



GREAT YARMOUTH
BOROUGH COUNCIL

Economic Development Committee

Date: Monday, 19 November 2018
Time: 18:30
Venue: Supper Room
Address: Town Hall, Hall Plain, Great Yarmouth, NR30 2QF

AGENDA

Open to Public and Press

1 APOLOGIES FOR ABSENCE

To receive any apologies for absence.

2 DECLARATIONS OF INTEREST

You have a Disclosable Pecuniary Interest in a matter to be discussed if it relates to something on your Register of Interests form. You must declare the interest and leave the room while the matter is dealt with.

You have a Personal Interest in a matter to be discussed if it affects

- your well being or financial position
- that of your family or close friends
- that of a club or society in which you have a management role
- that of another public body of which you are a member to a greater extent than others in your ward.

You must declare a personal interest but can speak and vote on the matter.

Whenever you declare an interest you must say why the interest

arises, so that it can be included in the minutes.

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|--|--|----------------|
| 3 | <u>MINUTES</u> | 4 - 9 |
| <p>To confirm the minutes of the meeting held on the 8 October 2018.</p> | | |
| 4 | <u>FORWARD PLAN</u> | 10 - 10 |
| <p>Report attached.</p> | | |
| 5 | <u>BREXIT AND GREAT YARMOUTH DOCUMENT</u> | 11 - 44 |
| <p>Report attached.</p> | | |
| 6 | <u>TOURISM AND CULTURE STRATEGY UPDATE</u> | 45 - 48 |
| <p>Report attached.</p> | | |
| 7 | <u>NALEP - GROWTH DEAL</u> | 49 - 49 |
| <p>The Development Director will present on the New Anglia Local Enterprise Partnership - Growth Deal.</p> | | |
| 8 | <u>BEACON BUSINESS PARK EXTENSION MASTERPLAN & FURTHER FEASIBILITY WORK</u> | 50 - 81 |
| <p>Report attached.</p> | | |
| 9 | <u>ECONOMIC DEVELOPMENT - QUARTER 2 PERFORMANCE REPORT 2018-19</u> | 82 - 86 |
| <p>Report attached.</p> | | |
| 10 | <u>TOWN CENTRE MASTERPLAN MEMBERS WORKING GROUP MINUTES</u> | 87 - 91 |

The minutes of the Town Centre Masterplan Members Working

Group held on the 8 October 2018 are attached for noting.

11 GREAT YARMOUTH TRANSPORT AND INFRASTRUCTURE 92 - 97
STEERING GROUP MINUTES

The minutes of the Great Yarmouth Transport and Infrastructure Steering Group held on the 26 September 2018 are attached for noting purposes.

12 ANY OTHER BUSINESS

To consider any other business as may be determined by the Chairman of the meeting as being of sufficient urgency to warrant consideration.

13 EXCLUSION OF PUBLIC

In the event of the Committee wishing to exclude the public from the meeting, the following resolution will be moved:-

"That under Section 100(A)(4) of the Local Government Act 1972, the public be excluded from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in paragraph 1 of Part I of Schedule 12(A) of the said Act."

Economic Development Committee

Minutes

Monday, 08 October 2018 at 18:30

Present :

Councillor B Coleman (in the Chair), Councillors Bird, P Carpenter, Cordiner-Acenbach, Grant, Hammond, Hanton, Jeal, Lawn, Wainwright, Walker and T Wright.

Councillor Plant attended as a substitute Member.

Also in attendance :

Mr D Glason (Development Director), Mrs J Beck (Head of Property and Asset Management), Mrs P Boyce (Head of IT, Communications and Marketing), Mrs K Watts (Strategic Director) Mr I Parkes (Norfolk County Council), Mr D Allfrey (Norfolk County Council) and Mrs S Wintle (Member Services Officer).

1 ONE MINUTE SILENCE

Members stood in a one minute silence following the recent passing of Councillor Charles Reynolds.

2 APOLOGIES FOR ABSENCE

There were no apologies for absence received.

3 DECLARATIONS OF INTEREST

Councillor T Wright declared a non pecuniary interest in item 7 in his capacity as a Member of the Great Yarmouth Port Users Association Committee where comments had been made in relation to the consultation process for the Third River Crossing.

4 MINUTES

The minutes of the meeting held on the 3 September 2018 were confirmed.

Councillor T Wright advised that he had received as requested figures for the Town Centre spend, however noted that he had requested further detailed work on the exact spend, the Strategic Director pointed out that high level spend figures had been supplied by the Finance Director but that further detailed works would be undertaken.

5 FORWARD PLAN

RESOLVED :

The Committee note the contents of the Forward Plan for the Economic Development Committee.

6 UPDATE ON MARKET GATES TOILETS - GATING OF THE AREA

The Committee received and considered the Strategic Director's report which provided Members with an update with regards to gating the passageway underneath Market Gates Shopping Centre and asked Members to note that no decision to close the Market Gates Toilet would be made until the Marketplace redevelopment is confirmed.

The Strategic Director reported that Historic England needed to approve the works that had been proposed as the town walls were a historic landmark, and therefore works could not be progressed without consent.

Members discussed their concerns in relation to support not being granted by English Heritage and it was suggested that Officers go back to English Heritage and point out the concerns raised by Members and how the proposals for gating were to protect the wall. The Chairman asked for a briefing note to be sent to all Members of the Economic Development from Historic England detailing the legal definition of powers and comments to

concerns raised and that this matter be discussed at the next meeting.

Some concern was raised in relation to the potential of loss of future funding from Historic England in relation to concerns being raised.

RESOLVED :

That the Committee note the content of this report and note that no decision to close the Market Gates toilets would be made until the Marketplace redevelopment is confirmed in due course.

7 STRATEGIC REVIEW OF EVENTS

The Committee received and considered the Head of IT, Communications and Marketing's report which asked Members to note the current events programme including the type of support provided by the Council and also feedback comments to help inform the future direction of an events programme linked to the Council's six corporate priorities.

The Chairman reported that in his opinion the inclusion of the Cultural Heritage / Tourism Strategy needed to be included within the recommendation for future direction of events programme to ensure the Strategy forms part of the programme, this was agreed.

RESOLVED :

(1) That the Committee note the current events programme including the type of support provided by the council.

(2) That comments to help inform the future direction of an events programme linked to the Council's six Corporate Priorities and Cultural Heritage / Tourism Strategy with a view to agreeing the future shape of the events programme and resource level from 2019/20 onwards be fed back to the Head of IT, Communications and Marketing.

8 GREAT YARMOUTH THIRD RIVER CROSSING - CONSULTATION

The Committee received and considered the Development Director and Senior Strategic Planner's report which asked Members to support the Great Yarmouth Third River Crossing proposals, as set out in the Stage 3 (Statutory pre-application) Consultation.

Members received a presentation from David Allfrey, Norfolk County Council which illustrated the two proposed bridge types to be used for the project and gave an update on work completed to date. It was advised that a final decision on which bridge type would be used for the project would be completed once the constructor had been appointed. Members were also reminded that the project completion date had been scheduled for early 2023.

In discussing the report and presentation the following comments were made :-

- Councillor T Wright noted the conversations that had taken place with specific businesses at the port and was pleased that these had taken place. He asked whether any assessment had been undertaken on potential job losses of those small businesses who were to be affected by the proposals specifically the smaller construction businesses. It was advised that the County Council had engaged with the Port Users Association and would continue to do so, it was hoped that this engagement would encourage those small businesses to raise their concerns or comments to be addressed.
- Councillor Plant commented on the important need for good traffic management to be put in place for the project and also advised that a report was due to go to the County Council on the full funding for the scheme.

RESOLVED

That support be given to the Great Yarmouth Third River Crossing proposals, as set out in the Stage 3 (Statutory pre-application) Consultation and the Committee endorse the response contained within the Development Director and Senior Strategic Planner's report.

9 INTEGRATED TRANSPORT STRATEGY FOR NORFOLK AND SUFFOLK

The Committee received and considered the Development Director's report which asked Members to note the published Integrated Transport Strategy for Norfolk & Suffolk and its relevance to the borough of Great Yarmouth.

The Development Director reported that the Strategy was intended to set out the key transport requirements for the two counties, and could influence the priority and resources devoted to particular projects. A number of the proposal themes related directly to the Borough, and the Borough Council is identified as one of the delivery partners for the Strategy. Members were advised that the Strategy would also sit above and shape the emerging Great Yarmouth Transport Strategy.

RESOLVED :

The Committee note the contents of the Development Director's report and the published Integrated Transport Strategy for Norfolk & Suffolk and its relevance to the borough of Great Yarmouth.

10 GREAT YARMOUTH TRANSPORT STRATEGY

Members received and considered the Development Director and

the Executive Director of Community & Environmental Services of Norfolk County Council report which asked Members to endorse the associated Stage 1 Issues and Opportunities report for the Great Yarmouth Transport Strategy and the long list of transport schemes, adding any further suggestions for appraisal.

Ian Parkes, Senior Infrastructure Growth Planner, Norfolk County Council report that Members of the Great Yarmouth Transport and Infrastructure Steering group formally supported the proposals for developing a transport strategy for Great Yarmouth at their meeting on 6 March 2018. The work is being carried out by WSP consultants, steered and guided by both Norfolk County Council (NCC) and Great Yarmouth Borough Council (GYBC).

Members were advised that to date an analysis of the problems and issues had been carried out with stakeholder engagement and Vision and Objectives established. The next steps were to appraise a long list of possible transport schemes to determine their appropriateness for inclusion into the strategy. A further report to the Great Yarmouth Transport and Infrastructure Steering Group had been proposed for mid-December 2018.

In discussing the report the following matters were discussed :-

- Whether consideration would be given to rural areas within the strategy, it was advised that this matter would be fed-back although it was noted that the area for the Strategy currently covered the Town Centre itself.
- Members felt that the strategy was a positive comprehensive report for the Town Centre
- Whether consideration had been given to cycle lanes and mobility scooter usage, however some concern was raised by some Members on this matter as it was felt that a majority of cycle lanes were unused.
- It was noted that the word 'Gorleston' was spelt incorrectly.
- Clarification was sought on Autonomous vehicles, it was advised that these were self driving cars.

RESOLVED :

- (1) The Committee note the contents of the Development Director and the Executive Director of Community & Environmental Services report.
- (2) The Committee endorse the associated Stage 1 Issues and Opportunities report for the Great Yarmouth Transport Strategy and the long list of transport schemes.

11 REGENERATING SEASIDE TOWNS AND COMMUNITIES – COUNCIL WRITTEN RESPONSE TO THE HOUSE OF LORDS SELECT COMMITTEE

The Committee received and considered the Regeneration and Funding Manager's report which provided a background and overview to the response

for the House of Lords Select Committee as coordinated by Officers in the Council, and asked Members to review the response and provide comment on its contents and endorse the dissemination of the response to the House of Lords Committee by the deadline of 9 October 2018.

RESOLVED :

(1) The Committee Review and note the response.

(2) That the Committee endorse the dissemination of the response to the House of Lords Committee by the deadline of 9 October 2018.

12 WINTER FESTIVAL UPDATE

The Committee received an update in relation to the Winter Festival from the Head of Property and Asset Management.

Members discussed the event schedule and the Head of Property and Asset Management reported that she also sought approval from Members to open invitations for the Christmas Fayre Weekends to all Traders in the hope to fulfil the aims of the Winter Festival. She advised the Christmas Fayre would be held the 1st weekend with Christmas Markets being held on all further weekends in the run up to Christmas.

Councillor Hammond proposed that the event be endorsed for a five year period, although Members were keen for the event to progress in future years, it was suggested that this not be taken forward in light of the Councils expenditure outlook.

RESOLVED :

(1) That Members endorse the opening of weekend markets to all traders.

(2) That the Committee note the update from the Head of Property and Asset Management.

13 ANY OTHER BUSINESS

Councillor Jeal asked if an update report could be provided on the reduction in Market fees that had been approved. It was agreed that this matter be added to the Committee's forward plan. The Head of Property and Asset Management reported that 2 additional 2 day Market Traders were now in place following the reduction in fees.

The meeting ended at: 20:30

Forward Plan for Economic Development Committee

	Matter for Decision	Report by	Pre Agenda Meeting (PAM)	Economic Development	Policy & Resources	Council
1	Beacon Park Extension	Development Director/ Head of Planning & Growth	09/11/18	19/11/18		
2	GY Brexit Response Paper and Report	Head of Inward Investment	09/11/18	19/11/18		
3	NALEP Growth Deal (Update for Members on funding for infrastructure through New Anglia LEP)	Development Director	09/11/18	19/11/18		
4	Quarter 2 Performance Report	Development Director	09/11/18	19/11/18		
5	Tourism and Culture Strategy Update	Strategic Director (KW)	09/11/18	19/11/18		
6	Business Rate Pool - January Update	Head of Inward Investment	20/12/18	07/01/19		
7	Rapid Electric Recharge Point Report	Head of Customer Services	20/12/18	07/01/19		19/02/19
8	Offshore Energy Update	Development Director	08/02/19	18/02/19		
9	Annual Performance Report	Development Director	TBC	TBC		
10	Quarter 3 Performance Report	Development Director	TBC	TBC		
11	Revised Action Plan for Economic Growth Strategy	Head of Inward Investment	TBC	TBC		

Subject: **BREXIT AND GREAT YARMOUTH DOCUMENT**

Report to: Economic Development Committee – 19 November 2018

Report by: Simon Best: Regeneration and Funding Manager
Michelle Burdett: Head of Inward Investment

SUBJECT MATTER/RECOMMENDATIONS

This report provides a background to the draft *Brexit and Great Yarmouth* document, compiled by officers at the Council, which is included as an appendix. Members are asked to:

1. Consider whether or not they wish to add to the two appended papers already published by New Anglia LEP and Norfolk County Council by adopting a Great Yarmouth-focused document;
2. Review the *Brexit and Great Yarmouth* document and provide comment;
3. Endorse its adoption as a *living document* that would be updated periodically to reflect developments.

1 BACKGROUND

- 1.1 Norfolk County Council and New Anglia Local Enterprise Partnership (LEP) have each published documents that analyse Brexit in relation to their respective constituencies and priorities and each is appended to this Report. A need was identified to integrate and extend these and make them more relevant to Great Yarmouth Borough Council, its residents and businesses.
- 1.2 The document is intended to be a *living document* that would be updated periodically to reflect developments – including the terms of ongoing negotiations with the EU – and react to specific challenges and opportunities as they arise.
- 1.3 There is no specific deadline associated with this exercise. It is noted that there are numerous uncertainties implicit in complex, ongoing negotiations of this kind and, therefore, inherent difficulties in analysing and updating challenges and opportunities on that basis.

2 THE RESPONSE

- 2.1 The document is effectively a snapshot, drawing heavily upon LEP and County analyses and other contemporary information/commentary. It represents an attempt to compile an objective, evidence-based response focused on the Borough.
- 2.2 It also sets out obvious opportunities for Council intervention, summarised as follows:
 - ensure that [*Brexit and Great Yarmouth*] is a *living document*, updated periodically to reflect developments and react to specific, emerging challenges and opportunities – including any new market-development and export opportunities;
 - actively monitor the Brexit process and, wherever practicable, provide information and support to local residents and businesses in partnership – including working

with other business-facing organisations, such as Norfolk Chamber of Commerce, to deliver responsive, topical events and workshops, seminars and drop-in sessions as the UK prepares to leave the EU;

- identify channels through which it can actively promote the *Business Brexit Checklist* and *Business Brexit Risk Register*, published by the British Chambers of Commerce, and other practical information resources;
- seek to maximise the accessibility and visibility of the proposed Business Advisor and New Anglia Growth Hub locally;
- seek closer co-operation with the LEP and the County Council to ensure that the Borough's interests and those of its important sectors are fully reflected in key policies and strategies, such as the Local Industrial Strategy, Growth Deals and UK Shared Prosperity Fund operational programme;
- continue to actively engage with the Great Yarmouth Economic Reference Group, which comprises the Borough, partners from industry, commerce, education, culture and the public and third sectors. The Group serves to improve cooperation and communication across the local economy and, in particular, delivery of the Economic Growth Action Plan and the Borough's Economic Growth Strategy , adopted by the Council in 2017.
- actively explore ways to make its 'offer' and 'sense of place' more coherent for residents, potential residents, tourists and investors, encouraging private sector collaboration and ownership to grow the local economy and get businesses involved in promoting Great Yarmouth as a fast-growing coastal 'Enterprise Town', attracting inward investment and skilled workers to service growth opportunities and economic regeneration.
- continue to direct the new Head of Inward Investment and Regeneration & Funding Manager posts in support of these activities to champion local enterprise and drive local inward investment and economic resilience, growth and capacity.

3 FINANCIAL IMPLICATIONS

- 3.1 There are no specific financial implications for the Council arising from the document, but it recognises that Council-managed venues (for example, The Catalyst) could be used to host or co-host relevant seminars or other outreach activities as and when the need/demand is established.

4 RISK IMPLICATIONS

- 4.1 There are no obvious direct risk implications arising from this document.

5 CONCLUSIONS

- 5.1 Officers have compiled a draft document, which is appended to this report.

6 RECOMMENDATIONS

- 6.1 This report provides a background and overview document, as coordinated by officers in the Council.

Members are asked to:

1. Consider whether or not they wish to add to the two appended papers already

published by New Anglia LEP and Norfolk County Council by adopting a Great Yarmouth-focused document;

2. Review the draft *Brexit and Great Yarmouth* document and provide comment;
3. Endorse its adoption as a *living document* that would be updated periodically to reflect developments.

7 BACKGROUND PAPERS

1. Draft *Brexit and Great Yarmouth* document.
2. The Business Brexit Checklist can be downloaded from: <https://bit.ly/2Oi6JXg>
3. The Business Brexit Risk Register can be downloaded from: <https://bit.ly/2PetOe7>
4. The study commissioned by New Anglia LEP can be downloaded from: <https://bit.ly/2PsvihR>
5. 'Getting Norfolk ready for Brexit' can be downloaded from: <https://bit.ly/2QofVHw>

Areas of consideration: e.g. does this report raise any of the following issues and if so how have these been considered/mitigated against?

Area for consideration	Comment
Monitoring Officer Consultation:	N/A
Section 151 Officer Consultation:	N/A
Existing Council Policies:	N/A
Financial Implications:	Addressed above
Legal Implications (including human rights):	N/A
Risk Implications:	Addressed above
Equality Issues/EQIA assessment:	N/A
Crime & Disorder:	N/A
Every Child Matters:	N/A

Brexit and Great Yarmouth

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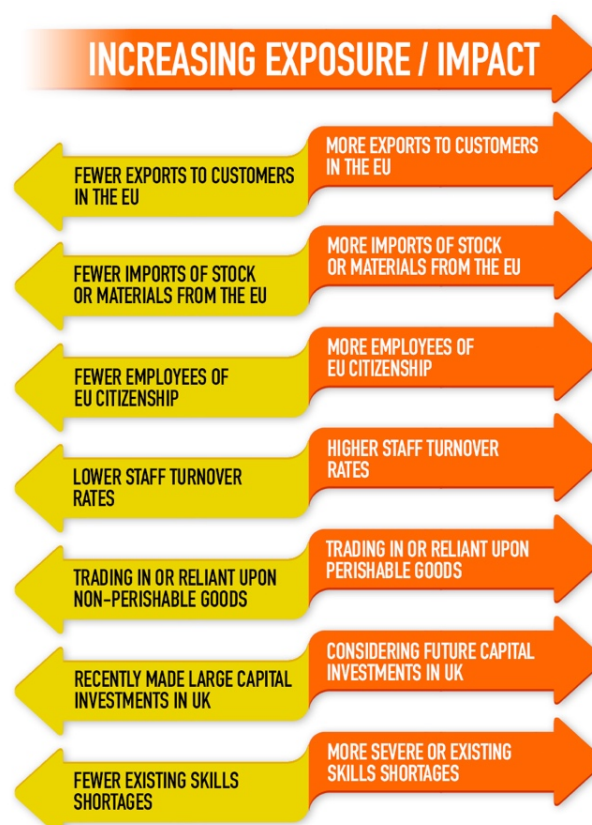
1. Executive summary

- 1.1 In September 2018, the Bank of England noted that the Brexit process to date has had a negative economic and social impact – much of which can be attributed to uncertainty around the outcome of negotiations. It also asserts that a disorderly – or *no deal* – Brexit, whereby no agreement is reached by the end of March 2019, would exacerbate the impact. As of October 2018, UK/EU negotiations are ongoing, but it appears that the risk of a *no deal* Brexit is receding.
- 1.2 The Bank predicts that, if there is a *good deal* with the EU, there could actually be a boost to the economy as latent demand constrained the present uncertainty is realised. The main opportunities arising from Brexit relate to the establishment of new trade partnerships worldwide (i.e. new export markets for UK goods/services) and the diminution of EU regulations and institutions.
- 1.3 Local government has a strategic and responsive role to play. Some actions are obvious – for example, effecting changes to the electoral roll as EU nationals lose the right to participate in local elections. In the short term, it is important for Great Yarmouth Borough Council to work actively with partners to support businesses and residents respond to the challenges and opportunities of Brexit.
- 1.4 Great Yarmouth Borough Council is committed to actively monitoring the Brexit process and, wherever practicable, providing responsive and impartial information and support to local residents and businesses in partnership with the County Council, the Local Enterprise Partnership and other governmental and non-governmental agencies.

- 1.5 The EU-funded New Anglia Growth Hub and others provide impartial advice and the Borough should seek to maximise the accessibility/visibility of that support locally. This might include, for example, hosting workshops, seminars and drop-in sessions within Borough-managed venues.

- 1.6 The importance of awareness-raising and early strategic preparation/mitigation is paramount. The Council will actively promote the *Business Brexit Checklist* and *Business Brexit Risk Register* published by the British Chambers of Commerce (links to both these documents are provided in *Section 10*) and signpost to other relevant materials.

- 1.7 Some key aspects affecting – or likely to affect – the Borough are summarised in the table, overleaf. A more detailed overview is presented in *Section 8*. The diagram to the right illustrates some of the key business issues and how they affect exposure to Brexit.



Area	Indicative challenges and opportunities
Workforce	<ul style="list-style-type: none"> • attracting and retaining skills and capacity in key sectors • increased wage costs/overheads
Trade	<ul style="list-style-type: none"> • diminished access to EU trading bloc and other states with which the EU has trade agreements • increased competition in local market from efficient and competitive trading partners from around the world • alternative opportunities for international trade as new deals are agreed, particularly for offshore sectors • potential local benefit from an uplift in domestic tourism if Brexit effects increase demand for 'staycations' and depress demand for overseas holidays • disrupted cross-border supply chains • import VAT on goods imported from the EU • currency volatility could make imports more expensive and exports more competitive • changes to the regulatory and patent regimes
Funding and investment	<ul style="list-style-type: none"> • diminished access to EU funding and European Investment Bank • diminished foreign direct investment
Social	<ul style="list-style-type: none"> • disruption to cross-border travel, customs and reciprocal healthcare • particular job vulnerability of lower skilled, less qualified workers • reduced pressure on public services offset by critical staffing issues in health and social care • potential supply/choice disruption for fresh food and medicines/treatments

- 1.8 The funding landscape will also change significantly. In 2016/17, the UK received over £5 billion in funding from EU programmes. The UK also receives loans from the European Investment Bank (EIB), which contribute approximately £25 billion per year to energy-related infrastructure, including offshore wind; EIB funding has made up a significant portion of wind farm construction costs, including the Galloper, Sheringham Shoal and Greater Gabbard wind farms. The Borough currently benefits as both a direct and indirect beneficiary of EU funding (see *Section 9.5*).
- 1.9 In the longer term, the need to rebalance, de-seasonalise and upskill the local economy will become even more important, as the Borough seeks to both attract new foreign direct investment and foster a start-up/growth culture against a possible backdrop of a) persistent domestic economic uncertainties, b) diminished access to the EU trading bloc, and c) increased access to the UK market by efficient and competitive trading partners from around the world.
- 1.10 In addressing this imperative, The Borough will seek closer co-operation with the LEP and the County to ensure that its interests and those of its important sectors are fully reflected in key policies and strategies, such as the Local Industrial Strategy and UK Shared Prosperity Fund operational programme.
- 1.11 New Anglia Local Enterprise Partnership is taking forward eight specific actions in relation to Brexit, which were endorsed by the LEP board in February 2018. The Council should seek to support these, wherever practicable¹:

¹ As reported in: New Anglia Local Enterprise Partnership (2018) *Board Meeting Agenda, Thursday 18 October 2018*

1. Develop a Local Industrial Strategy;
 2. Develop our sector and innovation strengths;
 3. Drive Inward Investment and place marketing;
 4. Gather Brexit intelligence;
 5. Champion local businesses;
 6. Improve targeting of business support;
 7. Support exporters;
 8. Collaborate with other parts of the UK.
- 1.12 This document draws heavily upon the themes and analyses presented in *The potential implications of Brexit for Norfolk and Suffolk: threats and opportunities of Brexit for key economic sectors*², published by New Anglia Local Enterprise Partnership, and Norfolk County Council's *Getting Norfolk ready for Brexit*³. Links to both these documents are provided in *Section 10*.
- 1.13 It also incorporates additional independent analyses. It attempts to focus on the issues of most relevance to the Borough of Great Yarmouth – e.g. the impact upon the key sectors of offshore wind energy, manufacturing, construction, tourism and health and social care.
- 1.14 Wider implications are acknowledged, but not specifically addressed in this document, including: scientific research; sport and culture; travel and holidays (including airline regulation/permitting and customs arrangements); higher education; Financial *passporting* and the diminution of London as an international centre for financial services and potential knock-on impact upon Norwich's own status as a centre of excellence for insurance, financial and professional services – the largest private sector contribution to Norfolk's economy; defence; security co-operation and transboundary policing; the environment.
- 1.15 This document is intended to be a *living document* and it will be updated periodically to reflect developments and react to specific challenges and opportunities.
- 1.16 The table, overleaf, summarises proposed Council actions in relation to Brexit.

² Metro Dynamics (2017) *The potential implications of Brexit for Norfolk and Suffolk: threats and opportunities of Brexit for key economic sectors*. New Anglia Local Enterprise Partnership

³ Norfolk County Council/Metro Dynamics (2018) *Getting Norfolk ready for Brexit*

The Council will:

- ensure that this is a *living document*, updated periodically to reflect developments and react to specific, emerging challenges and opportunities – including any new market-development and export opportunities;
- actively monitor the Brexit process and, wherever practicable, provide information and support to local residents and businesses in partnership – including working with other business-facing organisations, such as Norfolk Chamber of Commerce, to deliver responsive, topical events and workshops, seminars and drop-in sessions as the UK prepares to leave the EU;
- identify channels through which it can actively promote the *Business Brexit Checklist* and *Business Brexit Risk Register*, published by the British Chambers of Commerce, and other practical information resources;
- seek to maximise the accessibility and visibility of the proposed Business Advisor and New Anglia Growth Hub locally;
- seek closer co-operation with the LEP and the County Council to ensure that the Borough's interests and those of its important sectors are fully reflected in key policies and strategies, such as the Local Industrial Strategy, Growth Deals and UK Shared Prosperity Fund operational programme;
- continue to actively engage with the Great Yarmouth Economic Reference Group, which comprises the Borough, partners from industry, commerce, education, culture and the public and third sectors. The Group serves to improve cooperation and communication across the local economy and, in particular, delivery of the Economic Growth Action Plan and the Borough's Economic Growth Strategy⁴, adopted by the Council in 2017.
- actively explore ways to make its 'offer' and 'sense of place' more coherent for residents, potential residents, tourists and investors, encouraging private sector collaboration and ownership to grow the local economy and get businesses involved in promoting Great Yarmouth as a fast-growing coastal 'Enterprise Town', attracting inward investment and skilled workers to service growth opportunities and economic regeneration.
- continue to direct the new Head of Inward Investment and Regeneration & Funding Manager posts in support of these activities to champion local enterprise and drive local inward investment and economic resilience, growth and capacity.

⁴ Great Yarmouth Borough Council (2017) *Economic Growth Strategy 2017-2021*

2. Context and timeline

- 2.1 Following the result of the referendum of 23 June 2016, the official date for the UK's departure from the EU has been set as 29 March 2019. A transition period has been agreed for the period 29 March 2019 to 31 December 2020. This transition period will only apply if a withdrawal agreement is reached between the two parties.
- 2.2 The Cabinet's preferred model, known as the *Chequers Plan*, would effectively maintain harmonisation with EU rules on the trade in goods, covering only those necessary to ensure frictionless trade. There would be different arrangements for trade in services, with greater regulatory flexibility and strong reciprocal arrangements. Freedom of movement, as it stands, would end but a mobility framework would make provision for citizens to travel and apply for study and work. A new customs arrangement would be phased in and the UK would set its own tariffs and develop an independent trade policy.
- 2.3 It is understood that several alternative options remain on the table at this stage, including variations of a Canada-style option (CETA⁵), a Norway-style option (EFTA⁶), an extension of the *Article 50* negotiations or a *no deal* scenario in which both sides are unable to reach a withdrawal agreement. There are several differences between these options:
- **CETA:** comprehensive, but not universal, tariff-free trade in goods; limited access to trade in services; partial regulatory cooperation; an independent free trade policy. The deal excludes: financial contributions to the EU; free movement of people; regulatory equivalence; participation in common foreign and security policy.
 - **EFTA:** tariff-free trade in all goods and services (excluding certain fish and agricultural products); free movement of persons; a financial contribution to the EU; implementation of all EU Single Market regulations. The deal excludes: participation in current and future EU-third party trade deals; preferential access to the Single Market for agriculture and fisheries products; trade in goods without non-tariff barriers, such as export licences and rules of origin; Common Agricultural Policy (CAP) participation and funding.
 - **No deal:** the UK would revert to World Trade Organisation (WTO) trade rules on 29 March 2019 and be subject to the EU's external tariffs; EU laws would be transposed into UK law; the UK would not be subject to European Court of Justice (ECJ) rulings; the UK would be free to seek trade negotiations/deals immediately; the *Irish border question* would remain unresolved; the UK would not be required to contribute to the EU budget; the UK would be free to set its own immigration rules (reciprocal rights of EU and UK expats remains unclear); customs procedures would be suddenly imposed between the UK and EU, obliging the EU to require checks on lorries and ships coming from the UK.

The UK Government has set out a series of technical notes on how to prepare if there is a no-deal. In October 2018, consumer watchdog, *Which?*, assessed these technical notices⁷ and has claimed that potential impacts would include "immediate and 'severe' consequences for millions of consumers ... even with comprehensive contingency planning, there could be problems in a number of

⁵ The Canada-European Union Comprehensive Economic and Trade Agreement (CETA), 2017

⁶ The European Free Trade Association (EFTA) is a regional trade organisation and free trade area consisting of four European states: Iceland, Liechtenstein, Norway, and Switzerland

⁷ Which? (2018) *Brexit no-deal: a consumer catastrophe?*

areas, including travel, food, consumer products, energy and consumer rights ... with disruption on a scale not seen since the consumer chaos of the 1970s" – a parallel also referred to by the independent Office for Budget Responsibility (OBR) in the same month⁸. There does appear to be a general determination, on both sides of the negotiation, to avoid a *no deal* Brexit.

- 2.4 At the time of writing, negotiations are ongoing. If sufficient progress has been made, an informal EU Summit will be organised for 17-18 November to finalise and formalise a deal.
- 2.5 A political declaration setting out the future UK-EU relationship, which will accompany the withdrawal agreement, is currently being prepared by the EU and will set out the latest state of play when published in draft format. This non-binding document is key to the ratification of the UK/EU deal as it will map out the proposed future UK/EU relationship to be agreed upon during a transition period.
- 2.6 Before the end of January 2019, MPs will be offered a vote on the outcome of negotiations – whether a deal has been secured or not. This vote could lead to a few options, including agreement on a final deal, rejection and leaving without a deal, seeking to extend the *Article 50* negotiations or a call for one final push in negotiations to agree on an acceptable compromise.

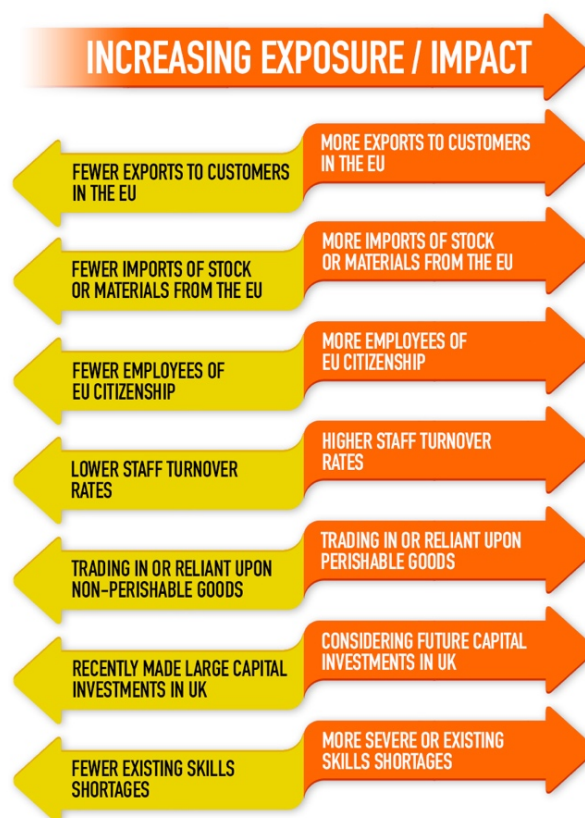
3. The impact upon businesses

- 3.1 Whilst Brexit is an important economic event, it is not the only major factor affecting the local economy. Other trends – such as demographic change, the rise of emerging markets, changing technologies and climate change – are also important to the future fortunes of local business.
- 3.2 Brexit offers opportunities and challenges. At the time of writing, the fact that the final shape of the deal between the UK Government and the EU is undecided creates uncertainty for businesses. The Financial Times reports an economic consensus that that these uncertainties have already damaged the UK economy and squeezed household finances, although opinions vary on the extent/duration of this effect⁹.
- 3.3 A Financial Times average of several models suggests that by the end of Q1 2018, the wider economy was 1.2% smaller than it would otherwise have been, equating to £24 billion or £450m/week. The hit to growth has, however, been smaller than HM Treasury predicted in its pre-referendum short-term forecasts, which wrongly assumed that the Government would instigate the two-year *Article 50* process immediately.
- 3.4 The British Chambers of Commerce maintain two particularly relevant documents. The first is its *Business Brexit Checklist*, which has been designed to help businesses consider the changes that Brexit may bring and assist business planning at both operational and board levels. The second is its *Business Brexit Risk Register*, which is updated monthly. This tracks strategic uncertainties from a business and trade perspective, in terms of the ongoing UK/EU negotiations. Links to both these documents are provided in *Section 10*.

⁸ Office for Budget Responsibility (2018) *Discussion paper No.3: Brexit and the OBR's forecasts*

⁹ Financial Times (2018) *What are the economic effects of Brexit so far?*

3.5 Different sectors and different businesses will be affected in different ways. This may be due to factors such as their size and composition, the extent of trade with the EU, and their dependency upon EU employees. It may also be influenced by staff turnover, whether companies deal with perishable goods, whether they have made recent capital investments or intend to in the near future, or whether there are existing skills shortages in their sector. The diagram to the right simplifies and illustrates some of the issues and how they affect individual businesses' exposure to Brexit.



3.6 New Anglia Local Enterprise Partnership's report¹⁰ was commissioned to provide a detailed analysis of the potential impacts of Brexit on six economic sectors identified in the Norfolk & Suffolk Economic Strategy¹¹: agricultural, manufacturing, construction, offshore wind energy, digital and life sciences.

3.7 These were selected on the basis of a) their particular significance to the Norfolk and Suffolk economy (both in terms of employment and value added), b) the likelihood of them being highly impacted by Brexit, and c) their strategic importance to Norfolk and Suffolk.

3.8 Of these, offshore wind energy, manufacturing and construction are considered in this document because of their particular exposure and/or significance to the Borough in terms of contribution to the local economy and employment. Potential impacts, challenges and opportunities can be broadly classified as the following:

- **Trade**; future arrangements after the expected departure of the UK from the European Single Market, rapid adjustment to new trade arrangements and potential tariffs and other barriers and opportunities to increase the UK share of their supply chains and open their products to new markets worldwide;
- **Regulations**; primarily in terms of EU directives incorporated into UK law;
- **Workforce**; attracting and retaining the EU labour force, who are key to the future success of some of Norfolk and Suffolk most important sectors, such as agriculture, manufacturing, construction and life sciences;
- **Funding and investment**; the importance of ensuring continued funding for research, development and innovation (RD&I) and alternative sources of funding for

¹⁰ Metro Dynamics (2017) *The potential implications of Brexit for Norfolk and Suffolk: threats and opportunities of Brexit for key economic sectors*. New Anglia Local Enterprise Partnership

¹¹ New Anglia Local Enterprise Partnership (2017) *Norfolk and Suffolk Economic Strategy: A strategy for growth and opportunity*

sectors that often rely on EU subsidies and the capacity to continue to attract foreign private investment.

- 3.9 Tourism and Health and social care have also been included in this document because of their local significance, although each uses a different, more relevant, set of classifications.

4. Offshore wind energy

4.1 Background

- 4.1.1 Great Yarmouth probably has the world's largest concentration of offshore wind farm sites within 100 miles, including UK Round 3 wind farms, *East Anglia Array*, *Hornsea* and *Dogger*. It was also chosen to host the operations and maintenance for *Dudgeon Offshore Wind Farm* in 2014 because of the flexibility of its harbour, including the ability to handle a range of vessels, and the opportunity to locate offices and warehousing on the quayside. The purpose-built base was opened in 2016.
- 4.1.2 In 2016, Peel Ports Great Yarmouth was chosen to be Siemens' wind turbine assembly location and installation base for the 56-turbine, Round 2 wind farm, *Galloper*, which lies off the Suffolk coast and the construction base for 102-turbine *East Anglia ONE* wind farm, which is forecast to bring up to 3,000 jobs to the area¹² and substantial investment in the port. In October 2018, Swedish renewable energy giant, Vattenfall announced that it had agreed to reserve space at Great Yarmouth harbour to site an operations and maintenance base and dock the vessels needed for its *Norfolk Vanguard* and *Norfolk Boreas* wind farm projects.
- 4.1.3 Locally, the 3sun Group is a leading provider of skilled technicians for installation, inspection and operations and maintenance services of onshore and offshore wind turbines throughout the world, specialising in the UK, German and Danish markets.
- 4.1.4 Energy engineering specialists ODE handle onshore and offshore projects for greenfield and brownfield developments, often in challenging environments. ODE project-managed the 30-turbine *Scroby Sands Offshore Wind Farm* and, more recently, has installed a new pontoon and crane facilities on the *Dudgeon Offshore Wind Farm* base in Great Yarmouth.
- 4.1.5 Seajacks was established in Great Yarmouth in 2006 and owns and operates five of the world's most advanced and capable harsh environment self-propelled jack-up vessels, *Kraken*, *Leviathan*, *Hydra*, *Zaratan* and *Scylla*. With a track record of over 300 wind turbine installations, Seajacks' vessels provide an effective solution to the installation and maintenance of offshore wind turbines and foundations. Likewise, in the offshore oil and gas sector, the vessels have brought a new dimension to maintenance; modification; construction and decommissioning of wells and platforms in the North Sea.
- 4.1.6 A wider economy surrounds the wind farms. Local companies are present at all stages of the supply chain, offering a range of support services integral to the functioning of the farms. They focus mainly on supply, installation, commissioning, operations and maintenance.
- 4.1.7 Other local and international companies based in Great Yarmouth are already actively engaged in the European offshore wind industry. The Borough Council has collaborated with the East of England Energy Group and others to produce matrices that map and characterise local sector capability¹³. In the medium- to long-term, if these capabilities and skills can be retained within Great Yarmouth, it will be well-

¹² Great Yarmouth Borough Council (2016) *Offshore Wind/Energy Briefing: Report to Executive Leadership Team (ELT)*

¹³ East of England Energy Zone (2016) *Offshore Wind Supply Chain Capability Matrix*

placed to benefit from future growth in demand for the decommissioning/re-commissioning of existing North Sea assets.

- 4.1.8 There are over 600 production platforms in the North Sea; many are several decades old and approaching their expected lifespan. EU regulations will require many of these facilities to be decommissioned or re-commissioned over the next decade. Great Yarmouth is ideally located, has deep-water facilities, supply chain and fabrication skills to support this industry. Peterson, in a joint venture with environmental solutions provider, Veolia, has already invested £1m in a purpose-built decommissioning facility in the port area.

4.2 Trade

- 4.2.1 The UK is a net importer of energy¹⁴ but leads the world in offshore wind and, therefore, the country exports related services. These include cable installation, equipment repair and construction¹⁵. These services are exported worldwide to Europe, the USA and Asia – in recent years, UK offshore wind sector companies have won 115 contracts to build and service 50 offshore wind projects abroad. In a report by RenewableUK surveying 36 companies¹⁶, the UK offshore wind sector won contracts in 18 different countries in 2016.
- 4.2.2 This sector is considered to have great potential for growth in exports. It presents an opportunity to form new markets abroad, which will be crucial after Brexit¹⁷. The Government has recognised the sector's promise and even invited a delegation of senior Chinese figures to the UK to learn about offshore wind¹⁸. Post-Brexit, it is anticipated that exports will become more competitive due to the weak pound and the falling cost of offshore wind technology¹⁹.
- 4.2.3 However, Great Yarmouth and the wider UK's status as an ideal location to access the European offshore market, as asserted in a 2015 UK Trade and Investment²⁰ publication, would be significantly weakened by the removal of the UK from the single market. As with manufacturing and construction, the increased cost of importing materials and parts could also impact domestic capacity.

4.3 Regulations

- 4.3.1 Much UK energy policy has been shaped by the EU, encompassing member states' competitiveness, security and environment policies²¹. Post-Brexit, the UK will no longer be represented by EU energy bodies²². The most likely outcome of this for the UK offshore wind sector will be the necessity for continued adherence to EU regulations and an absence of UK strategic interests or influence over their formation²³. In the long-term, the UK may choose to determine its own regulations, but this may make the UK less competitive than other EU countries. Any regulatory changes will also impact business, funding and investment.
- 4.3.2 For instance, some contracts may have particular clauses which necessitate continued compliance with EU law. For projects which have secured EU funding, it

¹⁴ CBI (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*

¹⁵ RenewableUK (2016) *Exporting Offshore Wind*

¹⁶ RenewableUK (2017) *Export Nation: A Year in UK Wind, Wave and Tidal Exports*

¹⁷ RenewableUK (2017) *Export Nation: A Year in UK Wind, Wave and Tidal Exports*

¹⁸ RenewableUK (2016) *Exporting Offshore Wind*

¹⁹ Ambrose, J. (2017) *Government go full tilt for offshore wind power*. The Telegraph

²⁰ UK Trade & Investment (2015) *UK Offshore Wind: Opportunities for trade and investment*

²¹ Chatham House (2016) *UK Unplugged? The Impacts of Brexit on Energy and Climate Policy*

²² Allen and Overy LLP (2016) *The implications of Brexit for UK energy*

²³ Renewables Consulting Group (RCG) (2016) *Brexit: renewables unplugged*

may be necessary to align regulations, whilst future projects may have problems acquiring funding due to regulatory mismatches. Changes to rules surrounding mergers, acquisitions and joint ventures, which are important given overseas investors' interest in the UK offshore wind sector, would also be significant. It is possible that the UK will need to adopt rules corresponding to the EU Merger Regulation, otherwise EU-based investors would need to consider the application of UK merger control rules as well as those of the EU²⁴.

4.4 Workforce

- 4.4.1 One of the major existing challenges for the offshore wind sector relates to its workforce, as there is a shortage of offshore wind farm engineers in the UK²⁵. The Government's Offshore Wind Industrial Strategy, published in 2013, identified a lack of skills as a major issue, particularly in engineering, offshore skills, technician roles and roles specific to the sector, such as environmental analysis, lifting and helicopter/boat pilots. A general shortage of skilled engineers was identified as the driving factor. Other factors include competition from other sectors and the low profile of the industry; however, this is likely to change as the sector grows.
- 4.4.2 The offshore wind sector encompasses particular sub-sectors of construction and manufacturing, particularly given the importance of engineers, and is, therefore, likely to face similar problems post-Brexit. Furthermore, it is reasonable to assume that the skills shortage is likely to persist after the UK leaves the EU and may be exacerbated as local companies find it more difficult to access, attract and retain EU labour.
- 4.4.3 The need to incentivise specific skills/qualifications to manage the mismatch between skills supply and demand – the 'predict and provide' model – is generally acknowledged. The Norfolk & Suffolk Economic Strategy highlights the need for collaboration between businesses and schools to drive skills, employment and median wage and there is an opportunity to ensure that this is enshrined in the LEP's emerging Energy Sector Skills Plan.
- 4.4.4 It is recognised that for Borough residents to take job opportunities arising from the energy sector, having the right skill set is essential. Of particular importance are the STEM (science, technology, engineering and mathematics) subjects required to align education with employer needs (particularly in regard to the offshore/maritime sectors).
- 4.4.5 Provision in the Borough now reflects this, with a new Offshore Energy Skills Centre forming part of the proposed Institute of Technology, the East Norfolk Sixth Form, the University Campus Suffolk (UCS)-linked East Coast College's new Energy & Engineering Skills Centre of Excellence in Lowestoft (set to open in September 2019) and – slightly further afield – the University of East Anglia's energy engineering course. This medium- to longer-term strategy is, however, highly unlikely to offset the immediate impact of Brexit upon the sector.

4.5 Funding and Investment

- 4.5.1 EU funding has been a significant driver in the development of the offshore wind sector in the UK. EU funding and European Investment Bank (EIB) loans contribute approximately £25 billion per year to energy-related infrastructure, climate change mitigation, and research and development²⁶. Specifically, EIB funding has made up a

²⁴ Norton Rose Fulbright (2016) *UK offshore wind: What impact is Brexit likely to have on the UK's offshore wind industry?*

²⁵ Confederation of British Industry (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*

²⁶ Chatham House (2016) *UK Unplugged? The Impacts of Brexit on Energy and Climate Policy*.

significant portion of wind farm construction costs, including the *Galloper*, *Sheringham Shoal* and *Greater Gabbard* wind farms²⁷.

- 4.5.2 Another important source of funding is the European Fund for Strategic Investment (EFSI), which invests in energy infrastructure²⁸. The UK has received over £68 billion of EFSI funding, of which around a quarter has been used to fund energy projects, including offshore wind projects. Furthermore, the European Research Council and Horizon 2020 have contributed significantly to the funding of innovation, research and development (RD&I) in the energy sector.
- 4.5.3 The UK is likely to lose eligibility for these funding streams upon leaving the EU, which could constrain further development of the sector. As a non-EU (associate) member state, Britain would be able to participate in EU funding, but strict criteria need to be met, such as the free movement of people and a contribution to funds based on GDP and population. The UK may be able to access the 12% of EIB funds for renewable energy projects allocated to non-EU countries. This would not, however, compensate for lost access to larger funds.
- 4.5.4 The impact of Brexit on private investment in the sector is uncertain; many of the sector's key investors are based in the EU (e.g. Siemens and Vattenfall). The investment climate since the Referendum has remained relatively strong. However, Siemens, a major investor in and manufacturer of components for UK wind farms, put investment plans on hold in 2016, indicating a loss of confidence in the face of uncertainty.
- 4.5.5 Deterred investment is likely to be short-term, which can be managed if the Government provides the right incentives²⁹. Durham Energy Institute predicts that, in the longer-term, issues surrounding policy clarity may impede investment and the Director of External Affairs at RenewablesUK has said that they consider this the most important factor in guaranteeing long-term foreign investment.

5. Manufacturing

5.1 Background

- 5.1.1 Norfolk and Suffolk have a wide and diverse manufacturing sector. The manufacture of food products is by far the largest sub-sector. A failure to impose tariffs or quotas on imports or form free trade agreements with other countries may flood the domestic market with cheaper global imports – potentially subject to lower standards of animal welfare, food safety, land stewardship and environmental protection – reducing consumer living costs but damaging the domestic industry.
- 5.1.2 Other important sub-sectors in terms of employment include the manufacture of fabricated metal products, machinery and equipment, and rubber and plastic products. Manufacturing accounts for around 3,000 jobs in the Borough (7.7% of the workforce)³⁰.

5.2 Trade

- 5.2.1 Manufactured products account for 89.8% of total goods exports and 91% of total goods imports in the UK and UK-EU trade is substantial. The EU, taken as a whole, is the UK's largest trading partner by a significant margin. 44.5% of all UK exports are to the EU (53% in the East of England), compared to 13.1% to the USA. After the UK

²⁷ Norton Rose Fulbright (2016) *UK offshore wind: What impact is Brexit likely to have on the UK's offshore wind industry?*

²⁸ Watson Farley and Williams (2016) *Implications of Brexit on UK renewable energy*

²⁹ Utilitywise (2016) *UK investment post-Brexit*

³⁰ Office for National Statistics, 2017

leaves the EU, the future rules on trade will depend on what kind of agreement, if any, the UK reaches with the EU.

- 5.2.2 UK-EU exports are a bigger part of the UK's economy than the EU's. The £274 billion export of goods and services to other EU countries was worth 13.4% of the total value of the British economy in 2017. While the UK is a member of the EU, there are no tariffs on trade with other EU member states. The trade-weighted average EU import tariff for non-EU, non-agricultural products was 2.3% in 2014 (8.5% for agricultural products and 23.6% for sugars and confectionary); providing an indication of the tariff that could be levied on £274 billion of future UK exports to the EU.³¹
- 5.2.3 Manufactured goods move along complex supply chains which operate across the EU. The UK is reliant on exports to the EU, and the interdependency of companies along the supply chain in the single market means that the any imposition of tariffs would increase costs for manufacturers³². Any new regulatory barriers (for example, a divergence in standards/certification, customs barriers and changes to the free movement of people) would exacerbate this, particularly in sectors that are reliant upon time-dependent supply chains, such as the automotive sector.
- 5.2.4 The fall of the value of the pound, post-Referendum, has impacted the trade in manufactured goods in different ways and sterling appears set to remain weak. Firstly, this has increased the cost of imported manufactured products³³ and auditors, Creaseys, believe that this may boost the UK domestic market, as companies are forced to source nationally. Secondly, the weak pound cheapens exports, making UK exports more competitive – although this is likely to be offset by any imposition of import tariffs.

5.3 Regulations

- 5.3.1 The EU determines many manufacturing regulations and laws, which are standardised across member states. EU laws and regulations apply to many different legislative areas, including product safety, employment, health and safety, and environmental and consumer protection. Regulatory compliance is central to trade and investment agreements, particularly as many EU laws (for example those concerning labour markets and health and safety) have been integrated into domestic law). For instance, exports of manufactured goods are subject to various regulations and standards, which facilitates their easy trade between EU countries.
- 5.3.2 In order to continue trading in the EU, UK manufacturers would have to conform to EU product safety and product standards. It is, therefore, likely that UK businesses will have to continue to comply with certain legislation, such as employment and health and safety regulations, in order to maintain export stability. In the longer term, the UK may opt for a more flexible legislative and regulatory framework, which is independent of the EU, but the importance of EU regulation and compliance for trade globally, not only with other EU member states, should not be understated.

5.4 Workforce

- 4.4.1 As with agriculture, manufacturing is reliant upon EU labour – up to 60% EU migrant labour in some sectors, such as the poultry meat industry. Sector-wide in the UK,

³¹ House of Commons Library (2018) *Briefing Paper Number 7851: Statistics on UK-EU trade*

³² CBI (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*

³³ Tait Walker (2016) *How will Brexit affect the manufacturing sector?*

between April 2016 and March 2017, the Office for National Statistics reported that 10.9% of the workforce were non-UK EU nationals³⁴.

- 4.4.2 A survey conducted by the Confederation of British Industry in 2016 found that nearly two-thirds of manufacturing companies surveyed anticipated recruitment problems in the immediate future. This mirrors an Engineering Employers' Federation (EEF) survey in which two thirds of manufacturers cited a lack of technical skills among applicants and almost as many, 64%, said there was an insufficient number of candidates.
- 4.4.3 Underlying the need for EU workers in manufacturing in the UK is a long-standing skills gap, rooted in disparities between the skills provided by education/training and those required by employers³⁵. A report presented at the National Manufacturing Debate in 2017, an annual conference for the manufacturing industry, listed shortages in technical skills such as robotics, artificial intelligence, software, data analysis, and electrical/electronic engineering. Responding to these shortages is the common practice of moving highly-skilled engineers at short notice across the EU, which would cease if there is an end to freedom of movement.
- 4.4.4 Furthermore, Brexit may result in the movement of manufacturing away from the UK. The increased reliance upon UK workers could lead to higher wages as UK workers generally expect to be paid more than their EU counterparts and companies may choose to move their operations abroad where labour costs are lower.
- 4.4.5 Skilled workers, mainly from the EU, are seen to have been key to the strength of, for example, UK pharmaceutical research and development³⁶. Restricted freedom of movement may encourage companies to relocate to an alternative EU country with easier access to EU labour, and the UK may become a less attractive destination for highly-educated EU workers.

5.5 Funding and investment

- 4.5.1 EU funding is integral to maintaining a dynamic and innovative manufacturing sector in the UK. In 2015, the majority (68%) of research and development expenditure in the UK was channelled to manufacturing³⁷. A number of specific schemes have benefitted the sector and driven innovation. Between 2007 and 2013, €7 billion was granted to the UK as part of the EU Framework Programme 7 (FP7), €1.2 billion of which was used to support around 10,000 companies (with the majority used for education/training). Under Horizon 2020, the UK was the second largest recipient of funding of all EU countries, totalling €1.8 billion, with 22% directed to businesses.
- 4.5.2 Losing access to these funds may damage UK manufacturing's long-term vibrancy and competitiveness. The extent to which any transitional arrangements and/or future funding programmes will replicate them is unclear. In the face of these uncertainties, UK multinationals may move their research projects outside the UK to ensure continued access to funding streams or change their lead team and international firms may be increasingly reluctant to invest in research and development projects in the UK.
- 4.5.3 Foreign investment also maintains the health of the sector. Manufacturing receives a relatively low share of foreign direct investment (FDI); however, it is vital to boosting productivity through efficiency improvements and the development of new products.

³⁴ Office for National Statistics (2018) *UK and non-UK people in the labour market: estimates of labour market activity by nationality and country of birth*

³⁵ Engineering Employers' Federation (EEF) (2016) *Skills Report 2016: An up-skill battle*

³⁶ Bruegel (2017) *Pharmaceutical industry at risk from Brexit*

³⁷ CBI (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*.

Lower levels of investment would, therefore, diminish potential future productivity gains³⁸.

6. Construction

6.1 Background

- 6.1.1 The construction sector is strong and diverse in Norfolk and Suffolk, comprising the general construction of buildings and infrastructure and to the more specialised construction and engineering activities of the energy sector, comprising offshore wind, oil and gas.
- 6.1.2 A number of the County's larger construction firms are based in Great Yarmouth – including Derrick Services (UK), East Coast Pipe and Fittings, CLS Global Solutions, Gardline Shipping and 3Sun Group. Construction accounts for around 1,750 jobs in the Borough (4.5% of the local workforce)³⁹.

6.2 Trade

- 5.2.1 Trade is not the most significant aspect of Brexit impact in the construction sector. According to the Federation of Master Builders, only 25% of construction materials are imported. Nevertheless, the EU is an important trading partner. According to a 2010 study conducted by the Department of Business Skills and Innovation⁴⁰, the EU is the origin of 64% of imports and destination for 63% of exports in building materials. Furthermore, of the top four countries from which the UK imports (Germany, China, Italy and Sweden), three are in the EU⁴¹.
- 5.2.2 Loss of access to the single market would have a significant impact on the industry. If duties or complex restrictions were placed on materials, this may cause shortages or delays in importing and exporting essential resources. Consequently, materials will become more expensive, increasing the cost of construction, affecting both construction companies and those who use their services. The weakness of the pound has already contributed to increased material costs⁴².

6.3 Regulations

- 6.3.1 Regulatory change following Brexit may be of less concern. EU law has minimal presence in the construction sector. Instead, its regulatory framework is a combination of UK and EU-directed legislation. Areas of regulation where the EU is influential include working conditions, climate and the environment, health and safety, and import standards. In many cases, the UK chooses to conform to EU standards. For legislation relating to construction materials, continued compliance will be necessary to maintain ease of trade. It is unlikely that altering construction legislation and standards will be a priority.
- 6.3.2 In some instances, EU directives have been fully integrated into UK law. The most significant of which are Construction Design and Management (CDM) Regulations and Energy Performance of Buildings (e.g. EPC certificates). The repeal or dilution of EU directives is possible in the long term. If the UK were to establish its own domestic policy, this could reduce the costs associated with complying with EU directives.

³⁸ Beck, M. (2016) *Brexit and FDI. Economic Outlook*, 40(2), 26-30

³⁹ Office for National Statistics, 2017

⁴⁰ Designing Buildings (2017) *What does Brexit mean for construction?*

⁴¹ Shepherd & Wedderburn (2016) *Brexit Analysis Bulletin: Construction and Infrastructure*

⁴² Scape Group (2017) *The impact of Brexit on construction sector laid bare*

6.4 Workforce

- 6.4.1 The construction sector is highly dependent upon the free movement of workers from the EU. Both unskilled and skilled positions are filled by EU nationals; Office for National Statistics data demonstrates that these accounted for 8.8% of the workforce between April 2016 and March 2017, putting considerable stress on the sector should restrictions be placed on freedom of movement.
- 6.4.2 The main reason for the reliance on skilled EU workers, who are typically from Eastern European countries⁴³, is the failure to recruit from the domestic market due to a significant skills shortage within the sector⁴⁴. Restrictions on migration are likely to have broad implications for construction. Firstly, it may impact wages and costs. The increased demand for skilled workers may drive up wages (as much as 15-20%), resulting in higher project cost). If labour demand supersedes supply, project costs may increase, eventually impacting the fulfilment of housing targets. Higher material import costs and labour costs are forecast to cost the sector £570 million⁴⁵, nationally.
- 6.4.3 Secondly, it may have implications for the productivity and dynamism of the sector. A weaker workforce may reduce the capacity of house builders, further contributing to an increase in costs. Another impact may be that a lack of skilled labour results in project delays. Uncertainties over workforce numbers have already begun to impact companies' willingness to bid for future projects⁴⁶.
- 6.4.4 More optimistically, UK workers may benefit from reduced competition for jobs and access to larger selection of roles within the industry. Without migrant workers to fill vacancies, an immediate and critical skills shortage may actually fuel investment in training and upskilling.

6.5 Funding and investment

- 6.5.1 Construction is considered to be one of the largest beneficiaries of EU funding. It is funded both by the European Investment Bank (EIB) and European Investment Fund (EIF) and has access to the European Structural Investment Fund (ESIF), European Regional Development Fund (ERDF) and Joint European Support for Sustainable Investment in City Areas (Jessica).
- 6.5.2 In 2015, the EIB and EIF together invested €7.8 billion in UK infrastructure projects⁴⁷. This is important for construction, as much of the sector is involved in the engineering, construction and design of infrastructure projects. These institutions also lent €665.8m to SMEs in 2015.
- 6.5.3 The Confederation of British Industry asserts that future sustainability of funding is of vital importance to the sector's continued success, particularly for infrastructure projects and regeneration projects and may also impinge on the ability of start-ups to emerge and thrive in the market. Existing UK contributions to these funds could be directed to infrastructure projects, but there is an inherent risk that projects may receive funding for political reasons rather than based on merit, value for money or wider strategic benefit.
- 6.5.4 There is some evidence that, in the short-term, the weak pound has attracted international investment but, in the long term, the construction sector would suffer

⁴³ Fisher Scoggins Waters (2016) *How Could a Brexit Affect the Construction Industry?*

⁴⁴ Eversheds-Sutherland (2016) *Brexit and the implications for UK construction*

⁴⁵ Scape Group (2017) *The impact of Brexit on construction sector laid bare*

⁴⁶ CBI (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*

⁴⁷ CBI (2016) *Making a success of Brexit: A whole-economy view of the UK-EU negotiations*

from any subdued private investment climate, post-Brexit. Of particular concern is a reduction in foreign investment in commercial and residential development.

- 6.5.5 Savills predicts a 30-40% decline across the country in commercial developments over the next five years. Infrastructure projects will also be impacted. A study conducted by Ernst & Young concluded that Brexit has reduced the UK's long-term attractiveness to foreign investment and that this is likely to cause an economic slump in the industry⁴⁸.

7. Tourism

6.1 Background

- 7.1.1 Great Yarmouth has been largely successful in maintaining its core tourism industry despite changes to the market since the advent of affordable air travel. As a holiday destination for generations, Great Yarmouth is now the third largest seaside resort in the UK. Tourism is worth £625.6m to the Borough's economy and supports 9,191 FTE jobs, equivalent to 35.5% of the workforce⁴⁹. Approximately one third of visitor spend is on food and drink, a quarter on shopping and a fifth on accommodation.
- 7.1.2 Traditional tourism remains a bedrock of the economy and, alongside the current stakeholder-led exercise to update its Tourism Strategy, the Town is actively exploring ways to make its 'offer' more coherent for residents, potential residents, tourists and investors, acknowledging the need to distil and communicate the cultural vision and opportunities on offer and promote what makes the place special in a crowded marketplace. Such an approach could increase visitor numbers, their length of stay and per capita spend and encourage private sector collaboration and ownership to grow the local economy.
- 7.1.3 Funding and investment in relation to the tourism sector is not considered in this analysis.

7.2 Trade

- 7.2.1 ABTA reports that travel and tourism grew by more than four times the rate of the wider UK economy last year, boosted by more domestic breaks being taken and the weak pound attracting more inbound tourists⁵⁰. The World Travel & Tourism Council (WTTC) reports that British holidaymakers are increasingly opting to stay at home on 'staycations', with outbound tourist departures from the UK growing by only 2.5% – compared to 7.8% in 2016 and 9.9% in 2015 – and a 5.8% year-on-year increase in UK domestic travel⁵¹.
- 7.2.2 The local tourism sector could be boosted by a number of Brexit-related factors, each of which might act to stimulate demand for visits and 'staycations' and depress demand for overseas holidays, namely a) weaker global sterling exchange rates, b) disruption to overseas travel caused by increased customs/border controls, and c) any significant long-term negative impact on the UK economy and levels of disposable income.

⁴⁸ Ernst & Young (EY) (2018) *Inward investment after Brexit*

⁴⁹ Destination Research (2018) *Economic Impact of Tourism: Great Yarmouth, 2017*

⁵⁰ The Association of British Travel Agents (ABTA) (2018) *Making a success of Brexit for travel and tourism priorities for the Brexit negotiations*

⁵¹ World Travel & Tourism Council (WTTC) (2018) in conjunction with Oxford Economics, cited by TravelWeekly.co.uk

7.3 Regulations

- 7.3.1 ABTA proposes that restrictive EU rules currently inhibit the ability of the UK Government to support new domestic air routes⁵². Withdrawal from the EU could, therefore, open up new UK routes, resulting in a boost to accessibility and the value of domestic tourism, locally. Continued inclusion of the UK in EU aviation agreements will, however, be vital if the UK is to continue to access to high-spending EU markets and maintain affordable European travel for residents.
- 7.3.2 Section 7.3 makes reference to European Health Insurance Card (EHIC). The loss of reciprocal healthcare arrangements may impact negatively upon tourism from EU states.

7.4 Workforce

- 7.4.1 Generally, the UK hospitality sector is highly reliant on EU nationals, with between 12.3% and 23.7% of the sector's workforce made up of EU migrants⁵³. Between 2011 and 2016, the number of migrant workers in the hospitality and tourism sector has increased by 27%, with the majority of this increase coming from other EU countries⁵⁴.
- 7.4.2 KPMG estimates that the hospitality sector currently requires 62,000 EU migrants per annum to be able to maintain current activities and to grow⁵⁵. Within the accommodation and hospitality sector specifically, 13.2% of workers are EU nationals. With the exception of the events industry, since 2011 all hospitality industries have seen an increase in the number of non-British workers making up their workforce⁵⁶.
- 7.4.3 In terms of labour supply, the most acute occupations to fill continue to be front-of-house staff (reported by 45% of employers with hard-to-fill vacancies) and chefs (reported by 36% of employers with hard-to-fill vacancies). In future, it may be more difficult to recruit chefs, for example, because current 'Tier 2' visa restrictions for skilled occupations mean that a chef from the EU would need to be earning £30,000 per annum, whereas the median annual salary for a chef is around £17,483⁵⁷.
- 7.4.4 Any restrictions on recruiting EU nationals as a result of the UK's exit from the EU is likely to have an adverse impact on the workforce and it will take time for businesses to adjust to the restrictions in order to sustain capacity and meet growth projections for the sector.

⁵² The Association of British Travel Agents (ABTA) (2018) *Making a success of Brexit for travel and tourism priorities for the Brexit negotiations*

⁵³ Local Government Association (2018) *The impact of Brexit on tourism and creative industries: briefing to the House of Commons, 17 April 2018*

⁵⁴ Office for National Statistics (2016) *Labour Market Statistics time series dataset (LMS)* cited by People1st.co.uk

⁵⁵ British Hospitality Association (2017) *Labour Migration in the hospitality sector*

⁵⁶ People1st (2017) *Migrant workers in the hospitality and tourism sector and the potential impact of labour restrictions*

⁵⁷ Office for National Statistics (2015) *Annual Survey of Hours and Earnings 2015*, cited by People1st.co.uk

8. Health and social care

8.1 Background

- 8.1.1 Health accounts for around 8,000 jobs in the Borough (20.5% of the workforce)⁵⁸. Brexit has implications for health, social care and the caring professions, which are highly reliant upon EU nationals.
- 8.1.2 The King's Fund, an independent health charity founded by Edward VII and chaired by Sir Christopher Kelly has compiled a precis of the key issues, noting that, whilst the impact on health and social care services of leaving the EU is impossible to forecast, the Referendum ushered in a period of significant economic and political uncertainty at a time when the health and care system is facing huge operational and financial pressures.
- 8.1.3 Some areas of the The King's Fund analysis have been omitted because they have fewer overt implications for the Borough: competition law, the working time directive, research.

8.2 Workforce

- 8.2.1 The policy of freedom of movement and mutual recognition of professional qualifications within the EU means that many health and social care professionals currently working in the UK have come from other EU countries. This includes nearly 62,000 (5.6%)⁵⁹ of the NHS England's 1.2 million workforce and an estimated 95,000 (around 7%)⁶⁰ of the 1.3 million workers in England's adult social care sector⁶¹. The proportion of EU workers in both the NHS and the social care sector has been growing over time, suggesting that both sectors have become increasingly reliant on EU migrants.
- 8.2.2 The NHS is currently struggling to recruit and retain permanent staff, with particular gaps in nursing, midwifery and health visitors⁶². Similar problems exist in the social care sector, which has an estimated vacancy rate of 6.6% and an overall turnover rate of 27.8% (equating to around 350,000 people leaving their job each year)⁶³.
- 8.2.3 Until the UK leaves the EU, the policy on freedom of movement remains unchanged. One of the main priorities in the first phase of the UK's negotiations with the EU has been clarifying the status of EU citizens currently living in the UK and of UK citizens living in other EU countries, and the Prime Minister has committed to ensuring that EU citizens will be able to stay in the UK⁶⁴.
- 8.2.4 The number of nurses and midwives from Europe leaving the Nursing and Midwifery Council's register between October 2016 and September 2017 increased by 67% compared to the 12 months before, while the number joining it fell by 89%⁶⁵. It is not,

⁵⁸ Office for National Statistics, 2017

⁵⁹ Data presented on a headcount basis, excluding approximately 80,000 staff with no nationality recorded. Data excludes GPs and GP practice staff as data on the nationality of these staff groups is not collected. Data on the country where GPs gained their primary medical qualification is available at NHS Digital.

⁶⁰ Data represents posts in local authority and independent sector employers only. Excludes posts in NHS and personal assistants.

⁶¹ NHS Digital, 2017; Skills for Care, 2017

⁶² National Audit Office (2016) *Managing the supply of NHS clinical staff in England*

⁶³ Skills for Care, 2017

⁶⁴ Prime Minister's Office (2017) *PM's open letter to EU citizens in the UK*; Home Office et al. (2017) *Settled and pre-settled status for EU citizens and their families*

⁶⁵ Nursing and Midwifery Council (2017) *Increasing number of nurses and midwives leaving profession 'highlights major challenges faced by health and care sectors'*

however, possible to definitively attribute these changes to the outcome of the Referendum; whilst Brexit has the potential to compound workforce pressures, the recruitment and retention problems being experienced in health and social care predate the decision to leave the EU.

- 8.2.5 In September 2018, the Migration Advisory Committee⁶⁶ published its final report on EEA migration in the UK. The report states that, if free movement ends and the 'Tier 2' scheme (visas for 'skilled workers' from outside the EEA with a job offer in the UK) is extended to EEA citizens, the salary threshold at £30,000 should be retained and the list of eligible occupations should be expanded to allow employers to hire migrants into medium-skills jobs. The report does not recommend an explicit work migration route for low-skilled workers, except for a seasonal agricultural workers scheme.
- 8.2.6 Recent estimates suggest that both the health and social care sectors will face a considerable shortfall in staff in future if EU migration is limited after Brexit. Modelling from Department of Health projects (under a worst-case scenario)⁶⁷ a shortage in the UK of between 26,000 to 42,000 nurses (full-time equivalents) by 2025/26⁶⁸.
- 8.2.7 Projections from the Nuffield Trust suggest a shortfall in England of as many as 70,000 social care workers (headcount) by the same date⁶⁹. Staff groups likely to be affected include lower-skilled workers, particularly in social care. With just under a quarter of EU nationals working in what are classed 'elementary occupations' (including jobs such as cleaners and waiters)⁷⁰ it is likely that in future both NHS and social care providers will face increased competition from other industries, such as retail, when trying to recruit lower-skilled staff.
- 8.2.8 There are concerns at various levels, not only in highly-skilled sectors, but in the vast body of healthcare assistants that make up a large portion of the NHS workforce. Jean McHale, Professor of Health Care Law at the University of Birmingham notes that "there is a longer-term question about NHS staffing, because the NHS is reliant, as is social care, on individuals coming from other member states to help and provide healthcare services ... now there's a real concern about what will happen with access to things such as visas."

8.3 Accessing treatment here and abroad

- 8.3.1 Currently, EU rules govern UK citizens' access to health and care in the EU, and EU citizens' access to UK services. EU citizens are entitled to a European Health Insurance Card (EHIC) which gives access to medically necessary, state-provided health care during a temporary stay in another EEA country⁷¹. The cost of treatment under these schemes can be subsequently reclaimed from the visitor's country of

⁶⁶ Migration Advisory Committee (2018) *EEA migration in the UK: Final report* (commissioned by the Home Secretary)

⁶⁷ This scenario assumes that all EU and non-EU inflows of nurses and midwives would stop after changes to immigration rules. Shortage is compared to the forecast base case supply.

⁶⁸ Lintern (2017) in *The Health Service Journal*

⁶⁹ Dayan/Nuffield Trust (2017) *Getting a Brexit deal that works for the NHS; based on EU migration ending in 2019*

⁷⁰ Office for National Statistics (2017) *International immigration and the labour market, UK: 2016*

⁷¹ A valid EHIC entitles people to access state-provided treatment that is medically necessary during a temporary stay in another European Economic Area (EEA) country or Switzerland. Treatment is provided on the same basis as it would to a resident of that country, either at a reduced cost or for free. For example, some countries require patients to contribute a percentage towards the cost of their treatment, known as a patient co-payment.

residence via reciprocal health care agreements. Around 27 million people currently hold European Health Insurance Cards issued by the UK⁷².

- 8.3.2 In addition, under EU rules, people who come from elsewhere in the EU to live in the UK, or who leave the UK to live in another EU country, have access to health care on the same basis as nationals of that country. Estimates of the number of people this involves differ among the available sources. However, it has been suggested that there are around one million British migrants living in other EU countries, compared with around 3 million EU migrants living in the UK⁷³. While the UK is a member of the EU, the rights of EU nationals already living in the UK and UK nationals living in the EU remain unchanged.
- 8.3.3 Future arrangements, including those relating to EHICs or the rights of UK and EU nationals to access health care when moving abroad in the future have, at the time of writing, not been resolved. However, the UK has said that it intends to seek an ongoing arrangement 'akin to the EHIC scheme' as part of negotiations on future arrangements with the EU⁷⁴. This will obviously be subject to negotiation.

8.4 Regulation

- 8.4.1 EU legislation provides a harmonised approach to medicines regulation across the EU member states. The Government has previously stated that it would seek continued membership of the European Medicines Agency (EMA) – the centralised medicines authorisation system – after Brexit, and that it would be prepared to pay to do so. The EMA subsequently announced the closure of its headquarters in London and relocation to Amsterdam, with the loss of 900 jobs.
- 8.4.2 The EMA is responsible for the scientific evaluation of human and veterinary medicines developed by pharmaceutical companies for use in the EU. Under current arrangements, companies can submit a single application to the EMA to obtain a marketing authorisation that is valid in EU, EEA and European Free Trade Association (EFTA) countries. Being a member of the EMA also gives the UK 'Tier 1' market status, meaning that pharmaceutical and device companies prioritise the UK as a market for launching their products.
- 8.4.3 The UK has its own national regulatory agency, the Medicines and Healthcare products Regulatory Agency (MHRA). However, this deals with national authorisations intended for marketing only in the UK. The EMA cut the UK's Medicines & Healthcare Regulatory Agency out of its contracts seven months ahead of Brexit (it previously accounted for 20-30% of all pharmaceutical evaluations in the EU).
- 8.4.4 It is assumed that the intention would then be for the MHRA to operate as a sovereign regulator outside the EMA, but with regulatory equivalence and working closely with the EMA and other international partners. There are already precedents for such arrangements – the EMA currently co-operates with regulatory bodies around the world and has specific agreements in place with countries including the United States, Canada and Switzerland.
- 8.4.5 It is possible, however, that if the UK leaves the EMA arrangements and develops its own drug approval system, the UK may lose its 'Tier 1' status and end up at the back of the queue for new medicines⁷⁵. For example, in Switzerland and Canada, which

⁷² Fahy et al. (2017) in The Lancet

⁷³ Department for Exiting the European Union (2017) *Providing a cross-border civil judicial cooperation framework - a future partnership paper*

⁷⁴ Department for Exiting the European Union (2017) *Providing a cross-border civil judicial cooperation framework - a future partnership paper*

⁷⁵ Rawlins (2017) to the House of Lords Select Committee on Science and Technology

have separate approval systems, medicines typically reach the market six months later than in the EU⁷⁶.

- 8.4.6 The UK faces a similar issue in relation to future access to medical radioactive isotopes, which are used in the diagnosis and treatment of cancer. In 2016/17 the NHS performed more than 592,000 diagnostic procedures that rely on radioactive material⁷⁷. The European Atomic Energy Community (Euratom) creates a single market for nuclear energy in Europe and is responsible for co-ordinating and regulating access to these materials. The Government has stated that when the UK leaves the EU it will also leave Euratom⁷⁸, although it hopes to continue working closely with it in future.
- 8.4.7 Although the government has stated that the UK's exit from Euratom will not have an impact on the availability of radioactive materials, many are concerned about the impact on future supply, including increased costs and a risk to patients should access be disrupted⁷⁹.
- 8.4.8 Clinical trials for new drugs are currently carried out on a national level but subject to EU regulations, including for registration of trials. A revised EU clinical trials directive harmonises arrangements across the EU with the aim of creating a single entry point for companies that wish to carry out trials of new drugs on participants in different countries.
- 8.4.9 Some in the pharmaceutical industry have expressed concern that leaving the EU could result in the UK losing out on some trials that might otherwise benefit patients, as the UK would no longer be part of the harmonised procedure. These trials are particularly important for rare diseases and personalised medicine, as multi-country trials provide researchers with access to the large populations required.

8.5 Public health

- 8.5.1 NHS Providers – which represents acute, ambulance, community and mental health services within the health service – has raised concerns about preventing the spread of diseases without proper coordination, as well as shortages of medicines and supplies and a lack of “contingency planning” in case of a no-deal Brexit. The Health Secretary has written to NHS and social care organisations, advising that there is no need for alarm or to stockpile medicines, appearing to contradict a separate statement to the House of Commons Health Select Committee that “we are working with industry to prepare for the potential need for stockpiling in the event of a *no deal* Brexit”.
- 8.5.2 Public health legislation for a number of policy areas, in particular food safety and nutrition, tobacco, alcohol, radiation, environment, housing standards and chemicals in air, water and land safety, is drawn from established EU legislation, standards and regulations, with relevant directives transposed into UK legislation.
- 8.5.3 EU legislation has had a significant impact in some areas, such as air quality, that cannot be successfully controlled at national level alone. In other areas, such as

⁷⁶ Fahy et al. (2017) in The Lancet

⁷⁷ NHS England (2017) Diagnostic Imaging Dataset 2016-17 Data; this count includes procedures under nuclear medicine, PET-CT scans and SPECT scans

⁷⁸ Department for Exiting the European Union (2017) *Nuclear materials and safeguards issues – position paper*

⁷⁹ British Nuclear Medicine Society (2017) *British Nuclear Medicine Society statement on leaving Euratom*; Strickland (2017) *Royal College of Radiologists statement on the potential impact of leaving the Euratom treaty*

tobacco control, the UK currently leads the way in Europe, having gone further than required by a recent EU directive, by introducing standardised packaging⁸⁰.

- 8.5.4 When the UK leaves the EU, it will have the opportunity to consider whether transposed legislation should be maintained or amended. Whilst the Government has not yet clarified its intentions on this issue, some have expressed concern⁸¹ that, once EU oversight is removed, the UK could set less stringent standards in relation to some areas. On the other hand, decision-making in a community of 28 countries can be cumbersome and slow. If the political vision and will existed, the UK could choose to take bolder and faster action on public health after leaving the EU⁸².

8.6 Funding and investment

- 8.6.1 In the long term, the performance of the wider UK economy will be one of the most important influences on funding for the NHS and social care. With negotiations over the UK's exit from the EU in progress, it is difficult to predict the economic outlook with any certainty. However, a range of independent economic forecasts suggest that Brexit is set to have a significant long-term negative impact on the UK economy, placing additional pressure on public finances⁸³.
- 8.6.2 If lower growth in public spending follows, then the implications for both the NHS and social care would be significant, particularly given existing pressures in both sectors. Much will depend on the UK's future trading relationships.
- 8.6.3 The Government has stated that the UK will exit both the single market and the customs union after it leaves the EU, although it has proposed a time-limited implementation period following departure, to allow businesses time to adjust and new systems to be put in place. However, beyond that the situation remains unclear, although the Government has said it will be pursuing "the freest and most frictionless trade possible in goods between the UK and the EU", as well as hoping to forge new trade relationships around the world⁸⁴.
- 8.6.4 In the event of a *no deal* Brexit, the UK will fall back on World Trade Organization (WTO) rules, which could see specific tariffs being imposed on some goods and services. In addition to any wider economic implications, this could increase the cost of many goods and services for the NHS and social care sector, and could also impact on supply, including of drugs and treatments.
- 8.6.5 Pharmaceutical companies and industry bodies have publicly expressed concern about the potential consequences of this scenario. European and UK supply chains of medicines and medical technologies are profoundly integrated, meaning that any new tariff agreements or inspections could cause significant disruption to the supply of medicines to patients, particularly those that are time- and temperature-sensitive, such as cutting-edge cell and gene therapies⁸⁵.

⁸⁰ Joossens and Raw (2017) *Tobacco control scale: monitoring the implementation of tobacco control policies systematically at country-level across Europe*

⁸¹ Creagh (2017) *Funding a healthy future*. Chartered Institute of Public Finance & Accountancy; Fahy et al. (2017) in *The Lancet*

⁸² Faculty of Public Health, 2016

⁸³ Bank of England (2017) *Inflation Report*; OECD (2018) *United Kingdom economic forecast summary*; Office for Budget Responsibility (2017) *Economic and fiscal outlook*

⁸⁴ HM Treasury et al. (2017) *Future customs arrangements – a future partnership paper*

⁸⁵ UK Parliament (2017) Written evidence from the Association of the British Pharmaceutical Industry and the BioIndustry Association; written evidence from AstraZenica

9. Concluding remarks

9.1 Introduction

- 9.1.1 Although considerable uncertainty remains on the specific outcomes of Brexit whilst the UK Government negotiates the terms of its departure from the EU, the research and commentary identifies a set of challenges and potential opportunities for Great Yarmouth. The following points are presented to summarise Brexit's impact on workforce, regulations, trade, funding and investment.

9.2 Workforce

- 9.2.1 Arguably the most significant impact of Brexit will be on the local labour force. There is no absolute certainty that non-UK EU nationals currently residing in the UK will be entitled to stay. Recent evidence suggests that many may wish to relocate, as the UK is perceived to be less desirable. In the long-term, it is highly likely that migration from the EU will drop. Moreover, Brexit will impact low and high skilled workers in different ways.
- 9.2.2 In October 2018, the Institute for Fiscal Studies (IFS) asserted that men with few qualifications are most at risk of losing their jobs and struggling to find work if new barriers to trade emerge; men with GCSE qualifications or below are more likely than other groups to work in industries at extreme risk from new trade barriers after Brexit. 14% of UK workers, or 3.7 million, are in industries that the IFS classify as "very highly exposed", estimating that these sectors could lose more than 5% of their value in the event of a *no deal* Brexit.
- 9.2.3 This should be viewed in the context of the Borough; in education, skills and training, Great Yarmouth ranks bottom out of 326 local authority areas. GCSE achievement is below the national and county averages with 56.5% of local school children achieving 5 GCSEs graded A*-C in 2015, compared to 63% in England and 61.4% in Norfolk. Borough residents are, therefore, likely to be amongst those most vulnerable to the effects of Brexit, in terms of employment opportunities and economic inclusion.
- 9.2.4 In June 2018, a survey cited by The Independent⁸⁶ concluded that 90% of employers are struggling to find the staff they need and two-thirds believe the skills gap will either fail to improve, or get worse post-Brexit. Lower skilled EU workers often fill vacancies in agriculture, manufacturing and construction, many of which are seasonal or temporary, and therefore are difficult to fill domestically. This issue may be of particular significant in the Borough, with its seasonal economy and employment opportunities.
- 9.2.5 In the future, there is an opportunity for these sectors to uplift the economy, as innovation could lower labour intensity by transforming a high number of low skilled, low paid jobs into higher skilled, better paid jobs.
- 9.2.6 Local partners – including the Borough – should take the opportunity to develop a local industrial strategy that further reinforces sectoral specialisms and to ensure that central Government is fully aware of the contribution that those specialisations make to the national economy. Many of these sectors have similar requirements (e.g. for technical skills, leadership skills, new technologies and easier-to-access funding and partnerships for smaller scale commercial research and innovation) and many face global opportunities for new markets and new products (e.g. clean energy).
- 9.2.7 This will require more in-depth work in order to provide ongoing critical insights into the local business base, including the specific needs of individual businesses and how the Borough can work with them. For the Borough and central government, it will

⁸⁶ The Independent (2018) *The Brexit effect: How the last two years have impacted the economy*

be vital to have a more accurate understanding of key indicators and of business health and where the challenges and opportunities lie.

- 9.2.8 Many higher skilled professionals from the EU work in offshore wind and advanced manufacturing due to a shortage of STEM skills in the UK labour market as a whole. As with the lower skilled jobs, it is crucial to retain these workers. This may be challenging because, on the one hand, these are highly mobile workers who can easily find good jobs in other European countries, and, on the other hand, there might be increased costs for businesses to employ overseas workers (as is currently the case for non-EU workers).
- 9.2.9 Local government and New Anglia LEP could support local businesses in retaining their skilled workers, while working with companies and education and training providers to ensure that STEM skills provision aligns with local skills demand. As the labour market continues to tighten and, if migration continues to slow, there would be a strong case for focussing and strengthening place marketing and inward investment in order to reach out to the people that the Borough needs to attract and retain as well as the investment needed to drive productivity.

9.3 Regulations

- 9.3.1 Leaving the EU provides the UK the opportunity to formulate its own regulatory regime, which in many industries has been EU-directed over the past several decades. This can be made more in accordance with UK-specific concerns and objectives, and may unlock increased investment. Any dilution of existing safeguards and protections is, however, likely to be deeply unpopular.
- 9.3.2 The standardisation of regulations across the EU with many EU directives incorporated into UK law means that regulatory alignment and stability will be important across the sectors to maintain 'business as usual', easing trade and ensuring continued access to international funding. Consequently, in order to remain competitive, the UK is likely to have to continue conforming to many EU laws, policies and regulations.
- 9.3.3 The relationship between regulation and trade is particularly pertinent in manufacturing, due to the importance of product standards. It is no surprise that companies may be anxious about regulatory changes following Brexit and they will need to remain aware of any regulatory changes and how they may impact them.

9.4 Trade

- 9.4.1 The future environment and conditions for trade after the UK leave the European Single Market are still very uncertain; negotiations on trade are ongoing. Their resolution will need to precede the potentially enormous task of negotiating new trade deals with non-EU partners. Outside of the single market, the introduction of trade barriers, such as tariffs, is likely to impact UK exports.
- 9.4.2 As outlined in *Section 6.2.2*, tourism presents a potential opportunity because the sector could be boosted by a number of Brexit-related factors, including an increase in demand and any opening up of new UK air routes.
- 9.4.3 Although most goods produced in Norfolk and Suffolk are sold in the UK market, tariffs will impact entire supply chains, affecting most manufacturing activities as well as construction, as various components and materials across the supply chain are traded with EU partners. For example, duties or restrictions placed on imports may cause shortages of materials, increasing costs in construction, which in turn will impact the entire region's economy. In this context, it is vital for the region that the UK Government achieves a favourable trade deal with the EU after Brexit.

- 9.4.4 In October 2018, the Chief Executive of the Road Haulage Association (RHA) stated that, “if we are out of the customs union ... we think the likelihood is that [France] will apply a customs process in Calais, in which case we are going to have tailback back into Kent and beyond”. This echoes comments by the Chairman of Maritime UK in March, who stated that his preferred approach was to, “find a solution where we can use existing infrastructure and lorries don’t have to stop because there would be chaos here and there would be reciprocal chaos across the Channel”.
- 9.4.5 The theme was also picked up by the Chief Executive of the British Ports Association, who commented that, “the UK’s post-Brexit customs relationship with the EU will dictate how almost half of our trade is handled at the border. For the UK’s roll-on-roll-off ferry ports, which facilitate the majority of this traffic, the implications are particularly significant as the process for enabling tens of thousands of HGVs each day to pass through UK and European ports has still yet to be agreed. For this sector, new frontier checks could have a major impact on UK ports as well as add additional delays and costs for UK trade.”
- 9.4.6 Food prices, notably prices of dairy products could rise and food supplies could become less secure in the event of a *no deal* Brexit⁸⁷. The UK produces less than 60% of the food that it consumes. Of the remaining 40%, about three-quarters is imported directly from the EU, including a lot of fresh fruit and vegetables like citrus fruits, grapes and lettuces. These are *just-in-time* supply chains and there is little scope for stockpiling⁸⁸.
- 9.4.7 If there were no EU trade deal agreed, there could be ongoing disruption to existing choices; border delays, caused by sudden customs and regulatory checks, could very quickly lead the distribution system to break down⁸⁹. Whilst the UK has more supermarkets per head than anywhere else in the world, those supermarkets keep very little in stock. Most food enters the UK overnight, much of it through Dover.
- 9.4.8 The Department for Transport has stated that it remains “confident of reaching an agreement with the EU, but it is only sensible for government and industry to prepare for a range of scenarios. Regardless of the outcome of the negotiations, we are continuing to work closely with a range of partners on contingency plans to ensure freight can continue to move as freely as possible between the UK and Europe”.
- 9.4.9 The issue may actually present an opportunity for Great Yarmouth; delays in Dover might result in an uplift in need/demand for its port as an alternative entry point for vessels of up to 30,000DWT (comprising the majority of ocean cargo vessels in the world).
- 9.4.10 The Borough could, conceivably, capitalise upon local maritime connectivity to expand the Port’s current regional focus relating to offshore to position it as a gateway for time-sensitive supply chains and perishables. This might also help drive the resolution of related strategic infrastructure constraints and transition the local area to a more international-facing economy. On 23 October 2018, the Financial Times reported that the Transport Secretary has discussed with government colleagues the possibility of chartering ships, or space in ships, to bring supplies into other British ports in the event of a *no deal* Brexit⁹⁰.
- 9.4.11 There are also uncertainties about intellectual property (IP) protections (particularly trademarks and design protection) as a result of Brexit. Successive governments

⁸⁷ London School of Economics (2018) *The impact of Brexit on the UK dairy sector*

⁸⁸ Food & Drink Federation, 2018

⁸⁹ British Retail Consortium, 2018

⁹⁰ Financial Times (2018) *UK readies flotilla plan for supplies in no-deal Brexit*

have sought to position the UK as a *knowledge economy* and additional work is required to assess the potential impact.

- 9.4.12 Another issue related to cross-border trade with the EU is VAT being charged at the border when importing goods and services, as opposed to current trade which is exempt from VAT. Switching to charging VAT may potentially create cash flow issues for UK firms, as firms will need to pay VAT before they have sold the goods that they are importing.
- 9.4.13 The Borough will inevitably have to adjust economically. This is both a challenge and an opportunity. There is a clear opportunity to increase the UK share of companies' supply chains, and open products to new markets worldwide. The lower value of sterling may make UK exports more competitive, but it is important that local companies innovate and actively enter new markets.
- 9.4.14 As companies often rely on imported inputs in their global supply chains, and because some high-value-added products are less sensitive to price changes, the recent depreciation in sterling has not generated a significant boost in UK exports. Firms appear to be using sterling's weakness to bank increased profits in a time of uncertainty, rather than to move into new markets.
- 9.4.15 There will be some opportunities for collaborating with other regions and sectors elsewhere, where there is a common interest in reaching out to new markets or designing new products. Exploiting new markets and cultivating a competitive advantage requires time, innovation and financing, however.

9.5 Funding and investment

- 9.5.1 The UK is a net contributor to the EU budget overall. EU funding plays, however, a critical supporting role in all of the important sectors in Norfolk and Suffolk. EU funding has been integral to driving the evolution of key sectors through research, development and innovation. EU funding has also been important for investing in large scale infrastructure projects, indirectly supporting businesses and job growth in the construction and offshore wind sectors.
- 9.5.2 There are two local funds that fall under the EU's cohesion policy that are of particular local significance: the European Regional Development Fund (ERDF) and the European Social Fund (ESF). Two further funds, the European Agricultural Fund for Rural Development (EAFRD, under the common agricultural policy, €85 billion) and the European Maritime and Fisheries Fund (EMFF, under the common fisheries policy, €6.5 billion), are specifically targeted at the needs of rural and maritime regions respectively.
- 9.5.3 The majority of local ERDF funding focusses on support for innovation, start-ups and established businesses. ESF is used to support very pressing skills and employability challenges as well as addressing key social inclusion issues that support people into, and progression within, employment and training. EAFRD is used to support complementary activity in rural areas, including support for knowledge transfer and skills, support for micro, small and medium sized rural businesses, tourism activities and small-scale investment into broadband enhancements.
- 9.5.4 European Structural and Investment Funds (ESIF) are designed to improve economic growth, business competitiveness and employment opportunities and social well-being across Member States of the EU. Together they account for 26% of the EU's total budget and are the second largest EU investment fund, after the Common Agricultural Policy.

- 9.5.5 The UK is 11th out of 28 states in terms of ESIF receipts⁹¹. The Government's White Paper on the future relationship does not envisage any continuing UK contribution to the Structural Funds programme after Brexit. The Institute for Fiscal Studies notes, however, that the majority of forecasts of the impact of Brexit on the UK economy indicate that the Government would have less money to spend even if it no longer had to pay into the EU⁹².
- 9.5.6 The Funds are allocated to 38 Local Enterprise Partnerships (LEPs). New Anglia was allocated around £86m (€107.5m) of EU funding for investment in Norfolk and Suffolk. This amount covers three funding programmes: ERDF (£37,700,690), ESF (£35,696,935) and EAFRD (£13,015,876). The Borough has benefited from this funding in two ways:
- a) As a direct beneficiary of EU funding

The *Inclusion Project* (with a value of £684,664, match-funded by ESF) assists the long-term unemployed and economically inactive residents in Great Yarmouth and Gorleston that face complicated challenges and who are most disconnected from community support networks, including the provision of entry-level training, volunteering and work placement opportunities.

Great Yarmouth is also a partner in *Go Trade*, which attracted €3.8m from the EU-funded Interreg *France (Channel) England* programme, which supports football and the overall offer at nine traditional markets across England and France, including special branding, new tourism itineraries and themed events, plus a click-and-collect trial. It supports the Borough's *Town Centre Initiative*, the Council's work to enhance the town centre as a destination where more people choose to live, work, invest and spend their leisure time and money.
 - b) As an indirect beneficiary of EU funding

SMEs within the Borough have benefited from a number of ERDF-funded projects, including Grants4Growth, SCORE, Business Energy Efficiency Anglia, Renewables East and the current New Anglia Growth Programme (which has provided direct technical assistance to around 60 local businesses, distributed around £120K in grant aid and catalysed around £320K investment in growth measures). Many of these incorporate delegated grants schemes, providing a conduit for EU funding directly to SMEs.
- 9.5.7 In 2016/17, the UK received over £5 billion in funding from EU programmes. Much of this went into research, infrastructure and agricultural projects. In the main, this funding will end in 2020, although it is possible that some programmes may go on a little longer. It is also important that local businesses find alternative sources of funding – from Central Government or elsewhere – once they are no longer eligible for EU funding. The UK also receives loans from the European Investment Bank (EIB). The UK will not be eligible for new loans from the EIB after 29 March 2019, when the UK leaves the EU.
- 9.5.8 The UK has stated that it may wish to continue to participate in some of the EU programmes that welcome non-Member States, after 2020. The UK's future participation will be discussed in negotiations over the future EU-UK relationship.
- 9.5.9 Some EU programmes are open to countries that are not EU Member States. For example, the research and innovation programme Horizon 2020 is available to countries that are trying to join the EU, members of the European Free Trade

⁹¹ Institute for Government, 2018

⁹² Institute for Fiscal Studies / Economic and Social Research Council, Centre for the Microeconomic Analysis of Public Policy (2016) *Brexit and the UK's Public Finances*

Association, and those associated to the EU's previous research and innovation programme.

9.5.10 The new UK Shared Prosperity Fund (UKSPF) was announced in 2017 and is intended to replace EU structural funding and focus upon reducing geographical inequalities. No specific details on this Fund have emerged, although initial consultations are underway.

9.5.11 On 4 October 2018, Great Yarmouth Borough Council's Regeneration & Funding Manager attended UKSPF 'pre-consultation' round-tables for around 50 stakeholders from the Greater Southeast and London. It was clear that discussions are at a very early stage with the focus on *structuring, administering and evaluating the new fund and priorities for investment and the needs and opportunities of the regional economy*. Delegates were told expect a formal consultation after the 29 October Autumn Budget, although this does not appear to be underway yet. Observations from the round-tables are as follows:

- *Spatial foci and the UKSPF as an instrument of cohesion/convergence* – there is the possibility (hinted at in the Manifesto) that UKSPF might target lower-performing economies, focusing support on areas such as the Northern Powerhouse or Midlands Engine, rather than pumping money into relatively high-performing economies in order to capitalise upon and drive the latent potential for further growth, high-growth and job creation. Spatial allocation – i.e. regional/subregional ring-fencing – is a key unknown at this stage.
- *Thematic foci* – The LEPs appear to be seen as natural conduits for UKSPF, albeit after the current review of geographic demarcation to reflect functional economic areas is concluded. It seems reasonable to assume, therefore, that the thematic foci will align with the new Local Industrial Strategies, which should be in place by 2020. It's unclear whether or not the LEPs will design/publish Calls or whether they'll take a direct commissioning route, bringing strategies like local infrastructure delivery plans into scope to develop suites of 'products' that target different priorities. Further detail will also be required on the measurement of impacts/outcomes; this could amount to reporting on 'Treasury Net Gain' or other metrics articulated in terms of hard outcomes.
- *Simplification, streamlining and rationalisation* – there seems to be a collective, sympathetic attitude towards this; there may be significant scope for public funding landscape decompartmentalisation (broad-based interventions around job creation, business support, capital and skills are inherently difficult within current frameworks as they'd straddle both ERDF and ESF). The consistency/ambiguity of programme guidance, too, has presented operational issues for ESIF accountable bodies and there may be scope for further process debureaucratisation.
- *Financial ring-fencing* – unlike six-year EU funding operational programmes, which drew upon a strong evidence base and intervention logic and corresponded to empirical need and demand –there may be an inherent risk of fiscal reallocation from UKSPF as central government responds to immediate political imperatives and emerging challenges/opportunities on a reactive basis.
- *Continuity of delivery* – the prospect of funding for a number of economic/social intervention measures coming to an abrupt end at a time when UK plc is most vulnerable to the impact of Brexit is of concern. Perhaps as a result of the awkward transition between the 2007-13 and 2014-20 programmes, all parties seemed to be aware of continuity implications for capacity-building programmes. The Government has provided assurances around Treasury underwriting of contracted projects and the hope seems to be that UKSPF would launch relatively seamlessly after that.

- 9.5.12 It is understood that agricultural funding will be protected, with the Environment Secretary providing assurances that, “the amount we allocate to farming support in cash terms will be protected throughout and beyond this period right up until the end of this Parliament in 2022”. This commitment is UK-wide and includes rural development schemes. The Government envisages an *agricultural transition* from 2020 where current farm payments are maintained but revised and then replaced with new approaches. In England, the Government is consulting on transition options towards a system which pays farmers for *public good*, such as environmental enhancement.
- 9.5.13 The impact of Brexit on UK public procurement has been largely overlooked. There is limited awareness that many of the public contracts issued by contracting authorities as varied as the Ministry of Justice to local authorities, receive significant funding from the EU through programmes like the European Regional Development Fund (ERDF) and European Social Fund (ESF).
- 9.5.14 Since January 2015, £1.6bn of UK public contracts have been awarded with full or partial EU funding, £1.3bn of this in the second half of 2016 (£220 billion overall). If anything, this figure is understated, since it does not include the EU’s financial contribution to government contracts issued through “frameworks”, which are essentially preferred supplier lists around which there is less official disclosure. The sector that is especially dependent on EU investment is education and skills; since 2015, contracts worth £425m with full or partial funding from the EU.
- 9.5.15 Attracting large scale private sector investment in infrastructure and development will require places to further focus their investment marketing activity and develop a very strong place-based story and proposition.
- 9.5.16 Foreign firms have seen the UK as a gateway to other EU markets, with the UK economy benefiting from its resulting attractiveness as a location for activity. Foreign Direct Investment (FDI) is key to raising national productivity, and, by extension, output and wages across all sectors (most significantly in manufacturing). There is evidence that EU membership has significantly increased FDI – the extent to which FDI will be affected by Brexit depends highly on future trading arrangements with the EU.
- 9.5.17 The impacts also vary across sectors. For instance, investment has already declined in manufacturing, whilst investment is likely to slow in commercial and residential development, impacting construction. In the offshore wind sector, there has been a mixed post-Brexit reaction by foreign companies with some continuing to invest whilst others have put investment on hold.

10. Sources of further information

10.1 Business Brexit Checklist

Created and maintained by British Chambers of Commerce to help businesses identify and consider the changes that Brexit may bring and to help them plan at both operational and Board levels: <https://bit.ly/2Oi6JXq>

10.2 Business Brexit Risk Register

Created and maintained by the British Chambers of Commerce to monitor progress against real-world Brexit questions being asked by businesses and where clarity is needed so that firms can plan their trade following the UK’s departure from the EU: <https://bit.ly/2PetOe7>

10.3 The potential implications of Brexit for Norfolk and Suffolk

Commissioned by New Anglia LEP and Norfolk and Suffolk councils to consider the potential impact of Brexit on the local economy, focusing on the potential challenges and opportunities and identifying companies that might be affected: <https://bit.ly/2PsvihR>

10.4 Getting Norfolk ready for Brexit

Published by Norfolk County Council to provide some insight into what the Brexit impacts and opportunities might be – especially for key business sectors – as part of its aim to help and encourage businesses to plan ahead: <https://bit.ly/2QofVHw>

ENDS

Subject: **Tourism and Culture Strategy Development Update**

Report to: **ELT – Monday 5th November 2018**
Economic Development Committee – Monday 19th November 2018

Report by: **Kate Watts – Strategic Director**
Paula Boyce – Head of IT Marketing and Communications

This report provides committee Members with an update of progress on the development a new Tourism and Culture Strategy for the Borough and in doing so, it asks Members to resolve to a number of additional developmental steps being taken with an amended timeline for the completion of the work to April 2019.

To undertake these additional developmental steps Members are asked to allocate £20,000 from the Council's special projects reserve funding.

1. BACKGROUND

- 1.1 On Monday 16th July 2018 Members of Economic Development Committee resolved to create a new Tourism and Culture Strategy for Great Yarmouth.
- 1.2 Since the Council's Economic Development Committee resolved to develop the new Tourism and Culture Strategy, a number of activities have taken place. This report updates Members with progress so far and outlines to Members the next steps in creating what has been recognised by our stakeholders as an important document for the Borough.

2. PROGRESS SO FAR

- 2.1 As part of the development work for this strategy, officers and Members from the Council's Economic Development Committee undertook a study tour in October visiting cultural attractions in both Hastings and Margate. In doing so, the group met with officers, Members and private sector partners in both Thanet District Council and Hastings Borough Council area, learning about the role of each Council in terms of catalysts for investment to add value to and improve the local tourism and cultural offer in each area.
- 2.2 Two stakeholder workshop sessions were planned to provide an opportunity to engage with local stakeholders as part of this work. Unfortunately the first date in August had to be cancelled due to low uptake, but the second workshop took place in September and was well-attended. 40 delegates attended the workshop that was held in September and included a wide range

of stakeholders. Appendix 1 provides a list of organisations represented at September's stakeholder workshop.

- 2.3 The workshop itself included three facilitated sessions and provided an opportunity for everyone to participate and to have their thoughts recorded. The first of the three sessions focussed on identifying what Great Yarmouth had already achieved, a high level summary of this is included below:

- Better showcasing of the Broads within Great Yarmouth
- Community pride
- Clean beaches
- Active preservation of our heritage assets
- Festivals and events
- Track record of grant funding from partners like the Heritage Lottery Foundation and Arts Council

- 2.4 The second session was a Strengths, Weaknesses, Opportunities and Threats analysis with the final session being focussed on developing some initial thoughts about developing a vision and outcomes for the new strategy. In summary the following suggestions were distilled in this session:

- Develop a brand for Great Yarmouth, to include Greater Yarmouth, heritage and the wider demographics of Borough as an area
- Maintain and enhance existing assets and to further improve our heritage assets
- The Borough's offer must be inclusive to all, including businesses, residents, local communities and our partners
- Extend the season further to make it a true all year round offer and develop an evening economy
- Joined-up partnership working is key, strengthened relationships with all stakeholders and work with local people to improve their pride in the Borough

- 2.5 It was clear from this workshop that there is a wealth of interest and excitement from local partners to articulate what it is Great Yarmouth and what the area wants to be known for. The recent workshop demonstrated a real wish from stakeholders to remain involved and together shape the story of the Borough. To do this effectively and ensure maximum involvement from all, officers propose a period of further engagement to develop this strategy, along with a number of additional development steps.

3. NEXT STEPS

3.1 The suggested additional steps for this work are proposed as:

- Provide an output report for delegates of the September workshop
- Plan an additional stakeholder workshop for the New Year to be externally facilitated to develop the vision and objectives for the new strategy
- To procure support to develop the story and brand for the borough to form part of the new strategy
- Explore co-authorship of the proposed strategy with Greater Yarmouth Tourism & Business Improvement Area (GYTABIA), other key partners, the tourism and culture business sector and local community
- Explore funding opportunities linked to a delivery plan for the final strategy

3.2 In undertaking these additional steps the date for a Committee decision for the new Tourism and Culture Strategy would need to be changed to the 1st April 2018.

3.3 To be able to undertake a facilitated workshop and to develop a story and a brand for the borough a budget of £20,000 would be required from the Council's special projects reserve.

4. CONCLUSION

This report provides committee Members with an update of progress in developing a new Tourism and Culture Strategy for Great Yarmouth and in doing so, it asks Members to resolve to a number of additional developmental steps being taken with an amended timeline for the completion of the work to April 2019.

Appendix 1

Organisations represented at the Tourism & Culture Workshop

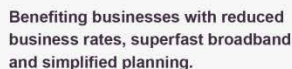
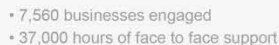
‘Tourism & Culture Strategy for Great Yarmouth’ Stakeholder Workshop - 20 September 2018	
Arts Council England	Broads Authority
Broads Authority	Catalysta
Cator & Co	Celador
Civic Society	Classic Lodge
Classic Lodge	Great Yarmouth Preservation Trust
DIAL	Hippodrome
GYTABIA	Hemsby Parish Council
Great Yarmouth Arts Festival	Knights Court Hotel/Sea Change Arts
Hemsby Parish Council	Martham Parish Council
Hudson Architects	Merrivale Model Village
MAP	Mr Humbug
Martham Parish Council	Norfolk Chamber of Commerce
Norfolk County Council	Norfolk library & Information service
Norfolk Library & Information service	Norfolk Museums Service
Original Projects	Sara’s Tearooms
Sentinel Leisure Trust	St. George’s Theatre
Sea Change Arts	South Yarmouth Neighbourhood
Waveney District Council (Making Waves)	Management Board
Members of GYBC Economic Development Committee	
Officers from GYBC: Communications, Culture, Tourism, Neighbourhoods teams	

October 2018

Local Enterprise Partnership
for Norfolk and Suffolk



£290m Growth Deal secured from Government to create jobs, boost skills and improve infrastructure



Great Yarmouth & Lowestoft EZ

- 52 businesses
- £45m private investment
- 2470 jobs created

Space to Innovate EZ
• 92 businesses

- £19m private investment
- 1948 jobs created



Subject: Beacon Business Park Extension Masterplan & further feasibility work

Report to: Economic Development Committee

19 November 2018

Report by: Head of Planning and Growth
Director of Development

SUBJECT MATTER

Beacon Business Park Extension Masterplan & further feasibility work

RECOMMENDATIONS

That the Economic Development Committee:

- 1. Endorse the principle and detail of this Masterplan**
- 2. Endorse the further committed detailed feasibility work for the extension to Beacon Business Park to be undertaken.**

1 EXECUTIVE SUMMARY

1.1 Following the significant commercial development of the existing Beacon Business Park site in recent years (which is nearing full occupancy) and a successful bid to the Norfolk Business Rates Pool fund, the Council commissioned (in August 2018) Hudson Architects to produce a high-level masterplan for the development of an extension to the Beacon Park Enterprise Zone. The masterplan currently in production will identify an indicative layout, the potential opportunities and constraints that may impact on development.

1.2 The Business Rates Pool (BRP) bid was successful for a total spend of up to £80,000, half of which is match funding provided by the Council's Enterprise Zone funding stream (the funding split for any BRP bid is always 50:50). The masterplan work only consumes a relatively small amount of this total, with more detailed feasibility and evidence studies (such as on utilities) necessary to progress the site towards a planning application stage. The BRP funding is constrained to feasibility work for the extension site, but also with a deadline to spend by the end of March 2019.

1.3 This report seeks member endorsement of the draft masterplan document. Further detailed studies are committed through the BRP funding and will be commissioned shortly. It is intended that the extension to the business park will be a major step closer to a planning application, and will also present and support potential investment opportunities.

2 INTRODUCTION & BACKGROUND

2.1 The existing business park at Beacon Park is located south of Bradwell (west of the James Paget University Hospital) and was awarded Enterprise Zone (EZ) status in

2012. The link road connecting the A47 and A143 was completed in December 2015 and since its delivery the site has grown from strength to strength and is now recognised as one of the most successful EZs in the country. A number of key employers are located on the business park including Proserv, Probe Oil Tools, and Pharos Marine Automatic Power. The Borough Council maintains an active list of enquiries and is in regular discussion with potential new occupiers. The existing business park is now over two thirds developed.

2.2 In September 2015, the Borough Council applied to the Government for an extension to Beacon Business Park Enterprise Zone (along with South Denes) following the success and take-up within the existing business park. The extension to the South Denes EZ was agreed and went live in April 2017. In November 2015, the Government awarded an additional 10ha of land EZ status located to the immediate west of the existing business park. The primary focus of the EZ is to cluster offshore energy related industries with higher value technology and research and development uses and activities locating at Beacon Park, with port and logistic operations locating at South Denes (with access to the Outer Harbour), which also benefits from EZ status. Accordingly, the extension will build on the success of the existing site with broadly similar uses.

2.3 The business park and its expansion is strategically important and this is reflected in the Borough Council's visions, plans and objectives. Within the Corporate Plan, as one of the economic priorities, Beacon Business Park "will further develop and extend, Beacon Park, building on its success". The Borough Council's Annual Action Plan for 2018-19 under 'Economic Growth' identifies the action to prepare a masterplan for new employment land at Beacon Park Enterprise Zone.

2.4 The adopted Local Plan Part 1: Core Strategy (December 2015) sets out through Policies CS6 and CS18 the intention to allocate new employment land by extending Beacon Business Park. The emerging Draft Local Plan (Part 2) builds on this ambition by defining the 20 hectare (within which 10 hectares will be for the Enterprise Zone) extension area on its Policy Map with a draft detailed policy clarifying the expected uses of the site. The draft policy is flexibly worded to encourage cleaner, higher-standard employment uses, but with particular encouragement to uses associated with the offshore energy industry or technology/research and development. This will ensure that there remains a focus on strengthening Great Yarmouth's existing offshore/energy industries, but not to the exclusion of other occupants that may be well suited to locate on Beacon Business Park.

2.5 The extension site unlike the existing business park (which is in Council ownership) is in two private ownerships, each representing approximately half of the site. The Borough Council is engaging with the landowners discussing potential options and the future development opportunities of the site. As a strategic employment allocation, it is important that the site is developed comprehensively, phased where necessary.

2.6 In March 2017 a bid was approved for Business Rates Pool funding for the

Beacon Business Park Extension masterplan and feasibility work. The Business Rates Pool gives a spend of up to £40,000, matched by the Enterprise Zone funding stream to the Council of £40,000. The Business Rates Pool funding is constrained to feasibility work for the extension site, but also with a deadline to spend by, which has been recently extended to the end of March 2019.

3 Beacon Business Park feasibility work

3.1 Following a tender process which commenced in July 2018, the Council appointed Hudson Architects to produce a high-level masterplan for the development of a 20 hectare extension to Beacon Park Enterprise Zone in August 2018. This is now well advanced with a draft document (attached to this report). The masterplan will identify an indicative layout, the potential opportunities and constraints that may impact on development.

3.2 More detailed feasibility studies need to be commissioned to progress the site towards a planning application stage. It is intended that further, more detailed, studies would likely include: a topographic survey, an ecological survey, a highways study, a report on establishing utilities connections, a potential detailed layout/design scheme and an archaeology survey. Once in place this feasibility package will provide an infrastructure delivery plan, to inform planning applications (and a potential Local Development Order extension for simplified planning), and could be used as evidence to support bids to external funding sources (e.g. through New Anglia Local Enterprise Partnership).

3.3 As part of the further feasibility work, it will be expected that the implications for the Borough Council in terms of financial considerations and potential delivery options will become more apparent as such work progresses. It is likely that overall the feasibility work will make significant steps to support a later planning application for the site. It is anticipated that these studies will be tendered for by the end of November 2018; with the surveys being completed by the end of March 2019 (the exception might be the ecological survey, some parts of which may only be able to be completed later in the spring).

3.4 Following the success of the existing Local Development Order (LDO) which has been in place at the existing Beacon Business Park site since April 2012 the Council should consider extending the LDO to include the extension site. The LDO essentially provides permitted development rights, removing the requirement to apply for planning permission, subject to meeting the development parameters set out in the LDO and associated design code via a 'self-certification' application. The process for amending the LDO is the same as if it was newly established, and therefore provides a chance to review the existing parameters (if considered desirable). Feedback from recent new occupiers at Beacon Business Park and South Denes has been that the LDO process, which greatly streamlines the planning process, with the reduced costs and timescales and increased certainty, was a significant "draw" to encourage them to develop.

4 Next stages

4.1 The Borough Council will continue its work on establishing the feasibility of the extension site to support a potential planning application. The Borough Council will also continue to discuss future plans and delivery options of the extension with the landowners.

5 RECOMMENDATIONS

That the Economic Development Committee:

- 1. Endorse the principle and detail of this Masterplan**
- 2. Endorse the further committed detailed feasibility work for the extension to Beacon Business Park to be undertaken.**

6 ATTACHMENTS

Appendix A – Draft Masterplan

Areas of consideration: e.g. does this report raise any of the following issues and if so how have these been considered/mitigated?

Area for consideration	Comment
Monitoring Officer Consultation:	N/A
Section 151 Officer Consultation:	Early discussions with finance have taken place on the implications of the potential broader development costs.
Existing Council Policies:	Great Yarmouth Borough Council Corporate Plan Great Yarmouth Local Plan Core Strategy (Policy CS6, CS18) & emerging Draft Local Plan Part 2.
Financial Implications:	Covered in the report. Further implications may be identified through further feasibility work and subject to delivery options.
Legal Implications (including human rights):	None at this stage
Risk Implications:	None
Equality Issues/EQIA assessment:	None
Crime & Disorder:	None
Every Child Matters:	None

MASTERPLAN REPORT

EXTENSION TO BEACON BUSINESS PARK, GORLESTON



GREAT YARMOUTH
BOROUGH COUNCIL



NOVEMBER 2018

CONTENTS

- 1 INTRODUCTION
- 2 RELATIONSHIP TO EXISTING AND EMERGING PLANNING POLICY
- 3 DESCRIPTION OF FLEXIBLE EMPLOYMENT USES
- 4 IDENTIFICATION OF CONSTRAINTS
- 5 INDICATIVE SITE LAYOUT
- 6 DESIGN SUMMARY

Aerial Photography on Front Page, page 3, and page 7 courtesy of Mike Page.

PREPARED ON BEHALF OF GREAT YARMOUTH BOROUGH COUNCIL BY:

HUDSONArchitects

urbandelivery
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1. INTRODUCTION

1.1 Background Information

In November 2015, the Government awarded an additional 10ha of land Enterprise Zone (EZ) status within a 20ha site area, building on the existing business park site, at Beacon Park, Gorleston, which is one of the most successful EZs in the country. The primary focus of the EZ is to cluster industries with an offshore energy focus, with higher value technology and research and development uses and activities locating at Beacon Park; and port and logistic operations locating at South Denes (with access to the Outer Harbour), which also benefits from EZ status. Accordingly, the extension will build on the success of the existing site with broadly similar uses.

The Council has developed the existing business park, with demand for units/space direct from companies moving in, and some speculative development. The existing business park is largely built out with a small part of the site still under construction. The existing business park benefited from the incentive of business rate relief which running over a five year period has now expired, and is no longer available for new businesses.

The Council's Local Plan Part 1, the Core Strategy (adopted 2015) supports the extension site through Policy CS6, setting out the ambition to extend employment land at Beacon Park. The emerging Draft Local Plan part 2 defines the extension area on its policy Map with a draft detailed policy clarifying the expected use of the site. The draft policy is flexibly worded to encourage cleaner, higher standard employment uses, but with particular encouragement to uses associated with the offshore energy industry or technology/research and development. This will ensure that there remains a focus on strengthening Great Yarmouth's existing offshore/energy industries, but not exclusively to allow other occupants that may be well suited to locate on the business park. The appropriate uses should not be restricted to just office space, but should avoid large areas of 'dead space', i.e. large areas of storage or warehousing.

The aims of the masterplan document are to show how the site could be developed in accordance with the Borough plan policies and identify anticipated development zones and layout opportunities that could be implemented to support a planning application.



Aerial site view showing Beacon Park.

1.2 The Existing Site & Usage

The site is located southwest of Great Yarmouth, on the western fringe of Gorleston/Bradwell. The existing business park benefits from access to the A47 to the east, and a relatively recently constructed road connecting through to the A143 to the west.

Part of the extension site (the northern half, approximately 7ha) is captured under the outline planning consent, ref. 06/13/0652/O (approved in August 2014) for employment uses, which was allocated in the Core Strategy under Policy CS18 (a residential-led urban extension but providing for approximately 10-15ha of employment land). The residential element of this site is under construction with around 150 units already completed, and detailed planning applications are being submitted as the residential element of the site continues to develop in phases.

The extension site is in two private ownerships, each representing approximately half of the site. The Council engages regularly with the landowners discussing potential options and the future development opportunities of the site. As a strategic employment allocation, it is important that the site is developed comprehensively, and when completed will appear as a single large high-quality business park.

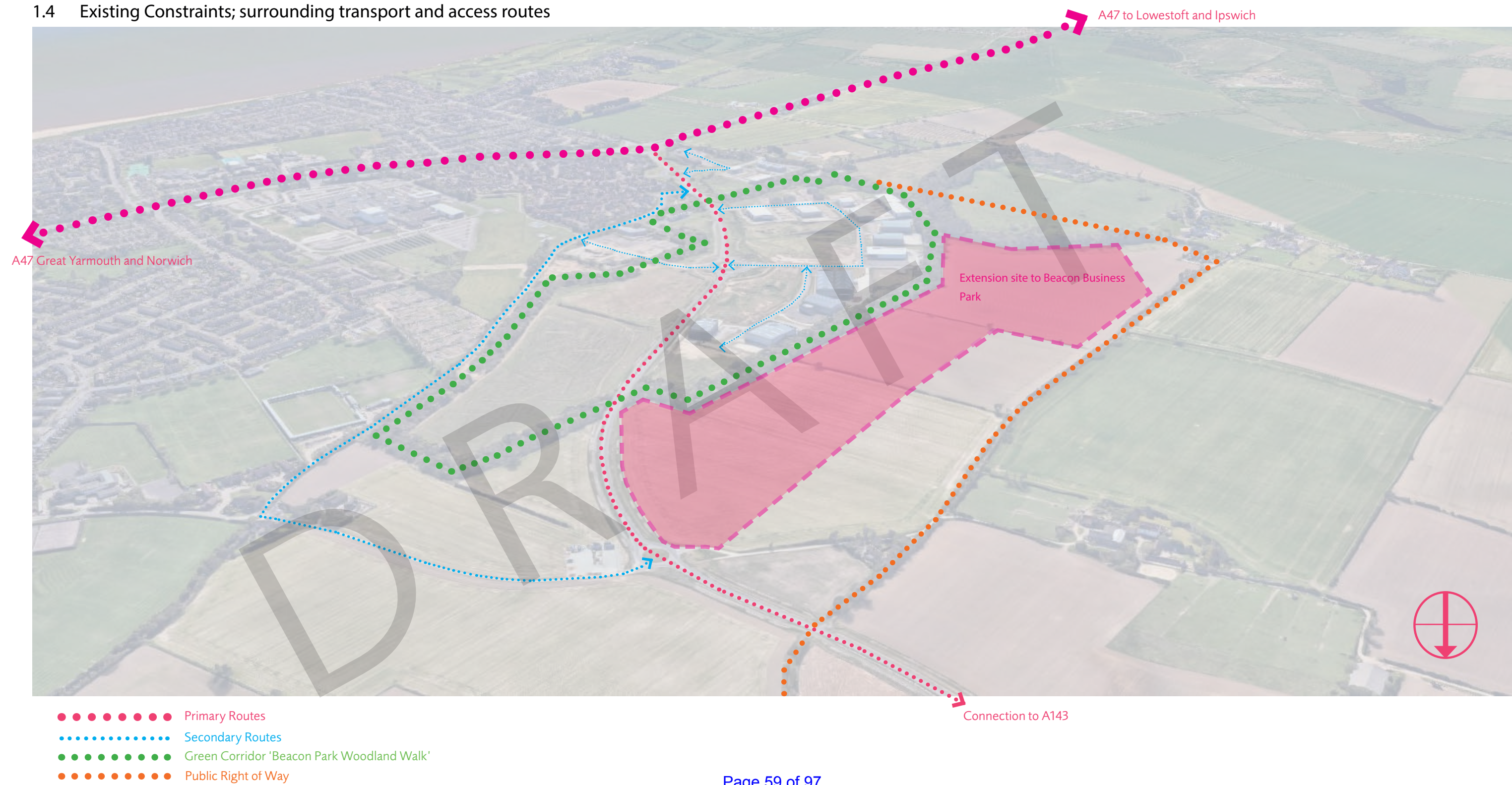
The land is greenfield and therefore relatively free of constraints. Further details will be required later at the planning application stage, and Section 4 within the following document identifies any extraordinary or significant constraints with potential solutions should any arise.

DRAFT

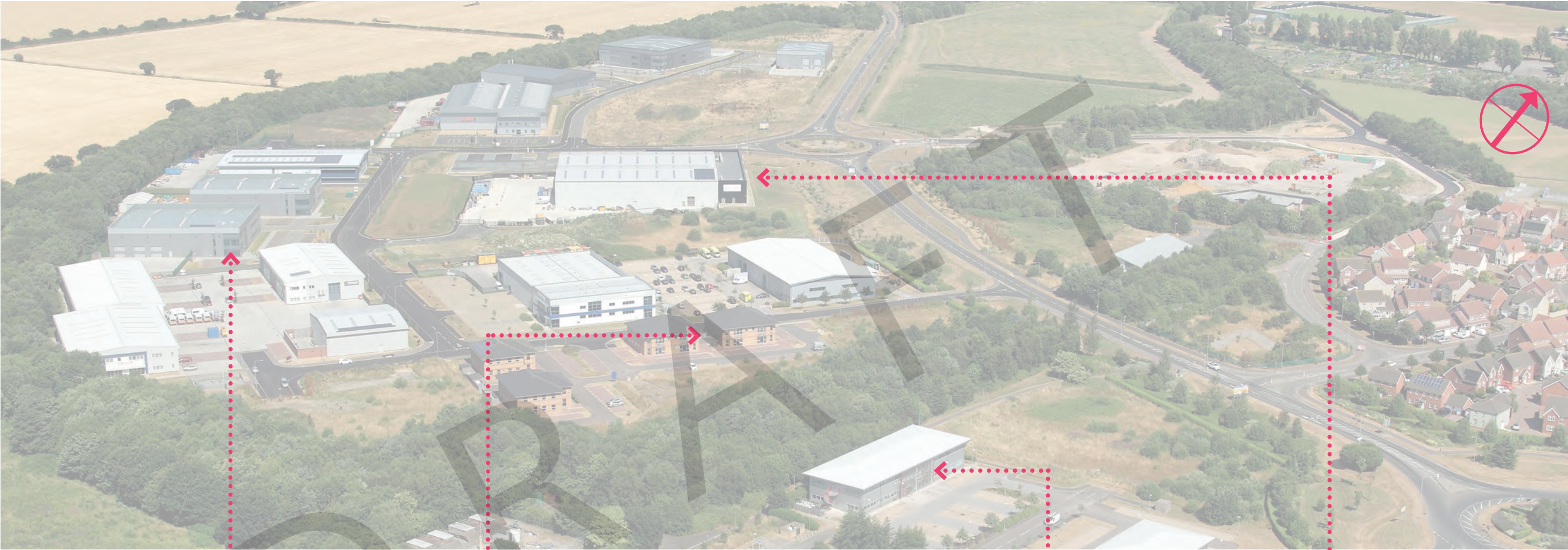
1.3 Existing Constraints; aerial view of the site highlighting adjacent land uses (refer to Section 2, item 2.19 for further detail of planning permissions)



1.4 Existing Constraints; surrounding transport and access routes



1.5 Existing Site Context



SITE 14B - 2 Lancelot Road



SITE 8 - Wellington Park



SITE 7 - Minerva House



SITE 12A - Proserv

2. RELATIONSHIP TO EXISTING AND EMERGING PLANNING POLICY

2.1 Introduction

This section provides a review of the current and emerging planning policy framework relevant to the extension to Beacon Park Business Park, to ensure future development is in accordance with planning policy.

2.2 National Planning Policy Framework (July 2018)

At the national level, the National Planning Policy Framework (NPPF) identifies the economic objectives to build a strong, responsive and competitive economy, by ensuring sufficient land of the right type, location and availability supports growth and innovation, alongside the coordination of infrastructure provision (paragraph 8). In summary, the NPPF seeks to:

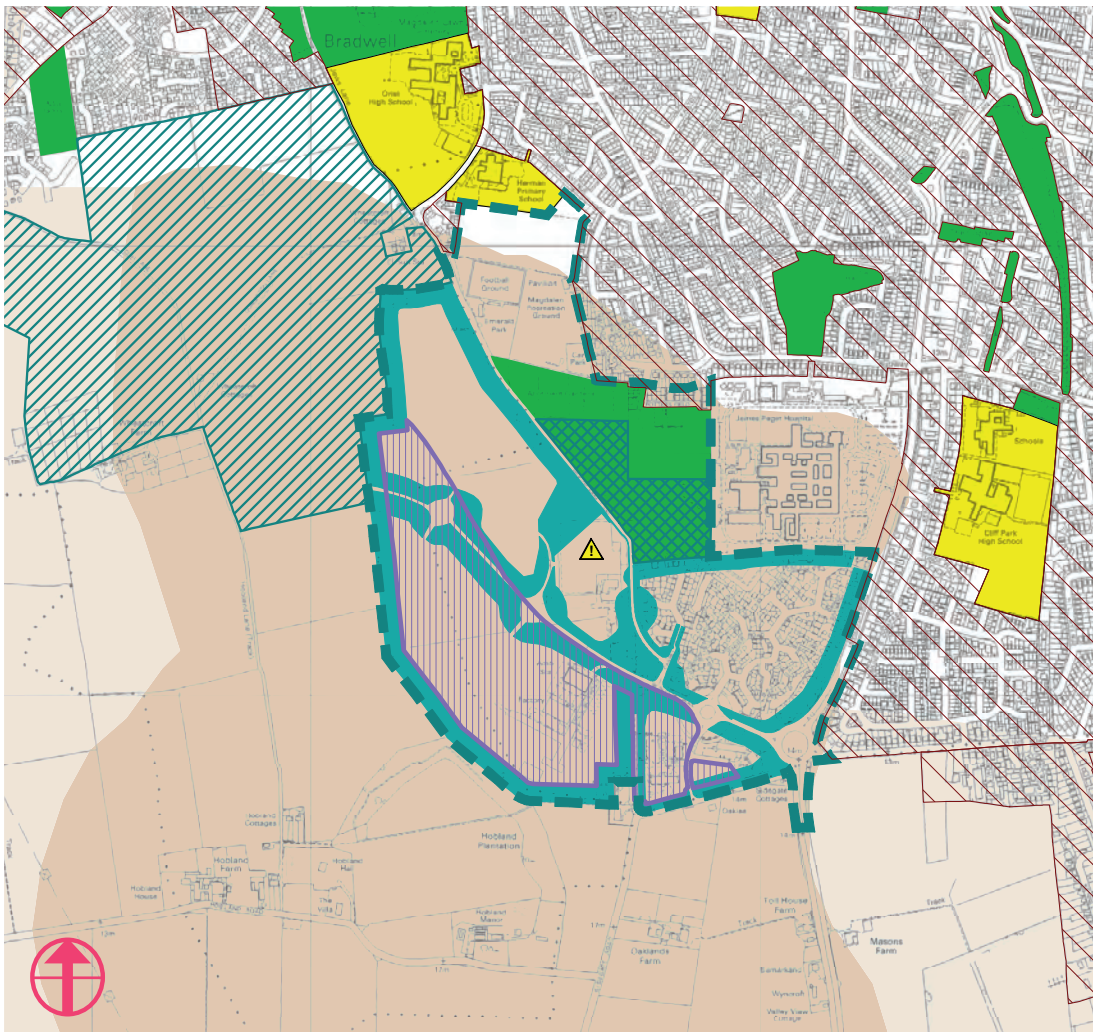
- create the conditions for businesses to invest, expand and adapt, taking account of local business needs, strengths and future challenges (paragraph 80);
- identify strategic sites to meet local and inward investment needs (paragraph 81), and
- considers the locational requirements of different sectors (paragraph 82).

2.3 The Development Plan

At the local level, the relevant adopted Development Plan is comprised of the following:

- Great Yarmouth Local Plan: Core Strategy 2013-2030 (December 2015)
- Great Yarmouth Borough-wide Local Plan (2001) (saved policies)
- Norfolk Minerals and Waste Core Strategy and Minerals and Waste Development Management Policies DPD (September 2011)
- Local Development Orders (LDOs) for South Denes and Beacon Park

The Council are in the process of preparing the Draft Local Plan Part 2 Development Management Policies, Site Allocations and Revised Housing Target (August 2018). This document will replace the saved policies and updates part of the Core Strategy.



Great Yarmouth Local Plan; Core Strategy (Adopted December 2015)



Great Yarmouth Local Plan: Core Strategy 2013-2030 (December 2015)

The Great Yarmouth Local Plan: Core Strategy (December 2015) Policies Map identifies the extension land, subject of the masterplan study, as follows:

- Grade 1 Agricultural Land (Policy CS6j)
- Beacon Park Extension (Policy CS18) – northern part of the masterplan area only.

The existing Beacon Park Business Park is identified as:

- Safeguarded Employment Area and Grade 1 Agricultural Land (Policy CS6)
- South Gorleston Development Area (Policy SG1)
- South Gorleston Development Area - Amenity Landscaping (Policy SG11)

The Plan identifies the importance of the energy and engineering, and port and logistics sectors to the local, regional and national economy and outlines a vision to strengthen the local economy by ensuring an appropriate employment land supply to meet current and future needs.

The Borough wide economic Policy CS6 supports the growth and development of higher value technology and energy-based industries, and allocates at part c) an extension to Beacon Park (approximately 10-15 hectares of employment land), subject to site specific Policy CS18 (see below). Part j) of the policy seeks to minimise the loss of the best and most versatile agricultural land but does not restrict development at such designations.

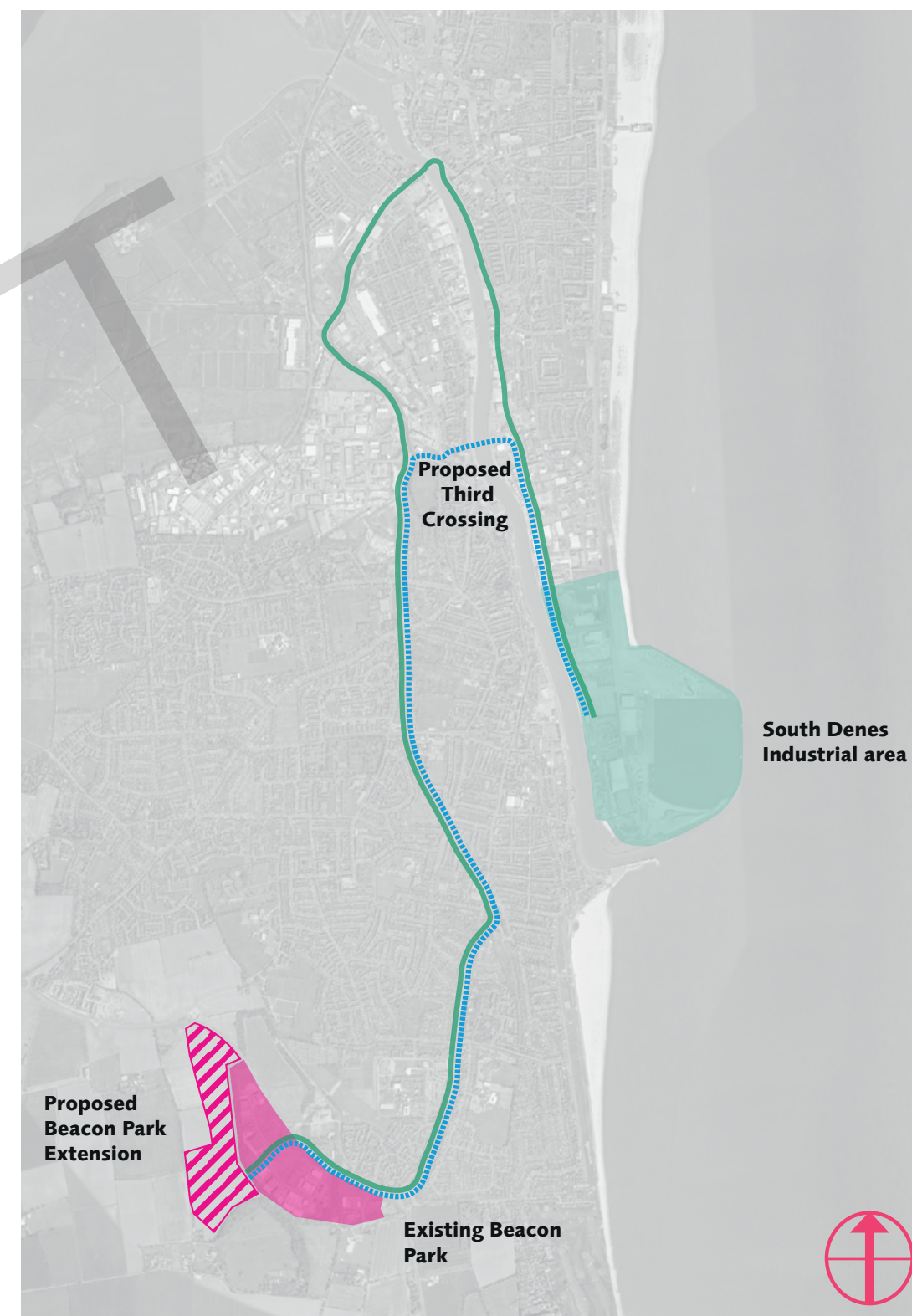
In this case, the existing business park is well-established and largely built out with options to extend limited. Furthermore, whilst it is surrounded by Grade 1 agricultural land, there is no alternative available land of lower value to provide an extension, and the strategic value of the employment site provides an overriding sustainability benefit to justify the loss of high-grade agricultural land.

The supporting justification to Policy CS6 identifies the role of Beacon Park (together with South Denes) as Enterprise Zones in the Borough, which both benefit from Local Development Orders (LDOs). These sites are considered integral to supporting the growth and expansion of the key sectors with the principle of an extension to Beacon Park firmly established in the Plan. The strategic importance of Beacon Park is specifically identified in Policy CS2 which identifies the site as one of two key strategic mixed-use development sites in the Borough.

Further detail is provided in site specific Policy CS18 which seeks to deliver the objectives of Policy CS6). The northern part of the extension land is subject to Policy CS18. This policy proposes a sustainable mixed-use urban extension to the existing Beacon Park, to include under Policy CS18e) approximately 10-15 ha of new employment land to the west of the existing Beacon Business Park, focused on office and light industrial uses within Use Class B1 and B8. The Plan envisages that the additional employment land should deliver a seamless extension to the existing business park and meet future needs, in support of the offshore energy industry.

By comparison, the Core Strategy identifies South Denes as oriented directly towards port and logistics related activities, particularly those associated with the offshore energy, and a focus for general industrial uses. This clear differentiation in location and planning policy ensures that Beacon Park is promoted for higher value technology, and research and development uses compared to heavier industrial and port related uses at South Denes. Overall, this complementary offer focused on the energy sector, may offer opportunities for Beacon Park to attract light industrial and office uses from South Denes which do not require a port location.

The Beacon park and South Denes Enterprise Zones are accessed via the A47 and South Quay (A1243), providing a route reasonably well suited to larger vehicles. This will route will be shortened by the proposed third crossing, making the travel distance shorter and potentially further improving access for HGVs.



Location map showing accessibility connections between the South Denes EZ and Beacon Park EZ, in the context of the third river crossing.

2.4 Great Yarmouth Borough-wide Local Plan (2001) (saved policies)

More strategic policies have largely been replaced by the Core Strategy although a number of policies remain relevant to the existing Beacon Business Park. This includes saved Policy SG1 related to the South Gorleston Development Area which is supportive of high quality, high tech, R&D and office uses at Beacon Park together with saved Policy SG11 related to amenity landscaping along the link road in the Development Area.

Other Relevant Considerations

2.5 Draft Local Plan Part 2 Development Management Policies, Site Allocations and Revised Housing Target (August 2018)

The emerging draft Local Plan Part 2 has recently been consulted on and sets out to deliver the Part 1 Core Strategy. Importantly, it identifies a number of draft employment allocations for Gorleston, including the extension land. In summary, the draft policies map identifies the following designations for the site:

- Beacon Park Business Park Extension (Policy GN5-dp)
- Development Limit (Policy G1-dp)
- Beacon Park Mixed Use Extension (Core Strategy Policy CS18)

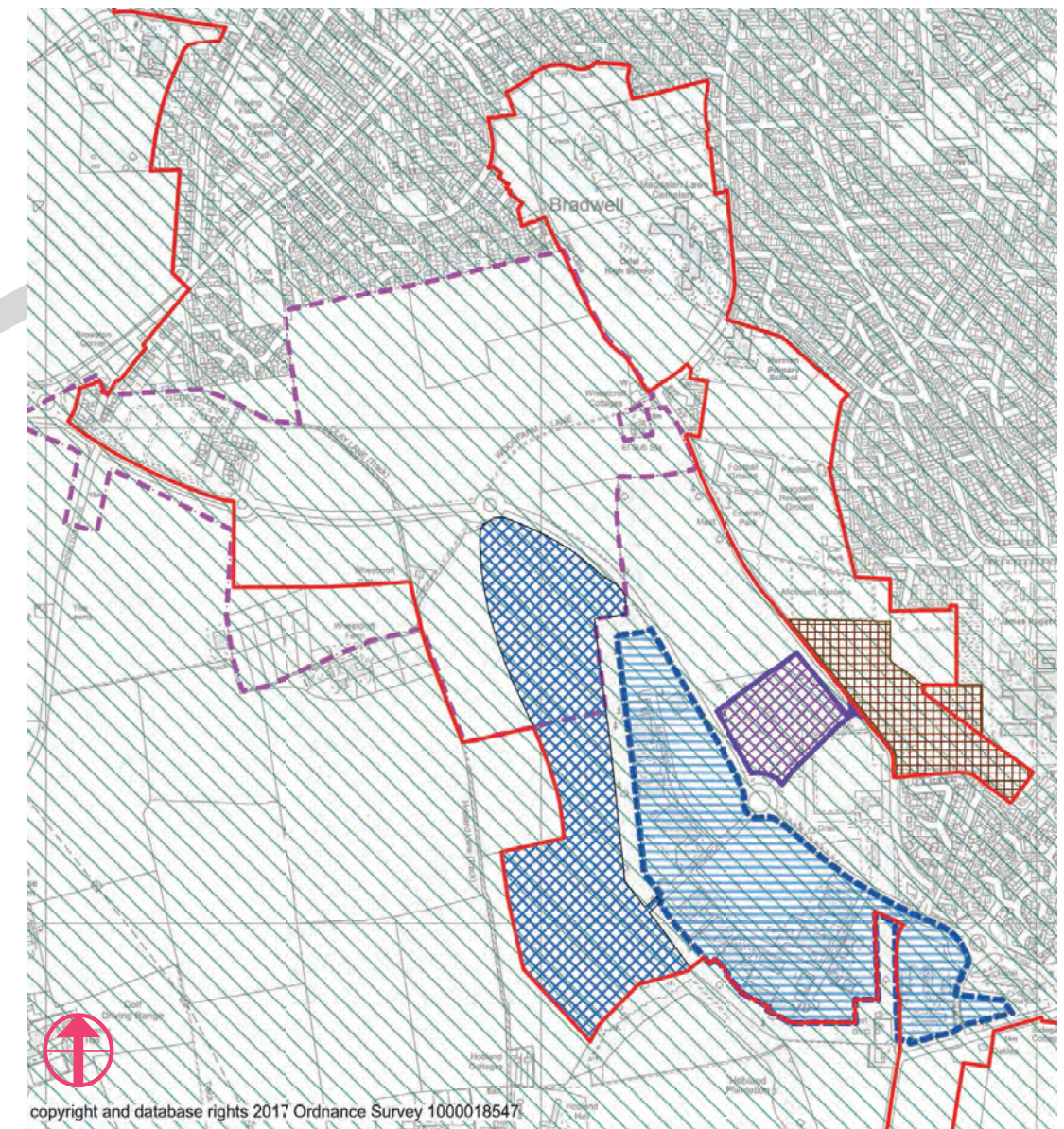
The masterplan site is specifically allocated and defined as the Beacon Business Park Extension by Policy GN5-dp. The draft policy states:

Particular encouragement will be given to uses associated with:

- The offshore energy industry;
- Higher value technology and employment (directly or supporting in the locality); and
- Research and development activities.

High standards of design quality and distinctiveness for both buildings and landscaping will be required.

Residential development will not be permitted. Other business uses and premises (such as heavy industry, large scale storage and distribution) will be permitted only where they can satisfactorily demonstrate they will not unacceptably erode the environmental, amenity and design standards intended for this business park. (The Council will generally seek to facilitate accommodation of these in other locations).



Great Yarmouth Emerging Plan Part 2

- Beacon Park District Centre (BL1-dp)
- Beacon Park Business Park Extension (GN5-dp)
- Beacon Park Business Park (GN4-dp)
- Beacon Park (Mixed Use) Extension (CS18)
- Affordable Housing Sub-market Area 1 (CS4)
- Affordable Housing Sub-market Area 2 (CS4)
- Safeguarded Employment Area (CS6)
- Development Limits (G1-dp)

The draft policy identifies a larger area of employment land to that outlined in adopted Policies CS6c and CS18e (but that which matches the approved Enterprise Zone extension site). Furthermore, the emerging policy provides further flexibility in employment uses while maintaining a general focus on the requirements for this strategic employment site but states that heavy industrial uses would not be compatible with the uses encouraged at the extension site.

By contrast, draft Policy GN4-dp relates to the existing Beacon Business Park which remains supportive of Class B1 and B8 uses. Accordingly, the policy does not support development that would undermine the strategic function of the site – that being residential development and Class B2 (and related sui generis) uses, or those uses which would cause excessive disturbance on existing occupiers.

Other emerging allocations with implications for the site include Beacon Park District Centre (Policy BL1-dp) which is a draft allocation to support worker and resident needs of the Beacon Park growth area (also addressed under Core Strategy Policy CS7), and the Hospital Landing Area (Policy G3-dp) for James Paget hospital, both located to the east of the extension site. In addition, the Development Limits have been reviewed and revised to incorporate the allocation/permitted development sites. The details and extent of the District Centre identified is, however, being reviewed through the emerging Local Plan.

2.6 Norfolk Minerals and Waste Core Strategy and Minerals and Waste Development Management Policies DPD (September 2011)

The site is underlain by a defined Mineral Safeguarding Area for sand and gravel and subject to the requirements of Norfolk Minerals and Waste Core Strategy Policy CS16 which seeks to safeguard mineral resources to the satisfaction of the Mineral Planning Authority.

2.7 Great Yarmouth and Lowestoft Enterprise Zone Local Development Order for Beacon Park (April 2012)

The majority of the existing Beacon Business Park is subject to an adopted Local Development Order (LDO) which offers a simplified form of planning via self-certification (subject to meeting criteria, conditions, and the Design Code) for office, research and light industrial uses for a 10 year period.

The LDO is supported by the Beacon Park Design Code (April 2012) which sets parameters to guide development but does not fix architectural style or detailing. It further sets a vision for Beacon Park alongside building scale parameters including maximum and minimum heights. High quality landscape and building design objectives underpin the Design Code, which is further confirmed by the existing and emerging policies for Beacon Park Business Park.

It is anticipated the LDO, subject to meeting the legislative requirements, may be extended to the Beacon Park Business Park extension land.

2.8 Great Yarmouth Economic Growth Strategy (2017-2021)

The Council's Economic Growth Strategy outlines an objective to provide land and premises for energy sector development and identifies the extension of Beacon Park.

2.9 The Plan 2015-2020

The Council's corporate plan identifies economic growth as one of its priorities and specifically identifies the extension of Beacon Park as a key objective.

2.10 Norfolk and Suffolk Economic Strategy (2017)

The New Anglia Local Economic Partnership (LEP) identifies Beacon Park as part of the Lowestoft-Great Yarmouth Enterprise Zone, to help support energy related development.

2.11 Planning Applications and Permissions

Whilst this section is concerned with the relationship to existing and emerging planning policy, a number of planning decisions are directly relevant to the study area. These relate to the following planning applications:

- Planning application 06/13/0658/SU – planning permission granted on 13 June 2014 for the construction of a new link road from the A47 to the A143 Beccles Road. The road is built and incorporates a roundabout, located at the north of the subject site, which provides an access opportunity.
- Hybrid Planning application 06/13/0652/O – full planning permission for Phase 1 of residential development of 150 houses, and outline planning permission for 700 dwellings, commercial mixed use consisting of B1,B2,B8, local centre (A1-A5,B1,D1 & other community uses); primary school and open space, approved on 11 August 2014. The consent relates to the Beacon Park extension strategic allocation subject to Core Strategy Policy CS18.

Of that Hybrid Planning application, approximately 150 residential units have been completed, and further detailed planning applications are being submitted to bring forward the phased development of the residential element. The approved masterplan prepared by Persimmon Homes identifies the southern area of the consented site for employment uses although the extent of land shown includes land which is not defined in the emerging Policy GN5-dp for the business park extension. The outline consent also includes Class B2 uses which differs to that of the preferred commercial uses at Beacon Park

- Hybrid Planning Application 06/16/0391/SU – full planning permission for phase 1 of residential development of 56 units and outline planning permission for up to 231 residential units. The first phase of the site is under construction and is being developed by Equinox Enterprise Ltd, the Borough Council's trading company

2.12 Summary

In summary, the review of existing and emerging planning policy confirms the following:

- The objective to extend Beacon Business Park is firmly supported in the adopted Core Strategy through Policies CS6 and CS18 which supports land for Class B1 and B8 uses.
- Whilst the extension land is identified as Grade 1 agricultural land, Policy CS6j allows for development in such locations in appropriate circumstances.
- The extension land is allocated in the emerging Local Plan Part 2 through draft Policy GN5-dp which maintains flexibility on end uses alongside continued support for targeted sectors.
- The vision for the extension to Beacon Park is a high quality, well designed business park.
- The key employment sites for the Borough, Beacon Park and South Denes, provide different offers with South Denes focused on general industrial uses and port related activities which are not suitable at Beacon Park.
- A District Centre is allocated for Beacon Park on a separate but nearby site which will minimise any need for ancillary uses at the extension site.
- The extension of Beacon Business Park is identified in the Council's Corporate Plan and Economic Growth Strategy, and forms part of the LEP's Norfolk & Suffolk economic strategy.

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3. FLEXIBLE EMPLOYMENT USES

3.1 Introduction

This section provides a review of the employment uses in relation to the current and emerging planning policy framework to set the context for the extension to Beacon Business Park and to ensure future development is in accordance with planning policy and the local demand.

3.2 Employment Uses at Beacon Park

Existing adopted Plan policy (Policy CS18) and the LDO, is focused targeting the high value technology and research and development sectors, especially the offshore energy industry. Class B1 and B8 is specifically identified under Policy CS18, and specific reference to starter units and managed workspace.

The emerging policy for the extension site, identified under Policy GN5-dp, is less restrictive, reflecting its flexible approach to accommodating suitable employment uses. Indeed, residential development is the only identified use that is not permitted. In contrast to the existing Beacon Park, the draft policy does not discount potential for general industrial uses (Class B2) although the suitability of such proposed uses would need to be demonstrated to ensure that they do not undermine the high-quality environment of the business park..

The key issue here is that the extension site is seeking to capture a wider range of employment uses, although what those future end uses will be, will be determined largely by market requirements but are positively targeted at the key sectors of offshore energy; higher value technology and, research and development.

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4. IDENTIFICATION OF CONSTRAINTS

5.1 Highways

The completion of the A47 to A143 link road provides a main connection which includes a number of roundabout junctions allowing for future access to other future development. This includes a roundabout located at the north of the extension land. This road was planned to integrate the mixed use development at Beacon Park in a corridor with James Paget University Hospital, and provides a new northern access opportunity into the site. The road also includes a signalised roundabout to the south. A shared cycleway and pedestrian footway runs parallel to the road on the north side.

The principle of development from a highways perspective is considered acceptable reflecting the approval of planning permission for the delivery of the Beacon Park mixed use allocation, with residential development well advanced. Notwithstanding this, detailed consideration for the extension land will need to be undertaken with Norfolk County Council Highways Authority and Highways England as statutory consultees at a future planning application stage. The proposed road would need to be constructed to adoptable standards.

Initial discussions with Norfolk County Council Major and Estate Development would indicate that a connection from the existing Beacon Park road network would be acceptable.

With regard to public transport links, there is a current serviced route along Beaufort Way, but with the nearest stop being at the James Paget University Hospital. Future service provision will need to be subject of further discussion.

5.2 High Speed Broadband Connections

Provision for two ducts exists to ensure high speed broadband connectivity is maintained. It is understood Openreach are the current provider and that new connections will need to be established to serve the extension site.

5.3 Other Utilities Connections

The provision of services to the site will require detailed discussions with each service provider. However, electricity, gas, water and telecommunications infrastructure are all present at the existing Beacon Park Business Park development. It is considered that the extension of such infrastructure will deliver a service to the site albeit groundworks will be required.

5.4 Water Resources and Flood Risk

The Environment Agency online Flood Map confirms the extension site is located in Flood Zone 1.

Whilst there is good provision of drainage on the existing site, additional survey information related to site drainage (surface water and foul), contamination and geo-environmental conditions would need to be prepared to support any planning application for the extension land.

5.5 Ecology

The extension site is not subject to any specific environmental designation identified in the adopted Development Plan and is currently in agricultural (arable) use. Given the nature of its managed state, the site is unlikely to be sensitive from an ecological perspective.

The Habitat Regulations Assessment (2012) and Integrated Environment Assessment (2012) prepared to inform the Local Development Order for Beacon Park, identifies a number of statutory designated sites in the wider area (Breydon Water SPA and SSSI, Great Yarmouth North Denes SPA and SSSI, Outer Thames Harbour SPA , Broads SAC, and Halvergate Marshes SSSI). All of the sites are some distance from the extension land and would be unlikely to have significant impacts on the designated sites of particular conservation importance.

The western boundary of the extension land is subject to an established treeline buffer, which is of local ecological value and would largely be retained.

It will be necessary for a future planning application for the extension land to be supported by an updated ecological appraisal of the site.

5.6 Amenity

The current and emerging Local Plan allocate the focus for local community services and facilities at Beacon Park District Centre, and is located beyond the extension land to the east and to the east of Beaufort Way. This designated district centre represents the Plan's objective for serving the residential and commercial needs of the Beacon Park growth area.

Given the intent of the dedicated district centre, the provision of ancillary support services at the extension land would conflict with Plan strategy.

5.7 Landscaping

With the exception of the treeline buffer to the eastern boundary with the existing Beacon Park Business Park, the extension land is relatively open and in arable agriculture use. The landscape objectives are to retain this as an important landscape features at the boundary, and build upon this on the Western boundary of the extension site. The principle trees and hedgerows will be retained, given that the extension site outline does not extend onto the existing, established boundaries of the ownership boundary. New planting will include denser trees and hedging on the Western boundary of this extension site, towards the South. Towards the North, along the same boundary the trees will become less dense, and more sporadic to open up views from the approaching A143 link. Within the plots, planting will be used to soften frontages and provide enclosure of vehicle parking and manoeuvring areas.

A landscaping report would need to be prepared to accompany a future planning application for the site. The strategy for this would be formulated to ensure consistency with existing nature and species of the planting currently used, and native species would be encouraged wherever possible. Particular care will be taken where trees are removed as part of the proposed development.



Location map showing accessibility connections between the South Denes EZ and Beacon Park EZ, in the context of the third river crossing.

5.8 Archaeology

There are no known archaeologically significant features within or adjoining the extension land. A detailed archaeological report would need to be prepared to accompany a future planning application for the site. There are no scheduled ancient monuments in close proximity to the extension site.

5.9 Use of Agricultural Land

The extension land is classified as Grade 1 agricultural land.

Policy CS6(j) is applicable which seeks to minimise the loss of the best/most versatile agricultural land but does not restrict development on such classifications. Whilst it is surrounded by Grade 1 agricultural land, there is no alternative available land of lower value to provide an extension, and the strategic value of the employment site provides an overriding sustainability benefit to justify the loss of high-grade agricultural land.

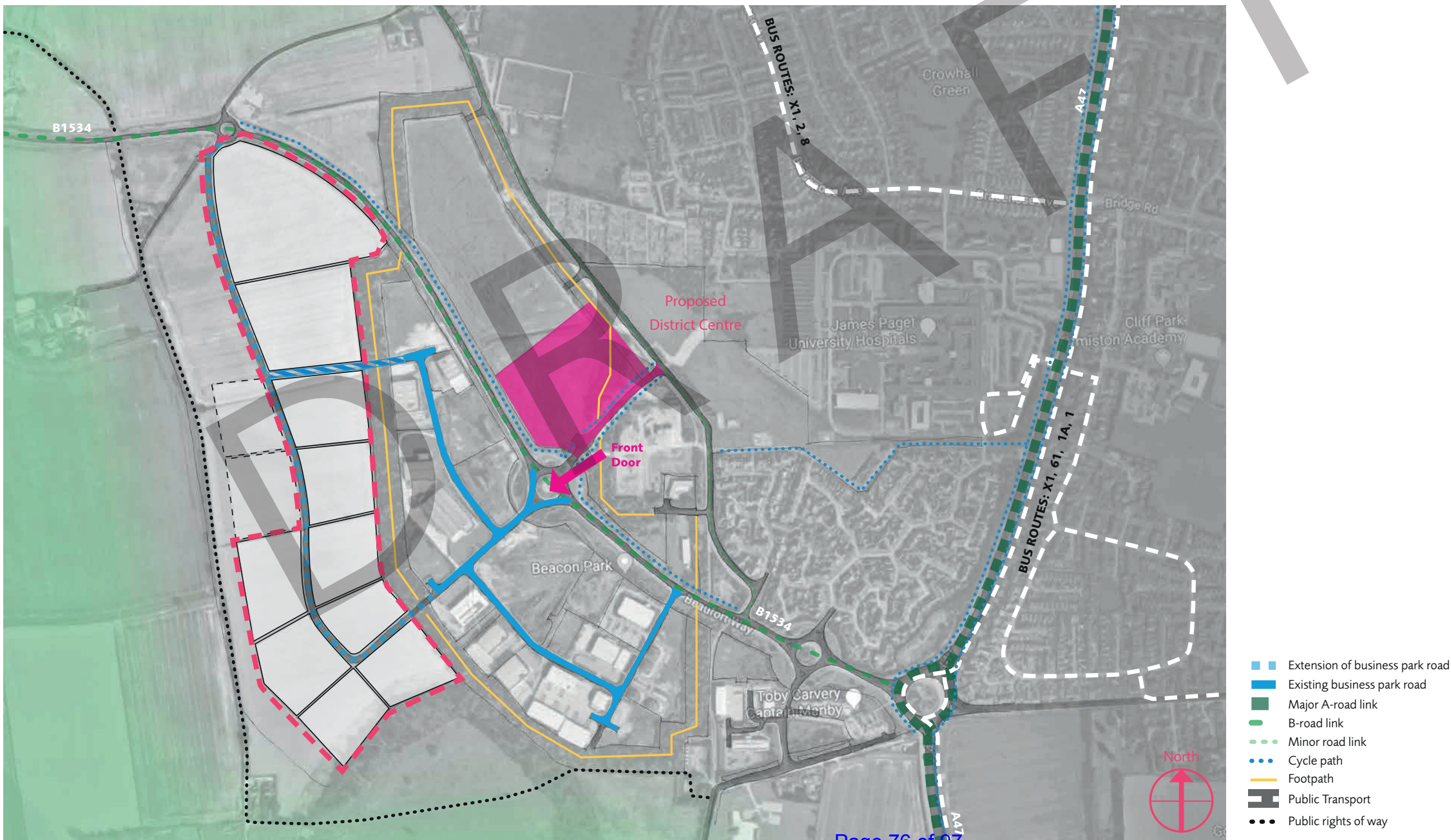
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5. INDICATIVE SITE LAYOUT

5.1 Connection to Existing Transport Infrastructure and Reinforcing Existing Amenity

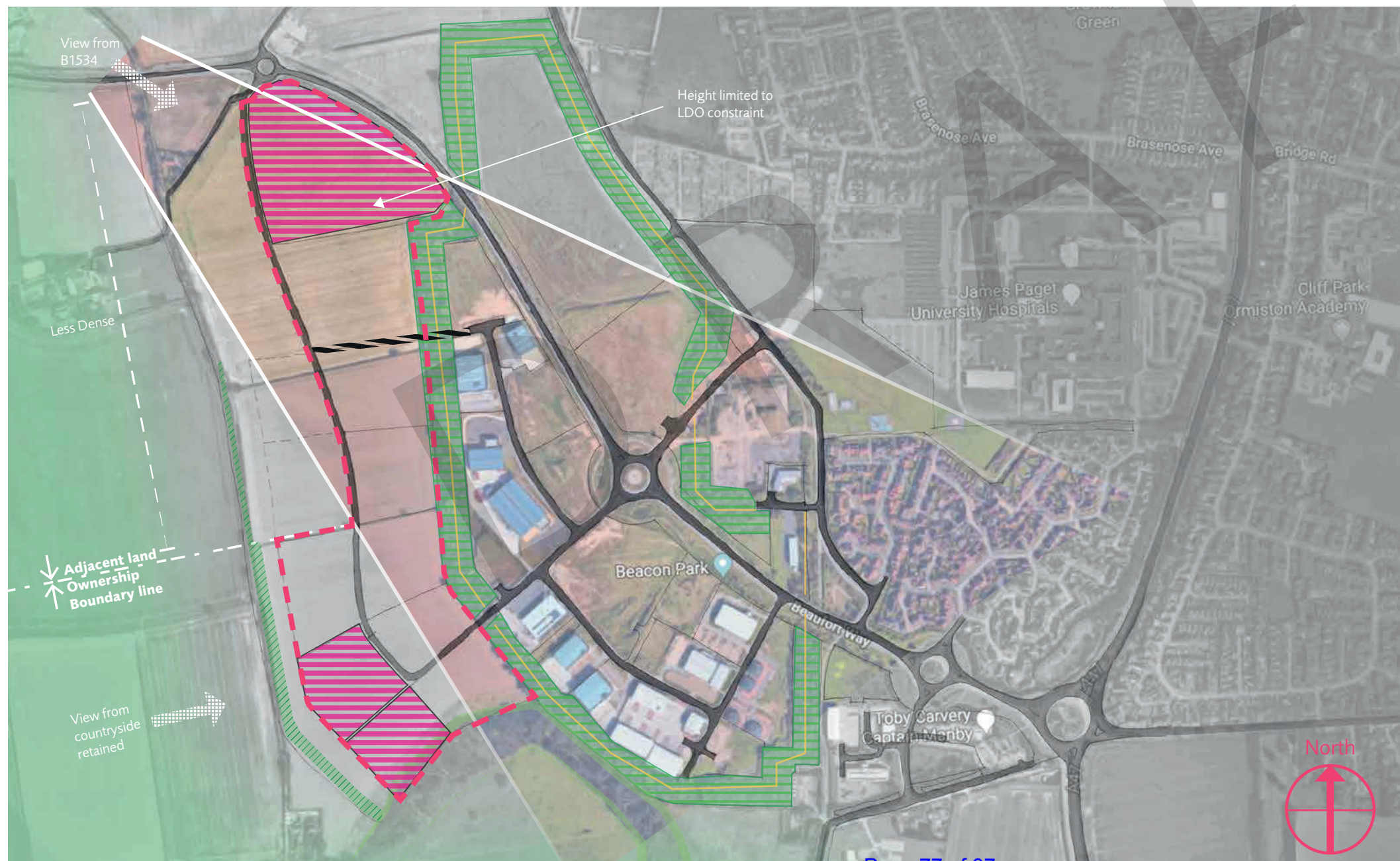
A key part of the design strategy is for the masterplan to connect to the existing provision of amenity and transport links. As ancillary uses are unlikely to feature on the extension site, a focus towards the Beacon Park District Centre should be reinforced to help establish a front door. The indicative layout shows a potential road layout within the extension site, along the western boundary that connects to the existing road network within Beacon Park. Delivering the access road and plot entrances in a flexible way is important to allow the development to respond to demand as it arises.



5.2 Design

Another key aspect of this proposal is the enhanced view approaching from the A143. The existing LDO suggests that buildings within a certain view range could be restricted in terms of exceeding the height parameters specified in the adopted Design Code. Outside of the restricted height zone, a controlled relaxation of the parameters to encourage certain businesses could be considered, dependent on the ability to vary the LDO criteria.

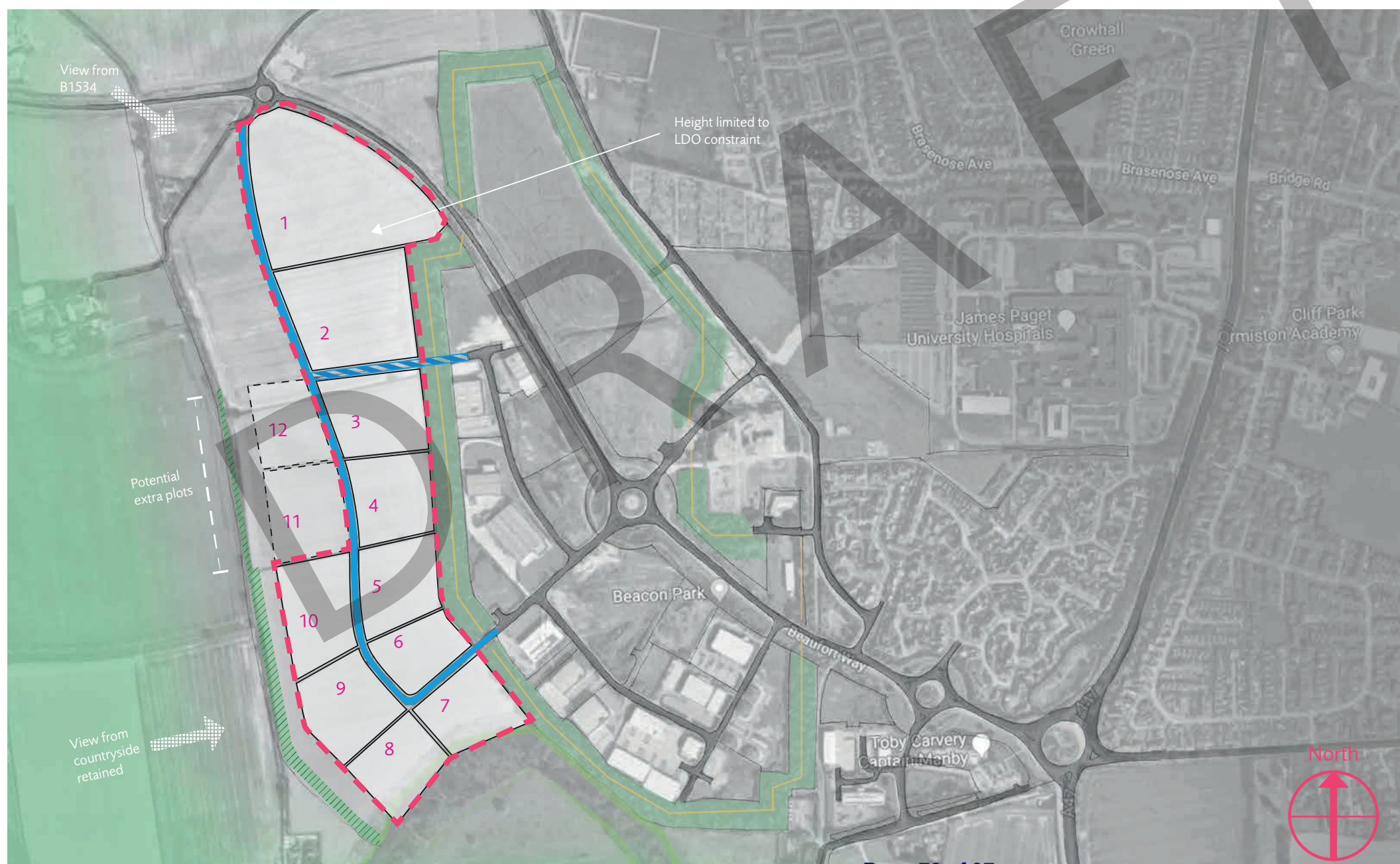
Establishing a prominent, landmark site at the Northern aspect of the site will also help reinforce the identity of the park from the approaching A143. It is also proposed that a another landmark site could be located at the South Western corner of the site, to help promote access and permeability from the surrounding access routes.



5.3 Indicative Site Layout

An indicative layout of the scheme and the proposed road alignment is shown below based upon the planning policy assessment and identification of constraints. The proposal will build upon the existing amenity, creating a well landscaped business environment with a range of plot sizes to meet market demand and the varied needs of businesses. There is an existing tree lined screen to the East, which forms part of the 'green gym' and is of some ecological value. It is proposed to replicate this screening on the Western boundary of the extension site, with a reduced density.

The layout has been developed to allow for phased delivery. While the focus for new occupiers is potentially on the energy sector, research & development, and high-tech; the exact level of demand and size of plots will only become clear as the project is delivered. Therefore the strategy for the site overall should be to create flexible plots and carefully planned phased infrastructure so that demand can be accommodated to optimise financial viability.



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6. DESIGN SUMMARY

6.1 A 'Connected' Masterplan Development

The proposed development of the extension site at Beacon Park should be designed to ensure that the current site and extension area are well connected. Supporting the transfer of the existing LDO would ensure a consistent approach to the architectural design, together with a similar landscaping approach. By integrating the new access roads into the existing infrastructure this will also help support the overall vision, with landmark developments and large plot sizes strategically positioned to give the entire site a clear sense of connection.



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Subject: Economic Development - Quarter 2 Performance Report 2018/19

Report to: Economic Development Committee – 19 November 2018

Report by: Development Director

SUBJECT MATTER/RECOMMENDATIONS

The following gives an update on current performance of Economic Development Committee measures for the second quarter of 2018/19 (Jul – Sept) where progress is assessed against Targets which are set at the start of the financial year.

Progress against Targets is assessed by RAG (Red/Amber/Green) ratings and is also assessed in terms of Direction of Travel (DoT) through use of arrows.

The summary report, see attached, highlights performance measures that are within the area covered by the Economic Development Committee. Commentary is provided at the end of the summary report highlighting those measures that outturns are below target or moving in the wrong direction.

The report highlights performance measures that have not achieved the target for this period. It also highlights a number of measures that are showing exceptional performance against targets.

RECOMMENDATIONS

The actions are:

- All measures to be monitored during the next quarter

1. INTRODUCTION/BACKGROUND

In September 2015 the Council agreed 'The Plan' which sets out its strategic vision and priorities up to 2020. This established the framework against which the Council should measure its performance at both officer meetings (through regular management reports) and Member meetings (through performance reports). This report provides details of a number of indicators affecting Economic Development Committee.

2. PERFORMANCE MEASURES

Performance Measures – Highlights

Performance measures cover a range of services delivered within the area covered

by the Economic Development Committee. The details in the summary report provide quantitative information about the performance of these services and provide useful trend data. A traffic light status easily identifies if improvement is required.

Generally the trend for all the measures is in a positive direction, however the following areas of performance are brought to your attention:

Improved performance:

- a) ED01 to ED06 inclusive: It is notable that all of the planning application and appeal performance indicators have exceeded their set targets over a sustained period of time.
- b) ED07: Building Control performance has remained strong with 100% of building regulation applications having a decision notice issued within the 8 week statutory period.
- c) ED08: Percentage of Land Charges search returns sent within 10 working days is at 96.44%, compared to 83% in the same quarter last year (2017/18).
- d) ED09 Enterprise Zone – Beacon Park: Percentage of empty floor space across Beacon Park (quarterly snapshot). Improvement has been made as empty floor space has dropped from 20.39% (Qtr 2 2017/18) to 15.56% this quarter. Marketing and promotion activities are continually reviewed.

Reduced performance:

- a) None to report.

Data Quality note

All data included in this report for the current financial year is provisional unaudited data and is categorised as management information. All current in-year results may therefore be subject to later revision.

3. FINANCIAL IMPLICATIONS

None

4. RISK IMPLICATIONS

None

5. CONCLUSIONS

The significant improvement in RAG status across most areas is noted.

6. RECOMMENDATIONS

The actions are:

- All measures to be monitored during the next quarter

7. BACKGROUND PAPERS

None





Areas of consideration: e.g. does this report raise any of the following issues and if so how have these been considered/mitigated against?

Area for consideration	Comment
Monitoring Officer Consultation:	N/A
Section 151 Officer Consultation:	N/A
Existing Council Policies:	None
Financial Implications:	None
Legal Implications (including human rights):	None
Risk Implications:	None
Equality Issues/EQIA assessment:	N/A
Crime & Disorder:	N/A
Every Child Matters:	N/A

PERFORMANCE INDICATORS – SUMMARY REPORT QUARTER 2 (Jul - Sept) 2018/19

ECONOMIC DEVELOPMENT COMMITTEE

Measure	Previous Quarter	This Quarter	Target	Qtr 2 2017/18	Status	Trend	
						Last Period	Last Year
ED01: Planning applications: Major applications determined within 13 weeks or as agreed extension (Quarterly Cumulative)	80%	85.7%	75%	100%	G	↑	↓
ED02: Planning applications: Non Major (Minor or Other) applications determined within 8 weeks or as agreed extension (Quarterly Cumulative)	78%	78%	75%	89.5%	G	↔	↓
ED03: Percentage of Major planning applications processed within 13 weeks or as agreed extension over the last 24 months (Quarterly Cumulative)	93%	95%	75%	91.7%	G	↑	↑
ED04: Percentage of Non Major planning applications processed within 8 weeks or as agreed extension over the last 24 months (Quarterly Cumulative)	78.6%	84%	75%	New measure	G	↑	N/A
ED05: Percentage of Major planning applications overturned on appeal over the last 24 months (Quarterly Cumulative)	0%	0.08%	9%	0%	G	↓	↓
ED06: Planning Appeals: Percentage of Non Major Planning applications overturned on appeal over the last 24 months of an authority's total number of decisions on applications (Quarterly Cumulative)	0.69%	0.16%	9%	New measure	G	↑	N/A
ED07: Building Control: The percentage of building regulation applications where a decision notice is issued within the eight week statutory period. (Quarterly Cumulative)	100%	100%	100%	100%	G	↔	↔
ED08: Percentage of Land Charges search returns sent within 10 working days. (Quarterly Cumulative)	97.4%	96.44%	90%	83%	G	↓	↑
ED09: Enterprise Zone: Beacon Park a) % of empty floor space across Beacon Park (Quarterly Snapshot at last day of quarter)	15.56%	15.56%	15%	20.39%	A	↔	↑

Key	
Status	
 G	Current performance has met or exceeded target/ has met or exceeded trend
 A	Current performance is below target but within tolerance/ is below trend but within tolerance
 R	Current performance is below target and tolerance/ is below trend and tolerance
	Contextual information only

Key:

NA = No target set, contextual information only

N/A = Not available/not applicable

Great Yarmouth Town Centre Masterplan - Members Working Group

Minutes

Monday, 08 October 2018 at 14:00

Present:

Councillor Plant (in the Chair), Councillor B Coleman, T Wainwright, B Walker and Williamson.

Councillor Hacon (attended as a substitute for Councillor Stenhouse).

Councillor Bird (attended as a substitute for Councillor K Grey).

David Glason (Development Director), Jane Beck (Head of Property and Asset Management), Claire Sullivan (Project Manager), Kim Balls (Strategic Planner), Toby Matthews (Strategic Planning), Julia Devonshire (Cultural Development Lead) and Karline Smith (Member Services) (Great Yarmouth Borough Council Officers).

David Wardale (Highways Project Engineer), Edward Bown (Senior Engineer), Henry Marshall-Nichols (Senior Graphic Design Consultant NPS Property Consultants Ltd), Jeremy Wiggan (Transport for Norwich) (Norfolk County Council Officers).

1 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors K Grey, Jeal and Stenhouse.

2 DECLARATIONS OF INTEREST

There were no declarations of interest.

3 MINUTES

The minutes of the meeting held on 9 July 2018 were confirmed.

4 PROJECT UPDATE

(i) Improving the Market Place

The Head of Property and Asset Management reported that Hudson's as the lead designers had been asked to produce a design for the Market Place and that they had looked at the current market, the stalls and the canopy. Some of the traders own their stalls but the market place is not flexible and the stalls can not be moved around. In June 2018 a public engagement process had taken place with the traders and had looked at areas such as the location, asking traders what they would like and what the area can deliver. It was reported that the traders would rent and not own their stalls and concern was expressed by traders at the break in trading when they were being moved. The canopy would be clear perspex panels to let the light in. The full regeneration scheme would cost £4m and part of the scheme would cost £2m. The Canopy would be included in the part scheme for the east side.

The traders would move once into a temporary spot and then they would move permanently to their final space. It was reported that there were areas of the market place that it would be difficult to get services to which would remain as fruit and vegetable stalls that didn't require any services to them.

The Council were still awaiting a response to their Coastal Communities Fund bid and it was reported that if this was not successful then they would still be able to carry out the £1.2m reduced scheme.

A traders meeting would be held on 9 October 2018 at 7pm where they would be shown the designs which would then be presented at the next Policy and Resources Committee.

On 27 September 2018 the National Market Traders Federation attended one of the design meetings and they were very supportive of the work that Great Yarmouth Borough Council had carried out with the traders as this was above and beyond what many other authorities in the County had carried out.

A member asked for clarification on whether the traders would be receiving compensation for their capital investment and it was reported that they would receive one or two times their rate-able value. It was also reported that there was an unfairness to the current scheme as some larger stalls were paying the same rents as a smaller stall.

Concern was expressed at the difficulty of disabled people in wheelchairs

being pushed over the cobbles on the market place and could alternative surfaces be looked into and it was reported that there would not be enough funding to pay for a comprehensive re-provision of the public realm.

A member asked if the 2020 capsule could be dug up and saved and it was reported that this was around the centre stone.

(ii) Creating a Sense of Arrival

The Working Group were shown photographs of the new railway station forecourt taking shape. David Wardale spoke about potential compulsory purchase activity and that this would then become part of the scheme but asked if Great Yarmouth Borough Council or Norfolk County Council would prepare and submit the Compulsory Purchase Order. The Chairman asked for clarification on who would own and maintain the site along with what services were under the site.

Trees would be installed in the next two weeks to the Fuller's Hill Roundabout which would require one lane of the roundabout to be closed.

Howard Street would be closed for four weeks from the 5th November for resurfacing.

North Quay outside the Aldi entrance would have work carried out to the carriageway to improve the cycle route.

The Development Director reported that the Council continued to progress the improvement of the roundabouts with the relevant responsible bodies. It was reported that the Fullers Hill roundabout was in the ownership of Norfolk County Council.

Action:- That Great Yarmouth Borough Council would continue to look at the ownership and maintenance of the roundabouts across the Borough and that they would also speak to GYBS to ask them which trees are in the contract to be planted into the Fuller's Hill roundabout.

Market Gates:-

New Bus shelters had been installed. Amey Lighting had been paid to install new LED lighting and this had not been carried out. Clear channel had been asked to bring the electricity cables through to the bus shelters so that they could install lighting to the shelters and the bus arrivals time boards.

Action:- Norfolk County Council EDT be asked to look at the Amey Lighting issue as this had been ongoing for 18 months. Michael Stephenson to be asked for an update on the progress of re-connecting the electricity to the bus shelters by Clear Channel.

Julia Devonshire spoke of the vinyl art work for the pillars under market gates and how this would give either local schools or businesses a space to display

art work.

(iii) Shop Front Improvement Scheme

This is a £60,000 scheme to support shop front improvements and grants are capped at £3,000. There has been £70,000 worth of applications received with £52,000 in approved grants by the Sub Committee. There is currently £17,000 left in funding and the scheme would end in Spring 2019.

It was reported that the scheme had struggled with receiving applications from the King Street area and that they had even had leaflets produced in Portuguese and officers have visited the area but there had still been little interest.

(iv) REVO

The Development Director reported that he had attended the REVO event in Manchester ten days ago and had spoken to cinema operators, architects and town centre specialists who agreed to visit GY.

Hull, Rotherham and Chester Councils had attended to promote their Council's regeneration schemes.

5 WAYFINDING UPDATE

A photo was shown of the first finger post which had been renovated and installed in King Street.

A visualisation of one of the new Megalith signs outside Maritime House was shown and it was reported that one of these was in the Town Hall Foyer for Members to view. A member asked if the Megaliths would show the walking distance to points and it was confirmed that this would. There would be ten Megalith's across the town.

The Working Group were asked if they would like the finger post on the quay to remain black as they would fit in with the colour of the railings and the canopies at the top of Market Row and bottom of Broad Row were currently red along and the working group were asked if they would like these to remain red as this colour scheme followed through Broad Row and Market Gates.

RESOLVED:

That the quay signs remain black and the Market Row / Broad Row iron canopies remain red.

6 WALKING AND CYCLING PROPOSALS

It was reported that there were proposals for a Riverside Road pedestrian scheme and cycling route north of the market place up Fuller Hill towards the Minster and that these were both out to consultation.

7 SIGNAGE PROPOSALS

The working group were tabled a map of the new car parking signs for consultation and were asked to provide comments to the Development Director or the Project Manager.

A Member asked if the King Street Car Park sign could be amended to state King Street and St Georges Car Park as this had previously been agreed. The Chairman asked for signs at the train station directing people to the Market Place.

The meeting ended at: 16:00

Great Yarmouth Transport and Infrastructure Steering Group

Minutes

Wednesday, 26 September 2018 at 14:00

Present :

Councillor K Grey (in the Chair) and Councillor B Coleman

County Councillors Castle and Plant

Mr D Glason (Development Director), Mr I Parkes (Senior Infrastructure Growth Planner), Mr J Wiggin (Transport Development Manager) and Mrs S Wintle (Member Services Officer).

1 APOLOGIES FOR ABSENCE

There were no apologies for absence received.

2 DECLARATIONS OF INTEREST

There were no declarations of interest declared at the meeting.

3 MINUTES

The minutes of the meeting held on the 11 July 2018 were confirmed.

Councillor Plant asked in relation to the Burgh Road to Edison Road matter that had been discussed at the previous meeting and he was advised that this matter was included within the Senior Infrastructure Growth Planner's report detailed within the agenda.

4 GREAT YARMOUTH TRANSPORT STRATEGY

The Steering Group received and considered the Senior Infrastructure Growth Planner's report which set out the work in progress on developing the Great Yarmouth Transport Strategy. The report described the working arrangements, progress to date and what work was being proposed over the next few months.

Members were reminded that at the previous meeting of the Steering Group, Members had considered the draft brief for the development of a transport strategy for Great Yarmouth.

The Senior Infrastructure Growth Planner reported that work on developing the transport strategy was being progressed by WSP who were the consultant partner of Norfolk County Council, although it was noted the steer of the transport strategy would be managed jointly by both Norfolk County Council and Great Yarmouth Borough Council Officers.

It was reported that analysis of the current and future transport problems and issues had been completed and a Stage 1 : issues and opportunities report had now been produced, Members were advised that a copy had been included within the agenda pack.

A Stakeholder workshop had been held on the 14 June 2018 where a vision and set of objectives for the Strategy had been proposed, these had been agreed taking into account comments that had been made by Members and Stakeholder responses. Following consideration of the analysis including feedback received a long list of possible transport schemes had now been drawn up.

The Senior Infrastructure Growth Planner reported that the next steps for this piece of work was to appraise and assess the schemes included on the long list against the vision and objectives that had been set. This assessment would be completed using the Department for Transport's Early Appraisal Sifting Tool and where appropriate transport modelling. Following this a short list will be

produced from which a draft strategy of schemes and measures could be derived, it was hoped that an early draft would be available December 2018.

The Senior Infrastructure Growth Planner asked for Member comments on the draft Strategy.

County Councillor Plant made reference to the schemes detailed for both Vauxhall and Gapton Roundabouts he stated that in his opinion the priority for this area would be to maintain the flow of motorist traffic around the town, he raised some concern in relation to the plan prioritising the area for non motorist traffic as he pointed out that this was the main access road for motorists so the need for free flowing access was imperative. The Senior Infrastructure Growth Planner advised that this matter was still being discussed with Highways England, the Transport Development Team Manager agreed that the key priority for the area needed to be traffic flow.

County Councillor Castle pointed out that there was a need for an exit out of both B and M stores and Lidl on Pasteur Road Great Yarmouth to alleviate the vast amount of traffic building up on Station Road leading onto Southtown Road. He advised that Planning Permission had been granted for this exit route.

County Councillor Castle also raised the need for a bus stop / pull in close to the rail station platform as he advised there had always been issues with buses entering the rail station forecourt, he also felt that a further stop be introduced on the other side of the road to allow access to the train station. County Councillor Plant asked whether the recent introduction of the right hand turn out of this site had seen a positive response from the local Bus Companies, the Transport Development Manager advise that he had a meeting on site at the train station arranged with Ian Rankin, First Bus next week. The Development Director reported that a new bus shelter had recently been erected within the station forecourt.

County Councillor Castle commented that there was also a need to look at the freight sidings adjacent to the A47 as well as highlighting the dualling of the A47 Acle Straight. County Councillor Plant raised some concern and made reference to a mis-leading comment which stated that there were no schemes planned for the A47, as he stated that this was a priority for the A47 alliance through RIS2. Members agreed that there was a need for this wording to be changed.

County Councillor Castle commented that he felt the train service into Great Yarmouth needed to be looked into as there had been a number of cancellations on the line which were continuing, he made reference to the Cambridge line using the town as a connecting link which could ensure train services did not get cancelled. He also pointed out the need to recognise the potential of new homes in and around the town centre and the need for the parking strategy to be stronger.

RESOLVED :

(1) That Members note the contents of the report and associated documents.

(2) That the Strategy be endorsed as amended.

(3) That feedback from Members on schemes to be shortlisted be fed-back to the Senior Infrastructure Growth Planner and Development Director by the 12 October 2018.

(4) An addendum sheet to be tabled at the Economic Development Committee on the 8 October 2018 to reflect the comments.

5 GREAT YARMOUTH LGF SCHEMES UPDATE

The Steering Group considered the Senior Infrastructure Growth Planner's report which set out the progress on the development and delivery of the Great Yarmouth Local Growth Fund Transport schemes funded from the New Anglia Local Enterprise Partnership.

Members were advised the report identified the status of each of the schemes under development, made note of Member views that had been raised previously and set out the next steps.

County Councillor Castle asked whether the exit out of Lidl and B and M could be looked at as part of the Southtown Road / Bridge Road scheme, but he was advised that unfortunately this matter could not be looked at as part of this phasing as it could cause delays to the scheme. The Transport Development Manager reported that in respect of the current scheme in place, ongoing discussions were being held with the owners of the Matalan site as some concern had been raised in relation to the entrance and egress of the site in light of the removal of the traffic signals. It was agreed that a simulation of the works to be completed and the visualisation of how the scheme will work be circulated to all Members.

County Councillor Plant made reference to the proposed introduction of public realm space at the Hall Plain Junction and agreed that there was a need for this improvement, County Councillor Castle commented that there was a need to look at the alternative parking options following this proposal to alleviate any frustrations that may occur.

County Councillor Plant advised that concerns had been raised by the Gorleston Area Committee in relation to the footpath improvements at Riverside Road, it was agreed that the Transport Development Manager provide a response to concerns that had been raised by Area Committee. It was reported that legal advice had been sought in respect of the footpath improvements in light of recent guidance that had been received with respect to partially sighted users.

Reference was made to the Thamesfield Way site and it was reported that

discussions had been held with Ventureforth but to date permission had not been given for use of the road, Members raised concern in relation to this as they felt the benefits of access being re-opened outweighed the negative effects and felt that a possible CPO action would be the best way forward with this scheme.

Members discussed the recently refurbished Bus Shelters under Market Gates, Great Yarmouth and how these were still without power. It was reported that this matter was being addressed. It was pointed out that Clear Channel who had an obligation to supply power to the facility were contracted through the Norfolk County Council and GYB Services, therefore it was agreed that details be sent through to the Development Director to look into this matter.

Members discussed and commented on table 2 within the Senior Infrastructure Planners report which detailed sustainable transport schemes for investigation and implementation in 2019/20 and 2020/21.

The Senior Infrastructure Planner reported that due to ongoing discussions the Vauxhall Gardens proposals would be put on hold until such time land could be secured.

County Councillor Plant asked in relation to pathways in Bradwell and whether these could be considered as part of the scheme as it was noted that these were in poor condition. It was agreed that Councillor Plant send details through to the Senior Infrastructure Planner and that this matter be looked into.

County Councillor Castle suggested that before and after pictures be completed to show how the funding has been spent in and around the town.

Councillor B Coleman asked in respect of weeds at Fullers Hill Roundabout, the Transport Development Manager reported that a planting scheme had been agreed for the roundabout and was to be delivered at the end of October 2018.

Resolved :

(1) That the Steering Group note the contents of the Senior Infrastructure Planner's report.

(2) That approval be given to the confirmation of the schemes and actions to ensure the funds are committed to Great Yarmouth and that none of the funding allocation be returned.

6 A47 HIGHWAYS ENGLAND - ROAD INVESTMENT SCHEME UPDATE

The Steering Group were advised that works were ongoing with Highways England re: Vauxhall, Gapton and Harfreys roundabouts.

7 THIRD RIVER CROSSING UPDATE

The Development Director reported that the consultation process ended Friday 5 October 2018, the exhibition that had been running had seen a good turnout.

Members were advised that the procurement of a contractor for the project would commence in November with an appointment to be made in January 2019.

The Development Director reported that a report would be taken to the Economic Development Committee on the 8 October 2018 which would provide an update on progress so far.

8 A47 / LONGFULANS LANE

The Chairman reported that she had received an email from Hopton Parish Council which had raised concern in respect of outline planning permission being granted for 200 homes at the site and these new homes being given a direct access route to the A47. It was advised that it would be unlikely that a new access road direct to the A47 would be introduced but it was agreed that the Development Director seek clarification on this planning permission from the Development Control and Strategic Planning Department.

9 ANY OTHER BUSINESS

County Councillor Castle asked for the Officer Group to look at the sidings at the Railway Station in order to see if any land could be of use for the A47 dualling of the Acle Straight scheme.

County Councillor Plant reported on Elmhurst Close, Gorleston where there was no crossing available for residents who were predominately elderly between the Middleton Road and Victoria Road Roundabouts. It was felt that this matter should be allocated to the long list of opportunities and issues for transport.

The Chairman raised some concern in respect of the new roundabout layout at Beacon Park where it had been noted that the traffic leaving Gorleston are fed into three lanes but that the markings on the road did not show markings to turn to the right round the roundabout. County Councillor Plant also stated that a keep in lane sign was required at the Fullers Hill Roundabout. It was agreed that these comments be fed back to Highways England.

The meeting ended at: 16:00