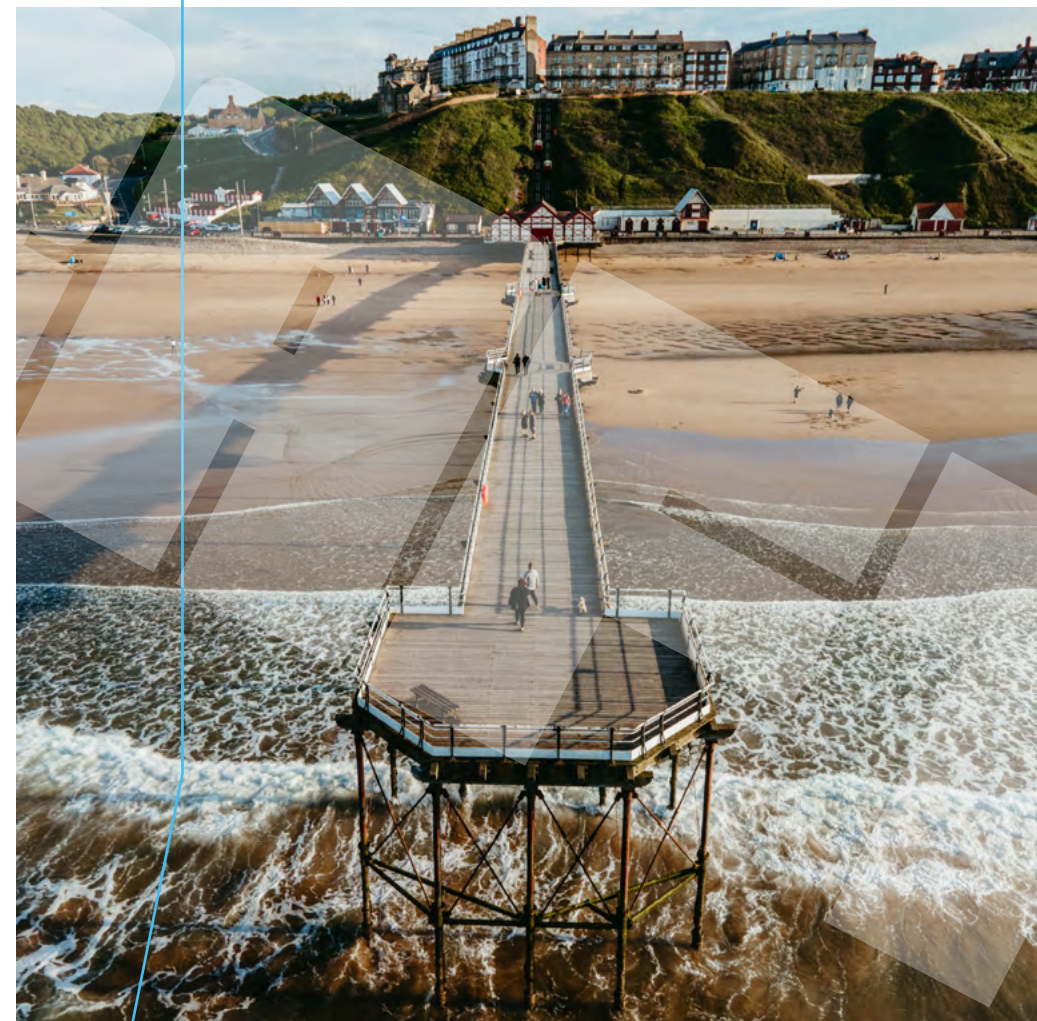


Our Plan for Regional Prosperity

Tees Valley Local Growth Plan

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TVCA CABINET FOREWORD

Tees Valley's potential is set to be unleashed like never before.

Our region's long history of innovation, from its Herculean iron and steelmaking industry to rich rail heritage, built the world and got it moving. Ever since, we've not slowed down, turning every setback into an even stronger comeback.

For the past 30 years, starting with the Tees Valley Joint Strategy Unit and Tees Valley Development Company, our towns have been working hand in glove to drive our economy forward. Since 2016, our devolution deal with Government has helped accelerate the development of our infrastructure, skills, arts and culture, inward investment sites and much more – all underpinned by a Strategic Economic Plan and Ten-Year Investment Plan.

And now it's time for the next chapter.

This Local Growth Plan sets out our strategic vision for the future – one in which a high quality of life is not the end goal; it's fundamental to our economy.

Where we're confident, outward-facing and rightly proud about all we have to offer.

Whether it's our cutting-edge chemicals and process, clean energy, life sciences and biomanufacturing, advanced manufacturing or digital and creative industries – and everything in-between – we harness our inventive spirit to get things done.

We're strengthening our foundations to drive opportunity to deliver prosperity, increasing outcomes for people and businesses, building resilience and growth for our fantastic local businesses and – ultimately – putting more money in people's pockets.

We know we live in an incredible place, with our vibrant and unique boroughs – connected and defined by the mighty river Tees – each offering something unique. For visitors, for businesses, for investors and for our local people. This document makes clear our vision and shouts about all we have to give.

But this isn't simply a sales pitch, it's a collaborative, considered and comprehensive plan of our key sectors, priorities and cross-cutting actions that can and will make real and lasting changes to our area. It sets out our investment pipeline and key interventions to capitalise on our strengths, all backed by robust economic analysis.

Our ten-year Local Growth Plan is a collective effort in which we will all play a part to truly make Tees Valley a region where anything is possible.



Ben Houchen
Tees Valley Mayor



Councillor Steve Harker
Leader of Darlington
Borough Council



Councillor Graham Harrison
Leader of Hartlepool
Borough Council



Mayor Chris Cooke
Mayor of Middlesbrough



Councillor Alec Brown
Leader of Redcar & Cleveland
Borough Council



Councillor Lisa Evans
Leader of Stockton-on-Tees
Borough Council



Matthew Ord
Chair of the Tees Valley
Business Board

EXECUTIVE SUMMARY

This document sets out Tees Valley's 10-year strategic framework for regional prosperity and economic growth.

It was developed as a response to Government's requirements for Mayoral Strategic Authorities to produce Local Growth Plans in support of the UK's Modern Industrial Strategy - setting out the priorities where devolved powers and funding will be focused.

The vision is for Tees Valley to become celebrated for combining industrial strength, digital creativity and quality of life with confidence, distinctiveness and action where people choose to live, work, visit and invest.

This Plan sets out how this will be achieved, where shared priorities of Skills & Employment, Transport, Housing & Commercial Development feed into high-level local growth priorities to target innovation, productivity, connectivity and ensure talent is retained, developed and attracted. We will use our assets, levers, powers and funding to change the landscape, underpinned by partnership working and built-in resilience through co-working locally, regionally and nationally.

The document highlights our exceptional offering as the place which built the world and which will change the future, highlighting our unique assets, opportunities and physical and economic positioning ready to capitalise on our key sectors.

The ambitious, evidence-based strategy outlines our nationally important sectors such as Chemical & Process, Clean Energy, Life Sciences & Biomanufacturing, Advanced Manufacturing and Digital & Creative and how they currently contribute to the UK's economy – and their future potential.

It examines key drivers for opportunity, including how we can strengthen our physical and digital connectivity, drive good-quality and appropriate housing stock, capitalise on our area as one of huge innovation, and

where businesses and entrepreneurs are supported to be as competitive and profitable as possible.

It details how we will strengthen our foundations through a growing economy, developing thriving places and building strong communities that are home to remarkable businesses delivering prosperity for all. Through a list of six targeted packages of intervention, each focused on one of our Local Authority areas and one further cross-cutting project, a joined-up and holistic approach to regional development will change Tees Valley for the better.

At its core, the strategy reflects a clear proposition: that Tees Valley is a region of opportunity – leading the UK in innovation, attracting investment, and creating a better future for its people.



TEES VALLEY PLAN

Vision:

Our Vision for Tees Valley is a place:

Celebrated for combining industrial strength, digital creativity and quality of life with confidence, distinctiveness and action where people choose to live, work, visit and invest.

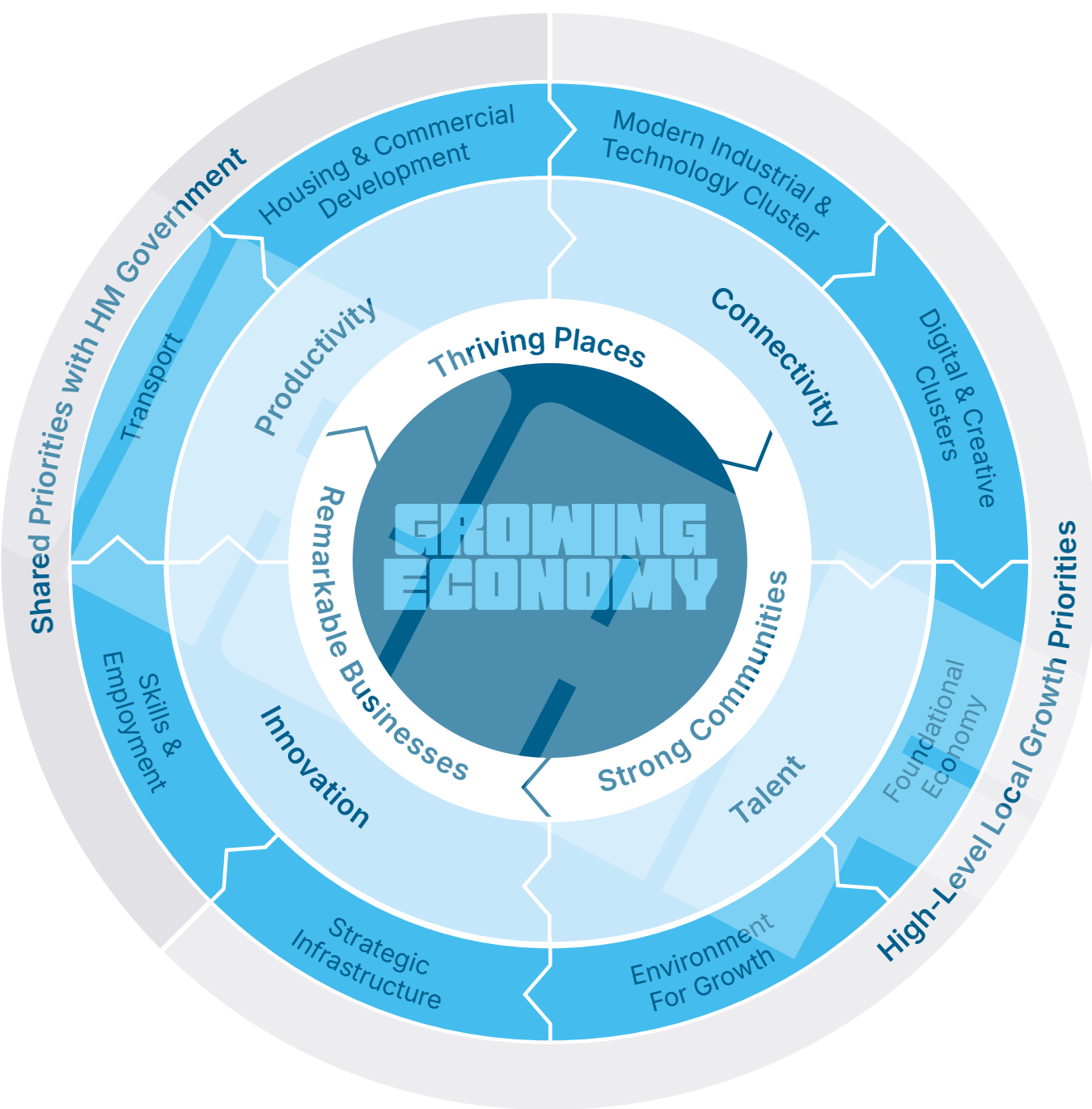
It is a place:

- That gets things done
- Of invention and reinvention
- That is connected and partnership matters
- Where quality of life is an economic asset
- Of confidence, pride and ambition

Economic Indicators:

Source: ONS

-  **713,000** Total Population
-  **£18.9billion** GDP
-  **£5.5billion** Foreign Direct Investment
-  **17,450** Business Base
-  **435,500** Working Age Population
-  **£35.40** GVA per hour worked
-  **£2.96billion** Goods Exports
-  **£16.7billion** Gross Value Added



Commitments:

Our Tees Valley – a place where...

- Everyone shares in opportunity
- People are proud to live, work and belong
- People succeed and thrive
- Our sectors power a sustainable future
- Businesses start, grow, invest and lead

Investment Pipeline Priority Package:

- **Tees Valley's Gateway:** Transforms Darlington into a highly connected regional entry point.
- **Regional Care and Health Innovation:** Develops a major health and care cluster centred on Stockton-on-Tees.
- **Digital Core:** Positions Middlesbrough as a leading digital and tech hub.
- **Creative Destination:** Builds a vibrant creative and cultural economy centred in Hartlepool.
- **Industrial Strength, Industrial Growth:** Expands globally significant industrial and clean energy clusters from their core locations in Redcar and Cleveland.
- **Our River and Coastline:** Enhances the River Tees and coastline as a unifying regional asset.

Assets

Levers

Powers

Funding

Partnerships

Resilience

Outcomes Framework

INTRODUCTION

Tees Valley forms a compact, well connected, functional economic geography with significant economic assets. Covering more than 300 square miles and being centrally located on the UK's east coast between Edinburgh and London, Tees Valley is perfectly placed for investment thanks to significant land available, notable assets and a Freeport and Investment Zone.

Our region is home to 713,000 people and made up of the five boroughs of Darlington, Stockton-on-Tees, Middlesbrough, Hartlepool and Redcar & Cleveland which are different in character, but united by shared purpose and collectively contribute £18.9billion to the national economy.

Through its rich industrial heritage, Tees Valley is the region which built the world – and with a pioneering rail and maritime history, helped to make it more connected. Significant investment has already been made across our boroughs to ensure the region has the infrastructure to support further major investments and continue being an industrial powerhouse.

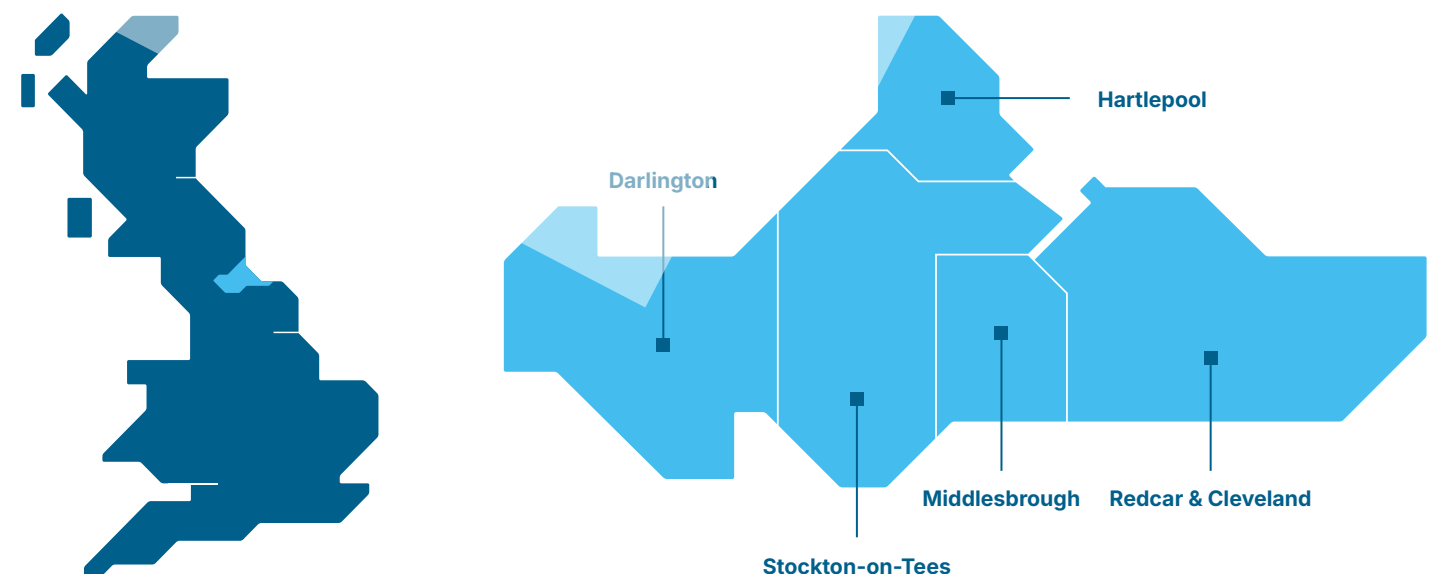
With strong rail, sea, air and road connections, and one of the least congested road networks in the UK, the region offers an accessible base for business and travel, while providing open leisure space just minutes from our town centres.

The River Tees and North Sea coastline help define the landscape and identity of the area, with beaches, riverside walks, cycling routes, water sports and access to the North York Moors all close at hand.

As the globe stands at the cusp of the new clean and digital industrial revolutions, Tees Valley is ideally positioned to lead the charge – and make sure our businesses, communities and local people benefit from our success.

We have the vision to make Tees Valley the UK's most confident, distinctive and delivery-focused region – known for combining industrial scale, digital creativity and quality of life in a way few places can match.

Tees Valley will be a place that people choose to live well, build businesses, invest with confidence and be part of something that is moving forward.



CURRENT ECONOMIC OVERVIEW



713,000
total population



17,450
total business base



£18.9billion
gross domestic product



48.9% | 51.1%
male female split



63.0
business density rate



£16.7billion
gross value added



Age split
Age 0 – 15 19.2%
Age 16 – 64 61.1%
Age 65+ 19.7%



71.9%
employment rate



£5.5billion
foreign direct investment



435,500
working age population



0.71
job density



£2.96billion
value of total goods exported



Gross Disposable
Household Income
Tees Valley £17,994
England £23,338



£35.40 productivity
(GVA per hour worked)



£55,284 productivity
(GVA per job filled)



Around 89%
(255,000 people)
of working residents live
and work in Tees Valley



25,000 residents of
surrounding areas choose to
work within Tees Valley



32,000 residents commute
to surrounding areas for
employment

Source: ONS

Local Growth Plans

The Government have been clear that economic growth is a key priority and England’s Mayors are crucial to this.

In June 2025, the Government published the **UK’s Modern Industrial Strategy**, setting out their plan for the next decade to increase business investment and grow the industries of the future in the UK. To achieve this, the Government is focused on the critical need to increase business investment, capturing a greater share of internationally mobile capital, spurring domestic businesses to scale up, and supporting small and medium-sized businesses reliant on resilient supply-chains. Eight growth-driving sectors were identified due to them having the highest potential from a national perspective. These sectors are supported by foundational industries and their supply chains which provide vital materials and parts or manage essential infrastructure.

To achieve economic growth and recognising the role of regions, Mayoral Strategic Authorities across England are required to produce Local Growth Plans. These plans must provide a 10-year strategic framework for regional economic growth, be focused on the holistic needs and opportunities, and set out the priorities where devolved powers and funding will be focused. They must include an economic overview, shared priorities and an investment pipeline.

Our Plan for Regional Prosperity is our Local Growth Plan and responds to this requirement while going one step further, capturing the importance of ensuring that economic growth is not the sole focus, and that improving the lives of our residents remains the ultimate objective.

This plan has been informed and driven by evidence and builds on our solid track record of delivery to date, positively articulating the opportunities to power a diverse and balanced economy that creates opportunities for everyone. It also makes clear that Tees Valley is opportunity rich and primed for further investment.

It has been developed collaboratively with our constituent local authorities, the Tees Valley Business Board and wider engagement with partners and stakeholders including the public sector, business and industry, education providers, and the voluntary, community and social enterprise sector. This was a conscious decision as it is our collective responsibility to foster economic growth with the ultimate aim to raise the living standards and opportunities of all Tees Valley residents.

Our Plan for Regional Prosperity will therefore be used to inform evidence-based decisions focused on creating a systems thinking approach around our functional economic geography.

THE UK'S MODERN INDUSTRIAL STRATEGY

8 Growth Driving Sectors



Advanced Manufacturing



Defence



Finance



Digital and Technology



Clean Growth



Life Sciences



Creative



Business Services

Foundational Industrial Inputs



Chemicals



Critical Minerals



Composites



Construction



Electricity Networks



Materials



Ports



Steel



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This is Tees Valley. Where anything is possible.

www.teesvalley-ca.gov.uk

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A Growing Economy

Investment is the key determinant of stimulating and unlocking further economic growth. For Tees Valley to raise living standards, we need more investment and more businesses to bring in more jobs and increased employment, which in turn will generate more money for people and households and more money for the country.

A greater income means more money in people’s pockets, an improved standard of living and quality of life, ultimately tackling the perennial challenges of poverty and deprivation which are experienced all too often in Tees Valley. Therefore, creating **thriving places, strong communities and remarkable businesses**.

The critical issue is sequencing. Economic growth flows from investment and more businesses. This is reliant on four pillars of **connectivity, talent, innovation and productivity**, creating a prosperous society, communities and region.

Included in this plan are a set of high-level local growth priorities and shared priorities that were agreed early on in the development process. These have informed the plan and will be used to guide our work over the next decade. These priorities recognise the current strengths of our regional economy based on our traditional industries and emerging sectors in addition to where we need to focus our collective efforts.

Shared Priorities with HM Government

 SKILLS AND EMPLOYMENT

Increase the skills base and reduce economic inactivity to help residents rejoin or increase participation in the workforce and support them into better employment opportunities. This will deliver a more joined-up approach which addresses local workforce challenges, providing the talent pipeline for key growth sectors.

 TRANSPORT

Improve transport accessibility and travel experiences to better connect workers across the region to employment and industrial sites. This will support residents to access more economic opportunities, with businesses better able to attract talent across a wider geography and facilitate growth and inward investment.

 HOUSING AND COMMERCIAL DEVELOPMENT

Increase the availability and viability of high-quality commercial land and space, such as office, industrial, research and development space, and appropriate housing, to increase business density and to attract and retain talent. This will provide the foundations for greater business investment and expand available talent for businesses, boosting growth and productivity in key sectors.

High Level Local Growth Priorities



Grow our globally competitive modern industrial and technology cluster – which includes the Chemical and Process, Clean Energy, Life Sciences and Biomanufacturing sectors – **and enabling Advanced Manufacturing sector** by securing further investment, deepening our innovation expertise and attracting and retaining talent.



Accelerate our rapidly growing digital cluster and creative cluster by securing further investment, growing our business base and attracting and retaining talent.



Diversify and drive the growth of our foundational economy by increasing business density and developing the skills of our people to get more people into work.



Create the environment for growth and accelerate regeneration of our communities, making Tees Valley an attractive place to live, study, work, invest and visit.



Accelerate the development of strategic transport, energy, digital and housing infrastructure to maximise the potential of our growth opportunities and create the environment for growth.

Reflecting on these priorities we are committed to making Tees Valley a place where...

Everyone shares in opportunity:

Growth creates real opportunity for people, where good jobs and incomes and a strong local economy improve everyday lives in every community.

People are proud to live, work and belong:

Vibrant places, quality homes and a healthy environment support fulfilling lives, and people feel connected, safe and proud of where they live.

People succeed and thrive:

People of all ages build skills, access opportunity and achieve their potential – staying local to go far.

Our sectors power a sustainable future:

Our industrial strengths drive innovation and productivity build resilience and secure long-term prosperity.

Businesses start, grow, invest and lead:

Businesses of all sizes thrive – innovation is supported, investment is secured, and enterprise creates lasting opportunity for local people.

OUR COMMITMENTS

The plan also includes an investment pipeline and six priority packages that have specific significance to unlock further economic growth through mobilising both public and private investment.

Tees Valley's Gateway

Transforms Darlington into a highly connected regional entry point, leveraging rail investment, town centre regeneration, and new commercial, residential, and STEM assets to attract business services, boost innovation, and drive inward investment.

Regional Care & Health Innovation

Develops a major health and care cluster centred on Stockton and Tees Central, integrating new clinical facilities, housing, education, and digital health innovation to address inequalities, support life sciences, and strengthen regional connectivity.

Digital Core

Positions Middlesbrough as a leading digital and tech hub through infrastructure upgrades, investment zones, improved transport connectivity, and town centre revitalisation to attract talent, support business growth, and enable a smart region.

Creative Destination

Builds a vibrant creative and cultural economy centred in Hartlepool, through regeneration, production facilities, heritage assets, and innovation hubs, enhancing tourism, supporting creative industries, and strengthening regional identity.

Industrial Strength

Expands globally significant industrial and clean energy clusters from their core locations in Redcar and Cleveland by leveraging deep-water ports, chemical processing expertise, and major brownfield sites to attract investment in offshore wind, SAF and advanced manufacturing.

Our River & Coastline

Enhances the River Tees and coastline as a unifying regional asset through placemaking, transport links, tourism development, environmental resilience, and investment promotion to support economic growth and quality of life.

Underpinning our system for change are a range of assets, levers, funding and powers which will be used to enhance outcomes for households and businesses. Working in collaboration with partners is crucial to this - all with a fixed focus on achieving our collective vision for Tees Valley, building upon the journey we have been on.

A journey which has initially involved reducing our past overreliance on a single industry – albeit one which our region is rightly proud of, and which put us on the map – given the need to embed greater resilience into our regional economy. We are ensuring history does not repeat itself by diversifying our economy and repositioning our region.



Tees Valley is a great place to live, study, work, invest and visit. We built the world and we will change the future from here.



REGIONAL OFFERING

THE PLACE WHICH BUILT THE WORLD...

Through its rich industrial heritage, Tees Valley is the region which built the world – and with a pioneering rail and maritime history, helped to make it more connected.

In 1825, the development of the Stockton & Darlington Railway – which gave birth to the modern railway – drove forward our towns and changed how the world traded, travelled and communicated.

The discovery of iron ore in the Cleveland Hills just 25 years later shaped our businesses and communities, leading them to become one of the country's dominant iron and steel producers.

Our unparalleled skills contributed to the First World War effort – largely producing the metal for ships and munitions – and supported efforts to rebuild, with Dorman Long's 1917 blast furnace creating steel for the Sydney Harbour and Golden Gate bridges.

Over time, this knowledge and skills have mixed with a generational spirit of determination and innovation, resulting in Tees Valley building one of the largest industrial clusters in Europe, with numerous longstanding,

established businesses being concentrated in key economic sites and supported by critical infrastructure.

One common thread running through the region's history and geography is the mighty River Tees, connecting our boroughs and providing port infrastructure vital to our past, present and future success.

Because our story isn't over yet...



India Railway Network
The entire original India Railway Network was built in Tees Valley.



Red Dead Redemption Game
Double Eleven, based in Middlesbrough, played a key role in bringing the game to modern platforms, developing the PlayStation 5, Xbox Series X/S and Nintendo Switch versions.



Petronas Towers
The Teesside Beam Mill in Redcar was used to manufacture the steel and beam sections of the Petronas Towers.



Sydney Harbour Bridge
The world's largest steel arch bridge was constructed in Middlesbrough by Dorman Long.

THE PLACE WHICH WILL CHANGE THE FUTURE...

As the globe stands at the cusp of the new clean and digital industrial revolutions, Tees Valley is ideally positioned to lead the charge – and make sure our businesses, communities and local people benefit from our success.

By doing the same thing for clean energy and hydrogen that we historically did for steel and chemicals, local people in Tees Valley are changing the future. The region's long history in engineering and process industries means the foundations are already in place, and our compact industrial cluster gives it a real advantage when it comes to rolling out new low carbon energy projects at speed and scale. What really sets the region apart is how all the pieces are coming together.

Tees Valley's strengths in low carbon power, hydrogen and Carbon Capture and Storage are brought together in our – first of a kind – Net Zero Industrial Cluster. The **Tees Valley Cluster Plan** describes how we intend to unite our region's attributes into a coherent roadmap to deliver a low-carbon cluster by 2030 and to achieve the world's first net zero industrial cluster by 2040.

Combined with Tees Valley's Freeport benefits, deep water port access, and a workforce with generations of technical expertise who are determined, ambitious and innovative, the region offers a uniquely strong platform for any organisation (whether they be clean energy focused or not) looking to develop, test or grow clean energy projects.

Tees Valley is small but mighty, a region that gets things done quickly, with coordinated activity to make anything possible.

Our region's innovative approach to capitalise on opportunity and tackle challenges goes beyond our traditional strengths in chemicals, manufacturing and clean energy. Tees Valley is determined to be the UK's first truly Smart Region to create opportunities for all local people and businesses, ensuring every community is digitally connected and able to access education, employment and services with confidence wherever they live.

We have successfully deployed an Urban Traffic Management and Control system and the UK's first Traffic Digital Twin Project to maximise our road network and reduce delays – initial priority hotspots delivering an average 13.7% improvement in corridor journey times.

Our region is also mobilising the UK's first Digital Trade Testbed with the support of Teesside University to transform how we – and the UK – carry out global trade. These examples are just some of the proof we have that Tees Valley continues to be a region which innovates with purpose – which is as true today as it has ever been – making Tees Valley a prime location for the Industrial Revolution 4.0 and beyond.





TEESSIDE FREEPORT & INVESTMENT ZONE

Located in a region with a rich history of industry and innovation, Teesside Freeport – the UK’s first operational Freeport – builds on established strengths in chemicals and materials processing, biomanufacturing, offshore wind, and renewable energy.

As the UK’s largest Freeport by investment, it sits across Britain’s best connected trade region. The Freeport’s heart is Teesworks, a 4,500-acre area south of the river Tees primed for investment as the UK’s largest industrial zone – however the Freeport has locations in every corner of the region.

It encompasses one of the UK’s largest ports, alongside four additional ports, including the UK Ports Innovation Award 2026 winning Steel River Quay – a 450 metre quay purpose-built to support Freeport operations and the offshore sector. It also includes Teesside International Airport, offering global connections through flights to the major hub Schiphol, as well as FedEx’s airfreight handling facility.

Game-changing projects are already underway, including the UK’s first large-scale Carbon Capture and Storage project, Net Zero Teesside Power, and SeAH Wind’s £1billion investment in a monopile manufacturing facility located within a Teesside Freeport tax zone.

The Freeport aims to create thousands of jobs, while helping the area realise its ambition to become the UK’s first net zero cluster.

The region’s Freeport status means that investors can benefit from tax and customs incentives, which are particularly attractive to large exporting businesses. These include rates relief, stamp duty land tax exemptions and duty flexibility including exemptions and suspensions. It is also the location of the 5G Digital Trade Test Bed, driving international digital trade innovation.

Tees Valley is also home to an Investment Zone that is unique in its specialisation in the digital and creative industries. Tees Valley is one of only three areas in the country to be home to both an Investment Zone and a Freeport – recently combined by central government into an Industrial Strategy Zone to reflect their similar focus.



TEESSIDE DIGITAL TRADE TESTBED

International digital trade is now a significant driver of productivity and business growth in the UK. In 2019 the digital sector contributed £150.6billion to the UK economy and the UK’s remotely delivered trade with the world was £326billion – around one quarter of Britain’s total trade in that year. Globally, some estimates suggest that digital transformation investments could total \$6.8trillion between 2020 and 2023.

The International Centre for Digital Trade and Innovation (iC4DTi), based at Teesside University, is a global initiative that will see the creation of a modern, digital trading system that is cheaper, faster, simpler and more secure for businesses. Trade transactions can happen in real time, reducing trade frictions.

The new Teesside Digital Trade Testbed has a private 5G network covering a significant area of Teesside International Airport’s northern estate to help test and trial digital trade innovation in a controlled environment. It is equipped with Internet of Things sensor networks, secure data integration platforms, and edge compute capability to link

physical cargo movements with live digital trade data. Its findings will inform the UK Border Strategy, delivering large-scale cost and time savings while shaping digital trade policy and digital inclusion in global supply chains.

It is also leading work testing and verifying autonomous vehicles as part of the CAM Testbed UK. It is using cutting-edge digital twin technology to trial autonomous vehicles to serve passengers and luggage.

“The Teesside Digital Trade Testbed is a world-leading asset and set to be a critical part of the UK’s innovation ecosystem. I’m not aware of anywhere else like it in the world, so it’s fantastic to see it up and running and showcase it to industry. This will play a key part in bringing trade and commerce into the 21st century and firmly establish Teesside at the centre of that transformation.”

Chris Southworth, Secretary General of ICC UK and Co-Founder of iC4DTI

THE REGION WHICH HAS IT ALL...

Tees Valley forms a compact, well connected, functional economic geography with significant economic assets. Covering more than 300 square miles and being centrally located on the UK's east coast between Edinburgh and London, Tees Valley is perfectly placed for investment. Our region is home to 713,000 people and made up of the five boroughs of Darlington, Stockton-on-Tees, Middlesbrough, Hartlepool and Redcar & Cleveland that collectively contribute £18.9billion to the national economy.

Significant investment has already been made across our boroughs to ensure the region has the infrastructure to support major investments and continue being an industrial powerhouse.

Development projects have been completed, and are continuing, at an extensive range of sites and premises, including the £55million Tees Advanced Manufacturing Park (TeesAMP). The region's supportive infrastructure also includes multiple deep-water sites, one of the UK's busiest ports, access to utilities, including uninterrupted water and competitively priced low-carbon power.

The regional commercial property market provides the industrial and office development space needed to support growing businesses and new investments. This is coupled with established local supply chains and clusters of successful companies across processing, manufacturing, energy, and digital sectors, giving Tees Valley businesses a competitive edge.

It is no surprise, therefore, that a recent national study ranked Darlington, Middlesbrough and Stockton-on-Tees in the top 15 areas for business survival rates. This is proof that our region is not just starting businesses – we are growing them, backing them and making sure they last.

Our region is one of opportunity, which goes hand in hand with exceptional quality of life. The average house price across Tees Valley was £155,000 in Q1 2024, compared to £280,000 nationally.

With strong rail, sea, air and road connections the region offers an accessible base for business and travel, while providing open leisure space just minutes from our town centres.

The River Tees and North Sea coastline help define the landscape and identity of the area, with beaches, riverside walks, cycling routes, water sports and access to the North York Moors all close at hand. This creates a distinctive and dynamic landscape shaped by our industrial heritage, agricultural use,

and diverse natural assets which combine to create a varied ecological network. Tees Valley is also home to Middlesbrough Football Club, with their home ground at the Riverside Stadium. Our towns each have their own character, with independent shops, cafés, restaurants, markets, cultural venues, festivals and events creating lively places to spend time as a resident, student, worker or visitor.

This regional offering contributes to a growing hospitality, leisure and visitor economy, which also includes accommodation and heritage attractions. In 2025 alone, this attracted 21.3million people to the region, contributing £1.523billion to the regional economy.

Tees Valley also has a noticeable education offering. Nine out of ten Tees Valley primary schools have been either good or outstanding. We also have high performing secondary and independent schools and colleges with plenty of renowned further education options such as, technical training providers NETA and TTE. There are plenty of apprenticeships and support schemes which create pathways for our

young people. The region is also home to Teesside University and within easy reach of another six universities, four of which are Russell Group.

Not many areas allow you to live less than 30 minutes from outstanding coastline and countryside, picturesque villages and charming market towns and the office. With a high quality of life and low cost of living, the perfect work-life balance is easier to find when you live in Tees Valley.

Our strong sense of community, growing cultural and leisure offer, and easy access to the wider North East and Yorkshire means Tees Valley offers a balanced and attractive place to build a career, raise a family and enjoy life outside of work.

Tees Valley is the ideal place to live, study, work, invest and visit.

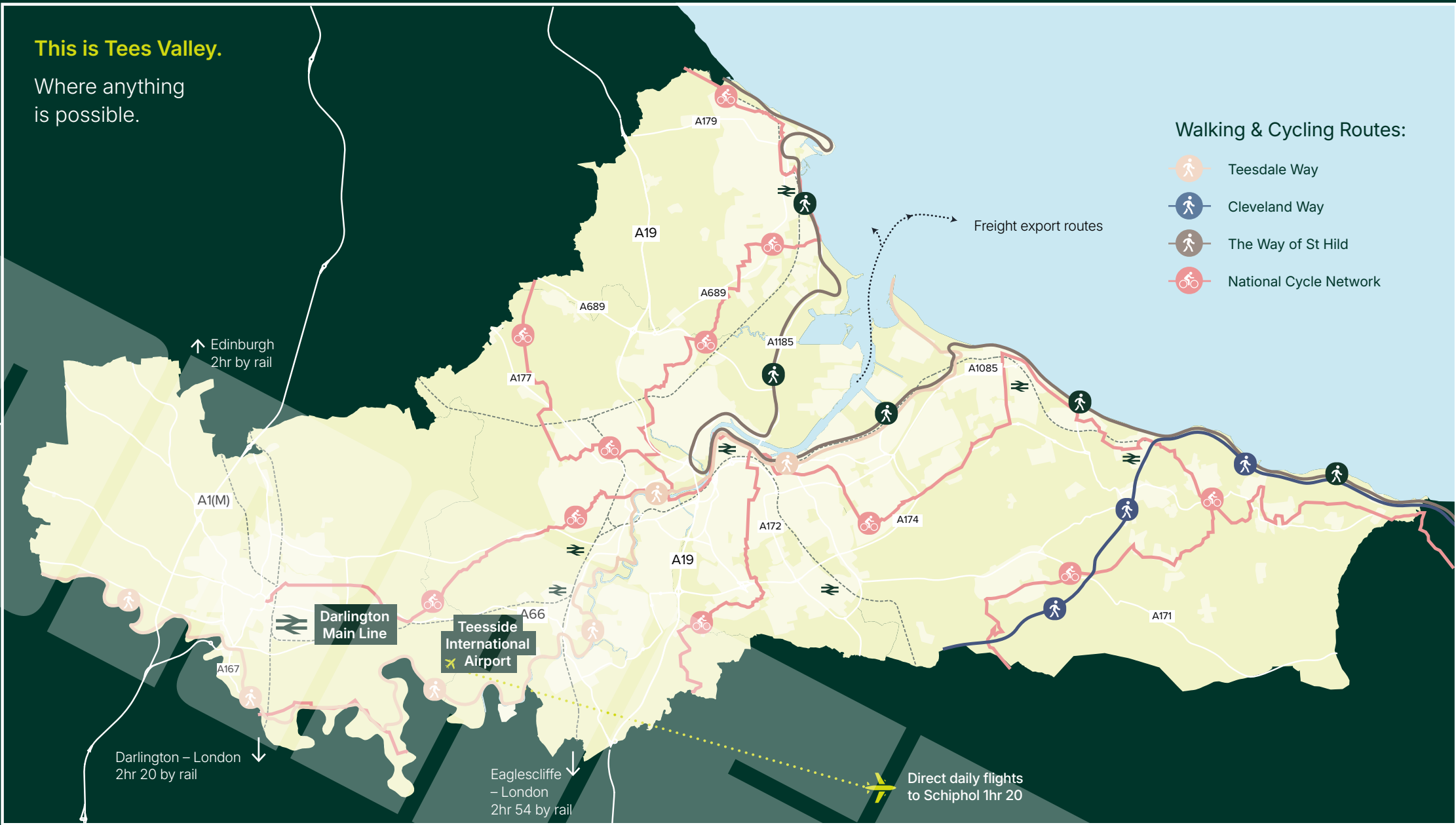


REGIONAL OFFERING



This is Tees Valley.

Where anything is possible.



Walking & Cycling Routes:

- Teesdale Way
- Cleveland Way
- The Way of St Hild
- National Cycle Network



Home to leading research institutions and a reputation for innovation and industry



Our businesses have the highest percentage of turnover in the UK from new product introduction



Largest combined industrial and municipal effluent plant in the UK at Bran Sands



Served by several airports, with Teesside International Airport offering daily flights to Schiphol



Excellent transport links with national and international connectivity via road, rail, sea and air



The East Coast Main Line at Darlington enables a direct journey to central London and Edinburgh



Home to the UK's largest industrial zone



Home to Government's Darlington Economic Campus



Home to the deepest port on the east coast of England



Selected as the first place in the UK as Amazon's drone delivery service



Home to the UK's largest private-wire electricity distribution network



Near-universal superfast broadband – higher than the UK average – and rapid 5G rollout



Situated nearby key universities including; Teesside, Durham, Newcastle and York



Three out of our five boroughs are in the top 15 for business survival rates



63% of UK distribution and manufacturing centres within four hours



Kielder Water is the UK's largest artificial reservoir. Providing uninterrupted access to water supply.



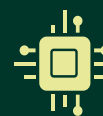
Four national parks within 1.5 hours drive



A regional Mayor with devolved powers



2.5million people located within an hour's drive



We are at the vanguard of deploying smart digital infrastructure



Home to the first and most successful Freeport and the UK's only digital and creative Investment Zone



Nine out of ten primary schools are either good or outstanding by Ofsted



One of the most affordable places to live in the country. Affordability of median house price to earnings ratio is 4.8 compared to 8.3 nationally



Birthplace of the modern railway which sparked the industrial revolution

WITH LOTS TO SEE & DO...

In recent years, our region has welcomed massive music events such as Radio 1's Big Weekend, concerts by Take That, The Killers, Arctic Monkeys and James Arthur, and as an official Eurovision 2023 partner. Alongside Middlesbrough FC's fixtures, it has hosted sporting events like Lloyds Tour of Britain, British Cycling National Road Championships, Rugby League World Cup and the Great North CityGames.

New and existing attractions and venues are bringing huge opportunities our way. The Middlesbrough Institute of Modern Art was named host of the 2026 Turner Prize, Darlington's rail heritage attraction Hopetown has become a multi-award winner, with Hartlepool's National Museum of the Royal Navy spotlighting our maritime history. Elsewhere venues across the region secure the biggest names in music, comedy and theatre so there's always something to do.

Funding and support has also helped significant local festivals flourish, including the world-renowned Stockton International Riverside Festival (SIRF), Festival of Thrift, Middlesbrough Mela and more. Further investment is turning the region into an engine room of cultural production, backing local musicians, artists, creators and makers and helping put them on an international stage.

Food and drink is a major visitor draw, with well-known regular markets and festivals like Middlesbrough's Orange Pip and Saltburn Food Festival. You can enjoy regional delicacies such as the Parmo and Lemon Top ice cream alongside towns and villages which are nestled between stunning coastline and beautiful countryside bursting with independent and boutique cafes, bars and restaurants.

Tees Valley's Local Visitor Economy Partnership status has unlocked new support opportunities for the region's tourism offer from the likes of VisitEngland, with greater local, regional and national collaboration. It means our area can go toe-to-toe with other areas including Manchester, Liverpool, County Durham and Northumberland to drive our tourist economy forward.

All this has seen Tees Valley record the highest Visitor Economy figures since 2018, with a total economic impact of £1.523billion in 2025 – up by £141million on the previous year. This is boosting jobs, increasing footfall and driving our local businesses and high streets forward.

Tees Valley's leisure and tourism sector – and its related visitor economy – is thriving like never before and continues to grow. With the region now firmly in the global spotlight, we're ready and able to capitalise on our experience and reputation to grow our local tourism offering while delivering more big-ticket events to benefit local people, visitors and businesses.

Scan here to find out more about Visit Tees Valley



Key Metrics STEAM Data



Visitor Numbers
21.3million



Visitor Expenditure
£1.122billion



Visitor Days
24.64million



Overnight Visitors
2.32million



Economic Impact
£1.523billion

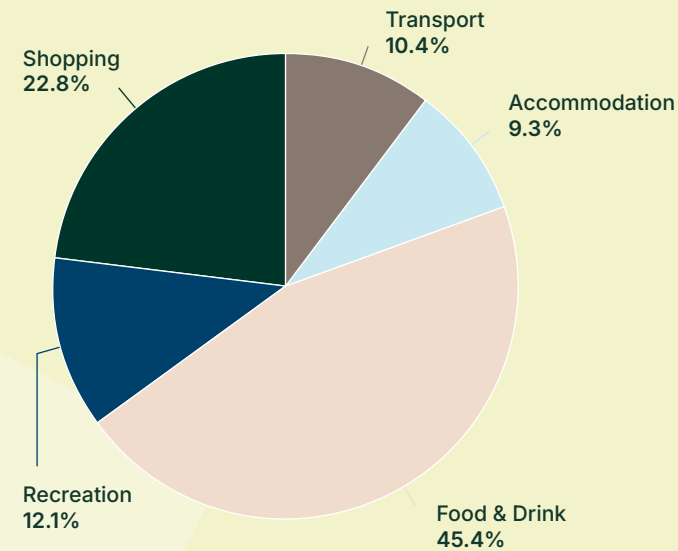


Food & Drink
£510million
Biggest economic contributor



Jobs in Tourism
13,488

Economic Contribution



Five unique boroughs. One remarkable region. This is Tees Valley. Where anything is possible.

Home to a landscape that's
breathtaking and dramatic.

Where the beauty of the countryside,
meets the serenity of the coast.

And where our diverse town
centres are alive with culture.

An area united by a history of
industry and innovation, passed
on from generation to generation.

Where our adaptive, resilient and
down to earth nature stands proud.

And where grit, determination and
transformation form part of our DNA.

Today, we're carrying the same flame that
lit the first friction match, from the place
that built the world and kept it on track.

We're setting sail on a new journey, guided
by an enduring spirit of opportunity.

This is a corner of the North East
that's shaping its own future.

Where the next generation of creators,
makers and doers are defining tomorrow.

And where boundaries are being
pushed like never before.

A land of hard grafters, fine
crafters and good laughers.

A region that's surprising, inventive,
and unstoppable all at once.

**This is Tees Valley.
Where anything is possible.**





OUR VISION

The Tees Valley is the UK’s most confident, distinctive and delivery-focused region – known for combining industrial scale, digital creativity and quality of life in a way few places can match.

It is a place that people choose to live well, build businesses, invest with confidence and to be part of something that is moving forward. Specifically, the Tees Valley is:

The Place That Gets Things Done – Tees Valley is defined by action

- Doing business here is easy.
- We are a region that turns ambition into delivery, at pace and at scale.
- Major investment, nationally significant infrastructure and transformational projects have been enabled by a culture of pragmatism, partnership and speed. In the Tees Valley we do not wait for opportunity, we make it happen.
- This capability is a core competitive advantage and will remain central to future growth.

The Place of Invention and Reinvention – Tees Valley has always been shaped by innovation

- Our future builds on that history - not by repeating the past, but by reinventing it.
- Advanced industry, clean energy, digital and creative sectors sit alongside one another, forming a resilient and diverse economy. Industry is not something to move on from, but something to evolve - providing skilled jobs, strong identity and sustainable futures.



One Economy, Many Strengths – Tees Valley functions as a single, connected economy where partnership matters

- Our towns and communities are different in character, but united by shared purpose. People, businesses and ideas move freely across our region, reinforcing each other’s strengths. Growth is driven by collaboration, not competition.
- We are one region - the whole is greater than the sum of its parts and the proceeds from success are realised and experienced everywhere.

Quality of Life as an Economic Asset – quality of life is not peripheral – it is fundamental.

- In Tees Valley we offer a rare combination of affordability, accessibility, culture, nature and community. People can live close to work, reach coast and countryside in minutes, and be part of places with character and pride.
- This quality of life underpins productivity, supports talent attraction and retention, and makes Tees Valley a compelling alternative to more congested city regions.

A Confident, Outward-Facing Region – Tees Valley is known for its confidence and ambition.

- We are a proud region and tell our story clearly and consistently, led by businesses, communities and residents. Negativity is replaced by pride, and challenge by ambition.
- Our future is not defined by what Tees Valley has lacked - but by what it delivers.





NATIONAL POSITIONING

CHEMICAL & PROCESS

Tees Valley has a long, rich chemical industry history beginning in the 1830s which has resulted in the region becoming a global leader for the sector, with one of the most significant integrated industrial economies in the world.

The story began with the extraction of salt in Middlesbrough and significant investment largely led by Imperial Chemical Industries. This industry grew rapidly thanks to community and political support, and a willingness to invest and build an interconnected chemical cluster, with one manufacturer's product being the feedstock of another's.

The chemical industry was joined by iron and steel works, when iron ore was discovered in the 1850s. Businesses stretched from Middlesbrough to Redcar, leading to Teesside Steelworks following early innovations by the likes of Middlesbrough Ironworks, Bolckow, Vaughan & Co Ltd and Dorman Long.

Today, the region remains the largest and most compact chemical complex in the UK, and the second largest in Europe in terms of manufacturing capacity. The complex benefits from strong supply chain relationships, knowledge sharing between sectors, and research, development and innovation assets.

Our main exports include petrochemicals, polyethylene terephthalate (PET), fertiliser, pigments and speciality chemicals. These underpin national manufacturing supply chains and domestic foundations – the chemical sector is foundational to the national economy and to us here in Tees Valley.

The region's chemical industry is concentrated across a relatively small area with a well-developed infrastructure and a skilled, dedicated workforce supported by experienced educational settings and skills providers. The three main sites of Wilton International, Billingham, and Seal Sands & North Tees run approximately 12 miles east to west either side of the River Tees and contain major international

companies, such as Alpek Polyester, Lianhentech, Conoco Phillips, CF Industries, Marlow Foods Ltd (Quorn) and KP Snacks, with other notable businesses located in the region such as Glanbia Performance Nutrition and Tees Valley Lithium.

These companies are well served by Teesport, the Ports of Hartlepool, Redcar Bulk Terminal and Port of Middlesbrough. The former of which provides businesses with the sixth largest maritime complex, world-class infrastructure and facilities and unparalleled connectivity to key global markets. PD Ports – who operate Teesport and the Port of Hartlepool – have the ambition to create the UK's most successful port region.







WILTON INTERNATIONAL

Wilton International is a 2,000-acre, multi-occupancy manufacturing site located within Teesside Freeport and in the heart of Teesside's industrial area – home to one of the UK's leading process manufacturing clusters.

For investing, energy intensive industrial businesses, Wilton International integrates ready-to-go energy, development land, infrastructure, utilities and security, enabling manufacturers to realise significant savings.

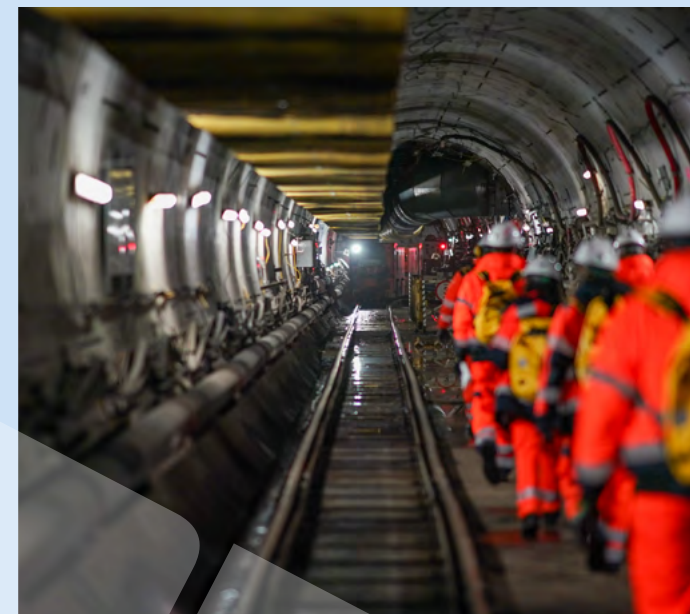
Major businesses established at Wilton International include Ensus, Alpek Polyester UK, Huntsman, Sembcorp Energy UK, Biffa Polymers, Nippon Gases and Anglo American.

Wilton International's on site power generation units and the UK's largest private wire electricity network delivers reliable, resilient and cost savings for businesses with large energy demands.

It offers large-scale, pre-consented, 'plug and play' land for industrial development – enabling investing businesses to deliver projects quickly and cost-effectively.

Adjacent to Wilton International is the Wilton Centre, one of Europe's largest research and development facilities, housing a number of leading global and regional businesses in chemical, manufacturing, material and life sciences. It offers flexible laboratories and scale-up facilities, offices and pilot plant accommodation. It is ideally suited to growing businesses seeking to harness the region's legacy knowledge to create sustainable manufacturing practices for the biotech products of the future.

This all makes the site a prime location for the future of decarbonised power, offering direct access to a skilled workforce alongside potential Freeport tax incentives.



THE WOODSMITH PROJECT

Anglo American is currently developing what will become one of the world's largest fertiliser producing mines, located in Tees Valley and North Yorkshire.

Since construction started in 2017, the project has already added £1.94billion to the regional economy, generated £34million of social investment to support local projects and become a major local employer. 1,000 people are working on the project, with 450 of these being from Tees Valley. They have an active Thriving Communities Programme and Woodsmith Foundation which are doing great work in the North East and Yorkshire.

The site was chosen due to its proximity to abundant polyhalite deposits and port handling facilities in Tees Valley. The mine will have a full production capacity of c.13million tonnes per

annum, with the product – POLY4 – helping to increase crop yields, support soil health and limit emissions.

The product will be processed at a Materials Handling Facility on the Wilton International site, before being shipped to key global markets from a purpose-built port facility on the River Tees.

Anglo American's Woodsmith project will help the UK to become a major global fertiliser producer – driving growth, creating high value jobs and generating large-scale exports – and a leader in sustainable food production, one of the most pressing challenges facing the world today.



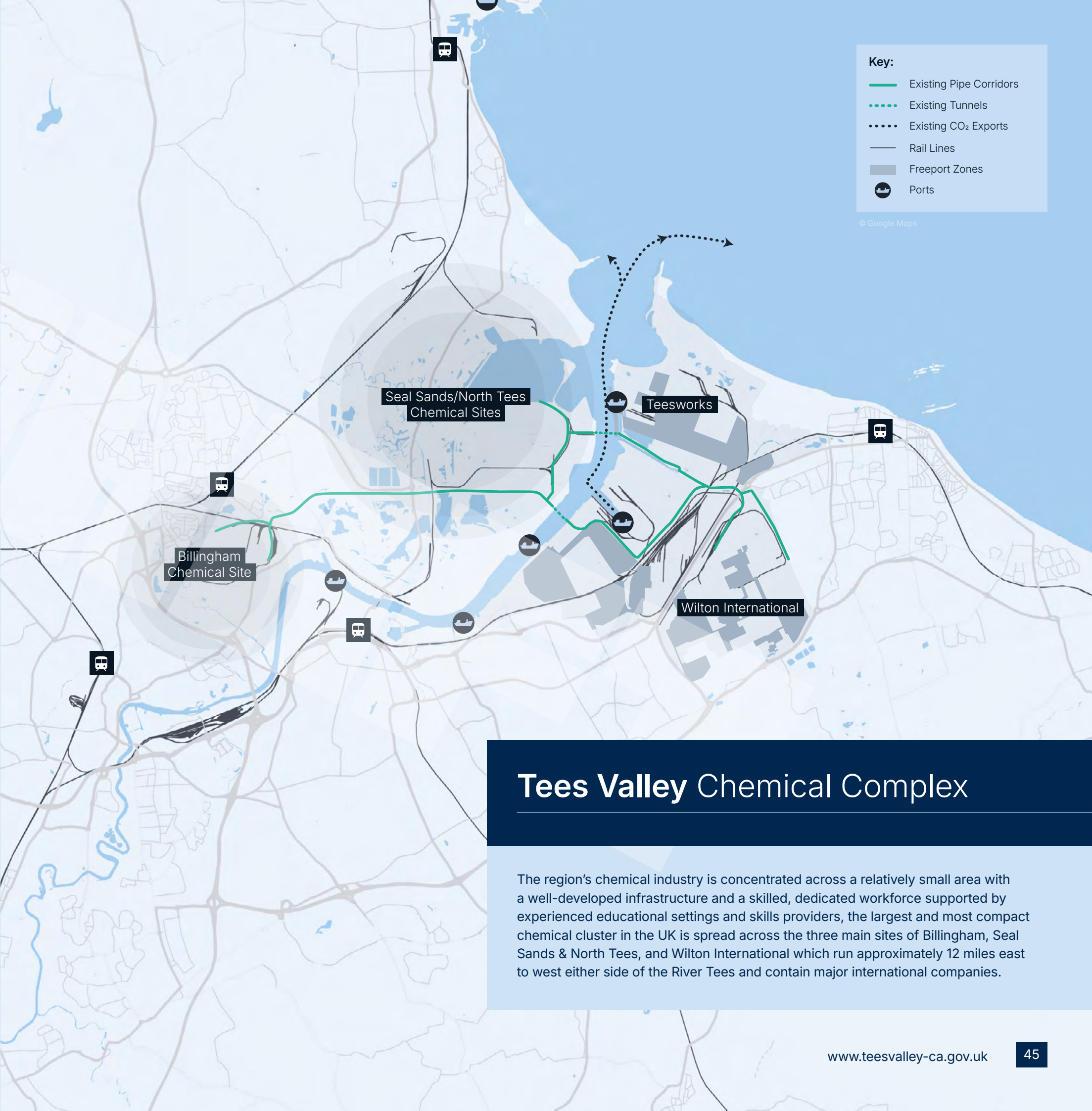
NATIONAL POSITIONING

The significant generational knowledge and skill which has built up in the region has enabled Tees Valley to lead the way as we build a greener economy and develop new-to-world products in chemicals, clean energy, medicines, novel foods, agritech, and sustainable materials and fuels.

Tees Valley Combined Authority is now partnered with York & North Yorkshire Combined Authority, the University of York and Teesside University to form the BioIndustrial Cluster North. Collectively, we have the vision to establish the UK as a global leader in the industrial bioeconomy by harnessing the combined strengths and assets of Tees Valley and York and North Yorkshire. In practice, this partnership represents collaboration between scientific excellence and industrial scale-up to drive the UK's transition to bio-industrial advanced manufacturing in sustainable materials and chemicals – delivering national and global impact for the UK.

Green Lizard Group, for instance, is hard at work developing and manufacturing sustainable power-to-liquids to create green fuels and chemicals within a dedicated, zero carbon ecosystem at their site in North Tees. Sustainable chemicals being produced in Tees Valley include e-methanol, bio-ethanol, e-ammonia and sustainable aviation fuel which are crucial alternatives to fossil fuels currently used in sectors which are hard to abate, such as maritime, chemical manufacturing and aviation. Ensus, who operate one of Europe's largest renewable ethanol production plants at Wilton International, were given £100million by the Government due to its strategic importance in the production of bio-ethanol (E10) for road vehicles and biogenic CO₂ for the food, beverage and healthcare industries Mura Technology's subsidiary ReNew ELP are building the world's first Hydro-PRT advanced plastic recycling site in Tees Valley.

Tees Valley boasts these chemical capabilities alongside nearby clean energy sources – one of just a handful of locations that offer this across the UK. It is for these reasons that Tees Valley was selected by the Government as one of two clusters to lead efforts to demonstrate Carbon Capture and Storage at scale. This, alongside the development of sustainable chemicals, provides a clear pathway to decarbonisation, securing the chemical industry's future and strengthening economic and national security.

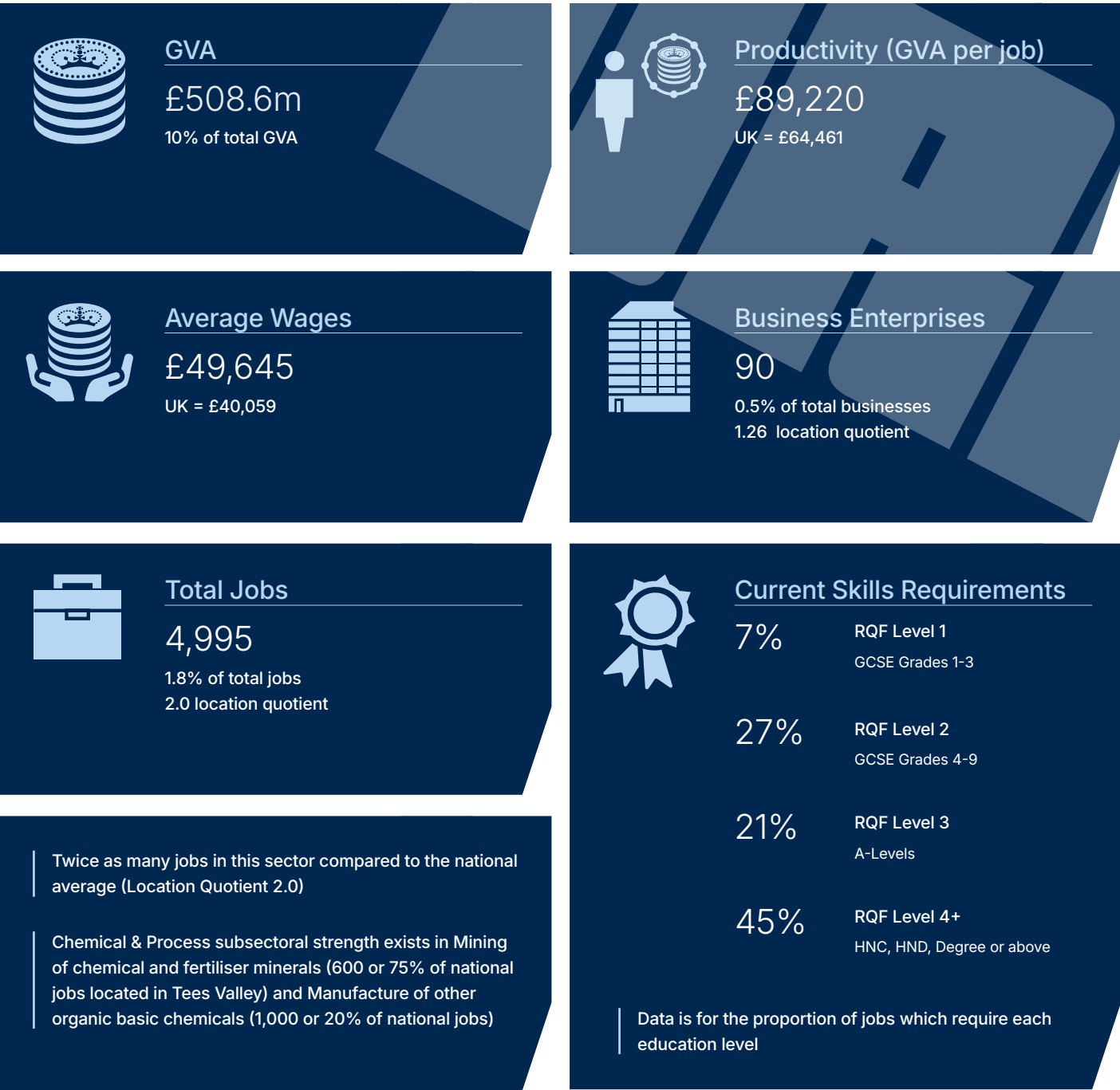


Tees Valley Chemical Complex

The region's chemical industry is concentrated across a relatively small area with a well-developed infrastructure and a skilled, dedicated workforce supported by experienced educational settings and skills providers, the largest and most compact chemical cluster in the UK is spread across the three main sites of Billingham, Seal Sands & North Tees, and Wilton International which run approximately 12 miles east to west either side of the River Tees and contain major international companies.



Key Metrics Chemical & Process



Source: Lightcast 2025.1, ONS



CLEAN ENERGY

Clean energy sources on our doorstep come as a direct result of Tees Valley's ideal positioning, both geographically and industrially. It means our region can support the transformation of our energy system and economy, with the aim of increasing energy security and sovereignty while reducing energy bills and emissions.

It is more than just our positioning which makes Tees Valley ideal. Our region is home to communities with generational expertise in specialisms such as complex fabrication – a key skill in wind turbine production – and experienced, knowledgeable professional and business services with subject matter knowledge in the likes of asset management and inspection. Put simply, Tees Valley is primed to capitalise on the global clean energy transition – the economic opportunity of the century.

The UK is already taking advantage of this by being a world leader in offshore wind, with the North East of England being home to what will be the world's largest Offshore Wind Farm. The strong project pipeline and existing supply chain strengths are being built right here in Tees Valley. As part of Energi Coast – the North East's offshore wind cluster – we have established ourselves as a major centre for offshore wind manufacturing, directly supporting national ambitions to go further.

"Each gigawatt of new offshore wind adds £2-3billion of value to the UK economy and the sector supports over 30,000 jobs."

RenewableUK

The region is a designated Offshore Manufacturing Centre and has UK Government Centre for Offshore Renewable Engineering status, recognising our existing port infrastructure, skilled workforce and experienced local supply chains Able Seaton Port, for instance, are a major Offshore Wind Project Port operator and are the market leader in the field of demolition and marine decommissioning.

In 2025, SeAH Wind's giant £1billion offshore wind monopile foundation production facility became operational, with exports shipping from the adjacent £114million Steel River Quay to locations in the North Sea.

The development cements Tees Valley's role in the UK's offshore wind supply chain and will create thousands of jobs across manufacturing, engineering and logistics, marking a significant step in the region's clean energy transition. There are also direct economic returns, with offshore wind exports amounting to more than £2billion a year, according to a recent study by the Office for National Statistics.

TEESWORKS OFFSHORE WIND HUB

Tees Valley's ambitions to become the UK's premier offshore wind hub are well under way. Developments are taking place on the Teesworks site to create 4.5million sq ft of advanced manufacturing and industrial space across 450 acres of the site, becoming home to cutting-edge offshore wind companies.

The region's Offshore Manufacturing Centre designation and UK Government CORE status enables rapid growth in the offshore wind sector.

There are around ten miles of operational river along the Tees, including the deepest port facilities on the East Coast and England's largest

exporting port. Tees Valley is in close proximity to strategic offshore wind sites and has access to around 10GW of wind farm development.

2.5 GW already comes on shore from Dogger Bank C and Sofia Wind Farms via the Lackenby Substation near Wilton International to feed into the national grid.



TEESWORKS



NATIONAL POSITIONING

“The UK has strengths across the fission life cycle including fuel production, new build, decommissioning, professional services, and specialised equipment manufacturing. The UK is well positioned to build upon existing strengths and seize opportunities provided by new technologies.”

The UK’s Modern Industrial Strategy

Our region is no exception when it comes to seizing the opportunities of new technologies. Tees Valley is already home to a nuclear power station in Hartlepool that accounts for 2% of Great Britain's peak electricity demand, which also has significant nuclear licensed land available for development and an existing, experienced workforce. X-energy and Centrica intend to capitalise on this and have signed a development agreement to develop a fleet of 12 Advanced Modular Reactors near the site. Hartlepool Nuclear Power Station also represents a century of decommissioning potential when it reaches its end of generation in March 2028.

Community Nuclear Power’s project in Tees Valley is arguably the UK’s most advanced privately funded Small Modular Reactor deployment. The reactors will be based on land owned by Green Lizard Group and supply clean, reliable baseload power to support long-term industrial growth and inward investment.

Further major developments are expected, including significant progress on the £4billion Net Zero Teesside Power, the world’s first gas-fired power station with Carbon Capture and Storage capabilities produced by a consortium led by BP and Equinor. The region already imports and processes around 25% of the UK’s natural gas, which is then used as feedstock to fuel power stations and possible future blue hydrogen production.

There is the potential for the UK to become the CO₂ storage hub for Europe, and the East Coast Cluster and Northern Endurance Partnership are key to this. The Carbon Capture and Storage availability being developed in Tees Valley is co-located with green energy and hydrogen production, enabling the decarbonisation of existing industrial assets and new opportunities in sustainable bio-based manufacturing, new fuels and net zero supply chains – it is not just about decarbonising and capturing the emissions from energy production but also investing in new forms of energy.



EAST COAST CLUSTER

Carbon Capture and Storage is widely acknowledged as the only viable technology able to reduce industrial CO₂ emissions and achieve cost-effective decarbonisation across industry.

Net Zero Teesside Power will be the anchor project to deliver this by forming a hub of decarbonised industries, who will share the CO₂ storage infrastructure being developed by the Northern Endurance Partnership to serve the East Coast Cluster.

The East Coast Cluster is bringing together communities, business, industry and academia to deliver the infrastructure needed to decarbonise key industrial sites of the UK in Tees Valley and the Humber.

In total, the East Coast Cluster has the potential to remove half of the UK’s industrial CO₂ emissions, establishing a globally-competitive climate-friendly industrial hub for industry and innovation – protecting jobs and the planet.

Read more at www.eastcoastcluster.co.uk

EAST CO₂AST CLUSTER



NATIONAL POSITIONING

"Hydrogen plays an important role in achieving the UK's clean energy and net zero transition, and in securing the UK's energy independence." "It is vital for the decarbonisation of hard-to-electrify industrial sectors and heavy transport."

The UK's Modern Industrial Strategy

The emerging hydrogen market alone has the potential to be worth more than \$1 trillion a year by 2050, according to Deloitte and Tees Valley has long been established as the UK's premier investment destination for the gas.

Boasting an operational hydrogen grid and storage capability, the region is well placed to produce the hydrogen volumes needed to power industry, with significant quantities of the UK's hydrogen already being produced here.

That momentum is being strengthened even further by East Coast Hydrogen, a major programme that will link Tees Valley with the Humber, Yorkshire and the East Midlands through a combination of new and repurposed pipelines. This will create the essential backbone for moving hydrogen across the North of England and connecting producers, storage operators and end users in a way that makes the whole system more robust, reliable and future ready to match supply and demand. East Coast Hydrogen alone could enable connections of up to 5 GW of hydrogen production capacity and multiple large scale storage facilities, creating a strong network that supports both industry and new investment.

As well as hydrogen production, Tees Valley is leading the way in its innovative application – being selected as Government's first ever hydrogen transport hub. Funding from central government has allowed the region to develop hydrogen-powered ground-based support vehicles and hydrogen refuelling stations at Teesside International Airport, decarbonise grocery deliveries and to launch a competition to help local colleges run hydrogen skills training. This is not a hypothetical – it is a reality taking place in Tees Valley right now.

Projects are also underway in our region which combine our strengths and assets in industrial scaling alongside hydrogen production, captured CO₂ and other feedstocks into sustainable aviation fuel. Several local firms have been backed by national funding and investment, recognising that businesses in Tees Valley are leading the way – putting us on the map as the UK capital for creating sustainable aviation fuel.

Tees Valley businesses continue to demonstrate what is possible by setting the standard again and again in how we generate power from low-carbon sources. In 2007, Sembcorp opened Wilton 10, the UK's first large-scale wood-to-energy power station, supplying electricity equivalent to around 30,000 homes. This was followed by Wilton 11, commissioned in 2017 as an energy-from-waste facility, and together these power stations now save around 330,000 tonnes of carbon emissions each year. This legacy is being built on by the likes of MGT Teesside who have published proposals for the world's largest purpose-built biomass power plant – the Tees Renewable Energy Plant will generate nearly 300MW of power to supply 600,000 homes.

Power is also being produced in other innovative ways. Northumbrian Water, for instance, is undertaking groundbreaking innovation at their Bran Sands Advanced Anaerobic Digestion facility in Middlesbrough following the discovery of a unique microalgae. Following successful testing at smaller volumes, Northumbrian Water are now scaling up the approach to provide full treatment of digested sludge liquor while reducing treatment costs, enhancing biogas production and reducing their carbon footprint.

Our region is also making the most of other forms of waste. The Tees Valley Energy Recovery Facility is a prime example of this. The project aims to support partner authorities – which include all local authorities in our region – to meet their ambitions to send zero residual waste to landfill by providing a solution for treating region's general rubbish and turning it into energy.



SUSTAINABLE AVIATION FUEL

Tees Valley is rapidly becoming the go-to region for research and development into Sustainable Aviation Fuel (SAF) and, coupled with Teesside International Airport's net zero ambitions, an ideal environment to promote its uptake.

As a prolonged unstable geopolitical situation continues to produce volatile markets around traditional fuel options, and with air travel being a major contributor to carbon emissions, the aviation industry is increasingly shifting its focus to SAF. This converts sustainably sourced products such as biomass into aviation fuel, also potentially generating renewable raw materials like naphtha for the petrochemical industry as a co-product.

Recent government funding has seen seven local firms awarded a total of £65million into SAF R&D development, which could result in hundreds of millions – or even billions – of future investment in the region.

One such scheme is Alfanar's Lighthouse Green Fuels in Seal Sands, which is set to produce 180m litres of SAF each year, enough to offset 27,000 short-haul flights or 4,500 transatlantic flights annually, from what will be one of the largest

second-generation SAF plants globally. When operational, it is expected to create more than 600 roles in the region, 300 direct roles at the site and more than 3,400 full-time equivalent jobs across the UK.

SAF is central to Government's Advanced Manufacturing Sector Plan, with its focus on decarbonising aerospace technologies and delivering more efficient technologies to reduce carbon emissions and make air travel more sustainable. Locally, it also connects heavily with our skilled and robust Chemicals and Process sector both in the production of SAF and the use of its co-products.

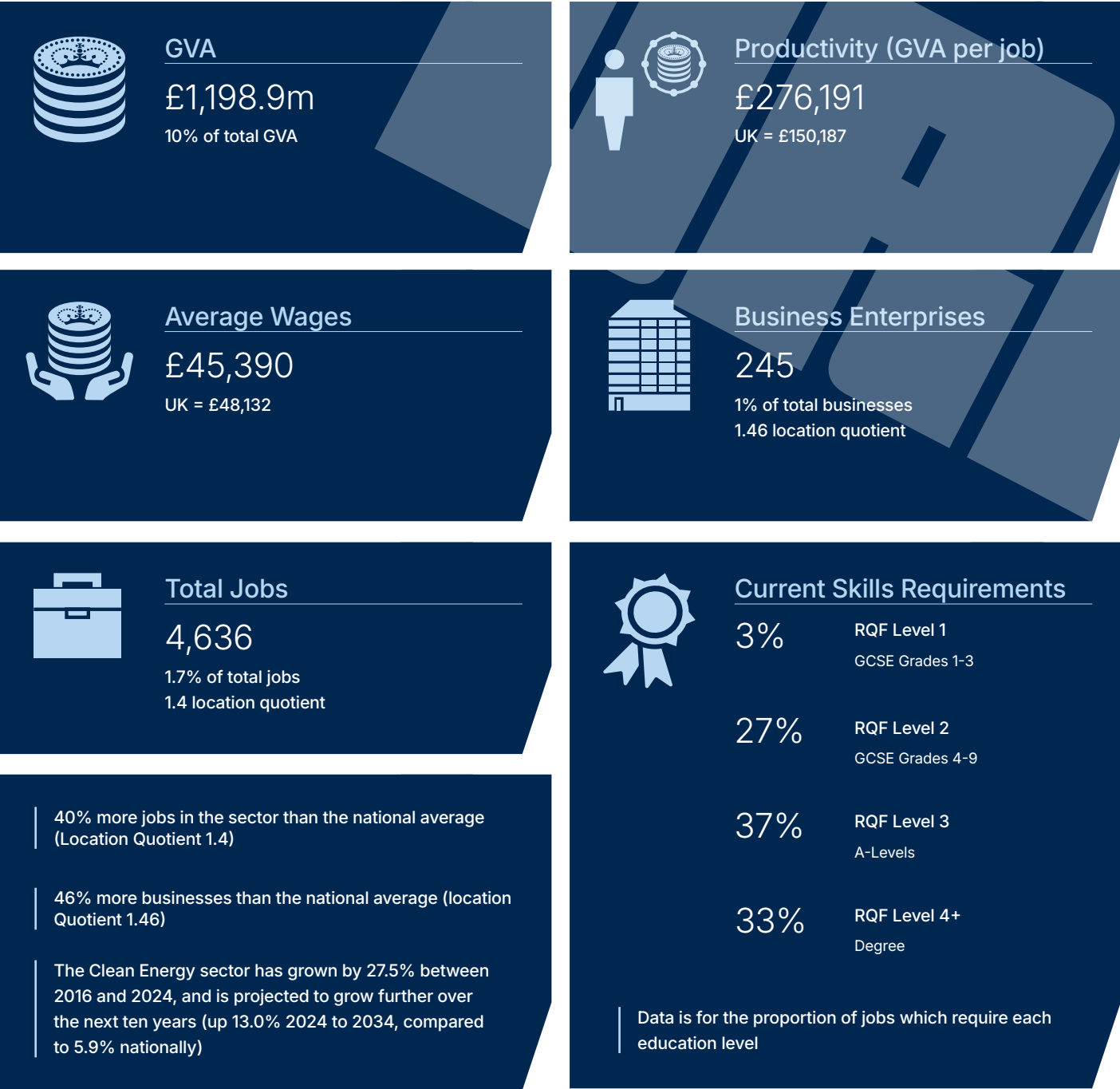
Additionality comes in the form of Teesside International Airport. The airport is increasing the number of destination while developing its associated Airport Business Park, offering airside access to one of the UK's largest and most integrated industrial economies. Its net zero strategy seeks for the airport to be operationally net zero – including flights – by 2035. It will work with the firms developing SAF in Tees Valley on its testing, adoption and promotion.



Scan here to find out more about Teesside International Airport Business Park



Key Metrics Clean Energy



Source: Lightcast 2025.1, ONS



LIFE SCIENCES & BIO MANUFACTURING

The UK's demand for new forms of clean energy is happening in tandem with growing calls for bioderived materials, lower carbon food, new medicines and the circular economy.

“Tees Valley demonstrates all the major elements of the circular economy, from recycling steel from decommissioned oil platforms to using CO₂ from industry for soft drinks, through energy from waste in industrial processes to anaerobic digesting using industrial effluents.”

Innovate UK Tees Valley Local Action Plan

Our region's strengths and assets in the Chemical and Process and Clean Energy sectors are complemented by our Life Sciences and Bio Manufacturing sector. This sector can be demonstrated by CPI's National Biologics Manufacturing Centre and RNA Centre of Excellence which are co-located with Teesside University's National Horizons Centre on Darlington Science Park.

These are complemented by businesses and facilities in around and nearby the Wilton Centre and North Tees, including FUJIFILM Biotechnologies and Marlow Foods Ltd. The latter of which produces the Quorn mycoprotein from a fungus known as *Fusarium venenatum* into a more sustainable and nutritious protein source. The number one performance nutrition brand in the world, Glanbia

Performance Nutrition, manufacture and develop many of their well-known products from their facility in Middlesbrough. Taken together these assets and businesses enable companies to develop cutting-edge products and processes, innovate and manufacture new products that will improve the quality of life of people around the world. Put simply, Tees Valley is a key location for biosciences.



NATIONAL POSITIONING



FUJIFILM BIOTECHNOLOGIES

Fujifilm is of the UK’s leading biopharmaceuticals manufacturing campuses, specialising in the development and production of biologics, vaccines, advanced therapies and microbial-based biomanufacturing.

Its Billingham site serves as its process development and microbial centre of excellence, which has undergone considerable expansion. A new BioCampus was established in 2021, including purpose-built office accommodation and visitor centre, unlocking land for further development.

In 2026 it launched its £400million premises, which is home to Borealis – the largest single-use Contract Development and Manufacturing Organisation facility in the UK. It introduced new bioreactors to provide small and mid-scale antibody manufacturing, alongside its Bioprocess Innovation Centre (BIC UK) which provides continuous process development.

Its sites at Billingham and the Wilton Centre R&D facility employ more than 960 people – the majority of its 1,700 UK employees.

FUJIFILM
Value from Innovation FUJIFILM Biotechnologies

DARLINGTON SCIENCE PARK

Darlington’s Science Park, centrally located next to the town centre and train station is home to some of the biggest developments in biosciences in the region.

As one the UK’s leading independent technology innovation centres, CPI was selected to be the home of the National Biologics Manufacturing Centre, and the £38million centre is helping UK companies develop a competitive foothold in the growing market for biologics. It promotes industry collaboration across the supply chain, from research through to manufacture and commercialisation.

The site is also home to Teesside University’s £22million National Horizons Centre – a nationally significant, purpose-built asset designed to address

UK technology sector growth through the provision of world-class facilities and equipment for hands-on training. It specialises in biodiscovery, digital health, medicine manufacturing, sustainability and innovation to optimise efficiency and quality in the bioeconomy supply chain. The 30-hectare business park has land available for further commercial development opportunities.

After securing £16million from Government’s Growth Mission Fund, work is underway on a new STEM learning centre of excellence at the site with construction to start in 2026. This will create routes into quality employment for local people in science, technology, engineering and maths, shaped in partnership with leading businesses and industry experts, driving regeneration and sectoral expertise.



“Not only are the medicines and medical technologies the sector develops transformational for health and resilience, they are also vital for growth and productivity, as the sector delivers high value jobs for the UK economy.”

The UK’s Modern Industrial Strategy

Tees Valley is perfectly positioned to support national ambitions to drive significant health improvements. The UK aims to become the leading life sciences economy in Europe, meaning the development of a thriving life sciences ecosystem which directly leads to enhanced healthcare outcomes. This requires greater commercialisation and adoption of life science discoveries.

Our regional assets and infrastructure offer businesses the ability to undertake the entire process lifecycle from invention, innovation, commercialisation and then onto manufacturing. These advantages explain why Tees Valley is a major location in the pharmaceutical industry, with a vibrant innovation hub and sector bioclusters – all the ingredients to be a world-class centre of excellence.

The Northern Bio-Accelerator Partnership (NBioP) – formed by CPI, FUJIFILM Biotechnologies and Teesside University – has created a bioprocessing, biomanufacturing and biopharmaceutical hub in the region. Together, the NBioP provides basic and applied bioprocessing research, through to biopharmaceutical scale-up and ultimately, the commercial manufacture of life-changing medicines.

Driving health innovation is a key pillar of a thriving life sciences ecosystem. This is being realised in regional projects, most notably the in-development Tees Valley Care and Health Innovation Zone which brings together the opportunity to deliver a nationally significant care and health cluster through brownfield land redevelopment and the potential to improve the lives of local people.

The Tees Valley Care and Health Innovation Zone will complement existing national health assets given its focus on the digitisation of healthcare, such as the Middlesbrough-based specialist James Cook University Hospital. The region was recently chosen to be the home for a new NHS 111 Contact Centre in response to growing demand for the service. Practice Plus Group – which runs a network of centres throughout England on behalf of the NHS – is behind the decision which was informed by its Chief Executive Officer’s knowledge of the area and local people who are suitable for high-quality roles.

TEES VALLEY CARE & HEALTH INNOVATION ZONE

Stockton-on-Tees sits at the centre of the region with incredible connectivity to the North East and beyond, contributing more than a third of the region’s economic output.

The town has innovated in the past and continues to innovate through its specialist business support, nurturing the growth of hundreds of firms. 5,600 businesses already call Stockton-on-Tees home, including Fujifilm Biotechnologies.

Looking to the future, we are progressing Tees Central, one of the UK’s largest brownfield regeneration sites in the country. Working with partners, we will redevelop the 70-hectare unused

Tees Marshalling Yards into a new community at the heart of the Tees Valley. This will include 3,000 homes and 1million sq ft of potential employment and commercial development, with a potential platform for significant investment in new clinical facilities.

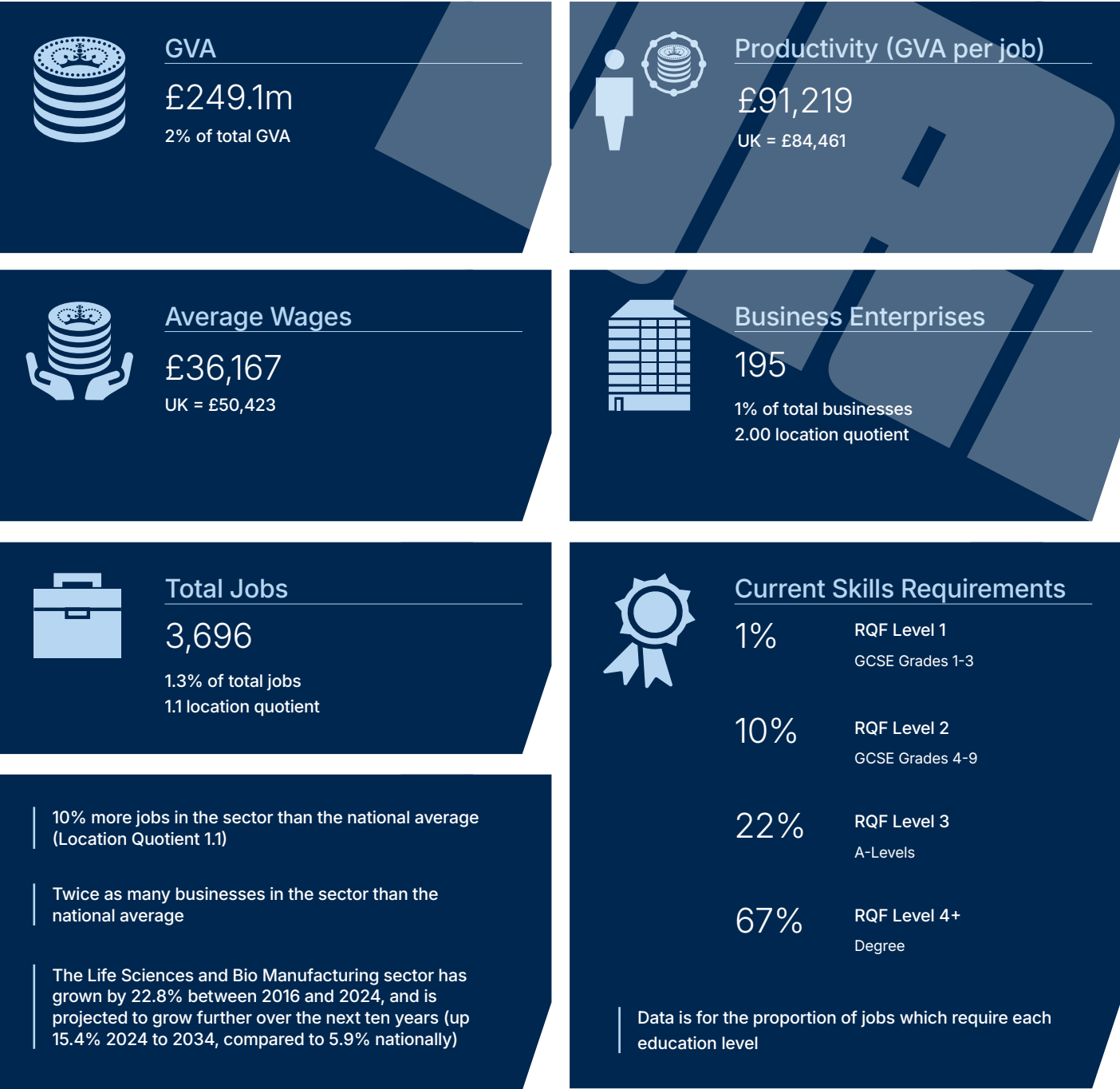
A major part of this is the nationally significant Care and Health Innovation Zone cluster, combining 110-hectares of land. This will provide health and care facilities to support the needs of local people and address health inequalities in Tees Valley, making it more important than ever that local people can access a modern and effective health and care sector.

The Tees Valley Care and Health Innovation Zone will deliver new infrastructure, an environment to nurture health and new housing to support the needs of people of different ages alongside. We are also working with partners to make the most of our assets and provide a new health and care educational anchor.





Key Metrics Life Sciences & Bio Manufacturing



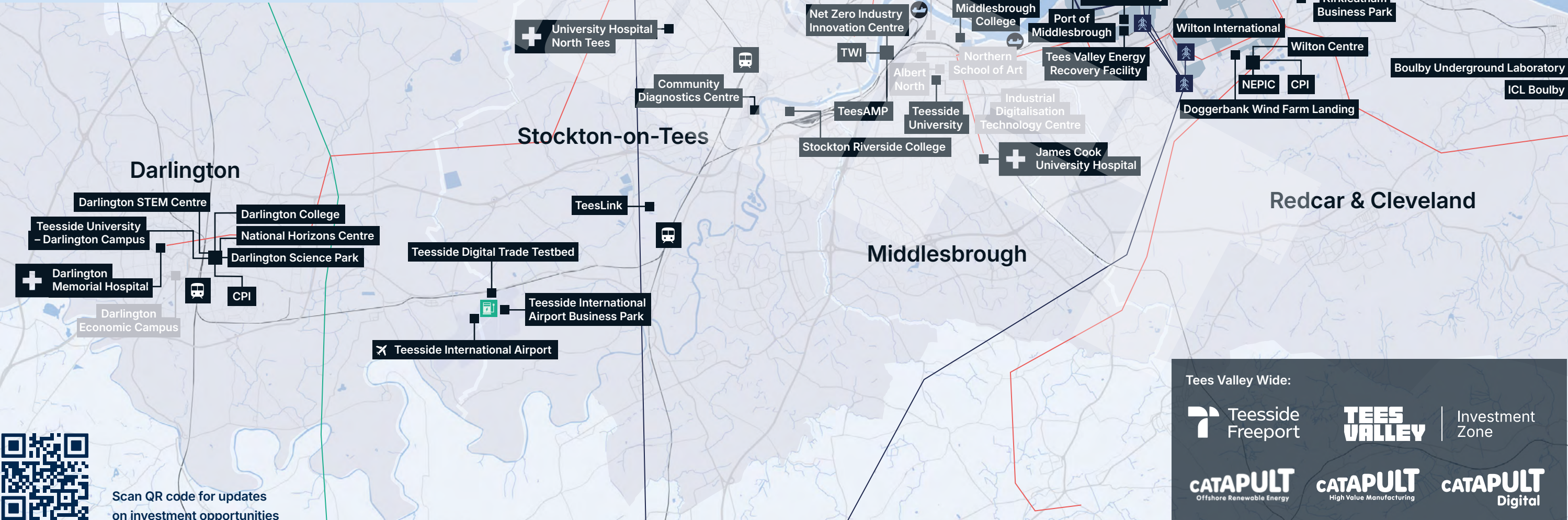
Source: Lightcast 2025.1, ONS

NATIONAL POSITIONING

Tees Valley Assets

Tees Valley forms a compact, well connected, functional economic geography with significant economic assets. This is coupled with supportive infrastructure which includes multiple deep-water sites, one of the UK’s busiest ports, access to utilities, including uninterrupted water and competitively priced low-carbon power.

The density and proximity of our assets in the Chemical and Process, Clean Energy and Life Sciences and Bio Manufacturing sectors – which collectively can be regarded as a Modern Industrial and Technology Cluster – and infrastructure provide unique opportunities for further business development and investment.



Scan QR code for updates on investment opportunities

Tees Valley Wide:

Teesside Freeport

ADVANCED MANUFACTURING

The UK's industrial strengths have developed because of a pioneering advanced manufacturing sector, which has arguably been its mainstay. This is as true nationally as it is regionally – Tees Valley is the birthplace of the modern railway, a pioneering transport solution which fostered the development of the area's chemical and steel industries, and transformed the world by sparking the Industrial Revolution.

"By 2035, the United Kingdom will be recognised as the best place in the world to start, grow, and invest in Advanced Manufacturing."

Sarah Jones MP, Minister of State for Industry
July 2024 to September 2025

Tees Valley is a global leader in advanced manufacturing and engineering and home to multinational businesses operating in manufacturing, engineering and process industries. These businesses – which include the likes of Nifco, Darchem Engineering, Paralloy & Firth Vickers and Wilton Engineering – play a critical role in the UK's international trading position, with goods exports accounting for more than three-quarters of the total goods exports in the region, compared to approximately half nationally.

Tees Valley's strong engineering base is supporting innovation in materials, transport, and energy in addition to our role in the UK's offshore wind supply chain. Our region's history of industrial scaling is enabling Tees Valley to solidify its reputation as the UK capital for creating low-carbon sustainable aviation fuel. Tees Valley is not only supporting the supply of new fuels such as hydrogen and sustainable aviation fuel but also growing the demand right here in the region. Teesside International Airport, for instance, was the UK's first pilot area to test hydrogen vehicles and is committed to being the UK's first net zero airport. This ambition will mean the airport will be a fully operationally net zero site by 2030 and provide passengers with zero emission flights by 2035, accelerating the move towards cleaner transport.

TEESLINK

Teeslink is a 55 acre industrial and logistics development situated in the heart of Tees Valley. Located within 1.5 miles of the A66, connecting the A1(M) and A19 trunk roads and directly adjacent to Eaglescliffe railway station, it benefits from multi-modal connectivity regionally, nationally and internationally.

The scheme offers a range of opportunities to occupiers, in a high quality business park setting. Situated in an established location for employment uses, nearby occupiers include Tata Global Beverages, Mersen (UK), Nifco Automotive Plastics and Marshall's PLC.



TEESAMP

TeesAMP was a £55million project led by Middlesbrough Council to transform a strategic development site to the south of the Riverside Park Industrial Estate. The project involved the remediation of contaminated land and the construction of a new advanced manufacturing space at the old Southwest Ironmasters foundry site.

Fostering growth in advanced manufacturing and research-led industries has been identified as a strategic priority, reflected in both the Middlesbrough Investment Prospectus (2017-2020) and the Council's Strategic Plan (2017-2021). These plans emphasise unlocking key

sites, such as TeesAMP, to stimulate business growth, attract investment, and increase the supply of high-quality employment land. The 11 hectare site, which opened in June 2020, became home to nine companies with 16,772 square metres of advanced manufacturing space created, alongside 523 jobs created.

TeesAMP offers some of the best accommodation in the Tees Valley, with 181,000 square feet of accommodation across 14 units of varying sizes. It has been built to a BREEAM 'Very Good' rating and an EPC rating of A.



NATIONAL POSITIONING

The ability to develop and commercialise transport decarbonisation solutions extend beyond aviation. Cummins – a world leader in decarbonisation solutions for commercial vehicles and offroad equipment – produces everything from advanced diesel, clean natural gas and hydrogen engines to battery electric powertrains. Caterpillar have two main sites based in Tees Valley. At their Stockton-on-Tees fabrication facility, they use the latest technology to cut, weld and machine all the major structures for the assembly of small construction machines. In Redcar & Cleveland, Caterpillar produces steel track shoes for use in hydraulic excavators, track type loaders and track type tractors in their 5,000 square metre facility.

Our region's businesses are also working closely with the Ministry of Defence on several contracts. Tees Valley is a part of the North East Regional Defence and Security Cluster, which enables innovation and collaboration to build a connected, forward-thinking defence community.

This is underpinned by infrastructure suited to support defence activity – for instance UK Docks Marine Services, a support contractor for the Ministry of Defence, has two dry docks and afloat facilities within the Tees Offshore Base and offices located in Middlesbrough. Teesside International Airport is also home to a fleet of Draken Europe's aircraft which provide training to our armed forces on how to respond to a range of threats.



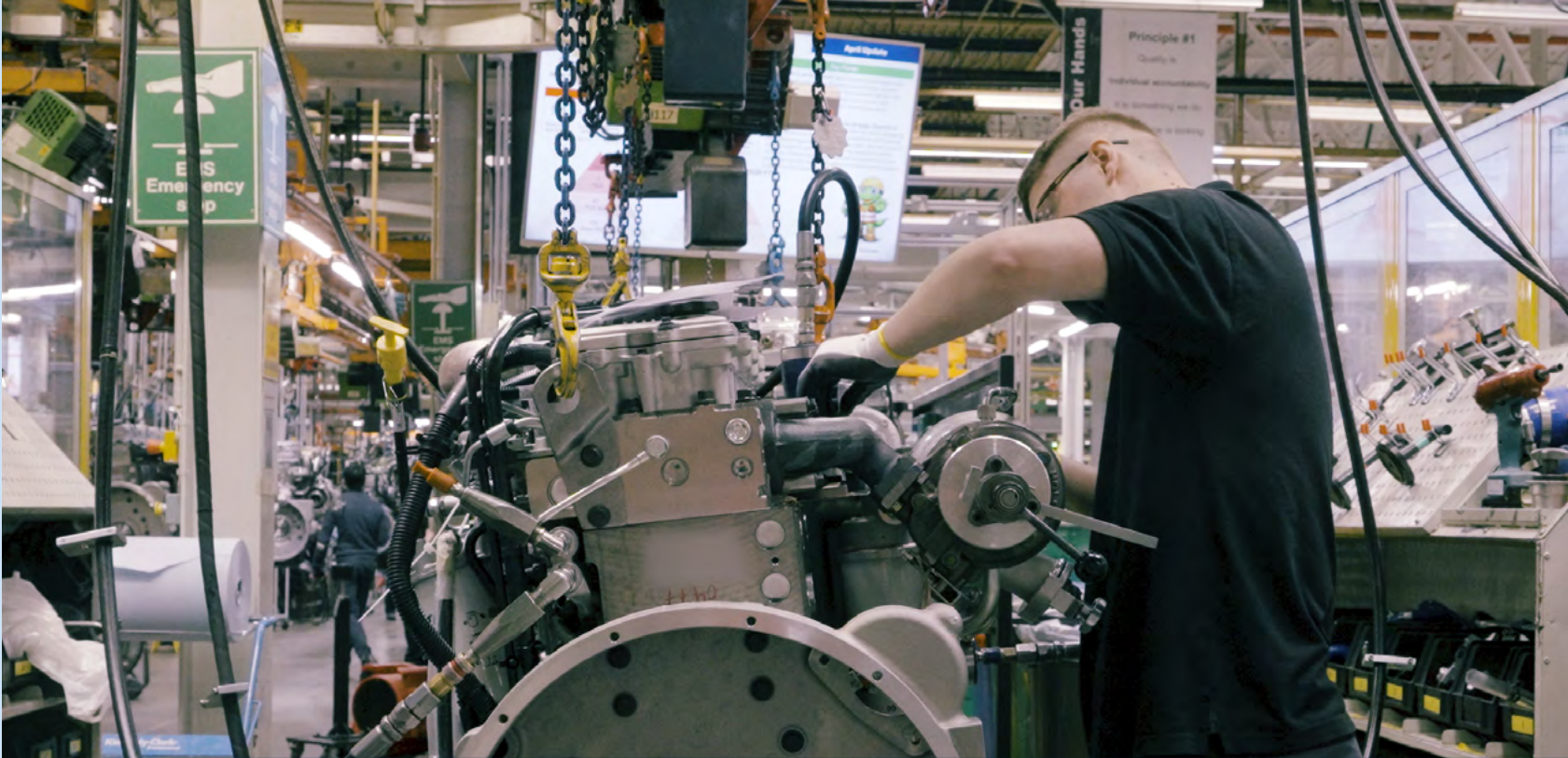
"We now need to industrialise innovative technologies into scaled products and services, working with international partners to secure global advantages in areas critical to economic development and defence."

Advanced Manufacturing Sector Plan

Our strong advanced manufacturing ecosystem provides the infrastructure, skills and expertise to support making the UK a defence industrial leader.

Space technologies are critical to national security, understanding our changing planet, further discovering the solar system and to our everyday lives. There is a notable opportunity to benefit from the growing demand of the global space economy and its associated space industry. Tees Valley has the capabilities and assets to meet this demand with the likes of Boulby Underground Laboratory which has been involved in testing the Rosalind Franklin Mars Rover.

Space North is a collaboration between partners across the North of England, representing our ability to advance space-related technologies and applications. As part of this, our region is well positioned to capitalise on demand and support national ambitions to cement the UK's position as a spacefaring nation.



CUMMINS

Cummins is a global power leader established in 1919. It has been manufacturing in Darlington since 1965 and is one of the region's largest private sector employers with around 1,500 staff at time of writing.

The site handles engine assembly, exhaust aftertreatment manufacturing, technical operations and business support, producing approximately 66,000 engines per year. It also houses a powertrain test facility, enabling the development and testing of vehicles and machinery powered by hydrogen, renewable natural gas, sustainable diesel and battery electricity technologies.

Project Brunel, based in Darlington, developed hydrogen internal combustion engine technology for commercial vehicles. Cummins led a consortium of tech companies – including Tees Valley-based Johnson Matthey – to successfully deliver a 6.7-litre hydrogen internal combustion engine for medium-duty trucks and buses. It delivers more than 99% reduction in tailpipe carbon emissions and further strengthens the Tees Valley Hydrogen Transport Hub, the first in the UK.

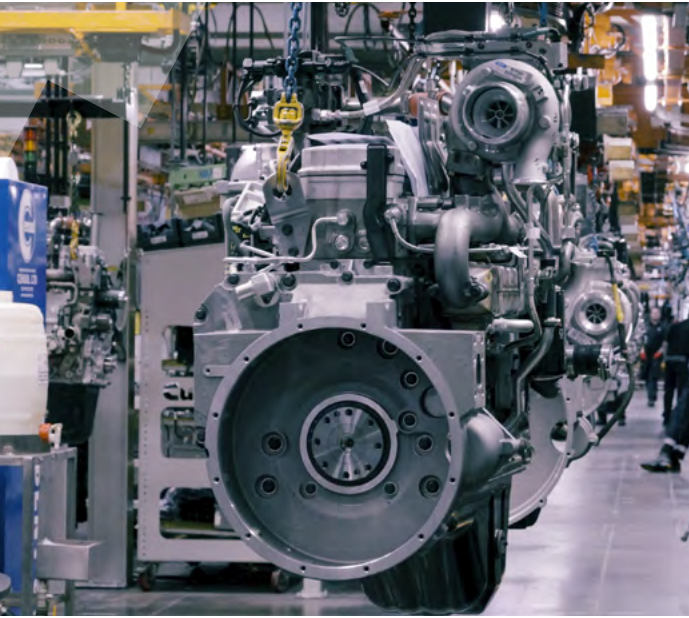
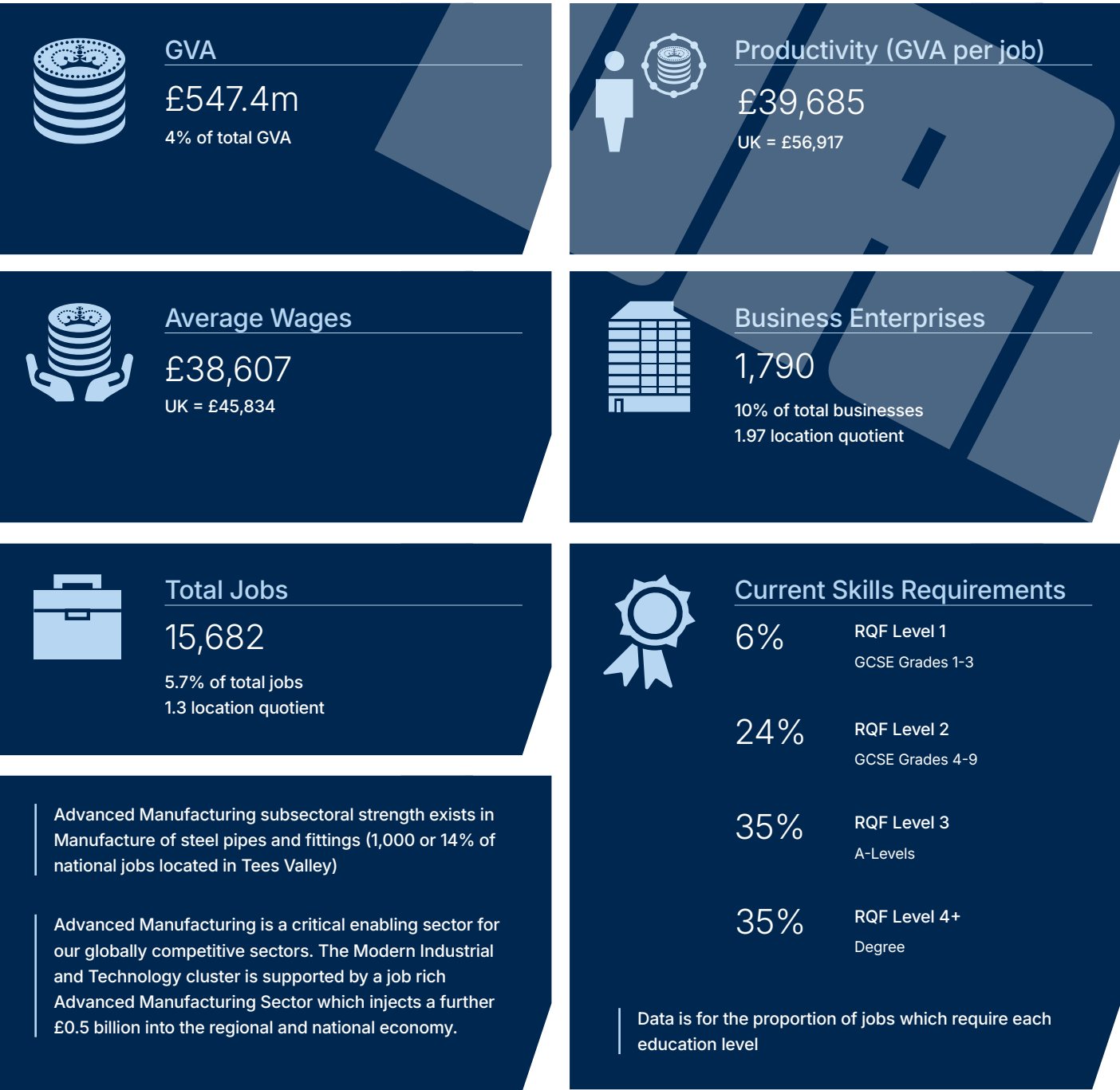


It's been supported by a £7.2million UK Government new technology funding award, through the Advanced Propulsion Centre, recognising the opportunity to put Tees Valley, and the UK, at the forefront of this key emerging technology.





Key Metrics Advanced Manufacturing



DIGITAL & CREATIVE

Tees Valley's future competitiveness will be shaped by its ability to combine digital capability, creative content and production, and industrial expertise. Digital innovation plays a central role in diversifying the economy and fostering cross-industry collaboration. It can enhance modern industrial practices including smart technologies helping us to play a role in delivering national initiatives to capitalise on technologies such as Artificial Intelligence.

Our region is ideally positioned to be at the forefront of industrial digitalisation, drawing on globally competitive industrial sectors and established digital capability. This is underpinned by nationally recognised strengths in digital technology, research and production, integrating digital technologies to deliver process and supply chain improvements. Additionally, our region's creative and cultural industries play a distinct economic role, generating intellectual property, shaping place identity, and contributing to a growing visitor and cultural economy supporting talent retention and attraction and improving quality of life.

Our digital sector is the fastest growing outside of London, with successful digital media, technology and creative businesses – Tees Valley is becoming a vibrant digital hub with a worldwide reputation for creativity, imagination and vision. This growth is the result of a strong existing ecosystem that provides the infrastructure, skills and specialisms to contribute to national growth through increased regional production, collaboration and intellectual property exports.

Together, these capabilities drive growth within the sectors and support innovation, productivity and new economic opportunities – particularly where digital technologies and creative content converge.



INDUSTRIAL DIGITALISATION TECHNOLOGY CENTRE

Teesside University's £1.8million Industrial Digitalisation Technology Centre (IDTC) supports SMEs in the Tees Valley to explore the opportunities that Industry 4.0 technologies bring, such as the Internet of Things (IoT), big data analytics, modelling, simulation and sensor technology – creating an essential competitive edge that generates real value for businesses.

Building on the University's reputation for innovation, academic excellence, world-class research and industrial experience, the IDTC



offers consultancy and mentoring for digitalisation projects that typically last from 6 - 12 months. The IDTC offers SMEs a practical opportunity to investigate the digital tools and services available to help a business plan its digitalisation journey.

NATIONAL POSITIONING

“The Creative Industries are an economic success story. They are a major UK employer, exporter and a pull for inward investment. They drive innovation and productivity, improve our living standards and drive growth in the wider economy.”

Creative Industries Sector Plan

The North of England has a long history of investing in the cultural and creative industries, with The Great North Creative and the North East Screen Industries Partnership – which is driven by Tees Valley Combined Authority – aiming to further realise the potential of the region and build upon our established regional assets in gaming, animation and immersive technologies and screen industries.

As part of The Great North Creative, Tees Valley is leading the Northern Music Export Office and working in partnership with West Yorkshire Combined Authority, North East Combined Authority and Liverpool City Region Combined Authority. Our region is key to realising national ambitions to make the UK the best place to make and invest in digital and creative content, services, products and skills. Our region is already the fastest-growing in terms of production spend nationally.



We are determined to build on this momentum and continue to back our artists, performers and makers, ultimately positioning Tees Valley as a leading location for cultural production and innovation.

In January, our region launched The Engine Room with support from the Government, Arts Council England and Middlesbrough-based Creative Factory to foster further creative production and export. The Engine Room is designed to transform cultural opportunities and deliver significant improvements to Tees Valley’s creative landscape by nurturing local talent and attracting new creators.

Initiatives like The Engine Room and Northern Music Export Office and programmes such as the Tees Valley Export Fund – funded by the UK Government through the UK Shared Prosperity Fund and delivered in partnership with the Department for Business and Trade– are raising Tees Valley’s national and international profile as a destination for culture and creativity.

The Export Fund has supported growing Tees Valley gaming firms to forge closer ties with global giants. Leaders from Tanglewood Games Ltd, Cardboard Sword Ltd, Observer Interactive, Radical Forge Ltd and Tees Valley accountancy firm Abacus Bean Ltd all attended the 2026 GDC Festival of Gaming in San Francisco with the help of the Fund. Among the key industry companies they met were Netflix, Microsoft, Mattel and Amazon Games.

The Northern Music Export Office has also backed the attendance of local musicians at global festivals like Texas’ South by Southwest. Most recently, Hartlepool five-piece Marketplace and Middlesbrough solo pop artist Loren Heat joined “Northern Sound” – a showcase at UK House during the prestigious music, arts and film festival attended by more than 300,000 people.



NATIONAL POSITIONING

“The sector’s advances are revolutionising industries across the economy, redefining how we live and work and spurring intense global competition to capture the benefits.”
The UK’s Modern Industrial Strategy



DIGITAL

Our existing digital capability is already improving how businesses operate, enabling innovation and creating opportunities across all sectors. Combining this with our strong digital infrastructure – including near-universal superfast broadband and rapid rollout of 5G – we are building a Smart Region by applying data and advanced systems to improve how people, goods and services operate and move in Tees Valley.

Strong regional foundations have been laid by the likes of Teesside University – a pioneer in digital education and research and Europe’s first Adobe Creative Campus. Their Digital Life Building houses cutting-edge technologies, including advanced AI and robotics suites, Virtual Reality and Visual Effects laboratories, animation suites and motion capture studios. Elsewhere Middlesbrough’s Boho Zone provide an ideal base for globally recognised firms including Double Eleven, Behaviour North and Observer Interactive to develop their products – reinforcing our position as a centre for digital production and enterprise.

HARTLEPOOL PRODUCTION VILLAGE

Hartlepool is fast becoming one of the UK’s most compelling production investment opportunities in the screen and creative industries.

At its heart is Northern Studios – the first large-scale TV and film studio complex in the North East. And backed by £15million of Investment Zone funding and more than £18million of government backing, Hartlepool is delivering a flagship Production Village. This purpose-built cluster of studios, facilities and specialist supply chain space for visiting productions and permanent creative businesses will support a broader production economy – music, podcasting, games and digital content.

Through the North East Screen Industries Partnership, TVCA and the North East Mayoral Strategic Authority are co-investing with industry – including the North East Production Fund, which has leveraged more than £55million in production spend.

Production spend in the North East has increased by more than 130% between 2022 and 2024, making it one of the UK’s fastest-growing screen production regions. A long-term partnership with the BBC is driving commissioning, production activity and sustainable growth.

Hartlepool will act as both a cornerstone and a gateway: strengthening capacity in the North East and contributing to a wider shift in UK content creation.

CREATIVE

Tees Valley has a rapidly growing and distinctive creative industries base spanning gaming and animation, film and television production, music and performing arts, and design-led disciplines such as User Experience, digital content and visual communication.

An ecosystem of assets and institutions with increasing national relevance include the Boho Zone and Albert North – a strong centre for digital and creative businesses – while Hartlepool’s Northern Studios and Production Village are making our region a growing hub for screen production.

These are complemented by Teesside University’s internationally recognised digital and creative programmes and the Northern School of Art – a specialist, leading provider of further and higher education in art, design and creative practice. These sit alongside a rich cultural infrastructure including organisations and events such as the Middlesbrough Institute of Modern Art (MIMA), Stockton’s ARC theatre, Festival of Thrift, Stockton International Riverside Festival, The Auxiliary, Tees Valley Arts, Theatre Hullabaloo, Tees Valley Museums Group and Middlesbrough Town Hall.

These assets position Tees Valley as a growing contributor to the UK’s creative economy - strengthening national production capability across games, screen, music and digital content, and developing talent and intellectual property.

Tees Valley is leading the North in these sectors. Through initiatives such as The Great North Creative and the North East Screen Industries Partnership, our area is working with partners across the North to scale production activity and build capacity in key areas including gaming, animation, immersive technologies and screen industries. As part of this, Tees Valley Combined Authority leads the Northern Music Export Office, working with West Yorkshire Combined Authority, the North East Mayoral Strategic Authority and Liverpool City Region Combined

Authority to support international growth for artists and businesses.

This activity is translating into global reach. Programmes such as the Tees Valley Export Fund support local creative and digital firms to engage with global markets and major industry players, while initiatives such as The Engine Room, Sonic Futures, Tees Valley Creates: The Freelancer Network and Tees Valley Artist of the Year are strengthening our region’s ability to develop, attract and retain creative talent and production.

This does not just support our economy but also provides greater value to our region as a result of its contribution to tourism, health and wellbeing and social and educational outcomes.



“The Creative Industries are an economic success story. They are a major UK employer, exporter and a pull for inward investment. They drive innovation and productivity, improve our living standards and drive growth in the wider economy.”

Creative Industries Sector Plan

CONVERGENCE

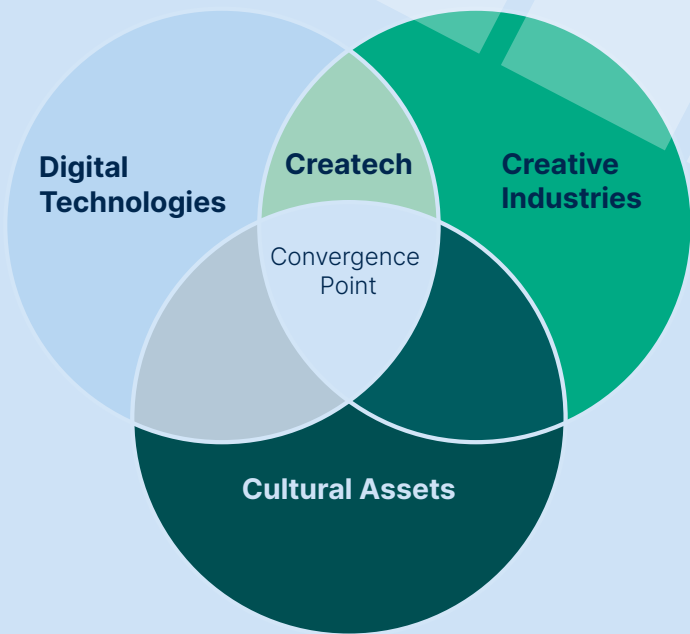
A distinctive opportunity lies in the convergence between Tees Valley’s digital and creative strengths - where technology and creative content combine to create new value.

This is not incidental. It reflects how these sectors increasingly operate, particularly in areas where technology and content are intrinsically linked. Our region has long nurtured this crossover and collaboration, with Teesside University’s Animex being a prime example. Founded in 2000, the festival delivers a world-class games and animation programme including global speakers from studios such as Disney, Pixar, Sony and Dreamworks. We are also home to New Horizons, a games industry-leading conference delivered by Game Republic, attracting global delegates and high-profile speakers. Tees Valley is increasingly the destination of choice for digital and creative events, festivals and conferences, and we are proud to be growing our own.

Tees Valley is well positioned to develop this opportunity and our £160m government-backed Investment Zone – currently the only one in the UK focused on digital and creative sectors – is designed to accelerate this convergence and enable new approaches across the wider economy. Our strengths in digital infrastructure, industrial application and data-driven systems combine with growing capability in creative production and cultural content. Teesside University’s academic and research expertise, specialist facilities, and established industry clusters, alongside increasing international connections and export activity enhance these. Tees Valley is becoming a centre for creative technology and digital production – a place where ideas can be developed, tested and scaled.

Digital and creative capabilities support growth well beyond their core sectors. Digital technologies are transforming manufacturing, energy, health and trade, while creative capability is strengthening how our places are experienced, how products and services are designed, and how organisations engage with people and markets.

Combining technical capability with creative thinking and industrial scale improves productivity, supports innovation and strengthens competitiveness across our key sectors. We are increasingly playing a distinct role within the UK economy – one that links advanced industry with digital creativity and translates innovation into real-world impact. We are not simply developing our digital and creative sectors, we are building a connected ecosystem of technology, content and capability underpinning the wider economy.



TEES VALLEY INVESTMENT ZONE

Tees Valley Investment Zone is a £160million government-backed programme – one of only 12 – and uniquely focused on digital and creative sectors to accelerate growth and position us as a centre of excellence for digital and creative innovation, technologies and production.

It is anchored in Hartlepool and Middlesbrough but designed to benefit the entire region through business growth, skills development, research and innovation, and supply-chain expansion.

Our Investment Zone combines targeted investment and support to strengthen local capability and competitiveness, letting us play a larger role in national and global markets.

Our region is accelerating growth by:

- Developing high-quality business and innovation space to support densification and scale
- Supporting creative production and screen industries, including the expansion of the Northern Studios and the Production Village
- Investing in research, skills and business growth to build a strong and sustainable talent pipeline
- Strengthening digital and creative capability across key locations and supply chains

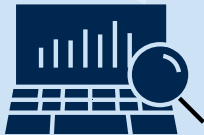
This coordinated approach is expected to:

- Expand the regional business base and support scale-up activity
- Create high-value jobs and attract private sector investment
- Increase exports of digital services and creative content
- Strengthen Tees Valley's role within national strategies and international markets

The Investment Zone supports regional transformation and wider economic objectives, positioning Tees Valley not only as a place of growing capability, but as a key contributor to the UK’s Modern Industrial Strategy and a globally connected centre for innovation, production and creative talent.



Design UX/UI



E-Commerce



Music Production



Cybersecurity



Film & TV



Software Development



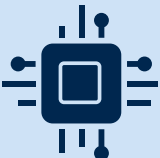
Gaming & Animation



Photography & Videography



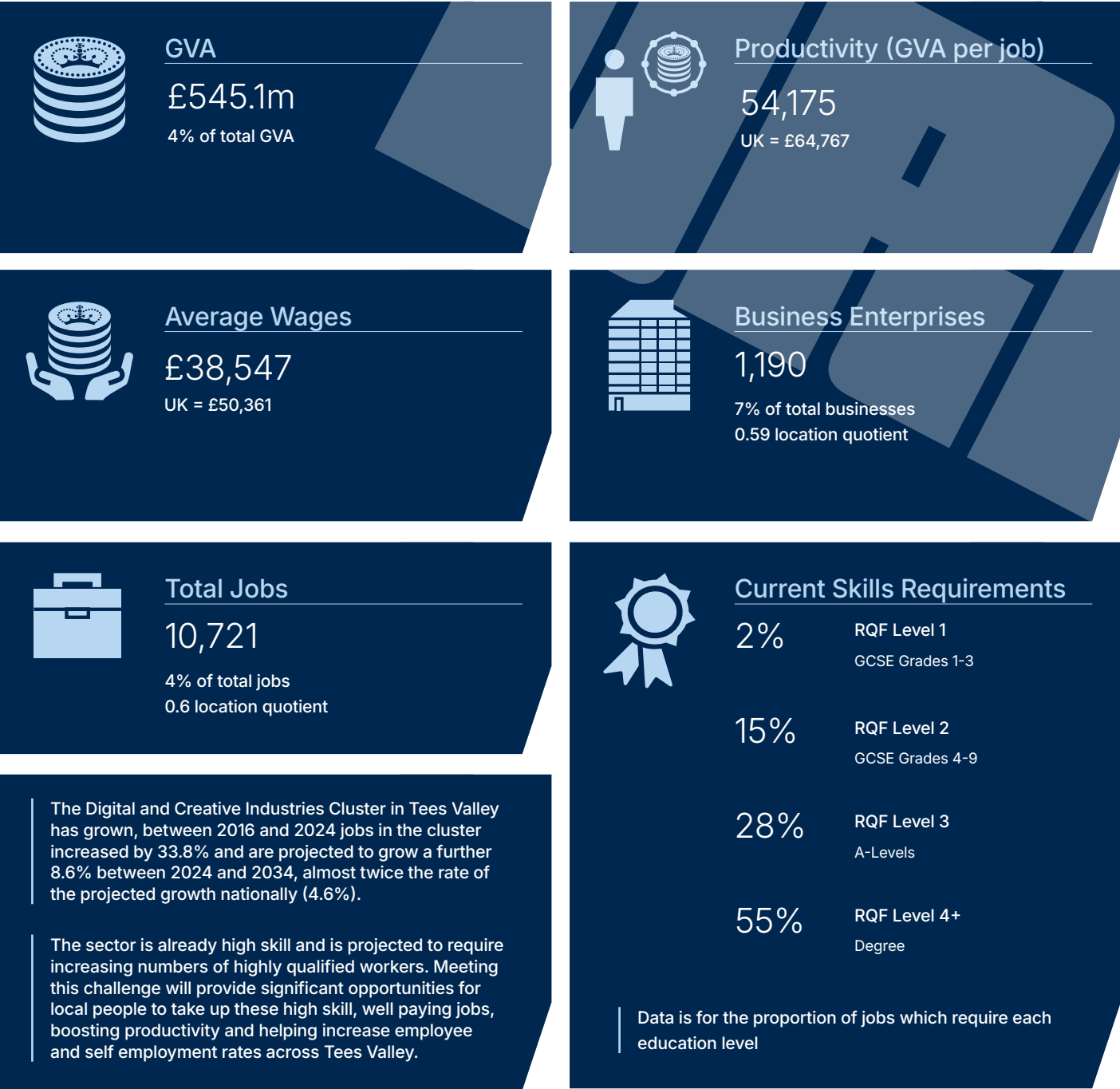
Performing & Visual Arts



Artificial Intelligence



Key Metrics Digital & Creative





DRIVE OPPORTUNITY

DRIVING OPPORTUNITY

To achieve our regional ambitions and support national intentions, it is critical that we enable our sectors with recognised strengths to grow, both in terms of the amount they export and the number of businesses located in our region. Connectivity and human capital are key factors of this, in addition to innovation and productivity. By supporting our sectors, we can drive opportunity and ultimately improve living standards through good, well-paying jobs and increased spending in our foundational economy, boosting our high streets and town centres.

“The cutting edge of the economy – defined as firms in innovation-led and knowledge-based sectors – drives productivity growth.”

Centre For Cities



713,000
people live in Tees Valley
(Source: ONS)



32,000
residents commute
to surrounding areas
for employment
(Source: Census 2021)



2.5 million
people living within
an hour's drive
(Source: Census 2021)



25,000
residents of surrounding
areas choosing to work
within Tees Valley
(Source: Census 2021)



Around 89%
(255,000 people)
of working residents live
and work in Tees Valley
(Source: Census 2021)



Gross Disposable
Household Income
Tees Valley £17,994
England £23,338
(Source: ONS)



Pay differential
Tradeable Sectors £40,543
Foundational Economy £27,994
(Source: Lightcast 2025.1)



CONNECTIVITY

To continue driving opportunity in Tees Valley, further investment in our transport and digital connectivity must be secured and effectively targeted; enabling businesses to start, grow and relocate in our region with ease and ensuring local people can access the opportunities these businesses bring through informed, holistic decisions on housing.

We must also ensure our existing connectivity strengths are resilient, enable economic benefits from clustering, promote healthier communities and ensure people can make the most of our regional offering.

Taken together, connectivity improvements will facilitate greater collaboration, competition and sharing of best practice throughout Tees Valley, while supporting well-connected, liveable places that reduce health inequalities and encourage tourism.



ACTIVE TRAVEL

From walking and cycling, to electric vehicles, bus, rail and road – we’re making it easier to get around Tees Valley and ensuring communities are connected. We are actively empowering residents to walk, wheel and cycle more every day to access opportunities and services, and ensuring visitors can enjoy and discover our region using sustainable transport modes.

Active travel options also offer major health and wellbeing benefits to residents. If more journeys are made by walking, wheeling and public transport then we will have less congested roads and improved air quality – meaning a better environment and healthier communities.

Key to this is making journeys as seamless and convenient as using private cars. We are actively improving the whole journey experience, including how each part connects and integrates with one another.

Continued significant investment is making this happen. Whether by improving existing travel modes through deploying technology, investing in low-carbon transport or planning more routes, we are improving transport across Tees Valley.

It is a team effort. Our region’s established and effective Enhanced Bus Partnership with bus operators is being put to good use as we enhance

connectivity, improve the passenger experience and electrify the bus fleet. The Walk Wheel Cycle Trust and Tees Valley Combined Authority are helping people to take more active journeys through Tees Valley Walking and Cycling Hubs.



Scan QR code to find out more



Tees Valley Growth Corridors

Indicative growth corridors showing the areas where we have a high concentration of businesses and existing links to assets and employment centres. These can be used to target and maximise investment to increase job creation and trade, ultimately maximising returns.

Key

Chemical & Process Growth Corrdior

Clean Energy Growth Corrdior

Life Sciences Growth Corrdior

Advanced Manufacturing Growth Corrdior

Digital & Creative Growth Corrdior

© Google Maps

← Links to
Barnard Castle

↙ Links to Liverpool
& West Yorkshire

↑ Links to North East

↑ Links to Sunderland

↖ Links to Newton Aycliffe

↓ Links to York



Scan QR code to view
our interactive map

TRANSPORT

“In order to ensure that everyone in Tees Valley is able to study, work, enjoy and fully participate in our ambitious plans for the future, we need a world-class transport system. Delivering a network that is fit for the future is a critical enabler for the success of the area.”

Tees Valley Strategic Transport Plan

Tees Valley is already Britain's best-connected region when it comes to trade and there are major ongoing or planned infrastructure improvements across our transport network.

Our region has some of the least congested roads in the country – even though 78% of local people travel by car or van as their preferred mode of transport – with our urban centres being connected by a dual carriageway, with the A1(M), A66 and A19 providing easy access to the whole of the UK.

The road network is complemented by the River Tees and Tees Maritime Cluster, which remain the backbone of our industrial economy and supply chains, with significant potential to build on our existing deep water port capacity. International airports are within reach by road and rail, with Teesside International Airport offering unique airside access to the region's integrated industrial economy.

Darlington Station, on the East Coast Main Line, was redeveloped in 2026 to improve local, regional and national reliability and free up further capacity on the strategic rail network. It connects London to Edinburgh in just over 4 hours, and direct trains to London are also accessible from Eaglescliffe, Hartlepool and Middlesbrough. Nonetheless, further investment in our transport system to improve capacity and connectivity is needed to enable more efficient movement of people, goods and ideas.



Unlocking strategic growth opportunities through significant investment in transport infrastructure



Working with partners to provide a sustainable transport network that is integrated, easy-to-use and feels safe and secure



Taking a digital-first approach to improve the journey experience for all of our users

Our **Tees Valley Strategic Transport Plan** sets out our ambitions to provide a high quality, quick, affordable, reliable, low carbon and safe transport network for people and freight to move within, to and from Tees Valley. By continuing to implement our plan, we will deliver an integrated transport system which enables the full potential of our region to be unlocked, ensuring Tees Valley remains a place known for export and trade and supports our region to be an emerging tourism destination.

An important part of achieving our transport ambitions by road, rail, sea and air relies on future proofing our transport network and international gateways, capitalising on the benefits of digital and innovative technologies.



DIGITAL

The **Tees Valley Digital Strategy** details how we intend to utilise digital infrastructure, digital innovation and digital inclusion to create a world-leading digitally enabled economy that works for every person and every business, retaining and attracting talent and ultimately making Tees Valley a great place to live, study, work, invest and visit.

This will enable Tees Valley to be the UK's first truly Smart Region by 2032 – using world-leading digital infrastructure and innovation to create opportunities for all local people and businesses. Our commitment to digital inclusion aims to ensure the benefits of the internet and digital technologies are accessible to all, by fostering a connected region where individuals have the skills and confidence to engage with education, employment and services, regardless of location.

Our region is off to a positive start with data showing Tees Valley has nearly 99% superfast broadband coverage in addition to nearly 95% gigabit capable and more than 70% full fibre – all above national averages. 5G is also being rolled out at pace.

This digital connectivity is enabling our region to trial innovative transport solutions that improve the movement of people, goods and services. These include a UK-first Digital Twin (a region-wide, automated, real-time, AI-driven traffic management model) and a UK-first Digital Trade Testbed. As part of this, vehicles are being trialled to support the UK's first commercial deployment of autonomous transport, facilitating the movement of both passengers and luggage at Teesside International Airport. Further deployments will see autonomous passenger vehicles improving connectivity and autonomous freight movements, improving efficiency, addressing driver shortages, and increased demand.

Initiatives like these are better connecting our communities and making it easier for businesses in our region to trade internationally. We nonetheless remain focused on improving digital coverage and access across our region, ensuring adequate capacity and resilience.



SMART INFRASTRUCTURE

To better understand mobile signal strength and network performance across Tees Valley, Inakalum was commissioned to assess coverage and capacity for the UK's major mobile operators.

Surveys were conducted at street level using NetworkUX kits installed in waste collection vehicles, enabling continuous monitoring of network performance as the vehicles travelled their usual routes.

More than 12 million data points were collected and integrated into a public coverage checker. This enables local people and businesses to review mobile signal strength and capacity, identify coverage gaps, and make more informed decisions about their network providers. The data also provides valuable evidence to support engagement with mobile network operators, helping to drive targeted investment into areas where connectivity improvements are most needed.



Scan here to visit Tees Valley Mobile Coverage Checker

Digital connectivity is a crucial component of our digital inclusion ambition by ensuring people stay connected, as well as supporting the operational deployment of smart transport infrastructure.

Tees Valley is emerging as a UK leader in AI-enabled transport infrastructure and real-time digital systems, demonstrating how advanced technology can improve connectivity, productivity and regional resilience, supporting our ambition to be the UK's first truly Smart Region by 2032.

The region has delivered one of the UK's most advanced Intelligent Transport Systems programmes, integrating real-time data, predictive analytics and connected infrastructure across the transport network. This is helping create a more responsive, resilient and reliable network to move people and goods, bolstering future inward investment opportunities.

A key element of this programme is the UK's first operational region-wide transport Digital Twin, regarded as a national exemplar. It is enabling predictive and data-led management of the transport network in real time which is leading to measurable improvements. Tees Valley has also deployed advanced adaptive traffic management technology across the highway network to improve reliability, reduce congestion and support more efficient movement.

This shows how Tees Valley is moving beyond digital ambition to operational delivery, helping establish the region as a nationally significant location for smart infrastructure, applied AI, integrated digital systems and future-ready public infrastructure capable of supporting long-term economic growth and investment.

HOUSING

Regional transport and digital infrastructure investments relate to, and are influenced by, the locations of our communities. This is essential in our region as more than one in four households do not have access to a car or van and 12% of households in the North East are affected by transport poverty.

Despite this, 98.0% of working-age residents live within an hour of a Further Education establishment, and all people in Tees Valley live within 50 minutes of an employment centre by public transport.

Importantly, it is not just about where houses are situated but also the supply, type and construction – homes must be affordable, connected, close to job opportunities, low carbon and built by a local workforce to a good quality, with construction supporting regional supply chains.

Tees Valley is already one of the most affordable places to live in the country and we have strong projected growth in our construction sector, which already employs more than 18,000 people.



© Esh Construction and Chapman Brown Photography

UNION VILLAGE

Middlesbrough town centre's Union Village is an intervention at a site of significant housing need.

The scheme has regenerated a 3.5-hectare brownfield site in Gresham, one of England's most deprived neighbourhoods, providing a mixed portfolio of 145 new homes all for affordable rent. The site had sat vacant for years after previous regeneration attempts had stalled.

Delivered by Middlesbrough Council and Thirteen Group in partnership with Esh Construction, with grant support from Homes England's Affordable Homes Programme, it offers five secure communal garden areas providing safe havens in which children play and residents gather. Residents have already formed community groups, established allotments and are hosting events, helping foster ownership and stewardship of these shared spaces.

Union Village has secured a number of awards, including Regeneration Project of the Year at the

Northern Housing Awards, Residential Project of the Year at the Constructing Excellence North East Awards, and the LABC Warranty Bricks Site Recognition Award for consistent high-quality workmanship. It was also selected as a recognised scheme for the Housing Design Awards and shortlisted in the Excellence in Planning for Homes and Communities in the RTPI North East Awards.

This project was supported by £2.4million of Brownfield Housing Funding providing further flexibility to deliver on our key priorities, creating strategic housing alongside key assets in employment, training and education.



The **Tees Valley Spatial Development Strategy** is currently in development and will consider housing need, strategic infrastructure provision, improving the environment and ensuring climate resilience.

It will set the framework for future Local Plans in Darlington, Stockton-on-Tees, Middlesbrough, Hartlepool and Redcar & Cleveland and Stockton-on-Tees. This is particularly important in Tees Valley as we have no defined city centre and need to favour decisions which increase the density and co-location of business activity and opportunities with communities of high-skilled workers. Our region also works collaboratively through our **Strategic Place Partnership** with Homes England.



© Chapman Brown Photography

TALENT

Tees Valley has, and continues to, invest heavily in our residents. We are committed to delivering a world-class health, education and skills ecosystem which provides a readily available, experienced and skilled labour pool for existing and future businesses, while ensuring that the opportunities that they bring can be accessed by local people – giving residents the skills to be career ready, access well-paid roles and progress as well as the skills they need to go about their day-to-day lives.

To do this, we work closely with our businesses to identify their current and future workforce needs, cooperate with education establishments at all levels – supporting education from primary to Further and Higher Education – health providers and engage our communities with support from partners such as the voluntary, community and social enterprise sector.

This joint working is paying off as today seven in ten working age adults are currently employed across our region. However, we know that there is still work to be done to make Tees Valley a region where everyone can thrive by raising educational success, ambition and awareness of opportunities, ultimately achieving full employment in a well-paid job for anyone who wants one.

“Human capital – the capabilities and skills of individuals and populations – is a key driver of economic prosperity and productivity. It can be developed by ensuring individuals are able to sustain good health, and they are in possession of in-demand skills and capabilities. The value of human capital is realized in the labour market through productive employment, and it is developed through education during the first two decades of an individual’s life as well as through mid-career training investments.”

World Economic Forum

“Boosting employment in sectors which can contribute to aggregate productivity and generate economic growth are key, and a rebalancing of sectoral employment towards high productivity sectors will close both Tees Valley’s productivity gap and output gap.”

Innovate UK Tees Valley Local Action Plan

The **Get Tees Valley Working Plan** is our main health, skills and work plan to realise our aims and maximise the opportunity of our human capital for the benefit of our businesses and communities.

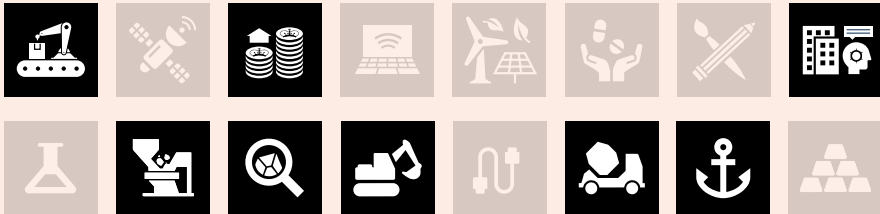
The plan – which sits alongside other regional skills, workforce and health plans and interventions – looks to increase employment, mitigate health-related barriers to work and improve job quality. It details how as a region we are collectively working to address challenges to labour force participation and progression, including through initiatives like the Tees Valley Youth Guarantee Trailblazer and Connect to Work programmes.

Taken collectively, we will continue helping people to stay local and go far with their careers regardless of their backgrounds, focusing on upskilling and retaining to facilitate progression into higher value, higher paid jobs. This, in turn, will help to stimulate the local labour market, allowing those already in work to progress, and provide new opportunities for those entering the labour market for the first time or returning after a pause.

86% of jobs are in our foundational economy, which underpins our existing and emerging regional sectoral strengths. The foundational economy in Tees Valley includes professional and business services, construction, health and social care and our visitor economy – crucial components if we are to grow the economy and contribute to national ambitions.

It is important that we continue the work that is already underway, which is succeeding to increase business density and diversify our regional economy with an eye to securing greater opportunities for local people and allowing progression into well paid, productive jobs.





Key Metrics Foundational Economy



GVA

£9,263
75% of total GVA



Productivity (GVA per job)

£40,339
UK = £48,996



Average Wages

£27,994
UK = £34,238



Business Enterprises

13,935
80% of total businesses
0.98 location quotient



Total Jobs

234,936
86% of total jobs
1.0 location quotient



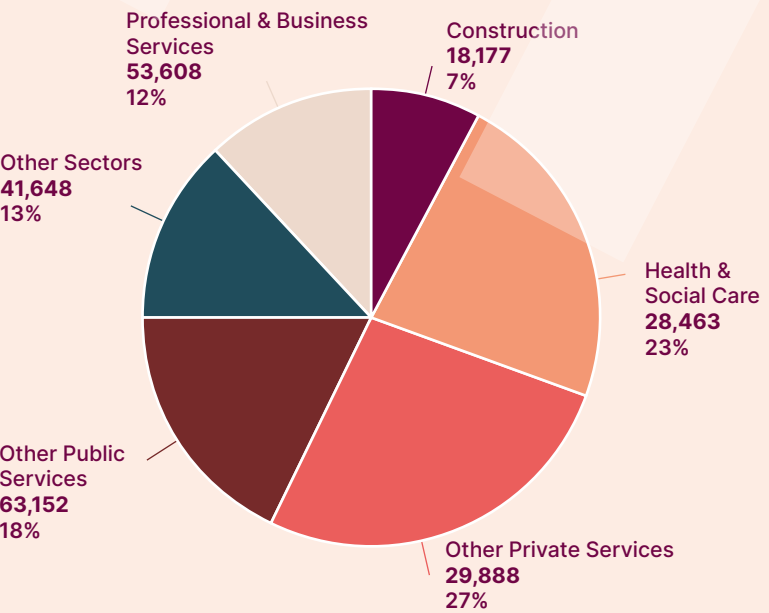
Current Skills Requirements

7%	RQF Level 1 GCSE Grades 1-3
44%	RQF Level 2 GCSE Grades 4-9
19%	RQF Level 3 A-Levels
29%	RQF Level 4+ Degree

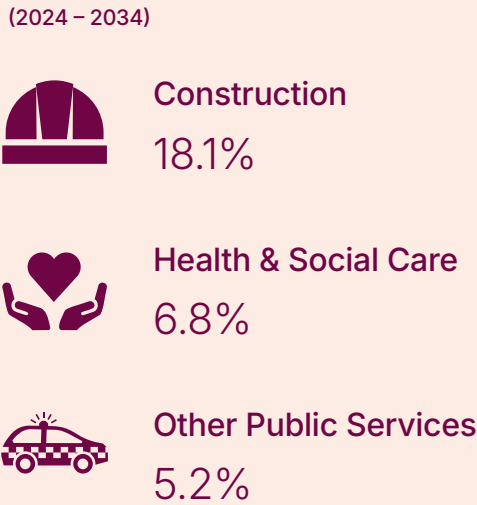
Data is for the proportion of jobs which require each education level



Foundational Economy Jobs 2024



High Growth Sectors





DARLINGTON ECONOMIC CAMPUS

Darlington Economic Campus (DEC) has built on the long-established Department for Education location in the town, as part of the Government's strategic decision to relocate Civil Service jobs outside of London as part of its Places for Growth Programme.

This created a multi-departmental government hub with more than 1,000 civil servants now situated there, with around 20% relocated and 80% newly recruited locally. Additional jobs have also been created in support services and supply chains to government departments. A permanent building for the hub will accommodate more than 1,600 civil servants.

Government staff have worked from the town's Grade A Feethams House office accommodation, repurposed after being established to provide quality office space for SMEs in the borough, as well as general business use.

The DEC has provided a threefold advantage for Tees Valley. It has provided both direct and indirect jobs for local people while anecdotally contributing to increased footfall in Darlington Town Centre. Furthermore, it is now ensuring that the voice of the region, its local people and businesses are heard – putting Tees Valley at the forefront of government policy and decision-making thanks to a deeper understanding of our challenges and opportunities through lived experience.

- 
HM Treasury
- 
Department for Business & Trade
- 
Department for Education
- 
Department for Energy Security & Net Zero
- 
Department for Science, Innovation & Technology
- 
Department for Culture, Media & Sport

- 
Ministry of Housing, Communities & Local Government
- 
CMA
Competition & Markets Authority
- 
Office for National Statistics

INNOVATION

“Innovation involves taking cutting-edge ideas to market, doing things differently and embracing diverse thinking. Innovation is about addressing real-world challenges using the power of people who can create and deliver transformative solutions.”

Innovate UK Tees Valley Action Plan

Innovation in Tees Valley has already made its mark across the world. The strength of our skills base, coupled with a spirit of inventiveness and world-leading research institutions and assets, has long given us an outstanding reputation for industrial excellence.

Tees Valley has the highest percentage of turnover related to businesses introducing new products to the market. The region is also above the English average for the percentage of businesses who are product innovators and businesses who are business process innovators. It is no surprise, therefore, why Tees Valley attracts noticeable levels of Innovate UK funding.



Turnover from
Introducing New Products
Tees Valley (31.1%) | UK (18.7%)
(% of turnover)



Product Innovators
Tees Valley (22.6%) | UK (20%)
(% of businesses)



Business Process
Innovators
Tees Valley (30%) | UK (29.6%)
(% of businesses):



Innovation Active
Tees Valley (35.4%) | UK (37.1%)
(% of businesses)



Performing Internal R&D
Tees Valley (12.5%) | UK (14.2%)
(% of businesses)

BOULBY UNDERGROUND LABORATORY

The laboratory is housed 1.1km below ground in the deepest mine in Great Britain, supporting multidisciplinary studies which require access to low background experimental space or access to geologically interesting deep underground environments. The work being done at Boulby focuses on quantum technologies and particle physics, with the site offering one of a few facilities in the world where such studies can take place – it is the only one of its kind in the UK.

The science support facilities at Boulby currently include a 4,000m³ deep underground laboratory for ultra-low background projects, with fully supported experimental areas operated at 10k and 1k clean room standards (ISO 7 and 6

respectively). With a footprint of 1,600m², the laboratory has power, internet, 5T and 10T lifting capacity and air conditioning and filtration. In addition, Boulby also operates a 3,000m³ Outside Experimental Area in a nearby bare salt cavern for studies requiring supported access to the deep underground environment and geology.

The scientists at Boulby intend to expand the facilities over the next decade, building on their initial work in the 1990s in the search for Dark Matter. Recent studies have included equipment testing on the Rosalind Franklin Rover which is destined for Mars, with a planned launch date in 2028.



Science and
Technology
Facilities Council

Boulby Underground
Laboratory



DRIVING OPPORTUNITY

Historically, innovation in our region has largely focused on demonstration, pilot production and scale-up activity, readying products to move towards commercialisation – reflecting our heritage of manufacturing excellence and unique international pilot capabilities. There remains significant innovation potential (in terms of speed, type and scale) in our traditional tradeable sectors as well as noticeable opportunities in our emerging tradable sectors.

There is a clear opportunity for Tees Valley to adopt a more agile and coordinated approach to targeting and landing commercialisation opportunities – better connecting local firms with the existing innovation ecosystem to drive up research and development intensity throughout our business base, helping firms grow or move up the value chain.

This activity must also be supported through a whole-system approach through greater innovation funding, for example, if we are to fully embed innovation across Tees Valley. This includes making the most of our innovative institutions to foster more start-ups and spin-outs.

Tees Valley's Innovative Institutions



AMAZON DRONES

Innovation is still plain to see in companies that base themselves in Tees Valley today. International e-commerce company Amazon has successfully started drone flights out of its Darlington fulfilment centre, ahead of the town becoming the first location to launch its drone delivery service, Prime Air, in 2026.

The service will use Amazon's autonomous MK30 drone to deliver packages weighing up to 5lb to customers in less than two hours.

Teesside International Airport has played a vital role in supporting the roll out of the drone service through advice and guidance on local air operations from senior management and the air traffic control team, while liaising with the Civil Aviation Authority.



While the potential is there, we know that there are several factors which make it challenging to commercialise innovation opportunities and, ultimately, encourage greater levels of innovation within the business base.

The **Tees Valley Innovate UK Action Plan** details how our region intends to capitalise on our existing strengths, innovation clusters and support our innovation-enabling ecosystem, ultimately positioning Tees Valley as a national centre for excellence in innovation. This will be achieved by collectively working with UKRI and particularly Innovate UK to:



Inspire – Inspiring more businesses to undertake all forms of innovation and to generate commercially viable intellectual property.



Involve – Working together across the Tees Valley ecosystem to have a greater impact than we can separately.



Invest – Aligning our existing resources and investments to ensure that we build on the insights, assets, and capabilities from across Tees Valley.

Through continuing to create the necessary conditions and further investing in impactful ideas – that are not limited to only technological or research-driven innovation – we will increase innovation in our region for the benefit of our businesses, communities and economy, ultimately putting more money in people's pockets.

“Innovation affects productivity by making products better, processes more efficient, and businesses more effective. It enables individuals, businesses, and economies to produce more output with the same – or even fewer – resources, allowing economies to grow.”

What Works Centre for Local Economic Growth

PRODUCTIVITY

In addition to continuing our efforts to ensure local people have the skills to access opportunities and support the ambitions of our businesses, we must also remain focused on encouraging businesses and entrepreneurs to increase productivity – supporting them to be as competitive and profitable as possible through increased returns on investment, creating further opportunities and ultimately boost living standards.

“Increased productivity can lead to higher wages and household incomes, stronger businesses, better public services and a higher standard of living.”
The Productivity Institute

Tees Valley is already home to several sectors – Chemical and Process; Clean Energy; and Life Sciences and Biomanufacturing – that have productivity rates above national averages. It is important we continue to support productivity advancements in these sectors, enabling and encouraging them to increase outputs through activities like the deployment of technology and adoption of innovative practices. Increasing exports and access to foreign markets will also foster further innovation and in turn productivity.



MADE SMARTER

Made Smarter North East has supported small and medium-sized manufactures to grow through the adoption of innovative practices and new technologies. The programme provides firms with a structured journey to digital adoption, including a string of workshops to explore digital technologies, tailored support from sector experts and networking opportunities with other regional manufacturers.

Those taking part gain valuable insight into how digital adoption can unlock growth, efficiency and long-term resilience through improved productivity.

Middlesbrough-based Virasel Valve Solutions Ltd are a prime example as recipients of the programme. The business specialises in valve repair, servicing, and overhaul and needed to work smarter and quicker to keep pace with a growing order book. Through the programme, Virasel Valve Solutions Ltd purchased a digital

control valve test bench with their capital grant and also brought in an expert consultant on engineering reporting. This saved the firm time on their existing processes and enabled them to get up to speed with the new technology quickly.

The programme means businesses across Tees Valley, like Virasel Valve Solutions Ltd, can improve their productivity and compete on a national and global stage, ensuring that supply chain opportunities are not lost to overseas businesses.



Scan QR code to find out more

MADE SMARTER



DRIVING OPPORTUNITY

If Tees Valley can match national productivity rates, we can increase the value of our region's economy by £9billion (GDP per capita).

Productivity is not only important for the sectors that export but also in those that currently do not. We must encourage productivity improvements in our non-tradable sectors – the majority of which are located in our foundational economy – given the vital role they play in our regional economy.

This intention goes hand in hand with our skills and employment ambitions due to the initial displacement effects this can have in the short term and progression into higher-paid roles in the long term. However, on balance, productive non-tradable sectors are essential if we are to nurture productivity and offer the most efficient goods and services, ultimately leading to reduced costs and greater profits for our businesses.

Importantly, productivity improvements do not just come from highly innovate, export-focused firms and a diversified economy, crucial though they are. At its core, productivity touches on being as efficient as possible with the resources available to achieve an output.

If we are to be a region known for productivity, we must continue to focus our efforts on securing further devolution of powers and funding from central government. The Government has recognised the importance of giving those who know their areas best the powers and funding to achieve better outcomes through coordinated action, enabling more efficient use of resources. Tees Valley must continue to capitalise on this opportunity and strive to be an exemplary region known for purposeful delivery with and for our communities.



“Regions that leverage their tradable sectors tend to see faster productivity growth. Firms in tradable sectors are more exposed to international competition and therefore need to be dynamic and innovative, raising productivity through either cost savings or exploration of new market opportunities. A holistic strategy to raising productivity should also include measures to encourage a diverse economy, which is less vulnerable to shocks and can recover more quickly from downturns. This requires seeking opportunities to improve productivity in both tradable and non-tradable activities.”

OECD





STRENGTH IN FOUNDATIONS

To deliver the regional prosperity everyone wants to see, we know there are challenges that must be addressed to make sure our region has strong foundations to make the most of what we have to offer and capitalise on future opportunities.

Some of these challenges are barriers to growth which require targeted actions, others are underlying causes that will need broader reforms. Both require collaboration from organisations such as central, regional and local government, business, education providers and the voluntary, community and social enterprise sector.

It is our collective responsibility to do everything we can to ensure that, over the next decade, we see improvements that make Tees Valley known as a prosperous region with a **growing economy, thriving places, strong communities** and **remarkable businesses**.



GROWING ECONOMY

Tees Valley already contributes £18.9billion in Gross Domestic Product – the value of goods produced in one year – to the national economy. We are committed to increasing this figure alongside seeing improvements in other factors as a strong UK economy is built from a strong Tees Valley economy. This plan sets out how we intend to continue our journey to make our region the place of choice to live, study, work, invest and visit – a journey that will be guided by five commitments and fuelled by a sustainable growing regional economy.



Increased GDP



Increased Investment



Increased GVA



Further Devolution



Increased Consumer Spending



Reduced Welfare Bill



OUR COMMITMENTS:

Our Tees Valley – a place where...

- **Everyone shares in opportunity:**
Growth creates real opportunity for people, where good jobs and incomes and a strong local economy improve everyday lives in every community.
- **People are proud to live, work and belong:**
Vibrant places, quality homes and a healthy environment support fulfilling lives, and people feel connected, safe and proud of where they live.
- **People succeed and thrive:**
People of all ages build skills, access opportunity and achieve their potential – staying local to go far.
- **Our sectors power a sustainable future:**
Our industrial strengths drive innovation and productivity build resilience and secure long-term prosperity.
- **Businesses start, grow, invest and lead:**
Businesses of all sizes thrive – innovation is supported, investment is secured, and enterprise creates lasting opportunity for local people.

THRIVING PLACES

Tees Valley's five boroughs each have something unique to offer our people, businesses, investors and visitors, making our region much greater than the sum of its parts.

Significant and visible regeneration projects are breathing new life into our towns, unlocking a range of opportunities and creating new ones. This has been accompanied by considerable effort and investment to support regional ambitions, attract big businesses and investors right across Tees Valley and connect people to opportunity to make the most of what our region – and its multiple economic centres – has to offer.

Nonetheless, and despite its compact geography, Tees Valley continues to experience place-based challenges which lead to negative perceptions, make it harder to travel around the region for work and leisure, hold back business growth and discourage investment – but, importantly, many of these challenges are not unique to our region and must be addressed at a wider scale.

For instance, we know that energy costs and speed of connections restrict businesses' ambitions and competitiveness, and that some of our infrastructure hinders faster commutes and limits public transport options. Through working in lockstep with our place makers, we are committed to continue our collective efforts and increase momentum to create thriving places known for their liveability, offering and potential, by seeing particular progress on the following factors.



DEVELOPING DARLINGTON

Darlington is emerging as a key economic centre and one of the UK's fastest growing towns. It is home to regional assets such as the Science Central innovation quarter and Darlington Economic Campus and its nine government departments and more than 1,000 civil service staff.

The town is entering a new chapter, bolstered by government investment and a new £140million railway station, which is driving demand for both homes and high-quality commercial space.

Darlington Borough Council is working with visionary UK developer Cityheart to deliver transformational town centre regeneration. Five strategic sites will include new Grade-A

office space opposite Government's expanding Economic Campus, home to a further 1,600 staff, complemented by opportunities for flexible workspace and innovation-led facilities supported by Science Central's firms, and the development of a new state-of-the-art STEM centre.

Construction is expected to begin in 2027, with further plans for up to 300 sustainable homes, transport infrastructure, greenspace and public realm development in the town centre.



THRIVING PLACES



Improve transport connectivity



Increase active travel and public transport patronage



Increase visitor numbers (day + night)



Increase visitor spending



Improve digital connectivity



Improve energy connectivity



Fostering regeneration



Increase Foreign Direct Investment



Reduce energy costs



Improve infrastructure resilience



Increased student numbers



Improve rateable value of commercial floorspace



Healthy housing supply



Improve housing stock



Improve land values



Reduce vacancy rates



Increase supply of commercial space



Increase liveability



Increase natural capital



Improve perceptions

STRONG COMMUNITIES

Tees Valley is a region proud of its heritage, industrial history, and fantastic culture and lifestyle offer. Our communities are the advocates and ambassadors of our region and will continue to shape Tees Valley and determine our future.

There are few places that could rival the pride, spirit and hospitality which characterise our communities. Tees Valley is where the next generation of creators, makers and doers are defining tomorrow. However, there is still more to be done so those who call our region home – whether they live in our urban centres or rural and coastal areas – can go about their day-to-day lives, fulfil their true potential and improve their life outcomes.

We know there are large numbers of working-age people who do not have the required skills level, are unemployed or outside of the labour market.

Too many people still feel they must leave the area to access exceptional education or secure good-quality, well-paid jobs. We also recognise that many working households live in some of the poorest communities in the country as Tees Valley's average wages are relatively low.

These circumstances, more than most, must be improved because they interact with higher levels of material hardship and lower living standards. They mean our workforce is smaller than it should be and our residents have reduced chances to contribute to the society, workforce and economy.

There are several factors which contribute to these situations which we must address – with every step of the journey being informed by our communities and in their interests.



DEVICE DONATION

Furbd is a digital inclusion and sustainability non-profit organisation which believes that no one should feel left behind in a digital world. That is why they collect, refurbish and reuse donated technology, giving it new life and providing people with new possibilities. Furbd work with more than 140 trusted charities, community groups and support services who understand local needs.

Together, they make sure technology reaches individuals and families who are struggling without access. That might be someone applying for work, a young person trying to keep up with school, or someone simply trying to stay connected to loved ones. Every device they restore creates a new starting point for someone else. By reusing technology, partnering with trusted organisations and reinvesting 100 percent of their profits back into their mission, they are building something sustainable and rooted in community.



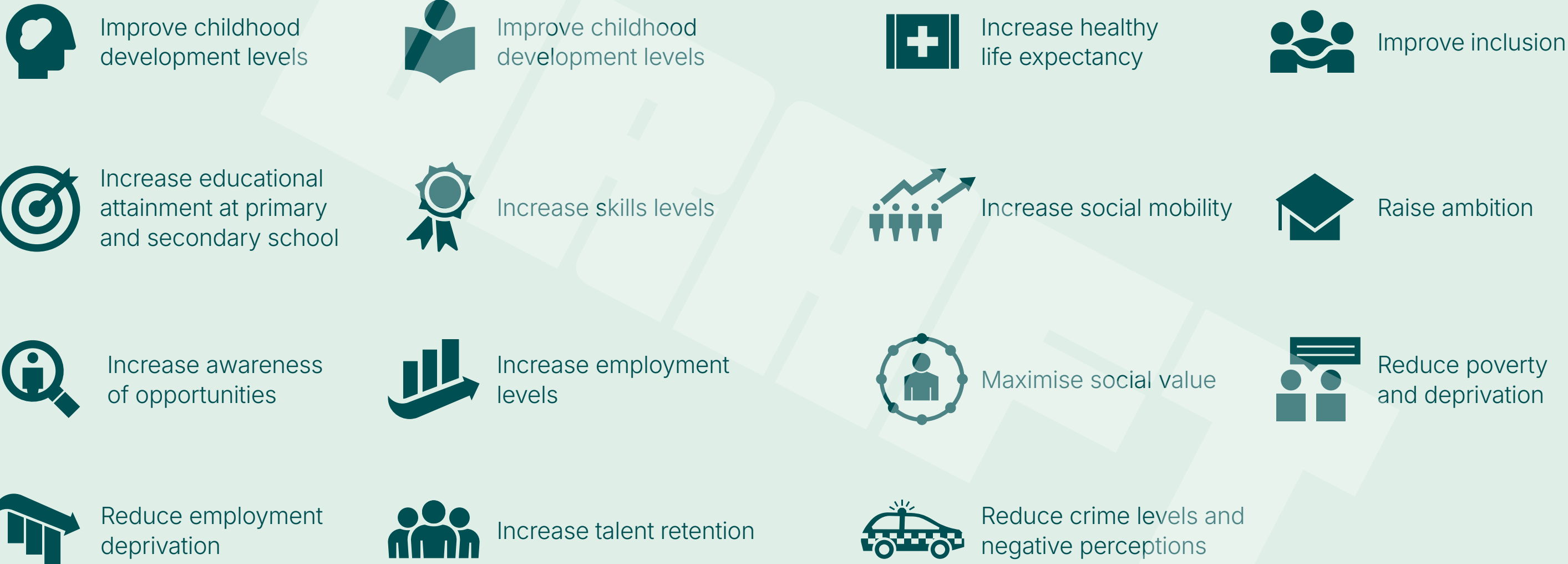
Furbd have partnered with North Tees and Hartlepool NHS Trust Digital Midwives team to help distribute devices to expectant mothers who need improved access to digital services and online support during pregnancy. For many families, something as simple as having access to a smartphone can make a significant difference. These devices help expectant mothers to stay connected with healthcare professionals, access essential pregnancy information and appointments, use digital health services, and feel more informed, supported and confident throughout their pregnancy journey.

Through partnerships like this, Furbd helps strengthen the impact of local charities, councils, schools, and health services by providing refurbished technology through trusted frontline organisations already working directly with residents.

They are just one of the incredible and invaluable organisations which work tirelessly in our region's voluntary, community and social enterprise sector to improve the lives of everyone in Tees Valley.



STRONG COMMUNITIES



REMARKABLE BUSINESSES

Businesses are our wealth creators and continue to fuel economic growth and generate opportunity. Tees Valley is a place where entrepreneurial spirit meets dedicated, skilled people and a supporting ecosystem – when combined this offering far exceeds perceptions.

Our region's business landscape is made up of c99% SMEs, which have countless success stories that continue the global achievements of the industries that once dominated our skyline. Tees Valley champions this business growth and our local authorities actively progress planning applications at speeds which are the envy of many other regions.

Despite this, there are significant pressures and asks on our businesses, with more to be done to increase business births and scale-ups, for example. We want to make Tees Valley the default destination for starting and growing a business, so visible, measurable progress must be made on the following areas to realise this aim – and be guided by the voice of business.



AV DAWSON

AV Dawson is a family-owned and family run, multimodal port and logistics business which plays an important role in the Tees Valley's industrial landscape. Founded in 1938, it is still led by the Dawson family. The group owns and operates the Port of Middlesbrough and a range of operations covering port services, road haulage, rail freight and industrial services across its approximately 100 acres of riverside sites.

As part of their investment and growth, AV Dawson has invested over £10million in recent years to expand and modernise the Port of Middlesbrough, supporting regional regeneration and attracting new business to the area. The firm also owns and operates storage and warehousing for a wide range of customers.

As a multimodal logistics hub, AV Dawson connects Tees Valley businesses to national and international markets via road, rail and sea – this connectivity is vital for business involved in energy, construction, agriculture and automotive.

The business promotes long-term stewardship, local roots and re-investment in its assets. Its key values are safety, integrity, family and resourcefulness, with a goal to build a legacy in Tees Valley and cement its position as a good corporate citizen and to give back to people locally.

The company carries out charity work, volunteering and has hosted upwards of 2,000 school children for visits to the site to give them an insight into work in the maritime sector. With more than 80 years of continuity and service from its Middlesbrough base, AV Dawson has positioned itself as, and remains, a regional anchor for manufacturing and energy supply chains.

AV Dawson is a key partner in regional projects such as the Tees Maritime Cluster and the Teesside Freeport, which are designed to accelerate economic growth, attract investment, and create jobs.



REMARKABLE BUSINESSES



Improve business environment



Increase business births



Increase access to finance



Increase spinouts



Improve business survival rates



Increase business density



Increase scale-ups



Improve investor readiness



Increase innovation



Increase productivity



Increase exports



Increase levels of R&D spending



Increase jobs

OUR COMMITMENTS

To grow our economy, build thriving places, strong communities and remarkable businesses we will work collaboratively to deliver our commitments.

EVERYONE SHARES IN OPPORTUNITY

- We will grow the value of the Tees Valley economy, increasing our contribution to the national economy and putting more money into local communities.
- We will ensure local people and business benefit directly from growth, creating thousands of good jobs and supporting our priority sectors.
- We will work towards full employment in well-paid jobs, so everyone who wants to work can access opportunity.
- We will reduce poverty and deprivation by creating better jobs to increase household incomes.
- We will ensure growth is shared, so every part of Tees Valley benefits from our success.

PEOPLE ARE PROUD TO LIVE, WORK & BELONG

- We will transform our towns and regeneration sites into thriving, investable places.
- We will deliver a world-class transport system that connects people to jobs, businesses to markets and our region to the world.
- We will increase the supply of high-quality housing and commercial space, supporting both communities and business growth.
- We will build on Tees Valley's quality of life, combining affordability, connectivity and culture to attract people and investment.
- We will become the UK's first truly Smart Region, using digital infrastructure and innovation to transform how we live and work.

PEOPLE SUCCEED & THRIVE

- We will raise ambition and support people to stay local and go far, building careers in Tees Valley's growth sectors.
- We will improve health, wellbeing and life chances across all communities.
- We will build a highly skilled workforce aligned to our major industries, working with employers, colleges and universities.
- We will reduce barriers to work and increase participation, helping more people into employment and progression.
- We will grow and retain talent, ensuring Tees Valley is a place where people build long-term careers and return to live and thrive

OUR SECTORS POWER A SUSTAINABLE FUTURE

- We will build on our industrial heritage to capitalise on our assets and lead the industries of the future.
- We will establish Tees Valley as the UK's premier net zero industrial cluster, leading the transition to low-carbon industry.
- We will grow our digital and creative sectors to national prominence, making Tees Valley a centre of innovation and creativity.
- We will diversify our economy to reduce risk and strengthen resilience against future shocks.

BUSINESSES START, GROW, INVEST & LEAD

- We will make Tees Valley one of the UK's most investable regions, unlocking our Freeport, Investment Zone and major regeneration sites to secure global investment.
- We will position Tees Valley as a confident, outward-facing global region, attracting investment, talent and opportunity.
- We will turn opportunity into delivery at pace, using our proven ability to land and deliver major projects.
- We will make Tees Valley the default destination to start, grow and scale a business.
- We will support our businesses to increase innovation, productivity and exports, enabling them to compete globally while building a stronger, more diverse economy.
- We will increase business density and unlock local supply chains, ensuring growth is rooted in our communities.



DELIVER PROSPERITY

Delivering regional prosperity – increasing outcomes for people and businesses, futureproofing our industries and economy, growing our communities, culture and tourism and ultimately, putting more money in people’s pockets – will continue to be a collective effort.

It means using existing partnerships, assets, powers, levers and funding – all with a fixed focus on achieving our collective vision for Tees Valley, building upon the journey we have been on.

Recognising the collective effort required, Government has agreed to work with us even more closely to address three areas that represent our most significant opportunities and limitations to growing the economy – these shared priorities will be used to guide national and regional policy interventions.

Shared Priorities with HM Government



SKILLS AND EMPLOYMENT

Increase the skills base and reduce economic inactivity to help residents rejoin or increase participation in the workforce and support them into better employment opportunities. This will deliver a more joined-up approach which addresses local workforce challenges, providing the talent pipeline for key growth sectors.



TRANSPORT

Improve transport accessibility and travel experiences to better connect workers across the region to employment and industrial sites. This will support residents to access more economic opportunities, with businesses better able to attract talent across a wider geography and facilitate growth and inward investment.

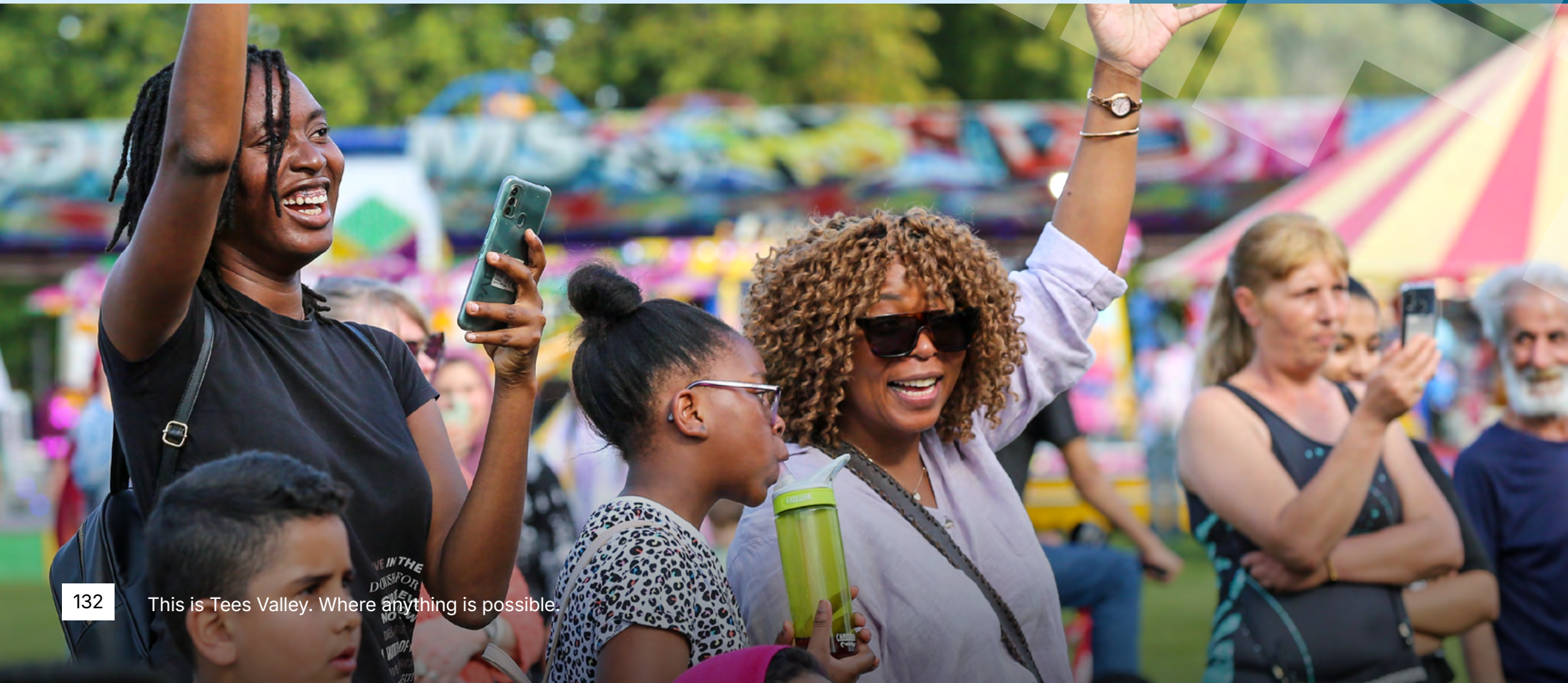


HOUSING AND COMMERCIAL DEVELOPMENT

Increase the availability and viability of high-quality commercial land and space, such as office, industrial, research and development space, and appropriate housing, to increase business density and to attract and retain talent. This will provide the foundations for greater business investment and expand available talent for businesses, boosting growth and productivity in key sectors.

To find out more visit

www.gov.uk/government/publications/local-growth-plans-england/agreed-shared-local-growth-plan-priorities



Government is, however, not the only partner needed to deliver prosperity. We also want to ensure that our businesses and communities secure the most out of any procurement activity taking place here. To do this, we are committed to reviewing contracts at the outset of the procurement process to determine whether they can be segmented into “lots” where appropriate. A lot is a way of breaking a procurement into smaller pieces, allowing suppliers to bid for one, some, or all parts rather than the entire contract. This will support greater participation of regional specialists and avoid the consolidation of requirements into larger contracts typically best suited to direct – known as Tier 1 – suppliers.



Through our procurement practices and pathways, we will increase supply chain engagement through pre-tender market engagement activities, while facilitating introductions between Tier 1 suppliers and relevant local businesses capable of acting as subcontractors. This approach will foster strong working relationships and lead to improved opportunities for all parties.

Pre-tender market engagement also enables us to connect the supply chain with the voluntary, community and social enterprise sector to support regionally focused, needs-based social value commitments from suppliers, ensuring a positive and lasting impact on the region.

The partnerships we have and are building go beyond procurement, including (but not limited to) our Local Visitor Economy Partnership which was established in partnership with VisitEngland.



Scan here to read more about our approach to procurement



Scan here to find out more and see the latest list of partnerships

Through this, Tees Valley will continue to collectively support destination management and unlock opportunities to enhance our region’s tourism offer.

Our joint working with strategic housing leads regionally and nationally – including the Tees Valley Housing Partnership and Homes England – will continue to unlock housing delivery and regeneration. These partnerships recognise the role Tees Valley Combined Authority plays in conjunction with our local authorities on housing and planning, and how our responsibilities will change in time, reflecting the national devolution agenda.

As a region, we are committed to building and deepening partnerships to foster greater collaboration as we collectively work for the benefit of our communities and businesses – finding synergies and setting the standard for best practice.



The Tees Valley **Devolution Deal** transferred powers for skills and employment, transport, planning, and investment from central government to our region. Since 2016, this has enabled Tees Valley Combined Authority to create an investment fund with the focus of investments being set out in our **Investment Plan**.

The Investment Plan made initial allocations covering:



TRANSPORT



EDUCATION,
EMPLOYMENT
& SKILLS:



BUSINESS
GROWTH



CULTURE
& TOURISM



RESEARCH,
DEVELOPMENT
& INNOVATION



PLACE

Since 2019, the Investment Plan has risen in value as more powers and funding have been handed down from central government to support our work to create jobs, drive economic growth and transform the region.

By December 2024, 10,671 direct jobs and 7,096 indirect jobs were created in the Tees Valley with £1.48billion (Gross Value Added) being added to the economy. This equates to economic growth of 9% in real terms between 2014 and 2022, compared with a 6% increase between 2006 and 2014.

To make sure this economic growth is felt and realised in our communities, we will continue to meaningfully influence central government with the support of our region’s Members of Parliament, work with our partners, maximise social value and use existing powers and levers which have been granted to us. These levers include our Mayoral Development Corporations, Tees Valley Investment Zone and Teesside Freeport which are all focused on job creation, supporting regeneration and business growth and investment.

Our Mayoral Development Corporations have played an important role in advancing regeneration through progressing site preparation, securing planning permissions, establishing development frameworks and working with partners to accelerate town centre renewal – creating strong foundations for continued investment and delivery. We intend to use them to further strengthen partnership working with our constituent authorities to ensure regeneration is delivered collaboratively, reflecting local priorities.

The Tees Valley Investment Zone and Teesside Freeport will continue to create the conditions for investment and innovation, supporting our existing strengths and significant potential in the sectors of the future. Our region is already positioned to capitalise on the extra government support and accelerated delivery on offer so the full potential of these programmes and Tees Valley can be realised.

- Creating investible sites and places
- Landing investment and supporting local businesses to invest
- Growing sectors and supporting local economic growth

These programmes, powers and funding will be used with public and private investment to progress our evolving Investment Pipeline, which will respond to our region’s needs and wider environment. This includes future devolution.

Our Investment Pipeline has the ambition to boost regional competitiveness and build resilience through maximising investment across Tees Valley to bring forward key strategic projects, programmes, sites and investments that have the greatest impact to the economic and sustainability of the region.

From these strategic projects, programmes, sites and investments, six priority packages have emerged that have specific significance for enabling regional economic growth.



Scan here to see our full investment pipeline

INVESTMENT PIPELINE PRIORITY PACKAGES

Five of the packages are centred on our distinct Local Authority areas – each capitalising on their unique positioning and assets. These five are complemented by a sixth which is focused on the river and coastline. All six packages represent different types of investment opportunities over varying timescales and will require a range of partners to deliver.

Much like the river that gives our region its name, the packages flow together seamlessly. Each intervention has been considered and designed to provide region-wide benefits, ensuring Tees Valley will continue to be more than the sum of its parts – a region that is inventive, surprising and unstoppable all at once.

Tees Valley's Gateway

Transforms Darlington into a highly connected regional entry point, leveraging rail investment, town centre regeneration, and new commercial, residential, and STEM assets to attract business services, boost innovation, and drive inward investment.

Regional Care & Health Innovation

Develops a major health and care cluster centred on Stockton and Tees Central, integrating new clinical facilities, housing, education, and digital health innovation to address inequalities, support life sciences, and strengthen regional connectivity.

Digital Core

Positions Middlesbrough as a leading digital and tech hub through infrastructure upgrades, investment zones, improved transport connectivity, and town centre revitalisation to attract talent, support business growth, and enable a smart region.

Our River & Coastline

Enhances the River Tees and coastline as a unifying regional asset through placemaking, transport links, tourism development, environmental resilience, and investment promotion to support economic growth and quality of life.

Creative Destination

Builds a vibrant creative and cultural economy centred in Hartlepool, through regeneration, production facilities, heritage assets, and innovation hubs, enhancing tourism, supporting creative industries, and strengthening regional identity.

Industrial Strength

Expands globally significant industrial and clean energy clusters from their core locations in Redcar and Cleveland by leveraging deep-water ports, chemical processing expertise, and major brownfield sites to attract investment in offshore wind, SAF and advanced manufacturing.

TEES VALLEY'S GATEWAY

The Tees begins its journey in Darlington with the river, as a natural asset, complemented by our rich railway heritage and infrastructure. The development of the Stockton & Darlington Railway drove forward – much like the river – our towns to the East and transformed transport across the globe. Indeed, railway lines in our region have evolved along the path of least resistance, enabled the movement of people and goods, and influenced our towns.

Many of our region's visitors, potential investors, government and business representatives and individuals providing key economic benefits will also start their Tees Valley journey in Darlington. The £140million transformation to Darlington station provides an enviable gateway to the region, showing the shared level of ambition for Tees Valley while increasing rail reliability north and south, east and west, and boosting capacity for local and national rail services.

As well as a confident first impression, this has made Darlington the best-connected northern town in the UK, increasing Tees Valley's value proposition by facilitating further integrated infrastructure. It will link directly to other major regional developments, such as the 70-hectare unused Tees Marshalling Yards, creating a new community. The third phase of the Middlesbrough Station development will equally enhance Darlington's redevelopment, as will other rail improvements underway and planned in all five boroughs.

Taken together, this increased public transport connectivity will foster further possibilities for innovation, accessing opportunity and connecting our region to the rest of the world, enabling Tees Valley to lead the charge once again.

Developing the one-mile radius around the station will enhance connections with the strategically important Science Park and link to Darlington's town

centre redevelopment. This presents the largest and most ambitious regeneration initiative since the town centre was remodelled in the 1960s and 80s. The plan earmarks several town centre sites for redevelopment capitalising on Government's investment in the new Darlington Economic Campus (DEC) and will contribute significantly towards Local Growth Plan priorities

Interventions include a new commercial district with modern Grade A office space that will support the professional and financial services clustering around DEC, while a new residential quarter will bring a sustainable mix of town-centre homes. A new 45,000sq ft STEM centre will provide state-of-the-art Technology Enhanced Active Learning to boost educational attainment, productivity, and Tees Valley's position in modern industry and advanced manufacturing. These interventions, alongside the creation of additional garden villages and increasing the West End housing offer, will ensure affordability for young people moving to the area to work in the region and those employed in York, Newcastle and even further afield.

Collectively, these development proposals have the propensity to both seed and grow new investment opportunities in key growth sectors outside London. The availability of Grade A offices, within a high-quality public realm setting, residential development, alongside a science park, and with immediate connectivity to London and Edinburgh provides a catalytic platform for growth; particularly across Business and Professional Services, as well as Bio Manufacturing sectors. These phased plans also have the potential to create a strong ripple effect, with the spill-over economic benefits extending into neighbouring local authorities. New well-paid service and science related roles from new business will be created, with a renewed vibrancy across the town centre's retail and amenity core, and it will also create new supply chain gains for our existing business base.

REGIONAL CARE & HEALTH INNOVATION

Stockton-on-Tees uniquely borders three of our boroughs, sharing or connected to many regional assets, such as Teesside International Airport to the west and connections to Middlesbrough via Thornaby, Newport Bridge and the Transporter Bridge to the east. It is the most connected of our boroughs, so interventions proposed in the town will cross boundaries.

Stockton's ambitious Waterfront Park development links the town centre to the Tees once more. But it goes further than that, opening extra direct access to North Thornaby and onwards into Middlesbrough. This will be facilitated by Tees Central, to support and expand Stockton's plans through physical public realm work and by helping develop other assets connected to its plans.

Tees Central is set to become one of the UK's largest brownfield regeneration sites. The 70-hectare unused Tees Marshalling Yards will be developed into a new community at the heart of Tees Valley, with 3,000 homes and one million sq ft of employment and commercial development, providing a platform for significant investment in new clinical facilities. Its location would create a new gateway into Middlesbrough, tying the two towns closer together

A major part of this is the nationally significant Care and Health Innovation Zone cluster, combining 110 hectares of land. This will provide health and care facilities to support the needs of local people and address health inequalities in Tees Valley. It will deliver new infrastructure, an environment to nurture health innovation, and new housing to support the needs of people of all ages.

The Tees Valley Care and Health Innovation Zone will strengthen existing national health assets given its focus on the digitisation of healthcare, such as the Middlesbrough-based specialist James Cook University Hospital. The region was also recently chosen to be the home for a new NHS 111 Contact Centre in response to growing demand for the service.

Support for a Teesside University Medical school will further tie the towns together. Additional education provision at FE level, along with skills and employability support in the sector, would back both Stockton and Middlesbrough in ambitions to become centres for excellence in medical education, research and provision.

Plans will see both direct and indirect effects on businesses such as Fujifilm Biotechnologies, based in Billingham and with an R&D site at Redcar's Wilton Centre, and the Darlington Science Park's Life Sciences and Bio Manufacturing research and development offering.

DIGITAL CORE

Moving along the Tees to Middlesbrough, you come to the Port of Middlesbrough – the first in a long line of waterside ports, quays and developments providing a large network of vital logistics operations. This vast shipping environment is an exemplar of each borough playing to its strengths and assets but pulling together to provide an interconnected economy.

As central as this is to regional prosperity, Middlesbrough is looking to the future through a digital sector that continues to be the fastest-growing outside of London. The £150billion UK Tech Prosperity Deal with the USA shows incredible scope for growth and the £160million Tees Valley Investment Zone – backed by Teesside University – will be supporting the town's offer to bring the benefits to businesses across the region.

This includes Hartlepool as Digital, Augmented Reality, Virtual Reality and other augmented and 3D capabilities become ever more important to creative, TV and film industries. Stockton, contributing more than a third of the region's economic output, will also benefit from industrial and sector digitalisation.

To support this exploding sector, infrastructure is key. Our priority here is firstly the third phase of the Middlesbrough Station development, with the creation of a new platform. This will magnify station redevelopment in Darlington and those underway and planned in all five boroughs. It will enable more connections to London, bringing cluster growth by securing inward investment alongside knowledge-sharing and workforce development with the capital.

Town centre revitalisation and retail consolidation will free up former retail premises for other uses. Investment Zone plans will also include a project

to make the town centre safer for the public and businesses, including hospitality and the nighttime economy. By capitalising further on our assets such as the Riverside Stadium and building on the momentum of recent gigs by Take That, The Killers and Arctic Monkeys, alongside Middlesbrough Town Hall and independent venues, we can shape a stylish town akin to London's Shoreditch.

This focus on placemaking and quality of life will help attract and retain talent, including students from Teesside University, and secure investment. Middlesbrough's unique "feel" will work alongside the creative environment we aim to curate in Hartlepool. With increased public transport connectivity, cross-pollination of digital, creative, nightlife and culture is as possible here as London (approx. 30 mins from Soho to Shoreditch by Tube, approx. 30 mins between Middlesbrough and Hartlepool by rail).

New young professional housing in Gresham and Middlehaven will give those in our digital and creative sectors attractive, affordable places to live alongside the cluster. An Eastern Gateway of hospitality and hotels will provide capacity for an increase in the tourism and visitor economy.

As well as making our region a better place to live, study, work, invest and visit, and priming it for investment, the totality of these interventions will support ambitions to become the UK's first truly Smart Region. It will build on our digitalisation work with projects such as the Urban Traffic Management and Control system, Digital Trade Testbed and others to create opportunities for all local people and businesses, ensuring every community is digitally connected and able to access education, employment and services with confidence wherever they live.

CREATIVE DESTINATION

Hartlepool, like Redcar, sits on one side of the mouth of the Tees and, like Middlesbrough, is an anchor location for our Investment Zone through digital and creative – and has different but complementary offer.

The redevelopment of the town centre and its assets has long been under way, with previous TVCA investment into Church Street, the Northern School of Art and other sites to develop its Innovation and Skills Quarter in West Hartlepool. Hartlepool Borough Council, its Town Deal Board, Hartlepool Development Corporation and Investment Zone are now taking this further targeting prime locations for regeneration, such as the Middleton Grange Shopping Centre, Northern Studios expansion and Production Village development.

Future investment would build on this work, creating a thriving cultural ecosystem for the region with flagship cultural venues and heritage restoration projects to enhance tourism, local pride, and economic vitality. More than Tees Valley's other boroughs, Hartlepool's relationship to the river Tees is marked out by its rich maritime history, told through the National Museum of the Royal Navy. That is just one asset – Hartlepool Museum, the Heugh Battery Museum, its Folk Festival – that could be leveraged to position the town as a leading destination for such experiences, enhancing tourism, local pride and economic vitality.

Work will be undertaken to develop a network of advanced business hubs and innovation corridors within and outside the cultural, creative and screen industries to attract investment, support SMEs and foster high-growth sectors. In particular, supporting independent retail on Church Street could make it the go-to destination for young creatives and those in the screen industries.

If Darlington is the gateway to the region, Hartlepool will be the lens through which it's viewed as film and TV work through the Production Village puts the wider region on screens across the country. As a cultural and heritage hub, it will be positioned as the base from which visitors explore Tees Valley as interest in screen tourism grows.

Middlesbrough will work as the region's digital core, enabling the ambitions of all our towns. Equally, it is home to its own creative capital, such as the Middlesbrough Institute of Modern Art, the Turner Prize, Middlesbrough Art Week and huge cultural events such as Mela and Taste of Africa. The aim is to make Hartlepool a creative environment similar to Hebden Bridge – known as one of the most quirky, modern and stylish places in the UK. However, its links to Middlesbrough and the ease of cross-pollination between the towns and their differing but harmonising offers is essential to develop both the digital and creative sectors.

As you head south towards North Gare and – ultimately – Redcar, the sectoral landscape begins to change, focusing more on clean energy by the mouth of the Tees. While the creative industries in its centre undoubtedly play a large part in Tees Valley's future, Hartlepool's innovative streak can also take advantage of the civil nuclear strategic opportunity to diversify and futureproof its economy to the south. Centrica and US-based X-energy are building up to 12 Advanced Modular Reactors (AMRs) at the existing Hartlepool Nuclear Power Station site. This is also designated for new nuclear under the Government's National Policy Statement.

INDUSTRIAL STRENGTH, INDUSTRIAL GROWTH

Redcar and Cleveland is known for its fantastic beaches, seaside towns and dramatic coastline – but this beauty is also matched by its industrial strength.

Redcar is central to three of the largest sectors of regional investment enquiry – Chemical & Process, Clean Energy and Advanced Manufacturing. Global businesses are committed to investing tens of billions of pounds into these. They are also vital to further growth in Clean Energy – Offshore Wind, Carbon Capture Utilisation and Storage (CCUS), Sustainable Aviation Fuel (SAF) – Critical Minerals and Defence.

SAF is key to Government's Advanced Manufacturing Sector Plan, decarbonising aerospace technologies and delivering more efficient technologies to reduce carbon emissions for sustainable air travel.

Tees Valley has been identified as a SAF manufacturing location by several companies, all developing feasibility and engineering studies. These new projects will add value to, and benefit from, our knowledge embedded infrastructure, R&D facilities and lab space. Our Chemicals & Process sector is one of Europe's leading locations for fermentation at scale, with knowledge from biofuels, food and feed production transferring to the production of SAF and biochemicals. Additionality comes from Teesside International Airport which will work with firms developing SAF on its testing and adoption.

This proposition relates to developing the offer and international competitiveness of Redcar's world-leading assets – such as some of the deepest ports on England's east coast. This port infrastructure on the Tees's south bank will attract future offshore wind occupiers, with the Crown Estate's future seabed leasing of 6GW in 2027 in the North Sea. Quayside and dry dock infrastructure supports new growth opportunities in Defence, with naval vessel and submarine related projects in progress.

Wilton International is Britain's largest chemical complex with large-scale pre-consented land for industrial development, enabling businesses to deliver projects quickly and cost-effectively. The profile of occupants within the site is evolving due new market and policy directions, including battery storage, data centres and SAF interests. Site enablement and upgrades provide a huge opportunity to the wider industrial cluster, particularly Stockton's Seal Sands, North Tees and Billingham sites, enhanced by a plan to raise the cluster's profile.

Adjacent to Wilton International is the Wilton Centre, one of Europe's largest R&D facilities, housing several leading global and regional businesses in chemical, manufacturing, material and life sciences.

Teesworks is Europe's largest brownfield site, with connectivity primed for activity adjacent to the River Tees and North Sea and including CCUS and offshore renewables interests. The SeAH Wind monopile facility is an anchor tenant, on a 4.5million sq ft of state-of-the-art offshore wind manufacturing, backed by the Steel River heavy lift quay. The 45-metre quay has planning permission for a 400-metre quayside extension so it can accommodate the growing needs of the offshore wind sector. Additional capacity would significantly reduce congestion at the port, allowing more vessels, reduced wait times, and attracting further investment.

This offer is also augmented by PD Ports' plans to bring forward c200 acres at Teesport, Teesport Offshore Gateway, for offshore wind-related use. The deep-water quay infrastructure at Redcar Bulk Terminal, which fronts c300 acres of employment land, offers an additional platform for growth.

Further development of Teesworks and Wilton are critical to the renewal of Redcar and the surrounding area. Building on regeneration projects in this area, such as Redcar central station and the Regent Cinema, will help revitalise Redcar town centre by reshaping the high street offer through new leisure, hospitality and housing investment.

OUR RIVER & COASTLINE

Finally, we circle back to the region's biggest environmental gift – the Tees itself. It has helped shape Tees Valley and define its towns, but there is still more to be done to unlock its true potential as a unifying asset and create a coherent waterfront identity.

As detailed throughout each of these packages, investment has already taken place to better connect the Tees with our towns. For example, Stockton's Waterfront Park, provides the opportunity for direct walking and cycling links to the new urban community development at Middlesbrough's Middlehaven.

Hartlepool Waterfront was previously awarded £20million by TVCA to be developed as landmark destination with a mix of civic, cultural, leisure and visitor attraction uses to complement the restaurants, cafes, bars and shops around Hartlepool Marina. Continued support will see this link more widely with the cultural and creative aspirations of the town.

The region's unique coastline, traditional beaches such as Seaton Carew, Redcar and Saltburn-by-the-Sea and the opportunity for walking and cycling tourism along the Cleveland Way are heavily promoted by our Destination Management Organisation. Saltburn has undergone recent gentrification, but capital funding would allow Redcar & Cleveland Borough Council to undertake maintenance and enhancement of its promenade, cliff, pier and Valley Gardens. These, and further developments in hospitality and supporting attractions – for example Seaton Carew, Coatham, Redcar and Kirkleatham – will prove a major driver for the tourist and visitor economy and increase spending on our high streets. Further investment will mitigate coastal erosion and further improve flood defences.

The delivery of a package of interventions to restore the Transporter Bridge could improve connectivity between Port Clarence in Stockton and Middlehaven in Middlesbrough. Restoring a much-loved icon of regional ingenuity and industry would enhance civic pride and increase tourism.

Industrially, an investment prospectus, marketing strategy, and implementation/delivery plan for the North Tees site will be developed to raise the profile of the cluster and attract inward investment. Its current landscape will be assessed to identify opportunities for growth, diversification, and decarbonisation. Further support to develop our river and coast-based infrastructure and facilities, such as the Steel River Quay expansion, will unlock additional capabilities of key sites in Middlesbrough, Hartlepool and Redcar.

Our region is working to progress to Established Mayoral Strategic Authority status in the future.

This will bring greater freedom and control over the funding that comes into our region through an Integrated Settlement and the option to propose further powers, funding and partnerships – adding to the already expanding Devolution Framework. We will continue to proactively work to drive opportunity, strengthen our region’s foundations and deliver prosperity in line with this plan, with our efforts being guided by our high-level local growth and shared priorities.

High-Level Local Growth Priorities:

 **Grow our globally competitive modern industrial and technology cluster** – which includes the Chemical and Process, Clean Energy, Life Sciences and Biomanufacturing sectors – **and enabling Advanced Manufacturing sector** by securing further investment, deepening our innovation expertise and attracting and retaining talent.

 **Accelerate our rapidly growing digital cluster and creative cluster** by securing further investment, growing our business base and attracting and retaining talent.

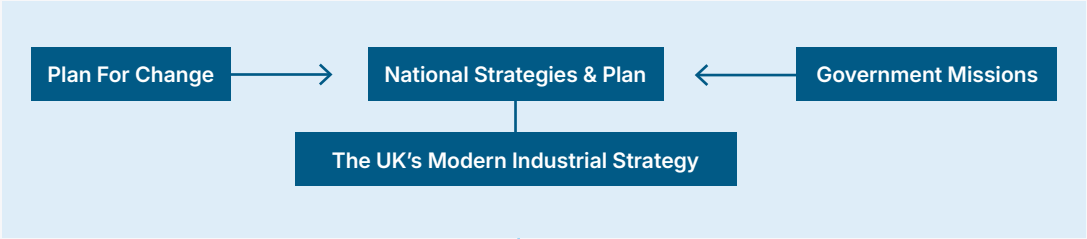
 **Diversify and drive the growth of our foundational economy** by increasing business density and developing the skills of our people to get more people into work.

 **Create the environment for growth and accelerate regeneration of our communities**, making Tees Valley an attractive place to live, study, work, invest and visit.

 **Accelerate the development of strategic transport, energy, digital and housing infrastructure** to maximise the potential of our growth opportunities and create the environment for growth.

In keeping with this direction and to ensure we realise the regional prosperity we are collectively working to achieve, we are developing a new outcomes framework to align strategies, monitor progress, ensure delivery and provide confidence that the results of a growing economy are experienced throughout Tees Valley. Our Plan for Regional Prosperity – which takes the place of our region’s Local Growth Plan – is not a standalone document.

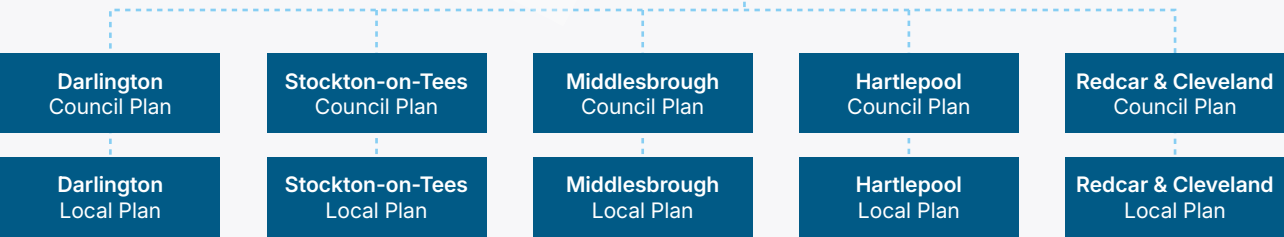
NATIONAL



REGIONAL



LOCAL





EMBED RESILIENCE

Just as Our Plan for Regional Prosperity does not operate in isolation, nor does our region. This is known all too well in Tees Valley, due to past overreliance on a single industry – albeit one which our region is rightly still proud of, and which put us on the map.

However, this dependence has now lessened considerably due to the hard work of many since the closure of Teesside Steelworks, which helped reposition our region and diversify our economy, ensuring history does not repeat itself.

For instance, our area is actively securing the future of our current industrial sites through decarbonisation initiatives to separate them from price changes. We remain committed to continual regeneration and advocating for ourselves to get the most out of and for our region – Tees Valley Combined Authority has an active business growth programme to strengthen our businesses and supply chains and are accountable for the work of the North East & Yorkshire Net Zero Hub. The Hub

was established in recognition of the importance of energy as an enabler and the need to work with partners to progress our region towards a low carbon, clean growth future with a view to reducing energy bills through schemes like community energy, retrofit, clean energy installations and heat networks.



Scan here to view our business support offer

This further resilience and co-working can be seen in a number of projects across our sectors. The Northern Mayors have united over the Great North programme to elevate the voice, visibility and economic impact of the North.

In the creative sector, Tees Valley Combined Authority's leadership of the North East Screen Industries Partnership has led to a 131% surge in production spend across its footprint, with £65million GVA and has led the North East to become the fastest growing area for screen industries – this growth has also resulted in Tees Valley growing faster than anywhere else in the North East.. Additionally, the Northern Music Export Office is driving international growth for local talent.



Tees Valley Combined Authority, Teesside University and CPI, working with York and North Yorkshire Combined Authority and the University of York have also launched a bio-industrial cluster of cross-sector partners. This aims to create 5,000 skilled jobs, growing the bioeconomy sector by £5billion and launching 100 innovative start-ups.

This is all-important as, like elsewhere, Tees Valley is not immune to economic headwinds, environmental and societal challenges, and global uncertainty. What sets Tees Valley apart is that, due to our experiences, our region knows better than most the importance of embedding resilience due to the learning we have done.

We know we must be responsive to current challenges and future uncertainty by actively building a regional economy which has resilience embedded and puts past setbacks behind us, whether that takes the form of resilient communities, businesses, infrastructure, assets or offering – creating an area which is agile and can determine its own future. A future which has sustainability and greater prosperity at the centre.

At its core, a resilient regional economy is one which can respond to and recover from challenges. How quickly a region can do this depends on the strength, capacity and collaboration of various actors, networks and institutions. In Tees Valley, we are actively building a resilient region with the right structures to ensure we can adjust quickly – devolution and effective working amongst our constituent authorities and voluntary, community and social enterprise sector have played key roles in this to date, in addition to the amount of funding our region receives from central government. We are committed to building upon this.

Resilience also comes from a region's residents and the strength of our communities. This often primarily takes the form of a higher skilled, adaptable and larger workforce through increased labour market participation in diverse, innovation-driven sectors. It is for this reason that we will continue to monitor how our sectors interact as well as develop in relation to one another – we must consciously build resilience through a blend of diversification as well as deliberate connection.



Scan here to view our evidence base

Through developing this plan, we have created an extensive evidence base – reviewed and approved by the Office for National Statistics – that has been supplemented by extensive engagement. This has provided us with a snapshot of our region's economy as well as the businesses and people which are based here, identifying areas of strength, opportunity and challenge. Combined with any learnings we can take from our peers, our region has strong foundations to navigate and turn any future uncertainty into opportunity.

While the future is hard to predict, through embedding resilience we want Tees Valley to become a byword for opportunity – a region where people can grow and start a family or business with confidence that our area provides a prosperous, sustainable and resilient future. The safe harbour which Tees Valley can offer should also attract a greater share of international investment from a range of sources, further adding to the opportunity on offer here in our region by enabling us to broaden our portfolio and strengthen supply chains.



CHANGING TEES VALLEY

To ensure we realise our vision and change the region's future for the better, we must monitor our performance against a new set of key outcomes indicators to demonstrate the impacts of Our Plan for Regional Prosperity – put simply, we know that what gets measured, gets delivered.

These indicators have been co-developed with central government and are therefore closely aligned with national outcome frameworks without losing focus of the real impacts we want to achieve across our region.

On this basis, the new Local Outcomes Framework for Tees Valley will mirror the six high level measurements used by the Department for Business and Trade to monitor progress in support of the **UK's Modern Industrial Strategy**. These outcomes include updates on the key drivers of economic growth and living standards: investments, the number of large 'home-grown' business enterprises, labour market outcomes, productivity, trade and gross value added.

These outcomes will need to match our strategic priorities and align with the impacts we want to achieve. Over the next ten years, we want to continue to grow the Tees Valley economy and increase its total value. To do this, we will need to create thousands of new jobs and increase the regional employment rate.

We also want to continue to create thousands of new businesses and increase household incomes, so that fewer families experience economic hardship and more money is put in people's pockets. This will ensure that, amongst other things, poverty and deprivation are addressed through systemic interventions and change while working alongside, but not putting undue burden on, the voluntary, community and social enterprise sector.

Added to this, we intend to continue to strengthen the skills base in Tees Valley by increasing the number of working age residents with higher level qualifications and we want to continue to improve conditions and regional health outcomes, to bring these more in line with national trends.

The new Local Outcomes Framework for Tees Valley will monitor all these metrics – and more – to ensure that we can measure the impact of our plan and provide assurances and confidence to our communities, local businesses, strategic partners and central government.

We propose to monitor this plan regularly and produce periodic reports of our performance – these will be published on our website and form part of our routine governance arrangements. As part of the reporting process, we will also provide more detailed updates on all the outcomes linked to the numerous projects and programmes which underpin our investments and delivery of Our Plan for Regional Prosperity.

Finally, in due course, we will commission an independent evaluation of the plan that will include a detailed analysis of the overall impact of our investments and our collective efforts to grow the regional economy, improve living standards for residents and regenerate our neighbourhoods and communities.

This is crucial as achieving our vision for the region requires the work of all of us to play our part – we encourage you to be a part of our journey to make Tees Valley prosperous.

Economic Indicators



Investment

Securing a greater share of public sector investment, foreign direct investment from a baseline of £5.5billion and incentivising businesses to increase their investment in people and machinery.



Business

Expanding the total business base from a baseline of 17,450 in addition to improving the business density rate from a baseline of 63.0.



Labour Market

Working towards full employment in a well-paid job for anyone who wants one by increasing the employment rate from a baseline of 71.9% in addition to boosting job density from a baseline of 0.71.



Productivity

Improving productivity (GVA per hour worked) from a baseline of £35.40 in addition to increasing GVA per job filled from a baseline of £55,284.



Trade

Advancing our international trading position by raising the value of total goods exported from a baseline of £2.96billion.



GVA

Increasing our contribution to the national economy through boosting our region's gross value added from a baseline of £16.7billion.



GET INVOLVED



Scan here to help make
Tees Valley a prosperous region



For more information contact
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