

A Rising Tide



Together, building Cornwall's
vibrant tech community.

Foreward

Cornwall is proving that big ideas don't need to come from big cities. This strategy shows how a rural and coastal economy can use technology to create opportunity, raise aspirations, and build a stronger future for the people who live and work here.

Cornwall's geography brings challenges, but it also drives creativity. It forces collaboration, demands resilience, and sparks innovation in ways larger, more connected places often take for granted. That makes it the perfect place to test how technology can unlock growth and support a fairer, more inclusive economy.

At the heart of this plan are young people and communities who believe the future can be built here. It's about giving them the confidence, skills, and opportunities to do just that and showing that tech isn't just an industry, it's a route to better jobs, social mobility, and local pride.

This paper is a call to act with ambition and belief. Cornwall's tech sector is established, connected, and growing fast. Backing it now and continuing to take informed risks will pay dividends for the region and the country. Cornwall doesn't just have potential, it has momentum.



Katie Gallagher OBE
Chair of UK Tech Cluster Group





Cornwall's tech economy has grown faster and stronger than many predicted but we do need more support and access to finance to continue this trend.

At Tech Cornwall, we're proud to be in our 12th year of supporting this growth and championing the community behind it.

We know running a business here brings unique challenges but also massive potential. Over the past few years, we've helped of companies access support, build partnerships, and grow their teams right here in Cornwall.

Our commitment to inclusion is demonstrated by projects like Tech Frontiers and our other Educational outreach programmes which have seen over 1500 young people participate in an ambitious programme to improve social mobility through tech skills in the last 12 months.

We have had adult learners through our career pathways and skills programmes, all helping to build aspiration and grow the talent pipeline.

Our flagship event Agile on the Beach contributes approximately £500,000 GVA each year and attracts global brands, allowing us to showcase Cornwall, grow these connections, and create business development opportunities on our doorstep.

We are building a sector that supports growth and aspiration across all of Cornwall. One that's greener, more inclusive, and shaped by collaboration.

We do this through skills, events, sharing opportunities, outreach, advocacy and connecting people. We're working to make Cornwall the best place to start, run and grow a tech business.

This document sets out the why and what we need to maximise the opportunity of a flourishing tech sector. If you're already a member: thank you. If not: we'd love you to be part of what comes next.

Holly Patton
CEO, Tech Cornwall

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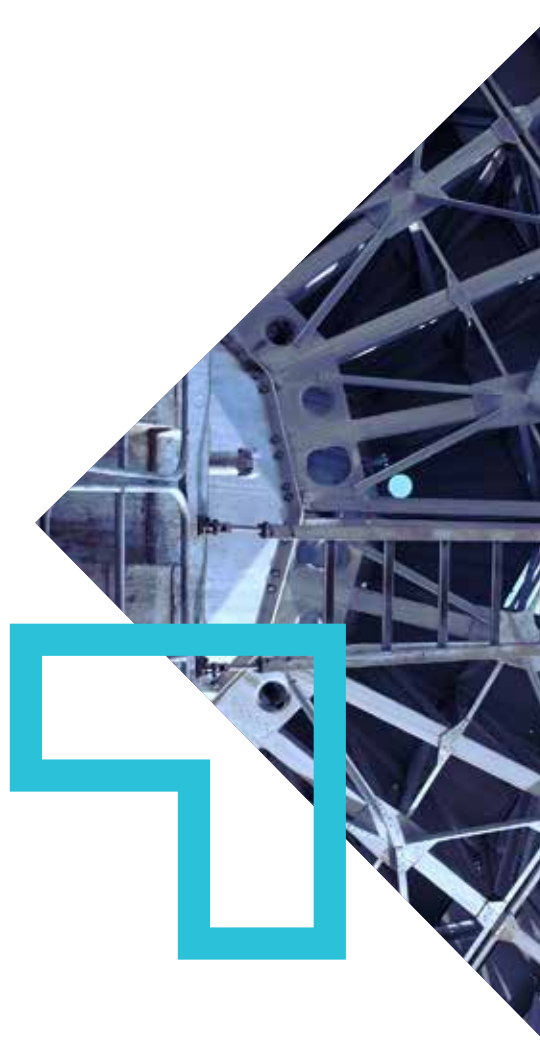
Introduction

This paper is designed to be a sector-led roadmap for government, industry and education collaboration.

It identifies the key subsectors that will drive the realisation of Cornwall's ambitions for a clean, green, economy, and focuses on five key actionable strategies for growth that benefits us all:

1. Grow and support tech clusters
2. Build networks
3. Shout about what's good
4. Use our collective voice
5. Invest in the skills pipeline at all levels

If we don't act now, we will fail to realise the ambitions of local, regional and national industrial strategies. Growth and innovation will be stifled, and current high levels of underemployment and unemployment will be exacerbated. If investors choose to prioritise central urban businesses and clusters, local businesses will lose out and we will see the sector shrink rather than grow.



What do we mean by the Tech Sector?

The Tech Sector is hard to pin down. Blurred boundaries with creative industries and limitations in traditional classification systems like SIC (standard industry classification) codes make an agreed definition impossible. Platforms like Data City have more granular categorisation but this still isn't perfect, especially for self-employed and micro-businesses (which in Cornwall make up the majority). DSIT's recent sector mapping and Tech South West's prospectus seek to clarify the sector by identifying priority areas and subcategories (e.g., AgriTech, AI, CleanTech, SaaS), but definitions remain fluid.

Perhaps the very fact that it is hard to pin down underlines the point that Tech is less of a sector in itself and rather a horizontal enabler spanning diverse activities.

A vision for thriving: What good looks like



“We’re now at a new crossroads, one where we must decide if AI will be used for the betterment or to the detriment of society.”

Tim Berners Lee, 2025

With the right conditions, Cornwall’s Tech sector could increase by 75% and deliver £4billion of GVA in 2030.* But the Cornish Tech sector isn’t just concerned with growth. It wants better things for Cornwall.

Focus groups with leaders from the sector described a thriving sector as one that had:

- Inclusive and circular economic growth
- A collaborative, industry-responsive skills system
- Positive environmental, social, and local development impacts
- A future-proofed and connected digital infrastructure

A thriving tech sector would create higher wages, productivity, and, if attention is focused on the key enabling subsectors, would contribute to mitigating climate change. With AI and automation becoming deeply ingrained across sectors, right now we have an opportunity to shape what these frontier technologies are used for and who is benefiting.

This desire to grow the sector for the common good is echoed in the Cornwall Plan for 2025. One of the six aims of this plan is *A Digital Revolution for Sustainable Living: “By 2050, Cornwall is a nationally recognised leader in digital innovation and inclusion: a place where technology powers a thriving, fair and green economy, and where people of all ages, backgrounds and abilities are empowered to thrive, adapt and lead in a changing world. From early education to lifelong learning, from creative industries to care, digital is a force for good, connecting communities, enabling opportunity, and shaping a healthier, more prosperous Cornwall for all.”*

This vision is absolutely reliant on a thriving Tech sector. And at the moment, there are multiple barriers to overcome.

The reality: Where we are now

Tech companies make up 12% of the companies operating and registered in Cornwall & Isles of Scilly, and produce a GVA of £2.3billion. Growth in the Tech sector was extremely strong pre-2020 (and still the fastest in the southwest according to a Tech South West report in 2022). However, this growth has slowed, mirroring a national picture where we saw a drop of roughly 120,000 jobs between 2023 and 2024. (gov.uk).

There are massive gaps in skills and access to talent.

- 76% of occupations in Cornwall require digital skills, but severe shortages exist at intermediate and advanced levels
- Only 52.5% of roles are filled by those with the required intermediate skills
- Cornwall ranks 32nd of 37 regions in matching local skills to employer needs

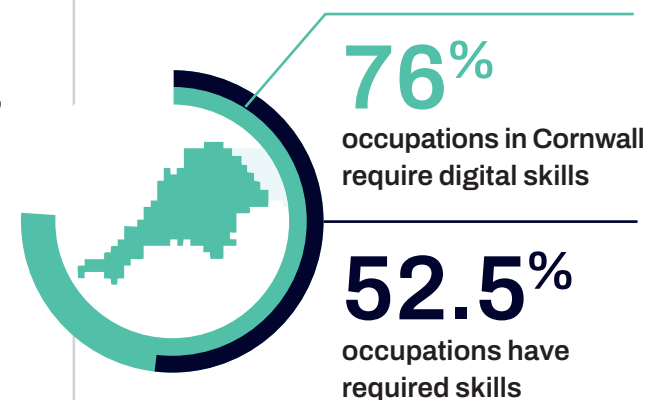
There is a growing digital divide: Our access to high-speed connectivity is slipping far behind national levels, and 2025 data on digital exclusion puts Cornwall as one of the most “at risk” areas in England.

But the picture is not all negative. 1 in 8 companies in Cornwall (3,250) are Tech

according to the Data City’s Real-Time Industrial Classifications (RTICs). Two thirds of them are micro or small, highlighting the need to focus on scaleups. The sector employs 16,000 people and is a magnet for funding. Since 2005, the Tech sector attracted 65% of all investment into Cornwall, including £23m from Innovate UK. The sector has contributed 13% of Cornwall’s GVA as a whole since 2010, and despite women only representing 30% of directors of Tech businesses here, the average GVA contributed by those businesses is nearly 10% higher.

Read more in Tech Cornwall’s Data Dashboard, available for free to members.

The Skills Gap:



Strategy: How we'll get from here to where we want to go

There are five key sectors that feature across Cornwall's local economic growth plan, the Great South West's regional ambitions, and the UK's national industrial strategy. They all rely on a strong tech sector to support and should be our "best bet" to focus on.

They are:

- Clean Energy for Net Zero
- Advanced Manufacturing
- Space & Digital/Tech Innovation
- Creative Industries
- Marine & Maritime

We know from Tech Cornwall's State of Cornwall report that some industries are already overrepresented in Cornwall. Companies specialising in Space, Software as a Service, Marine, Quantum Technology, Energy Generation, Robotics, Design & Modelling, and the Geospatial Economy are more than twice (and in some cases three of four times) as likely to be found in Cornwall than the rest of the UK.

“ Case Study

Our work delivers innovative software and data solutions that enable collaboration, efficiency, and skills development to support the clean energy sector. We're committed to developing people locally and contributing to Cornwall's reputation as a hub for tech-driven economic growth. Cornwall offers a unique environment for Calc-i's growth. The region is full of positive, innovative people who are open to sharing advice and working together. But to continue growing and succeeding, we need access to high-potential local talent, robust training, and ongoing support for developing both technical and general business skills.

Ben Sewell
Director, Calculated Innovation Ltd.





This means we can identify the types of Tech businesses we need to focus on as enablers to key target sectors.

They include:

- Data analytics
- Quantum communications
- Edge computing
- Robotics
- IoT sensors
- Digital Twins
- Cybersecurity
- AR/VR

As well as being reliant for growth on these emerging disciplines and frontier technologies, the best bet sectors also need a really solid foundation of more traditional tech. They need websites and cloud infrastructure, networks and app developers. And the wider business infrastructure in Cornwall needs payment systems, cyber security, and hardware.

Those businesses are here and ready to fuel the next chapter in Cornwall's future. But they need investment, a strong coherent voice, and access to talent.

“ Case Study

Growth is often measured in profits and whilst that's a big part of it, it's not the sole driver for us. We have created new jobs with care and gradually expanded our team over the years, so that we can provide good quality and sustainable jobs to local talent and wider afield from our base here in Cornwall. That said, over the last two years, we've doubled our turnover and profits and worked with some of our biggest clients to date.

Lindsey Axten
Managing Director,
Buzz Interactive



Investment



There are lots of reasons to invest in Cornwall:

Talent & skills: Three leading universities are creating a strong talent pipeline in digital, creative, gaming, marine space technology. There is lower staff churn than in cities and high investment in skills (£4m invested in digital skills for jobs over the last few years).



Market potential: lower levels of investment historically mean that early movers can secure an advantage.



Competitive cost base: lower operating costs for office and lab space, and subsidised innovation centres.



Thriving innovation ecosystem: Growing clusters and strong sector support from Tech Cornwall, alongside a clear strategy for growing regional specialisms give investors a route into niche high growth sectors.



Infrastructure: First region to get superfast, and growing gigabit coverage, plus subsea cables directly linking Cornwall with the US and the rest of the world, and a spaceport offering global connections.



Place and ESG: Cornwall has a focus on clean and green tech, inclusive tech, and is a globally recognised place. It's the perfect test bed for rural and remote tech solutions.



There are also reasons not to:

Scale and critical mass: the ecosystem is smaller than in cities and there are no “anchor firms”.



Access to capital and networks: fewer local VCs (but lots of untapped wealth).



Perception of remoteness: association with tourism and lifestyle.



Talent pool: strong pipeline but low numbers.



Limited infrastructure: Patchy digital coverage, slow transport to other areas, limited workspace and test/lab facilities.



Our strategy must overcome these barriers and provide a compelling case for investment in those key target sectors.



What we need to do

Grow and Support Clusters

- Proactively growing clusters
- Nurturing scaleups not just startups
- Attracting flagship companies that would act like magnets for others
- Expand innovation campuses, coworking hubs, labs (linked to universities and clusters)
- Think smart about geography – Launceston is a two hour drive from Bristol and Saltash is 3 ¼ hours from Paddington

Build Networks

- Build national/international investor networks
- Build connections with other clusters and regions and contribute to good growth for the whole of the UK
- Create a Cornwall-focused tech investment platform

A strong voice

Tech Cornwall is uniquely placed to bring together the sector and provide a coherent narrative to strategic partners and investors alike. The will to collaborate is high. Tech is represented on both the Economic Forum and Workforce and Skills board, and forms one of the six aims in the Cornwall Plan as well as being a cross-cutting theme in the local Industrial strategy (the Good Growth Plan).

Nationally, the tech sector is positioned as a vital driver of the government's industrial strategy, powering innovation, productivity, and sustainable growth across every part of the economy. We are in a strong position but we need a strong story. One that demonstrates the unique blend of businesses, strong sense of social purpose, and Cornwall's sense of place.



What we need to do

Shout about what's good

- Build a strong brand for Tech in Cornwall
- Market Cornwall as digitally central (global data cables, spaceport)
- Celebrate successes and build a compelling investment story
- Use existing platforms (e.g. Agile on the Beach) to promote Cornwall as a place to grow

Use our collective voice

- Grow membership of Tech Cornwall
- Promote the Cornish Tech supply chain and the integral part it plays in increasing productivity in the county and diversifying the economy
- Lobby for improvements in things outside the control of the sector, for example transport and connectivity
- Join the campaign for digital inclusion and increased workforce digital skills, for example by joining the FutureDotNow charter



Case Study

This programme has allowed me to take the first step into tech as it offered a wide variety of subjects and gave me the opportunity to sample various different fields within the computing sector. I've gained a better understanding of what I want to do. I've had guidance from professionals and developed skills and confidence which have helped in applying for roles in DevOps and Cyber. I know I'll be more confident and will perform far better in interviews.

Neve Hoccom
Tech Cornwall
Gateway
into Tech
participant



Access to talent

Despite strong investment in skills programmes, a focus on talent pipelines needs to remain a key focus. Research this year by TEC Girls found that just 2% of students in Cornwall (of all genders) were interested in a coding-related job. Tech Cornwall's recent Digital Skills Assessment tells us that 76% of jobs in Cornwall & Isles of Scilly require digital skills and 23.6% are "advanced" level e.g. (coding, CAD, software development). And yet 62% of advertised roles had no local applicants with required skills.

There is a mismatch between industry need and the skills delivered by schools and FE. This is compounded by high levels of digital exclusion, low wages, high levels of self employment, and an aging population. The result is a bleak projection for the skills and talent required to support growth in the tech sector, and consequently a ceiling for growth in the industries targeted by regional and national industrial plans. This report should provide motivation for education, skills and careers advice providers to focus their delivery to the best bet industries. Tech Cornwall's Digital Skills Assessment provides further data and direction for industry, education, and local government.



What we need to do

Invest in the skills pipeline at all levels

- Improve graduate retention by strengthening links between universities and industry
- Recruit "boomerang talent" – people who want to return to where they grew up
- Continue to provide a joined up approach to digital skills and focus investment on high performing skills programmes that create jobs
- Influence the curriculum review and delivery in Cornwall
- Provide meaningful work experience and visibility of careers to school students
- Improve data granularity by creating a local skills observatory
- Target digital exclusion, aligning with the new digital inclusion strategy for Cornwall & Isles of Scilly



We often find it hard to employ people from Universities because many degrees are so out of date."

Headforwards, 2025

What next?

Cornwall's tech sector has proven what's possible when creativity, collaboration and community come together. The next five years are our opportunity to turn potential into momentum and momentum into lasting change. The strategic sector group will write an action plan based on short (2026), medium (2027-28) and long (2029-30) term horizons.

We know we need to see funding specifically for Tech Innovation, further investment in skills and education for Tech careers. It's essential that we see improvements to the digital and physical infrastructure in Cornwall and that we recognise the importance of the Tech Sector in the Supply chains and in its own right. This is how we deliver the industrial strategy (Good Growth Plan). It's important that these actions must be owned and delivered collectively by industry, education, and local government. But that action needs to be properly resourced and centrally coordinated.

Tech Cornwall is perfectly positioned to continue to make progress across all three areas: investment, skills and education, and providing a strong joined up voice for the sector.

We rely on fees from memberships, growth funding, earned income and partnerships to do what we do. £500k a year for the next five years would mean we can continue delivering an Academy to fuel the tech talent pipeline, deliver impactful skills programmes and track work outcomes, work with schools, deliver events, networking opportunities and masterclasses for members, influence policy and help to attract funding, and contribute to fair and inclusive economic growth.



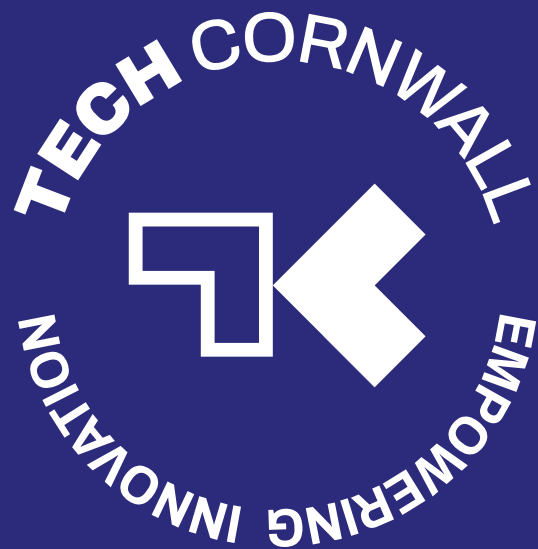
But we could do so much more...

£1m per year over the next five years would enable the organisation to deliver at scale what's required to fuel those five industries - Clean Energy, Advanced Manufacturing, Space, Creative, and Marine – that are so strategically important to Cornwall & Isles of Scilly.

That investment would deliver a comprehensive work experience programme for Cornwall, providing tech-embedded experiences across multiple sectors, industry led qualifications, and new apprenticeships tailored to target sectors and roles. It would mean we could create a member to member platform and a startup and scale up programme alongside rich data to support growth and investment plans. It would mean increased visibility for Cornwall through advocacy and promotion beyond our boundaries. Ultimately, it would mean a higher chance of reaching that potential 75% growth and £4 billion in GVA by 2030. But crucially it would also increase opportunities to improve social mobility, unlock high-value, fair jobs, and deliver a digital revolution for sustainable living.

The investment and commitment we make today will define the kind of economy, society, and environment we leave for the next generation. Cornwall has the ideas, the talent, and the determination. With ambition and alignment the tech sector will fuel a fairer future.





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