sector contributes at least 20% of County GVA[8].

2.6 Horticulture

The Coast to Capital region has one of the largest horticulture regions in the UK, employing upwards of 9,000 fte's providing in excess of £1bn production. The sector has an increasing number of knowledge based jobs. This sector has an effective cluster network, West Sussex Growers Association. Crops are grown all year round in 200 hectares of glasshouses and 200 hectares of polythene structures. The area covered is mainly across Chichester and Arun districts.

The sector is becoming increasingly important in energy generation and their combined heat and power generation is steadily increasing. This is alongside the anaerobic digestion systems that are becoming more numerous. The CHPS at Tangmere is generating some 12 megawatts of power into the National Grid. Another area of innovation is water harvesting with many greenhouses now harvesting water from their rooves.

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[6] UK Environmental Accounts: Low Carbon and Renewable Energy Economy Survey: 2016 final estimates

[7] Regeneris, (2017), Brighton and Hove Economy – a working document

[8] West Sussex Life 2017-19

The sector is expected to grow over the coming years with the Growers continuing to develop strategies with Local Authorities, land owners and other stakeholders to identify suitable land for horticultural development. An example of a developing crop are vineyards for English wine.

There is a considerable cluster around the region for this industry and many of those companies supporting it through the supply chain are also within the cluster. These companies are Transport & Logistics, Irrigation & Engineering, IT & Communications, Horticultural Supply Companies, Training Providers and Consultants.

Although the horticulture industry does not generate as much income as other sectors, it is significant and should be recognised for its contribution and continued growth.

2.7 Tourism

Tourism is a big industry in the Southeast and the Coast to Capital area encompasses a large portion of this industry. Brighton is in the top ten of areas to visit for overseas visitors with over 465,000 visits in 2016. Overall it attracts some 8 M visitors annually spending £560 M.[9] There are a great number of festivals and events such as the Brighton Festival, Pride, Brighton Digital Festival, Brighton Fringe, the Brighton Marathon and the Great Escape Music Festival. There is also a large conference centre, the Brighton Centre, which hosted the 2017 Labour Party Conference. It is estimated that the visitor economy supports some 18,000 jobs in the city.

Tourism is equally a vital part of the Coastal West Sussex economy but there has not been a significant increase in visitor numbers or above trend visitor expenditure over the past five years. 2013 estimates suggest that visitors spend around £760m in the four districts/boroughs each year, supporting just over 14,000 FTE jobs. On this basis, around £55,000 of additional visitor expenditure would support one full-time equivalent job. More than three quarters (77%) of all tourism expenditure in Coastal West Sussex is spent in Chichester (46%) and Arun (31%). By contrast, Adur accounts for under 6% and Worthing around 18% of visitor spending. This pattern is also broadly reflected in tourism related employment.

Figure 5: Visitor Spend and Supported Jobs in Coastal West Sussex 2013 (£m)

	Overnight (£m)	Day (£m)	Total (£m)	FTE Jobs
Coastal West Sussex	345	413	758	14,200
Adur	13	31	44	800
Worthing	61	74	135	2,600
Arun	111	122	233	4,500
Chichester	160	186	346	6,300
West Sussex	573	665	1,238	20,400

[10]

The South Downs National Park is the largest rural resource for recreation and tourism in the South East of England, thus tourism plays a significant role in its local economy. The SDNP is a major part of the Coast to Capital LEP Region. Their strategy concludes with four 'visitor facing' themes, used to engage the public in experiencing the National Park:

- Adventure Land;

[9] Regeneris, (2017), Brighton and Hove Economy – a working document
[10] Underground Sussex; Growing the Value of Tourism in West Sussex

- Cultural Land;
- Natural Land;
- Working Land

The national park has developed a comprehensive strategy for increasing usage of the park area which will provide tourism and employment opportunities.

The data for tourism in the Coast to Capital region is very fragmented and developed for local areas and tourism sites. This does not allow for the development of a larger picture of what the situation in the LEP Region is as a whole.

2.8 Higher Education

The Coast to Capital area has three University's within its boundaries: Sussex, Brighton and Chichester. Brighton has a student population of 21,000 students, Sussex has a student population of 15,000 students and Chichester has 5,500 students. The economic impact of the universities is wide ranging and combines low skilled employment with high skilled employment and generates new industry from ground breaking research.

Brighton University has shown a substantial growth from 2008-09 when the university's economic impact was last measured. The value to the economy has risen more the £100m and the number of jobs its supports has grown by 1,000 in 2014. Research has shown that in 2013,when the university attracted more than 21,334 students, 10,881 of them from the South East, 7,453 from other parts of the UK, and 3,000 of them from outside the UK. The university's and its students' expenditures generated £96m and 1,060 jobs in Eastbourne or 2.8 per cent of jobs; and in Brighton and Hove they generated £483m of output and more than 4,900 jobs, equivalent to nearly 4 per cent of all employees.

Sussex University supported a £274 million gross value added contribution to UK GDP; The University contributed £197 million of the economic output created in Brighton and Hove and Lewes. This is projected to rise to £285 million by 2018. Economic activity linked to the University supported 3,700 jobs in the local area, increasing to 4,500 supported jobs across the South East region; 10,500 of the 13,830 students at Sussex live in the local area, with a quarter remaining and taking up work in the area following graduation. The report showed that the University's 'value-added' contribution direct to the local economy is projected to rise by 45 per cent to £285 million by 2018.

The University of Chichester has 5,500 students and 890 staff across its two campuses in Chichester and Bognor Regis. In 2013/14 it contributed £126 m to the local economy. With the development of the new Tech Park this is projected to rise to £165m in 2021/22.

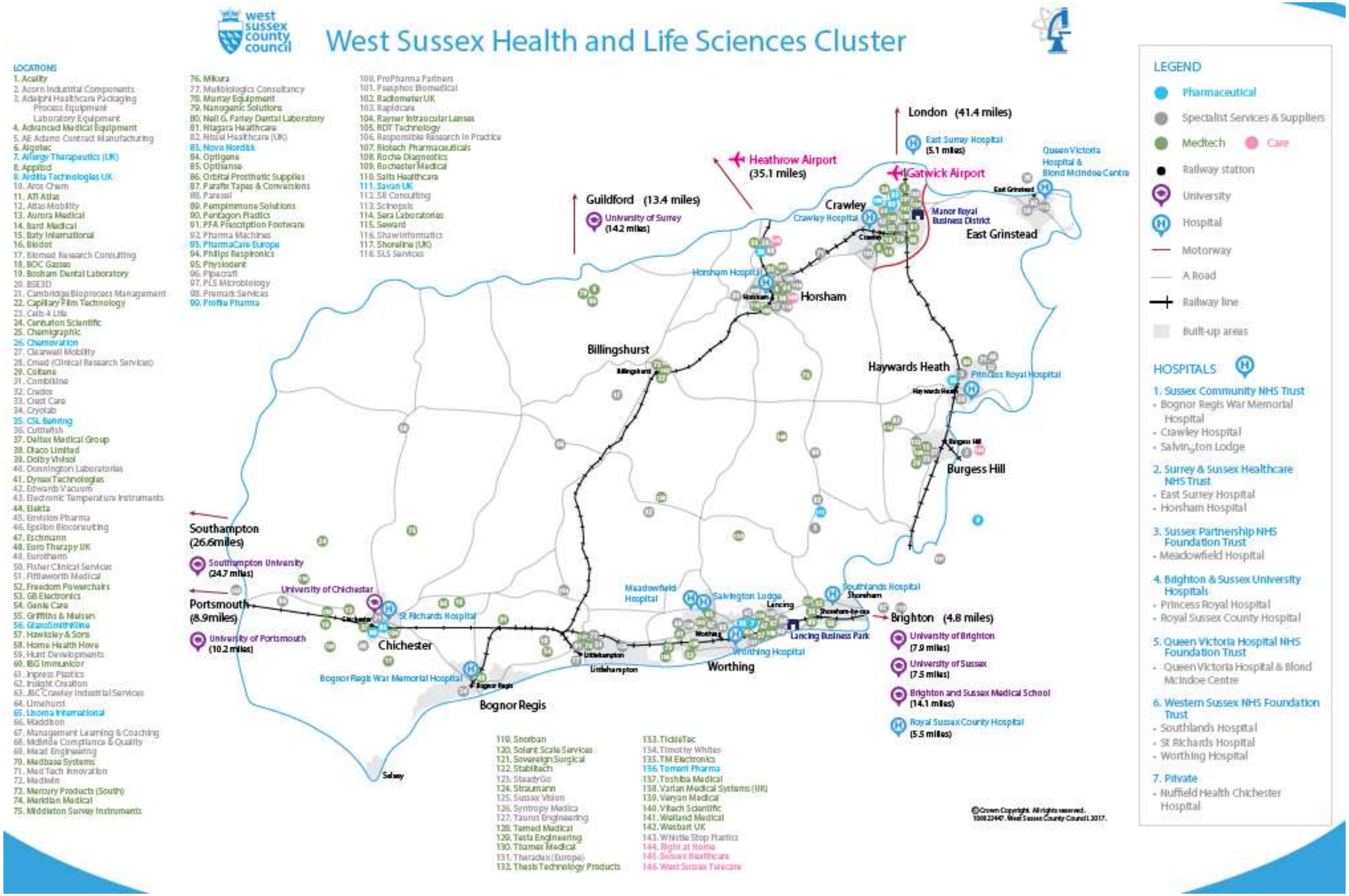
Additional References

WSCC (2015) West Sussex Health and Life Science Cluster: Where Health and Life Sciences businesses innovate and flourish. Published by WSCC

BIS (2015) Smart Specialisation in England: Submission to the European Commission. Crown Copyright BIS/15/310

Brighton Fuse (2017) The Brighton Fuse by the University of Brighton and the University of Sussex

Appendix 2


west sussex county council
West Sussex Health and Life Sciences Cluster
LOCATIONS
1. Acelity
2. Acorn Industrial Components
3. Adelphi Healthcare Packaging
Process Equipment
Laboratory Equipment
4. Advanced Medical Equipment
5. AE Adams Contract Manufacturing
6. Algotec
7. Allergy Therapeutics (UK)
8. Applied
9. Ardita Technologies UK
10. Aros Chem
11. ATI Atlas
12. Atlas Mobility
13. Aurora Medical
14. Bard Medical
15. Baty International
16. Biodot
17. Biomed Research Consulting
18. BOC Gasses
19. Bosham Dental Laboratory
20. BSE3D
21. Cambridge Bioprocess Management
22. Capillary Film Technology
23. Cells 4 Life
24. Centurion Scientific
25. Chemigraphic
26. Chemovation
27. Clearwell Mobility
28. Cmed (Clinical Research Services)
29. Coltene
31. Combikine
32. Credos
33. Crest Care
34. Cryolab
35. CSL Behring
36. Cuttlefish
37. Deltex Medical Group
38. Diaco Limited
39. Dolby Vivisol
40. Dennington Laboratories
41. Dynex Technologies
42. Edwards Vacuum
43. Electronic Temperature Instruments
44. Elekta
45. Envision Pharma
46. Epsilon Bioconsulting
47. Eschmann
48. Euro Therapy UK
49. Eurotherm
50. Fisher Clinical Services
51. Fittleworth Medical
52. Freedom Powerchairs
53. GB Electronics
54. Genie Care
55. Griffiths & Nielsen
56. GlaxoSmithKline
57. Hawksley & Sons
58. Home Health Hove
59. Hunt Developments
60. IBG Immunicor
61. Inpress Plastics
62. Insight Creation
63. JBC Crawley Industrial Services
64. Limehurst
65. Lisoma International
66. Maddison
67. Management Learning & Coaching
68. McBride Compliance & Quality
69. Mead Engineering
70. Medbase Systems
71. Med Tech Innovation
72. Medivin
73. Mercury Products (South)
74. Meridian Medical
75. Middleton Survey Instruments
76. Mikura
77. Multibiologics Consultancy
78. Murray Equipment
79. Nanoganic Solutions
80. Neil G. Farley Dental Laboratory
81. Niagara Healthcare
82. Nissel Healthcare (UK)
83. Novo Nordisk
84. Optigene
85. Optisense
86. Orbital Prosthetic Supplies
87. Parafix Tapes & Conversions
88. Parexel
89. Pempimmune Solutions
90. Pentagon Plastics
91. PFA Prescription Footwear
92. Pharma Machines
93. PharmaCare Europe
94. Philips Respironics
95. Physiodent
96. Pipecraft
97. PLS Microbiology
98. Premark Services
99. Profile Pharma
100. ProPharma Partners
101. Poesphos Biomedical
102. Radiometer UK
103. Rapidcare
104. Rayner Intraocular Lenses
105. RDT Technology
106. Responsible Research in Practice
107. Riotech Pharmaceuticals
108. Roche Diagnostics
109. Rochester Medical
110. Salts Healthcare
111. Savan UK
112. SB Consulting
113. Scinopsis
114. Sera Laboratories
115. Seward
116. Shaw Informatics
117. Shoreline (UK)
118. SLS Services
119. Snorban
120. Solent Scale Services
121. Sovereign Surgical
122. Stabiltech
123. SteadyGo
124. Straumann
125. Sussex Vision
126. Syntropy Medica
127. Taurus Engineering
128. Temed Medical
129. Testa Engineering
130. Thames Medical
131. Theradex (Europe)
132. Thesis Technology Products
133. TickleTec
134. Timothy Whites
135. TM Electronics
136. Torrent Pharma
137. Toshiba Medical
138. Varian Medical Systems (UK)
139. Veryan Medical
140. Vitech Scientific
141. Welland Medical
142. Wesbart UK
143. Whistle Stop Plastics
144. Right at Home
145. Sussex Healthcare
146. West Sussex Telecare
London (41.4 miles)
East Surrey Hospital (5.1 miles)
Heathrow Airport (35.1 miles)
Gatwick Airport
Queen Victoria Hospital & Blond McIndoe Centre
Guildford (13.4 miles)
University of Surrey (14.2 miles)
Crawley
Crawley Hospital
Manor Royal Business District
East Grinstead
Horsham Hospital
Horsham
Billingshurst
Haywards Heath
Princess Royal Hospital
Burgess Hill
Southampton (26.6miles)
Southampton University (24.7 miles)
University of Chichester
Portsmouth (8.9miles)
University of Portsmouth (10.2 miles)
St Richards Hospital
Chichester
Bognor Regis War Memorial Hospital
Bognor Regis
Meadowfield Hospital
Salvington Lodge
Lancing
Southlands Hospital
Shoreham
Lancing Business Park
Worthing Hospital
Worthing
Littlehampton
Selsey
Brighton (4.8 miles)
University of Brighton (7.9 miles)
University of Sussex (7.5 miles)
Brighton and Sussex Medical School (14.1 miles)
Royal Sussex County Hospital (5.5 miles)
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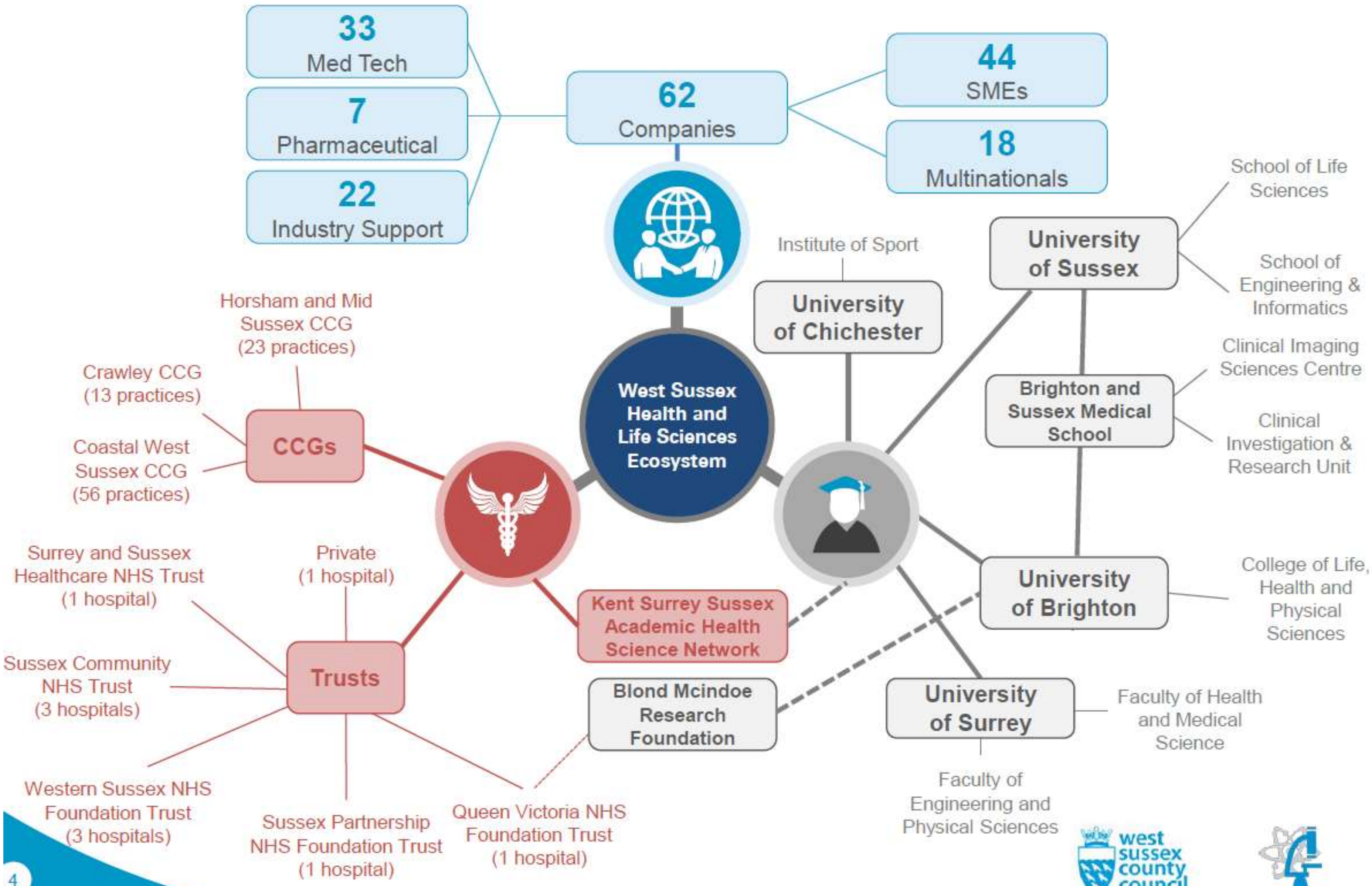
LEGEND
Pharmaceutical
Specialist Services & Suppliers
Medtech
Care
Railway station
University
Hospital
Motorway
A Road
Railway line
Built-up areas
HOSPITALS
1. Sussex Community NHS Trust
- Bognor Regis War Memorial Hospital
- Crawley Hospital
- Salvington Lodge
2. Surrey & Sussex Healthcare NHS Trust
- East Surrey Hospital
- Horsham Hospital
3. Sussex Partnership NHS Foundation Trust
- Meadowfield Hospital
4. Brighton & Sussex University Hospitals
- Princess Royal Hospital
- Royal Sussex County Hospital
5. Queen Victoria Hospital NHS Foundation Trust
- Queen Victoria Hospital & Blond McIndoe Centre
6. Western Sussex NHS Foundation Trust
- Southlands Hospital
- St Richards Hospital
- Worthing Hospital
7. Private
- Nuffield Health Chichester Hospital

West Sussex Health and Life Sciences Cluster



Appendix 2

Gatwick Diamond Businesses By Sector (http://www.gatwickdiamond.co.uk/the-gatwick-diamond/global-brands-sectors.aspx)

Advanced Manufacturing & Engineering

- Aegis Rubber Engineering
- Avesco
- Cogenco
- Cova Security Gates
- Doosan Babcock
- Edwards
- Elekta Oncology
- Harsco Metals & Minerals
- HPC Engineering
- Johnston Engineering
- Honeywell
- Motorola
- Siemens UK
- Sony
- TDK Electronics UK
- Thales UK
- Tesla Engineering
- Time 24
- Tokyo Electron
- Toshiba Medical Systems
- Toyota G.B
- Trends Control Systems
- TVR
- Varian Medical Systems UK
- Vent Axia Group

Aviation, Aerospace & Defence

- Aerotron
- Air Partner
- Bristow Helicopters
- British Airways
- CAE STS

- Chapman Freeborn Holdings
- Easyjet
- Emirates
- ERA Technology
- Gatwick Airport
- Link Simulation and Training (UK)
- Mullard Space Science Laboratory
- Quadrant Systems
- Rockwell Collins UK
- Thales UK
- TUI
- Virgin Atlantic

Environmental Technologies

- Biwater Holdings
- Ceres Power
- CGG Veritas
- Doosan Power Systems
- Edwards High Vacuum International
- Sutton and East Surrey Water
- EDF Energy
- ESHCon
- Esso
- ExxonMobil
- Petrochem Carless
- Schlumberger Oilfield
- Scotia Gas Networks
- Trend Control Systems
- Vent Axia Group

Food & Drink

- Alpha LSG
- Campden BRI
- Denbies Wine Estate
- Fab Foods
- Hepworth & Company Brewers

- Kates Cakes
- Lactalis McLelland
- Leatherhead International
- Nestle UK
- Nestle Waters
- Ridgeview Wine Estate
- Unilever UK
- The Compleat Food Group
- Yoplait UK

Financial & Professional Services

- Aircom International
- Aon Hewitt
- AMEX
- Aria Insurance
- Assurity Consulting
- BDO Accountants and Advisors
- Black and Veatch
- Canon UK
- Carlton Asset Management
- CGI
- Deloitte
- Equiniti Group
- ESure Insurance
- First National
- Friends Life Group
- G4S
- Grant Thornton
- HSBC
- Jellyfish
- Just Retirement
- KPMG (South East)
- Lloyds Bank
- Legal & General
- Lombard North Central
- OCS Group UK

- [Premium Credit]
- [PWC]
- [RBS]
- [Rentokil]
- [Royal and Sun Alliance]
- [Royal Haskoning DHV]

- [RSM]
- [Rule Financial]
- [Sabre Insurance Company]
- [Santander Consumer]
- [Search Consultancy Group]
- [Symbios Spazio]
- [Tower Watson]
- [Unum]
- [Wates Group Services]
- [WesternGeco]
- [WS Atkins]

Life Sciences, Health Technologies & Medical Devices

- [Acelity]
- [Adelphi]
- [Advanced Medical Equipment]
- [Bard Medical]
- [Baty]
- [Capillary Film Technology]
- [Cells4life]
- [Central Surrey Health]

- [Cmed (Clinical Services)]
- [CSL Behring Ltd]
- [Dolby Vivisol]
- [Elekta Oncology]
- [Fisher Clinical Services]
- [Halyard]
- [JBC Crawley Industrial Services Ltd]

- Mercury Products (South) Ltd
- Mikura Ltd
- Nissei Healthcare (UK) Ltd
- Novo Nordisk
- Pentagon Plastics
- Pfizer UK
- Pharma Machines
- Radiometer UK Ltd
- Roche Diagnostics
- Straumann
- Theradex (Europe) Ltd
- Torrent Pharma
- Toshiba Medical Systems
- Varian Medical Systems UK
- Veryan Medical Ltd
- Welland Medical
- Wesbart UK Ltd