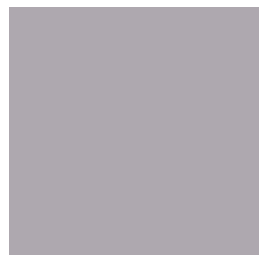
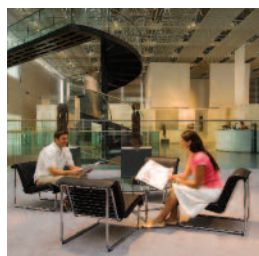
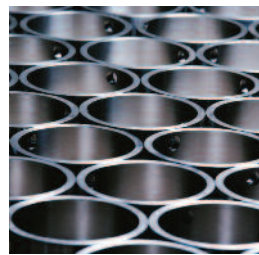


# NEWANGLIA

Local Enterprise Partnership  
for Norfolk and Suffolk

## SECTOR GROWTH STRATEGY

February 2013



In Partnership with



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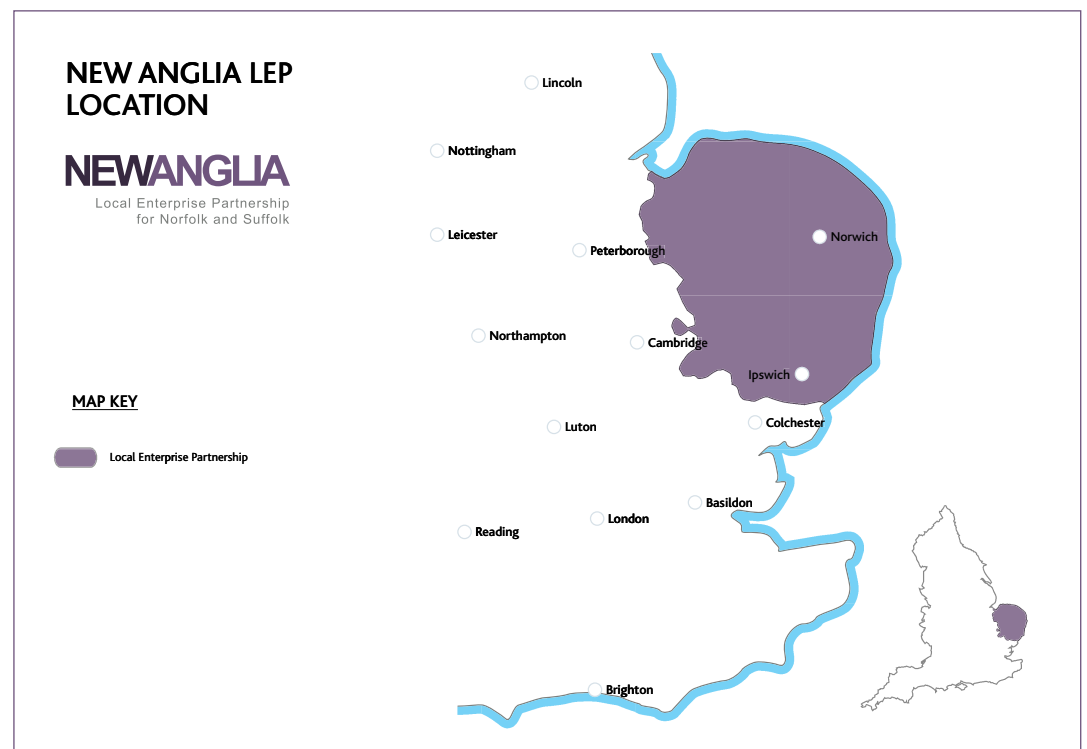
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# 1

## SECTION A: A FRAMEWORK FOR SECTOR GROWTH

### Introduction and Purpose

- 1.1 Norfolk and Suffolk are fortunate to have strong concentrations of nationally, and some globally competitive sectors. New Anglia has identified the importance of sector development in creating jobs and growth and is committed to working with key sector groups to support their aspirations. The New Anglia Business Plan has identified the following nine growth sectors:
- Advanced Manufacturing;
  - Energy;
  - ICT;
  - Ports & Logistics;
  - Life Sciences & Biotechnology.
  - Digital & Cultural Creative Industries;
  - Food, Drink & Agriculture;
  - Financial Services;
  - Tourism;
- 1.2 In each of these sectors there are real assets that can be levered to support future growth, providing business and employment opportunities for all. New Anglia is in good shape to nurture what is already a compelling and powerful set of credible industries with world-class assets and highly skilled individuals. We recognise there are other significant sectors in Norfolk and Suffolk including retail and construction.



- 1.3** While the direct resources available to New Anglia are limited, the LEP has a critical role to play in promoting, lobbying and co-ordinating activities to unlock opportunities and address barriers to growth.
- 1.4** This strategy, which sits alongside the New Anglia Business Plan, provides a high level framework for sector growth and the supporting role that the LEP will play in working with each of the identified sectors. It will be up to the sector groups to refine and drive the activities.
- 1.5 This strategy is presented in five sections:**
- Section A – sets out the rationale for sector development and identifies the key sectors included in the framework;
  - Section B – summarises the opportunities, challenges and actions associated with each sector;
  - Section C – provides details on critical success factors and creating the conditions for growth; and
  - Section D – summarises the key actions for New Anglia, the private sector and Local Authorities.
  - Annex A – Lists more detailed Areas for Action from the issues papers.

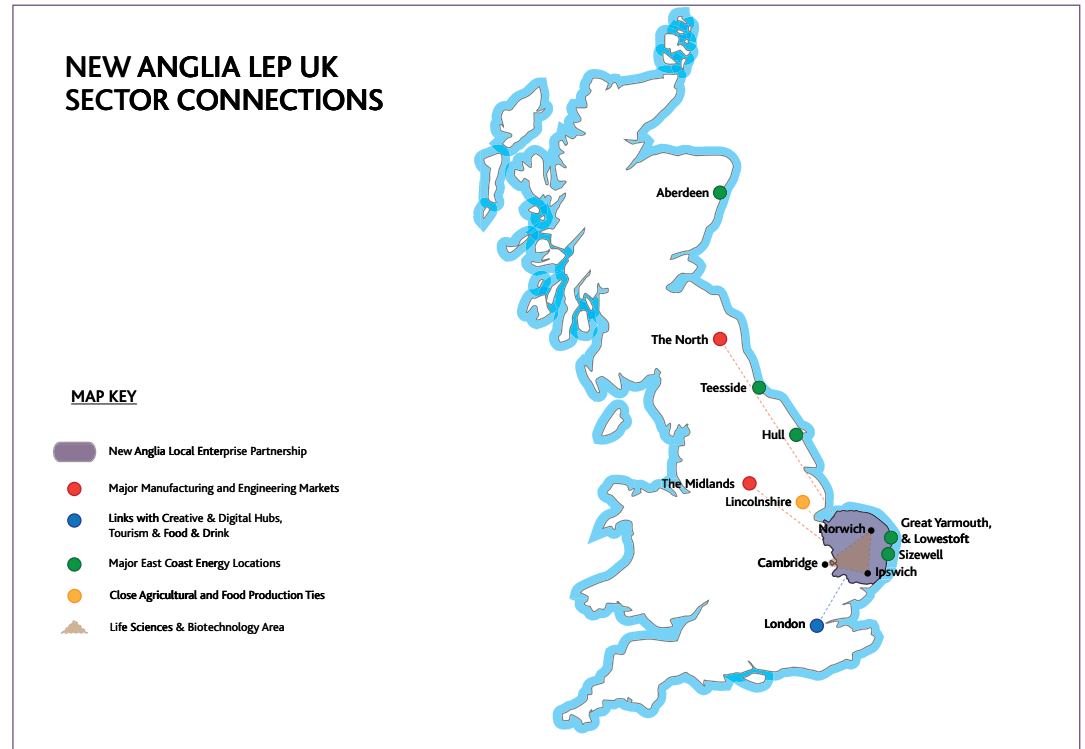
### Why sector development

- 1.6** The theory for sector and cluster development is well established<sup>1</sup>. The potential benefits of a sector approach for Norfolk and Suffolk include building a skilled workforce, strengthening supply chains, realising economies of scale, promoting innovation, accelerating business start-ups, and sharing marketing costs and market intelligence.
- 1.7** The fragility of the UK economy means the Government is urgently pushing a growth agenda and encouraging businesses to strengthen their competitive advantage. The key aspects of sector-based strategies<sup>2</sup> typically include four sequential stages: mobilisation, diagnosis, the development of effective collaborative growth strategies and their subsequent implementation. New Anglia's sector groups are at various stages along this continuum, some have yet to meet, others have a very clear idea of what they want to achieve. The sectors too are at varying stages of maturity and what is required for an embryonic sector like life sciences may not be appropriate for a more traditional or established sector like ports and freight.
- 1.8** In terms of the successful features of a sector or what a sector growth strategy might include the DTI work cites a mix of critical elements, contributory factors and underlying complementary measures. Some of these factors are simply characteristics that exist, others may require some action or a "nudge" in the right direction. They will differ by sector depending on their make-up, characteristics and maturity.

<sup>1</sup> See for example Michael Porter's Competitive Advantage of Nations (1985), the DTI's Critical Success Factors for Cluster Development (2004), or recent work from the McKinsey Global Institute (2010)

<sup>2</sup> Adapted from DTI, 2004 (pgs. 10 - 11)

- 1.9 Critical success factors include strong formal and informal networks, ability to access and nurture a strong skills base and well-developed research structures, and other forms of innovation. Contributory factors include the presence of large firms, an effective supply chain, entrepreneurial spirit and adequate support infrastructure. Trade and investment and access to finance are also important. Many of these critical and contributory factors were highlighted during the consultation phase for this strategy and feature in the cross cutting themes in Section C. In terms of complementary factors, a helpful support environment is paramount as well as practical support for growth and improvement. This is where New Anglia will help to nurture the sector groups' growth aspirations.



- 1.10 To summarise, the theory for cluster development is well documented and fits well with the government's growth agenda. To be successful, sector based strategies require the mobilisation of interested parties (private sector led sector groups in this instance) and robust diagnosis to inform their activity. This framework seeks to accommodate growth strategies for New Anglia sector and clusters at various stages of joint working and levels of maturity in their lifecycle.

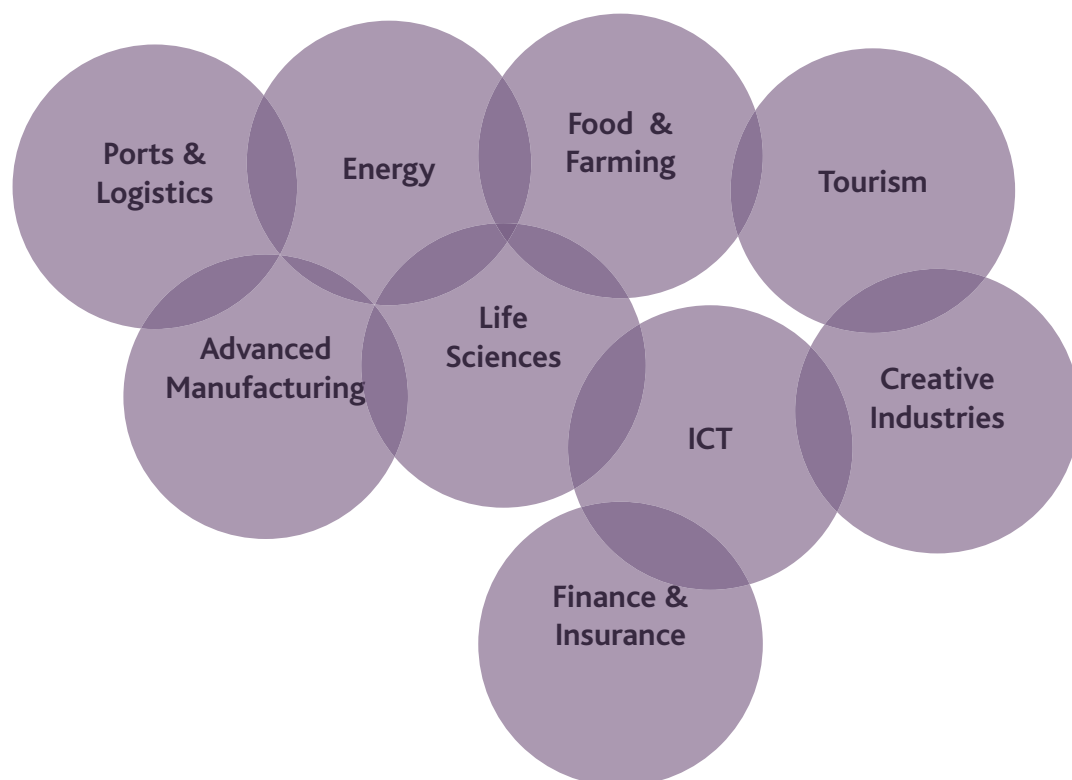
### Sector opportunities

- 1.11 Collectively, the nine priority sectors are of significant value to the economy both in terms of GVA, high value, high skilled employment and growth potential.

## Economic Contribution

Employment (2010)	Growth in Employment (2008 – 2010)	Number of Businesses (2010)	Growth in Business Base (2008 – 2010)	GVA (2010)	GVA Per Employee (2010)	Business Turnover (2010)
236,916	8,545	19,988	-1,468 (-6.8%)	£11.8bn	£49,859	£35.8bn

- 1.12** It is common for businesses to operate across sectors, for example, a manufacturing company that produces components for the offshore energy industry could be classed as being in Advanced Manufacturing or the Energy Sectors. This means that the actual value of individual sectors is often underestimated, since a business can only be registered under one sector under the Government's Standard Industrial Classification (SIC) Codes. In Health and Life Sciences, due to the fact that a great deal of support staff are employed by research and/or support companies and originations means that the SIC Code estimate of employment in the sector is a value of 1,081. However, the actual number employed in the sector is far greater, as Norwich Research Park alone employs over 2,400 scientists with over 8,500 support staff (source, Norwich Research Park Website, November 2012).



- 1 Employment numbers for energy uses a strict definition of energy businesses and under represents the size and significance of the energy supply chain, with many firms classed as engineering or advanced manufacturing. The East of England Energy Group estimates employee numbers at 18,850 across the region and Orbis Energy holds a database of 1,688 potential companies.
- 2 Employment number for life sciences and biotech uses a strict definition of these businesses and underestimates the true numbers employed in this sector which is likely to be nearer 3,000. Many of the jobs in the sector are covered by other sectors. For example 1,640 are employed in manufacture of pharmaceuticals and medical equipment which is classified under advanced manufacturing.

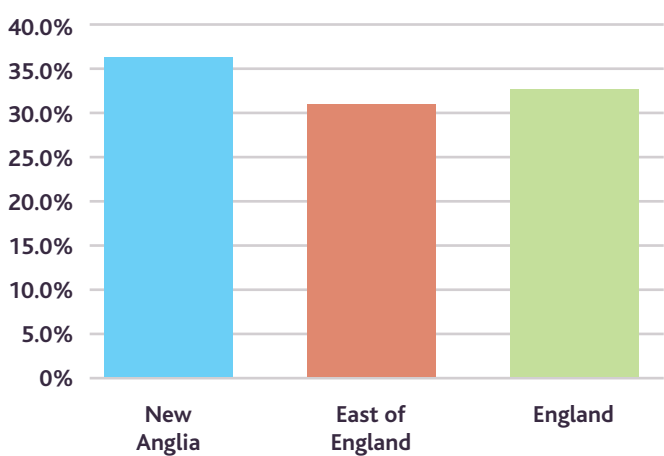
Growth Sector Contribution to the New Anglia Economy (2010)



Employment

**1.13** Growth sectors account for 37% of total employment in Norfolk and Suffolk combined and 36% of the area’s business base. This equates to over 236,916 jobs and 19,988 businesses in growth sectors.

Growth Sectors employment as a percentage of total employment (2010)



## Effects of downturn – and moving towards 're-growth'

- 1.16** Most growth sectors in Norfolk and Suffolk have suffered during the downturn. Between 2008 and 2010, 8,545 jobs were lost across all growth sectors which were more badly affected than the economy as a whole. Almost 1,500 businesses were lost during this time, a more severe loss compared to the regional and national averages. Impact on output was significant, falling from £15.2bn to £11.8bn, with a particularly dramatic fall in Finance and Insurance from £6bn to £3.1bn.
- 1.17** As the various sectors continue to recover from the effects of the economic downturn, there is a strong set of prime assets and planned major programmes which will help to drive growth forward, including:
- Substantial planned investment in **Energy and Ports** sectors over next 8-10 years supporting renewables, offshore energy, oil, gas, nuclear and engineering;
  - **Green Economy Pathfinder area, Enterprise Zone and CORE status** for offshore energy clusters at Lowestoft and Great Yarmouth;
  - Excellence in **Advanced Manufacturing** through the Hethel Engineering Centre and growth plans for Lotus Technology Park;
  - World leading research in **Food, Life Sciences and Biotechnology** at the Norwich Research Park (NRP) and University Campus Suffolk, with a £26m expansion plan for the NRP;
  - Significant assets in fast growing **ICT and Digital Creative** sectors at Adastral Park;
  - A wealth of cultural attractions, rich heritage, strong environmental assets and growing number of nationally and internationally renowned festivals to support the **Tourism and Cultural Creative** sectors; and
  - Well-established, globally competitive **Financial Services** and Insurance sector with strong opportunities for attracting new investment and SME diversification into technology driven niche markets.
- 1.18** It is acknowledged that, for some sectors, it could take up to 5 years for employment to return to pre-downturn levels. The New Anglia Business Plan has made some predictions about where the greatest opportunities for job growth lie. Where possible, details of this are highlighted in the respective sector summaries contained in Section B of this report. In the meantime, the EELGA (East of England Local Government Association) have commissioned Oxford Economics to produce new regional employment forecasts, updating the data sets previously provided by EEDA. Once complete, this exercise will provide a more accurate picture of the scope for employment growth across the identified sectors and can supplement the work undertaken/underway by growth sector lead organisations and input to their own strategies and action plans.

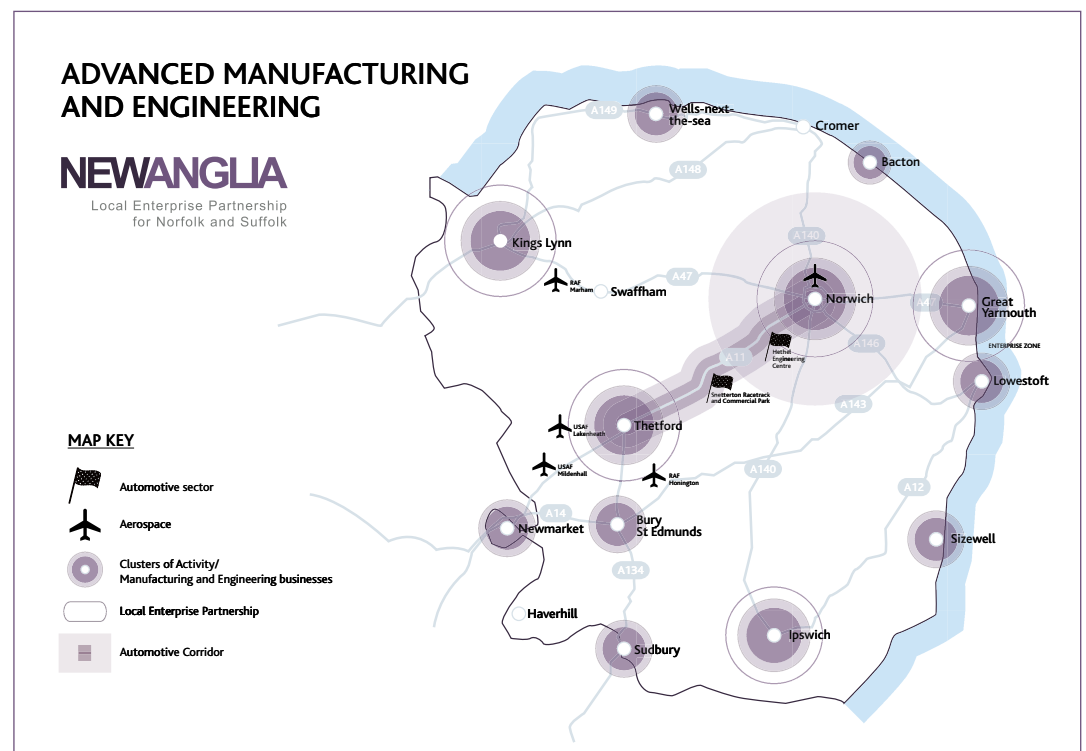


# 2

## SECTION B: SECTOR OPPORTUNITIES AND ACTIONS

### ADVANCED MANUFACTURING

Employment (2010)	24,543
Growth in Employment (2008 – 2010)	982 (+4.2%)
Number of Businesses (2010)	1,025
Growth in Business Base (2008 – 2010)	-100 (-9.6%)
GVA (2010)	£1.5bn
GVA per employee (2010)	£60,261
Business Turnover (2010)	£4.7bn



### Introduction / Economic Geography

- 2.1 Narrowly defined, the sector has around 1,025 companies (2010). They have an estimated business turnover of £4.7 billion and showed an increase in employment between 2008 and 2010 (of 4.2%) when many other sectors declined. They employ some 24,543 people (2010). The sector is worth £1.5 billion to the East Anglian economy. The broader definition used by Hethel and others roughly doubles the number of businesses, illustrating the interdependence of this sector with others such as Energy and Food and Farming.

- 2.2** Advanced manufacturing describes companies using a high level of design or scientific skills to produce innovative and technologically complex (high value) products and processes. The industry is changing with a shift from metal to composite materials or oil to renewable and biological substances; industrial biotechnology, plastic electronics; and new aerospace technologies. The Map shows significant clusters of activity across the LEP area. In Suffolk there are significant employers in the larger towns and coastal areas including Lowestoft (offshore energy), Sudbury (engineering), Ipswich, Bury St Edmunds and Newmarket. Concentrations of electronic business are located in West and East Suffolk. Norfolk has concentrations of businesses in Great Yarmouth (marine, electronics and engineering), Thetford (manufacturing, engineering, auto) and Kings Lynn (manufacturing engineering) and Norwich (electronics, auto and marine). It has businesses in rural settings including several redundant airfields and along the A11 automotive corridor (see map). Examples of Norfolk and Suffolk businesses appear in the Key Issues Paper. There are a number of aerospace businesses around Norwich airport and military facilities across both counties.
- 2.3** Advanced manufacturing and engineering is a truly cross cutting sector. Clean technologies embrace energy, environment, transport, and material. Similarly, the growth of offshore wind energy provides potential for new product development. Links to other sectors include food and drink producers and biotech companies manufacturing chemicals and chemical products. Many businesses rely on the ports for imported materials for production and to ship out end products. The potential development of Sizewell C and the offshore turbine industry offers significant supply chain opportunities.

### **Assets and Priorities**

- 2.4** The Hethel Engineering Centre (HEC) creates a hub for innovation and technology fostering links between business and academia with links to Norwich Research Park and prominent HEIs. It provides a centre for engineering excellence promoting enterprise, technology, innovation and skills development. Located next to Lotus it has focused on the automotive sector and clean technology. It brings together a dispersed supply chain of small businesses to work together sharing each other's strengths and expertise. There is an opportunity to extend HEC's reach further west and south. The private sector led sector group meets regularly and has rebranded to the New Anglia Advanced Manufacturing and Engineering Group (NAAME) and where appropriate is ensuring Suffolk businesses are integrated into its activities. The group will: develop a strategy to grow the network stimulating employment growth; lobby in key areas (skills, infrastructure, innovation, enterprise, sustainability, export, finance and technology); share best practice; and encourage networking and collaboration.

### **Scale of Opportunity**

- 2.5** The emerging need to develop a low carbon economy presents significant opportunities around clean energy production and sustainable transport solutions and the export of high value goods and services. NAAME and HEC see much of growth coming through local organic growth encouraged through formal and informal networks and pilot and innovation programmes. These could include micro clusters around: civil, mechanical, and electrical engineering (Sizewell); manufacturing (Mid and West Suffolk); the offshore energy (Great Yarmouth and Lowestoft and to a lesser degree Wells); and transport (automotive and motorsport). Projects could include building wind turbines, developing a biofuels centre of excellence, and encouraging the marine sector to develop its knowledge, research and development capabilities.

## 2.6 Challenges

The challenges are threefold. First, some manufacturing and engineering companies have found a lack of young people taking up training and apprenticeships. There are concerns local colleges are not wholly meeting employer needs. The ageing workforce necessitates some skills transfer and the promotion of opportunities within sector. Second, Norfolk and Suffolk are isolated counties with relatively poor transport connectivity inhibiting inward investment amongst some sectors such as manufacturing and distribution. This is exacerbated by a lack of critical mass of manufacturing compared with major centres like the Midlands. Finally, the sector is keen to promote sector focused Technology Parks and enterprise hubs offering a range of tailored enterprise and business improvement measures, networking and university and R&D collaborations. This relies on having adequate land availability which is a challenge in some locations requiring close collaboration with local authorities.

### Key Actions

- 2.7** New Anglia will: Support the development of the Norfolk and Suffolk Advanced Manufacturing Group (e.g. in terms of major funding bids); Lobby on behalf of the sector and align national business support programmes; Work with the group to gain a better understanding of the sector, their needs and skills requirements. NAAME with support from HEC will run events, networking opportunities/clubs and encourage participation by Suffolk based businesses. It will provide a credible business-led voice and secure income to deliver business support programs, pilot innovation programs, and business start-ups. It wants to encourage the development of Science and Technology Parks and incubation facilities and raise attainment and aspiration, improve signposting and awareness and encourage local hi tech delivery by learning providers.

## DIGITAL AND CULTURAL CREATIVE INDUSTRIES

Employment (2010)	10,844
Growth in Employment (2008 – 2010)	-1,159 (-9.7%)
Number of Businesses (2010)	1,394
Growth in Business Base (2008 – 2010)	-84 (-5.7%)
GVA (2010)	£401m
GVA per employee (2010)	£36,944
Business Turnover (2010)	£772m

### Introduction / Economic Geography

- 2.8** The creative and cultural industries employ 10,844 people representing 1.7% of total employment in Norfolk and Suffolk combined. The vast majority of jobs are in the cultural creative sector (9,457) with 1,387 people employed in the digital creative sector. Significant sub-sectors include music, visual and performing arts, crafts and publishing. Advertising, architecture, video, film and photography are also important. Employment was severely affected over the period 2008-2010, falling by just short of 10% and significantly higher than across England as a whole.
- 2.9** The sector is worth £401m in GVA. Between 2008 and 2010, this fell by 17.3%. This big loss in output when compared with employment was down to the fact that the highest proportion of employment lost was in the most productive sub-sectors.
- 2.10** The digital and cultural creative industries sector encompasses a very diverse range of business activities across Norfolk and Suffolk. At its broadest, the digital and cultural creative industries sector includes businesses related to: marketing, media and communications; advertising; architecture; crafts; design; designer fashion; video, film and photography; music and the visual and performing arts; publishing; computer games, software, electronic publishing; and radio and TV.
- 2.11** In Suffolk there is anecdotal evidence that there are a large number of smaller arts and crafts enterprises (some of which might be considered as hobby businesses)<sup>3</sup>. Norfolk has a growing creative industries sector with employment levels at 20% higher than the national average with a particular concentration in Norwich.

### Assets and priorities

- 2.12** Norfolk and Suffolk have a thriving digital creative scene with a concentration of digital arts companies located in Norwich in particular. Greater Norwich has a cluster of established businesses in television and media. In terms of the digital creative sector in Suffolk, the majority of workplaces in software consultancy and supply are located in Suffolk Coastal, with a cluster of activity located at Adastral Park, demonstrating the close link between digital industries and ICT businesses. The East of England Production Innovation Centre (EPIC) studios in Norwich are also a potentially major asset to the sector. There is growing potential in the gaming industry linked to the UCS in Ipswich and at Norwich University of the Arts (NUA) which is one of only a handful of UK universities offering games art and design degree courses.

<sup>3</sup> Suffolk County Council, Suffolk's Local Economic Assessment, 2011

- 2.13** Some NUA graduates have gone on to great success, winning BAFTA awards at the recent British Academy Video Games Awards. Across both counties, there are particular strengths in affiliate and web marketing, media and communications. The film sector is growing in importance with the area providing locations for commercials, TV dramas and feature films. There is an increasing desire to realise the commercial potential from the creative and humanities sectors with higher education.
- 2.14** The two Counties boast a number of organisations of national importance: the Sainsbury Centre for Visual Arts at the University of East Anglia, Dance East home to the National Centre for Choreography. The Writers' Centre in Norwich has a growing national reputation and its work has resulted in the City being named as England's first UNESCO City of Literature. The New Wolsey Theatre co-produces with a wide range of theatres across the UK and the Theatre Royal in Norwich, home to a range of drama, dance, operatic and musical productions, has just had its most successful year ever. Norwich University of the Arts has a strong tradition of vocational education in the creative industries with specialities in graphic design and digital content creation.
- 2.15** The year long celebration of Benjamin Britten's centenary in Aldeburgh will attract national and international attention. The Norfolk and Norwich Festival is the fourth largest city festival in the UK and in Suffolk there are successful newer events such as Latitude and the Voewood Festival. Both Counties are rich in major heritage attractions such as Framlingham Castle, Ickworth House, Blickling Hall, Felbrigg, Houghton and Holkham Halls. Norwich is the most complete medieval city in Britain and until the end of the 17th Century was England's second city. It has more than 1,500 historic buildings within its walled centre, including two cathedrals and a complete Norman Castle.

### **Scale of opportunity**

- 2.16** The newly established Norfolk and Suffolk Cultural Board is leading the strategy for the cultural sector and has taken the development of Cultural Tourism as its major focus. This is an area where the two counties underperform and a comprehensive report has been commissioned to analyse the business opportunities to attract a new market, working in partnership with the Tourism and Food and Drink Sectors. New Anglia has many unique cultural assets but is less successful in the area of Cultural Tourism than other parts of the UK. The results of the research should be available in the early spring and success will require a range of sectors to work together within a new structure and strong strategic leadership.
- 2.17** The Tour of Britain has demonstrated the real impact which can be achieved by the two counties working together. In 2012 180,000 people turned out to watch the race travelling through Norfolk and Suffolk. The return on investment has increased each year the race has come to East Anglia. A successful Olympic Torch Relay, with an overnight stay in Norwich generating a spend of £1.8 million in the city, demonstrates a growing capacity in the sector for mounting large scale events which attract new crowds and create income.

- 2.18** There are also opportunities to exploit the potential for growth in the digital industries across the area. However, initial views from the sector suggest that there is a need to better understand the needs of businesses in the sector and the barriers to further growth and development. A Digital Creative Industry Group has been created with membership drawn from NUA, UCS and the private sector. The Group will drive activity for the sector including undertaking any initial research to identify opportunity and need. Graphic design and communications agencies are growing in importance in Norwich and Ipswich and in rural areas such as Newmarket and Southwold. The sub-sector's brand, image and profile locally is really important for the sector's future growth both in indigenous markets and further afield.
- 2.19** Maximising the potential for growth in the sector will rely in part on exploiting the significant links between cultural, creative and digital businesses and other sectors of the economy. The Norwich Heritage Economic and Regeneration Trust is working with the University of East Anglia utilising digital creative technology within a heritage framework. The links between digital creative industries and the ICT sector are equally strong and the opportunity to build upon existing clusters of activity in Greater Norwich and around Adastral Park should not be ignored.

### Challenges

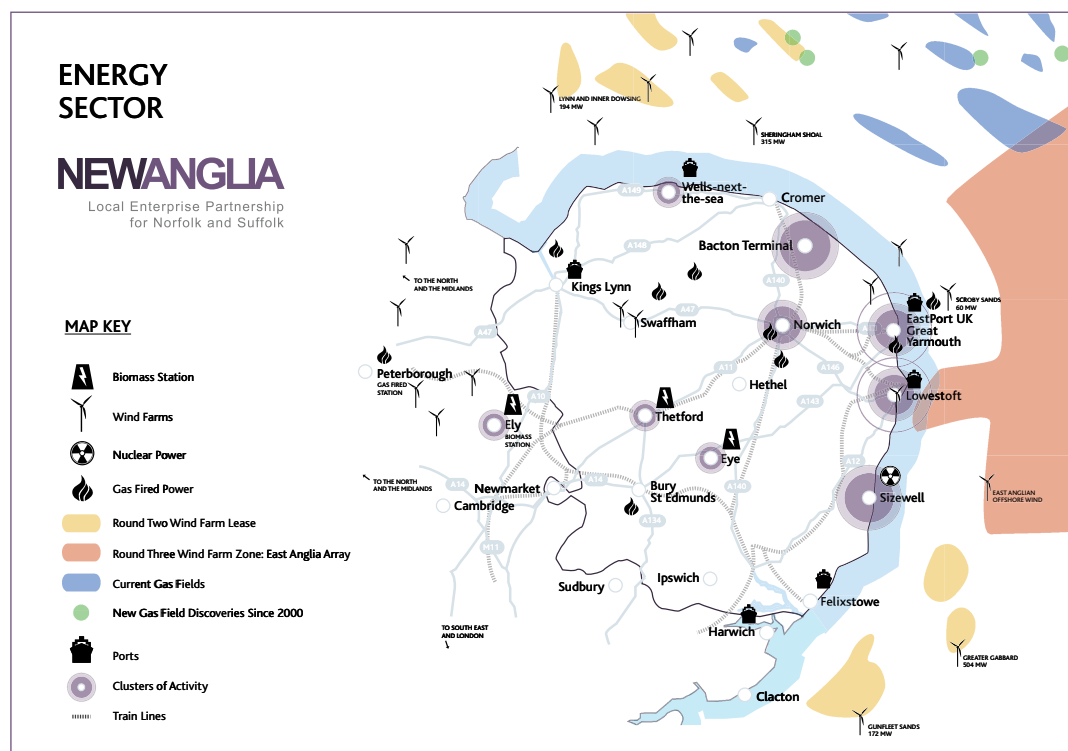
- 2.20** The recession has had a severe impact on the sector – on some parts more than others. The availability of advertising revenue in the economy has been reduced and architects have been affected by the decline of the construction industry. Parts of the creative sector are in the midst of restructuring from the traditional to digital media markets, where accessing news, music and film via the internet poses several challenges such as controlling media privacy, balancing free access with reduced advertising revenue and developing new innovations.
- 2.21** As with many other growth sectors of the Norfolk and Suffolk economies, two of the most pressing challenges relate to skill and fast broadband. Access to superfast broadband is essential for developing digital and multimedia content. Estimates by Creative and Cultural Skills reveal that the current shortfall of skilled technical staff in the creative sector will continue to rise until 2017.

### Key areas for action

- 2.22** New Anglia will: support growth and development of the cultural and digital sectors by encouraging the development of existing clusters around Greater Norwich, Ipswich and Adastral Park; on-going development of Broadband; support the development of new cultural offers for New Anglia; and support formalised joint working between cultural and digital creative industries, tourism and ICT.
- 2.23** The sector will: build a better understanding of the extent and impact of the creative and design industries across New Anglia through economic impact studies; develop and deliver a cultural tourism strategy to attract new visitors, based on market analysis and new cross-sector products; showcase the capabilities of the graphic design and communications sub-sector; develop incubation facilities in Ipswich and Norwich to support digital business start-ups and the cultural sector will investigate the possibility of introducing apprenticeships to address the skills deficit.

## ENERGY

Employment (2010)	7,710
Growth in Employment (2008 – 2010)	-142 (-1.8%)
Number of Businesses (2010)	1,301
Growth in Business Base (2008 – 2010)	+23 (+1.8%)
GVA (2010)	£994m
GVA per employee (2010)	£128,913
Business Turnover (2010)	£2.9bn

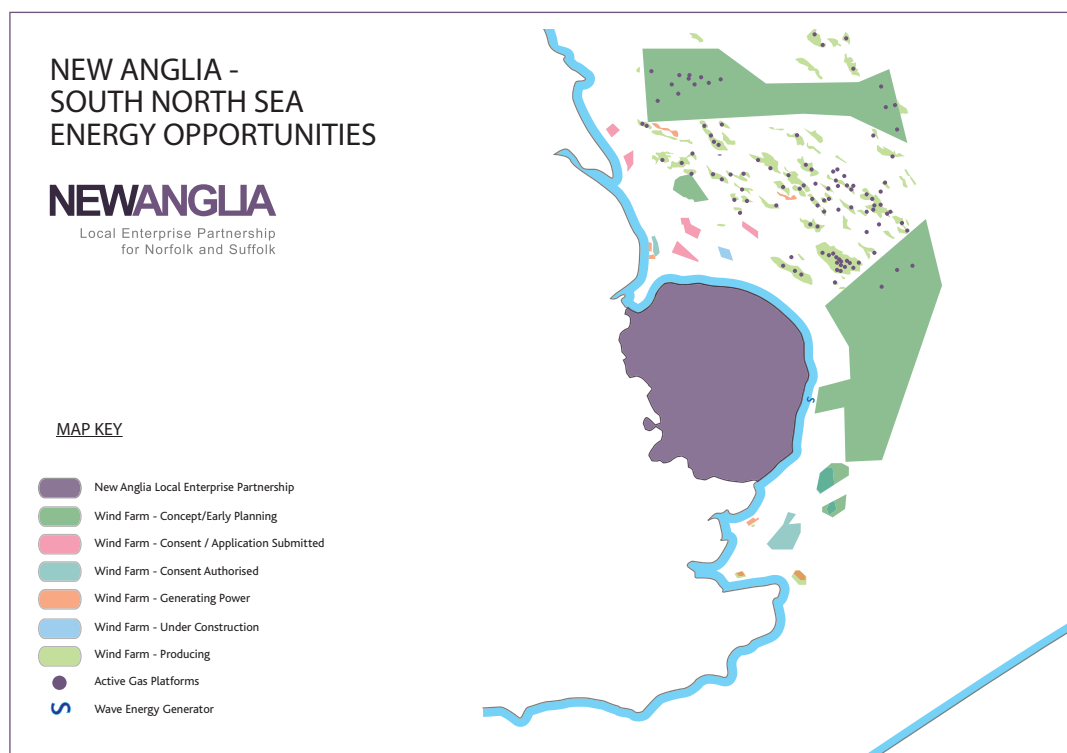


## Introduction/Economic Geography

- 2.24** Taking a definition of the sector, using standard industrial classifications (SIC), the sector has substantial business turnover of £2.9bn. SIC codes have included proportions of key sectors that contain energy employment (though not all of those in the supply chain which is very diverse). The industry representatives do not like using SIC definitions for the sector given they are so 'blunt' so the figures should be treated with caution. It has a high GVA per employee at £128,913. The sector is worth £994 million to the East Anglian economy. EEEGR (East of England Energy Group) estimates the sector accounts for a significantly higher number of employees (18,850) and OrbisEnergy holds a database with 1,688 potential companies engaged in the sector.
- 2.25** The energy industry across Norfolk, Suffolk, Cambridgeshire, Essex, Bedfordshire and Hertfordshire is witnessing rapidly developing technologies in renewable and low carbon sectors coupled with major investment in offshore wind and civil nuclear power generation (see maps). Norfolk and Suffolk is at the centre of the world's largest market for offshore wind energy and the UK's most dense offshore development. Great Yarmouth and Lowestoft are the closest ports to the 1200-1800 turbine East Anglia Array wind farm, 25km off the coast. Nuclear power is witnessing substantial investment too with the



decommissioning and new power stations proposed at Sizewell in Suffolk. This will result in significant employment prospects in construction, engineering and maintenance and 900 jobs once operational. Sizewell C will supply 6% of the nation's electricity and generate enough power for 5 million homes.



- 2.26** The Government highlights the need to maximise UK oil and gas reserves and have secure energy supply chains for UK imports. The Southern North Sea gas reserves place Norfolk and Suffolk well (See map). Bacton Terminal on the North Norfolk coast processes around half the UK's natural gas. It offers significant potential to act as a European hub for the large-scale storage of gas and captured carbon (CCS) from a new generation of coal and gas-fired power stations. Norfolk and Suffolk has offshore, marine, and subsea engineering, drilling technology and offshore decommissioning capabilities. The local supply chain has over 40 years expertise of oil & gas, nuclear, bio-energy and wind power. It is exploring prospects within 'new or early stage' subsectors such as CCS, gas storage, biomass energy, fuel cell technology and biofuels. The decommissioning of offshore gas platform is a major growing business opportunity too. The companies that installed, operated and maintained gas platforms and pipelines are now turning to the fast new markets of off shore wind and wave and nuclear clean-up and new build. The area has to position itself to capitalise on this growth whilst ensuring a sustainable, prosperous future based on secure and balanced energy supplies, transmission and distribution. This is very much within the grain of New Anglia's Green Economy Pathfinder (GEP) status as an exemplar LEP and global centre for low carbon industries.



## Assets and Priorities

- 2.27** In addition to the GEP, Lowestoft and Great Yarmouth has Enterprise Zone status and New Anglia is recognised as one of six 'Centres of Renewable Engineering' (CORE). The area also has the East of England Energy Group (the industry association for energy) and important incubation and innovation hubs including OrbisEnergy (offshore wind, wave and tidal), and Beacon Innovation Centre (oil & gas, and offshore engineering). Beacon Innovation Centre was built in 2002 after a major public/private report highlighted the need for such an innovation/incubation centre focussed on the energy sector and sited between the two clusters of Great Yarmouth and Lowestoft. It has successfully supported businesses and its most recent success stories include Fraser Offshore, 3Sun/Dawson Energy and Seajacks.
- 2.28** In Lowestoft, OrbisEnergy was built by the public sector to support the growing offshore renewables sector. It is now an international hub for supply chain development, and has attracted major offshore wind developers into the region including Scottish Power Renewables, Vattenfall and SSE Renewables. OrbisEnergy itself is a flagship facility in an area of Lowestoft that is being developed as an offshore technology park. Once fully developed, the 15-hectare site will play home to a significant proportion of the supply chain for offshore technologies such as offshore wind, allowing for manufacturing and fabrication, business incubation and skills training. Both these major centres are key drivers for the Centre of Offshore Renewable Engineering and Enterprise Zone status and will act as feeders for incubating companies that will grow and expand into the EZ areas, acting as soft-landing pad for inward investment and a catalyst for the supply chain.
- 2.29** Nowhere in the UK has a broader energy mix or provides as much business potential as Norfolk and Suffolk. That said, this globally competitive sector requires LEP and sector support at the highest level. Local companies need to be made aware of, and able to plan for, the immediate growth around off-shore wind, oil and gas and nuclear facilities. This scale of investment involves building on existing capabilities, diversification and inward investment. The industry also urgently requires the provision of a skilled workforce to meet its changing needs. The Skills for Energy programme is addressing these issues but requires ongoing support and resources to deliver effectively.
- 2.30** Norfolk and Suffolk can provide a competitive international business location with many global energy players, world-leading R&D hubs, top tier universities and high-value skilled engineering centres. That said, it cannot match the broadband capacity of other areas and, although it has CORE and EZ status like some of its competitors, it is not an assisted area. The Norfolk and Suffolk Energy Alliance<sup>4</sup> note existing businesses have extensive capabilities to support the sector's growth and deliver diverse energy related contract opportunities. They include the engineering disciplines mentioned earlier, companies producing energy related products & services and air, land and sea logistics operations. Supply chain companies are providing services, equipment and materials used in the manufacturing, engineering, construction and operation of energy related projects. Businesses such as catering companies and hotels are able to offer support services too.

<sup>4</sup> Norfolk and Suffolk Energy Alliance: A public/private partnership between Norfolk and Suffolk CC's, GYBC, WDC, NNDC, EEEGR and CofC.

## Scale of Opportunity

- 2.31** The two counties account for £2.9 billion of turnover per annum in the Energy Supply Chain. The area has an energy business worth billions and some £30.8 billion investment is anticipated in major projects over £10m within five years.

## Challenges

- 2.32** Much of the sector's labour force is due to retire and programmes are required to develop a new generation of skilled and qualified workers. This is potentially the most serious obstacle to support the sector's fast resurgence. This will require a joint approach to meet training needs in a coherent way. The Norfolk and Suffolk Energy Alliance cites several barriers to supply chain development. These include utility/distribution and transport capacity, high speed broadband and transport infrastructure. There is a need to provide serviced land and speculative units to accommodate new business opportunities from energy companies. Without suitable sites and premises (serviced and not just allocated) Norfolk and Suffolk could be constrained. Other issues cited include planning permission for low carbon energy projects (outside the EZ), improved public awareness/understanding and R&D support. Given the scale of national and international competition it is important to have a detailed knowledge and understanding of engineering and manufacturing capabilities, assets and resources. This can be used to promote the sector and attract inward investment. More open procurement would also help to ensure local companies are aware of emerging opportunities (this is especially important for local SMEs). A key challenge is how the NALEP and EEEGR engage with an industry that is largely foreign owned and where decisions are taken remotely. Pivotal to this the requirement for a clear, definitive and unambiguous energy policy, including the supporting financial regime to give the sector the certainty to invest.

## Key Actions

- 2.33** New Anglia will support the sector's on-going development backing (1) its Pathfinder, EZ and CORE status and (2) the offshore wind supply chain, the substantial investment at Sizewell and development and production from the southern North Sea gas fields (and decommissioning activity). It will encourage the work of those organisations and networks working on behalf of local companies like the East of England Energy Group (EEEGR), maintaining a robust supply chain, diversifying and supporting skills development. A coordinated message is required to ensure local involvement in new opportunities and promote strategic relationships.
- 2.34** The sector groups wish to support the private sector to make the energy opportunities happen, promote investor development work and influence and secure second and third tier suppliers. There is an urgent need to address skills requirements supporting recruitment, providing intelligence and developing measures to meet employer demands. For this reason the EEEGR's EPIS Centre project (Energy Production Innovation Skills Centre) Project has been developed, which aims to be a centre of excellence for energy skills training in the East of England. The sector's capabilities need profiling and there is a need to stimulate supply chain improvement, and promote diversification and the acceleration of energy technologies.

## FOOD, DRINK & AGRICULTURE

Employment (2010)	81,297
Growth in Employment (2008 – 2010)	-2,477 (-3%)
Number of Businesses (2010)	7,845
Growth in Business Base (2008 – 2010)	-898 (-10.3%)
GVA (2010)	£2.2bn
GVA per employee (2010)	£27,433
Business Turnover (2010)	£9.8bn

### Introduction/Economic Geography

- 2.35** Food, drink and agriculture are the largest employment sectors across the Norfolk and Suffolk area, accounting for over 81,000 jobs and 12.7% of total employment in the LEP area. The most significant employment subsector within food & farming is that of food retail, which accounts for nearly 33,000 jobs. Agriculture and food processing are also large employment subsectors. Overall, the sector contributes over £2bn to GVA, equivalent to 9.7% of total GVA. GVA fell by £200m between 2008 and 2010, a decline of just over 8%. The sector also experienced a 3% decline in employment between 2008 and 2010 equating to a loss of 2,477 jobs overall and a more dramatic decline than the overall national experience. Losses in food processing and catering were severe at 15.5%. By contrast, food wholesale employment rose by 14.5%.
- 2.36** From a New Anglia perspective, food and drink is represented in all districts, although the scale and level of importance does vary from place to place. The sector comprises of two distinct groups: large scale processing companies and niche, local food and drink producers. Pig and poultry farming, brewing and niche ingredients production are also in evidence right across the area. The area has a growing reputation for its excellent food and drink festivals and the quality of the local food offer at other cultural events across both counties.
- 2.37** Agriculture is integral to the production of food and drink and forms the basis for the development of many of the area's successful local food and drink brands. Almost half of the agricultural land in Norfolk and Suffolk is utilised for cereal crop farming, mostly wheat but also winter and spring barley. However in value terms more intensive crops include 20% of the UK's potatoes, 50% of its sugar beet and 20% of its vegetables coming from the two counties. Interest is growing in the production of crops for renewable energy (e.g. biomass), as is the potential for including agri-business as part of the area's tourism offer.

### Assets and priorities

- 2.38** Clearly, the scale and depth of the food, drink and agriculture sector is a tremendous asset to Norfolk and Suffolk. Its strong relationship with the tourism sector in particular is an important factor in determining how both of those sectors will grow in the short term. Sector priorities are being shaped by the Food, Farming & Rural Economy Board (FFREB) who are focusing on four key drivers of growth: skills, training and people development; local food and tourism; resource supply and efficiency; and addressing red tape and growth conditions.

- 2.39** The sector benefits from world-class research facilities at the Norwich Research Park such as the John Innes Centre/Sainsbury Laboratory and Institute of Food Research. The recently established Centre for Contemporary Agriculture (CCA) will promote and exploit the work of all the area's specialist research institutions and develop new undergraduate, postgraduate and short courses. On the education and training side, the sector has a strong asset in Easton and Otley Colleges, who merged in support of this important growth sector.
- 2.40** Plans are underway to set up Norfolk and Suffolk Food Hubs. The creation of these networks offers a significant opportunity for members to grow indigenous business by: generating ideas for new markets; developing local supply chains; sharing facilities; and applying environmental technologies to business operations to help reduce waste and energy use.

### Scale of opportunity

- 2.41** Exploiting links to other growth sectors offers good scope to grow the sector - integrating tourism promotion with the area's food and drink specialisms being a notable example. Energy, biotechnology and advanced manufacturing also offer up interesting connections with the sector. There is potential to attract more R&D through the new Centre for Contemporary Agriculture and its associates, particularly in relation to the linkages between food, drink and agriculture and the other sectors mentioned above.
- 2.42** Helping local producers to compete and/or develop alternative markets is paramount to achieving sustainable growth. The Food Hub model has this at its core and there are calls to begin commercial operations of the Food Hubs as soon as possible. Producers need to consider options for expanding local reach (e.g. through food festivals and other events), moving into new domestic or international territory (through more proactive promotion at food fayres), or diversifying their products for alternative uses (e.g. crops for bio fuel production).

### Challenges

- 2.43** The FFREB has made good inroads into identifying the challenges impacting on sector growth and has started to take action to address these. Top of the list is tackling skill shortages, overcoming negative perceptions and reducing reliance on migrant labour to fill gaps. Resources and infrastructure are also important. Agricultural areas can be disproportionately affected by infrastructure restraints such as slow broadband speed and poor road connections. Food, drink and agriculture are also challenged by a list of additional barriers such as: restraints on the use of water; energy supply issues; managing waste; threat of crop disease; high fuel and distribution costs; and increases in regulation (such as planning and highways). Promotion of suitable locations across the region to attract supply chain companies will also impact on growth as will improving access to business support services and overcoming 'red tape' issues.

### Key areas for action

- 2.44** New Anglia will support sector growth by promoting location benefits and the area's centre of research excellence to help target new markets and inward investment opportunities. Exploiting links with other growth sectors and addressing infrastructure deficits are also key actions. The sector will continue its focus on the FFREB's identified growth priorities, make progress on the Food Hubs and co-ordinate promotional initiatives, including joint activities with tourism.

## INFORMATION AND COMMUNICATIONS TECHNOLOGY

Employment (2010)	10,307
Growth in Employment (2008 – 2010)	-1,772 (-14.7%)
Number of Businesses (2010)	1,424
Growth in Business Base (2008 – 2010)	-46 (-3.1%)
GVA (2010)	£1.3bn
GVA per employee (2010)	£130,711
Business Turnover (2010)	£2.5bn

### Introduction/Economic Geography

- 2.45** Information and communications technology (ICT) plays an important role in the Norfolk and Suffolk economies, encompassing a wide range of businesses and a diverse set of technological tools and resources. It is an economic sector in its own right and as an enabler/driver of other economic activities across the area.
- 2.46** As an enabler there are strong links between ICT and many other sectors. In particular there are important economic connections between the sector and the creative and cultural, financial services, energy and health and life sciences sectors.
- 2.47** The ICT sector in Norfolk and Suffolk employs 10,307 people and represents 1.6% of total employment in the area, less than the England and East of England rates. Telecommunications and IT are the biggest sub-sectors with software development and publishing also significant. The majority of employment in the sector is concentrated in Suffolk. Combined, the area is home to just over 1400 ICT businesses or 2.6% of the total business base. 70% of these businesses are in the IT sub-sector.
- 2.48** The sector was hit hard by the downturn, with employment dropping by 14.7%, significantly worse than the national picture. The business base fell by 3.1% during the same period, with most of the losses occurring in Suffolk.
- 2.49** ICT contributes £1.3 billion to the local economy and has a high GVA per worker ratio. Telecommunications is the single biggest contributor to GVA accounting for 60% of the total.

### Assets and priorities

ICT contributes £1.3bn to the local economy and has a high GVA per worker ratio.

- 2.50** Adastral Park is also the home to Innovation Martlesham, an initiative to bring ICT related companies to the Park. Innovation Martlesham aims to transform BT's research and development operation at Adastral Park into an open innovation park and offering networking, co-location and incubation opportunities.
- 2.51** The sector is less prevalent in Norfolk but there are many large businesses in Norfolk that 'use' ICT and have a strong interest in how this sector develops; in many ways they are pushing the technological boundaries of ICT in their 'business as usual' activities. The Norwich Research Park, which majors in food, health and environmental science, has substantial data handling and management requirements.
- 2.52** Nearby, the 'Cambridge Technopole' is a geographic area of intense high-technology innovation activity encompassing the City of Cambridge and the sub-regional Greater Cambridge hinterland of approximately 25 miles radius. Forest Heath and St Edmundsbury districts both sit within the Greater Cambridge sub-region, enabling Suffolk to benefit from the growth in high-technology innovation in this area.
- 2.53** The ICT sector has important links to other sectors. In one respect, all businesses now rely on internet access and/or bespoke software to remain competitive, but, in New Anglia, there are very specific links to businesses in the creative industries, energy, financial services and health and life sciences sectors.

### Scale of opportunity

- 2.54** The ICT sector is expected to be one of fastest growing sectors in the UK. It is predicted that there will be 163,000 more UK jobs in this sector by 2016<sup>4</sup>. In Norfolk, research by YTKO has shown a nascent and growing ICT digital cluster, which has the potential to grow rapidly in specific sub-sectors such as affiliate marketing and other digital media activities.
- 2.55** BT is proposing to expand Adastral Park and has submitted an outline planning application for the regeneration of the Park and surrounding land. The proposals aim to deliver fit for purpose research and development facilities and a leading supply chain location to ensure Adastral Park can maintain its position as a world-leading centre of excellence in technology and innovation. There is also scope to develop closer links between the Park and the UCS Enterprise Hub. It is expected that BT and new firms locating at the expanded site could create 2,000 new jobs.
- 2.56** The Norwich Research Park is anticipated to grow substantially in the next 5 years as new development plans come to fruition. Part of this growth will involve new start up ICT companies, seeking to collaborate with the significant body of science on the NRP that is increasingly demanding specialist ICT skills and technology.
- 2.57** The anticipated investment in broadband infrastructure across both Norfolk and Suffolk will create new business opportunities and there may also be new opportunities associated with the government backed Technology Innovation Centres (TICs).

<sup>4</sup> Research Insight Report, 2008

- 2.58** An interesting concept is the notion of promoting 'Smart Anglia'. This initiative will exploit the growth in use of smart phones, sensors cloud computing and broadband – and identify new opportunities for applying these ICT technologies to create more sustainable communities.

### Challenges

- 2.59** One of the key issues facing companies across Norfolk and Suffolk is access to high speed (next generation access) broadband. This is especially important for the ICT sector, most notably for digital technology companies, but impacts on all businesses and their ability to carry out day-to-day operations.
- 2.60** Access to a skilled workforce of sufficient scale and quality is also an area of concern and there is a perception that the quality of ICT teaching in UK schools is lacking, particularly when compared to overseas. Research for the Council of Professors and Heads of Computing (CPHC) predicts a future skills shortage in the sector in the UK, while emerging nations are producing large number of highly skilled ICT graduates. ICT employers complain of the lack of UK-based people with the skills or aptitude to make a career in their businesses. This is particularly apparent at postgraduate level. However, despite national research, The School of Computing at UEA is one of the top computing science departments in the UK. In the 2011 National Student Survey it was ranked joint 8th out of all the universities and institutions in England offering computing science courses. For research, in the 2008 Research Assessment Exercise (RAE), reported that 75% of research activity was rated as internationally recognised or excellent and 20% rated as world-leading.

### Key areas for action

- 2.61** New Anglia will support the on-going growth and development of the ICT sector by: promoting the development of Adastral Park and the Innovation Martlesham cluster as a centre for innovation, research and inward investment for ICT and related businesses; making the case for ongoing investment in superfast broadband for Norfolk and Suffolk; working with local authorities to campaign for improvement in ICT education; and investigating new opportunities for flagship programmes related to future opportunities such as those associated with Technology Innovation Centres, sustainable development and the Smart Anglia initiative to support the green economy.
- 2.62** As a sector, ICT businesses should: encourage the expansion of existing business networks, increasing membership across Norfolk and Suffolk and promoting the sharing and adoption of best practices; support the development of local supply chains and build a better understanding of the wider company base; exploit the synergies and potential for innovation resulting from large numbers of non ICT businesses who are users of technologies and drivers of new business models; and draw together business and partners to support the government in changing the way ICT is taught in schools and universities.



## FINANCIAL SERVICES

Employment (2010)	20,828
Growth in Employment (2008 – 2010)	-5,247 (-20.1%)
Number of Businesses (2010)	792
Growth in Business Base (2008 – 2010)	-23 (-2.8%)
GVA (2010)	£3.1bn
GVA per employee (2010)	£148,364
Business Turnover (2010)	£7.5bn

### Introduction/Economic Geography

- 2.63** Financial Services are significant to Norfolk and Suffolk. The sector makes the largest contribution to GVA of £3.1bn or 13.4% of total GVA. Financial and Insurance Services employ almost 21,000 people in the area representing 3.2% of total employment. The sector has been seriously affected by the downturn however; it suffered the largest absolute decline in employment between 2008-10 losing over 5000 jobs, a drop of 20%. GVA also halved over the same timescale.
- 2.64** That said, the sector is well established with over 200 years of history and two distinct, globally competitive hubs based in Norwich and Ipswich with additional strengths across the counties. These factors have helped the sector to weather the storm – the strong feeling is the sector is stable, competitive and will remain so over the next 2-3 years.
- 2.65** The two 'hubs' of activity, in Norwich and Ipswich are both acknowledged as leading centres in the UK finance and insurance services market, with Norwich the largest general insurance centre in the UK, with support functions and supply chain companies located throughout the Greater Norwich area. Norwich is home to several large companies including Aviva (previously Norwich Union), Marsh, Virgin Money, Royal Bank of Scotland, Central Trust Capital and Swiss Re. Ipswich is home to a smaller element of the sector, but is nonetheless important to the local economy. Ipswich is the location for insurance firms AXA and Willis, both employing in excess of 1000 people as well as Legal and General, Swinton Insurance, Aviva and several high street banks. There are notable employers in Kings Lynn (Adrian Flux), Great Yarmouth (BNP Paribas) and other districts such as Forest Heath where there are aspirations to growth the insurance sector. Small and medium sized businesses are thriving, particularly in the Greater Norwich area, and are growing niche, innovative, technology driven enterprises in support of the wider sector.

### Assets and priorities

- 2.66** Norfolk and Suffolk present an attractive proposition to win new financial service and insurance business to the locale. It's an attractive place, offering an excellent quality of life, a committed and skilled workforce, low cost base (both for land and wages) and is close to the capital.



- 2.67** The small enterprise landscape is healthy with an increasing number of new small and micro businesses appearing in financial and related services, particularly in the creative and ICT sectors, some set up by former financial services employees. This entrepreneurial outlook seems to be typical of the sector; the workforce is highly skilled, experienced, adaptable and able to spot new opportunities using that knowledge and experience to create innovative new products and services to support the larger operations.
- 2.68** The Financial Industries Group (FIG), a non-profit making organisation with public private sector membership, co-ordinates and supports the sector in Norfolk. FIG has been working with the UKTI Regional Forum to raise the profile of the region internationally (e.g. through foreign embassies) as a location for financial and insurance services. The aim is to win mobile investment from London and beyond, recognising this opportunity may only exist for a short time as companies implement their plans for recovery from the downturn.
- 2.69** FIG has also been instrumental in moving the skills agenda forward in Norfolk. Skills, training and education have been an issue historically with gaps in local provision and companies regularly having to send staff to training courses in London. Working with the sector and City College, Norwich, FIG helped to co-ordinate new provision of specialist qualifications and the UK's first foundation degree in Financial Services. This provision subsequently attracted COVE status for the college. Just as significant was the success in bringing the £5m National Skills Academy for Financial Services to Norwich. Initially one of only four in the country, the multi-purpose facility also provides conference facilities and CPD courses for the industry.

### Scale of opportunity

- 2.70** Growth is not expected over the next 12-24 months. Maintaining competitiveness is the primary goal using technological innovation and attracting mobile investment opportunities from home and overseas. Whilst overall employment is expected to remain static, there will be shifts in employment levels in different sub-sectors. Larger companies are in consolidation mode, driven by cost saving directives from HQs. In contrast, SMEs are expected to continue growing and developing niche, technology driven specialisms around the sector. Helping that supply base to grow and innovate should be the focus for LEP, local authority, education and business attention. Keeping pace with the skills needed to drive technological change is key to make sure local provision is available and fit for purpose.
- 2.71** The growth in small and medium sized enterprises in the supply chain is significant, particularly as this activity cuts across other sectors. The use of technology and 'e-enablement' platforms for call centres and mobile phone applications is just one example of this; 'old' meets 'new' with the application of creative, digital and ICT excellence to the established strength of financial services. Technological developments will continue to drive this element of the sector, particularly around customer engagement, online interfaces and mobile phone enabled payment methods. It is clear there is a strong correlation between the creative, ICT, digital sectors and future developments for financial services.
- 2.72** Encouragingly, the sector is coping and finding ways to adapt to change without too much intervention. This leaves scope to play to the sector's strengths, ramping up the promotional efforts of the LEP, business and public sector partners combined to market the region as a great location for the sector.

- 2.73** Finally, there is a chance to consider the merits or otherwise of establishing a sector networking and co-ordination function for Suffolk. This could be along the lines of the successful FIG model operating in Norfolk, but ultimately, it is for the sector itself to decide the best way to handle this. There is an appetite to do something; whether this ends up as a standalone 'organisation' for Suffolk or extension of FIG will depend on business views and resources. Whatever is decided, there are clear benefits to having a co-ordinated approach to promotion and not missing the boat on attracting new businesses. New Anglia can play a role in reinforcing this message as part of its overall sector growth strategy.

## Challenges

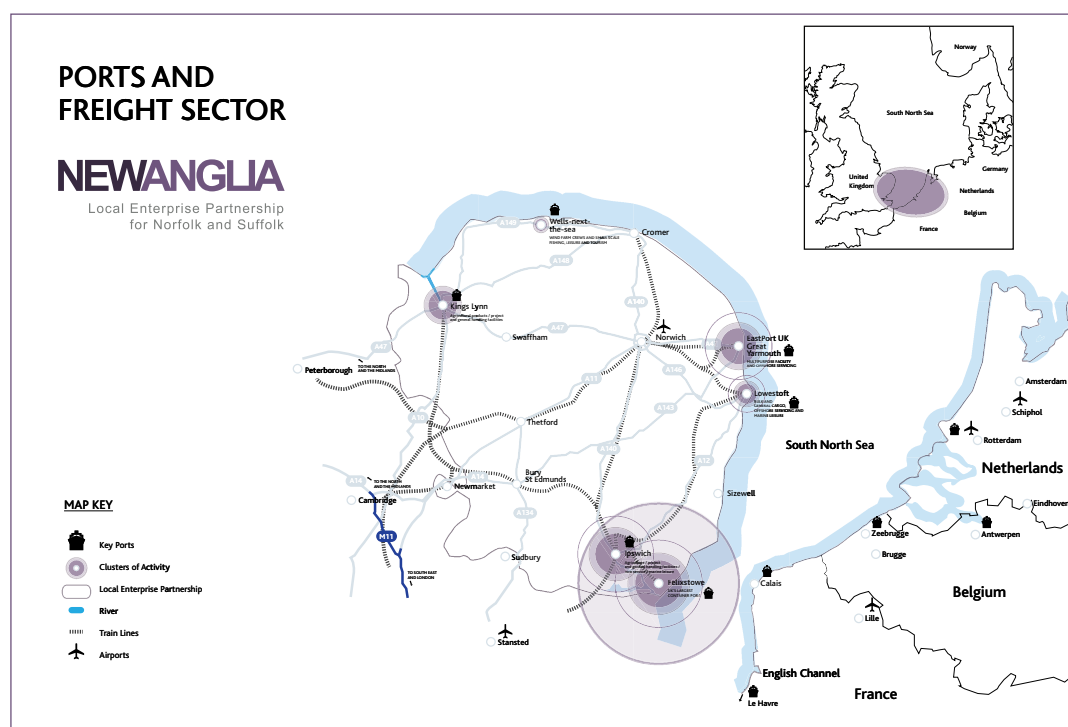
- 2.74** The stability and resilience of the sector is clear and bodes well for maintaining its competitiveness in both the urban hubs and surrounding areas. That said, there are concerns to be mindful of. Some of these issues are common across all sectors, such as deficiencies in superfast broadband, poor road and rail access into and around the region and the potential lure of London or Cambridge to young people in particular. Land availability is less of an issue, although it is noted that Ipswich has a shortage of employment land in the heart of the city to accommodate substantial expansion of the sector.
- 2.75** Specific sector concerns cover a range of issues. The sector is heavily regulated – and the rate of regulatory change has increased dramatically in recent times. Regulation changes can have a disproportionate impact on smaller businesses, leaving them potentially vulnerable. There is a heavy burden on financial advisers to gain more qualifications. An ageing workforce in this sub-sector could leave a gap in terms of local, personalised services and result in a shift towards larger companies taking a larger share of this market.

## Key areas for action

- 2.76** New Anglia will support sector growth by promoting the location benefits and sector strengths to target specific markets/companies for inward investment. They should encourage the development of new skills and qualifications, particularly around the creation and use of new 'enabling' technologies. Making the case for ongoing investment in infrastructure is also important, accelerating delivery of superfast broadband, road and rail links.
- 2.77** The sectors should consider the options and potential benefits of establishing a networking/co-ordination body for the whole area, working with the Norfolk FIG to develop a Suffolk model or extending the geographical coverage of FIG to incorporate Suffolk businesses. Whichever option is taken, the sector should agree and deliver a strategy for promotional activity including target markets for inward investment. Exploiting links and opportunities with other sectors, particularly those in ICT, creative and digital industries should also be pursued.

## PORTS AND LOGISTICS

Employment (2010)	23,521
Growth in Employment (2008 – 2010)	907 (+4%)
Number of Businesses (2010)	1,695
Growth in Business Base (2008 – 2010)	-30 (-1.8%)
GVA (2010)	£1.3bn
GVA per employee (2010)	£55,695
Business Turnover (2010)	£5.4bn



### Introduction/Economic Geography

- 2.78** The sector has some 1696 companies in Norfolk and Suffolk (2010). The ports have an estimated business turnover of £5.4 billion and showed an increase in employment between 2008 and 2010 (of 4%) when many other sectors declined. They employ some 23,521 people (2010). Employment is anticipated to grow by 4.2% over the next 3 years. The East of England ports are more productive, in terms of use of labour per tonne handled, than the other major UK ports (EEDA Ports Study (2011)). The sector is worth £1.3 billion to the East Anglian economy.
- 2.79** The UK's ports and their associated activities provide gateways for UK trade and travel and play a pivotal role in the energy sector. Certain ports play a major role in national trade, others cater for local or niche sectors (offshore). Norfolk and Suffolk's long coastline combined with investment at Felixstowe and in on and offshore energy, offer substantial employment opportunities. It has: the UK's largest gas landfall; new nuclear capacity at Sizewell C; and continuing North Sea oil and gas exploration, extraction and eventually decommissioning.

- 2.80** The sector comprises of road and water freight and transport services, cargo storage and warehousing. It has a large proportion of full-time, male employees in operative trades: drivers, loaders, dock workers and logistics personnel. The northern Haven Gateway ports include Felixstowe and Ipswich and further north Lowestoft and Great Yarmouth (see map). They generate substantial freight activity along road/rail corridors to UK hubs. The ports are closely linked to other sectors including (1) energy products and offshore installation and maintenance (2) agricultural goods and supermarkets port-based logistics operations (3) business and professional services from accountancy to transport engineering (4) tourism, marine and coastal leisure activities including: marina developments; tourism from business (international energy companies); and cruise and ferry passengers.

### **Assets and Priorities**

- 2.81** Norfolk and Suffolk have several diverse ports including some of the UK's major facilities (see map). Felixstowe, the UK's largest container port, is on the premier Asia/EU route dedicated to unitised deep sea traffic. It is the only UK port to accommodate the largest container ships and aspires to EU hub status. Lowestoft offers a wide range of servicing facilities for the North Sea offshore oil and gas and wind farms and extensive marine leisure facilities. Ipswich Port, the largest UK agricultural exporter, offers roll-on/roll-off capabilities, potential renewable/ offshore facilities, rail connections and marine leisure facilities.
- 2.82** EastPort UK, Great Yarmouth is a modern multipurpose facility consisting of a deep water outer harbour and a river port servicing offshore wind and oil and gas. King's Lynn is a regional hub for agricultural products offering extensive handling and storage facilities. A series of smaller ports includes Wells, servicing wind farm workers and coastal harbours serving smaller vessels and supporting fishing, leisure and tourism. Harwich, just outside the LEP area, is the third UK busiest for cruise traffic (and growing) and has also been utilised for offshore wind.

### **Scale of Opportunity**

- 2.83** The substantial opportunities need to be balanced against the competition for traffic in a market with continued downward cost pressures. The offshore wind sector will increase logistics and supply chain operations. The Great Yarmouth and Lowestoft Enterprise Zone (EZ) offers a major base of offshore wind activity as well as oil, gas and nuclear (Sizewell). It aspires to 10,000 new jobs and 180 new businesses and the area is also one of five regions given Centre for Offshore Renewable Engineering (CORE) status. There is scope for further development of quayside activities. Development options at Felixstowe could create 1-2000 jobs and include: major distribution/mail order fulfilment centres and/or postponed manufacturing<sup>5</sup>. There is scope to follow the European model by extending the ports' hinterland through port-centric logistics, reducing costs and bringing green benefits.

## Challenges

- 2.84** The ports face serious competition from Rotterdam, EU ports facing the Far East and the New London Gateway Port. There are some requirements for serviced and fit for purpose land/premises and some ports require expensive quay head investment. Local authorities need to balance growth with the impact of freight movements and retain added value and higher density employment. Port operators favour streamlined planning and certainty. There is also some pressure for residential accommodation on waterfronts. Whilst the ports are responsible for developing their own infrastructure there is a role for the LEP in responding to/highlighting constraints experienced. The Local Economic Assessments point to the need for major investment on the trunk road network, river crossings and in vehicle management. There is demand for more lorry parking space/improved associated facilities and rail investment. The cost of "shunts" from quaysides to storage / distribution centres has become more expensive (exacerbated by fuel costs), and less attractive to importers.

## Key Actions

- 2.85** New Anglia will support the sector's growth by: Promoting (a) The EZ and CORE status (b) European hub status for Felixstowe (c) Tourism from cruise/ferry passenger traffic growth (Harwich) (d) Servicing facilities for Sizewell; Ensuring sufficient suitable serviced employment land balancing streamlined planning against growth impacts; and Securing sustainable key road/rail corridor enhancements. The Norfolk and Suffolk key Ports met as a sector group and will continue to meet as necessary. They wish to be known as the Ports and Freight group and want to: (1) Promote the 'South North Sea's' combined strengths offsetting the competition (2) Update economic intelligence (3) Promote the employment opportunities, collate labour market evidence and improve its image enhancing employers/education links.

<sup>5</sup> Delay of final activities (assembly, production, packaging) until the latest possible time.

## TOURISM

Employment (2010)	67,697
Growth in Employment (2008 – 2010)	807 (+1.2%)
Number of Businesses (2010)	5,444
Growth in Business Base (2008 – 2010)	-398 (-6.8%)
GVA (2010)	£1.3bn
GVA per employee (2010)	£19,013
Business Turnover (2010)	£5.4bn

### Introduction/Economic Geography

- 2.86** Tourism accounts for around 10.5% of total employment in Norfolk and Suffolk with 67,697 jobs in all. Employment has remained healthy over the downturn with a slight increase of 1.2% between 2008 and 2010. This is especially positive when compared with employment in the East of England and England as a whole – which both suffered falls in employment over the same period. The industry is worth £1.3bn to the New Anglia economy representing 1.4% of the area's total GVA.
- 2.87** Identified as one of the top two growth sectors in the New Anglia Business Plan, it is felt tourism has the ability to respond rapidly to market stimulation and also contribute to putting the area on the map as a significant economic entity and a great place to live, work, invest and play.

### Assets and priorities

- 2.88** Norfolk and Suffolk have rich and diverse tourism offers including the heritage coast, attractive villages and market towns, and large areas of attractive countryside, The Broads, Brecks and Fens, and Areas of Outstanding Natural Beauty. Both counties have a large number of traditional and small seaside resorts (such as Southwold, Great Yarmouth, Hunstanton, Cromer and Sheringham) as well as centres of historic, retail and cultural assets (Norwich, Kings Lynn and Ipswich), with Norwich ranked 6th in the UK for day visitors. The area is also home to significant tourism assets such as Newmarket (for horse racing), Forest Heath (including Centre Parcs) and is home to a growing number of internationally recognised performing arts, music, food and drink festivals (such as Latitude, Aldeburgh and the Norwich & Norfolk Festival). Suffolk is gaining a reputation as Constable and Gainsborough 'county.'
- 2.89** New Anglia is already prioritising some key actions for tourism including co-ordinated marketing and advertising; simplification of the delivery landscape; and marketing the area's iconic tourist, cultural and retail destinations.

### Scale of opportunity

- 2.90** The biggest opportunity for growth in terms of employment numbers is through the creation of new, large visitor attractions, especially those with year round appeal such as Snoasis. The LEP and local authorities need to make sure opportunities like this are progressed as quickly as possible or risk losing them to other parts of the country.

- 2.91** Building on the success of day visits in the area is another growth opportunity. Attracting new first time visitors through targeted marketing to the domestic market (particularly from London, South East and neighbouring regions) is another growth priority, as is translating one day visits into repeat or extended stays. The one-off opportunities presented by events like the Olympics and the Britten Centenary in 2013 need to be grasped, particularly as a means of tapping into overseas markets.
- 2.92** The industry can be smarter about promotion. An effective example is the case of working directly with the Greater Anglia rail operator to offer discounts and special promotions to visitors travelling to the areas by rail. Linking such promotions to access several attractions across the region could help to encourage repeat or extended visits.
- 2.93** Exploiting links with other sectors, the wider 'green economy' and sustainable tourism, particularly food and drink, cultural events, festivals and speciality retail in market towns will add to the growth mix. Of course, this, along with all the other growth actions, relies on having strong co-ordination of marketing and promotional messages across all types of communication channels. The workforce needs to be skilled up to do this – and to be supported by New Anglia in getting the messages out. The industry itself needs to agree how best to organise this co-ordination effort, making up for at least some of the capacity that has been lost due to public sector funding cuts.

### Challenges

- 2.94** The diversity and geographic spread of the tourism sector is part of its appeal, but also brings significant challenges. The market is very fragmented which makes co-ordination and promotion of consistent marketing messages very difficult. Public sector support has been decimated in recent years, which has not helped these co-ordination efforts.
- 2.95** The sector's business base is dominated by micro-businesses and SMEs who have limited time for training. There is an acknowledged shortage of skills in leadership, management, marketing and customer services. Career opportunities within the tourism sector are often viewed as limited and more work needs to be done to highlight the opportunities for development beyond typical tourism related (and often seasonal) jobs.
- 2.96** The area has a heavy reliance on day visitors as opposed to overnight stays. Other locations also suffer from over crowding during the summer season. Locations such as Aldeburgh and Southwold have little spare capacity during the summer months, partly due to below average levels of accommodation in the county. Finding ways to even out the 'seasonality factor' is high on the agenda. Finally, there is a wide variance in the quality of accommodation across the area and a need to improve that quality to meet the increasing demands of visitors.

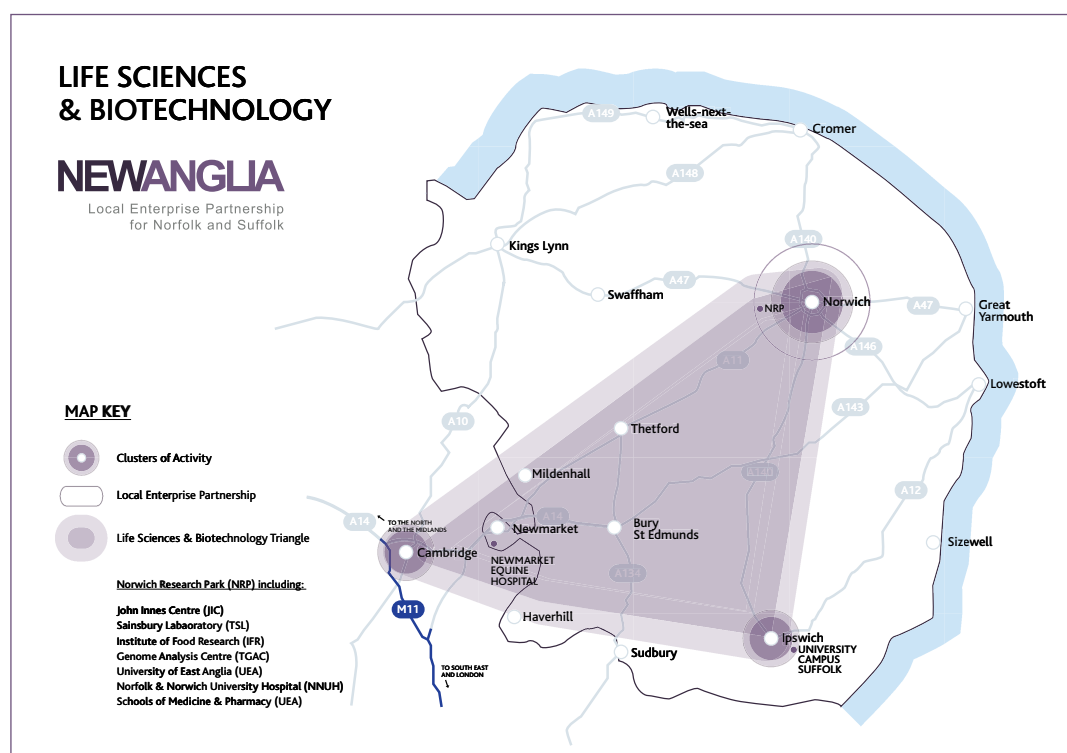
### Key areas for action

- 2.97** New Anglia will support sector growth by supporting better co-ordination of marketing and promotional activity, working with the sector and local authorities to bring new visitor attractions to the area and helping to exploit opportunities arising from major events like the Olympics and Britten Centenary. The sector should focus on developing a strategy for attracting new visitors and 'extended stay' visits to the area, co-ordinate an approach to 'smart promotion' and sustainable tourism and exploit the synergies with the food drink, cultural, creative and retail sectors.



## LIFE SCIENCES AND BIOTECHNOLOGY

Employment (2010)	1,081 (broader estimate 3000)
Growth in Employment (2008 – 2010)	-531 (-32.9%)
Number of Businesses (2010)	40
Growth in Business Base (2008 – 2010)	-4 (8.6%)
GVA (2010)	£132m
GVA per employee (2010)	£122,388
Business Turnover (2010)	£277m



### Introduction/Economic Geography

- 2.98** Life sciences and biotechnology have emerged as a world-class cluster for Norfolk and Suffolk. The region has developed some distinct research specialisms borne out of leading edge research facilities and expertise. Official statistics show 1000 employees and only 0.2% of the area's total employment. However, due to the way in which Sector Industry Codes (SIC) record employment within sectors, the figures do not fully reflect the actual number of people employed. The real value of the sector is far greater as the SIC codes do not include support and academic staff associated with research activities. For example, Norwich Research Park, located on the border between South Norfolk and Norwich, is Europe's largest single-site concentration of research into Health, Food and Environmental Sciences. The park employs over 2,400 scientists, with over 8,500 support staff, and has an annual research budget of over £100 million (Norwich Research Park website, November 2012).



- 2.99** The sector has taken a big hit in the last couple of years losing a third of its workforce. However, the world-class science base, high value jobs and commercialisation potential are still important to New Anglia, contributing £132m GVA and high levels of GVA per worker. This is also thought to be an underestimate – many of the jobs are hidden in the manufacturing of medical devices, engineering, higher education, chemicals and even charities. Based on local knowledge (the Genzyme Haverhill Operation alone employs 300 people) it is estimated the size of the sector to be at least around 3000. Norfolk has a significantly greater proportion of the LEP area's employment in the life sciences and biotechnology. The most significant concentration of sectoral employment is in Breckland district, which has 465 jobs in the sector.
- 2.100** Activity in this sector is clearly focused around three distinct points of a 'Life Sciences Triangle' located across LEP boundaries (see map) – in Norwich (Norwich Research Park), Ipswich (University Campus Suffolk) and Cambridge and containing important life science 'hubs' including those located in Newmarket (equine/bloodstock cluster), Mildenhall and Haverhill (high value bio manufacturing). In Norfolk, the cluster is located around the Norwich Research Park (NRP), one of Europe's largest single site concentrations of food, health and environmental scientists. Suffolk has developed a reputation for excellence in biotechnology and in particular regenerative medicine at UCS. This has happened relatively quickly; some aspects of cluster cohesion are at an early stage of development but already offer significant growth opportunities.
- 2.101** Pharmaceutical companies are also located in the area around King's Lynn (Bespac (inhaler manufacturers)) and Thetford including Baxter Healthcare and Suffolk benefits from the presence of big names in pharmaceuticals including the Genzyme Corporation based at Haverhill and Indian-owned Nestor Pharmaceuticals in Mildenhall. The area also hosts companies specialising in the associated advanced manufacture of coating systems, surgical instruments, medical packaging and other healthcare products.

### Assets and priorities

- 2.102** The Norwich Research Park is the location of a number of world class research, educational and training institutions including the John Innes Centre, Institute of Food Research, The Genome Analysis Centre, University of East Anglia, and Norfolk and Norwich University Hospital with their associated infrastructure and specialist facilities. Three of the Biotechnology and Biological Science Research Council eight strategic research institutes are located on the Norwich Research Park. Research, education and training activities on the Norwich Research Park are currently complemented by business support functions within the individual institutions and the facilities and services at the Norwich Innovation Centre and Norwich Bio-Incubator. In addition a new Enterprise Centre is planned to open in 2014. A big priority for the sector is the £26M expansion of the Norwich Research Park, with funding secured from the UK Government to build new infrastructure and secure new jobs in life science, health, and biotechnology disciplines.
- 2.103** Biotechnology is beginning to build a strong presence in Suffolk, building on the recently developed expertise in stem cell research and regenerative medicine at University Campus Suffolk (UCS) in Ipswich and the associated incubator space on site. Two new degree courses in regenerative medicine have been created at UCS and strong links forged with the hospital to build specialist capability. The wider components of the cluster are largely present across Suffolk, most notably in Mildenhall and Haverhill and comprising of

- 2.104** pharmaceuticals, laboratory reagents, high end packaging, medical devices, surgical instruments and cell therapy capability in the private sector and clinical, research and product development capability in the public sector. In Suffolk, bloodstock businesses are also included due to their role in high tech breeding techniques. This is especially relevant to the equine cluster located around Newmarket – a centre of excellence for animal medicine, research, bloodstock and other businesses associated with horse racing.
- 2.105** The sector's strong links with advanced manufacturing and the food and drink industry is another key strength.

### Scale of opportunity

- 2.106** Whilst it is starting from a relatively low base, and has suffered from significant job losses in recent times, the sector does offer up some positive opportunities for growth. The major expansion plans to promote commercial development of the NRP are paramount and could lead to the creation of up to 5000 new jobs over the next 15 years. The LEP, local authorities, businesses and academic institutions must work together to make sure the enabling infrastructure is put in place to support commercial development plans. Efforts should focus on speeding up commercialisation through provision of start-up facilities and support services for small businesses.
- 2.107** There are clear growth opportunities in other parts of the Life Sciences Triangle. Whilst it can be difficult to compete with the global reputation and brand of Cambridge in the life science field, it is clear that the more competitive cost base just over the county border is attractive to inward investment prospects. The 'overspill effect' of companies wanting the benefits of being close to Cambridge at competitive prices is a big selling point for Mildenhall and Haverhill. Defining and promoting the biotechnology opportunities in the equine industry at Newmarket will help to attract new businesses to that cluster. The new biotechnology research facility at UCS can be used as a catalyst to expand its research and product development capability through attracting in research and commercialisation funding to support NHS clinicians and UCS scientists and by creating opportunities to bring in overseas students to UCS. Building the skills capability will be key to achieving this. UCS has already created a spin out with angel funding via the Suffolk Investor Club.

### Challenges

- 2.108** It is clear that parts of the sector are more established than others and are growing (or have potential to grow) at different rates. There is no 'unifying force' for the region to agree priorities and a strategy for taking things forward. The formation of a sector group could be a useful asset to New Anglia. The group could take responsibility for agreeing the priorities for growth, developing a strategy, co-ordinating activity and championing the Life Sciences Triangle.

- 2.109** Concerns have been raised around diminishing funds for research. Public contributions are dwindling placing greater reliance on private investment. Whatever the source, investors can be reluctant to support high risk activities with potentially poor returns on investment. Lack of seed corn funding for research could delay the take up of opportunities for small business start up in Haverhill and Mildenhall. Whilst the new degree courses, research facilities and commercial spin out activities at UCS are a welcome development, the skills base in Suffolk will only support sector growth with continued effort to train 'in county' and to attract and retain skills internationally. Early evidence suggests that attracting internationally sourced skills to the County is entirely possible with both the NRP and UCS clear about their ambition to increase the number of Masters level and PhD students in biotechnology related subjects.
- 2.110** Speeding up and strengthening the commercialisation process presents some further challenges. Getting the enabling infrastructure and high calibre management in place at the NRP is fundamental to the commercialisation agenda; the planned expansion must not be beset by unnecessary delays or jobs and new investment may be jeopardised.

### **Key areas for action**

- 2.111** The LEP will aid sector growth by supporting, promoting and enabling the significant new opportunities at the expanded Norwich Research Park. Wider promotion of the Life Sciences Triangle as a research centre of excellence and employment location is critical with a focus on specialist employment hubs at Ipswich, Haverhill, Mildenhall and Newmarket, as well as identifying opportunities to bring in research funding and establishing an Angel Investor Network.
- 2.112** The sector should give serious consideration to setting up a Life Sciences & Biotechnology Sector Group to drive priorities and co-ordinate action, particularly around speeding up commercialisation rates and promoting the Life Sciences Triangle/key employment locations.

# 3

## SECTION C: ACHIEVING SECTOR GROWTH

- 3.1 This section sets out a number of common concerns that need to be addressed to achieve the level of sector growth the Board aspires to. Rather than supporting nine sector growth strategies in isolation there are two further considerations. The first is the development of two higher level themes to bind together sector activity ensuring their collective strengths are maximised. The second is the consideration of the many connections between sectors.
- 3.2 The three substantive components of this section of the strategy therefore comprise of:
- **Part A: Common Concerns:** These are the common concerns or cross cutting issues underpinning the Sector Growth Strategy that need to be addressed by the LEP and its partners. They include both critical success factors for sector development that will be addressed as well as the conditions for growth that will be supported. The key issues for each are summarised later in the table in this section.
  - **Part B: Higher Level Themes:** The Strategy is framed by two higher level themes: the green economy and the visitor economy. They have been designed to bind together key sectors and strands of activity and illuminate common growth objectives.
  - **Part C: Maximising Sector Connections.** Clearly sectors do not operate in silos. The final part of this section therefore illustrates some notable sector connections and their inter linkages. It includes a brief description of several sectors which cut across many industries. These include Financial Services, Advanced Manufacturing and Engineering and ICT. There are also a number of spatial corridors of growth and links to other areas that have been identified around which there are substantial clustering opportunities. These are illustrated in the maps within this report. Finally the links to other parts of the New Anglia's strategic activities are highlighted.
- 3.3 Taking each element in turn:

### PART A: COMMON CONCERNS

#### Addressing the Critical Success Factors for Competitive Advantage

- 3.4 **Organising for a growth agenda – supporting strong formal and informal networks.** New Anglia LEP will support the formation and development of strong formal and informal networks led by the private sector. This is a key feature of New Anglia's Sector Growth Strategy. New Anglia has a series of sector networks discussing key barriers and new opportunities and helping companies to share ideas, trade or innovate. They are at various stages of development. Several sector groups such as Energy are world class in their aspirations, capable of extending beyond the sector and international in scale, others are more locally focused. Several of the groups like Life Sciences are in the early stages of their development but have some exciting high value prospects. In Tourism and Creative Digital and Cultural the sum of the parts brings exciting new opportunities.
- 3.5 **The skills challenge.** An ability to access and nurture a strong skills base is a critical success factor for the New Anglia Sector Growth Strategy. It is paramount that provision meets employer's current and changing needs and there is a suitable quality, mix and quantity of skills within local labour force.

- 3.6** In relation to skills the next table shows that there were some recurring themes amongst the sector groups. For some sectors, such as energy, skills were perceived as absolutely fundamental given the resurgence of key sub-sectors. There was a real desire to promote some of the more traditional sectors to young people and many sector leads are keen that providers respond to employer needs more explicitly. There are several key providers including: the Universities NUA, UCS and UEA and specialist FE Colleges such as Easton College, who can play a major role in skills provision in the Digital Creative, Life Science and Food, Drink and Agriculture Sectors.
- 3.7** Financial Services and Energy are investing heavily, or plan to, in skills infrastructure. This will give some momentum to addressing emerging skill needs. It will ensure new provision is developed which is high quality and attuned to the needs of the existing workforce as well as new labour market entrants including apprentices.
- 3.8** In Life Sciences and ICT growth is being driven by global businesses. They require a very high level of educational attainment ideally combined with practical skills such as project management. As well as addressing actual skills gaps in Tourism and Food and Drink and Agriculture notably, there is an urgent need to combat the effects of an ageing workforce in some industries. Here it is important that transferable skills, in engineering for example, are applied to sub-sectors where there is substantial growth such as renewables and nuclear industries. To summarise, balancing skills demand and supply is one of the most significant potential barriers to local sector growth in Norfolk and Suffolk and key priority for New Anglia LEP. If not addressed sector leads fear many new opportunities will be taken up by labour from outside the area and the workforces of global companies.
- 3.9** **Innovation and Technology.** Well-developed research structures and other forms of innovation (incremental, hidden or more radical) are also a critical component of the Sector Growth Strategy. This requires a supportive technology transfer environment supporting ideas from concept to market. The Life Sciences sector is translating scientific research into commercial ideas through clinical trials, accessing routes to market and developing new products, processes and services. Catalysts for research and innovation such as the NRP play a critical role in nurturing this growth.
- 3.10** Norfolk and Suffolk is home to world class scientists and major sector hubs in Food and Energy as well as the Norwich Research Park, Adastral Park and Hethel Engineering Centre. Many of these facilities are undergoing significant investment and will provide a focus for sector based growth. Nurturing new technology and supporting the development of new products and services is a fundamental part of the many of New Anglia's sector groups' strategies. New Anglia LEP will support, where appropriate, partner investment in innovation, new technology development and commercialisation whether this requires investment in new facilities such as: research facilities, technology parks and incubation services; and access to finance.

### Creating the Conditions for Growth

- 3.11** **Digital and Physical Connections:** A key growth inhibitor and common concern is broadband. High speed broadband infrastructure is increasingly becoming a business concern given new and fast changing technology and communication requirements. Both Norfolk and Suffolk have plans for the roll-out of next-generation fibre technology to enhance capacity. Some industries are content heavy others are disproportionately affected by their rural locations and require sufficient broadband capacity to offer on-line products and services.
- 3.12** In relation to physical connections, New Anglia will support sustainable improvements to key road and rail infrastructure links through critical corridors including links to Cambridge, Peterborough and the Midlands. It will work with local authorities to help ensure sufficient suitable employment land is allocated and retained in LDFs across Norfolk and Suffolk.

**3.13 Contributory factors to sector growth:** The board will help to support the many wider factors contributing to sector growth. ICT, Energy, Advanced Manufacturing and the Ports sector rely on the continued development and presence of large firms and global companies. They also rely on inward investment for their growth. This is particularly the case in renewables in the Enterprise Zone but also in other sectors like financial services where Norfolk and Suffolk can offer a genuinely competitive location for investors. Local companies wishing to develop, maintain or grow their markets will rely on an effective supply chain and in many instances export support. The sector groups and New Anglia Board will seek to promote company trade locally and further afield. Effective dialogue with key players is a key part of this

Critical Success Factors	Key Issues
Formal and informal partnerships	<ul style="list-style-type: none"> <li>• Sector networks based on new geographies (Lifesciences, Culture, Tourism, Advanced Manufacturing)</li> <li>• Building on established relationships (EEEGR, HEC)</li> <li>• Working in parallel to achieve similar objectives between the two countries (Financial services)</li> </ul>
An ability to access and nurture a strong skills base	<ul style="list-style-type: none"> <li>• Addressing skills shortages e.g. leadership, management, marketing and customer services (Tourism); technical farming skills, agricultural and food engineering, food production technology, business and marketing (Food and Drink and Agriculture); joint approach/investment to address skills gaps (Energy, Financial Services)</li> <li>• Higher level, graduate and post-graduate skills (ICT, Lifesciences, Financial Services)</li> <li>• Encouraging new provision (Food and Drink and Agriculture, Financial Services, Energy)</li> <li>• Addressing an ageing workforce and skills transferability (Ports and freight, Advanced Manufacturing and Engineering and Financial Services)</li> <li>• Promoting the image and profile of the sectors with education providers (Ports and Freight, Financial Services)</li> <li>• Better understanding and addressing business requirements (Advanced Manufacturing and Engineering)</li> </ul>
Well-developed research structures, and other forms of innovation	<ul style="list-style-type: none"> <li>• Continued investment in sector hubs and Science and Technology Parks and incubation facilities (Lifesciences, Food and Drink and Advanced Manufacturing and Engineering)</li> <li>• The Smart Anglia concept as a mechanism to promote digital research and technology</li> <li>• Innovation and new product development are important to: cultural and digital businesses (in terms for instance of generating income for content providers); Digital and Creative and Financial services (customer engagement through on-line interfaces); Advanced Manufacturing and Engineering (clean energy production and sustainable transport solutions); energy (new technologies) and service development (Financial Services).</li> <li>• Research and development underpin the growth of some sectors including (Lifesciences where concerns have been raised around the lack of funding available to support research)</li> </ul>

Contributory Factors	Key Issues
Formal and informal partnerships	<ul style="list-style-type: none"> <li>• Some areas are disproportionately affected by slow broadband speed (agricultural and rural areas)</li> <li>• Digital content is a key driver for some industries (Digital and Creative), which depend increasingly on fast broadband which is capable of carrying multimedia and allowing applications to function</li> <li>• Some sectors require consistent high speed (next generation) broadband requirements to function (ICT) or offer on-line services (Financial services and increasingly tourism)</li> </ul>
Physical Connections	<ul style="list-style-type: none"> <li>• Some sectors (Ports and Freight) desire sustainable improvements to key road and rail infrastructure links through critical corridors including links to Cambridge, Peterborough and Midlands. Current infrastructure (eg A12/A14/A47) needs to meet anticipated levels of demand. Several sectors (Ports, Advanced Manufacturing and Engineering, Food and Drink) rely on effective road and rail connections. The ports have highlighted the importance of the non-trunk/intra-regional road network</li> <li>• Coastal areas where energy projects are located aren't well connected to the rest of the UK and would benefit from a strategy to enhance their road and rail infrastructure. This is important for the raw materials for manufacturing. Some port infrastructure may require upgrading to allow offshore wind development</li> <li>• Ensuring sufficient sustainable employment land is allocated is important for some sectors (ports for expansion or Financial Services for inward investment) and retained in LDFs across Norfolk and Suffolk</li> </ul>
Contributory Factors	<ul style="list-style-type: none"> <li>• Supporting the presence of large firms, household names and global brands (Lotus, Aviva, Axa, British Sugar, Bernard Matthews, BT, AMEC, BAE Systems)</li> <li>• Effective support to encourage indigenous and foreign inward investment (suitable facilities and supporting infrastructure for instance)</li> <li>• Promoting effective supply chains (Energy; Advanced Manufacturing; Food and Drink and Agriculture)</li> </ul>



## PART B: HIGHER LEVEL THEMES

- 3.14** There are two major threads of activity or themes that provide the backdrop for the Sector Growth Strategy. They provide a framework for the activities and a platform from which to grow Norfolk and Suffolk's distinctive strengths. In short they help to define the shape, emphasis and structure of individual sector plans and priorities.

### Supporting a Green Economy

- 3.15** East Anglia has some of the richest farmland in the EU, a number of hi-tech clusters, a healthy diversity of energy sources, plus a wealth of cultural sites and a strong tourism industry. That said, as the driest, lowest-lying region of the UK with an extensive coastline and a large agricultural sector, it is literally on the frontline of climate change. Local economic growth therefore needs to embrace 'green' growth. Green growth is defined as follows:

*"A green economy is not a sub-set of the economy at large – our whole economy needs to be green. A green economy will maximise value and growth across the whole economy, while managing natural assets sustainably. It will help UK businesses take advantage of new markets for environmental goods and services, and to demonstrate the strong stance the UK is taking internationally to reduce carbon and tackle climate change."*

***The Government's Transition to a Green Economy Paper***

- 3.16** The **Green Economy Pathfinder Manifesto** makes a clear commitment to lead this growth, both in 'green' sectors – such as low-carbon energy generation and climate change adaptation services – and in others as they open up to green goods and services. The Pathfinder provides a helpful backdrop for much of what is happening within the sectors locally. The sectors will play their part in delivering the manifesto commitments by:

- Supporting Clean and Low Carbon Technology development particularly in the areas of energy, environment, transport and materials (advanced manufacturing and engineering sector) but also in terms of resource efficiency measures for business.
- Ensuring the scientific community is working to tackle major challenges concerned with the sustainability of our environment, our food supplies and healthy ageing (Life Sciences Sector).
- Ensuring the quality of Norfolk and Suffolk's natural environment is included as a key factor in its tourism offer and that New Anglia aspires to become a beacon of sustainable/responsible tourism practice (Tourism Sector).
- Promoting agricultural diversification including products for sustainable uses (e.g. crops for bio fuel production) and sustainable production through centres of excellence including CEEFAS and the Centre for Contemporary Agriculture (CCA) (Food, Drink and Agriculture Sector).
- Promoting new technologies in renewable and low carbon sectors. The rapid increase in offshore wind will ensure the area becomes a market leader and this will be reinforced through the 'Centre of Renewable Engineering' (CORE). (Energy Sector)

## Promoting a Visitor Economy

- 3.17** With a sector worth almost £5 billion and employment of 72,500 the visitor economy makes a substantial contribution to the New Anglian economy. Its success and vibrancy affects many other sectors including cultural digital and creative and food drink and agriculture. Combining the assets of two counties and the strengths of several sectors the development of the visitor economy offers a compelling narrative for visitors, businesses and residents. Visitors to the area will be able to draw on a critical mass of iconic tourist, cultural and retail destinations combined with exceptional and varied natural beauty. Events and festivals will celebrate the area's distinctive heritage and encourage new and longer visits to the area. The diversity and geographic spread of the tourism sector is part of its appeal. The sector plan offers a new era for simplified destination management.
- 3.18** The high quality natural environment, which attracts visitors to the area, is also an attraction for those working in the creative industries. This is particularly true for artisans using the area's environment and heritage as inspiration for their work. Creative and cultural businesses will be attracted to the area and visitors will be inspired to experience its visual and performing arts, creative writing, music, dance, media and museums. Food and drink is an integral part of the visitor economy. By focusing on the visitor economy producers will be able to find new markets for good quality, locally produced food and drink.
- 3.19** The sector paper notes that there is a clear opportunity to build on the success of day visits to promote extended stays through 'taster' visits to new markets. The diversity and proximity and value for money of the area is particularly appealing to 'time poor' visitors from London and the South East.

## Part C: Maximising Sector Connections

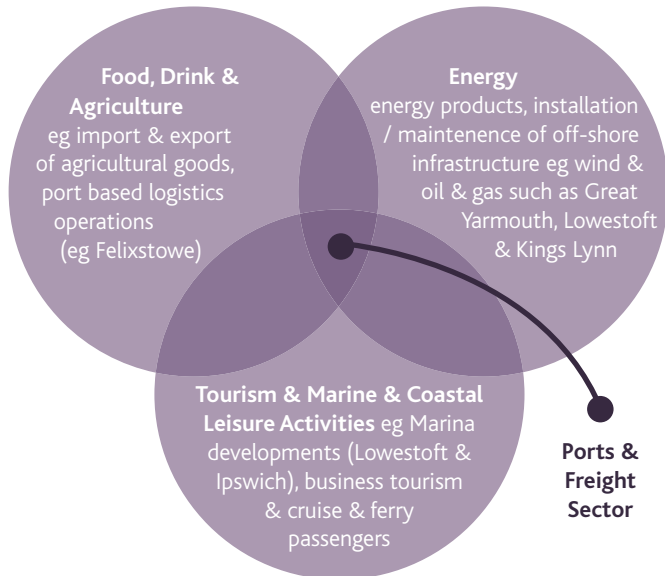
### Underpinning Sectors and Sector Connections

- 3.20** Several sectors by their nature 'bleed' into many activities and there are important links and dependencies between sectors and opportunities for joint initiatives. Three of the priority sectors underpin the growth of others including Financial Services, Advanced Manufacturing and Engineering and ICT and Digital Industries. Of course sectors like Retail, Ports and Logistics, Energy and Construction also rely on others for their growth. Looking at the underpinning sectors:
- As an enabling sector there are strong links between ICT and many other sectors. In particular there are important economic connections between ICT and the creative digital and cultural (heavy users), financial services (for service development) and health and life sciences (for ICT R&D activities) sectors.
  - Advanced manufacturing describes industries and businesses in many sectors that use a high level of design or scientific skills to produce innovative and technologically complex products and processes. It cuts across many areas from food and drink to energy.
  - Banks, financial services companies and insurers benefit from a significant, local client base including ports, marine industries and the energy sector.
- 3.21** Many other key economic sectors will grow as the priority sectors develop. For instance the construction industry will provide much of the supporting infrastructure for energy and the retail sector will benefit from increased visitors.

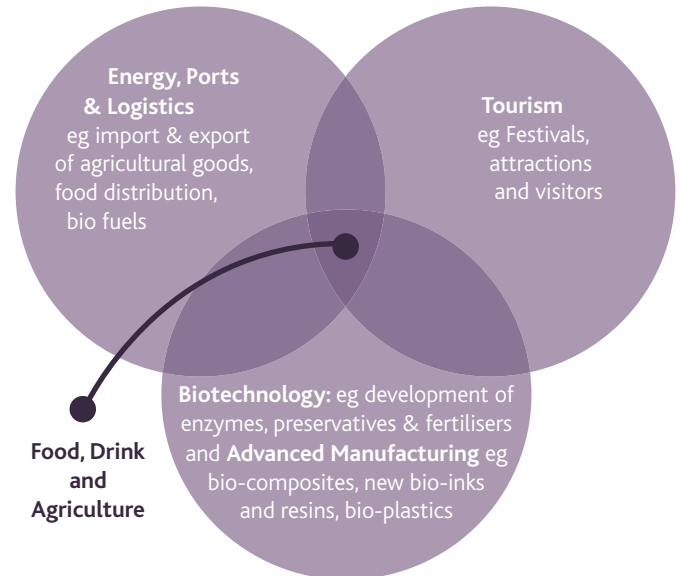


- 3.22 Two examples of the connections between sectors are illustrated in following diagrams. The sector groups and the New Anglia Board will support enabling sectors to fulfil their potential and underpin economic growth across Norfolk and Suffolk.

### Sector Connections: Ports and Infrastructure



### Sector Connections: Food, Drink and Agriculture



## Corridors of Growth and Links to other Areas

- 3.23 There are key spatial concentrations of activity and corridors of growth too that will be supported by sector groups and the LEP Board. They have a critical mass of businesses, interlinked supply chains and provide natural economic clusters on which to build and grow activity. These include for example (see also sector maps):
- A **bio-triangle** which links NRP in Norwich, UCS in Ipswich and Cambridge.
  - The **Southern North Sea** as a focus for off shore energy and port activities and to counteract some of the strong domestic and EU competition.
  - **Advanced manufacturing and engineering corridors** of growth around the A14 (automotive) or the Enterprise Zone (energy).
- 3.24 The LEP board is keen to look beyond the New Anglia boundaries and identify opportunities to link with other Local Enterprise Partnership areas. The LEP will exploit natural spatial links beyond the New Anglia boundaries. These might include:
- Greater Cambridge and Peterborough LEP through synergies Clean Tech, Bio Tech and Manufacturing research for instance;
  - South East LEP around Ports where there are complementarities and it makes sense to collaborate (e.g. around Harwich) and skills given both labour markets are closely linked;
  - London and Manchester around finance and insurance markets; and
  - Other areas across the UK including renewables (Teesside LEP), and nuclear technologies (Sheffield and Cumbria LEP for instance).

## Links to wider LEP priorities

- 3.25** New Anglia is committed to achieving sustainable economic growth and tackling barriers where they impact on growth across all sectors. The LEP Business Plan identifies these 'enabling activities' as infrastructure and business support.
- 3.26** For infrastructure, the LEP sees a clear role for itself in lobbying for improvements in transport, land availability and utilities as a means of opening up further investment and unlocking growth potential. The priorities for this are:
- Completion of A11 dualling and improvements to the A14 and A47;
  - Significant improvement in rail links including freight movement from the ports to the Midlands, reducing Norwich – London journey times, increasing capacity from Kings Lynn to the capital and developing East-West rail links;
  - Increasing utilities capacity for housing and employment growth areas and securing adequate water and energy supplies for sector growth requirements; and,
  - Unlocking land availability for employment at ports, business, research and technology parks.
- 3.27** New Anglia's Business information portal was recently launched. It provides an online platform and information gateway for business support available nationally and locally. The focus is on providing assistance to start-ups and SMEs, complementing Business Link internet and telephone advisory services that sit alongside support from individual local authorities. The LEP will support:
- Start-up workshops and business mentoring;
  - Access to finance, coaching for growth sessions and chargeable workshops on various topics;
  - Specialist advice for manufacturers and exports;
  - The provision of incubation space; and
  - Networking and collaboration opportunities.

# 4

## SECTION D: KEY ACTIONS: PROMOTING A FRAMEWORK FOR SECTOR GROWTH

**4.1** In summary the New Anglia Board and Executive will lobby, support and promote activities in four key areas (further detail is provided in Annex A – Areas for Action):

### **1. Achieving growth through sector connections including:**

- The aspirations of the Green Economy Pathfinder Manifesto with a clear commitment to growth in 'green' sectors – such as low-carbon energy generation and climate change adaptation services – and in others as they open up to green goods and services.
- Activities within the two priority sectors - energy and tourism. A balanced energy offer will be supported which promotes renewables and opportunities through the Enterprise Zone and CORE status. There will be a major focus on exploiting the sector benefits of the visitor economy.
- The capabilities and potential of key sectors, assets, exceptional areas of natural beauty, local produce and iconic destinations. The board will support those exploiting synergies within the visitor economy sector and simplifying the delivery infrastructure.

### **2. Critical success factors for sector development:**

- Formal and Informal Networks: The activities and priorities of the New Anglia Sector Groups lending their support to significant funding applications and aligning relevant national business support programmes. It will encourage the formation of new groups or sub-groups.
- Sector skills development, investment and diversification.
- Physical and digital connections including sustainable key road/rail corridor enhancements and super-fast broadband.

### **3. The underlying conditions to support sector growth including:**

- Substantial imminent partner investments underpinning sector growth in technology parks / research parks, energy (new build and decommissioning) and ports infrastructure.
- Strategic relationships with global and local companies, inward investors, UKTI and politicians in Westminster. The board will promote the locational benefits and sector strengths to specific target markets, countries or companies for inward investment purposes.

### **4. Corridors of growth and links to other areas including:**

- Advanced Manufacturing and Engineering growth areas, the South North Sea and the Life Sciences Triangle.
- The area's wider science and research centres of excellence.

- Entities and concepts which unite sectors such as Smart Anglia and Visit East Anglia.
- Other LEPs where it makes sense to do to achieve its growth aspirations.

- 4.2** The board will develop a short action plan setting out how it will deliver these key actions. Progress will be reviewed on an annual basis.

### **Key Actions for Sector Groups: Mobilising the Private Sector**

- 4.3** Each sector plan highlights its key priorities for growth. Collectively they can be summarised in the following three areas:

#### **1. The mobilisation of private sector interests**

- Organising for the growth agenda and building a 'growth coalition' across the two counties.
- Promoting networking, micro clusters and collaboration between local firms.

#### **2. Diagnosing key issues affecting the sector:**

- Providing a credible business-led voice articulating new employment opportunities, key barriers to growth and potential solutions.
- Providing co-ordinated marketing and promotional activity to support sector growth.
- Collating and marshalling up to date labour market evidence and economic intelligence where required.

#### **3. Developing effective collaborative growth strategies/priorities:**

- Working with providers to articulate, shape and deliver sector skills requirements. Sector groups will meet employer recruitment needs and skills and training requirements.
- Promoting the employment opportunities and improving the image of their sectors amongst young people and enhancing employer/education links.
- Exploiting links and opportunities with other sectors and promoting the work of the Green Economy Pathfinder and those involved in the visitor economy.
- Promoting the opportunities for research, business start-up, commercialisation and inward investment. Where appropriate to do so sector groups will support applied research and business research and development.

#### **4. Implementing priority growth actions:**

- Stimulating supply chain improvement and promoting diversification and the acceleration of energy technologies.
- Promoting the development of sector hubs and centres of excellence.
- Each sector group will follow its own priorities within this broad framework for growth. They will include some or all of the above.

## Key Actions for Local Authorities: Supporting the Conditions for Growth

**4.3** Local authorities are critical partners to achieving our growth objectives and across the two counties will help support the conditions for growth by:

- Working in a unified manner across the LEP area maximising joint assets, capabilities and combined sector strengths.
- Assisting the sector groups' wishes to help implement major capital investments through a planning regime balancing the protection of local communities with sustainable economic growth.
- Helping to ensure sufficient suitable employment land is allocated and retained in LDFs across Norfolk and Suffolk to support existing clusters of activity.
- Implementing the plans for the roll-out of next-generation fibre technology to enhance capacity. Local authorities will continue to making the case for on-going investment in superfast broadband.
- Continuing to support the work of sector groups through officer groups, economic intelligence and local expertise and insights.
- Aligning local plans, strategies, programmes and funding to the sector growth strategy where appropriate and feasible to do so. This may include ensuring adequate housing provision and choice is available to meet the sectors' growth aspirations. An example is that this study was jointly commissioned by New Anglia with Norfolk and Suffolk County Councils.

# 5

## ANNEX A: AREAS FOR ACTION

### Advanced Manufacturing Areas for Action

The LEP will support the on-going growth and development of the advanced manufacturing and engineering sectors within Norfolk and Suffolk by:

- Supporting the development of the Norfolk and Suffolk Advanced Manufacturing Group (for instance in terms of major funding bids for the sector).
- Supporting the above to lobby on behalf of the sector and align national business support programmes.
- Work with the group to gain a better understanding of the sector including identifying the needs of businesses and their skills requirements.

As a sector, advanced manufacturing and engineering industries through NAAME with support from HEC will:

- Run a series of events and manufacturing excellence clubs to support the development of the sector complementing existing initiatives operating in localities across Norfolk and Suffolk.
- Encourage participation in NAAME by advanced manufacturing and engineering companies in Suffolk.
- Seek to:
  - Provide a credible business-led voice for the sector in Norfolk and Suffolk highlighting needs and gaps communicated through ambassadors and wider media.
  - Successfully secure ERDF and other funding (RGF, Growing Places Fund) to deliver business support program, pilot innovation programs, business start-ups.
  - Encourage the development of Science and Technology Parks and incubation facilities across Norfolk and Suffolk, and support all business support programs.
  - Raise attainment and aspirations, improve signposting and awareness, encourage local hi tech delivery by learning providers.
  - Secure support for sector focused Technology Park developments including the nearby Lotus Technology Park (a £10M grant RGF bid has been approved).
  - Identify new opportunities and new sectors such as clean and low carbon technologies– and communicate opportunities to Norfolk and Suffolk engineering and manufacturing businesses.
- Encourage businesses to diversify and innovate, develop new products and services that are sustainable and exportable where possible and facilitate business start-ups within sector focused industrial estates and growth clusters.

## Digital and Cultural Areas for Action

The LEP should support the on-going growth and development of the cultural and digital sectors within Norfolk and Suffolk by:

- Encouraging the development of existing clusters of activity around Greater Norwich, Ipswich and Adastral Park.
- Making the case for on-going investment in superfast broadband for Norfolk and Suffolk and recognising the importance of broadband for the growth of digital and creative industries.
- Recognise the critical role of culture and heritage in enhancing Norfolk and Suffolk's tourism offer.
- Encourage and support any formalised joint working between the Norfolk & Suffolk Cultural Board, Visit East Anglia and the wider Tourism sector group.
- Encourage the development of new cultural offers across Norfolk and Suffolk.
- Raise the profile of the graphic design and communications sub-sector with targeted and intensive lobbying, innovation and celebration.

The two sub sectors cultural and digital creative industries should:

- Continue to build a better understanding of the extent and impact of the creative and design industries across the Norfolk and Suffolk economies through, for example, economic impact studies.
- Work together to develop and deliver a cultural tourism strategy, including new cultural products, across both counties.
- For cultural tourism, focus on 2013's Britten Centenary as a key opportunity to grow the offer, attract new visitors, promote extended stays and promote visits to multiple cultural attractions. Use this as the basis for identifying an annual/bi-annual cultural tourism event.
- Exploit the synergies with the visitor economy sector by establishing formalised working relationships with Visit East Anglia and the wider Tourism sector group.
- Continue to develop and expand relevant sector groups and forums across Norfolk and Suffolk.
- Showcase the capabilities of the graphic design and communications sub-sector.
- Encourage and support digital and creative industry development through incubation facilities in Ipswich and Norwich as a focus for growth of local businesses; and,
- Recognise the importance of digital technology and digital content creation and develop these industries particularly in the centres of Ipswich and Norwich.

## Energy Areas for Action

The LEP should support the on-going growth and development of the energy sector within Norfolk and Suffolk by support/backing:

- Its status as a Green Economy Pathfinder, the Enterprise Zone in Lowestoft and Great Yarmouth and a recognised 'Centre of Renewable Engineering' (CORE). The LEP will influence relevant government departments to maintain and develop the appropriate support for the sector.



- The development of the offshore wind supply chain and providing a coordinated energy message from the Norfolk and Suffolk to the outside world and helping to ensure there is strong local involvement in new opportunities.
- Continued development and production from the southern North Sea gas fields (and decommissioning activity).
- Those organisations and networks working on behalf of local companies currently working and wishing to work in the sector maintaining a robust supply chain. This should include:
  - (a) Helping companies pursue, understand and react to industry opportunities and support as they plan for market entry.
  - (b) Exploring diversification opportunities for Norfolk and Suffolk companies unaware of the sector, prioritising gaps in the supply chain and key competencies and capabilities that could allow for a direct transfer of skills into the market.
  - (c) Support investment in skills development initiatives meeting the skills shortages and requirement of employers and matching the substantial anticipated investment over the next half decade or so.
- Working with UKTI and others to promote existing and emerging strategic relationships with key overseas markets.

The sector groups for the area wish to:

- Support the private sector to make the energy opportunities happen. EEEGR as the lead private sector voice for the area claims it requires further income to sustain its current range of activities.
- Promote investor development work and seek to influence and secure second and third tier suppliers for the sector.
- The raise the profile and promote global awareness of Norfolk and Suffolk's industry, strengthening its ability to do business internationally.
- Stimulate supply chain improvement, and diversification, encouraging innovation, R&D, knowledge transfer and technology acceleration.
- Through EEEGR's Skills for Energy partnership to develop skilled people for the future of the industry, By:
  - Encouraging and facilitating access to the industry to all ages and skill levels
  - Providing informed local intelligence on employer demands
  - Ensuring that the current world class workforce continues to meet the needs of the industry both now and in the future through practical measures to meet skills shortages or gaps.

## Food, Drink and Agriculture Areas for Action

The LEP should support the on-going growth and development of the Food, Drink & Agriculture sector within Norfolk and Suffolk by:

- Promoting the locational benefits and sector strengths to help target new markets or companies for inward investment.
- Working with the sector to exploit links and opportunities with other sectors, particularly tourism but also energy, biotechnology and life sciences.
- Encouraging development of any new skills/training provision required (e.g. through the merger of Easton and Otley Colleges).

- Supporting the sector to work with school education providers to promote the sector as an attractive employment opportunity for young people.
- Supporting the work of the Food, Farming & Rural Economy Board (FFREB), taking the lead on issues relevant to the role of the LEP.
- Making the case for on-going investment in and accelerating delivery of superfast broadband, road and rail improvements in Norfolk and Suffolk.
- Promoting the New Anglia region as a centre of research excellence in food, drink and agriculture, including the Norwich Research Park and new Centre for Contemporary Agriculture.

As a sector, Food, Drink & Agriculture businesses will:

- Continue to focus delivery of the FFREB Strategic Plan to address the key priorities of the sector relating to:
  - Skills, training & people
  - Local food and tourism opportunities
  - Resource availability and efficiency
  - Removing constraints on business growth
- Encourage public sector buyers to procure local food supplies.
- Progress establishment of the Norfolk and Suffolk Food Hubs.
- Co-ordinate promotion of top Norfolk/Suffolk county food brands at national and international food fayres.

### ICT Areas for Action

The LEP will support the on-going growth and development of the ICT sector within Norfolk and Suffolk by:

- Promoting the development of Adastral Park as a centre for innovation, research and inward investment for ICT and ICT related businesses.
- Encouraging the growth of the Innovation Martlesham cluster, including developing a link between the Enterprise Hub at UCS and the incubators at Adastral Park.
- Making the case for on-going investment in superfast broadband for Norfolk and Suffolk.
- Working with local authorities to campaign for improvement in school level improvements in ICT education and promote the range of employment opportunities available to young people and graduates.
- Investigating new opportunities for flagship programmes related to future opportunities such as those associated with Technology Innovation Centres and sustainable development; and
- Develop the Smart Anglia initiative as a key component of the New Anglia Green Economy.

As a sector, ICT businesses should:

- Encourage the expansion of existing business networks, increasing membership across Norfolk and Suffolk and promoting the sharing and adoption of best practices.
- Support the development of local supply chains by building a better understanding of the company base beyond the key employment clusters.
- Exploit the synergies and potential for innovation resulting from large numbers of non ICT businesses who are users of technologies and drivers of new business models; and

- Draw together business and partners that will support the government in changing the way ICT is taught in schools and universities and make a visible contribution into Norfolk and Suffolk schools.

## Financial Services Areas for Action

The LEP will support the on-going growth and development of the Financial Services sector within Norfolk and Suffolk by:

- Promoting the locational benefits and sector strengths to target specific markets, countries or companies for inward investment.
- Working with the sector to exploit links and opportunities with other sectors, particularly ICT, digital and creative industries.
- Encouraging development of any new skills/training provision required (e.g. skills and qualifications needed to create or utilise new technologies).
- Supporting the sector to work with school education providers to promote it as an attractive employment opportunity for young people.
- Supporting the continued work of the Financial Industries Group (FIG) – and any new sector group which may appear for Suffolk or Norfolk/Suffolk combined (see below).
- Making the case for ongoing investment in and accelerating delivery of superfast broadband, road and rail improvements in Norfolk and Suffolk.

As a sector, businesses in the financial service sector should:

- Consider options and potential benefits of establishing a networking/co-ordination body for Suffolk.
  - This could work with Norfolk FIG developing a Suffolk model or extending the geographical coverage of FIG to incorporate Suffolk business representatives.
  - A resource plan for the preferred option would be agreed.
- Agree and deliver strategy for promotional activity including target markets for inward investment.
- Agree and develop strategy for exploiting links and opportunities with other sectors, particularly those in ICT, creative and digital industries.
- Include actions for skills/training and any developmental work with school education for new provision requirements.

## Ports and Logistics Areas for Action

The LEP will support the on-going growth and development of the Ports and Logistics sector within Norfolk and Suffolk by support/backing:

- Collectively lobbying on behalf of the sector in key areas of growth, promoting:
  - The ports role in the Great Yarmouth and Lowestoft EZ and as integral partners in the area's Centre for Offshore Engineering (CORE) status. This will require work with inward investment teams and key players – including Scottish Power and Vattenfall around offshore opportunities and UKTI.
  - European hub status for Felixstowe and its associated activity including distribution, manufacturing and HQ facilities.
  - Tourism from the growth in cruise/ferry passenger traffic from Harwich including the development of packages between the tourism sector and ferry operators to retain visitors/visitor spend locally.

- Sizewell will require a temporary port/assistance from existing ports.
- Ensuring sufficient suitable employment land is allocated within reasonable access to the key ports and retained in LDFs across the Norfolk and Suffolk authorities to support the sector. The ports group would like to explore streamlined planning applying LDO principles to non-EZ ports.
- Helping to secure sustainable improvements to key road and rail infrastructure links through critical corridors including links to Cambridge, Peterborough and the Midlands. It is important current infrastructure (eg A12/A14) meets anticipated levels of demand.

As a sector the ports group wish to:

- Promote a joined up offer which sets out the combined strengths and potential of the ports and their associated activity - the "South North Sea". The would offer a strategic location for cost effective UK and EU distribution and credible alternative to strong players further north (Aberdeen). The LEP ports group feel that the title "ports and freight" captures this sector well and may decide to badge itself in this way.
- Update current economic intelligence about the sector highlighting its performance and potential. The Norfolk and Suffolk key Ports have started to meet as part of the LEP sector group and will meet every 2-3 months raising key areas of concern.
- Working with schools, colleges and Job Centre Plus to promote the opportunities for working in the Ports and Logistics sector and collate evidence of skills shortages and recruitment difficulties in the sector. Improving the profile and image of the sector and link employers and enhancing links between industry and the education sector.

### **Tourism Areas for Action**

The LEP will support the on-going growth and development of the tourism sector within Norfolk and Suffolk by:

- Continuing its efforts to bring about better co-ordination of marketing and promotional activity, through steering local authority actions or encouraging more private sector involvement.
- Supporting industry efforts to exploit the Olympic opportunity.
- Supporting the industry and local authorities to bring new, large visitor attractions to the area, such as the Snoasis development.
- Informing the industry of any opportunities arising to access national funding pots and supporting the bid process where possible.

As a sector, the tourism industry will:

- Work together to develop a strategy for attracting new visitors through 'taster visits' and encouraging previous visitors to return for extended stays.
- Agree a strategy for exploiting the Olympic opportunity, particularly as a means of tapping into overseas markets.
- Exploit the synergies with the food, drink, cultural, creative and retail sectors.
- Work together to provide consistent marketing and promotional messages for tourism in the area, using all available advertising channels.
- Co-ordinate an approach to 'smart promotion', working with transport providers, retail, food and drink outlets, accommodation providers, cultural venues and festival promoters to develop special discounts and promotions to attract new/extended day visitors.

## Life Sciences and Bio Technology Areas for Action

The LEP should support the on-going growth and development of the Life Sciences sector within Norfolk and Suffolk by:

- Supporting the expansion of the Norwich Research Park, putting the enabling infrastructure in place to make it a commercially attractive proposition to expanding and new businesses.
- Promoting the new opportunities at NRP for research, inward investment and commercialisation.
- Supporting the promotion of the Life Sciences Triangle as a location for life science/biotech businesses, highlighting the general and specific benefits offered by the New Anglia region.
- Promoting locations at Ipswich, Haverhill, Mildenhall, Newmarket and other identified 'hubs' as life science/biotech employment centres.
- Promoting the New Anglia region as a centre of research excellence to help attract domestic and overseas students.
- Fostering the development of a strong regional Angel Investor network operating outside of Cambridge.
- Working with the sector to identify specific opportunities to bid for research and infrastructure/development funds.

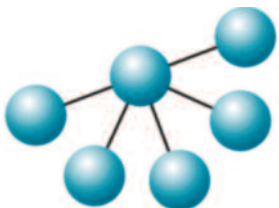
As a sector, Life Sciences businesses should:

- Consider the merits or otherwise of setting up a Life Sciences & Biotechnology Group to agree growth priorities and co-ordinate activity across the region.
- Speed up the rate of commercialisation of research findings into product design and manufacture.
- Promote the opportunities for research, business start-up, commercialisation and inward investment across the Life Sciences Triangle; specifically at the NRP, UCS and surrounding area, Mildenhall, Haverhill and the equine cluster at Newmarket.

# NEWANGLIA

Local Enterprise Partnership  
for Norfolk and Suffolk

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