



Swindon Economic Development Vision and Framework

CONTENTS

THE ECONOMIC DEVELOPMENT VISION FOR SWINDON	2
GLOBAL TRENDS	3
INTERNATIONAL COMPETITIVENESS	5
SWINDON'S POSITION IN BRITAIN	7
REGIONAL DRIVERS	8
SWINDON ECONOMIC SECTORS OVERVIEW	9
FUTURE GROWTH SECTORS	11
DELIVERING THE VISION	13
ECONOMIC DEVELOPMENT FRAMEWORK	14
REALISING THE VISION	16
APPENDIX: Results from Growth Workshops – Inspiration and Aspiration	17



THE ECONOMIC DEVELOPMENT VISION FOR SWINDON

‘By 2026, Swindon will be a leading regional centre, offering a high quality life not just to its 250,000 residents but also to a much wider catchment area. We will be the best business location in the UK with a mature, dynamic and successful economy.

Swindon will have an international reputation as a centre of innovation, science and technology and as an example of sustainable living. It will have a dynamic and vibrant town centre, with radically improved cultural, educational and leisure facilities.’

This is a challenging Vision, which is built upon the evident strengths of Swindon and its people. Swindon is a success story on many levels and has a tradition of embracing change and growth. This Vision document examines the trends, threats and opportunities, which Swindon will face in the coming years. It poses questions about how Swindon addresses these challenges and proposes an ambitious agenda for development and improvement.

In developing this Economic Development Vision and Framework we have worked with local business leaders and organisations. It was adopted by the Swindon Strategic Economic Partnership in November 2006 and by Swindon Borough Council in January 2007.

GLOBAL TRENDS

This Economic Development Vision and Framework has been developed within a context of long-term global change. A series of workshops with a wide range of business interests explored global trends and examined those that were relevant to the future economic development of Swindon. [The Global Trends presentation is available via www.maketheconnection.co.uk].

The trends that had most resonance with Swindon's position are as follows:

DEMOGRAPHIC CHANGE

In Western Europe there is trend towards an ageing population, with people living longer and birth rates static or declining. Over time this will put increasing pressure on economies, with people expected to work longer, a deferred retirement and a shrinking labour pool. The needs of an ageing population will be a major growth section of the economy, not just in health care, but all consumer markets, financial services, construction and so on. This is set against a global context of a rapidly rising world population, migration and mobility.

Western Europe is seeing an increasingly mobile population, with people much more prepared to move between countries and within countries. In the UK recent trends include an influx of workers from the former Eastern Europe, for example Poland, who have filled many vacancies in the UK and helped keep the economy steadily growing. Increases in personal wealth, coupled with an era of cheap flights have led record numbers of UK citizens to buy second homes overseas as holiday homes or to relocate.

It is likely that over the long term, particularly as birth rates within the UK remain static, that there will

be increasing pressure for migration from Eastern Europe and the fringes of the EU, such as the near east and north Africa.

Within the UK two trends are emerging – migration from London to the wider South East, East of England and South West, and a rise in the number of people with second homes and very dispersed commuting patterns. It is not uncommon for people to either commute long distance or have separate week-day/city and weekend/rural residences.

RESOURCE DEPLETION

Pressure on the earth's natural resources is becoming an issue of rising global concern. The effects of global warming are now only beginning to be understood and accepted as an issue that needs seriously tackling.

Solutions to the problems of air, energy, water and land depletion will become increasingly urgent, not only in Western Europe, but throughout the world.

TECHNOLOGY:

Technological advances continue to be made in all scientific fields. Areas that have particular growth potential include biotechnology and technology around connectivity, e.g. Internet and mobile telephony, and their convergence. These industries are still largely in their infancy and have enormous potential to transform societies and economies.

SOCIAL POLARISATION:

Whilst average living standards globally are rising, there is increasing tension between those whose living standards are static or marginally increasing and those whose living standards have increased rapidly and are materially very high. These tensions have the potential to fuel social unrest around the world and it is an enormous challenge for governments to spread the benefits of increased wealth and life chances throughout their large and rising populations. These populations are also now increasingly urban with a number of cities expanding to become enormous urban areas with extensive shantytowns.

HEALTH AND WELL-BEING:

In Western Europe there is an increasing interest in promoting one's own health and well-being – linked to an ageing population and increased personal wealth. Cigarette

consumption is generally declining and there are growth areas in both conventional medicine and non-conventional or alternative therapies. The well-being sector's growth over the last 20 years is set to continue and its impact can be seen in a wide variety of consumer markets such as retail, tourism, healthcare and leisure.

THE ECONOMIC GROWTH OF CHINA AND INDIA:

These two nations have in recent years started to develop their economies through a mix of rapid urbanisation, infrastructural investment and the introduction of a controlled market economy. The statistics are staggering – e.g. China and India are producing on average 1 million engineering graduates per year, compared with the US and Europe's 170,000 per year. China recently announced its intention to build 48 new airports in the next 5 years. India and China are the two most popular destinations for off-shoring IT and business processes. China's growth is distorting traditional markets for raw materials, e.g. last year China consumed 42% of the world's steel production and used 34.8% of the world's coal extracted. These two nations are poised over time to start to overtake the traditional major economies of the world and will seek commensurate global influence in trade and international politics.

INTERNATIONAL COMPETITIVENESS

The Government's strategy for UK international competitiveness can be summarised as:

- Promoting competition and enterprise
- Fostering science, technology and innovation
- Raising skills
- Promoting economic leadership in the UK's nations and regions.

A recent study undertaken on behalf of the Welsh Development Agency asked international companies what the key factors would be in identifying their 'ideal' location.

The top ten factors were:

1. Strong economy
2. Agreeable climate and environment
3. Friendly local people
4. Strong tradition in culture and arts
5. Widely available entertainment/leisure
6. Skills base/educated workforce
7. Exceptional architecture
8. Good public services
9. Attractive labour legislation
10. Strong currency

(The Power of Destinations by The Communication Group plc,

Sponsored by the Welsh Development Agency)

The research showed that companies, and the individuals within them, make locational decisions based on a mixture of “hard” factors e.g. economic indicators and “soft” factors e.g. strong tradition in culture and the arts.

Attempts to improve International competitiveness and the attractiveness of locations to existing and potential investors have common themes and underline the importance of:-

- The knowledge economy and knowledge workers
- An entrepreneurial environment, which encourages risk takers and innovators
- A strong cultural offer
- An excellent overall quality of life
- Differentiation – being unique, specialised and noticeable



SWINDON'S POSITION IN BRITAIN

Swindon is in the top 25% of Britain's local authority areas for:-

- Productivity
- Knowledge economy
- Enterprise
- Housing affordability

It features in the top 50% for skills and qualifications.

It features in the bottom 50% in Britain in the following areas:-

- Deprivation and inequality
- Wealth
- Health
- Crime (whilst on a national scale it is in the bottom 50%, it's actually good for an urban area and compares well with competitor towns)
- Sustainable travel (a large commuting footprint)

Some of these results may seem contradictory but can be explained when the history and geography of Swindon's local economy is examined. It is clear that Swindon has a successful, modern and diverse local economy. This economy has benefited from locational

advantages – relatively near the global city of London, but far enough away to offer value accommodation, proximity to the M4 transport corridor, excellent rail links, a relatively large rural hinterland with competitor cities far enough away not to compete directly for local consumer spend, and a skilled workforce with an engineering tradition that has served the newer sectors of advanced manufacturing, telecoms and pharmaceuticals.

However, not everyone has benefited from Swindon's success. Low incomes and a concentration of people who are economically inactive – either job-seeking or on incapacity benefit – leads to a poor showing on deprivation and wealth. These have knock-on effects that are highlighted in relatively poor crime and health performance.

The town centre has suffered in the past from a lack of investment and has not kept pace with the economy. This has meant that those who create the wealth spend it elsewhere, setting up a vicious circle of decline.

Surrounding rural communities have their own needs, in particular supporting the rural economy and tackling transport and housing affordability issues.

In their publication, *State of the Nation 2006*, the consultancy group *Local Futures* analysed a series of indicators, which assess the relative position of all local authority areas in Britain (statistics for Northern Ireland are not included). The results for Swindon reinforce the *Community Strategy* and approach taken by the Council and its partners through the *Local Area Agreement*. (www.swindonlaa.org.uk)

REGIONAL DRIVERS

Swindon's relative economic success, its size and its location in terms of connectivity to the South East and a relatively large rural hinterland, mean that it has been identified as a "Strategically Significant Town" within the emerging South West Regional Spatial Strategy. This essentially means a growth agenda, with an additional 35,000 houses planned for by 2026 with a forecast increase of 32,000 jobs in the local economy. A proactive and concerted effort will need to be made to deliver this level of investment.

As part of the South West's response to the Government's Sustainable Communities initiative, Swindon forms a key location in "The Way Ahead" – an economic growth strategy that focuses on 8 urban areas and their capacity to deliver economic growth and investment.

The Regional Economic Strategy has recently been reviewed and its analysis of Swindon and its overall priorities are based around 3 strategic priorities:-

- Successful and competitive businesses
- Strong and inclusive communities
- An effective and confident region

A full copy of the Regional Economic Strategy and supporting reports can be found via www.southwestrda.org.uk.

SWINDON ECONOMIC SECTORS OVERVIEW

Swindon has a successful local economy with the 4th highest Gross Value Added (GVA), in the Country outside London. It has relatively low unemployment and hosts many well-known and successful companies – several of which are featured in the inward investment campaign “Make the connection” (www.maketheconnection.co.uk)

The following overview gives a short pen picture of the important sectors for Swindon and their prospects.

Advanced Engineering: Very strong representation in Swindon, particularly in the automotive sub sector (Honda, BMW plus a network of supplier and associated companies), but also in semiconductor manufacture (e.g. Tyco Electronics, and Zarlink Semiconductors). In line with UK trends, the sector overall is forecast to decline over the next 20 years freeing up urban, brownfield sites, and creating major reskilling issues particularly for older workers.

Biotechnology: Strong representation in Swindon, particularly in the pharmaceutical sub sector, and forecast to grow significantly over the next 20 years.

Growth depends upon the availability of high quality incubator space and ‘move-on’ space, as well as a pool of highly skilled professionals.

Construction: This sector is dominated by small employers and informal labour therefore it is difficult to estimate the size of the sector. However, companies in Swindon include Halcrow and Hochtief and other construction consultancy services. The construction sector is of particular importance to Swindon in the light of the Borough’s anticipated building programme to meet its growth projection over the next 20 years.

Creative Industries: A modest growth is predicted over the next 20 years. The sector is dominated by small businesses and locational criteria are tied closely with the ICT sector, with many overlaps around animation, audio, visual, etc. Growth in the sector will be focused around digital content, and to a lesser extent, the cultural sub sectors. Regeneration of the town centre will provide an environment to kick-start the sector.

Environmental Technologies: Swindon has a strong presence from two major players in this emerging sector, namely RWE nPower, and Johnson Matthey Fuel Cells. Overall the sector is dominated by small companies, and notably consultancies, yet, it is a significant growth area most associated with new technologies.

Food & Drink: Primary production is associated with the Borough's rural areas, which are under pressure for diversification towards alternative uses. With its excellent location and infrastructure Swindon has strengths as a centre for food distribution and logistics, although this tends to be a low-density employer. Generally the sector is low skilled, and is not anticipated to grow over the next 20 years.

Information & Communication Technologies: Swindon has many leading edge ICT related companies e.g. Intel and Motorola, and it is a sector that is expected to continue to grow, driven by developments in new technology. Trends include a shift towards activities such as software, media, content, and services. This, together with the advent of network technologies such as broadband Internet, digital interactive television, and mobile and wireless communications are creating huge new markets for ICT. In Swindon the sector is forecast to increase by over 6,000 employees over the next 20 years.

Tourism & Retail: Swindon's locational advantages and existing hotel stock have created a strong conferencing market with much growth potential. The regeneration of the town centre

will enable a reinvention of the leisure and retail offer in the high street, creating a better quality leisure experience. There will be continued demand for high street pitches, while operators of larger leisure facilities will require strategic locations with good accessibility and visibility. The Science Museum at Wroughton aims to attract around 500,000 visitors a year to its new National Collections Centre within a decade; an attraction of that scale on Swindon's doorstep will have major benefits to other visitor related businesses.

Public Sector: This sector is dominated by Swindon Borough Council (c.6,000 employees), the NHS and the education sector. The town is host to 5 of the 8 UK Research Councils, and has a sizeable presence from English Heritage, including the National Monuments Records Office. While nationally the sector is forecast to grow in modest terms, in Swindon there exists potential for some growth. This is due to two particular factors, firstly the development of a new campus for Bath University in the town, and secondly the attraction of government departments out of London and the South East.

Financial Services: Although dominated by two HQs of global proportion (Nationwide Building Society and Zurich Financial Services, employing around 6,000 between them), the sector overall is dominated by smaller business service companies. This is a growing sector nationally, and particularly in Swindon, and is forecast to continue to grow over the next 20 years.



FUTURE GROWTH SECTORS

In thinking about the future we have analysed global and national trends and examined the strengths and potential of the existing local economy. Using the growth target approach we have also sought to understand the current weaknesses of Swindon's local economy and think of ways to plug the gaps.

There is potential for Swindon to develop strengths in the following sectors:-

- **UK centre of science and technology development**

Building on the science and technological strengths of many of the large companies in Swindon and their local supply chains. The arrival of a research based university will further add strength to this sector.

The potential is characterised by:

- Innovation Research and **development** cluster
- Home of the National Science Museum
- A catalyst for scientific and technological cultural development
- Close partnership between the business community, the University and Council

- **UK centre for environmental technology**

Primarily drawn from the global trends research and already recognised as a South West Regional Development Agency (SWRDA) priority, commercial solutions to the problems of resource depletion have significant long term potential. The solutions may include:

- Research in Environmental management
- Hydrogen-based vehicle production
- Fuel cell production and renewable energy research
- Leading waste management services
- Low energy landmark buildings
- Clean fuel public transport system
- Sustainable construction design centre

- **People care industries**

Driven by the Western European trend of an aging and increasingly active population, the economic potential of the grey market is enormous. It will continue to drive innovation and demands for healthcare and well-being products and services. It will also lead to growing market opportunities for all industries and sectors e.g. insurance, construction and design of buildings, robotics and sensing technologies, leisure and tourism. Opportunities in Swindon to include:

- University Health Faculty with Teaching Hospital
- Technology centre for remote sensing and communication systems
- Manufacturing centre of intelligent buildings and systems
- Secondary people-care industries in data/healthcare management

- **Cultural industries**

In assessing Swindon's needs in terms of its competitiveness and attractiveness to investors and residents, it is clear that Swindon has the potential for improving its cultural offer. This has the potential both to create jobs but also to significantly improve the reputation and image of Swindon – providing the differentiation it needs to compete. Swindon's cultural offer could be characterised by:

- Centre of excellence for Heritage research
- Successful and innovative museums and galleries
- Digital production of art and media
- National reputation for festivals and events

DELIVERING THE VISION

A Do-nothing Option

If Swindon were tempted to rest on its laurels and not take an active approach to economic development, it would find that over time:

- Existing locational advantages have become less valued
- The market perception of Swindon could be of a “value orientated” retailing, office and warehouse location
- Industrial re-structuring would see job losses in the town as companies offshore their operations with few new sectors emerging
- Local competitor locations such as Bristol, Reading, Oxford, Milton Keynes, Cheltenham, Slough and Bath become more attractive places to invest and live.
- Swindon’s poor image means it is overlooked for investment – both corporately and from talented individuals
- Increasing numbers of Swindon’s people find themselves unable to compete for skilled jobs
- Poor educational attainment and low aspirations lead increasing numbers of young people to disengage with society

Whilst not wanting to paint a “doomsday scenario” it is clear that Swindon will face a number of challenges to its continued success and the desire to improve the quality of life for all its people. Swindon has historically risen to the challenges of change and proved remarkably adaptable and resilient. A proactive and thoughtful approach to local economic development can provide a framework for anticipating and influencing local change.

Smart Growth

An alternative to doing nothing is a planned and interventionist approach to meet the challenges highlighted earlier in this paper. We propose a “Smart” approach to economic growth, which:-

- Focuses on the latent potential of Swindon’s people – up-skilling those in work and bringing a greater proportion of them into the labour market
- Raises educational attainment and aspirations
- Encourages entrepreneurs
- Enables existing businesses to grow
- Encourages new economic sectors
- Regenerates the Town centre – and makes the best of “brownfield” land
- Creates a destination for people to enjoy and spend time and money
- Seeks solutions to the challenges of climate change
- Provides the most sustainable environments for communities and businesses
- Raises average incomes
- Promotes wider success factors – education, culture and the environment – making Swindon an attractive place to live.



ECONOMIC DEVELOPMENT FRAMEWORK

The table below attempts to draw together the core range of activities, which make up Swindon's Economic Development Framework. The four building blocks are all interrelated. All economic development related activities and projects should make an impact within one or more of the building blocks.

Business creation & growth <ul style="list-style-type: none">• Inward investment• Start ups and entrepreneurship• Sector development e.g. Creative industries, Advanced engineering, Environmental technology, People care• Enabling existing business growth	Regenerating & creating places <ul style="list-style-type: none">• Town centre regeneration and management• Neighbourhood renewal• New Communities and business parks• Infrastructure provision
Image & culture <ul style="list-style-type: none">• Place marketing and reputation building• Cultural industries and facilities• Festivals and events• First class sports facilities	Skills & labour market <ul style="list-style-type: none">• Raising skill levels• Widening labour market participation• Raising attainment• Education and business links

This framework incorporates the projects within the Economic Development Block of the Local Area Agreement – 'Swindon, the UK's Best Business Location'

- **Outcome 1:** We will establish Swindon as the leading location in the UK, for new, relocating and existing businesses and encourage the growth and development of existing businesses.
- **Outcome 2:** We will develop a local workforce with the right skills base for our economy.
- **Outcome 3:** We will be a pioneer in the use of digital technology ensuring that all people have access to the benefits of the Internet and information technology.
- **Outcome 4:** We will increase the proportion of working age people who are economically active, particularly in Neighbourhood Renewal areas.
- **Outcome 5:** We will establish Swindon as a National destination for cultural and leisure events and ensure that more of those who work in Swindon also live, shop and socialise in the Borough.

Transformational Projects and Stepping Stones

In addition to the activities described on the previous page such as inward investment, sector development and ensuring adequate infrastructure for business growth, there are a number of projects already underway, which will make a significant impact in the economic development of the town, they are:

- **A University for Swindon**
- **National Science Museum Swindon**
- **Town centre regeneration**
- **Creating new communities and community renewal**
- **A connected business community – creating a business organisation for the 21st century**
- **Local Area Agreement – the UK's Best Business Location**

In order to achieve these Transformational projects and to help build a success story several Stepping Stone initiatives have been identified:

- University – securing funding, completing the academic strategy and securing planning permission
- Funding for Science Museum Swindon – Big lottery, Corporate and Government funding
- The Exchange development – The New Swindon Company undertaking developer selection
- New Central Library – due to be open in 2008
- Granville Street development – developer chosen for additional 300,000 sq ft of town centre retail and leisure
- New Civic Campus – landmark building in the town centre
- Wichelstowe development, creating 3 outstanding communities to the South of Swindon
- Transport Masterplan – a forward looking plan for improving sustainable movement in and around the Town
- Strong business voice – Swindon businesses working together to influence the town's development
- Swindon Business Connects – a project aimed at maximising the benefits of businesses and the community working together
- Digital Swindon – harnessing the capacity of Wireless ICT for Swindon
- 2007 South West Enterprise bid – showcasing the entrepreneurial talent of Swindon and the positive support system that exists
- Festivals – establishing a programme of festivals to be held throughout the year
- Local Area Agreement projects delivered – the Local Area Agreement includes a series of ambitious targets over a three year period. Task groups have been established to focus on their achievement
- Swindon Ambassadors – a project aimed at harnessing local goodwill towards Swindon and encouraging people to talk up the transformation of the town
- Wiltshire and Swindon Constructive – a project aimed at up-skilling and attracting more local people into the construction industry
- Heritage led regeneration strategy including Mechanics Institute and Health hydro – Swindon has a great Victorian built heritage which needs conserving and enhancing
- Hosting one or more countries participating in the 2012 Olympics.

REALISING THE VISION

This vision has been produced by the Swindon Strategic Economic Partnership – a group of business leaders and public agencies who initially came together to develop the Swindon Local Area Agreement (LAA) “the UK’s Best Business Location”.

It was subject to a rigorous consultation during Autumn 2006 and was adopted by Swindon Borough Council in early 2007.

The Vision will form the basis of a 3 year Economic Development Strategy for the LAA Partnership.

Further copies of this document and the strategy are available from the address below.

This document is available as a PDF download on:

www.maketheconnection.co.uk

This website also contains links to other sites of interest.

Please get in touch by calling the Economic Development team on 01793 466008

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APPENDIX: Results from Growth Workshops – Inspiration and Aspiration

Growth targets

The targets set out below follow a workshop held with local business leaders during Spring 2006. They are deliberately ambitious and are designed to stimulate debate.

2026 Target	Current Position
250,000 population	182,200 population
All Swindon Schools in the UK's top 25%	1% of Primary Schools and 0% of Secondary schools in UK's top 25%
Disposable Household Income in the top 10% of UK	Disposable household income in the top 25% of the UK (26th out of 131 areas).
50 businesses with a turnover of over £500m	36 businesses with a turnover of over £500m
50% of the population with a qualification equivalent to NVQ Level 4	24% of the population with a qualification equivalent to NVQ Level 4
No wards containing areas in the bottom 20% of England in measures of deprivation.	6 out of the 22 wards contain areas in the bottom 20% of England in measures of deprivation.

Similarly by 2026 Swindon should have:-

- A Sustainable advanced public transport system
- Renewable Energy technology development centre

The Growth Plan on the following page gives more detail of the type of milestones and challenges identified in the workshop. It is an approach that has been taken by the Government of Singapore to help them decide on strategic investment and think through the milestones needed to achieve ambitious goals.

	Key Growth Targets	Built and Creative Environment			
2025	<p>250k Population</p> <p>3 x 2006 GDP/Capita (excl inflation)</p> <p>#1 UK Sustainable City (ahead of all govt targets)</p>	<p>Zero net Energy City</p> <p>45 mins travel time to Bristol Airport</p> <p>Water in the town centre</p>	<p>Fully integrated Transport system</p> <p>Green island retained</p> <p>All Swindon schools in UK top 200</p> <p>Independent university</p>	Capability	
2020	<p>Swindon twinned with Bangalore</p> <p>Top town centre ranked by capital values</p> <p>X% companies retained</p> <p>Development centre for science, technology and engineering</p> <p>Top 10 UK Conference Centre</p>	<p>Strong cultural brands</p> <p>Sustainable advanced public transport system</p> <p>Guided bus network from Park & Ride to centre</p> <p>Renewables technology development centre</p>	<p>Zero waste City</p> <p>Thriving private schools</p> <p>5* Research in Environmental Technology / Services</p> <p>Academic awarding body</p> <p>50% of population with NVQ Level 4</p> <p>Business training academies</p> <p>Swindon 'China Town'</p>	Business Focus	
2015	<p>Museum is equivalent to Eden Project</p> <p>Lowest crime city in UK</p> <p>Top 20 UK Tourist Destination</p>	<p>Award winning urban village</p> <p>Design-led innovative housing</p> <p>City theatre/concert hall</p> <p>Intl. music festival</p> <p>Stimulating open spaces</p> <p>Direct LHR rail link</p> <p>Digital City</p> <p>#1 at science in UK for <16</p> <p>Skills Academy</p> <p>Business in schools initiatives</p>	<p>Shanghai University partnership</p> <p>World class business Faculty at University</p> <p>Showcase Swindon</p> <p>Average Swindon School in UK top 10%</p> <p>Renowned centre for youth enterprise</p> <p>Verifiable 'can do' and 'open for business' attitude</p> <p>UK 'product trials' capital</p>	<p>Joint Council and business investment company</p> <p>2 x 2006 R&D Intensity</p> <p>20 New €500m t/o companies</p> <p>X% more high growth (€1-10m) companies</p>	Challenges
2010	<p>Redevelopment Of Town Centre</p> <p>Business Incubator</p> <p>Science Museum</p> <p>New offices</p> <p>Media cluster</p> <p>"Can do" planning</p> <p>Swindon credibility & image</p>	<p>Charter for business</p> <p>Investment in existing population</p> <p>Funding of university</p>	<p>Balance of business portfolio</p> <p>Funding of transport</p> <p>Skills match to high growth skills of existing population</p>	<p>Changing perceptions of Swindon (in and out)</p> <p>Funding for capital development</p> <p>Energy shortages</p> <p>Water supply</p> <p>Keeping M4 flowing</p> <p>Social divergence</p>	

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