



FOREST

ECONOMIC PARTNERSHIP

Delivering a thriving economy

Today's Agenda



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1. Welcome from Andrew Callard, Chair of FEP
2. Community Interest Company (CIC) Update – Wendy Jackson
3. Proposal to merge Sub-Groups - Andrew Callard
4. Project Update:
 - How Fast? How Good? (David Trevelyan, Chair Digital Connectivity)
 - Bridging the Gap (David Trevelyan, Chair Digital Connectivity)
 - Economic Case for a Forest Biosphere Reserve (Andrew Callard on behalf of Transport & Infrastructure)
 - IF- Inspiring the Forest (Sarah Taylor IF Action Group)
5. Severn Vale Board
6. Grand Challenge – Aging Society
7. Close of Meeting



FEP - Community Interest Company

- Working with Griffiths Marshall to register
- Articles of Association & Director's Handbook
- CIC limited by guarantee
- 6 Directors at registration
- Target CIC formation 11th October 2019
- Post formation – bank account & insurance cover

FEP Projects Update



- How Fast? How Good? (David Trevelyan, Chair Digital Connectivity)
- Bridging the Gap (David Trevelyan, Chair Digital Connectivity)
- Economic Case for a Forest Biosphere Reserve (Andrew Callard)
- IF- Inspiring the Forest (Sarah Taylor)

How Fast How Good (HFHG) – Overview

- Surveys of residents and businesses within the Forest of Dean
 1. Measurement of current Forest of Dean performance against national average
 2. Technical survey of quality of service of fixed broadband
 3. Survey of mobile service and connectivity

HFHG – Update (Survey 1)

- Online survey available 6th June to 6th August 2019
- 381 Responses across the district
- Information Requested
 - Which Broadband Speed results
 - Broadband Provider
 - Demographic Information
 - User Information / Needs
 - Performance and Perception

HFHG – Findings: Broadband Performance

Service (Max Download)	Download (Mbps)	Upload (Mbps)	Latency (ms)
<i>UK Average (All Services)</i>	54.2	7.2	10 → 30
<i>UK Rural Superfast (Fibre)</i>	28	-	-
<i>UK Rural Average (ADSL)</i>	7.2	0.8 ADSL	20 → 30

HFHG Survey Results

Service (Max Download)	Download (Mbps)	Upload (Mbps)	Latency (ms)
HFHG (All Services)	13.1	3.5	136
HFHG Superfast (Fibre)	31.1	10.1	84
HFHG (ADSL)	5.6	0.7	152

HFHG – Findings: Broadband Satisfaction

Service (Max Download)	Perception
<i>UK Average (All Services)</i>	<i>No Ofcom Data</i>
<i>UK Rural Superfast (Fibre)</i>	<i>No Ofcom Data</i>
<i>UK Rural Average (ADSL)</i>	<i>No Ofcom Data</i>

Perception:

Measured on a 5 point scale

1. *Highly Satisfied*
2. *Somewhat Satisfied*
3. *Neutral*
4. *Somewhat Dissatisfied*
5. *Highly Dissatisfied*

HFHG Survey Results*

Service (Max Download)	Perception
HFHG (All Services)	Somewhat Dissatisfied
HFHG Superfast (Fibre)	Neutral
HFHG (ADSL)	Highly Dissatisfied

** The survey recognises that dissatisfied residents and businesses are more like to respond to a satisfaction survey*

HFHG – Next Steps

- Based on the results of the Survey, FEP is focused on enabling practical improvement
 1. Continuing to work with partners to facilitate the technological fix.

Communities working together to understand the benefits which result from fast, reliable broadband.
 2. Beginning to unpick issues of perception and knowledge?

Verification of performance of broadband and what knowledge do users need to optimise their broadband service.
 3. Leading on the reality of rural broadband through succeeding surveys?

76% of respondents indicated a willingness to participate in further research. Future surveys will be more focused (Business only, Slowdown during peak, what is satisfactory broadband, what technical help is needed within premises)

HFHG – Next Steps Discussion

- 3 Areas for Action

1. Continuing to work with partners to facilitate the technological fix.
2. Beginning to unpick issues of perception and knowledge?
3. Leading on the reality of rural broadband through succeeding surveys?

Discuss (10 Minutes)

- Identifying and communicating the benefits of high quality / high speed broadband
 - What is important now
 - What could be important in the future
- Linking communities with partners for technical fixes (I.e. Fastershire, Government Grants, self funding etc)
 - Who are the community partners
 - Who are the technical partners
 - How do we raise profiles
- What further information needs to be collected in surveys?
 - Where could this information be fed into?

Digital Connectivity – Other Projects / Info

- Bridging the Gap – Addressing the broadband speed gap in Hewelsfield
 - *Contractor has been engaged to look at a wireless solution in the Hewelsfield area*
 - *Currently progressing at expected speed (slow) – speed of progress as expected from usual utility providers*
- Churcham (A40) / Fastershire Project
 - *Fastershire are looking for businesses to take up MGBroadband Grants*
 - *Struggling to achieve the necessary level of uptake.*
 - *Includes door to door*
 - *Direct contact with the Parish Council*

ECBR Overview

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What

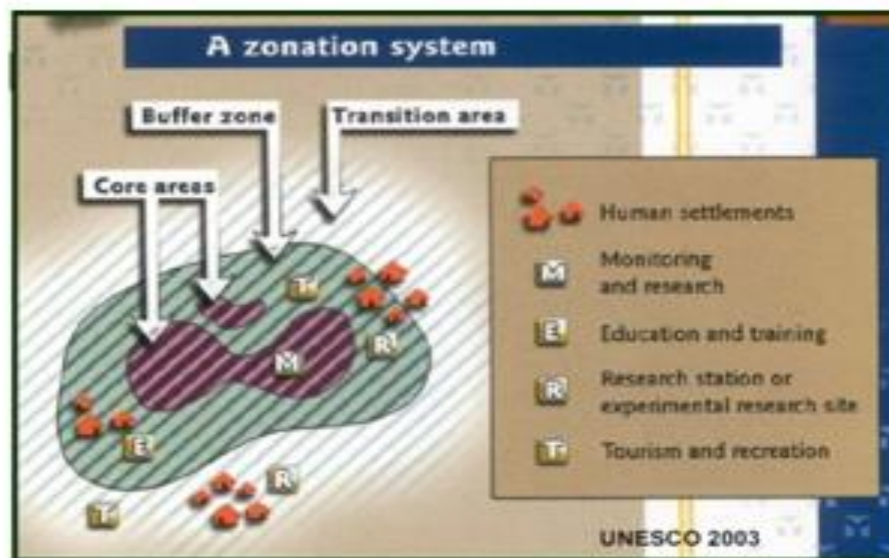
- Core Zones
- Buffer Zones
- Area of Cooperation

- ONS need and CSR
- Report Dec 2019



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Potential Benefits Biosphere Benefits List

- Improved carbon sequestration
- Reduction in other pollutants
- Increases in agricultural GVA
- Increases in forestry GVA
- Increases in other GVA
- Reductions in the costs of flooding
- Improvements in research efficiency
- Increased working from home delivering lower commuting costs
- Housing values rise
- Health benefits
- Increased happiness of local population.

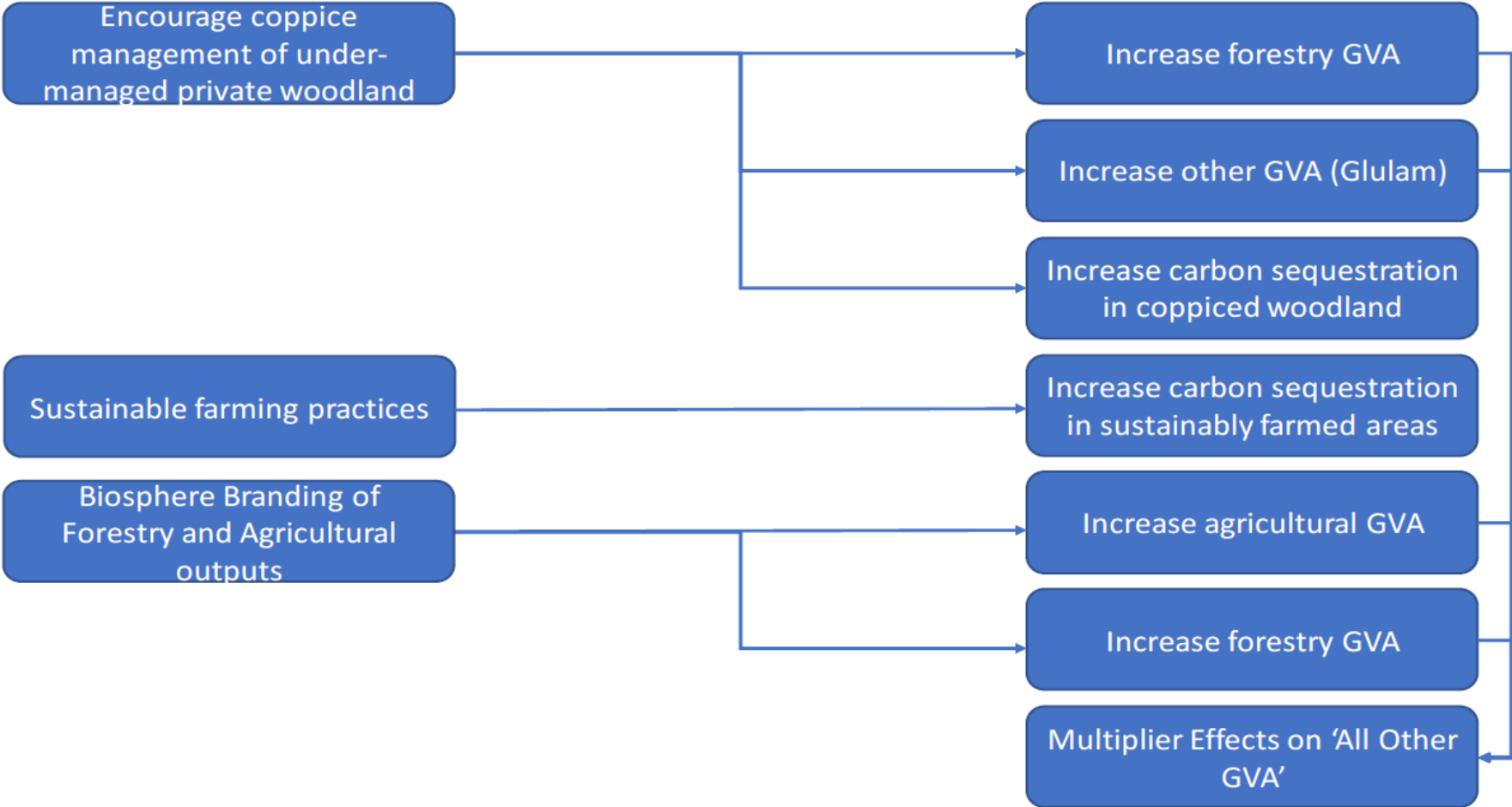


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Modellable Benefits



Base-case (Do Nothing)

Benefit Stream	Nominal Benefits (£m)
Carbon sequestration	£242.5m
Agriculture GVA	£810.8m
Forestry GVA	£766.1m
All other GVA	£66,397.9m
Total Nominal Benefits	£68,217.3m

Basecase Benefits

Total Nominal Benefits	£68,217.3m
Total Real Benefits	£50,042.4m
Total Discounted Benefits	£31,302.9m

Benefit Stream

Nominal Benefits (£m)

Carbon capture lost through coppicing	-£4.5m
Carbon capture gained through coppicing	£5.2m
Carbon capture gain from sustainable farming	£42.3m
GVA agricultural sector – branding	£8.9m
GVA forestry sector - coppiced timber	£3.9m
GVA forestry sector – branding	£80.1m
GVA other sectors	£17.3m
Multiplier effect	£6.5m
Total Nominal Benefits	£159.7m

Scenario Benefits

Total Nominal Benefits	£159.7m
Total Real Benefits	£110.8m
Total Discounted Benefits	£61.6m

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The Result is Positive



(£m NPV)	
Discounted Benefits	£61.55m
Minus -	
Discounted Costs	£15.83m
Equals =	
Net Present Value	£45.72m
Benefit-Cost Ratio	3.89:1

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Warnings and Next Steps



- Bias weighting- 40% optimism bias from HM Treasury Green Book to benefits and costs
- Costs include the £200,000 and 3 years to Bio-reserve status
- Net present value is not cash benefits but non-cashable split out still gives a first order estimation of 2.95:1
- Benefit cost ratios should not be regarded as a contract!
- Thanks to ONS staff for undertaking this world first analysis
- Next steps up to T&I Sub-group meeting to begin discussing on 18th September to propose at next Stakeholder meeting 11th December the way forward.

Sponsorship Opportunities for Local Inspiring Forest Event (LIFE)

Our Unique Landscape



Businesses on our Doorstep

- Amazing businesses and organisations of all types and sizes are on our doorstep
- Over 4000 businesses in this area
- 203 square miles of opportunity

Objectives of Inspiring the Forest

- Through a series of events over 3 years we aim to
 - Raise aspirations amongst the young, parents, teachers and adults across the Forest of Dean
 - Show local residents what amazing businesses and opportunities are on the doorstep
 - Create closer links between schools, councils and businesses
 - Create a community

**You cannot be
what you
cannot see**

What is the LIFE Event at Dene Magna?



What is the LIFE Event at Dene Magna?

It's NOT a careers fair!

- It's an interactive experience to learn about the local employment landscape, different industry sectors, the roles and jobs and what skills are needed in local companies.
- Of 10 key district industry sectors, 5 are represented Hospitality & Tourism; Manufacturing & Engineering; Health & Well-being; ICT and Construction

In each zone there's a focus on

- Experience-based activities that reflect the core skills needed in the sector regardless of size of company.
- Starting conversations that support young people to decide which career may be interesting. A conversation that might turn into work experience and ultimately job offers and then further opportunities and pathways.
- Information on the size and nature of the sector and where products or services end up in the world.

Hidden jobs in local business

Think about a manufacturing or engineering company

- If a person is great with their hands, there might be a job locally for them to work in the technical team to fix machinery
- If a pupil is great at chemistry, there might be a laboratory on site where someone tests materials used for formulations for manufacturing. (Like making slime for a living..)
- Together with manufacturing or engineering roles, there are social media jobs along with roles in finance, HR , marketing, logistics and sales roles

What do YOU get from being part of LIFE ?

- To communicate with future candidates, pupils, teachers, carers, parents and grandparents
- Target students / adults (emerging talent) with the right skills or passions to provide your future workforce
- Support the understanding of teachers of the local employment landscape, transferable skills, employability and career pathways
- Awareness as an employer / business in the Forest of Dean

Sponsorship Opportunities

- **Contributor From £5 to £99**
 - Name in event guide
- **Goody bag sponsor £100**
 - Promotional/print item smaller than A4 in the goody bag
 - Name and logo in the event guide
- **Regular Sponsor cost £250**
 - Pop-up banner displayed
 - Potential inclusion in the event video

Sponsorship Opportunities

- **Sector Sponsor Cost £1250**
 - Banners and marketing material in the industry sector zone
 - Logo on the goody bag
 - Internal communications to the school community will include your name and logo
 - Benefit from publicity and PR created by FEP
 - Benefit from FEP social media marketing in the run up, during and after the event

Sponsorship Opportunities

- **Lead Sponsor Cost £5000**
 - Your organisation name and logo on all marketing material, including fliers, internal posters & banner outside school
 - Your pop-up banners and marketing at entrance/exit of the event
 - Logo and 300 words copy in the event guide
 - Your name and logo on all communications sent out about the event to include parents and stakeholders.

Signing Up



- Come and see me after this meeting
- Or request forms through fep@fdean.gov.uk

Glos 2050

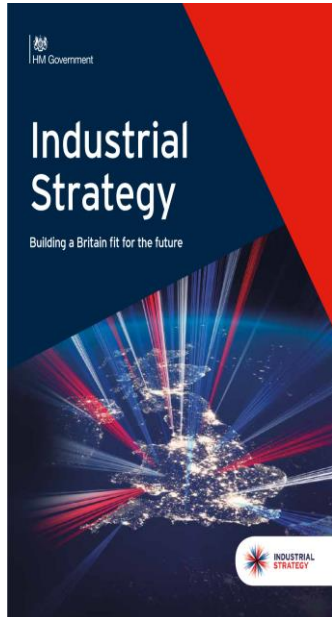
Severn Vale Board



- One of 3 boards being established by Leadership Gloucestershire from Concordat of October 2018 alongside Central Gloucestershire Growth Board and Rural Ambition Board
- Purpose challenged and now evolving.
- Impact of Great Western Powerhouse announcement
- Principally around connectivity transport and digital and role in key geographic area.
- Unusual membership including FEP, Stroud Local Strategic Partnership and MMC
- Next steps await agreed terms of reference. Come back to December Stakeholders to agree participation or not.

UK Industrial Strategy

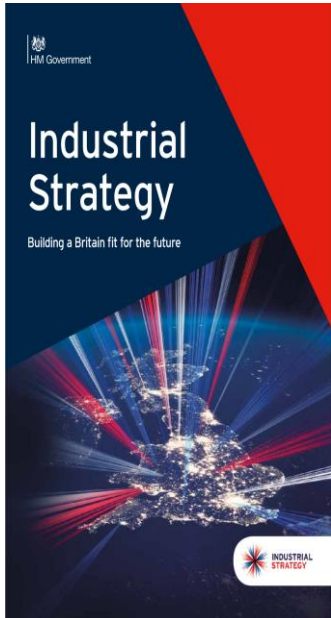
Issued November 2017 after Brexit vote



Aims include:

- High quality, well paid jobs turning innovation into products
- Stronger, fairer economy
- Developing skills, quality infrastructure and a predictable business environment building on UK strengths.
- Creating a focus on industries of the future
- Addressing the productivity challenge so all benefit from improvement and high levels of employment

UK Industrial Strategy Foreword



It is not enough just to look at the economy we have. We must make preparations for the economy we need to become.

These Grand Challenges are an invitation to business, academia and civil society to work together to innovate and develop new technologies and industries in areas of strategic importance to our country.

Putting the UK at the forefront of the artificial intelligence and data revolution; maximising the advantages for UK industry from the global shift to clean growth; being a world leader in shaping the future of mobility; and harnessing the power of innovation to help meet the needs of an ageing society.

To support evaluation and further understanding of the economy, we aim to make the UK the best understood major economy.

Grand Challenge 1

Growing the AI and Data-Driven Economy



We will put the UK at the forefront of the AI and data revolution.

The world is undergoing a technological revolution.

Artificial intelligence (AI) will transform the way we live and work (study and play)

This fourth industrial revolution is of a scale, speed and complexity that is unprecedented.

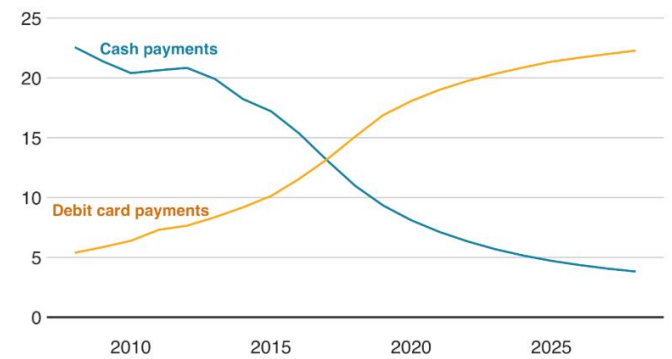
Artificial intelligence: technologies able to perform tasks that would otherwise require human intelligence, eg visual perception, speech recognition, translation

Machine learning: AI that allows computers to learn rapidly from large datasets without being explicitly programmed

Data-driven economy: a digitally connected economy that realises significant value from connected, largescale data that can be rapidly analysed by technology to generate insights and innovation

Cash versus debit cards

UK payments 2008-2018 and forecast to 2028 (billions)



Source: UK Finance

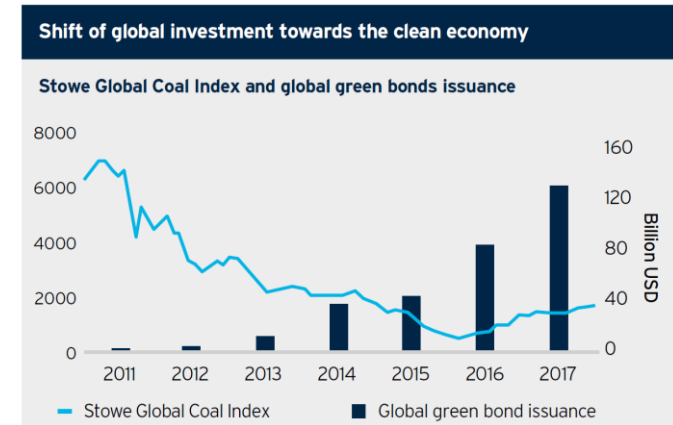


Grand Challenge 2

Clean Growth

We will maximise the advantages for UK industry from the global shift to clean growth – through leading the world in the development, manufacture and use of low carbon technologies, systems and services that cost less than high carbon alternatives.

- Paris Accord drives the economy
- Specific opportunities for Smart energy systems and Bio-economy
- Everyone to feel the benefits of clean growth, work to create a future where our cities benefit from cleaner air, our businesses from enhanced resource security and our countryside from regenerated natural capital.
- UK has world-leading capabilities in areas including electric vehicle manufacture, offshore wind, smart energy systems, sustainable construction, precision agriculture and green finance



Grand Challenge 3

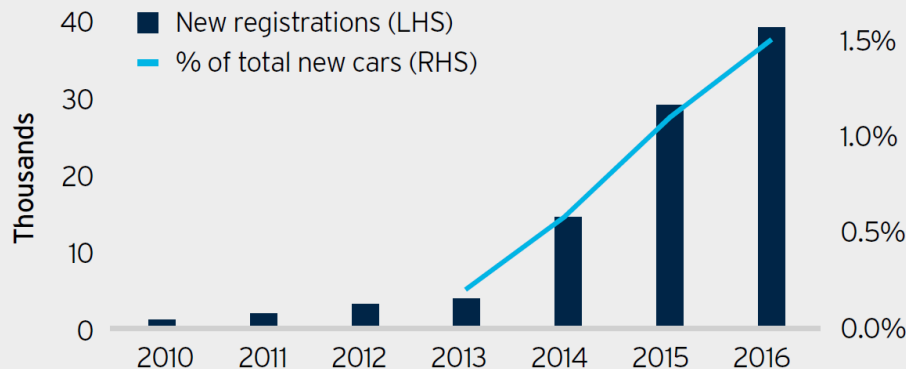
The Future of Mobility

We will become a world leader in shaping the future of mobility.

- Electrification and automation of cars
- Modernisation of rail
- Autonomous aerial and marine transport
- Mobility as a service
- UK highest percentage of population living in urban areas in OECD

UK electric car ownership has increased rapidly since 2010

New electric car registrations



The government wants to see fully self-driving cars on the UK roads by 2021



Grand Challenge 4

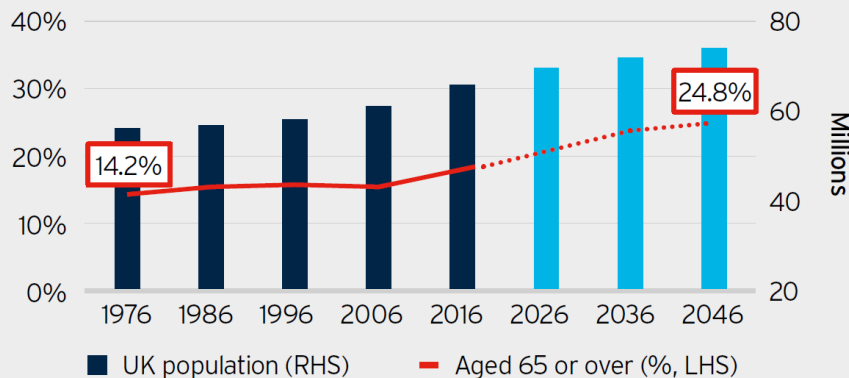
Ageing Society

We will harness the power of innovation to help meet the needs of an ageing society.

- Ageing populations will create new demands for technologies, products and services, including new care technologies, new housing models and innovative savings products for retirement.
- We have an obligation to help our older citizens lead independent, fulfilled lives, continuing to contribute to society

By 2046 almost 1 in 4 people will be 65 years old and over

UK population and proportion of population aged 65 and over



Ageing populations will create new demands for technologies, products and services



Grand Challenge 4

Ageing Society



We will :

- support new products and services for the growing global population of older people, meeting important social needs and realising the business opportunity for the UK
 - Lifestyle and independence support, new product launches support
- support sectors to adapt to a changing and ageing workforce
 - More flexible working, later retirement age
- leverage our health data to improve health outcomes and UK leadership in life sciences
 - Regional Digital Innovation Hubs, Early diagnostics
- support care providers to adapt their business models to changing demands, encouraging new models of care to develop and flourish
 - Green Paper Care and Support, use of emerging technology, use of Growth Hub network

So what does this mean for the Forest of Dean & your sector?

Get Involved



- Help to develop ideas for the services to be provided in the new hospital: <https://www.fodhealth.nhs.uk/engagement/>
- The new draft Gloucestershire Joint Health and Wellbeing Strategy has now been launched. The strategy sets out how we can achieve the vision that the county is a place where everyone can live well, be healthy and thrive. To give your views on the strategy, please see complete the online survey: <https://www.gloucestershire.gov.uk/health-and-wellbeing>
- In May 2019 the county council declared a 'climate emergency' and committed to holding a public consultation on climate change this summer. They are now ready to ask for feedback from residents in Gloucestershire on this important issue: <https://gloucestershirecc-climate-change-survey.questionpro.com/>

Thanks and Close



“Bad men need nothing more to compass their ends, than that good men should look on and do nothing” - John Stuart Mill

“You can't stay in your corner of the forest waiting for people to come to you. You have to go them sometimes” - A.A Milne

The District is acting and being heard with positive effects



**Next Meeting: 11th December 2019
9:30 to 11:30 at Gloucestershire
College, Forest of Dean Campus,
Cinderford, GL14 3FF**