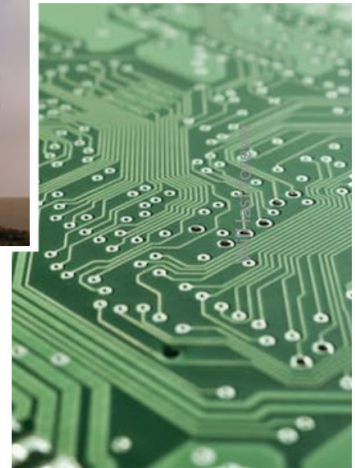


# Strong Roots New Growth

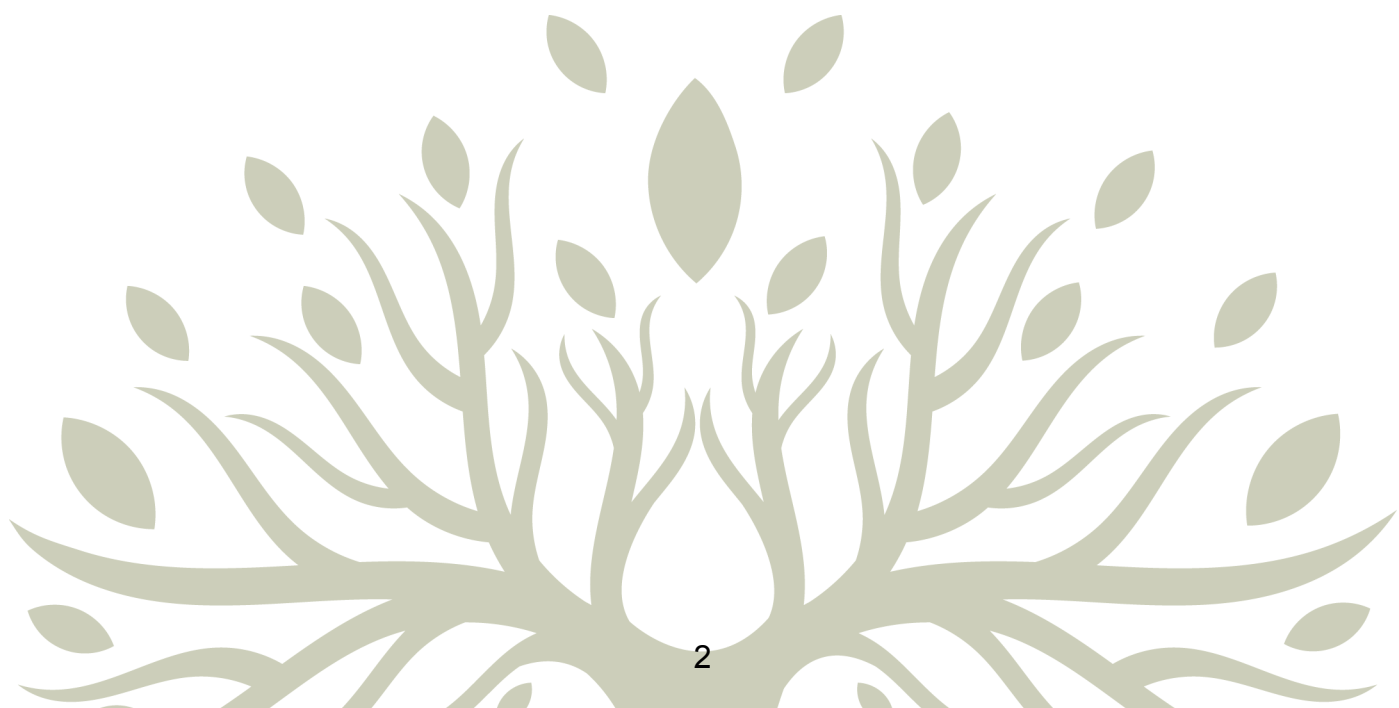
**Norfolk Rural Strategy**  
2017-2020



Supported by:



**Norfolk**  
County Council



# Contents

<b>Acknowledgements</b> .....	4
<b>Executive Summary</b> .....	5
<b>Background</b> .....	9
<b>Defining Rural Norfolk</b> .....	10
<b>The Norfolk Rural Economy in 2017</b> .....	12
Employment Structure.....	12
Wages.....	14
Skills.....	15
<b>Major Opportunities and Challenges facing Rural Norfolk by 2020</b> .....	18
Opportunities and Challenges: The Strategic Context .....	19
Opportunities and Challenges: Brexit.....	21
Opportunities and Challenges: National Living Wage .....	26
Opportunities and Challenges: New Technology .....	28
<b>Proposed Actions for 2017-2020</b> .....	30
Vision and Lobbying for Support for Rural Development .....	31
World Class Environment.....	32
Technology Driven .....	34
AgriFood Competitiveness .....	35
Enablers of Growth .....	36
<b>Funding</b> .....	39
<b>Annex 1—Delivery of the Norfolk Rural Strategy 2013-2017</b> .....	42
<b>Annex 2—Rural Strategy Steering Group</b> .....	49
<b>References</b> .....	50



## Acknowledgements

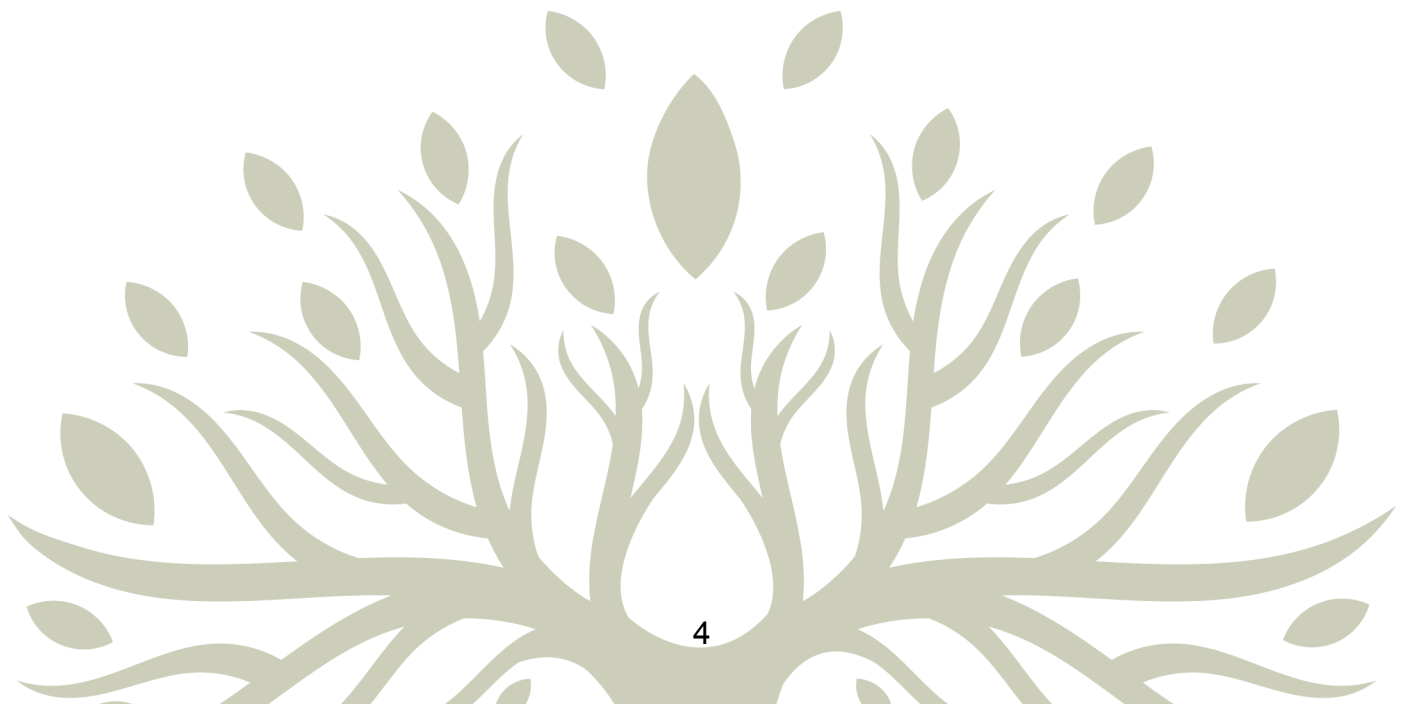
The Norfolk Rural Strategy Steering Group would like to thank the more than 50 organisations, businesses and individuals from across the public and private sectors, who were interviewed for Strong Roots, New Growth, the Norfolk Rural Strategy 2017-2020.

The consultees represented the health and care, agrifood, rural land and estates, ICT, technology, tourism, environmental management, education and skills, finance and business support, logistics and distribution sectors.

The Steering Group would also like to thank Norfolk County Council for supporting the development of this strategy.



**Norfolk**  
County Council



## Executive summary

**Rural Norfolk is a good place to live, work and visit, but like other areas is having to respond to rapid change. If this change is embraced, rural Norfolk can continue to grow its economy, build on recent successes and thrive in the future.**

Since the original Norfolk Rural Development Strategy was published in 2013, the UK has voted to leave the EU, the government introduced the National Living Wage in 2016 and technology has advanced rapidly and is affecting every area of how we live and work. All of these changes will have major impacts on the economy in rural Norfolk.

The Norfolk Rural Strategy Steering Group therefore commissioned a refresh of the strategy to identify the priority areas on

which we think the Norfolk rural community, businesses and the agencies which support rural Norfolk, will have to focus between now and 2020.

The consultations informing this Strategy, and the discussions of the Steering Group, show a strong consensus on the main challenges facing rural Norfolk by 2020. Our focus on these challenges has informed our five identified priorities which are:



### Vision and Lobbying for Support

To promote a clear vision for Rural Norfolk's future growth and to lobby for the support needed to facilitate sustainable rural development:

#### WHY

Brexit will change the funding landscape for farming, the environment and rural development and change Norfolk's trading relationships. The government is focused on an Industrial Strategy prioritising investment in high growth sectors with global potential.

#### WHAT

Rural Norfolk needs to proactively promote its ability to generate growth for the wider economy. This includes making the case for continued investment in rural areas as the country develops new UK economic programmes.





## World Class Environment

To attract visitors, workers and investors through investment in the environment which align with Norfolk's specific needs:

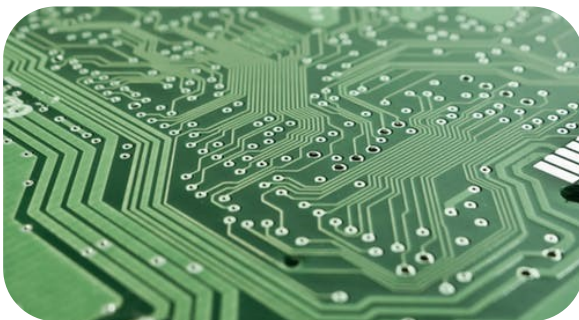
### WHY

Norfolk has a growing and successful tourism sector built on a diverse, attractive environment. Changes in environmental funding, farming and rising tourist expectations create an opportunity to reimagine Norfolk's rural environment to benefit the economy.



### WHAT

There needs to be more focus on developing links between distinctive Norfolk landscapes and tourism, food and cultural development to make rural Norfolk an attractive destination for high value tourism and talented new workers.



## Technology Driven

By using technology to transform the Norfolk rural economy and lifestyles through digitalisation, automation and innovation:

### WHY

The National Living Wage will increase many rural workers' wages, but this will also increase the wage costs of many employers in the public and private sector, creating challenges for business viability and putting major pressure on public sector budgets (e.g. in social care). At the same time Brexit will potentially restrict labour supply for rural employers. Developing innovation in technology and improving connectivity also bring opportunities to create new industries.

### WHAT

Rural Norfolk has to focus on using new technology to improve labour efficiency in both the public and private sector. This includes a focus on raising skill levels, improving rural career prospects and creating more rewarding rural jobs so that careers in rural Norfolk are attractive to young people and people moving to Norfolk.



## AgriFood Competitiveness



To help Norfolk's agrifood industry to compete by focusing on productivity, supply chain efficiency and through responding to consumers' needs:

### WHY

Agricultural policy and support is expected to see its largest change in over 40 years and many current farm business models may become unviable. However, global demand for food is rising strongly and the UK's expertise in adding value beyond the farmgate is in growing demand around the world.

### WHAT

Norfolk's agrifood sector has to become more competitive to thrive in the global market with less support. This requires a focus on: adding value to farm output to embrace growth food markets; delivering productivity growth in farms and food companies; and, through more efficient supply chains.



## Enablers of Growth

To facilitate growth in rural Norfolk through modern water, ICT and energy infrastructure and an enabling planning system:

### WHY

At a time of unprecedented change, there needs to be even more emphasis on having an approach to rural development which is open to change, encourages business investment and facilitates growth through modern infrastructure.

### WHAT

An enabling planning system which prioritises affordable housing and business premises supported with modern power, water and communication infrastructure is essential to rural Norfolk's future growth.





# Strong Roots New Growth

Norfolk Rural Strategy 2017-2020

One further, cross cutting issue was seen as essential by consultees – rural Norfolk has relatively low qualification levels, which particularly at a time of rapid change could restrict its ability to embrace future opportunities.

If we are to deliver new environmental programmes, embrace the potential of technology, improve agri-food competitiveness or find new ways to deliver modern infrastructure, we will all, young and

old, have to learn new skills. Upskilling our existing workforce and making rural areas attractive to highly skilled young people is therefore essential if these areas are to fulfil their potential.

The Norfolk Rural Strategy Group cannot action all these areas on its own as it has neither the time or resources to do so. Instead we look forward to working with others to drive all five priority areas forward for the benefit of rural Norfolk.

## Clarke Willis

MBE, ARAgS, Chair of the Norfolk Rural Strategy Steering Group



[www.norfolk.gov.uk/ruralstrategy](http://www.norfolk.gov.uk/ruralstrategy)

Supported by:



**Norfolk**  
County Council





## Background

The Norfolk Rural Development Strategy<sup>1</sup> was published by the private-sector led Norfolk Rural Development Steering Group in 2013 to support sustainable growth in the rural economy. The Strategy was accompanied by a dataset to provide the evidence to support its priorities. Since 2013, the Norfolk Rural Strategy Steering Group has worked on a number of project initiatives to support delivery. Notable successes include:

- £9m LEADER funding secured for 5 LEADER Groups in Norfolk and North Suffolk and £1.4m European Social Fund rural skills and employability project in the same area;
- The establishment of the Digital Divide Group – led by Anglia Farmers, with the support of the Steering Group, has made considerable progress in raising the profile of broadband and mobile issues in rural areas and brokering solutions with providers.
- The Silver Pound Conference held in May 2016 – this high profile conference focused on inspiring businesses to capitalise on the spending power of older people in rural Norfolk.
- Community Land Trusts (CLT) workshop in November 2016 – run in partnership with North Norfolk District Council and Community Action Norfolk to generate new CLT projects in areas with a shortage of affordable housing.

Despite this progress we know that there is a still a great deal that needs to be done to support the sustainable development of rural Norfolk. Since 2013, the rural context has continued to change, through demographic change and new technology.

Whilst some of this was anticipated in 2013, the speed of change in technology has been accelerating and new technologies, which were only at the concept stage in 2013, such as self-driving vehicles and the Internet of Things (IoT), will become well established by 2020 or very soon afterwards. Rural Norfolk must prepare for these changes.

There have also been significant changes which were unforeseen in 2013, notably the Brexit vote and the National Living Wage. Both will impact on labour supply and skill needs in rural areas, with migration constraints leading to challenges on labour supply at the same time as wage costs rise and technology becomes cheaper and more flexible. With high employment rates, but low average wages, the Norfolk rural economy will change rapidly and higher skilled jobs can help to raise wage levels for our workers.

For over 30 years farm incomes, most environmental, workforce skills and innovation funding programmes have been supported by EU programmes. As the UK exits the EU and develops UK programmes, it is essential these programmes meet the needs of rural Norfolk.

This revised strategy therefore looks at these changes, reviews the impact they will have on Rural Norfolk between now and 2020 and identifies ways in which we can work together to embrace future opportunities.



## Defining Rural Norfolk



CopyRight: <https://www.holidaycottages.co.uk>

The definition of rural as opposed to urban settlements is a contentious area in which administrative boundaries and population densities interact. The official result can be surprising for many living in 'rural areas', for example residents of Blickling, Foulsham or Salhouse in Broadland may not expect to find that their district is officially classified as an 'urban' district, with a supplementary descriptor of 'with significant rural'. This is because Broadland district contains parts of the Norwich suburbs and thus a large urban population.

National rural definitions<sup>2</sup> categorises settlements into:

- Urban, with further sub-divisions of: 'not sparse' major conurbations; minor conurbations; cities and towns, and cities and towns in a sparse setting;
- Rural which is divided into both: 'not sparse' and 'in a sparse setting', with both then further sub-divided into: town and fringe; villages; hamlets and isolated dwellings.

The national definition regards any settlement of over 10,000 people as urban, but also considers some larger settlements with 10-30,000 people as 'hub towns' where they serve a wider rural hinterland as service and business centres.

In developing this rural strategy consultees stressed that this national definition does not reflect the reality of Norfolk's economy or social structures and, that in practice, Norfolk only has one truly urban area, in Norwich.

Consultees argued that the larger towns such as Great Yarmouth, Thetford and Kings Lynn, whilst larger than the hubs towns definition set out nationally, act as service and

employment centres for predominantly rural populations. Their scale as larger market towns and service centres is thus inextricably linked to their position at the heart of much larger rural areas which depend upon them for services and employment.

The Norfolk Rural Strategy Steering Group has therefore adopted the position that for the purposes of this strategy all of Norfolk is considered to be rural with the exception of the Norwich built up area. In making the case for investment, it is the combined potential of Norfolk's rural areas and market towns which can deliver the growth needed to attract investment.



# The Norfolk Rural Economy in 2017

The Norfolk Rural Development Strategy published in 2013 incorporated a significant dataset and research exercise as the evidence base for its findings. In developing this new Strategy, we have reviewed and updated some of the original key findings.

The original Norfolk Rural Development Strategy<sup>3</sup> noted that: the rural economy provides 44% of Norfolk's jobs but is home to 53% of the population with many rural people commuting to towns or cities to work. This increases pressure on roads and affects community viability because these workers access retail and other services whilst at work.

## Employment structure

The economic mix of Norfolk's rural and urban areas is very similar as reported in detail in the dataset accompanying the original strategy, with every Norfolk district having:

- 26-30% of jobs in the public sector (where job numbers are projected to fall);
- 33-40% in building, wholesale, retail, transport, storage, accommodation and catering;
- 4-6% in arts, entertainment and recreation.

The main differences in the economic mix between Norfolk's urban and rural districts are:

- Primary industries (e.g. energy, agriculture) are concentrated in rural & coastal areas;
- Manufacturing is concentrated in rural areas (e.g. 14% of the workforce in Breckland against 6% in Norwich);
- In contrast Norwich, has the most people (21%) employed in (higher wage) business and professional services, at nearly double the rate found in some rural districts.



Rural Norfolk's strengths in the agriculture and food sector are long standing, with a large and diverse farming industry, the UK's largest single research centre supporting the sector at Norwich Research Park and a broadly based food industry. There is however, scope to expand food processing given the fact that Norfolk's share of farming is double that of its national share of food processing, suggesting the potential to add value to more of the food grown in the county.

Tourism in Norfolk is a strong sector, with anecdotal evidence suggesting 2017 may be a record year due to the low value of sterling, the growth in short breaks and developments such as glamping for which Norfolk is ideally suited.

The 2014 Cool Tourism<sup>4</sup> reports estimated that the Norfolk tourism sector saw spending of just under £2billion after attracting nearly 40million visitors. The local market is focused on day trips but staying visitors spend more per head. Also notable is that the largest spend for visitors was food and drink at 36%, which is above the national average and which provides a clear benefit to the rural economy if sourced locally.

Consultee feedback suggests that whilst Norfolk has major attractions, there is

potential to create additional new attractions including, in particular, wet weather venues or out of season experiences to extend the season.

More recent economic analysis has shown that how staff are employed in Norfolk shows significant spatial differences. Contract or 'gang labour' employed via temporary employment agencies<sup>5</sup> is particularly prevalent in the rural centre of the county and West Norfolk, where the food manufacturing sector and intensive crops are both large sectors.

District level data is poor in showing this (as most employment agencies operate across district boundaries), but whilst at national level 2.7% of the workforce are employed by temporary employment agencies, it is 10.5% of the workforce in Breckland (the 7<sup>th</sup> highest rate nationally).

A 2017 Localis report<sup>6</sup> identified Norfolk as having four of its seven districts in the 'stuck category' - 'the thirty most structurally challenged local economics in England, which perform poorly on multiple indicators, both long term demographic trends and more immediate short term economic performance'. All these 'stuck' districts are rural and/or coastal: Great Yarmouth; Kings Lynn & West Norfolk; North Norfolk; South Norfolk.

## Wages

Norfolk wages are on average (median) only 91% of the national level based on residency and 89% for workplace<sup>7</sup>, showing that there is a net outmigration to higher paid jobs in other counties. A Resolution Foundation Report<sup>8</sup> (January 2016), looked at 33 cities nationally and found that the National Living Wage would have the highest impact in Norwich, where it estimated that 32% of the workforce were expected to be affected by the National Living Wage (NLW) by 2020.

However, more detailed analysis shows that the underperformance from the national wage level is much greater in some rural districts in Norfolk than in Norwich. Whilst average hourly wages in Norwich<sup>9</sup> are £12.13 for male full time staff (8% lower than the English average) and £10.83 for female full time staff (16% lower than the English average), wages for both males and females are much lower in some rural districts, for example:

- In Breckland male full time staff earned on average £11.79/hour in 2016 (14% below the England average) and £11.03/hour in North Norfolk (20% below the England average);
- In Great Yarmouth female full time staff earned on average £9.20/hour in 2016 (29% below the England average) and in North Norfolk £9.71/hour (25% below the England average).

Clearly the expectation must therefore be that the NLW will have even more impact in Norfolk's rural districts than in Norwich, e.g. in Great Yarmouth where average female wages are only just above the target £9/hour NLW for 2020, nearly half the female workforce could be expected to be directly affected.

Whilst at first sight this is positive for workers,

the low qualification levels in these workforces mean that many staff are potentially unprepared to deliver the productivity increases employers are likely to demand as wages rise.

With robotic costs falling, potential restrictions on labour supply (following Brexit) and low borrowing costs, this makes the widespread adoption of robotics very likely over the next decade. The Guardian recently summarised IPPR research (2017) on robotics by saying: 'The IPPR research<sup>10</sup> said that in four sectors alone – retail, hospitality, transport and manufacturing – 5m jobs were at risk, adding that a particular concern to ministers should be industries ripe for automation with a high proportion of workers least able to adapt'.

The Norfolk rural economy is over-represented in manufacturing, hospitality and



care sectors, all of which have large numbers of relatively low paid, low skilled jobs, with the added complication in tourism and hospitality of seasonality and part time working. These industries have no alternative but to automate to retain their competitiveness through

improved productivity. The challenge this creates is that whilst new jobs will be created, to integrate, install, maintain and manage automation, the new jobs will demand new or higher skill levels, which many of the workers displaced by robots currently lack.

## Skills

Workforce qualification levels of residents across Norfolk are generally below the national average, except for Norwich and South Norfolk which both perform slightly above the national average level<sup>11</sup>.

In all other districts qualification levels are significantly lower than the national average, with particular problems in Great Yarmouth with 22.9% and in Kings Lynn & West Norfolk (KLWN) with 25.1% qualified to L4+ against 37.9% nationally. This problem is also true at the other end of the spectrum, with 25.7% of those in KLWN with no (or other) qualification and 22.1% in Great Yarmouth, compared to only 14.5% nationally.

New Anglia has a net outflow of students to access Higher Education, with HEFCE<sup>12</sup> showing that whilst the outflow has fallen from over 10,500 in 2008-09 to 8,500 in 2013/14, it is still much higher than comparator LEP areas. Over half of those who leave New Anglia to study went to London, Cambridgeshire and Essex. However, recent evidence shows many do eventually return, later in adult life.

As work roles change, this over-representation of employees with low qualifications is a growing problem. UKCES report<sup>13</sup> that the proportion of staff employed in elementary occupations in Norfolk's traditionally strong agri food sector, will have

halved from 26% in 2004 to a predicted 13% by 2024. In contrast the proportion in skilled trades which was 40% in 2004 is expected to reach 59% by 2024.

Local projections for future demand for agrifood skills is also focused on higher skills levels, with the net demand (including replacement demand) for new staff across New Anglia over the period 2014-'24 estimated to be:

- Over 600 for QCF8 (Doctorate) level staff;
- Over 6,700 for higher technical and professional staff (QCF4-6 - HNCs, FD, degrees);
- 4,500 for jobs requiring lower levels of qualifications (+2,000 for QCF3; +2,500 for QCF2)
- No net increase in demand for QCF 1 and a fall in the number of jobs for those with no qualifications<sup>14</sup>.

Unless we address poor qualification levels, local residents will not be ready to take up new opportunities and rural businesses and employers will not have access to the right

talent for their businesses to grow.

The table below highlights some of the skills challenges in Norfolk’s rural districts.

**Table 1 Skills levels of Norfolk Districts<sup>15</sup>**

District	Highest qualification by % of residents age 16-64				
	No /other qualifications	L1	L2	L3	L4+
<b>Breckland</b>	16.6	12.1	18.3	22.8	30.2
<b>Broadland</b>	15.1	15.7	21.7	18.9	28.6
<b>Great Yarmouth</b>	22.1	25.2	18.2	11.6	22.9
<b>Kings Lynn &amp; West Norfolk</b>	25.7	12.1	15.1	22.0	25.1
<b>North Norfolk</b>	13.9	22.4	19.8	16.1	27.8
<b>Norwich</b>	13.5	12.4	16.8	18.6	38.7
<b>South Norfolk</b>	9.5	9.4	18.6	20.7	41.8
<b>England</b>	14.5	11.3	17.5	18.8	37.9

With reports and analyses, as with the New Anglia report on the sectoral skills needs of the AgriFood Tech sector, showing that the increase in demand for skills will be concentrated at the higher level, the relative under-performance in qualification levels in most rural Norfolk districts is a major concern. As shown in table 1, L4+ qualification levels as a percentage of the workforce are generally much lower than the national or Norwich level, with Great Yarmouth, Kings Lynn and West Norfolk, and North Norfolk having 28% or less of their workforce qualified to Level 4+, compared to 38% across England.

The lack of qualifications and the challenges this creates in securing employment is clearly shown in the Social Mobility Index published in 2016<sup>16</sup>, which identified that 6

districts in Norfolk were in the lowest 20% for ‘social mobility’<sup>17</sup>, of all districts in the country. Norwich at 2<sup>nd</sup> worst in the country was joined by Breckland at 19<sup>th</sup>, Great Yarmouth at 28<sup>th</sup>, Kings Lynn and West Norfolk at 32<sup>nd</sup> and North Norfolk at 45<sup>th</sup> on the list.

Skills and a breadth of economic opportunity are at the core of social mobility and our consultation showed that skills shortages are impeding growth in Norfolk businesses. The lack of rural public transport, affordable housing and other infrastructure issues can also inhibit social mobility as well as restricting the talent pool available to rural employers.

The Rural Strategy Steering Group sees these rural challenges as important ones for





the Local Enterprise Partnership and local authorities to focus on in the New Anglia Economic Strategy and the local plans which feed into this. For example, it is important that the LEP's skills strategy clearly recognises the additional challenges facing the rural economy due to poor qualification attainment in rural areas and the issues faced by rural people in accessing skills provision. The Steering Group will contribute to these discussions and actions through lobbying and by highlighting specific rural issues.






# Major Opportunities and Challenges facing Rural Norfolk by 2020


## Summary


Since 2013 the UK has seen major changes in the context for economic growth. While trends like demographic change tend to be relatively easy to predict, other changes, such as those which arise from political decisions or new technology, are much harder to anticipate or plan for.

The impact of three major changes were therefore consulted on in developing this strategy, given that they were either not anticipated in 2013, or have changed quickly since 2013. What unites all three is that they have the potential to have major implications for the rural economy in Norfolk by 2020.

These changes, which are explored in more detail in the following section, are:

 **Brexit** – the vote to leave the EU is significant to rural Norfolk given: the large annual investments made by EU funding in rural areas and uncertainty about what might replace this; impacts on the UK's trading relationships overseas; and, the large number of EU migrants working in rural Norfolk;

 **National Living Wage (NLW)** – very low unemployment and low wages mean Norfolk's rural workforce and employers are in the frontline of the changes the NLW will lead to;

 **Technology** – whilst technology change was not unexpected, the speed at which digital technology is developing accelerated over the period 2013-'17, particularly in the use of sensors, the Internet of Things (IoT) and 'big data'. This has implications for how we work, travel, manage the environment and access services.

These changes also need to be seen against the backdrop of considerable political change in the last 2 years, creating a period of uncertainty in future policy. During this time the economy has remained strong with unemployment at a thirty year low, continuing job creation and economic growth. Consultees, however, reported that many companies are now delaying investment decisions due to uncertainty and it is therefore important to create a compelling case for investment focused on the potential of new and growing markets in the UK and overseas.

## Opportunities and Challenges: the Strategic Context

In considering these macro-economic changes the Strategy is focused on their impact on the Norfolk rural economy and how this will in turn affect rural communities and the environment. Furthermore, in considering how rural Norfolk meets these challenges it is important to align the proposed interventions with regional e.g. New Anglia LEP and national policy.

The CLA<sup>18</sup> reported in 2016 that the rural economy employs 3.4 million people across England and Wales, in 650,000 businesses and contributed £229 billion in GVA.

The CLA report showed that investment in the rural economy in 2015 was estimated at £1.8 billion in the East of England, the third largest regional figure nationally after the South East and South West both of which invested £2.2 billion in 2015. The investment level in the East has been maintained since 2012, growing by 2%, but this is lower than nationally where the period 2012-'15 saw a rise of 38% in investment, but from a lower base.

Whilst the reason for this slower growth in investment levels in the East relative to other regions is unclear, it is believed that it may be due to a big increase in investment before 2012, when agricultural prices rose rapidly from summer 2007 and, a tailing off as they moderated after this.

To sustain growth of the rural economy the CLA report stressed that it is essential to look at skills and infrastructure (particularly digital connectivity), so that the rural economy can embrace the labour productivity gains of the

Internet of Things (IoT), automation and other new technologies so that the quality and rewards of rural employment increase.

### UK Industrial Strategy

The forthcoming UK Industrial Strategy, as set out in a Green Paper<sup>19</sup> in January 2017, challenged sectors and localities to develop investment plans to deliver growth backed by industry and the wider community. The Industrial Strategy is based on 10 pillars (see table 2) which focus investment on ideas and innovation, business growth, people and skills and wider enabling infrastructure.

**Table 2 Industrial Strategy Pillars (HMG 2017)**

- Investing in science, research & innovation
- Developing skills
- Upgrading infrastructure
- Supporting businesses to start & grow
- Improving procurement
- Encouraging trade & inward investment
- Delivering affordable energy & clean growth
- Cultivating world-leading sectors
- Driving growth across the whole country
- Creating the right local institutions

The Industrial Strategy is also, in concept, linked to the idea of Smart Specialisation, a process which was initially aligned with EU investment decisions through structural funds and which was designed to encourage regions to identify a few high growth opportunities, based on knowledge clusters, business strengths and local specialisms to drive growth.

The East of England Science and Innovation Audit<sup>20</sup> published in autumn 2017 identified four themes for the East of England to focus on to promote Smart Specialisation: AgriTech; Life Sciences; ICT; Advanced Manufacturing and Materials.

Furthermore the SIA highlighted that the real potential lays in the overlap between these sectors, e.g. the use of ICT in human health

(life sciences) or advanced manufacturing technologies in the agrifood sector. With strengths and growing demand in all four of these priority themes and experience in linking up between sectors, rural Norfolk is well placed to help deliver regional growth.

Linked to the Industrial Strategy the government has invited bids for sector deals, led by industry. The government has also commissioned reviews on priority areas such as an Industrial Digitalisation Review (IDR), which is looking at how investment in digital technologies can be used across a wide range of sectors to drive competitiveness. In addition to the IDR other early sector deals are being developed for the: creative industries; life sciences; automotive; nuclear.

## New Anglia Economic Strategy

The forthcoming New Anglia Economic Strategy (due to be published in autumn 2017) will promote similar themes and specifically the need for knowledge-led growth, a focus on moving up the value chain, the potential in the tourism sector and the need to embrace technology. All five proposed New Anglia Economic Strategy themes are relevant to Norfolk's rural areas and this Rural Strategy's action plan:

- Our offer to the World stresses the need to develop global links and attract global talent;
- Driving Business Growth and Productivity stresses the need to move up the value chain, increase productivity and support business growth;



- Driving Inclusion and Skills stresses the need to raise skills levels across the workforce and amongst young people to help the economy embrace change;
- Collaborate to Grow stresses the need to look beyond the LEP to access markets and expertise and to develop infrastructure which links the area regionally and beyond;
- Competitive Clusters, Close to Global Centres stresses the need to build on our clusters in areas such as ICT, digital, life sciences and biotech are closely aligned with this strategy.

## Opportunities and Challenges: Brexit

More than any other area Brexit was seen by consultees as a very significant change for Norfolk's rural areas because of the role, over 45 years, of the EU in determining how rural Norfolk's land is managed, whether it is used for environmental purposes or agriculture.

In recent decades the EU has also been the source of many of the rural workforce in both the public and private sector and many employers reported that they are already struggling to find the workers needed in the aftermath of the Brexit vote.

The EU is the UK's largest trading partner and historic ties between Norfolk and the countries bordering the North Sea are longstanding and strong.

### Common Agricultural Policy (CAP) support for Norfolk Farms & Environment

**EU funding has underpinned agricultural incomes for 2 generations and most environmental, rural development, workforce skills and large innovation funding programmes have also been supported by EU programmes. As the UK exits the EU and develops new UK programmes, it is essential that the replacement UK schemes meet rural Norfolk's needs.**

Norfolk farmland covers 410,000 hectares

(2007-2013)<sup>21</sup>. The Basic Payment Scheme rate is €175.27/hectare with a linked Greening Payment of €77.71/hectare, giving a total of €252.98/hectare<sup>22</sup>. At current exchange rates for 2017 payments of 1.12€/£ this will equate to a 2017 payment of circa £225.88/hectare before any deductions.

Thus agricultural payments in Norfolk are estimated at about £93m in 2017. In addition it is believed that funding of continuing environmental schemes (ELS, HLS and woodland schemes<sup>23</sup>) adds in excess of £20m per annum to this total.

Given that Norfolk farming is estimated to have a farmgate turnover of circa £1,200m

(DEFRA 2016), any changes to support payments, which currently total £110m, could have major implications for the viability of many Norfolk farming businesses.

The CAP is also the major source of environmental grants for landscape management, with for example Norfolk Wildlife Trust receiving over £1m per year to manage land in Norfolk for agricultural and conservation purposes<sup>24</sup>. With other major conservation bodies such as the RSPB, National Trust, Wildfowl and Wetlands Trusts, as well as private landowners, also claiming for environmental management, Norfolk's environmental management is currently dependent on the CAP.

Whilst future UK agricultural and environment policies are not yet developed, the expectation of consultees for this strategy is that post Brexit direct support for agriculture will fall, but may be maintained for environmental management. The government committed in 2017 to maintain the current agricultural support system until 2022, but beyond this has recently signalled that it expects to make significant changes.

If agricultural support is reduced, consultees believed that a period of significant restructuring is likely as they estimated that 60-70% of Norfolk farming businesses are unviable in their current form without support. The consensus is that farming businesses will respond to a changing funding landscape in one of the following ways:

- Expand through acquisition or joint venture to secure economies of scale
- Focus on new markets through diversification into niche products or rural tourism

- Embrace environmental management programmes or provision of ecosystem services.



## European Union

### Other EU Funding

**Through successful lobbying and the case made in the previous Norfolk Rural Development Strategy, Norfolk has a high allocation of rural development funding under the LEADER programme of £9m. Through the New Anglia LEP allocation Norfolk businesses also have access to £13m of Rural Growth Programme funding administered by Defra. These funds bring significant capital investment directly into rural businesses, leveraging 60% or more match funding from the businesses themselves.**

The LEADER programme, administered by Norfolk County Council, with decisions made by community-based Local Action Groups, demonstrates a high level of impact in rural areas where local knowledge helps target support effectively. This approach is also being used to support local rural skills and employability delivery through the LIFT Programme, which seeks to target support where it is most needed using rural networks and local delivery.

Over the period 2007-'20 the New Anglia

area<sup>25</sup> will also receive an estimated £135m per annum of EU funding for other purposes (R&D, transport, skills, knowledge transfer, major capital projects) and, whilst no reliable breakdown of the split between rural and urban areas is available, rural Norfolk contains over 25% of New Anglia's population and thus this investment is believed to be in the order of £30-40m per annum.

Clearly a major concern for many businesses, community groups and environmental bodies is that when UK programmes are developed to replace EU funding, the needs of rural areas such as Norfolk must be clearly recognised in the replacement programmes. It will be important to promote the need to support rural economic growth across all business sectors.



The success of LEADER in our area can support this case, but lobbying will be needed to show the impact that focused, locally delivered capital grants can have on communities and/or local supply chains, creating real jobs in rural areas.

**Investment in rural businesses and projects is important to the future prosperity of rural Norfolk as it helps**

**these communities to embrace change and ensures that they continue to grow by investing in new companies, new products and services and through supply chain enhancements.**

A challenge for many rural communities is that they can have a relatively limited range of economic opportunities and therefore using funding to support even a modest increase in the number and type of companies can have a big impact on the options available to local workers.

Investing in tourism projects has a local economic multiplier as visitors attracted by the new facility or accommodation which a grant is used to support, also spend money on other local products and services. Tourists visit areas which provide a range of facilities and thus investing in a new tourist attraction can have consequential positive benefits for local accommodation, food and service providers.

The economic multiplier is also very significant in strong rural industries such as the food chain, where improvements in agricultural productivity and sustainability lead to benefits which cascade down the supply chain. With GVA of the food chain from end to end being more than ten times greater than in agriculture alone<sup>26</sup>, capturing more of this value in the local economy by helping farmers or small food companies invest in adding value, marketing or catering brings substantial new economic benefits to the community.

Similarly investing in the production of natural products or the development of renewable biomass energy plants, has created new markets for products produced by farmers or land managers. Not only does this create new income streams for farmers

and land managers, but in for example the management of Norfolk reed, the harvesting process is an essential part of habitat management and thus benefits biodiversity and the tourism industry which depends on a healthy natural environment.

**Investing in new technology, such as the Better Broadband for Norfolk (BBfN) programme to facilitate rural community wide improvements in access to technology can have a transformative impact right across the rural community, benefitting businesses, households and residents.** Whilst it can be difficult to fully quantify these benefits, the effects are long lasting, lead to consequential positive changes in the economy and improve quality of life and social inclusion.

## Trade

**Rural Norfolk has more manufacturing than the national average or Norwich as a percentage of its workforce and therefore has real interest in the export of manufactured products.** The largest export sectors in Norfolk are machinery and transport (35% of total exports) - with South Norfolk the most important district for these exports, with chemicals and healthcare in 2<sup>nd</sup> place (24% of total exports) and Breckland as the most important district for these products. In the food industry (11% of total exports) Kings Lynn and West Norfolk has the most trade of any Norfolk district and in minerals and energy exports (7% of total exports), Great Yarmouth is the most important district<sup>27</sup>.

**The New Anglia AgriFood Tech sector exported £479m in 2015, with £300m going to the EU and £179m elsewhere<sup>28</sup>.**

**At 17% of LEP area exports the sector is more important to exports than in comparator LEP areas (Felixstowe in Suffolk is very important in this sector).**

Tourism is a significant UK sector which generates export earnings (through visitors to the UK). However, locally the market for overseas tourists is relatively under-developed in Norfolk with only 6% of staying visitors, 12% of visitor nights and 12% of total staying visitor spend (£75m) in 2013 coming from overseas visitors<sup>29</sup>.

This shows that overseas visitors who come to Norfolk stay for longer than UK visitors and thus spend more per person, but compared to the national industry there is scope to increase overseas visitor numbers and spend. Major rural attractions such as the Broads and Norfolk coast could be instrumental in delivering this.

The future trade relationship with Europe is currently unclear, but government is making trade with the EU and the rest of the world a major theme in how the UK responds to Brexit and thus the rural economy needs to consider how it can increase its trade potential.





Growth in the global economy is concentrated outside of Europe and it is therefore important for the Norfolk rural economy to look at markets across the world. For example, **Norfolk's food sector produces high quality, traceable food products which could exploit the fact that global food expenditure is growing at 6% per annum<sup>30</sup>, with the growth concentrated in markets across Asia, Africa and Latin America.**

There is also potential in some sectors e.g. intensive crops or livestock to replace imports, but to deliver this successfully future trade deals must ensure that UK producers are not undercut by production in other countries which does not abide by the high production standards in the UK. Embracing UK sourcing in the public sector could help to facilitate import substitution as promoted by the UK government in its plan for public procurement (2014)<sup>31</sup>.

## Labour Supply

**A report in August 2017<sup>32</sup> stated that of 2m EU migrants employed in the UK, 400,000, or 20%, work in the food chain.** In UK food processing 30% of the workforce are migrants and when asked how they would cope with a restriction on labour supply, 55% of employers stated they would automate, 50% would try to recruit more local staff, but worryingly 36% claimed it would make their business unviable and 17% said they would relocate overseas.

**New Anglia LEP in work for its new Economic Strategy has reported that 20% of the LEP's agrifood workforce were migrants compared to 10% nationally and over 25% in its manufacturing sector**

**compared to 13% in this sector nationally.**

In April 2017 the EFRA Select Committee<sup>33</sup> reported on its inquiry into agrifood labour supply that: 'evidence submitted to this inquiry suggests the current problem is in danger of becoming a crisis if urgent measures are not taken to fill the gaps in labour supply'. In June 2017 the Resolution Foundation<sup>34</sup> reported that employers' views on the need for future migration showed most of those who currently employ migrants wanted this to continue despite clear policy signals from government that change will occur.

In the health and care sector, employers reported major staffing shortages and a UK report in June 2017<sup>35</sup> suggested EU nurse recruitment has fallen by over 90% since the Brexit vote. Given that growth of the elderly population is concentrated in rural areas, Norfolk will need more care staff for an ageing population and this is a significant challenge for local health and social care employers operating in rural Norfolk. Consultees reported that pressure on staff availability for both high skilled and lower skilled roles in the care sector, from care assistants to GPs, is restricting service provision and the situation has been deteriorating.

Faced with labour supply challenges across many rural employment sectors, employers, technology suppliers and business support services are reporting a big increase in interest in technology which increases labour productivity. In the commercial sector this is mainly focused on robotics, but consultees report that the need to find technological alternatives to labour is more challenging but no less urgent in sectors such as health and social care.



Consultees were also very clear that technology adoption will challenge our collective ability to acquire the skills needed fast enough. It is felt that whilst many young people are aware of the potential of technology, many existing workers are unprepared for the rapid changes which are likely to occur. If

technology is to be embraced, both new workers leaving education and the established workforce must be supported to acquire the skills needed for the coming technology revolution.

## Opportunities and Challenges: National Living Wage

The introduction of the National Living Wage (NLW), pension auto-enrolment, the apprenticeship levy and linked rises in National Insurance costs, will collectively add 30-40% to the cost of employing staff originally on the old minimum wage.

Norwich was identified as the most affected by the NLW out of 33 cities in the country according to a report from the Resolution Foundation (2016)<sup>36</sup> with over a third of all jobs directly affected. **However, as the table**

**below shows, Norfolk's more rural districts such as Breckland, Great Yarmouth and North Norfolk, typically had lower wages than Norwich, suggesting the impact in rural Norfolk will be even higher.**

With the average rate for female staff in Great Yarmouth in 2016 only just over the suggested 2020 target of £9 per hour, this suggests that about half of the female workforce in Great Yarmouth are affected by

**Table 3 Wages in Norfolk Districts<sup>37</sup>**

District	Average weekly full time wage 2015 (£)	Resident average wages per hour 2016	
		Male (£)	Female (£)
Breckland	419	11.79	10.13
Broadland	527	14.04	11.48
Great Yarmouth	518	12.70	9.20
Kings Lynn & W Norf.	468	12.48	11.45
North Norfolk	442	11.03	9.71
Norwich	470	12.13	10.83
South Norfolk	534	14.90	12.34

Unpublished work by Collison Associates (2017)<sup>38</sup> for Greater Lincolnshire LEP has estimated that the NLW will by 2020 increase wage costs in the UK food chain by £7.5-10 billion per annum.

In a sector with a turnover of just over £200 billion, this magnitude of wage cost pressure will create a major incentive to improve labour productivity.

In the care sector consultees reported that the sector is at a tipping point in which rises in wage costs are at risk of destabilising the whole system because budgets are not increasing fast enough to compensate private and public sector providers for the increase in costs.

## Potential Impacts on the Rural Workforce



The NLW cannot be seen in isolation from the potential restrictions on labour supply, due to Brexit, and the increased use of technology which is becoming both more flexible and affordable. Taken together these factors are likely to place a real emphasis from employers on increasing labour productivity:

- In low paid public sector employment such as care, budget pressures mean that efficiency gains will have to be made to avoid the 'system' failing, with new technology and working practices needed;
- In the private sector employers will invest in automation to manage wage costs and remain competitive.

**Low paid rural workers will potentially gain above inflation rises in wages as a result of these changes, but it could create challenges for those without the skills to take on new higher skilled, higher paid jobs and means that increased investment in addressing rural under-performance in qualification rates is essential.**

Reports have suggested that these changes will lead to a very rapid change in the workforce with Institute for Public Policy Research suggesting that (IPPR 2017)<sup>39</sup>: in four sectors alone – retail, hospitality, transport and manufacturing – 5m jobs are at risk, adding that a particular concern to ministers should be industries ripe for automation with a high proportion of workers likely to be unable to adapt. These four sectors are all important to the rural Norfolk economy, with manufacturing particularly strongly represented in the rural workforce compared to the economy as a whole.

In responding to this change the role of new style apprenticeships, which can be taken by all ages, is important to help the existing workforce gain the skills needed, although the minimum qualification requirements for taking an apprenticeship will be a challenge to some. The Lift Programme<sup>40</sup> has been

supported by the European Social Fund to provide grants to rural skills and employability projects in Norfolk which support those lacking basic skills, older workers, those with disabilities and others facing barriers to employment, to help them acquire the skills needed for the changes being seen in the employment market.

**Addressing training and education challenges so that existing and future rural workers have the skills needed to embrace change is essential.** In doing this the Norfolk Rural Strategy Group will work with New Anglia LEP to support the delivery of its skills strategy, with specialist rural providers such as Easton and Otley College, as well as all training providers who work with rural areas.

## Opportunities and Challenges: New technology



Technology is developing very rapidly and allowing more processes to be cost effectively automated. At the same time Brexit is potentially reducing migration and staff supply and wage cost pressures created by the NLW are increasing staff costs for many employers. Taken together these factors are creating incentives to replace low cost labour with investment in labour productivity through automation in businesses and the public sector.

The reduction in the cost of sensors, an explosion in the availability of data, artificial intelligence (AI) and robotics, are already beginning to transform many industries, with some reports arguing that a 1/3<sup>rd</sup> of current jobs are at risk of automation by 2035.

**Consultees welcomed the progress which has been made on broadband provision in rural Norfolk in recent years, but felt that too many premises still lack access to superfast broadband.** Furthermore, the development of the Internet of Things (IoT) and rapid increases in urban broadband speeds (now over 100MB in many urban areas) means that continued investment in both fixed line and mobile broadband is essential if rural areas are to be able to exploit the potential of technology.

Adopting new technology in response to these challenges is positive as it will increase productivity, addressing a major strategic challenge for the UK and, in turn, this will facilitate higher rural wages, particularly at

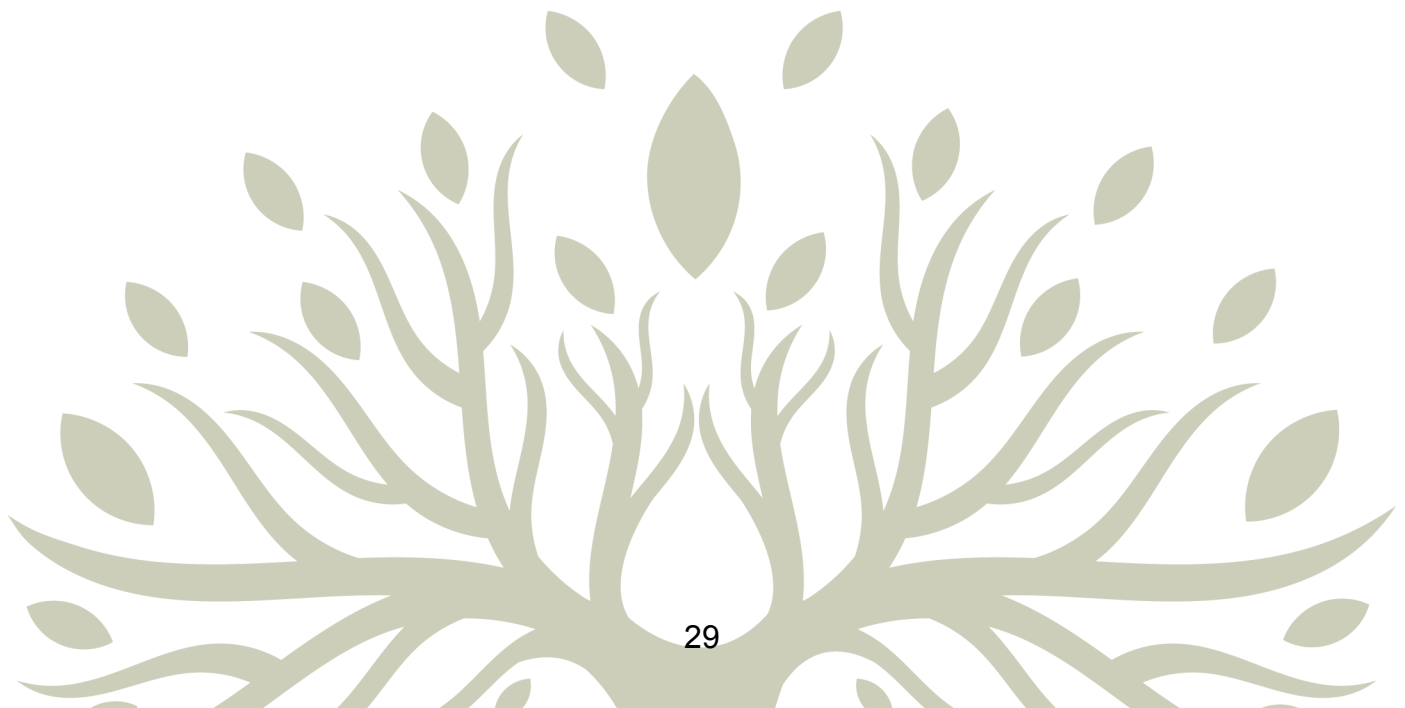
the lower end of the jobs market. However, facilitating a transition to a higher skilled, higher wage economy will require a step change in upskilling in the rural Norfolk workforce to equip them with the skills to embrace the new jobs created by technology adoption.

**Consultees were optimistic that Norfolk could take a lead in many areas of new technology, but felt that to do so it was important to develop enhanced links between the world class science and technology base at UEA, Hethel and NRP and rural employers in the public and private sector.**

Programmes focused on applied research to develop new technology, such as those run by Innovate UK, should be complimented with support for early adopters who implement new technology commercially as supported by the current Rural Growth

Programme. Consultees reported that the Eastern AgriTech Initiative, which combines support for applied research with capital grants to help early adopters of new technology, so that the region both develops and commercialises innovation was a well-structured programme which, due to its local management, was very well focused on local needs.

In addition the Steering Group will work with New Anglia LEP to facilitate the delivery of its new Economic Strategy's technology focus and champion cross cutting needs linked to this such as rural skills by aligning with the LEP skills strategy. On the skills challenges it will also work with local providers such as Easton and Otley College, College of West Anglia and East Coast College, who are targeting training in areas including agrifood, technology, engineering and energy for the technicians needed to drive change in the rural economy.



## Proposed Actions for 2017-2020

The county and its rural areas face a series of overlapping challenges and the expectation is that the next 3-4 years will see major changes in the rural economy. Norfolk and its rural areas are not alone in facing these changes and so it is important to be

proactive in our response. The Rural Strategy Steering Group believes that Norfolk should seek to lead change rather than be forced to respond after the event and focuses on five areas where we believe our partnership approach can have most impact:

-  **Vision and Lobbying for Support** – to promote a clear vision for Rural Norfolk’s future growth and to lobby for the support needed to facilitate sustainable rural development;
-  **World Class Environment** - to develop and implement a vision for investment in the environment which aligns with Norfolk’s specific needs and enables Norfolk to attract more visitors, workers and investors;
-  **Technology Driven** – by using technology to transform the Norfolk rural economy, improve job quality and lifestyles through digitalisation, automation and innovation;
-  **AgriFood Competitiveness** – to help Norfolk’s agrifood industry to compete by focusing on productivity, supply chain efficiency and through responding to consumers’ needs;
-  **Enablers of Growth** – to facilitate growth in rural Norfolk by developing partnerships which support the development of modern water, ICT and energy infrastructure and an enabling planning system.



Rural Strategy Steering Group:  
Vision & lobbying for support

**World class environment**

**Technology driven**

**Agrifood competitiveness**

**Enablers of growth**



## Vision and Lobbying for Support for Rural Development



**Rural Norfolk should exploit future growth opportunities by embracing technology-led growth, creating a world-class environment to live, work and visit and delivering a competitive land-based sector**

### Rationale

The government is promoting more devolution to local areas, but much of the emphasis is being placed on city regions and major urban areas. It is important to have a clear vision for rural Norfolk's sustainable economic growth and to use every opportunity to promote this from local to national level.

### Key Influencing Opportunities

In delivering the Rural Strategy the Steering Group will seek to ensure that rural issues and needs are clearly recognised and acted upon at every level from local (district and borough), through the County to Local Enterprise Partnership (LEP) and national levels.

Whilst it is anticipated that the processes and programmes the group will need to engage with will continue to evolve, key initial areas which the group wish to influence include:

- The **Shared Prosperity Fund** will be developed during 2017/18 to replace EU Structural Funds and the Local Growth Fund. It is anticipated that it will become the major UK administered fund to support business investment, workforce skills, innovation and actions on sustainability at regional and local level. It is important to ensure that the needs and aspirations of progressive rural areas like Norfolk are recognised in this new fund.
- Plans were announced in the Queen's Speech 2017 to develop a new **UK Agricultural Policy** in 2018 and, given the importance of this sector to the Norfolk rural economy, it is important that the Steering Group feeds into this process to ensure that the new UK policy supports a modern productive agriculture and food chain in Norfolk.
- The DEFRA Secretary of State has also reaffirmed DEFRA's commitment to develop a **UK 25 Year Environment Plan** and given its history of environmental

innovation, Norfolk should seek to play a direct role in helping to shape this policy.

- The **Industrial Strategy** is at the heart of the government's plans to prepare the economy for exiting the EU and to drive competitiveness. Rural Norfolk should ensure that it both understands and inputs into this emerging strategy. Of particular relevance are sector deals, which whilst in most cases national or regional, will have a direct impact on

local development such as the deals proposed for agriculture, food and digitalisation.

Within Norfolk the Steering Group will work with New Anglia LEP, councils and other agencies to ensure that local delivery plans respond to the key priorities in the Rural Strategy. In 2017/18 the development of the Implementation Plans for the forthcoming New Anglia Economic Strategy provides a clear way to engage at this level.

## World Class Environment



**Rural Norfolk will lead new models of integrated environmental management which make the area an attractive place to live, work and visit**

### Rationale

Support for environmental management will change markedly given that most funding for countryside and landscape management (EAFRD) and the policy which underpins it currently comes from Europe. Given that the resultant landscape underpins the rural tourism sector, proactive action in this area is needed to ensure positive environmental work continues and meets the needs of rural Norfolk's distinctive habitats and landscapes.

Norfolk's rural environment has a key role to play in making the county an attractive place to live and work for the entrepreneurs, professionals and employees needed to drive a vibrant economy. To make Norfolk even more attractive the combination of its landscape, natural heritage and its rural products and services, whether distinctive food products, crafts or rural cultural activities and events, are essential ingredients of its appeal to people and visitors.



## Proposed actions

To deliver action in ways which are good for the environment and people it is essential that future environment policy recognises and supports Norfolk's distinctive natural habitats and heritage and works in conjunction with other major influences on the rural environment such as agricultural policy. Norfolk should argue for devolution of the management of environmental schemes to the local level, possibly using a 'LEADER type' model, whereby local stakeholders agree a Local Environmental Plan which, once approved, receives national funding but is delivered through a local partnership.



Norfolk should use its landscape and habitats to drive socio-economic outcomes through optimising the role of the natural environment in health and wellbeing for both local people and visitors. This will require new approaches and a commitment to deliver:

- **Landscape scale environmental schemes** covering multiple landowners to deliver integrated large scale improvements which support public access, tourism and economic opportunities e.g. a landscape which integrates boating, cycling and walking

routes with food, drink, cultural and accommodation facilities to drive high value visits;

- **Additional investment in habitats and landscape features** which have multi-functional socio-economic benefits, such as forestry and wetlands, by focusing on creating new landscape scale features in areas where agricultural change and tourism demand may facilitate a new economic future for these areas;
- **Additional major annual cultural events** which celebrate or draw on Norfolk's rural cultural and landscape heritage so that higher value tourists and visitors are attracted to Norfolk;
- **New major facilities** which are attractive to residents and visitors.

## Leadership and delivery

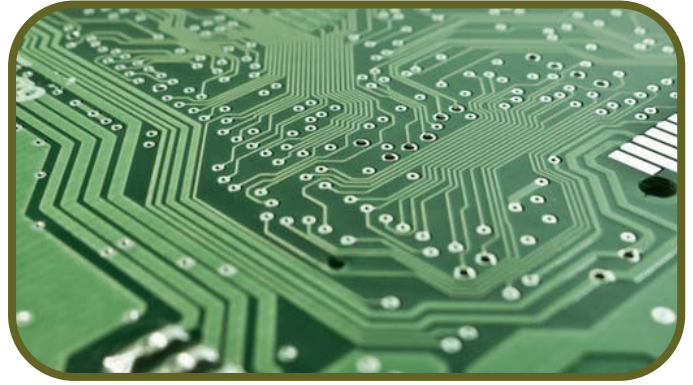
The Steering Group will work with Visit Norfolk, Broads Authority, Forestry Commission, Natural England, LEADER groups and FWAG to make the case for integrated investment in the rural environment and to support projects.

## Resources

There is a need to ensure that the new Shared Prosperity Fund, or other replacement for EAFRD, supports investment in Norfolk's rural environment through schemes which support Norfolk's distinctive landscapes, cultural and tourism offer.



## Technology Driven



**Rural Norfolk will aim to be an exemplar for how technology can be used to support the growth of high value jobs in a leading 21st Century rural economy**

### Rationale

Technology is set to transform how people work, travel and access services. If rural Norfolk wishes to remain competitive it is essential to embrace the opportunities offered by technology to deliver higher value, more skilled jobs with improved wages. Digitalisation, automation and the use of innovative science and technology will disrupt many established businesses and ways of working in the next decade.

### Proposed actions

Economic investment support should prioritise investment in technology-enabled jobs which pay at or above the living wage<sup>41</sup> as defined by the Living Wage Foundation, currently £8.45 per hour. This will reduce dependency on benefits through higher wages and encourage investment in productivity growth.

Automation, robotics and the Internet of Things (IoT) are set to transform the economy in the next decade and rural Norfolk needs to be at the forefront of these

changes. The crossover between technology areas e.g. using digital technologies to address life science challenges in health care have the potential to radically change health provision.

Delivery of technology-led growth should include helping Norfolk create new technologies as well as facilitating take up of technologies developed elsewhere. It should help existing companies adopt new technology, promote start ups and spinouts and attract innovative companies or entrepreneurs to invest in Norfolk. In delivering technology-led change three linked interventions are needed:

- **Facilitate collaborative R&D with industry** to take innovative products and services to market through demonstration to scale up and commercialisation;
- **Demonstrate new technology and upskill rural employees** in the use of new technology through visits, events and training;
- **Incentivise the adoption of technology**, especially for early

adopters, through grants, business integration support and other incentives.

The Eastern AgriTech Initiative has adopted much of this model alongside AgriTech East and this could be extended to other sectors in the rural economy where innovation and new technology is urgently needed e.g. to address the challenges of providing health and care services to the rapidly growing elderly population.

## Leadership and delivery

The Steering Group will work with the UEA, NRP, Hethel Innovation, Colleges, New

Anglia LEP and innovative companies to support the development of rural innovation support projects and to celebrate success and best practice.

## Resources

The Steering Group should work to ensure that current investment programmes such as LEADER, the forthcoming Shared Prosperity Fund and other funding programmes invest in technology-led projects in the rural economy and the delivery of public services.

## AgriFood Competitiveness



**Rural Norfolk will build on its longstanding role as an agricultural and food innovator to ensure the competitive of its agrifood businesses in delivering a new UK agriculture and food policy**

## Rationale

The market for the agrifood sector continues to grow in the UK and globally and Norfolk has a track record as an agricultural innovator. However, changes to the support available for farming as we move towards a

UK Agricultural Strategy, a growing emphasis on adding value to food beyond the farmgate and the need to be globally competitive post-Brexit means a step change in competitiveness is needed.

Current farming systems in many parts of



Norfolk may need to change radically if, as many farmers expect, the move to a UK Agricultural Policy is used to make big changes to agricultural support. Farms will either need to become more productive, develop new higher value products integrated into the food chain or bioeconomy, or change direction and focus on delivering a landscape which is attractive to visitors and which enhances biodiversity.

## Proposed actions

Norfolk needs to focus on large scale, collaborative schemes and programmes which can make a substantial difference to the county's agrifood industry as it adapts to significant change. Action should focus on five areas:

- **Promoting the use of agricultural and food technologies** with a particular focus on the use of automation, engineering and data to increase labour productivity in the sector;
- **Supporting projects which add value to food grown** or reared in Norfolk so that the agrifood sector benefits from growth in consumer spending on convenience and food service. This will include a focus on growing the export potential of the industry;
- **Supporting projects which seek to improve supply chain efficiency** so that Norfolk food and drink can cost effectively access new markets. This requires scale and major investments of the type envisaged in the Greater Norwich Food Enterprise Zone;
- **Securing sustainable water**

**resources** to help the industry adapt to climate change and switch to higher value crops in which the UK is a net importer and where demand is rising. There remains a need to focus on water efficiency and to ensure that national policy recognises the need for water supplies for agriculture;

- **Developing landscape scale programmes** in areas where farming is less viable, to integrate investment in environmental management and access programmes by groups of landowners with tourism facilities and attractions. This should include the production of niche or distinctive food, drink and natural products which draw on landscape heritage.

## Leadership and delivery

The Steering Group will work with the NFU, CLA, New Anglia LEP Food, Drink and Agriculture Board, Greater Norwich FEZ and Norwich Research Park to promote a more competitive agrifood sector. It will work with the team delivering the *World Class Environment* theme on the delivery of landscape scale programmes.

## Resources

LEADER, EAFRD and future farming, food and environmental funds should be targeted to support these actions, with Norfolk seeking to outperform in its success in attracting national funds to Norfolk for these themes. The County should also be proactive in working to attract inward investment into its agrifood sector.



## Enablers of Growth

**Rural Norfolk needs targeted investment in modern water, energy and communications infrastructure to ensure that its businesses and communities have the physical facilities to support growth**

### Rationale

Competition to attract development is increasing and most businesses and organisations have choices over where they invest. Rural Norfolk has to ensure that it competes with other areas to attract investment to deliver high value jobs through an enabling planning system facilitating sustainable development of commercial facilities and affordable housing, supported with modern infrastructure including connectivity (broadband, mobile phones, roads), water and energy. It is important to ensure that infrastructure and planning meets the future needs of rural areas, particularly new types of jobs and the growth of new sectors, rather than seeing rural areas as only suitable for 'traditional rural' industries.

### Proposed actions

The Steering Group will focus on working with partners and programmes which promote growth including:

- **Digital connectivity** - this has been

championed by the Digital Divide group working alongside the delivery of enhanced broadband facilitated by BDUK and the County Council. This group should continue to ensure that as technology and speeds continue to rise, the public and private sectors work together to invest in digital connectivity with the aspiration that rural areas should have the same accessibility as urban areas.

- **Transport** - by lobbying for continued investment in roads, rail and cycleways and footpaths which serve rural areas and which connect rural facilities and businesses.
- **Ambitious spatial programmes** - the Steering Group and partners will support the development of spatial programmes such as the A11 Technology Corridor, which is using the newly dualled A11 route to stimulate growth between Norwich and Cambridge.
- **Electricity** - transformation of the way power is produced, distributed and



consumed is accelerating, but many developers report that access to grid capacity is a constraint in rural areas. This needs addressing by strategic engagement with UK Power Networks (UKPN) to secure a commitment to enable growth and support ambitious rural projects.

- **Water** - water supply is a major constraint in rural Norfolk with the pressure on resources expected to grow due to new housing, increased farm demand, climate change and the need to improve water quality. Anglian Water's Water Resources East programme (WRE) is addressing these issues and Norfolk should work with WRE to trial integrated approaches to water management which unite water supply and flood prevention.

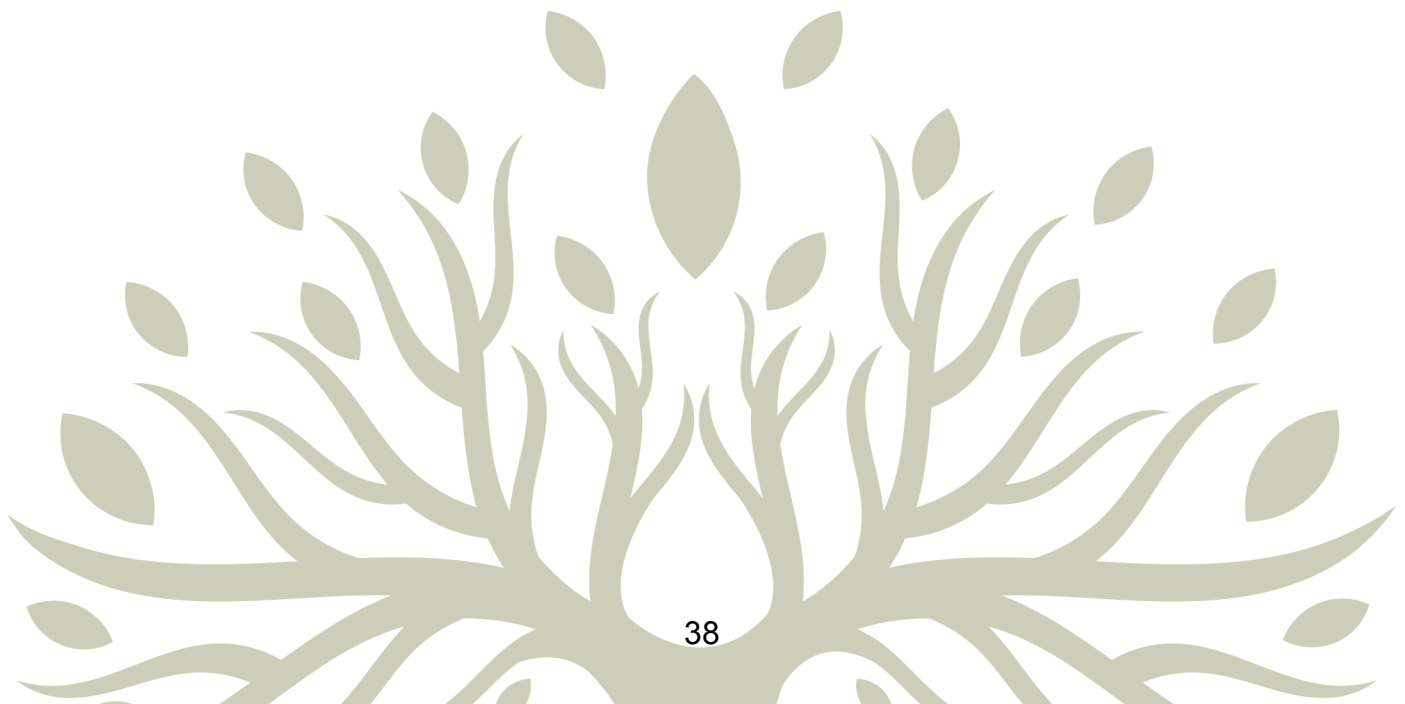
On planning and affordable housing the Steering Group will support groups which work on these areas including the CLA, FSB and Chambers of Commerce.

## Leadership and delivery

The Steering Group will work with partners across the public and private sectors to make the case for enabling rural infrastructure and for investment in programmes to support sustainable development. The Steering Group will focus activity on areas where its networks and partnership approach are likely to have the highest impact.

## Resources

This action will primarily be delivered by the Steering Group working with partners to seek collaborative solutions to rural infrastructure challenges and to support the effective prioritisation of the available resources.



## Funding

To enable delivery of the ambitions set out in this action plan it will be necessary to secure funding opportunities and to ensure that funding delivers optimal benefits. The principles underpinning this include:

- **Proactively secure funding** – the LEP, Councils, public sector, businesses and third sector groups, should work together to bid for more funding for rural Norfolk. This is becoming more important as government moves away from grants allocated to all areas on a formula basis, to one in which national funds are targeted on those areas which produce the best bids. Unless rural Norfolk invests in developing winning proposals most funding is likely to go to other areas. This work will include making the case for the economic value of investing in rural economic growth – the case studies published alongside this strategy are a starting point for this advocacy.



- **Deliver rural projects using ‘non-rural’ specific funds** – Norfolk should take the lead in ensuring that non-rural

specific funding programmes are delivered effectively in a rural context. For example the Network for East Anglian Collaborative Outreach (NEACO) programme which targets increased participation in Higher Education, whilst not rural specific funding, in Norfolk has a strong focus on increased participation from rural and coastal wards which have some of the lowest HE participation rates in the country. This type of initiative should be positively encouraged.

- **Seek to pilot new national rural schemes** – Norfolk should seek to develop and promote potential new national rural programmes and pilot them before wider roll out. This could include both what funds target e.g. scale and/or project focus, or how they are delivered e.g. locally administered environmental funds targeting specific landscapes. It could also include taking established successful models e.g. the Eastern AgriTech Initiative and applying it to additional sectors where a similar approach could have a major impact on rural areas such as innovations in the care sector.
- **Project scale** – Norfolk should support a variety of projects, large and small, but given the scale of the challenge facing rural communities in the next few years a greater focus in future needs to be placed on supporting large transformative projects. Whether it is helping food companies develop overseas markets, new technology

projects, developing new events or major leisure facilities, rural Norfolk must embrace larger projects. For example major tourism events can bring tens of millions of benefit to the economy and the Greater Norwich Food Enterprise Zone is projected to create thousands of jobs. These types of larger projects can have a major and lasting effect and should be prioritised in funding programmes.

- **Promote and facilitate funding bids** – by investing in help for projects to understand how funding can assist them and to facilitate them in accessing local, regional and national funding. Subject to the final deal negotiated with Europe, collaborative European projects in areas such as applied research where it is believed the UK will still work with the EU should also be prioritised to help develop the knowledge economy.

This can all be summed up as being ambitious for rural Norfolk's ability to bid for and use funds effectively.

But, in addition to securing funding for rural Norfolk's development, it is also important to focus funding interventions so that they deliver the optimum benefit for rural Norfolk, by supporting the priorities for rural development outlined above.

To do this the recommended focus is:

- **Productivity** - grants should focus on productivity growth rather than job creation as the key need in rural Norfolk is for higher quality employment, which commands higher wages or which allows future investment;

- **Wage levels** - only support projects which create jobs which pay at least the Living Wage Foundation recommended rate, currently £8.45, because below this level projects are reinforcing the focus on low paid employment in rural areas which is bad for employees and the community, and will create a significant longer term problem for project sustainability given the move to increase the National Living Wage;
- **Technology-led and high value** - focus on creating new companies, products and services which exploit new technology, add value to existing products (food, for example) and which create a sustainable high value tourism offer;
- **Underpinning infrastructure** – support projects which help businesses secure the infrastructure resources needed for expansion. Such projects might require improved capacity (e.g. reservoirs or local energy generation) and/or improved efficiency;



- **Areas in which Norfolk can take a lead** – for example new ways to address long term and elderly care, or the agritech sector, build on major needs in Norfolk, but are also issues for



other parts of the UK and globally. Local investment and taking a lead in areas with the most potential can create new companies and exportable products and services;

- **Collaboration** – both between businesses and between community projects, with a recognition that in some cases dispersed, non-contiguous partnerships can deliver real benefits. In funding projects, the Steering Group and its partners should promote and nurture projects which try innovative collaborative solutions, for example a

programme for non-contiguous Market Towns to work together to solve common issues, or as proposed earlier, landscape scale partnerships of land managers and stakeholders who collaborate on environmental programmes.

In all these areas, innovation and skills development are essential and as well as investment directly in projects, rural Norfolk must participate in and proactively encourage projects which create the step change in **skills and innovation** intensity needed to deliver growth.



# Annex 1 - Delivery of the Norfolk Rural Strategy 2013-2017

Since the Norfolk Rural Development Strategy in 2013 the Norfolk Rural Development Steering Group has worked on a number of project initiatives aimed at supporting delivery. Notable activities which illustrate the breadth of the work undertaken, include:

- £9m LEADER funding secured for 5 LEADER Groups in Norfolk and North Suffolk and support for bids to other national and EU rural funding programmes;
- The establishment of the Digital Divide Group – led by Anglia Farmers, with the support of the Steering Group, to promote mobile and fixed line connectivity;
- The Silver Pound Conference held in May 2016 focused on inspiring businesses to capitalise on the spending power of older people in rural Norfolk;
- A Community Land Trusts (CLT) workshop November 2016 – run in partnership with North Norfolk District Council and Community Action Norfolk to generate new CLT projects in areas with a shortage of affordable housing.

These activities illustrate the role the Steering Group and the Strategy has played in securing funding for rural Norfolk, championing important rural issues such as digital connectivity and challenging communities and businesses to consider new markets or ways of working to deliver benefits for rural Norfolk. These activities have been supported with other workshops on issues such as skills, rural planning and investment, all of which have brought together those delivering these agendas with the Steering Group.

## LEADER funding

LEADER is an EU funded bottom-up community-led approach to rural development which is initiated in each 7 year funding period by a competitive process which makes LEADER allocations to discrete rural territories which set out a convincing case for development.

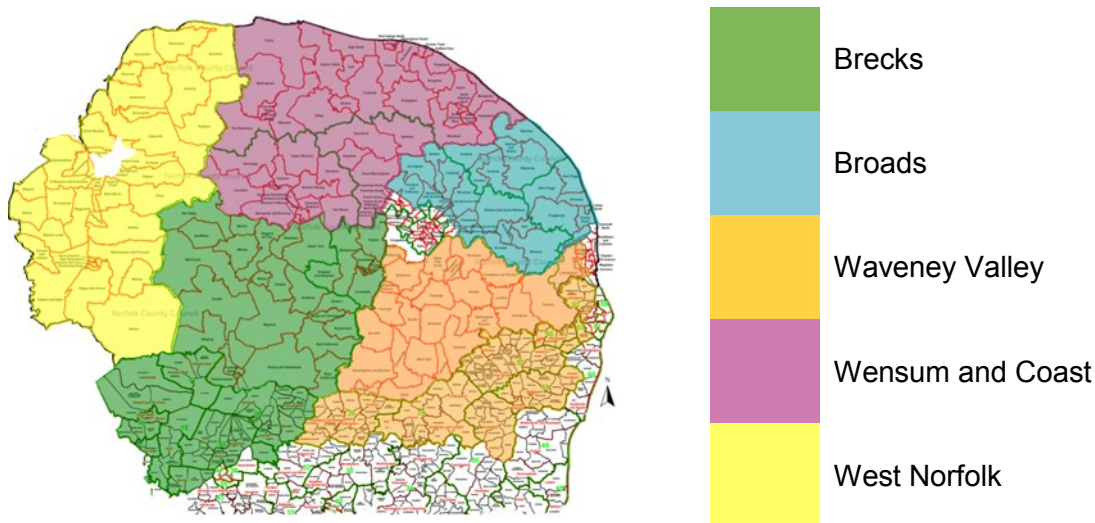
Norfolk was successful in the 2014-'20 programme in bidding for five LEADER groups giving it complete coverage of rural Norfolk (and small areas of North Suffolk).

We have among the most comprehensive coverage in the country, and a large allocation across our 5 LEADER areas of £9m to invest. The original Norfolk Rural Development Strategy provided the clarity of vision and data to support this success.

The current LEADER programme in Norfolk as initially for the period to 2015-'20. However,

national delays in opening the programme and the subsequent decision to leave the EU means that the programme did not open for applications until late 2015 and it is anticipated it will close to new applicants in March 2019, giving a much shorter delivery period. In the previous 2007-2013 programme, LEADER funding of £6.3m in Norfolk supported 136 rural projects, including expanding 45 micro enterprises, helping 19 farms to diversify and assisting 20 projects in their projects to improve water efficient.

**Map 1 Norfolk LEADER Groups 2014-'20<sup>42</sup>**



By August 2017 the current programme had approved projects with a grant value of £1.36million and had a further £3.91m of projects in development (see table A1).

**Table A1 LEADER Funding 2014-'20 Commitments in Norfolk – as at 7<sup>th</sup> August 2017<sup>43</sup>**  
(by LEADER theme and % of total commitment and pipeline to date)

LEADER theme	Approved		'Pipeline' projects <sup>44</sup>		Total	
1. Farm Productivity	£276,037	20%	£373,122	10%	£649,159	12%
2. Farm Diversification/ Micro & Small Business	£657,729	48%	£1,820,649	47%	£2,478,378	47%
3. Tourism	£114,950	8%	£1,045,941	27%	£1,160,891	22%
4. Rural Services	£271,240	20%	£287,431	7%	£558,671	11%
5. Culture/Heritage	£0	0%	£382,900	10%	£382,900	7%
6. Forestry	£37,278	3%	£0	0%	£37,278	1%
<b>TOTAL</b>	<b>£1,357,234</b>		<b>£3,910,043</b>		<b>£5,267,277</b>	

Taking approved and pipeline projects together<sup>45</sup> Norfolk is making rapid progress in allocating LEADER funding and on current progress can expect to allocate all funds well before the programme end (assumed to be March 2019). Government indicated in summer 2017 that LEADER groups which have allocated most of their funding by autumn 2017 will be able to apply for additional funds as long as they have a clear plan to allocate these funds to projects by spring 2019. At least two of the Norfolk and North Suffolk LEADER groups expect to be in this position.

In the current programme most approved projects initially focused on three of the six LEADER themes: farm productivity; farm diversification, micro and small business investments; rural services. The pipeline shows a slightly more balanced portfolio emerging with a big increase in tourism projects and projects under the culture and heritage theme.

## Other Rural Funding

A report on other EU Funding for New Anglia LEP in February 2017<sup>46</sup> identified a wide range of other EU funding coming into Norfolk and Suffolk over the period from 2007.

In addition to LEADER funding it identified 318 Norfolk rural businesses that benefitted from the European Agricultural Fund for Rural Development (EAFRD) Growth Programme over the programme period 2007-'13. These companies received £32m of grant funding towards projects with a total value of £67m.

Of the other EAFRD funding secured approximately 80% was focused on Priority 1: Improving the Competitiveness of the Agricultural and Forestry Sectors and 20% on Priority 2: Quality of Life in Rural Areas and Diversification of the Rural Economy (NB priority 2 funding received directly from the national programme was broadly similar to that secured via priority 3: LEADER).

In the current 2014-'20 programme New Anglia has an indicative £13m available for EAFRD Rural Growth Programme projects in food processing, business development and tourism infrastructure, one of the highest allocations nationally.

In July 2017 DEFRA announced the next £200m of national rural funding focused on<sup>47</sup>:

- £30m to help provide rural broadband at speeds of over 30Mbps where this is not available or planned and supplement existing DCMS investment in rural broadband.
- £45m to help rural businesses grow and invest in new equipment – rural businesses, including in tourism and food production.

- £120m for projects to improve farm productivity including woodland management equipment, creating on-farm reservoirs and using water more efficiently.

The first grant funding calls are for reservoirs and forestry equipment, while broadband, rural business support, on-farm food processing, arable and horticultural productivity and resource efficiency open in late 2017. A further £6.6m will be available for animal health and welfare projects.

## Non Rural Specific EU Funding

The report on EU Funding for New Anglia LEP in February 2017<sup>48</sup> also looked at non rural specific funding over the period from 2007. Whilst the report does not split out rural specific projects or separate the funding received in Norfolk and Suffolk for most of these other funds, it shows the magnitude of project funding received. For the period 2007-2020 the EU funding received is:

- European Structural and Investment Funds £143.75m (including the European Social Fund (ESF) which invests in skills and workforce development and the European Regional Development Fund (ERDF) which invests in major capital and knowledge transfer programmes);
- R&D £91.8m (primarily through the framework programme (FP7 and now FP8) for collaborative R&D between EU research centres, companies and the wider community);
- TEN-T Transport programme £126m;
- European Investment Bank £1.54billion.

Thus the total is £1.9billion, which rises to £7.34billion with match funding for these projects secured from the UK public sector, businesses and third sector.

Notably in the previous FP7 programme (R&D) of the total €80.5million secured in New Anglia, over 80% was allocated to the UEA and NRP, with many projects focused on the agri-food and environmental sectors which are important to rural areas in Norfolk. In contrast most of the TEN-T transport investment was focused in Suffolk on links to Felixstowe. Clearly investment via these other EU programmes is much higher than the rural specific funding in EAFRD.

**A clear strategy to replace EU funding, both rural and generic funding, is therefore important for Norfolk and its rural areas after the UK leaves the EU. The need to make a clear case for how rural specific funding, managed locally, can help to facilitate local growth is a key and ongoing role for the Norfolk Rural Strategy Steering Group.**

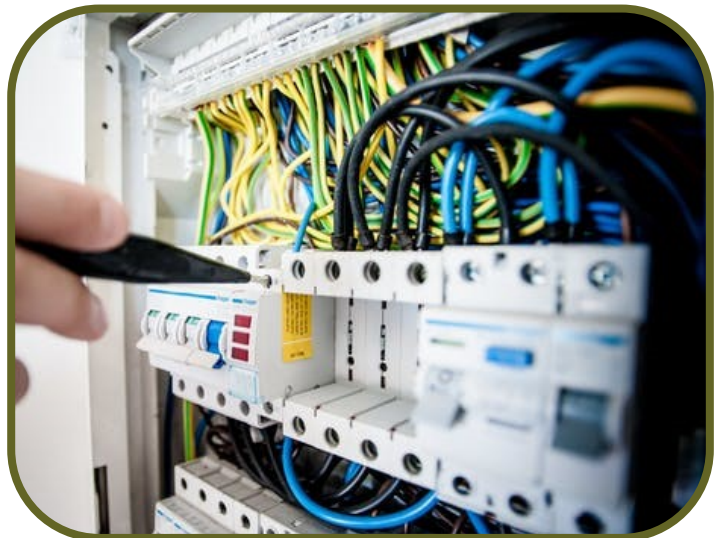
## Digital Divide

The Digital Divide campaign was set up by following the publication of the Norfolk Rural Development Strategy in 2013 as a broad partnership of rural groups and businesses led by Anglia Farmers. It has met regularly to promote the campaign and share knowledge, held two regional summits with local MP George Freeman and met with Department of Culture, Media and Sport (DCMS) Ministers to make the case for more investment in digital connectivity with MPs George Freeman and Chloe Smith.

As well as working on broadband connectivity using fixed, satellite and wifi connections, Digital Divide has also campaigned on mobile calls and data and held meetings with all the major network providers on their 4G and 5G roll out plans.

Better Broadband for Norfolk (BBfN) is the main programme which has been run to improve broadband delivery to premises in Norfolk and has received support from DCMS via Broadband Delivery UK (BDUK), BT, Norfolk County Council, New Anglia LEP and five district/borough councils: Breckland, Broadland, King's Lynn and West Norfolk, North Norfolk and South Norfolk. BBfN has since its formation in 2012:

- Doubled the percentage of Norfolk properties with access to 24Mbps+ broadband speeds to 88%, with a target to increase this to 95% by 2020;
- Spent £53m to date to upgrade facilities and this will rise to £68m with currently agreed delivery plans;
- Made 840 new installations with a further 900 planned by 2020.



Mobile phone signals are also currently undergoing a major upgrade programme under Project Beacon, a national programme to rationalise the phone mast network and promote upgrades to 4G and 5G signals.

Despite this progress, feedback from business groups still shows that many premises lack the connectivity to facilitate modern business processes. This covers administrative tasks with most government services becoming 'digital by default' as well as the growth in demand for broadband by visitors, with many tourism providers now saying that visitors will enquire about broadband coverage before making a booking.

A major new dimension to mobile coverage is the development of the Internet of Things (IoT) which will require sensor data to be collected over large geographic areas using mobile

technology. This will need network providers to plan their coverage based on the presence of IoT connections as well as where people live and work. This will change the end user maps in many rural areas where IoT is being used for sensors in farming, environmental management and services such as the water and power networks.

Despite rapid progress in broadband to the premises by BBfN, there is therefore still pressure to close the gap for the last 12% of premises and to make mobile accessibility better. Alternative and subsidised broadband solutions may be available to those Norfolk premises that are unable to receive broadband speeds in excess of 2Mbps and who will not be benefitting from the BBfN programme. In July 2017 DEFRA announced that £30 million of EAFRD funding will be made available to improve rural broadband services at speeds of 30Mbps or faster where this is not available or planned under the BDUK programme.

**Whilst significant progress has been made on broadband connectivity in rural Norfolk since 2013, there remains a continuing need to extend the network to more properties, particularly those in the ‘last 5%’ and to ensure that rural areas have access to 4G and 5G as they are rolled out nationally.**

## Silver Pound Conference

The Silver Pound Conference held on the 13<sup>th</sup> May 2016 followed discussions in the Steering Group on the increase in spending power being seen in the older population in Norfolk, much of which is concentrated in rural areas. The focus of the conference was on explaining how

increased spending power could be translated into a business opportunity, both locally and through Norfolk based companies developing products for a market which is growing internationally.

With 100 delegates from private, public, care and academic sectors the conference featured keynote speakers including Mid Norfolk MP George Freeman, Minister for Life Sciences and Ian Sheriff, Chair of the Prime Minister’s Dementia Task Force. Wendy Thomson, Norfolk County Council Chief Executive opened the event on behalf of NCC. The Conference was widely promoted in local media.

The issues debated at the conference were then discussed at a lunch held with Norfolk MPs to promote rural issues.

The Steering Group also held a meeting with UEA’s Assistive Technologies Unit to look at the market opportunity for technologies to support care needs.

The market potential of the Silver £ is confirmed by



analysis<sup>49</sup> using ONS data on spending per capita and the demographic trends for rural Norfolk from the original strategy in 2013, which shows that from 2012-2037 the over 50 age group in Norfolk will increase their spending power from £4.2billion to £8.6billion in cash terms. The increase is particularly pronounced for the over 75 age group given the big increase in the population from 92,000 to 170,000 projected in this age group.

**Meeting the future needs of the older population will remain a challenge for rural Norfolk, but also represents a significant market opportunity for businesses which recognise the increase in the spending power of this age group.**

## Community Land Trusts (CLTs)

CLTs<sup>50</sup> are a form of community-led housing, set up and run by communities to develop and manage homes, with some also managing other assets important to that community, like community enterprises, food growing or workspaces.

There are now over 225 CLTs in England and Wales, and the sector has grown six-fold since 2011. Community Land Trusts have developed over 700 permanently affordable homes and will develop a further 3,000 homes by 2020. Rents are based on what local residents earn to ensure that the housing remains affordable.

To help develop this new approach in Norfolk the Steering Group organised a conference with North Norfolk District Council and Community Action Norfolk on 4th November 2016. This event was attended by 60 landowners, community groups, local authority councillors and officers to hear about the potential for CLTs to enable rural communities to realise small-scale affordable housing projects in their areas.

The event also brought in expertise from Cambridgeshire and Lincolnshire to support the development of a number of initiatives in North Norfolk, as well as making connections between key local stakeholders. Subsequent government funding for affordable housing in areas with high second home concentrations is likely to enable a number of these projects to come to fruition. Given that parts of North Norfolk have very high second home concentrations this approach is one way to help address housing affordability in these areas for local workers.

**The Norfolk Rural Strategy Group, having stimulated the CLT event, has successfully led to action being developed by stakeholders who will now work with their rural communities to take the development of CLTs in Norfolk forward.**



## Annex 2 - Rural Strategy Steering Group

The Rural Strategy Steering Group has a key role to play, as has been seen during 2013-'17, in influencing and stimulating others to take action and it is proposed that this should remain one of its primary functions.

To do this it is important that it is broadly based and flexible. To ensure effectiveness and commitment the recommended structure is:

- Private sector chair;
- One member for each proposed major action area (World Class Environment; Technology Driven; AgriFood Competitiveness; Enablers of Growth);
- One elected member (or officer) from Norfolk County Council or a District Council;
- Two additional members to represent the wider rural community.

In addition to this core of eight members a wider liaison group will be established including those with specific interests who will help with projects or events which align with their focus, thorough a series of task and finish groups. The members of the liaison group will have an open invitation to join meetings of the Steering Group and be circulated with all its papers, but will not be expected to attend most meetings.

### Leadership and delivery

The Steering Group will deliver its role on setting a vision and lobbying for rural needs primarily through:

- Themed meetings and events which bring together stakeholders to debate and agree how programmes and policies can support rural communities;
- Writing reports on specific interventions and topics which can be used to influence action taken by stakeholders;
- Supporting events run by others which provide an opportunity to promote the needs of rural Norfolk.

The national Rural Coalition<sup>51</sup> in its Statement 2017 has identified 4 principles to underpin rural policy making for the future, which can help to guide the Steering Group's lobbying work. These were:

- Brexit discussions must recognise 'rural' is more than agriculture and the natural environment;
- All Brexit negotiations and post-Brexit policies must be rural proofed;
- Policies and funding must deliver a fair deal for rural communities;
- Decision-making, funding and delivery must be devolved and involve rural communities.

## References

### Background

<sup>1</sup> Norfolk County Council (2013), Norfolk Rural Development Strategy 2013-2020 <https://www.norfolk.gov.uk/ruralstrategy>

### Defining Rural Norfolk

- <sup>2</sup> DEFRA (2017), Official Statistics: Defining rural areas using the rural urban classification
- <sup>3</sup> Norfolk County Council (2013), Norfolk Rural Development Strategy 2013-2020
- <sup>4</sup> Cool Tourism (2014), The Economic Impact of the Norfolk Visitor Economy 2013
- <sup>5</sup> ONS (April 2015) % of total employment provided by 78200: Temporary employment agency activities
- <sup>6</sup> Localis (2017), The Making of an Industrial Strategy: Taking Back Control Locally
- <sup>7</sup> ONS (2016), Annual Survey of Hours and Earnings
- <sup>8</sup> Corlett Adam (January 2016), Paved with Gold: Low Pay & the National Living Wage in Britain's cities, Resolution Foundation Briefing
- <sup>9</sup> NOMIS, Earnings by place of work (2016)
- <sup>10</sup> 15th April 2017 Guardian: Robots to replace 1 in 3 UK jobs over next 20 years, warns IPPR
- <sup>11</sup> NOMIS, Official Labour Market Statistics 2016
- <sup>12</sup> HEFCE, student mobility 2008-'09 – 2013-'14
- <sup>13</sup> UKCES, Working futures
- <sup>14</sup> New Anglia (2017), AgriFood Tech Sector Skills Plan
- <sup>15</sup> NOMIS, Official Labour Market Statistics 2016
- <sup>16</sup> HMG, (2016) Social Mobility Index
- <sup>17</sup> Defined as: the ability for people to progress in socio-economic terms on their own merits

### The Norfolk Rural Economy in 2017

- <sup>18</sup> CLA (2016), Rural Business 2030: Unlocking Investment, Unlocking Potential
- <sup>19</sup> HMG (2017), Building our Industrial Strategy: green paper
- <sup>20</sup> BEIS (2017), East of England Science and Innovation Audit

- <sup>21</sup> DEFRA (2016), Local Authority breakdown for key crops areas and livestock numbers on agricultural holdings
- <sup>22</sup> HMG (2016), BPS 2016
- <sup>23</sup> Forestry Commission grants in Norfolk averaged £315,00 per annum from 2006/07-2013/14 with nearly half focused on woodland improvement, a quarter on woodland creation and the remainder on woodland management, regeneration and planning
- <sup>24</sup> DEFRA (2017), CAP payments search
- <sup>25</sup> East of England European Partnership (2017), EU Investment in New Anglia: An analysis of EU funding from 2007-202
- <sup>26</sup> DEFRA (2017), Agriculture in the UK 2016
- <sup>27</sup> Analysis of EOEFM Regional Trade Statistics, HMRC July 2017
- <sup>28</sup> New Anglia (2017), AgriFood Tech Sector Skills Plan
- <sup>29</sup> Cool Tourism (2014), The Economic Impact of the Norfolk Visitor Economy 2013
- <sup>30</sup> US Department of Agriculture (USDA) Economic Research Service (2013), Global Food Industry
- <sup>31</sup> HMG (2014), A Plan for Public Procurement
- <sup>32</sup> FDF (2017), Breaking the Chain: key workforce considerations for the UK food and drink supply chain as we leave the EU
- <sup>33</sup> EFRA Select Committee (2017), Feeding the Nation: Labour Constraints, Seventh Report of Session 2016–17
- <sup>34</sup> Resolution Foundation (12<sup>th</sup> June 2017), New survey shows businesses and totally unprepared for a new era of lower migration
- <sup>35</sup> Nursing and Midwifery Council (2017), NMC releases new data on EU nurses and midwives
- <sup>36</sup> Corlett Adam (January 2016), Paved with Gold: Low Pay & the National Living Wage in Britain's cities, Resolution Foundation Briefing
- <sup>37</sup> NOMIS Official Labour Market Statistics
- <sup>38</sup> Collison, Martin (2016), Collison & Associates Limited, member of Norfolk Rural Development Strategy Steering Group
- <sup>39</sup> IPPR (May 2017), The policy challenges of automation
- <sup>40</sup> Local Investment in Future Talent (LIFT), [www.liftprogramme.co.uk](http://www.liftprogramme.co.uk)

## **Proposed Actions for 2017-2020**

<sup>41</sup> Living Wage Foundation (2017)

## **Annex 1—Delivery of the Norfolk Rural Strategy 2013-2017**

<sup>42</sup> Norfolk LEADER Groups <http://www.norfolklags.co.uk/>

<sup>43</sup> Norfolk LEADER team data (2017)

<sup>44</sup> Pipeline projects mean those which are currently in the development or application process

<sup>45</sup> In addition part of the LEADER funding is used (18%) to support programme delivery and support for applicants to develop their projects

<sup>46</sup> East of England Partnership (2017), EU Investment in New Anglia: An Analysis of EU Funding from 2007-2020

<sup>47</sup> DEFRA (2017), 29<sup>th</sup> July 2017 Press Release: £200m boost for rural England

<sup>48</sup> East of England Partnership (2017), EU Investment in New Anglia: An Analysis of EU Funding from 2007-2020

<sup>49</sup> Collison (2015), Norfolk Rural Strategy Event 23<sup>rd</sup> January 2015, based on ONS data on spend per capita and population projections for Norfolk (Norfolk Rural Development Strategy dataset 2013-2020) inflated by 2% per annum in cash terms

<sup>50</sup> Community Land Trust Network, <http://www.communitylandtrusts.org.uk/>

## **Annex 2—Rural Strategy Steering Group**

<sup>51</sup> Members are: ACRE, CPRE, CLA, Arthur Rank Centre, National Association Local Councils, NFU, National Housing Federation, Plunkett Foundation, RICS, RTPI, Rural Services Network, Town and Country Planning Association



**Strong Roots**

**New Growth**

**Norfolk Rural Strategy**

2017-2020