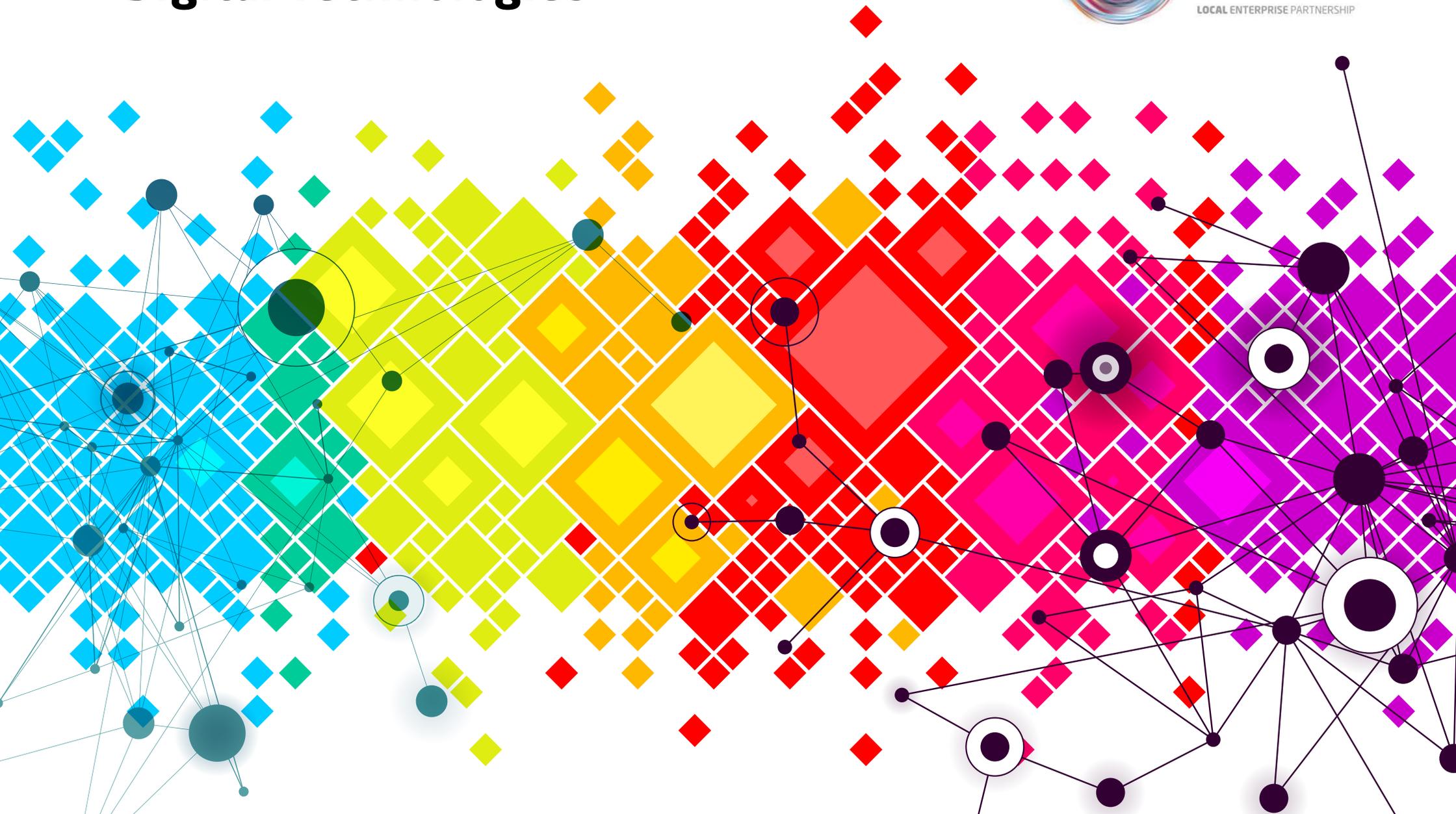


Sector Proposition: **Digital Technologies**



Contents

Section	Page
Introduction	2
Opportunity Thames Valley Berkshire	3
Location	4
Who's here	5-6
Thames Valley Cluster	7
International presence	8
Specialisms	9-15
Start-ups and SMEs	16-17
Relocation support	18
Talent	19-21

Section	Page
Future innovation and talent	22
Connectivity	23-24
Infrastructure development	25
Main business parks and incubator space	26
Living in Thames Valley Berkshire	27
Education in Thames Valley Berkshire	28
Cost of living	29
Case studies	30-31
Sources	32
References	33

Introduction

The technology sector in the UK is thriving, and nowhere more so than in Thames Valley Berkshire (TVB), with exports and employment in both UK and multinational technology firms continuing to grow. Given the breadth and depth of technology companies already established here, coupled with first class transport connectivity, Thames Valley Berkshire is uniquely placed as a global technology hub.

This document sets out the sub region's leadership position in the digital technologies space along with the opportunities for corporates, SMEs and start-ups choosing to locate here.

// Located at the heart of UK's traditional enterprise and science tech belt, Berkshire has a strong history in digital technology //

Tech Nation 2015, Tech City UK

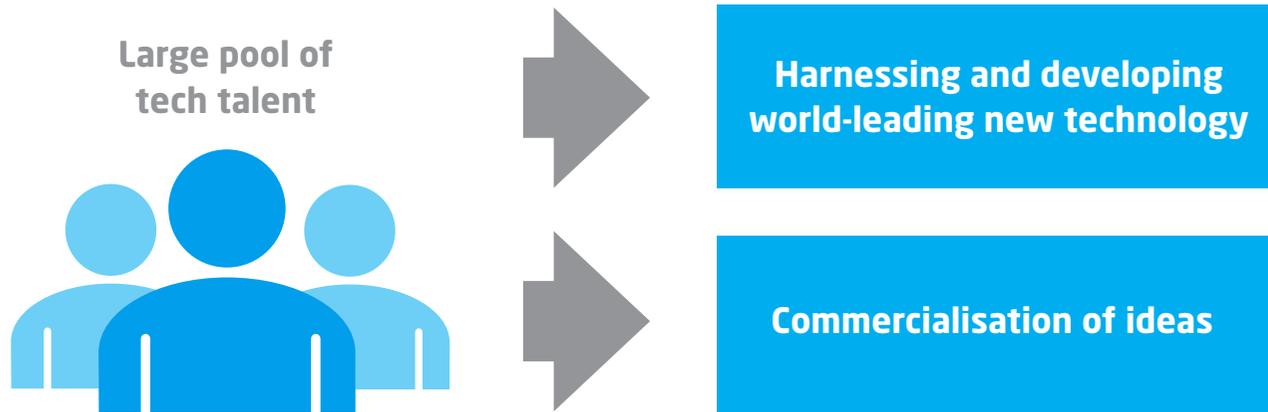
Opportunity Thames Valley Berkshire

The Thames Valley Berkshire Powerhouse

Thames Valley Berkshire is an economic powerhouse of enormous importance to the UK. There are three distinctive and inter-related features of the local economy: the importance of technology based (tech-based) activity; the significance of internationalisation; and the role of corporates. All three are related to the area's strong relationship with London and close proximity to Heathrow Airport.

TVB's strong mix of sector clusters and highly skilled workforce provide opportunities for cross-sector collaboration and knowledge transfer.

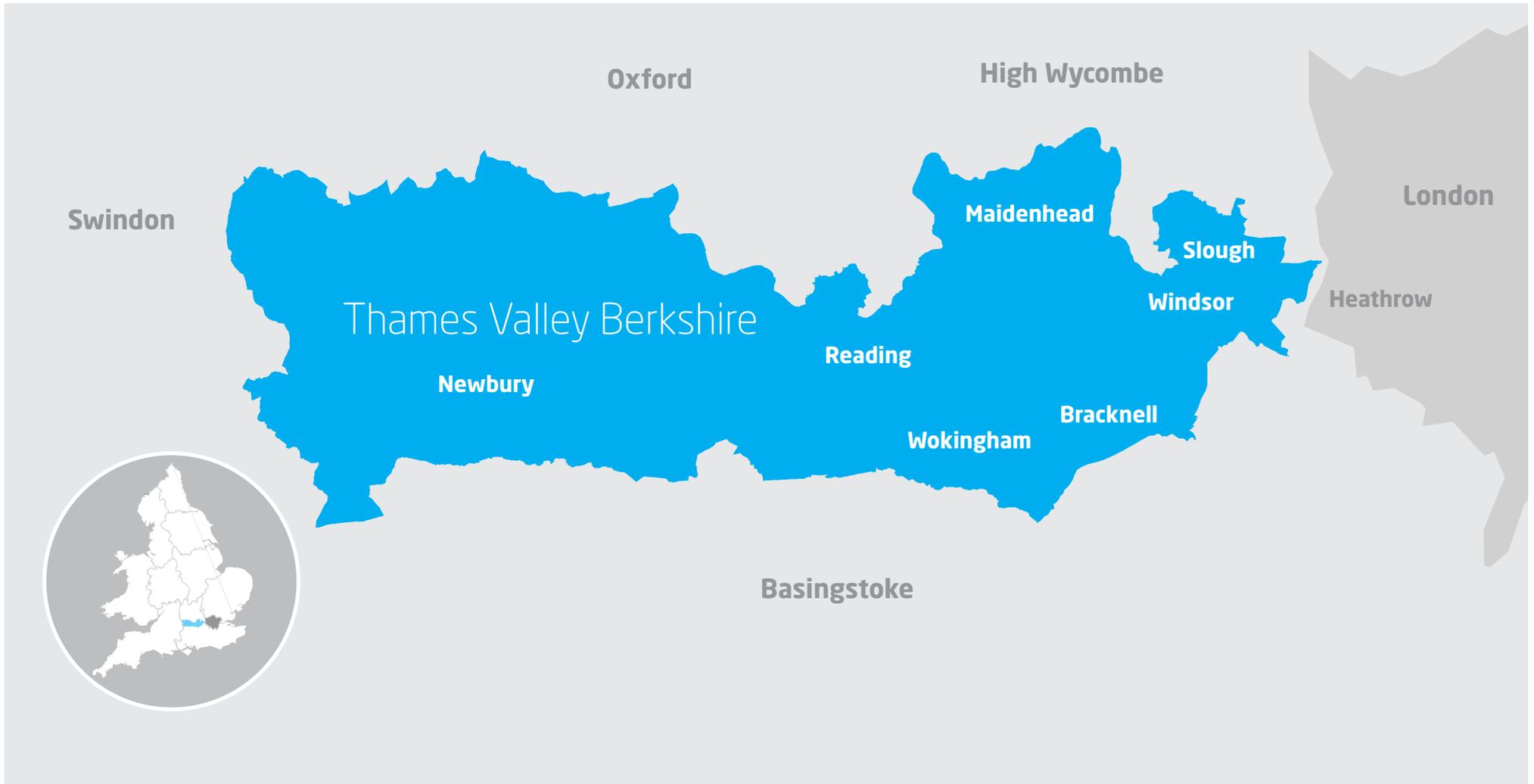
Skilled workforce



Quick reference

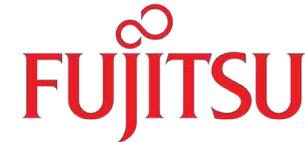
- At the heart of Europe's largest tech cluster
- Rich in established global businesses
- Strong start-up and SME ecosystem
- Close proximity to Heathrow Airport

Location



Who's here?

Computer software / services



Telecommunications



Who's here?

Data centres



Award winning and high growth SMEs and start-ups



Thames Valley Cluster

No. 1 tech cluster in Europe

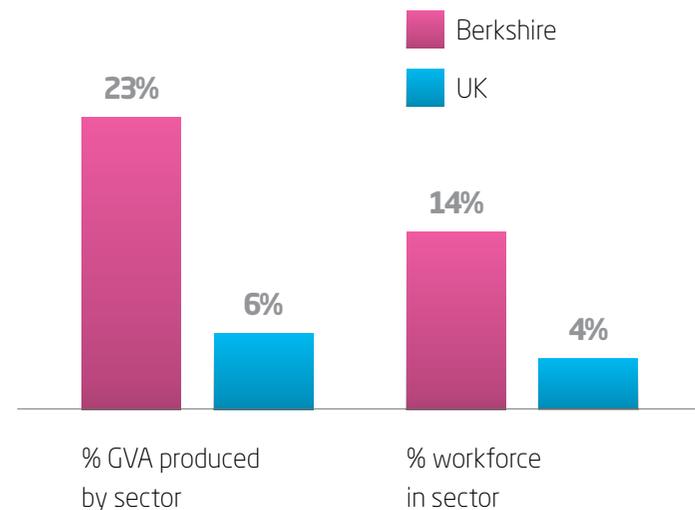
Over the last five years there has been a 23% increase in the number of tech companies in Thames Valley Berkshire, with the total now exceeding 6,300. Four of the top five areas of the UK with the highest concentration of tech enterprises are located in TVB, with Reading topping the list as the UK's number 1 local tech cluster (KPMG, 2014). The proportion of tech enterprises within the local business population in:

- Reading is three times the UK average
- Wokingham is 2.7 times the UK average
- Slough is 2.6 times the UK average
- Bracknell Forest is 2.4 times the UK average

Furthermore, TVB borders London and other strong tech locations, such as Surrey, Buckinghamshire, Oxford and Hampshire.

The Thames Valley Berkshire economy

Tech companies are the driving force behind TVB having one of the most successful local economies in the UK. Berkshire has the second highest performing economy in England (after London) and has the most productive workforce. It is the only area of the UK with higher productivity levels than the US. The Digital Technologies sector accounts for nearly a quarter (23%) of TVB's economic output (Gross Value Added – GVA) compared with just 6% nationally. Furthermore, 14% of the TVB workforce are in the Digital Technologies sector, compared with just 4% nationally.



Quick reference

- Over 6,300 tech companies based in TVB
- 23% increase in tech businesses over the last five years
- 14% of the local workforce work in the digital technologies sector (UK average = 4%)
- Four of the top five local tech clusters in the UK are based in the sub region
- The only area of the UK with higher productivity levels than the US

International presence

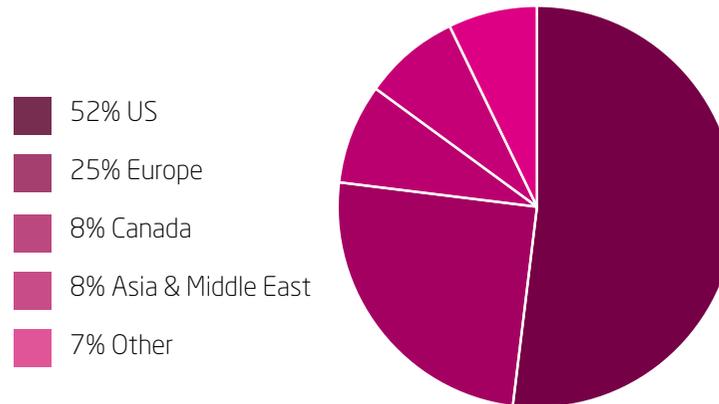
Global centre

Thames Valley Berkshire has a high concentration of foreign-owned companies which provide jobs for a quarter of the subregion's private sector workforce. There are approximately 450 foreign-owned companies operating in the tech sector in TVB, of which over two-thirds are North American owned and a quarter are European-owned. There are clusters of companies from different countries across the subregion. For example Bracknell is home to a cluster of Japanese-owned companies.

In recent years, an increasing amount of inward investment has come from Asia. Over the last two years, just under half of all Berkshire's tech inward investors were from the Asia Pacific area, mainly India and China. More information on why recent investors chose Thames Valley Berkshire can be downloaded at the Thames Valley Inward Investment Portal. Please see end of the document for details.



Foreign owned tech companies in Berkshire



Quick reference

- Highest concentration of foreign-owned companies in the UK with approx. 450 based in TVB
- 1 in 4 private sector workers work in foreign owned companies

Thames Valley Berkshire's Specialisms



Software and IT Services



Telecommunications



Cyber Security



Data Centres and Cloud Computing



Big Data



Machine to Machine / Internet of Things



Specialism 1: Software and IT Services

Software companies

Thames Valley Berkshire is home to around 500 software companies which develop software for devices from smartphones and tablets to TV set top boxes. 11 of the world's top 15 software companies (by revenue) such as Microsoft, Oracle, SAP, Ericsson, Symantec, HP, Adobe, CA Technologies, Fujitsu, VMware and Hitachi, are located in the sub region. The remaining four—IBM, EMC, Salesforce and SAS—have offices within an hour's drive.

TVB has the largest number of software companies in the UK outside of London, with many using Thames Valley Berkshire as a European or UK headquarter base for technical and customer support, development and customisation, or sales and marketing functions.

Thames Valley Berkshire also has the largest number of computer software sales companies outside of London, with 54 companies engaged in this activity. The sub regional further has the largest number of computer systems sales companies in the UK, with 46 companies engaged in this activity.

Tech specialists

Whilst some of the major software companies purely have sales offices locally and undertake software development work elsewhere, a great deal of software development and system design is carried out by Berkshire's 51,000 tech specialists.

Quick reference

- Home to around 500 software companies
- 11 of the world's top 15 software companies (by revenue) located in TVB
- 51,000 tech specialists



Specialism 2: Telecommunications

Telecommunication companies

The Thames Valley is one of the world's most successful locations for the telecommunications industry. TVB is home to companies involved in all aspects of the industry, from the provision of services to the manufacturing of telecommunications equipment. Over 600 telcos have a base (mostly UK or European HQs) in TVB, including industry giants: Vodafone, O2, Ericsson, BT, LG, Blackberry, Huawei and Panasonic, plus a large number of innovative telcos such as Gamma and Airway Solutions.

Eco-system

The University of Reading works with industry partners on research in the areas of communications, embedded systems and signals & systems and Sharp, based in Bracknell, has one of only two UK Bluetooth testing facilities.

The 5G Innovation Centre (5GIC) at the University of Surrey (an hour from central Berkshire) is the UK's only research centre dedicated to the next generation of mobile communications.

Quick reference

- Over 600 telcos are based in TVB
- University of Reading works with industry partners on research in the areas of communications, embedded systems and signals & systems



Specialism 3: Cyber Security

Cyber security companies

7 of the world's top 20 cyber security companies are located in Thames Valley Berkshire, whilst global leaders Sophos and Kaspersky are located nearby. TVB-based companies include:

- Symantec Corporation
- Cisco Systems Inc.
- Dell Inc.
- Hewlett Packard Company
- Intel Corporation
- L-3 Communications Holdings
- Thales Group

FireEye, the number 1 'hottest' cyber security company in the world, has its EMEA HQ in Reading. Clearswift, one of the UK's top 5 'hottest' cyber security companies is based in Theale. There is also a significant presence of cyber security companies in the neighbouring sub region, Hampshire.

Ecosystem

There are numerous networking groups in TVB, for example, 'Hewlett-Packard Colloquium on Information Security' holds an annual networking event for academia, industry and government at Royal Holloway, University of London. The 'Thames Valley Cyber Security Sector Cluster Networking Group' aids collaboration between SME cyber security companies in the Thames Valley.

Three Academic Centres of Excellence in Cyber Security Research (ACEs-CSR) are located within close proximity to Thames Valley Berkshire:

- University of Oxford
- University of Surrey
- Royal Holloway, University of London

These Centres collaborate with industry and government, and provide top quality graduates and Doctoral opportunities.

The Berkshire-based Intelligent Systems Research Laboratory at the University of Reading undertakes research and innovation in cyber security technology areas including: Privacy-by-Co-Design, Trustworthy Internet of Things, Machine Learning and Video-Analytics. Furthermore, Thales Group has its UK research & technology facility just outside Reading.

Quick reference

- 7 of the world's top 20 cyber security companies are located in TVB



Specialism 4: Data Centres and Cloud Computing

Data centres

Key players in the data centre sector operating in Thames Valley Berkshire include: SEGRO, EQUINIX, Infinity, Network-i, Pulsant, Salesforce, Amatis Networks, Easynet, IO and CentriLogic.

Slough Trading Estate is a major datacentre hub due to its proximity to London with excellent power supply, fibre-optic cables and high security. In 2014 there were over 20 data centres on its site owned by SEGRO. SEGRO is one of the leading providers of datacentre facilities in the UK and boasts circa 2 million sq ft of accommodation and fibre-optic connections to Europe and the US.

Slough Trading Estate is a high security environment, outside of the Central London risk zone, the Thames Valley flood plains and flight paths. It has industry-leading security, strong enough for the US Government.

Cloud computing

Thames Valley Berkshire has the largest number of cloud computing companies and the largest number of Software as a Service (SaaS) companies outside of London. Leading cloud computing companies based in TVB include: Adobe, HP, Microsoft, VMware, UNIT4, Snow, NetSuite, Ingram Micro, Easynet, Concorde, Computacentre, cloudBuy and claranet.

Three TVB-based cloud computing companies (Pulsant, Cloud Distribution and Content Guru) feature on the Business Magazine's Southern Tech list of the top independent IT companies in the South of England.

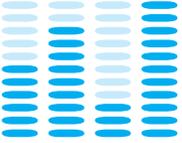
The University of Oxford, less than an hour's drive from the Berkshire border, is one of the UK's leading universities for cloud research.

Quick reference

- The sub region has a high concentration of data centres with Slough being a data centre mega cluster

// The growth of cloud computing is being driven by both public and private sector interest. This is in turn driving data centre growth. Opportunities exist in the two growing markets //

UK Trade and Investment



Specialism 5: Big Data

Big data companies

Thames Valley Berkshire is home to leading big data companies from all parts of the 'big data landscape'. Some examples being:

- Infrastructure – Microsoft, Kognito, MapR, Amazon, Push Technology
- Analytics – HP, Datasift, Datawatch, QlikView, Logi Analytics, Exonar
- Cross Infrastructure / Analytics – Microsoft, SAP, Talend, HP
- Open source – Oracle
- Operational intelligence – AppDynamics, Vitria, Informatica

In addition, world-leading business analytics software company SAS, has its UK Headquarters on the Berkshire border in Marlow.

Ecosystem

The University of Reading undertakes research in Big Data Analytics. Current research aims to develop new algorithms and software tools that help to turn the hidden information of rough data into explicit, interesting and actionable knowledge. The University also works closely with TRL Ltd on Road Infrastructure Analytics.

A new multi-million-pound world-class environmental science 'big data' research and analysis centre has opened at the University of Reading. It will unlock huge environmental datasets and computational modelling, satellite and earth observation research, turning them into commercially viable ideas.

Huawei has recently collaborated with Imperial College to create a new data centre science laboratory.

Finally, the Thames Valley Big Data Meetup group for TVB based big data professionals meets every two months to exchange ideas.

Quick reference

- A diverse mix of big data companies are located in and near TVB
- The University of Reading is at the forefront of big data research and analysis



Specialism 6: Machine to Machine / Internet of Things

M2M/IoT companies

Many of the world's top Machine to Machine (M2M) companies have operations in Thames Valley Berkshire, most notably Vodafone, O2, Three, Verizon, Aeris, SAP, Oracle, Cisco, Ericsson, Machina Research and Sharp. In 2014, Vodafone retained the number 1 spot in Machina Research's assessment of global M2M capabilities.

O2, Three and Vodafone all have R&D in the area and are actively evolving their M2M data services, targeting the Internet of Things (IoT) opportunity. Companies such as Symantec, Huawei and Fujitsu are playing key roles in the development of the UK's first Smart Cities (London, Milton Keynes and Bristol), all of which are located within two hours' drive of the sub region.

Ecosystem

The 'Thames Valley Internet of Things' networking group has over 500 members, with a similar group meeting regularly in Oxfordshire. The ConnectTVT Lab based in Reading aims to help more commercial IoT products to come to market with the support of a software and hardware fusion space, an open device lab for mobile app testing on real life and a 3D printing zone.

Quick reference

- Many world-leading M2M / IoT companies have bases in Berkshire
- Vodafone is the number 1 company for global M2M capabilities

Start-ups and SMEs

Start-ups and growth SMEs

There are around 6,300 small tech companies in TVB, of which approximately 500 started-up in Thames Valley Berkshire in 2014. In the last five years there has been a 24% increase in small (employing less than 50 people) tech companies in Berkshire.

Award-winning and high growth local tech start-ups and SMEs include: Volume, Ntegra, Redwood Technologies, Invenio, Display-data, Fairsail, Rawnnet, Global Personals, Datasift, Cloud Distribution, Airbyte, Bullitt and Clearswift.

Ecosystem

ConnectTVT provides support to tech start-ups, innovators, creatives, freelancers and developers. ConnectTVT's innovation hub GROW@GreenPark provides collaboration space for technology entrepreneurs to get together. It provides desk space, networking, learning and access to mentors, investors, marketers, PR and HR specialists. ConnectTVT also hosts a large number of regular workshops and networking events with high profile speakers.

The Dell Centre for Entrepreneurs, based in Bracknell, provides private sector support to the UK start-up community.

Quick reference

- A large and growing pool of small tech companies are based in TVB
- Strong support for start-ups and SMEs is available

// It's important that we maintain and grow Tech Valley's leading position //

Sean Taylor - Co-founder and Managing Director Redwood Technologies Ltd and Content Guru Ltd

Start-ups and SMEs

Local support for growth

A one-stop-shop for business support in TVB comes from the Berkshire Business Growth Hub, which aims to enhance and accelerate business performance, help more businesses to take advantage of national support programmes, increase jobs and raise levels of exporting.

The Enterprise Centre at the University of Reading provides innovative and growth-orientated businesses with ambition to grow, and direct access to the University's research and enterprise expertise. In addition, the University's Knowledge Transfer Centre leads one of the most successful Knowledge Transfer Partnerships in the UK. It provides innovative support and training to 'smart' businesses moving into or expanding within the area.

Thames Valley International Technology Conference, supported and hosted by Microsoft and Thames Valley Chamber of Commerce (TVCC), provides up-to-date insight and networking opportunities for both corporates, SMEs and start-ups.

Access to finance

The Thames Valley Berkshire Funding Escalator provides loans and equity to support early-stage SMEs and offers finance to those that have the potential to deliver growth but can't access finance from traditional sources. The Funding Escalator comprises a series of four repayable funds:

- Thames Valley Berkshire Commercialisation Loan Scheme
- Thames Valley Berkshire Expansion Loan Scheme
- Thames Valley Berkshire Trade Finance Loan Scheme
- Thames Valley Berkshire Growth Fund (part equity)

The FSE Angel Club runs events in Camberley and London, which are open to companies based in TVB. This is a network of registered angel investors looking to make an impact on dynamic, small companies who require investment to take the next step forward.



Relocation support

Soft landing

The Thames Valley Chamber of Commerce has extensive experience of foreign direct investment and, through its work with UK Trade & Investment (UKTI), Local Authorities, the Thames Valley Berkshire LEP and Thames Valley professional service providers, can provide advice and relocation support: www.thamesvalley.co.uk/

The TVCC soft-landing and local partners programme provides support to around 40 international technology companies each year.

It includes:

- A one stop shop for expertise in financial and legal issues, and assistance in recruiting the right professionals and interim managers to grow a business.
- Tried and tested advice on commercial office locations, serviced offices and residential property for company executives and relocating ex-pats.

Local Authority advice and support:

Bracknell Forest - bracknell-forest.gov.uk/inwardinvestment

Reading - investinreading.co.uk

Slough - sloughmeansbusiness.co.uk

West Berkshire - westberks.gov.uk/businesssupport

Windsor and Maidenhead - rbwm.gov.uk/web/business_investing.htm

Wokingham - wokingham.gov.uk/business-licensing

Professional services

Reading is a centre for business and financial services, with all major national and regional firms represented. Many local recruitment companies specialise in tech and sales roles.

Talent

Talent pool

Thames Valley Berkshire has a highly skilled and loyal workforce, which is the most productive workforce in the UK.

Tech, sales and managerial workforce

With the vast range of tech companies already established in the area, there is no shortage of talent. Nearly three times as many people in TVB's workforce work in IT and telecommunications roles and nearly twice as many people work in sales and marketing professional roles than the national average. A higher proportion of the TVB workforce also work in senior managerial roles than the national average.

Job roles	Berkshire	
	Workforce size	% of total workforce
Managers and directors	57,000	13%
Tech specialists (including...)	51,000	10%
...Programmers and software development professionals	11,700	2%
...IT specialist managers	8,500	2%
...IT business analysts, architects and system designers	4,100	2%
...IT specialist managers	2,800	1%
...Other information and communication professionals	11,700	2%
...IT specialist managers	8,700	2%
Sales, marketing & related professionals	51,000	5%

Highly skilled and productive workforce

**Highly
qualified
workforce**

42%
of the workforce
with a degree
(or higher)
which is 12%
higher than
the national
average

**Net inflow
of 22-30
year olds**

**Net inflow of
people in the
post university/
pre-family age -
bringing ideas
and experience
often gained from
working in
London-based
companies**

**Agile
but loyal
workforce**

43%
of the
workforce have
been with their
current employer
for 2-10 years

**The UK's
most productive
workforce**

**The Thames
Valley Berkshire
workforce have
the highest
output per hour
worked of all
areas of the UK**

(in terms of Gross
Value Added - GVA -
per hour worked)

**High proportion
of workforce in
high-skill roles**

35%
of the
workforce
are managers or
professionals -
7% higher than
the national
average

Talent

University graduates

The University of Reading is ranked in the top 1% of the world's universities, according to The Times Higher Education World University Rankings 2013-14. In 2013/14 5,320 students graduated from the University of Reading. This included 2,450 postgraduates and 2,680 first graduates. The University brings together a unique mix of expertise in information technology, computer science, cybernetics and electronic engineering. Many degree courses include placement years in industry and many companies work directly with the University to recruit the best graduates. The University's Industrial Advisory Board (IAB) includes members from companies such as Thales, Sony, AWE, National Grid and IBM.

66% of graduates from Thames Valley Berkshire return to/stay in the area after graduating.

The University of Oxford and Imperial College London (less than 10 miles to the east) – are intellectual powerhouses of global standing. In addition, the plethora of other London-based universities (including Brunel and Surrey) are all within 25 miles.

College graduates

There are five Further Education colleges in TVB, plus private training organisations supporting IT Apprentices. UTC Reading is a University Technical College that delivers computer science and engineering excellence for 14-19 year olds within a 15 mile radius of Reading. Industry partners include Cisco and Microsoft. It recently became the first UTC in the country to be graded 'outstanding'.

Quick reference

- The University of Reading is in the world's top 1%
- 66% of graduates from Thames Valley Berkshire return to/stay in the area after graduating
- Berkshire has five Further Education colleges and one University Technical College

// We are able to source extremely talented local individuals to create the cutting edge work that our clients expect. The future is buoyant and we know that Berkshire is the best place for us to be //

Redbox Mobile Ltd

Future innovation and talent

New innovation space

The University of Reading's Thames Valley Science Park will benefit technology-led companies by offering a strategic location close to London and Heathrow, and access to the high-quality research and graduate support provided by the University. It will create 170,000 sq ft of specialist business space between 2016 and 2018.

Increased talent supply

Thames Valley Berkshire LEP is committed to help increase the supply of people with science, technology, engineering and maths skills for the Berkshire economy and is funding the creation of new Solutions Labs within Further Education Colleges to equip more young people with these skills.

Crossrail is also likely to improve access to tech talent for Berkshire businesses, reducing travel times from Tech City to Slough and Maidenhead to less than an hour.

Travel time from Tech City

	Pre-Crossrail	Post-Crossrail	Saving
Slough	78 mins	49 mins	29 mins
Maidenhead	70 mins	58 mins	12 mins
Twyford	83 mins	65 mins	18 mins
Reading	79 mins	71 mins	8 mins

// The University is proud to be part of its local community, contributing to its economic prosperity and general wellbeing. //

Sir David Bell, Vice-Chancellor of the University of Reading



Connectivity

Access to markets

Thames Valley Berkshire's close proximity to London and Heathrow Airport provides easy access to customers, supply chains and financial markets. Heathrow, the world's third busiest airport, provides access to 185 international destinations, including 23 cities in the US.

TVB's excellent links to London include the M4 motorway, the Great Western Mainline to Paddington and the Reading to Waterloo Mainline. Access to Heathrow and mainland Europe makes TVB an ideal location for those wishing to export. Furthermore, it is easy to access most major UK cities from the sub region, either by road or rail.

All three of Britain's first 'Smart Cities' (London, Milton Keynes and Bristol) are within a two hour drive of TVB, providing a potential market opportunity.

Digital

The sub region has received government funding to increase its superfast broadband coverage to 95% or higher by the end of 2017.

Along with organisations such as BT, Fujitsu, Samsung, Vodafone and the BBC, Thames Valley Berkshire LEP is investing in 5G technologies under development at the University of Surrey. The aim is to connect 5G to smart specialisation such as mobile applications, computer games, video and music content providers. 5G will enhance Thames Valley Berkshire's reputation as an economic powerhouse in the digital future and will develop potential content supply chain opportunities around new technologies.

Quick reference

- 40 minutes from central Berkshire to London and Heathrow Airport
- Superfast Broadband coverage increasing to 95% or higher by the end of 2017

// With the proximity of Heathrow Airport, its high-speed connection into Paddington and the building of Cross-Rail, Thames Valley / Berkshire provides all the essentials for a hyper-mobile, international company like Microsoft. //

Microsoft

Connectivity

Train Travel

Location	London	Oxford	Milton Keynes	Bristol	Manchester	Birmingham	Heathrow	Gatwick
Slough	16 mins	45 mins	1hr 33	1hr 30	3hr 17	2hr 26	41 mins	1hr 36
Reading	25 mins	12 mins	1hr 42	54 mins	3hr 18	2hr 06	1hr 2	1hr 16
Windsor	26 mins	58 mins	1hr 46	1hr 46	3hr 28	2hr 39	55 mins	2hr 5
Maidenhead	31 mins	54 mins	1hr 38	1hr 31	3hr 35	2hr 28	48 mins	2hr
Newbury	43 mins	56 mins	2hr 02	1hr 43	3hr 52	2hr 37	1hr 48	1hr 54
Wokingham	56 mins	50 mins	2hr 06	1hr 18	3hr 44	2hr 26	1hr 34	1hr 7
Bracknell	1hr 00	58 mins	2hr 13	1hr 28	3hr 59	2hr 59	1hr 28	1hr 30

// From 2018 new trains and the electrification of the Great Western Mainline will reduce train journey times //

Drive times

Location	London	Oxford	Milton Keynes	Bristol	Manchester	Birmingham	Heathrow	Gatwick
Slough	49 min	55 mins	1hr 08	1hr 41	3hr 30	1hr 57	15 min	57 min
Reading	1hr 09	54 min	1hr 30	1hr 26	3hr 41	2hr 08	38 min	1hr 18
Windsor	19 min	1hr 00	1hr 13	1hr 43	3hr 35	2hr 03	19 min	1hr 01
Maidenhead	57 min	50 min	1hr 16	1hr 38	3hr 26	1hr 53	24 min	1hr 05
Newbury	1hr 30	39 min	1hr 39	1hr 13	3hr 28	1hr 55	56 min	1hr 37
Wokingham	1hr 10	1hr 01	1hr 30	1hr 32	3hr 38	2hr 05	33 min	1hr 10
Bracknell	1hr 07	1hr 01	1hr 26	1hr 34	3hr 39	2hr 07	32 min	1hr 04

Infrastructure development

Current investment

Outline planning consent has been granted for the new Thames Valley Science Park adjacent to the M4 motorway south of Reading. The first building is scheduled for completion in 2017. Infrastructure schemes underway in Thames Valley Berkshire include:

- Crossrail
- M4 Smart Motorway
- Superfast Broadband
- Airport Infrastructure Projects (Heathrow)
- Bracknell town centre regeneration and infrastructure
- Heart of Slough
- Reading rail station and Station Quarter
- Maidenhead town centre
- New residential developments are underway across TVB



Future investment / impact

Investment in infrastructure unlocks growth and future prosperity. With this, numerous projects are underway including Crossrail which will stretch from Reading in the west, across to Shenfield and Abbey Wood in the east. The new railway will improve journey times to London's West End. Full service will commence in 2019.

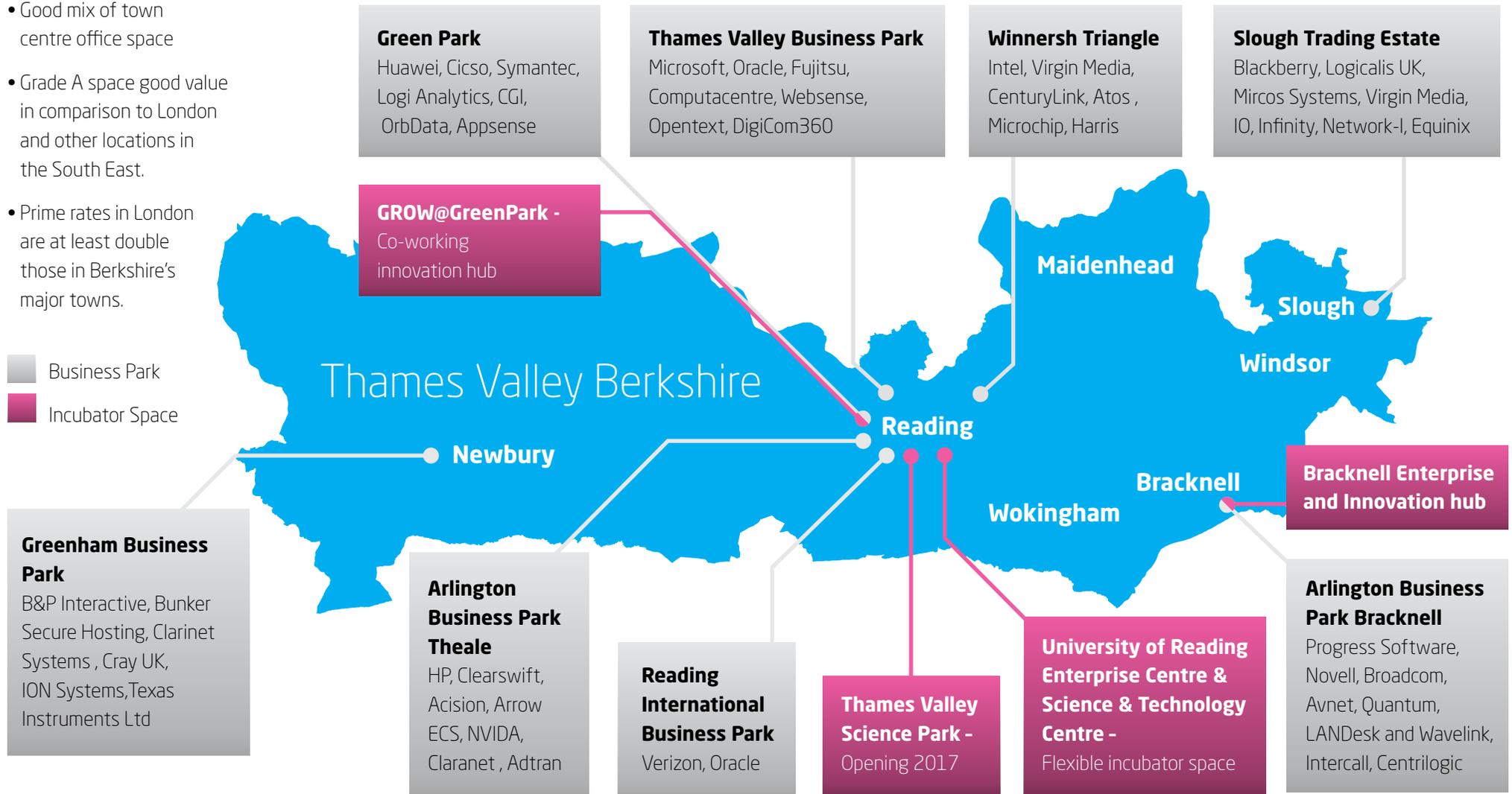
The Highways Agency is developing the M4 into a "smart motorway" between junctions 3 and 12. It will use cameras, information signs and signals to relieve congestion and improve journey times.

Western Rail Link to Heathrow will deliver direct rail services to Heathrow from Reading via Maidenhead and Slough. Slough will have a 6 minute journey time to Heathrow, Maidenhead 14 minutes and Reading 26 minutes. Plans have recently been approved for the new Green Park railway station on the Reading to Basingstoke line. Construction work is due to begin in October 2016.

Main Business Parks and Incubator Space

- Good mix of town centre office space
- Grade A space good value in comparison to London and other locations in the South East.
- Prime rates in London are at least double those in Berkshire's major towns.

Business Park
 Incubator Space



Living in Thames Valley Berkshire

Rich history, culture and leisure

The Thames Valley Berkshire provides a stunning backdrop to an abundance of visitor attractions, sporting events and Michelin star restaurants.

The Thames Valley Berkshire is home to the 'London Season' events of:

- Henley Royal Regatta
- Royal Ascot
- Royal Windsor Horse Show
- Cartier Queen's Cup at Guards Polo Club

Thames Valley Berkshire's Windsor Castle is the oldest and largest occupied castle in the world. Nearby are national stadiums for rugby at Twickenham, cricket at Lords and football at Wembley. Golf courses abound including international standard courses at Wentworth and Sunningdale. Other attractions include Legoland Windsor, Reading music festival and nearby Thorpe Park and Chessington World of Adventures.

Attractive living environment

Thames Valley Berkshire is one of the few locations in the UK where it is possible to live and work in a picturesque setting but within easy reach of a world city, London. Over a third of Berkshire is designated an Area of Outstanding Natural Beauty, one of the highest concentrations in England.

Shopping and eating out

The Oracle, Reading's premier shopping destination hosts 90 retail units - combining chic boutiques with major department stores. It also has a 10 screen Vue cinema and a wide range of eateries. Windsor Royal Shopping is located opposite Windsor Castle in the Grade II listed Victorian Railway Station. The vast array of shops and restaurants of London and Oxfordshire are within close proximity, including those at Bicester Village.

The Berkshire village of Bray has two of the UK's four three-Michelin-starred restaurants, The Fat Duck and the Waterside Inn.

// **There are excellent transport links and an enviable setting close to London and Heathrow, and yet enjoying a predominantly rural backdrop //**

Royal Borough of Windsor & Maidenhead

Education in Thames Valley Berkshire

Schools

There are many excellent state and private schools in the sub region, including the world renowned Eton College, Wellington College and St George's Ascot. Two international schools are located within a short distance of TVB – ACS Egham in Surrey and the European School Culham in Oxfordshire. Top rated state funded schools include the Downs School and Charters School.

Schools in Reading and Slough perform particularly well in terms of A-level and GCSE results. Reading has the highest proportion of pupils going to Oxford or Cambridge University (6%) and the second highest proportion going to a Russell Group university (38%) in the country.

Universities

The University of Reading is in the top 1% of the world's 20,000 universities and has over 17,000 students, including 6,400 overseas students from over 140 nationalities. The University's research specialisms include climate systems, earth observation, cardiovascular and metabolic, integrative neuroscience and neurodynamics, human nutrition, evidence-based psychological treatment, food security, information design, economic history and international capital markets.

The University's Henley Business School is one of the world's few business schools to hold triple-accredited status and is consistently ranked among the world's top 50 business schools by the Financial Times and The Economist.

Other nearby Universities include the University of Oxford, Oxford Brookes, Imperial College and the University of Surrey.

// At Henley Business School we have a programme of engaging SMEs through a variety of initiatives which link to the University's dedicated business incubation centres to help SMEs grow and provide opportunities for our students and graduates //

Henley Business School

Cost of living

Housing

Housing affordability varies from 6 ½ times the average income in Slough to 10 times the average income in Windsor and Maidenhead. This compares with 18 times in London. Rental prices in Reading are on average 42% lower than in London.

Wages

Average weekly pay for full-time employees in Thames Valley Berkshire ranges from £580 in West Berkshire to £650 in Wokingham. Average salaries in the Computer and IT industry are £6,000 lower in Berkshire (£52,000) than in London (£58,000).

Salaries for IT Professionals

	Berkshire	London	Difference
Web developer	£38,300	£52,300	£14,000
ASP .Net developer	£43,700	£52,700	£9,000
Systems engineer	£46,000	£50,600	£4,600
Software development engineer	£46,500	£46,500	£46,500
.Net developer	£46,500	£57,700	£11,200
Software developer	£47,300	£64,700	£17,400
Network engineer	£48,400	£54,900	£6,500
Java software developer	£51,800	£68,500	£16,700
Solutions architect	£77,300	£82,200	£4,900

Case studies



Availability of Talent

Canadian and US headquartered IT company Absolute Software established their European headquarters in Reading.

"We found the region to be a perfect fit for our business. The language match and familiar environment has made the cultural transition very easy. The talent pool and high quality technology recruiters who source top-level candidates have enabled our transition from the US to be as smooth as possible.

If the purpose of your UK office is as a gateway to Europe, language might be a key focus for you in your recruitment drive. Make your recruiter aware of your European or other language requirements so that you are able to get the best of both worlds – a European HQ with English as the primary language and the convenience of a global workforce, with the requisite language skills to make European expansion easy"



Connectivity

FireHost chose Slough as the base of UK operations, due to the area's increasing reputation as a technology hub. Being well connected, both in terms of transport and telecommunications, made the area the ideal location for expanding into the UK market.

"Our commitment to expanding operations into the UK and Europe is a reflection of the opportunity we see here, as businesses realise that they cannot take risks with securing company websites and business applications against malicious cyber-attacks," said Katrena Drake, Director of European Operations at FireHost. "I'm very excited about building a UK team at our Slough base, and we're keen to bring something to the local area."

Case studies



Business base, talent and connectivity

AliveCor, a small, rapidly expanding e-health company based in San Francisco, chose to locate in Slough

Of their investment in the Thames Valley, AliveCor states, 'it's an ideal location as it contains the correct mix of industries that we need and impacts: Mobile Telecoms, Medical Technology, Secure Cloud based storage and big data analytics. The calibre of potential staff and collaborative industry partners is second to none. Also, as this is the EU base, to be close to Heathrow airport is vital to reach all of the EMEA markets'.



Connectivity and cost

Spanish IT Systems Integrator (SI) Aventia chose Reading over London for its UK base.

"When planning its move to the UK we looked at a number of locations. Like many foreign businesses entering the UK market we initially considered a move into London, but having seen the advantages offered by the Thames Valley in terms of ease of travel, cost of accommodation and proximity to both our target client base and its major partners we opted to settle in central Reading".

'Case studies produced by Thames Valley Chamber of Commerce'

Sources

Page	Data	Source
7	Tech clusters	KPMG Tech Monitor 2014
7	Tech enterprises	UK Business Count, Office for National Statistics, 2014
7	Tech workforce	Business Register and Employment Survey, Office for National Statistics, 2014
8	Ownership of tech companies	MINT Business Database, 2015 Bureau Van Dijk
8	Private sector workers in foreign owned companies	Inter-Departmental Business Register, 2010 - 2011; commissioned from Office for National Statistics in 2013
19	Tech specialists	EMSI Analyst, based on Office for National Statistics, Business Register and Employment Survey and Annual Population Survey data
20	GVA	Office for National Statistics, 2014
20	Productivity	Office for National Statistics, 2014
20	Workforce numbers	EMSI Analyst, based on Office for National Statistics, Business Register and Employment Survey and Annual Population Survey data
20	Qualification levels	Census 2011, Office for National Statistics
20	Migration	Census 2011, Office for National Statistics
20	High skill roles	EMSI Analyst, based on Office for National Statistics, Business Register and Employment Survey and Annual Population Survey data
24	Train travel	Fastest travel times in hours and minutes, National Rail (as of March 2015)
29	Weekly pay	Annual Survey of Hours and Earnings 2014 Office for National Statistics
29	IT salaries	Labour Insight, Burning Glass Technologies, 2015

References

International presence

Thames Valley Inward Investment Portal www.thamesvalley.co.uk/

Cyber Security

University of Oxford www.cybersecurity.ox.ac.uk/

University of Surrey surrey.ac.uk/sccs/

Royal Holloway, University of London rhul.ac.uk/isg

Systems Research Laboratory at the University of Reading isr.reading.ac.uk

Machine to Machine/Internet of Things

Grow @ Green Park connectvtv.co.uk/grow

Start-Ups and SMEs

Connect TVT connectvtv.co.uk

Berkshire Business Growth Hub berkshirebusinesshub.co.uk

Enterprise Centre readingenterprisecentre.com

Knowledge Transfer Centre reading.ac.uk/ktc

Thames Valley International Technology Conference tvtechconf.co.uk

Thames Valley Funding Escalator

www.thefsegroup.com/thames-valley-berkshire-funding-escalator

FSE Angel Club thefsegroup.com/investors-landing/fse-investor-network

Talent

UTC Reading utcreading.co.uk

Infrastructure Development

crossrail.co.uk/route/ M4 Smart Motorway

highways.gov.uk/roads/road-projects/m4-junctions-3-12/

Superfast Broadband www.superfastberkshire.org.uk/

Education in Thames Valley Berkshire

University of Reading Reading.ac.uk

Newbury College www.newbury-college.ac.uk/

BCA www.bca.ac.uk/

Reading College reading-college.ac.uk

Bracknell & Wokingham College Bracknell.ac.uk

East Berkshire College Eastberks.ac.uk



100 Longwater Avenue
Green Park
Reading
RG2 6GP
0118 9450200

thamesvalleyberkshire.co.uk

