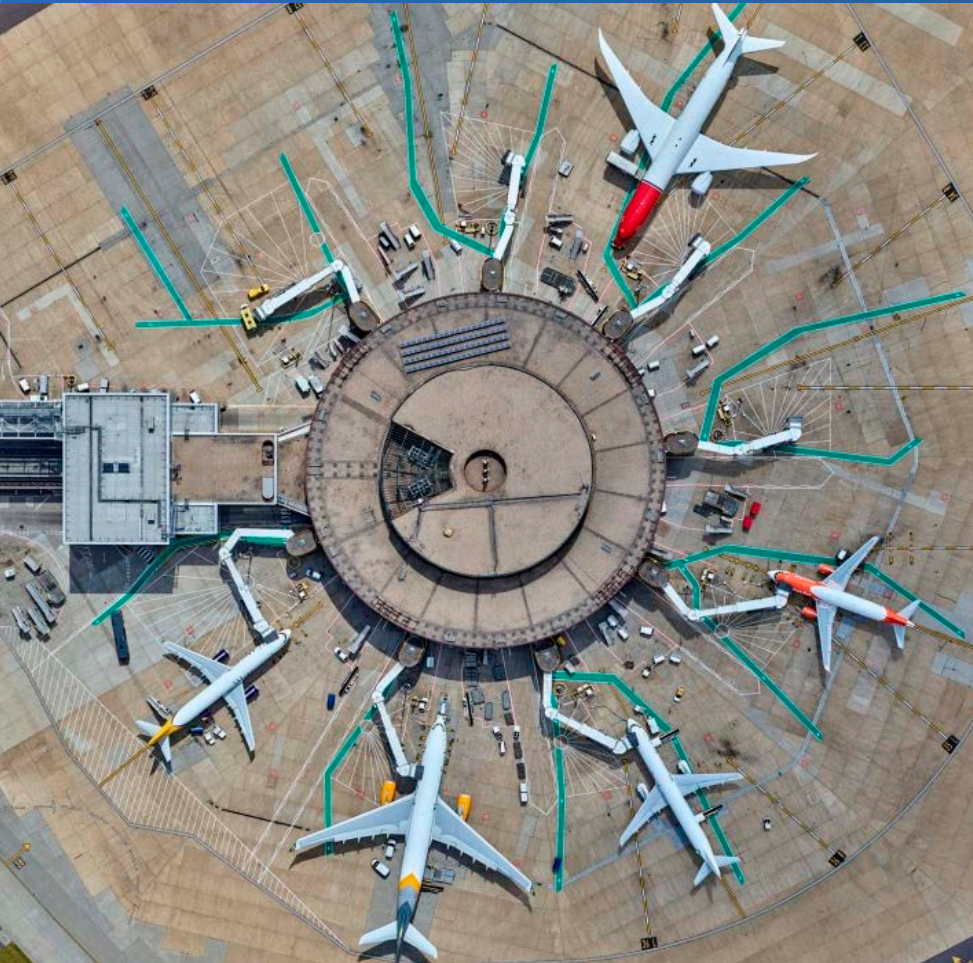




Coast to Capital LEP



76.8%

employment rate

20%

of SE economy

6th

Most prosperous region in the UK

1.9

million people

£61,000

Average GVA per employee

£48.5 bn

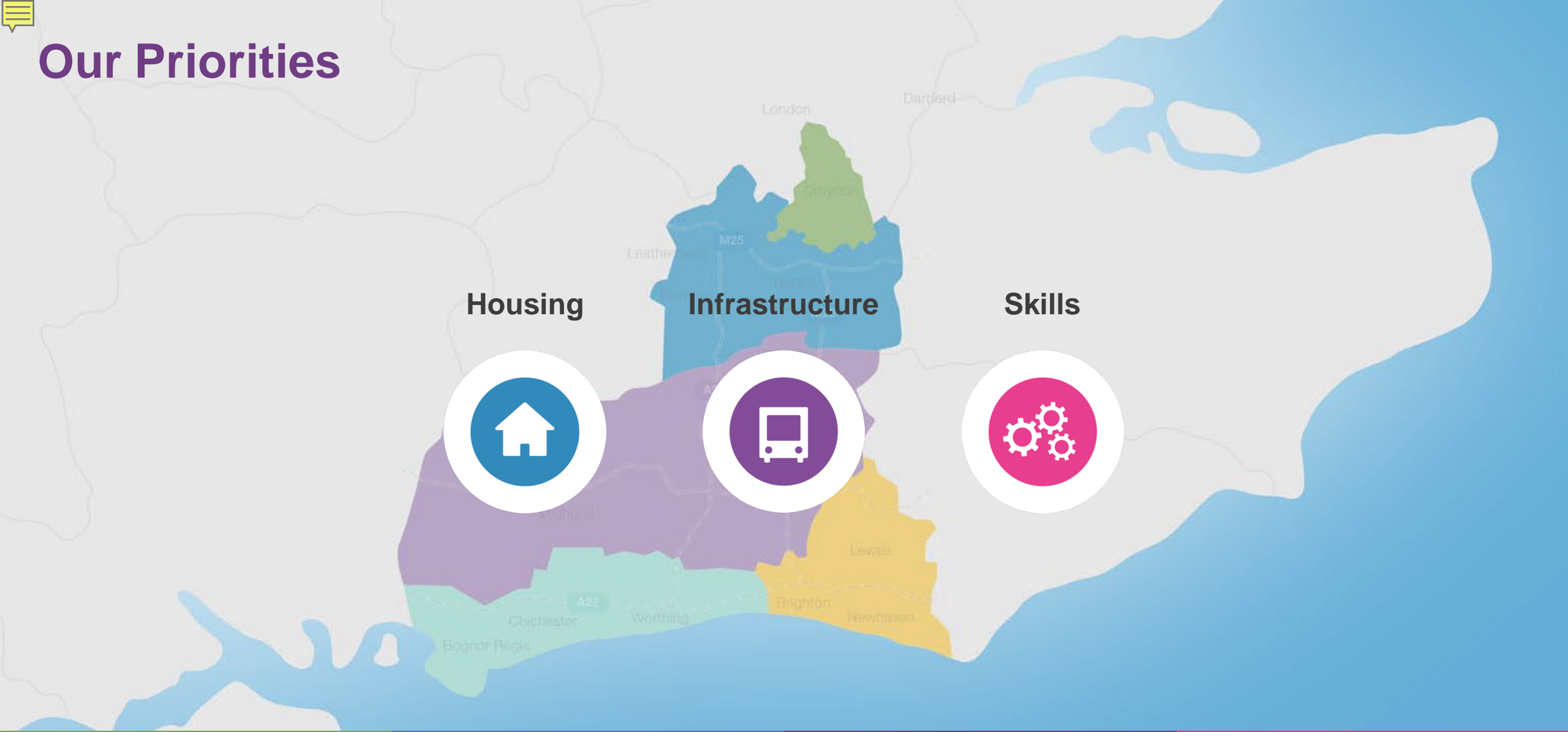
GVA

84,000

SME businesses in the area



Our Priorities



Priority Sectors

Sectors targeted for growth

- Advanced manufacturing and engineering
- Creative, digital and IT
- Environmental technologies**
- Financial and business services
- Health and life sciences

High employment sectors

- Health and Social Care
- Construction
- Visitor economy



Environmental Technologies

Sector definitions

The sector has been defined using 24 sub sectors (Level 2 markets). These are subdivided into three broad categories - Environmental, Renewable Energy and Low Carbon - the addition of each broadly mapping the evolution of the current LCEGS sector definition from its Environmental roots:

Environmental

- Air Pollution
- Contaminated Land
- Environmental Consultancy
- Environmental Monitoring
- Marine Pollution Control
- Noise & Vibration Control
- Recovery and Recycling
- Waste Management
- Water Supply and Waste Water Treatment

Renewable Energy

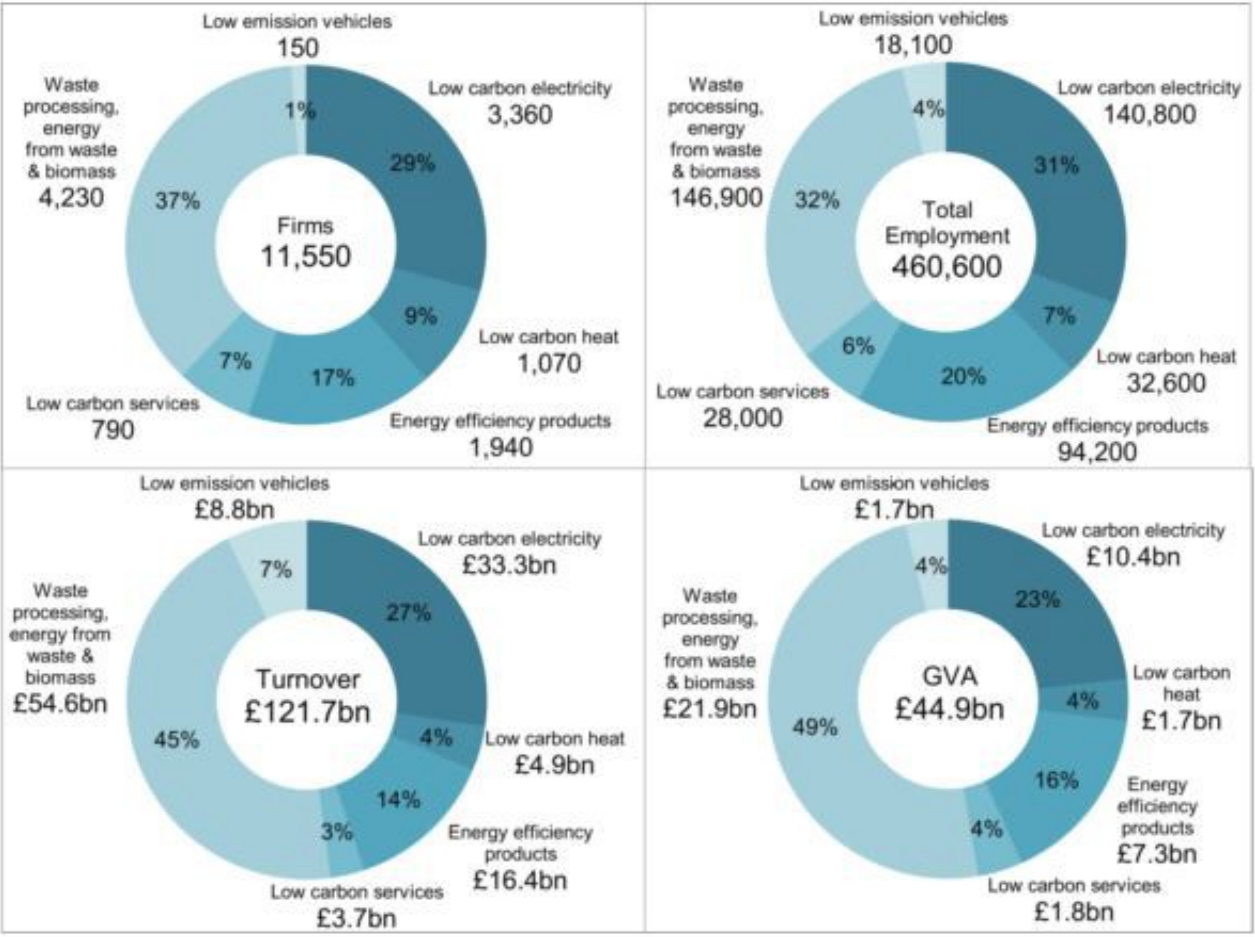
- Biomass
- Geothermal
- Hydro
- Photovoltaic
- Wave & Tidal
- Wind
- Renewable Consulting

Low Carbon

- Additional Energy Sources
- Alternative Fuel/ Vehicle
- Alternative Fuels
- Building Technologies
- Energy Management
- Carbon Capture & Storage
- Carbon Finance
- Nuclear Power

Environmental Technologies

The National Sector





Environmental Technologies

The Local Sector

BIS estimates for Coast to Capital 2011/12:

- 1,300 companies
- 23,900 employees
- £3.06bn sales

- 1.8% of the total business population
- 3.1% of total employees
- Sales 10th out of 39 LEPs



Environmental Technologies

Notable Organisations, Projects and Companies

- Green Growth Platform
- Sustainable Business Partnership
- Your Energy Sussex
- Community Energy South
- Brighton & Hove Energy Services Co-operative
- University Research Centres
- Rampion Wind Farm
- Newhaven Energy Recovery Facility
- WSCC Solar Farm
- Wood Fuel Initiative
- Saunders Energy
- Lightfoot LED
- Firefly Solar
- C-TEC
- Ricardo
- Ceres Power
- Mott MacDonald
- Circuitree
- BlackBox Energy
- Arun Construction

Environmental Technologies

Labour Market Characteristics

- ✔ The workforce is older than the wider economy and predominantly male
- ✔ A quarter of retirees by 2022 will be in science, engineering, technology professionals, and skilled metal, electrical, and electronic tradespeople
- ✔ 40% of workers have level 4+ qualification - compared with 34% in the wider economy – and is expected to rise to 50% by 2022
- ✔ Training is high – 75% of employers offer training compared to 66% in wider economy
- ✔ Workforce highly mobile – notably in high skilled occupations where wage premiums can be charged
- ✔ Highly competitive market for labour, both domestically and internationally



Environmental Technologies

Drivers of Growth

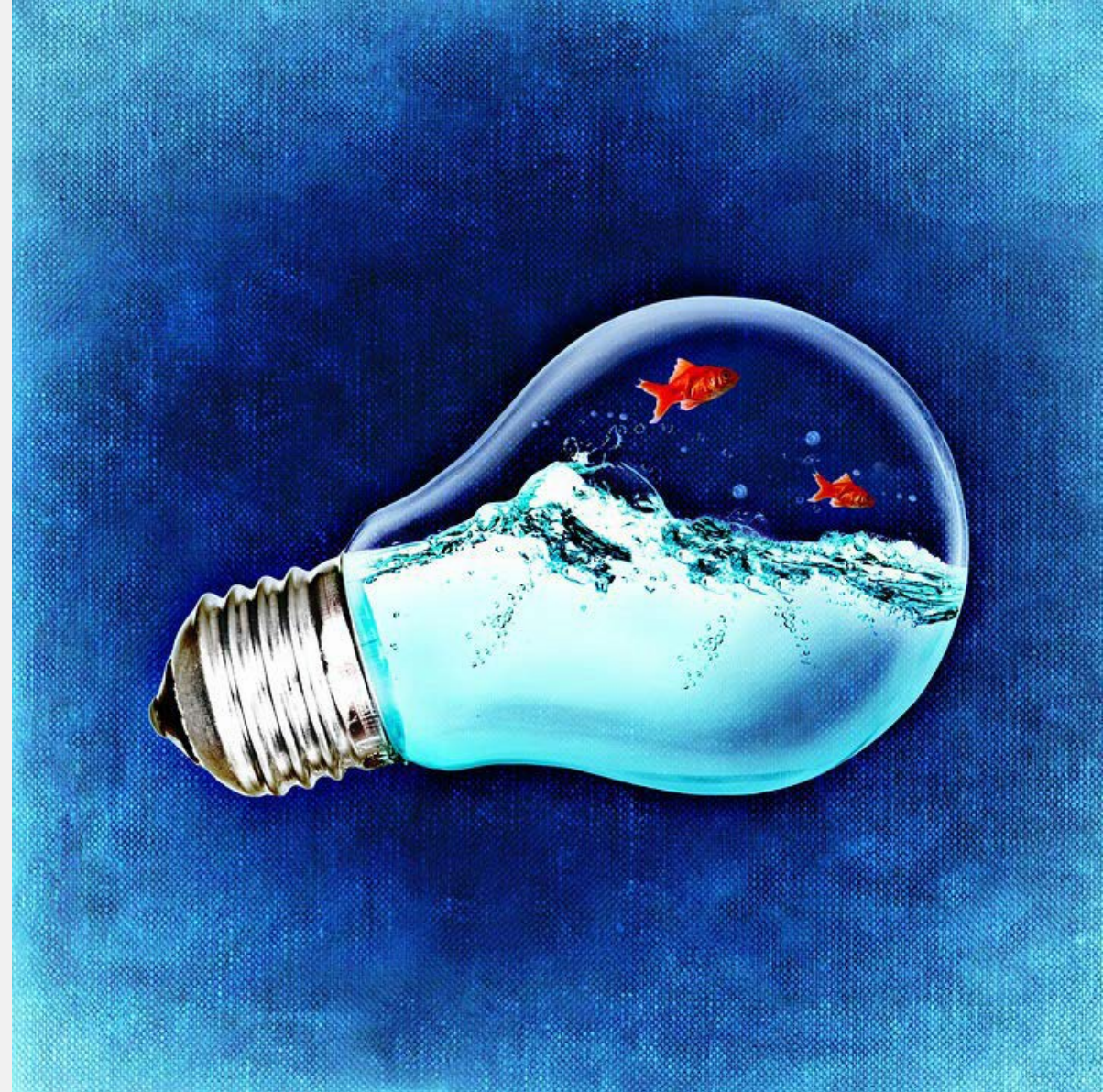
- Government policy helps shape the market, boost demand, and unlock funding for research and development
- International policy and agreements (such as the recent Paris agreement) also help shape the market and drive demand
- Investment in the sector is rising – half of 2013 energy investment in renewables (£7.3bn)
- Energy security is becoming a rising issue as uncertainty around oil supplies and prices vacillates
- Rising generation from renewables shows demand for low carbon energy and proof of its ability to make it to market
- Distributed energy systems will be required to effectively manage energy that is generated at a local level



Environmental Technologies

Barriers to Growth

- ❏ Inconsistent government policies are the key issue for the sector, recent changes to subsidies, the feed in tariff, and the Green Deal have created uncertainty in the sector and reduced appetite for investment
- ❏ Lack of internal investment funding both in technical innovations and manufacturing, but also in the service sector (not implementing energy efficiency programmes due to cost)
- ❏ Local opposition has effectively ended on-shore wind farming and make other infrastructure projects difficult
- ❏ Low oil prices relieves pressure on the need to switch to a low carbon economy
- ❏ There are issues around the supply of specific technical skills in the sector, which is exacerbated by competition for small pool of experienced employees and a lack of sector specific training and education



Environmental Technologies

Future Skills Needs

- Main skills needs revolve around STEM skills and the need for more engineers (particularly electrical engineers)
- Soft skills – communication, people management, customer service, team working
- Project management – budgeting, cost effectiveness, supply chain management
- Technology specific skills – smart meters, smart grids, IT skills and data analytics, installation
- Understanding of green policies will be required across the whole economy
- These will need to be supported by more renewables focussed training courses





Thank you for listening

