



NORFOLK COUNTY COUNCIL

NORFOLK INVESTMENT FRAMEWORK

EVIDENCE BASE – May 2022

HATCH

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1.1

Introduction



Evidence Base Purpose

Introducing Norfolk's evidence base:

Hatch was commissioned to produce a five-year Investment Framework to help secure long-term growth and prosperity for Norfolk. The Investment Framework will prioritise activities, sectors and places for future grant funding rounds.

Norfolk County Council will use the Investment Framework to assess funding applications from partners and make investment decisions that deliver the greatest possible benefit to the region. The Framework is being produced proactively and ahead of anticipated announcements on future funding rounds, including the Shared Prosperity Fund.

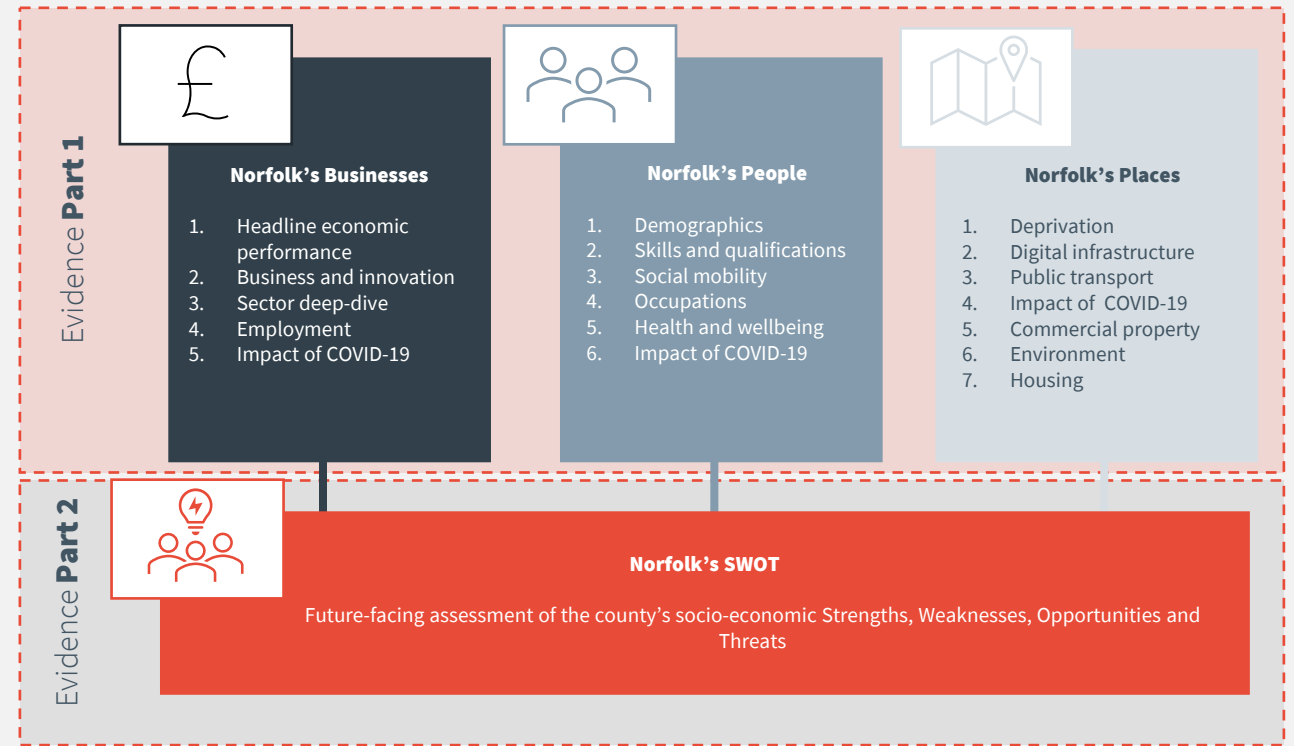
This document sets out a comprehensive assessment of the Norfolk economy and its constituent parts:

- + **Business:** *understanding Norfolk's business landscape, employment characteristics and specialisms;*
- + **People:** *understanding Norfolk's resident and worker population and socio-economic challenges; and,*
- + **Place:** *understanding the spatial, social, and environmental factors affecting the prosperity and vitality of Norfolk's places.*

An assessment of Strengths, Weaknesses, Opportunities and Threats (SWOT) has also been produced to capture key messages and provide a forward-facing assessment. Both of these elements – the economic baseline and SWOT – will shape the form and priorities set out in the Investment Framework and corresponding paper.

All data collected as part of this document has been shared with Norfolk County Council. This will allow evidence to be replicated and updated in perpetuity – enabling monitoring of change over time and progress of key performance metrics.

Evidence base structure



Contextualising Norfolk's performance:

To contextualise the performance of Norfolk, county-level data has been benchmarked against several comparator areas. These include:

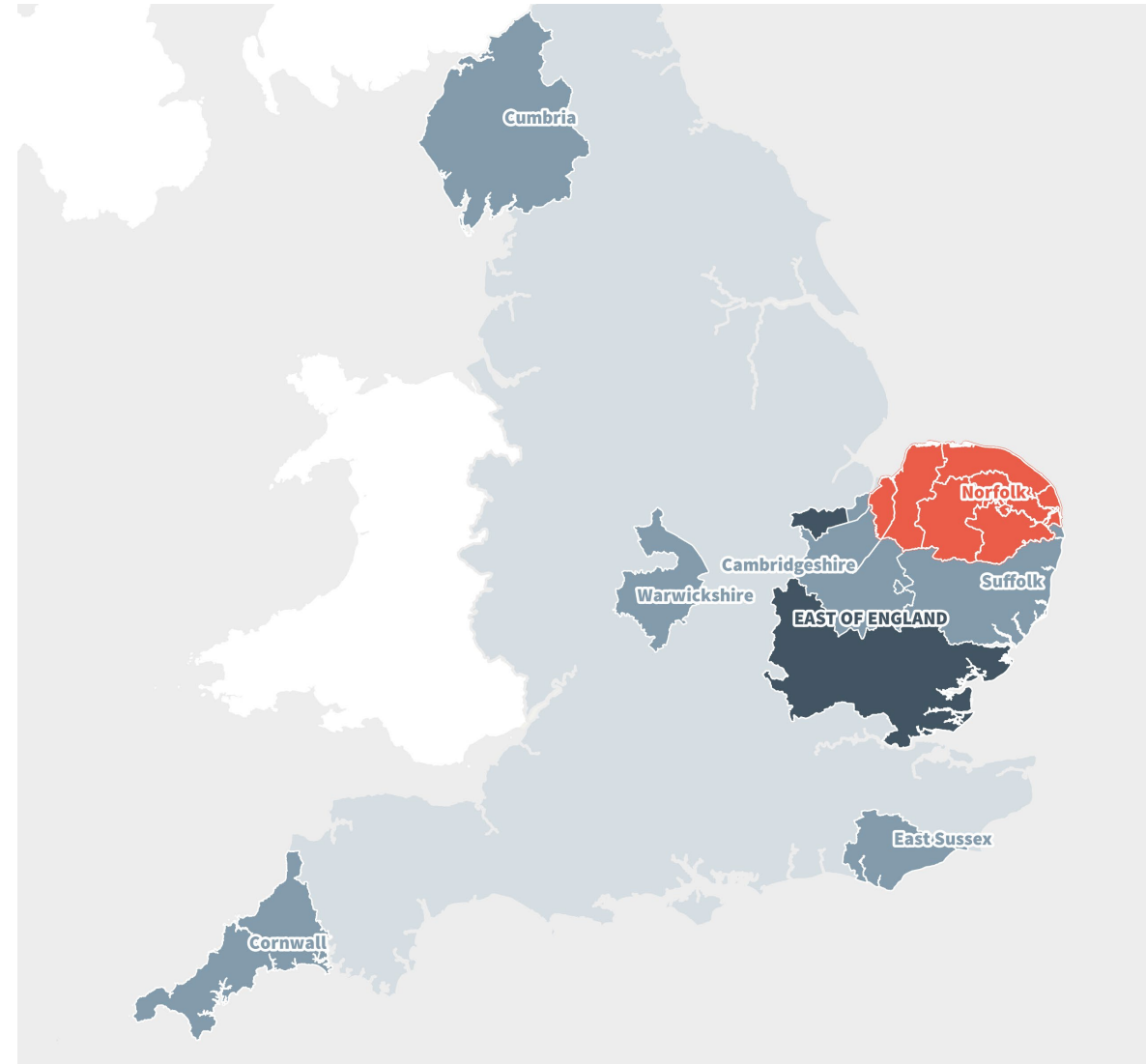
- + **Geographical neighbours** - Suffolk and Cambridgeshire;
- + **Places that have stronger economic performance** that the county can aspire to match – Suffolk, East Sussex and Warwickshire; and,
- + **Places that are typically considered as 'in need' of levelling up** but have similar challenges to Norfolk - Cumbria and Cornwall.

Data has also been contextualised against the East of England and England averages.

Where possible analysis has been undertaken at the district level. The seven districts across the county are:

- + King's Lynn and West Norfolk
- + Breckland
- + North Norfolk
- + Broadland
- + Norwich
- + South Norfolk
- + Great Yarmouth.

Norfolk's comparator geographies



Business: Evidence Summary

An important economy



Home to **39,500** businesses and **389,000** employees that contribute almost **£19bn** in Gross Value Added to the national economy each year

An economy with important clusters



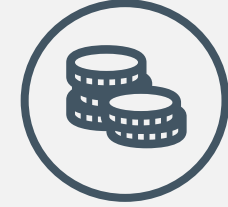
For example, Clean Energy in Great Yarmouth, Life Sciences at the Norwich Research Park, Creative and Digital in Norwich and one of the largest general insurance clusters outside of London

A slower growth economy



Business and employment figures are increasing (**+13%** and **+9%** since 2010 respectively) but more slowly than at the national level (29% and 14%)

A lower-wage economy



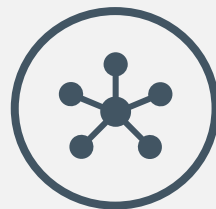
The biggest employment and business sectors are health, retail, education, manufacturing, construction, and hospitality

A lower-value economy



While Norfolk contributes £19bn in Gross Value Added, its contribution *per head* is well below the national average (**£21k** vs £29k)

An economy with regional variations



Norwich and Broadland make a significant contribution to the economy (£4bn and £3bn per year), which is much higher than North Norfolk and Great Yarmouth (£1.6bn and £1.8bn)

An economy with opportunities



There are growing specialisms in higher-value parts of the economy, including Clean Energy, Knowledge Economy, Life Sciences, Digital/Creative and Agri-Food

An economy with relatively low innovation



Business start-up rates (**10%**) are below the national average (13%) as is uptake of innovation funds and the proportion of high-growth businesses is lower than in comparator areas (e.g. Cambridge and Cornwall)

People: Evidence Summary

A growing population



Population has increased by **+21%** since 1991 (vs 18% nationally) and is expected to grow by another **+14%** by 2043

An ageing population



25% of people are aged 65+ (vs 19% nationally) with future population growth expected to be highest among this age group

A low-skilled population



Only **35%** of the population has an NVQ4+ qualification (vs 43% nationally) and **7%** have no qualifications at all

An economically active population



81% of people (aged 16-64) are employed or looking for work (vs 79% nationally) but the unemployment rate (6%) is above the national average.

A lower wage population



Median resident earnings are **£28,571** and median workplace earnings are **£28,421** (vs £32,944 and £31,044 across the East of England)

A population with deprivation challenges



14% of Lower Super Output Areas are within the 20% most deprived in the country but 24% of LSOAs are within the 20% most deprived in the country **for education**.

A majority UK-born population



93% of residents were born in the UK vs 86% at the national level, with other people being born in Europe (5%), the Middle East and Asia (2%), Africa (1%) and the Americas (1%)

A relatively healthy population



Life expectancy is above the national average but lower than regional comparators. People generally report positively on their 'Life Satisfaction' and 'Happiness'

Place: Evidence Summary



House prices are relatively low
Median house prices are **£240k** which is below the national average (c£250k)



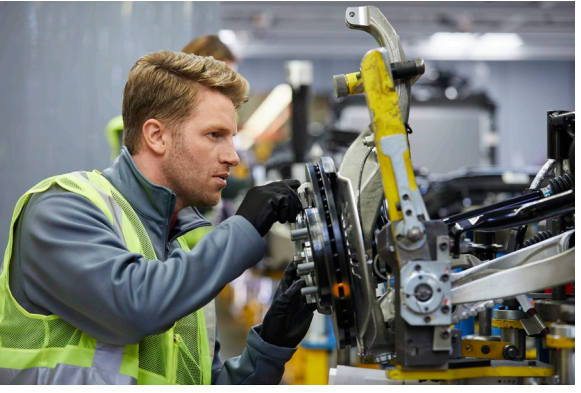
Public transport is weak
E.g. Swaffham is accessible to 259k people by car within 45 minutes but only **8k** by public transport



Crime rates are low
There are **72** crimes per 1,000 people annually vs 82 at the national level, and 104 and 90 in places like Cambridgeshire and East Sussex



Commercial Property availability is limited
Light industrial, industrial and office vacancy rates are low (**<2%**, **<6%** and **<2%**)



Commercial property is poor quality
Only **2%** of industrial, **7%** of light industrial and **6%** of office space is Grade A and B vs 11%, 3% and 29% nationally



Most places are digitally connected
Only **1%** of premises are below the Universal Service Obligation and 93% have access to superfast broadband



Ultrafast connectivity is limited
Only 30% of premises have access to ultrafast broadband vs 60% at the national level



Water and electricity supply is a constraint
The Environment Agency and UK Power Networks confirm supply constraints – which will limit housing, commercial and business investment in the county

Norfolk's Barriers to Growth



SKILLS MIX

Oxford Economics forecasts show a mismatch between current and future skill needs and the local labour force is impacting inward investment and business expansion decisions



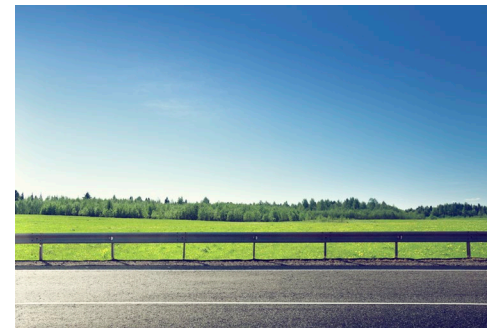
SKILL LEVELS

Low skill levels are restricting the ability of local people to access higher value roles in local growth sectors



SCHOOL ATTAINMENT

GCSE pass rates at 16 are similar to national averages, but fewer children attain the highest grades and beyond 16 more young people choose work without qualification than is the case nationally.



ROAD RESILIENCE

Poor resilience on the strategic road network impacts productivity and investor decision making



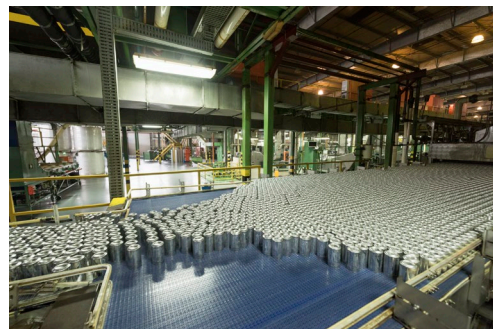
PUBLIC TRANSPORT

Poor public transport connectivity in rural areas makes it difficult for some to access employment/education opportunities



DIGITAL CONNECTIVITY

Patchy digital and mobile connectivity in rural and coastal areas reduces the attractiveness of these areas for business and means some people miss out on employment and education opportunities



COMMERCIAL PROPERTY SUPPLY

The constrained and low-quality commercial property market limits business expansion and inward investment into the county



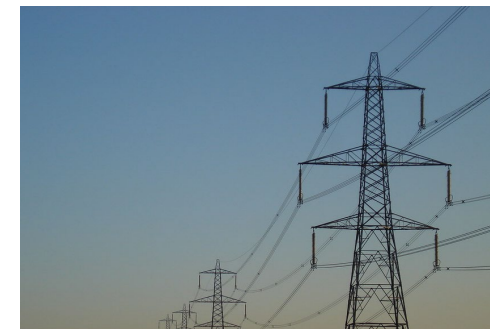
HOUSING SUPPLY

Despite lower-than-average house prices, a relatively low wage economy makes it difficult for young people to live and work in the county. A constrained housing supply in well-connected areas limits options for working age incomers



PLACE OFFER

Norfolk currently offers a more attractive way of life to families and older people, with higher skilled young graduates more typically choosing to relocate to other parts of the country



UTILITY SUPPLY

Constrained utility networks in strategic locations are restricting and slowing the level of development that can come forward

These impact... PRODUCTIVITY, INWARD INVESTMENT, WAGES, ECONOMIC GROWTH, DEPRIVATION, SOCIAL MOBILITY, HEALTH etc.

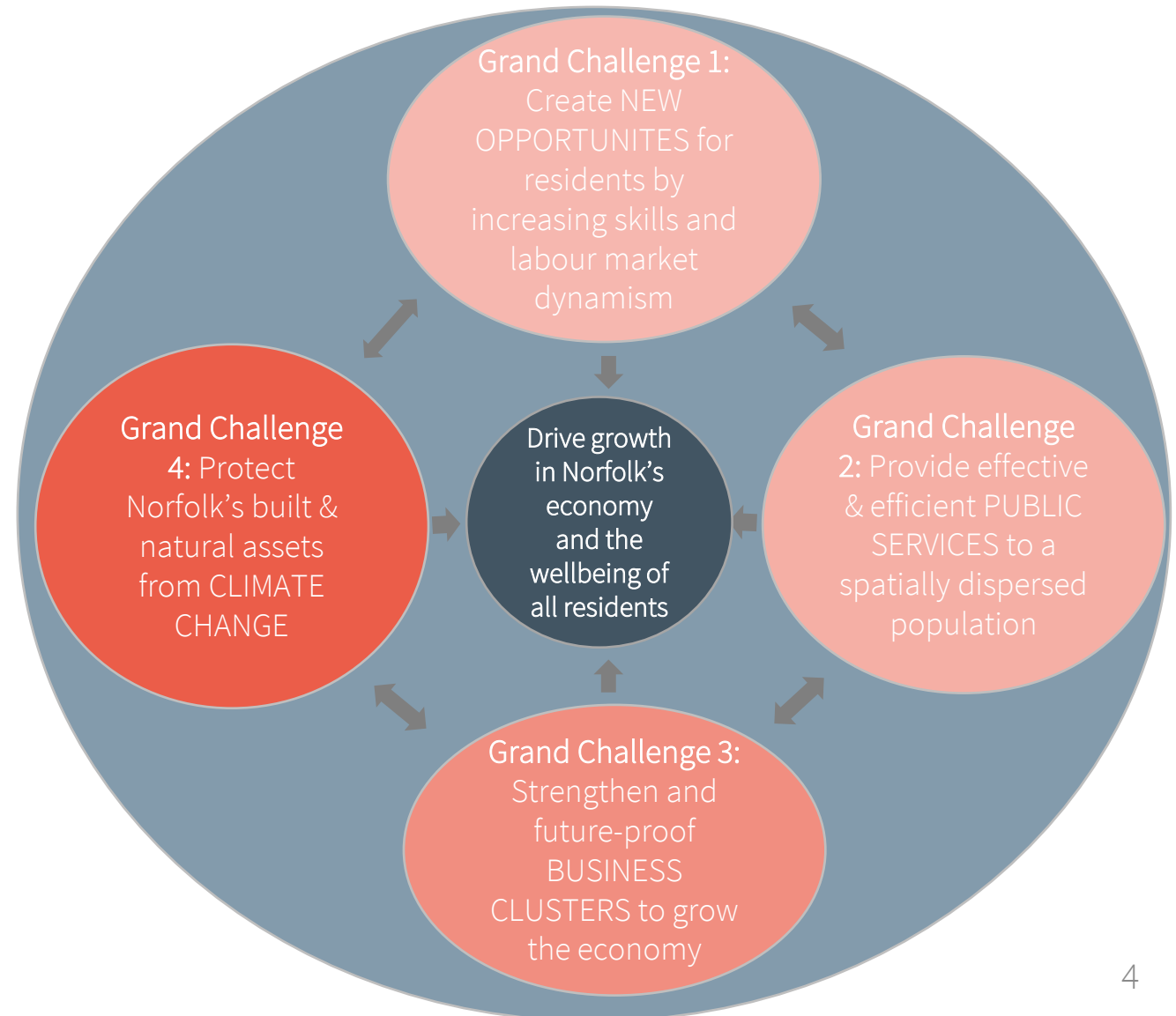
Setting Norfolk's Grand Challenges

Norfolk's Barriers to Economic Growth are complex and interlinked, including:

- skills
- infrastructure
- demographics
- deprivation
- connectivity
- innovation

Four Grand Challenges have been developed to address the most significant of these barriers with the wider aim of:

Driving growth in Norfolk's economy and the wellbeing of all residents.



1.2

Norfolk's Policies





Together, For Norfolk (2019 -25)

Together for Norfolk is Norfolk County Council's six-year Business Plan (2019 to 2025), which highlights the Council's ambitions for the County and how these will be delivered.

Main Challenges Identified: Norfolk's employment rate is higher than national average but a large proportion of people are in lower paid or seasonal roles; over half the rural population survive on low wages; automation is a significant threat to the local workforce; by 2040 40% of people are predicted to be 'dependent' rather than of working age; there is a lack of affordable housing for young families; Norfolk needs 80,000 new homes to meet demand; climate change presents significant risks to coastal communities; 120,000 people live in areas classed as deprived.

Main Opportunities Identified: The population is forecast to grow from 900,000 to over 1m by 2036; Norfolk has one of the largest county economies in the country; there are growing specialisms in clean energy, biotechnology and creative digital.

Main Ambitions: Four key priorities are outlined: (1) Inclusive growth and social mobility; (2) Encouraging housing, infrastructure, jobs and business growth; (3) Developing the workforce to meet the needs of the sectors powering the local economy; and (4) Reducing impacts on the environment. This is to be achieved via three themes (1) Growing economy; (2) Thriving People; and 3) Strong Communities.

Example Activities Supported:

- Growing Economy: Invest £2m of DEFRA funding to increase digital connectivity in rural businesses; achieve 99% 4G coverage across Norfolk by 2025; release public land for new housing; create more new apprenticeships by working with local businesses
- Thriving People: Invest £120m in new special schools; continue to commission the O-19 Healthy Child Programme; invest £29m in the Living Well: Homes for Norfolk programme to support extra care housing development
- Strong Communities: Grow volunteer network to reduce loneliness; continue to develop Norfolk as a high-quality cultural visitor destination; deliver 'Norwich Castle: Gateway to Medieval England' project

Better Together For Norfolk (2021)

The Together for Norfolk Plan (2019) has been refreshed in 2021 to create the Better Together for Norfolk Strategy which focuses on the impacts of COVID-19 on life and work within Norfolk. It highlights the Council's strategic priorities for the County.

Main Challenges Identified: A survey of Norfolk residents used to understand the impact of Covid-19 and to identify key areas to focus recovery identified the main worries of Norfolk residents were for small local businesses, unemployment, social care and health, and investment in community infrastructure and hubs.

Main Ambitions: The document sets out five strategic priorities: (1) A vibrant and sustainable economy; (2) Better opportunities for children and young people; (3) Healthy, fulfilling and independent lives; (4) Strong, engaged and inclusive communities; (5) A greener, more resilient future. This is to be achieved via three themes (1) Growing Economy; (2) Thriving People and (3) Strong Communities.

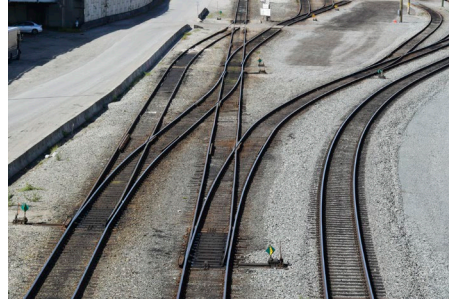
Example Activities Supported:

- A Vibrant and Sustainable Economy: Develop Norfolk as a centre for innovation in life sciences and supporting new technologies with a strong inward investment proposition that promotes our county as a place to visit.
- Better Opportunities for Children and Young People: Implement a programme of work to support learning recovery in all age groups, to address disruption to learning caused by Covid-19.
- Healthy, Fulfilling and Independent Lives: Accelerate the integration of health and social care services in Norfolk, taking a leading role on prevention.
- Strong, Engaged and Inclusive Communities: Support local community or voluntary sector initiatives through discretionary funding programs, such as the Social Infrastructure Fund, and offer support for grassroots organizations to grow and develop.
- A Greener, more Resilient Future: Implement Norfolk's Environmental Policy to protect the county's biodiversity, conserve areas of natural beauty, promote the efficient use of natural resources, and achieve 'Net Zero' carbon emissions across the County's estates by 2030.



Norfolk's Strategic Infrastructure Delivery Plan (2020)

The Norfolk Strategic Infrastructure Delivery Plan sets out high level strategic infrastructure priorities for the next ten years. It includes projects being delivered by both local authorities and external partners.



Example Priorities Identified:

- **Long Stratton Bypass:** Bypass for Long Stratton which will include delivery of 1,800 new dwellings
- **Broadland Growth Triangle Link Road:** New link between Broadland Business Park and Norwich Airport through development sites and into Norwich's suburbs
- **Norwich Western Link:** Link between Broadland Northway at Taverham to the A47 to the west of Norwich
- **Broadland Rail Station:** Proposed new railway station at Broadland Business Park on the line between Norwich and Sheringham
- **Thetford Energy Supply:** Delivery of substation and new energy infrastructure to unlock Thetford Urban Extension and development of Thetford Enterprise Park
- **Snetterton Heath Energy Supply phase 2:** Delivery of new power infrastructure to unlock employment opportunities at Snetterton Business Park
- **Weavers Way Walking and Cycling Route:** New walking and cycling route between Cromer and Great Yarmouth
- **Broadland Growth Area School:** New secondary school within the Broadland Growth Triangle
- **East Norwich Regeneration Area:** New infrastructure to enable once in a lifetime regeneration opportunity (bridges, roads, cycle infrastructure, marina etc)
- **Thetford Junctions:** Upgrades to Thetford's junctions on A11 to increase capacity
- **Norwich in 90:** Improvements to rail network to improve frequency and journey times between London and Norwich
- **Great Yarmouth Flood Defences:** Upgrades to existing defences to maintain protection
- **A47 Dualling:** Plans in-train but project not currently under construction
- **Great Yarmouth Third Crossing:** Third river crossing in Great Yarmouth
- **National Grid ESO:** Proposals for a co-ordinated approach to connect offshore energy production to the national grid which will enable more energy to be produced and fed into the grid

Norfolk's Apprenticeship Strategy (2020)

The Norfolk Apprenticeship Strategy 2020-2023 sets out a strategic vision and operational action plan for apprenticeships in Norfolk across all areas of Norfolk County Council.



Main Challenges Identified: A significant 4-year decline in apprenticeship starts in Norfolk, from a high of 7,670 in 2015/16 to 5,740 in 2018/19. Although the rate of decline had begun to reduce in 2018/19 and 2019/20, this has been severely impacted by Covid19. National data suggests new apprenticeship starts have decline dramatically due to the impact of Covid19, but there has been a gradual increase in starts at all ages and levels after the first UK lockdown.

Main Opportunities Identified: The Strategy highlight three strategic strands identified by the Local Government Association review: 1) Children's services: supporting a broad range of pathways into Apprenticeships for pre-16 and students aged 16-18; 2) Growth and development: driving forward the provision of apprenticeships to support Norfolk's businesses to prosper and Norfolk's residents to aspire and grow throughout their working lives'; 3) Human resources leadership and coordination of the internal Apprenticeship Programme

Main Ambitions: The Strategy sets out a vision that apprenticeships will be an attractive offer that Norfolk's young people and adults aspire to go into as a high quality and prestigious path to a successful career, and that employers (including NCC) value to develop their workforce.

Example Actions:

- Identify and promote apprenticeships and traineeship opportunities in sectors of the Norfolk labour market that are actively recruiting
- Increase the volume of Apprenticeship delivery at Advanced and Higher level to meet the skills needs of Norfolk businesses
- NCC aims to be a widely recognized employer offering a wide range of attractive apprenticeship opportunities, with 90% of apprenticeship starters completing their qualifications



Economic Strategy for the East of England (2020)

The Economic Strategy for the East of England was produced by Cambridge Econometrics in 2020 on behalf of IFM Investors. It has been endorsed by LEAs across the region.

Main Challenges Identified: Growth prospects are limited by an inability to move daily commuters to and from employment hubs; there is patchy infrastructure provision in rural areas which means many places are not integrated with important economic markets; there are disadvantaged coastal communities that are unable to access opportunities in the local transport, logistics and clean energy sectors; Permitted Development Rights is impacting employment assets and sites; levels of graduate retention are low and there are few clear attractors for them; there is a severe shortage of housing for locals and workers.

Main Opportunities Identified: The region's expertise and assets leave it well-placed to tackle the Government's Ageing Society and Clean Energy Grand Challenges; New Anglia LEP are focusing on building excellence in STEM disciplines across their skills and education system; R&D spending in New Anglia is 1.14x the national average; there are c.1,000 wind turbines off the coast of the East of England generating 3.5GW of energy - investment has been secured for another 1,000 turbines; 60% of offshore wind energy is generated in the East of England; there is 1.4m hectares of farmland in the East of England and 79% is arable;

Main Ambitions Set Out: The strategy's vision is for the region to be a network of dynamic knowledge corridors that link key economic clusters and institutions with one another while also connecting coastal assets in the East (with specialisms in logistics, clean energy and tourism) and the London commuter belt to the south. These are to be interspersed with rural oases that themselves provide employment opportunities in the tourism and agri-food sectors.

Example Activities Supported: Provision of new housing and employment space; improvement and expansion of transport networks; creative placemaking to retain graduates; support diffusion of employment clusters from urban centres; improve in-work education provision; programmes to support technology adoption; future 'powerhouse' style co-ordinating agency.

Norfolk and Suffolk Economic Strategy (2022)

The Norfolk and Suffolk Economic Strategy is a response to the Government's Plan for Growth and provides the foundations to secure government funding. This strategy looks to 2036 but focuses on actions needed over the next three to five years to secure long term success.

Main Challenges Identified: Employment levels are higher than the UK average, yet there are not enough people to fill current vacancies and some sectors face significant skills shortages – particularly with regards to science, technology, engineering and maths (STEM) related skills and capabilities. It is essential must to support and inspire businesses to commit to developing skills in their workforce and find ways to spark innovation.

Main Opportunities Identified: Norfolk and Suffolk has a £38bn economy and makes a major contribution to UK plc. It is an outstanding place to live, learn and do business. 140 miles of coastline, three Areas of Outstanding Natural Beauty – and a diversity of landscapes, internationally important wildlife reserves and historic sites. The main urban centres of Ipswich and Norwich are dynamic with a rich cultural heritage while the market towns are a significant anchor point for businesses and individuals, growing in relevance as a result of the pandemic.

Main Ambitions:

- People – Inspire and enable all people to access employment, upskill and reskill.
- Business – Connect and empower businesses through innovation, supply chain development and access to new markets, accelerating the economy's transition to net zero.
- Place- Transforming the Norfolk and Suffolk economy into one of the best places in the world to live, learn, work and succeed in business.

Example Activities Supported:

- **People** - Delivering targeted campaigns to attract the talent from inside and outside of the region into key sectors and teaching. Develop high quality, innovative business leaders across all our sectors from start-ups to established companies including leadership training, and innovation cluster programmes.
- **Business** - Develop 'investor-led' programmes that support businesses to understand and prepare to raise equity and other forms of finance. Strengthen and stimulate supply chain opportunities through Inward Investment and enterprise zone development.
- **Place** - Identifying and addressing under-supply of suitable commercial space to accommodate business growth. Developing and promoting high-potential opportunities to foreign investors. Maximising the potential of key transport corridors for the provision of high-quality premises allied to clean growth.





Norfolk and Suffolk Local Industrial Strategy (2020)

The Norfolk and Suffolk Local Industrial Strategy (LIS) is the next stage in the evolution and implementation of the regional Economic Strategy. It builds on the Economic Strategy but is a deeper and more focused piece of work.

Main Challenges Identified: The County has several innovation assets, but innovation is concentrated in a small number of firms; there is a lack of workers with the right technical and digital skills to meet current and future employer needs; current levels of exports are lower than in comparator regions.

Main Opportunities Identified: Norfolk and Suffolk is uniquely placed to build on centuries of innovation to pioneer the technologies and science needed to power, feed and connect a growing national and global population for a cleaner and more sustainable future. There are few places that are so uniquely equipped to make telling contributions to the major challenges facing the world in the 21st century – food and energy security, healthy ageing and living with environmental change in a world where technology is advancing rapidly.

Main Ambitions Set Out: “A globally recognised, technology-driven, creative and inclusive economy which is leading the transition to a post-carbon economy through sustainable food production and sustainable energy generation”.

Example Activities Supported:

- Clean Energy – E.g., Expand the capacity and capabilities of regional ports to better serve the offshore energy market; expand OrbisEnergy’s focus from renewables to clean energy and provide a full wrap around support service for new businesses
- Agri-Food – E.g., Invest in a Food Innovation Hub in the Honingham Food Enterprise Zone; Collaborate with partners to unleash the potential of Agri-Tech East
- ICT and Digital Creative – E.g., Create a new digital hub in Norwich for the incubation of start ups and scales up in the digital and ICT space; Develop the economic case for SETI



Norfolk County Council Environmental Policy (2019)

The Norfolk County Council Environmental Policy aims to put an approach that ensures that the development of Norfolk’s economy is socially inclusive, while championing innovative and sustainable development at the centre of all efforts. It will support investment in green jobs and infrastructure, while ensuring that the environment is both protected and enhanced.

Main Challenges Identified:

The Norfolk County Council Environmental Policy is concerned with key environmental impacts that increasing climate change has on all aspects of the environment, whether the landscape itself, the species within it, or the rich cultural heritage that occupies it. This policy reflects the areas that the Council sees as key to protecting and maintaining the health of Norfolk’s distinctive environment and its occupants.

Main Opportunities Identified:

This policy will: provide clean air for the population, ensure a clean and plentiful water supply, encourage a thriving plant and wildlife community, reduce the risk of harm from environmental hazards such as flooding and drought, use resources from nature more sustainably and efficiently, enhance beauty, heritage and engagement with the natural environment, mitigate and adapt to climate change, minimise waste, manage exposure to chemicals and enhance biosecurity.

Example Activities Supported:

- Using and managing land sustainably – E.g., Embedding an ‘environmental net gain’ principle for development, including housing and infrastructure. Improving soil health. Working with key partners to ensure an adequate water supply, including exploring water harvesting initiatives.
- Recovering nature and enhancing the beauty of landscapes – E.g., Recognising that Norfolk is losing biodiversity, particularly insect populations. Therefore, a Pollinator Action Plan will be produced as a key element of our Environmental Strategy. Providing support for designated sites, including the Norfolk & Suffolk Broads, and the Norfolk Coast Area of Outstanding Natural Beauty, Natura 2000 sites and species, and County Wildlife Sites. Working to incentivise greater water efficiency, with users, and supporting water companies.
- Connecting people with the environment to improve health and wellbeing – E.g., Helping people improve their health and wellbeing by using green spaces. Encouraging children to be close to nature, in and out of school. Planting more trees to improve biodiversity and as a potential mitigation measure for climate change in appropriate locations.
- Increasing resource efficiency and reducing population and waste.
- Securing clean, healthy, productive and biologically diverse seas and oceans.
- Protecting and improving our global environment.



New Anglia LEP COVID-19 Recovery Restart Plan (2021)

The New Anglia COVID-19 Recovery and Restart Plan sets out the LEP's plan to support Norfolk and Suffolk's economy to recover from the impacts of COVID-19.

Main Challenges Identified: Norfolk's Gross Value Added is expected to contract by 35.9% due to the impacts of the pandemic; employment has been hit hard in the short term and will take several years to recover under a medium severity scenario; universal credit applications increased by over 33,000 in April 2020 taking the total claimant count to 95,000 people

Example Activities Supported:

- Redundancies – individuals made redundant and businesses looking for workers will be supported via new partnership arrangements
- Advice and support for businesses – businesses will be supported to access the advice and financial support they need to recover from the pandemic
- Mental health and wellbeing – a programme to support employers and employees with the mental health and wellbeing support they need will be created
- Visitor economy – a campaign to promote Norfolk and Suffolk as a good place to live and work will be launched
- Digitisation – a campaign to support businesses to improve their online presence and improve productivity will be launched, including better use of technology as well as support for remote working
- Supply chain – LEP offices will work with local companies to capitalise on opportunities to sell more goods and services locally
- High streets – LEP officers with local authorities to re-open high streets safely

Norfolk and Suffolk Cross-Cutting Skills Report (2018)

This report sets out the major skills challenges across Norfolk and Suffolk and the LEP's proposed solutions. It feeds into and aligns with the LEP's Economic Strategy and LIS.



Main Challenges Identified: Priority sectors are growing which is creating demand for higher level technical skills which are difficult to find; digital technology is becoming more pervasive and there is a need to upskill workers and businesses; the Industrial Revolution 4.0 will create new job roles with new technical requirements; there are severe skill shortages in important front line sectors; qualification levels are low and there is a need for 'work ready' staff; the existing workforce needs to be upskilled to meet the future needs of their employers; there is a shortage of teaching staff particularly in technical fields; the working age population is expected to remain the same over the next two decades; there is an outmigration of young talent.

Main Ambitions Set Out: Equip young people for success; drive skills progression for the workforce; provide agile and responsive training for key sectors; tackle barriers to work

Example Activities Supported:

- Local Sector Partnerships: Enable employers and stakeholders to connect and articulate their skill needs
- Future Proofing Industry: Support employers realise the benefits of Industry 4.0 and ensure the availability of the right skills for these roles
- Careers Inspiration: Support young people and adults understand the outstanding local careers opportunities available locally
- Technical Skills Pathways: Ensure employer-led pathways are available for young people and adults to develop valuable technical skills
- In-Career Development: Ensure high quality skills provision to enable the existing workforce to upskill
- Teaching/Trainer Pipeline: Ensure that there are enough qualified and technically savvy teachers available to meet the needs of future employment
- Building Local Capacity: Support local skills providers to develop the expertise they need



LEP Skills Advisory Panel's Local Skills Report (2021)

The report sets out the LEP's plan for supporting the growth of an inclusive economy with a highly skilled workforce to meet the needs of businesses.

Main Challenges Identified: It is difficult to provide education and employment opportunities to people in deprived rural and coastal areas due to poor transport links and less than optimal digital connectivity; the lowest performing areas for qualifications are Great Yarmouth, Sudbury, Kings Lynn, Watton and Thetford; new technology, data, sensors and automation (Industry 4.0) is going to create demand for new skills across many sectors particularly agri-food; there is high demand for people with the skills to work in health and social care and this is only going to increase to support the ageing population; the area tracks below the national average in HE Qualifiers by subject for relevant subject areas – most notably engineering, technology, computer science; in 2019 Norwich had the second lowest rating for social mobility in the entire country.

Main Opportunities Identified:

Major developments such as Sizewell C and Norfolk Vanguard Offshore Wind Farm will increase demand for construction related skills; apprenticeship take up in engineering and manufacturing are strong, as well as health, public services and care.

Drive skills progression for the workforce; provide agile and responsible training provision for key sectors; equip young people for success; tackle barriers to employment.

Example Activities Supported:

- Campaigns to raise awareness of training and mentorship opportunities for workforce
- Campaigns to highlight opportunities to get into Further Education teaching
- Events/engagements with school staff to help them understand the Enterprise Adviser Network.

Norfolk Rural Economic Strategy (2021-24)

This latest report refresh for 2021-2024 focuses on the impacts of the COVID-19 pandemic and how the Strategy can respond to the major changes to rural community life.



Main Challenges Identified: Over half the people living in the county and claiming universal credit live in rural areas; business start up rates in rural areas are well below the national average; the 2020 digital transition has been huge but rural Norfolk still needs to overcome constraints due to a lack of connectivity and skills; rural communities need better access to health and wellbeing services; Brexit is causing challenges for many rural businesses (particularly health and social care) in recruiting and retaining workers; the impact of climate change could have significant impact for agricultural businesses.

Main Ambitions Set Out: 'Our vision for Rural Norfolk is inclusive, sustainable communities with a dynamic, connected economy and healthy natural environment, able to meet the needs of all rural residents and visitors'.

Example Activities Supported:

- Provision of business diversification grants (e.g., a new LEADER or DRIVE programme)
- Diversification of publicly-owned assets (e.g., County Farms Portfolio) to support rural diversification
- Champion the role of the Environmental Land Management Scheme to support countryside access and active forms of countryside recreation
- Skills and education programmes to support rising demand for digital and clean growth skills
- Support businesses to work with schools to raise attainment
- Utilise the County's Innovation Mentoring Grant Programme to support innovation within businesses
- Push forward the Shared Rural Network Programme
- Introduce 5G and fibre connectivity to rural areas first

Norfolk's **Planned Investments**

Location	Planned Investments
King's Lynn and West Suffolk	A149 King's Lynn Bypass; West Winch Housing Access Road; A47 Wisbech Bypass Junction Upgrades; A47 Tilney to East Winch Dualling; Future Fens Flooding Infrastructure; New Creative Hub; Kings Lynn Multi-User Hub
Breckland	Snetterton Energy Supply; Thetford Water Supply; Thetford Sewerage Scheme; Thetford Sustainable Urban Extension; Attleborough Link Road; Thetford Energy Supply Upgrades; Attleborough Energy Supply Upgrades; Snetterton Heath Energy Supply Upgrades; A11 Thetford Bypass Junction Upgrades ; Thetford Community Shop (Employment Support)
South Norfolk	Easton, Hethersett and Cringleford Sewerage Upgrade; A140 Long Stratton Bypass; John Innes Centre HP3; Norwich Research Park Expansion; Smart Emerging Technology Institute (SETI)
Broadland	Broadland Growth Triangle Link Road; Broadland Business Park Rail Station; Broadland Growth Triangle Secondary School; Burlingham County Park Investments; A47 Acle Straight Dualling; Honingham Food Hub; Food Enterprise Park Solar Farm

Norfolk's **Planned Investments**

Location	Planned Investments
Norwich	East Norwich Regeneration; Norwich Western Link; Digital Creative Incubator Hub; Trowse Rail Bridge Upgrades; Earlham Substation Upgrades; Cringleford Substation Upgrades
North Norfolk	A148 Fakenham Roundabout Enhancements; Weavers Way Walking and Cycling Route; Bacton Hydrogen Hub (working in partnership with Hydrogen East, OGTC, ORE Catapult and North Norfolk District Council)
Great Yarmouth	Great Yarmouth Operations and Maintenance Campus; Great Yarmouth Sustainable Transport Package; Great Yarmouth Third River Crossing; Great Yarmouth Station Upgrades; Great Yarmouth Flood Defence Upgrades; Great Yarmouth North Quay Regeneration; Great Yarmouth Town Centre Improvements; Great Yarmouth North Quay Regeneration
County-Wide	A47 Dualling and Upgrades; Local Full Fibre Network; Shared Rural Network Scheme; Norfolk and Suffolk Innovation Network; Norwich in 90 Programme; Smart Emerging Technology Institute; Norfolk County Council Go Digital Programme; Invest East Investment Readiness Programme; Delivering Rural Investment for Vital Employment (DRIVE)

Norfolk's Planned Investments



Name: Great Yarmouth O&M Campus
Location: Great Yarmouth
Theme: Business
Cost: £18m
Timescales: 2021-2022

This project involves the demolition of buildings, refurbishment of the quay and creation of new pontoons on the southern tip of the South Denes peninsula in Great Yarmouth. These upgrades will make the area more accessible than it is at present and attract further investment from companies engaged with offshore wind farm development and maintenance (O&M). Associated infrastructure has also been upgraded to optimise the land for future development.



Name: Norwich Research Park Expansion
Location: Norwich
Theme: Business
Timescales: 2021-2031

The Norwich Research Park has plans to bring forward 450,000 sq ft GIA of additional commercial space over the next ten years to support the Life Science sector. Priority investments include two innovation centres, a new incubator hub, a Diagnostic Assessment Centre (DAC) and John Innes Centre's proposed HP3 development (Healthy Plants, Healthy Planet and Healthy People). The first project to come forward is expected to be Innovation Centre II which will provide almost 42,000 sq ft (NIA) of new commercial space.



Name: A47 Upgrades
Location: A47 Corridor
Theme: Business and Place
Cost: £300m
Timescales: 2020-

£300m of improvements have been committed by Government and the Highways Agency to improve several stretches of the A47. Commitments include: dualling between North Tuddenham and Easton, dualling between Blofield and North Burlingham, improving the Thickthorn Junction and improving the A47 Great Yarmouth Junction. A campaign called 'Just Dual It' has been launched to encourage the Highways Agency and Government to dual the entire length of the A47.



Name: Smart Emerging Technology Institute
Location: Norwich
Theme: Business
Timescales: 2020-2024

The Universities of East Anglia, Cambridge and Essex, alongside BT and the Norwich Cambridge Tech Corridor, are working to develop the East of England Smart Emerging Technologies Institute (SETI). This has two aspirations: 1) To create a closed high-speed data loop connecting the Norwich Research Park, the University of Cambridge, the University of Essex and BT at Adastral Park. This would enable the high-speed transfer and processing of large quantities of data, which will support research and enterprise activities like the development and testing of AI algorithms. 2) To deliver education and training infrastructure at each location focused on the development of specialist big data capabilities and skills.

Selected **On-Going Investments**



Name: Clean Growth For Business
Location: County-wide
Theme: Business
Timescales: 2021

New Anglia LEP are offering a series of webinars, events and resources to help businesses move towards a net zero position. The programme will help businesses learn more and develop plans and targets to help make their business operations cleaner and greener. Support is provided in relation to transport, property, construction, procurement and water.



Name: Norwich Digi Tech Factory
Location: Norwich
Theme: People
Cost: £9m
Timescales: 2020-2021

City College Norwich are currently building a new Digi Tech Factory using funds from New Anglia LEP's Growth Fund. It brings together the college's digital skills provision into a single purpose-built space, allowing the college to increase the number of students and apprentices studying digital courses. It will deliver a range of courses from creative media, to software and programming, and 'hard' digital skills in areas such as networking, infrastructure development, electronics and automated manufacturing.



Name: Norfolk Skills and Careers Festival
Location: Norfolk Showground
Theme: People
Cost: £45k
Timescales: On-Going

The Norfolk Skills and Careers Festival is an interactive event aimed at young people to help inspire them for their future career and to demonstrate the various options available. The Festival is structured around thirteen sectors covering Energy, Advanced Manufacturing, ICT – Digital and Creative, Financial and Business Services, Leisure, Tourism and Culture, Food and Farming, Science and Innovation, Health and Social Care, Construction and Logistics, Education and Training, Public Services, Retail and Enterprise, and Careers advice.



Name: Great Yarmouth Town Centre Regeneration
Location: Great Yarmouth
Theme: Place
Cost: £13.7m

Great Yarmouth Borough Council have secured £13.7m from the Government's Future High Street Fund to help revive Great Yarmouth Town Centre as a vibrant economic, cultural, and community hub. Priority projects include an enhanced library, new homes, redeveloping the marketplace, creating a heritage centre, and introducing more planting and greenery.

1.3

Norfolk's Businesses



Business: Evidence Summary

An important economy



Home to **39,500** businesses and **389,000** employees that contribute almost **£19bn** in Gross Value Added to the national economy each year

An economy with important clusters



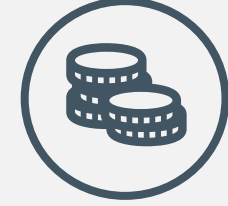
For example, Clean Energy in Great Yarmouth, Life Sciences at the Norwich Research Park, Creative and Digital in Norwich and one of the largest general insurance clusters outside of London

A slower growth economy



Business and employment figures are increasing (**+13%** and **+9%** since 2010 respectively) but more slowly than at the national level (29% and 14%)

A lower-wage economy



The biggest employment and business sectors are health, retail, education, manufacturing, construction, and hospitality

A lower-value economy



While Norfolk contributes £19bn in Gross Value Added, its contribution *per head* is well below the national average (**£21k** vs £29k)

An economy with regional variations



Norwich and Broadland make a significant contribution to the economy (£4bn and £3bn per year), which is much higher than North Norfolk and Great Yarmouth (£1.6bn and £1.8bn)

An economy with opportunities



There are growing specialisms in higher-value parts of the economy, including Clean Energy, Knowledge Economy, Life Sciences, Digital/Creative, and Agri-Food

An economy with relatively low innovation



Business start-up rates (**10%**) are below the national average (13%) as is uptake of innovation funds and the proportion of high-growth businesses is lower than in comparator areas (e.g. Cambridge and Cornwall)

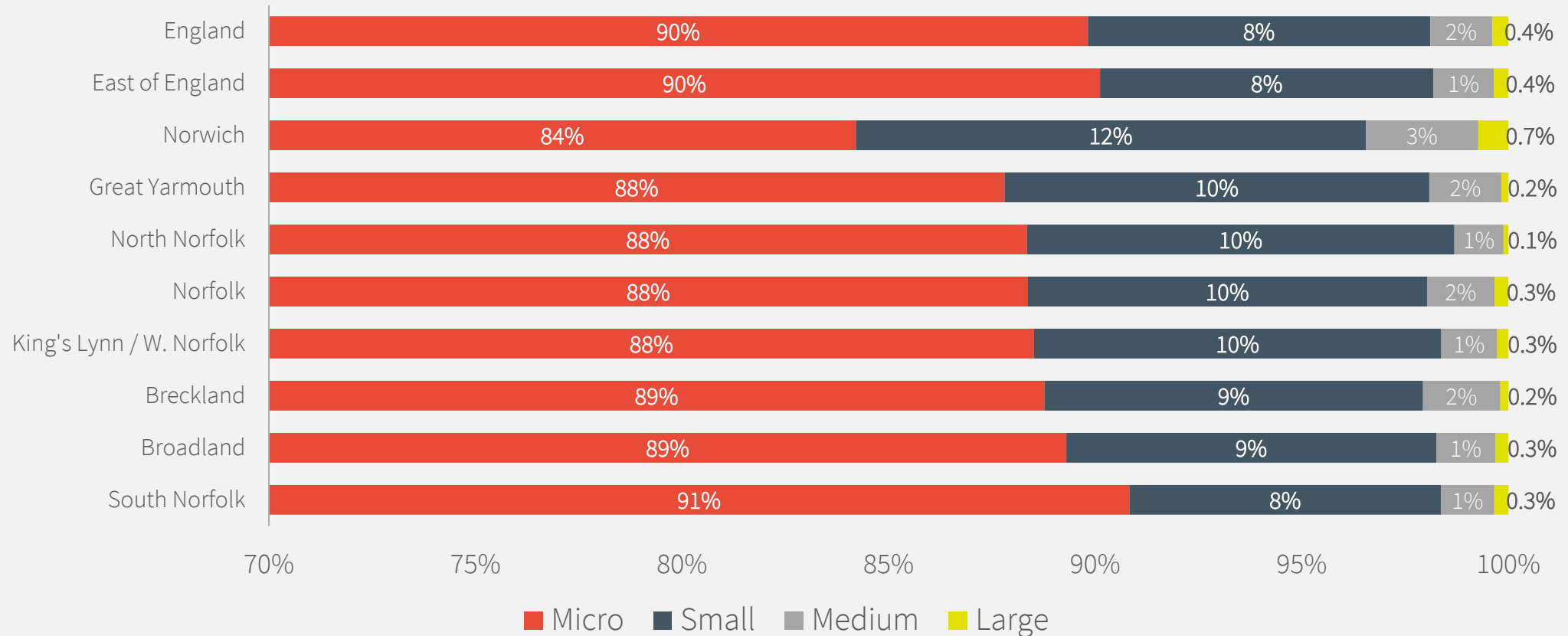
Norfolk's business base

A micro-business dominated economy...

Norfolk is home to around 33,150 businesses. Of which 88% are classified as micro-businesses.. Despite this apparent domination of the local economy, this is marginally lower than the East of England (90%) and England (90%). Norwich stands out as Norfolk's major urban centre with a tendency towards larger businesses.

NB business size is largely defined according to number of employees. A micro business is defined as having fewer than 10 people employed, Small (fewer than 50 employees), medium (fewer than 250 employees) and large (above 250 employees).

Proportion of businesses by size, 2021



Norfolk's business base (2)

Home to a unique sectoral mix of businesses...

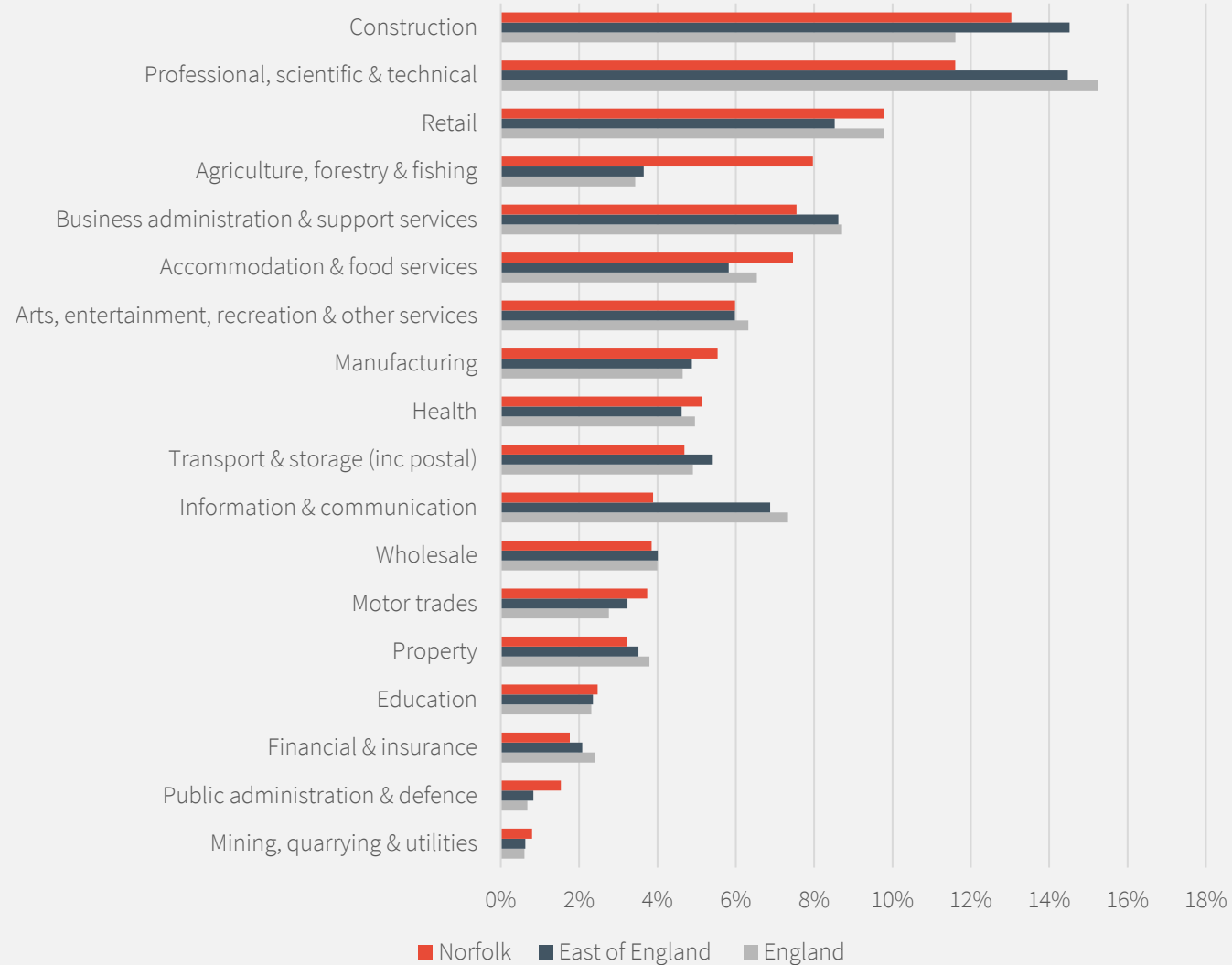
The sectors accounting for the largest shares of Norfolk's businesses are construction (13%), professional, scientific and technical (12%) and retail (10%).

While the retail split is in line with the national average (10%), construction businesses make up a larger proportion of the economy than they do nationwide (12%) and professional, scientific and technical businesses are much less well represented than across England as a whole (15%).

This is also the case for smaller but increasingly important knowledge economy sectors like Information and Communication. These firms represent about 7% of the East of England and national business base compared to just 4% of businesses in Norfolk.

Agriculture, forestry and fishing on the other hand represents a clear specialism in the Norfolk economy. Although this sector makes up a relatively small part of the national business base (3%) it is the fourth largest sector (by count of businesses) in Norfolk – accounting for 8% of all businesses.

Proportion of businesses by sector, 2021



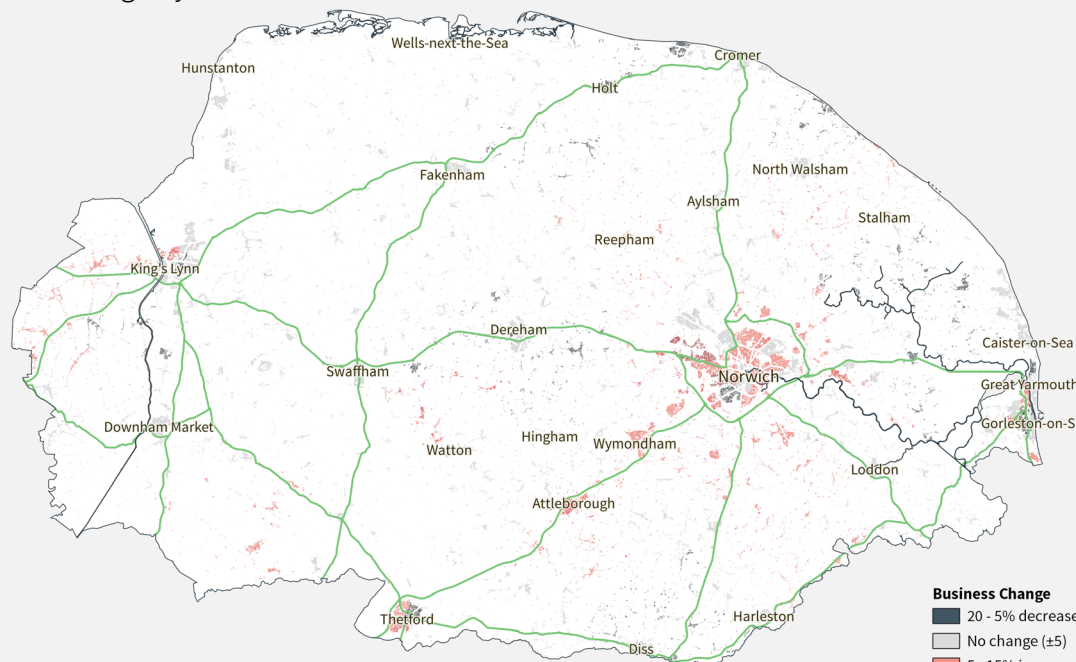
Norfolk's growing business base

Norfolk's business base has experienced slow growth over the past decade...

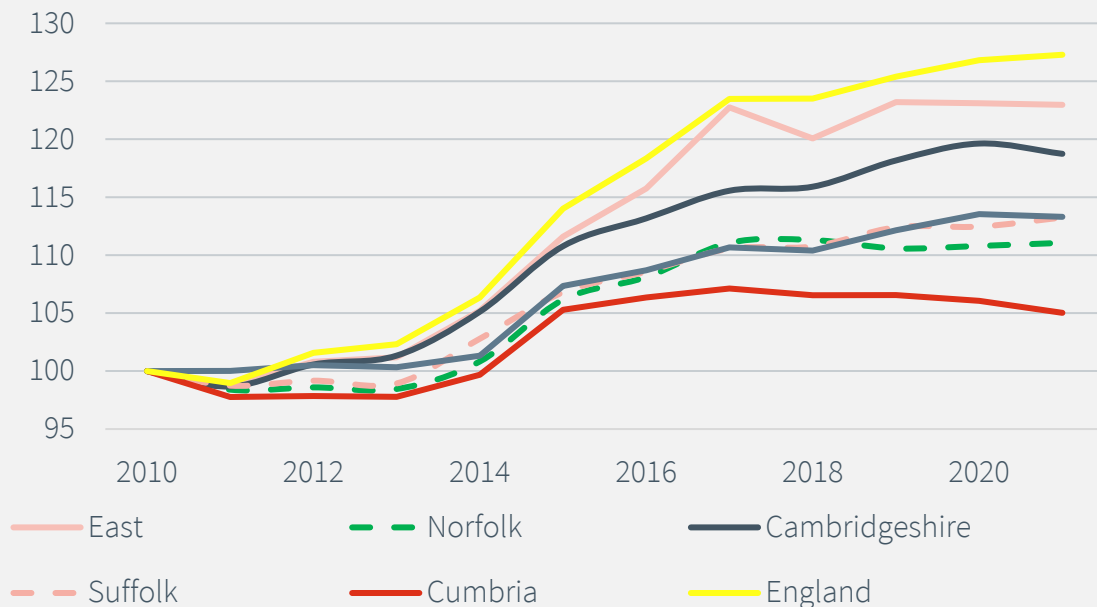
Norfolk's business base has increased by 11% since 2010, compared to the English growth rate of 27%.

Growth in the business base has been concentrated in South Norfolk (18%) and Norwich (16%) meanwhile North Norfolk (4%) and Great Yarmouth (4%) have experienced significantly lower growth rates.

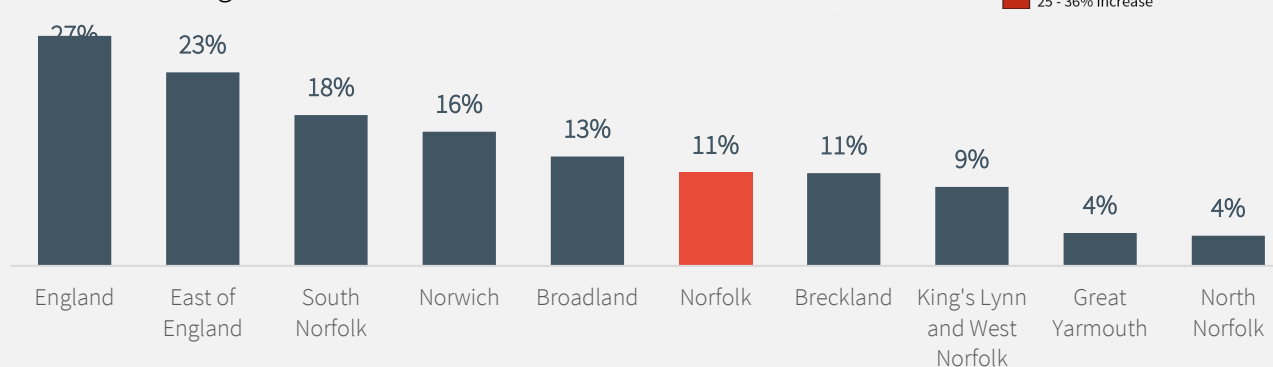
Business change by MSOA, 2016-2020



Business change, 2010-2020 (Index 100 = 2010)



Business change, 2010-2020



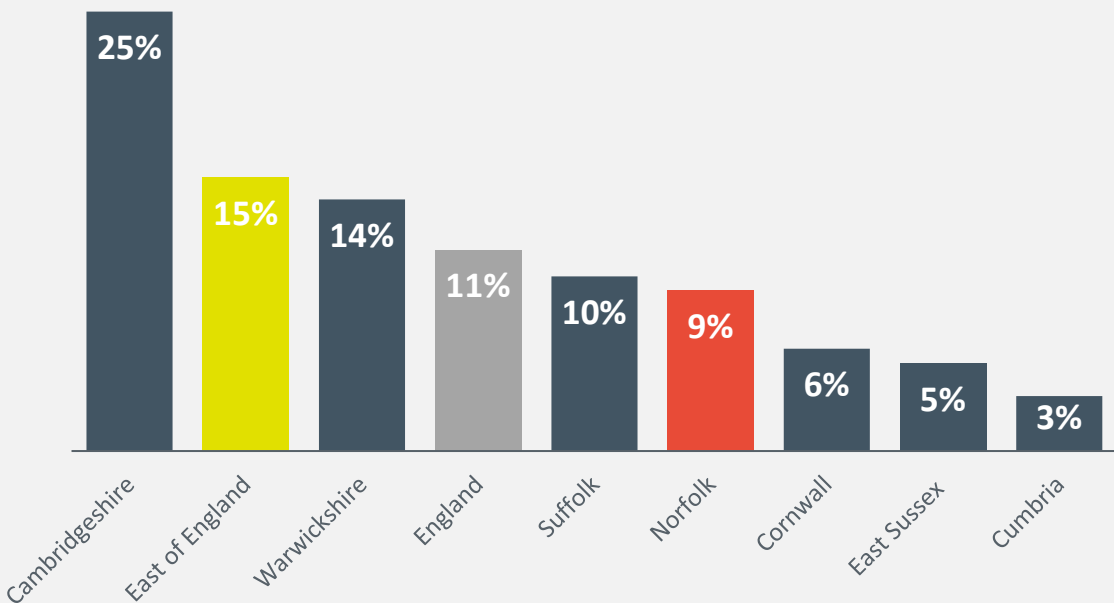
Scale of Norfolk's employment base

Health, retail and manufacturing are key employment sectors in Norfolk...

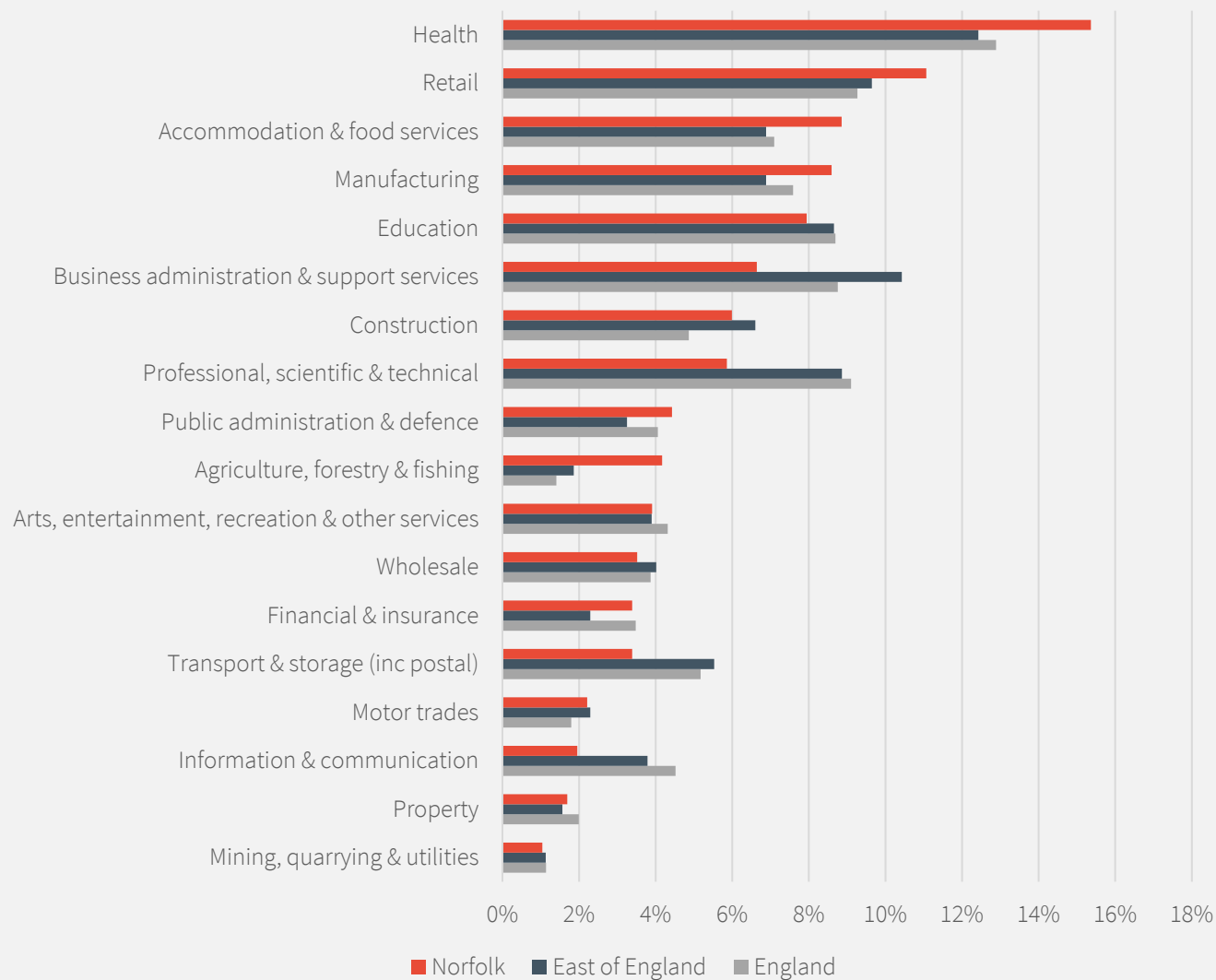
Health, retail and manufacturing account for 35% of total employment in Norfolk and each account for higher proportions of the employment base than is seen at the East of England and England level.

The number of employees in Norfolk has grown by 9% since 2010 equivalent to 31,500 jobs. This is lower than the scale of change seen across the East of England (15%) and England (11%).

Employment Change 2010-2020



Employment by sector, 2020



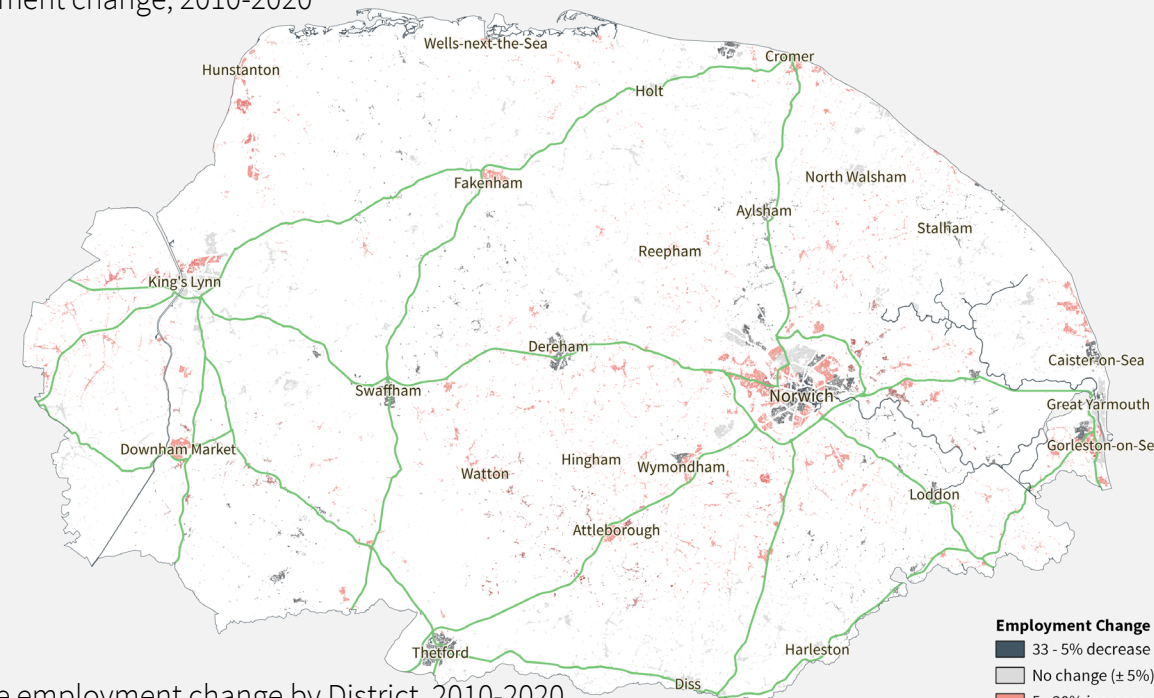
Nature of Norfolk's employment change

Employment growth has been uneven across Norfolk...

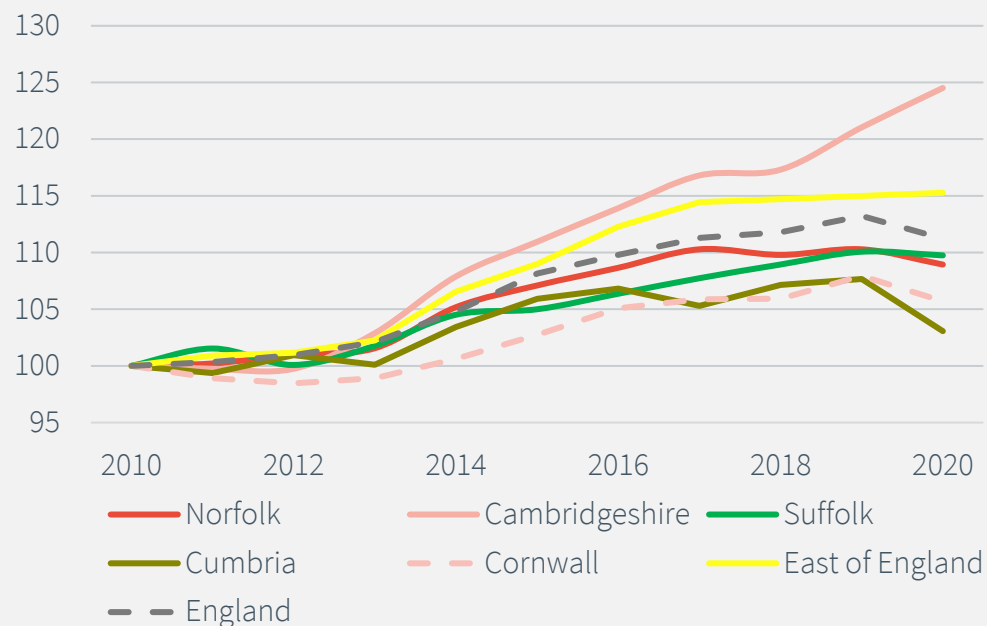
There have been dips in employment across Norfolk's coastal towns including Wells-next-the-Sea and Great Yarmouth, with pockets of losses in Norwich and Thetford.

Within Norfolk, since 2010, South Norfolk has experienced the strongest employment growth (additional 9,300 jobs or 19%) followed by Breckland (additional 7,800 jobs or 18%). Great Yarmouth is the only district to have experienced a net decline in employment over the period of 800 jobs, a 2% loss.

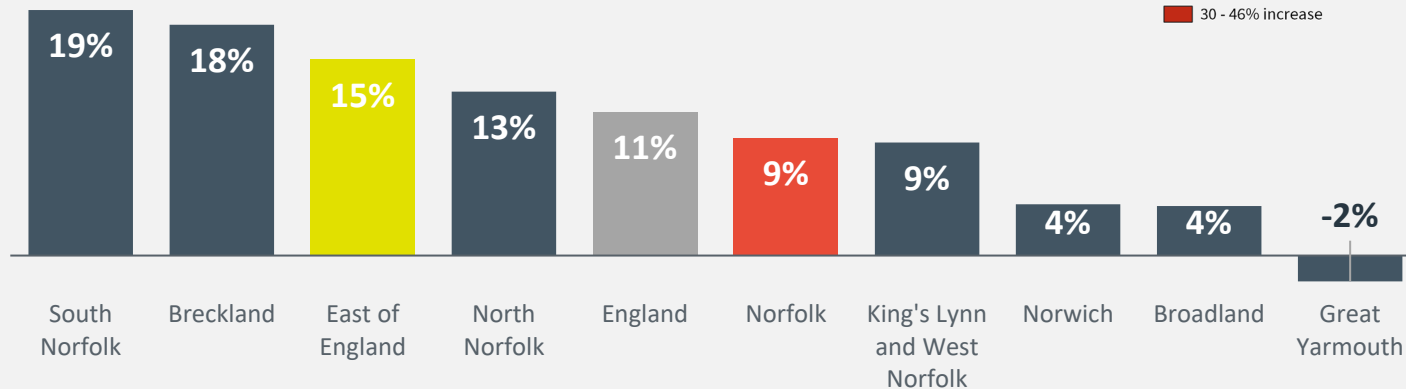
Employment change, 2010-2020



Changes to number of jobs between, 2010-2020 (Index 100 = 2010)



Percentage employment change by District, 2010-2020



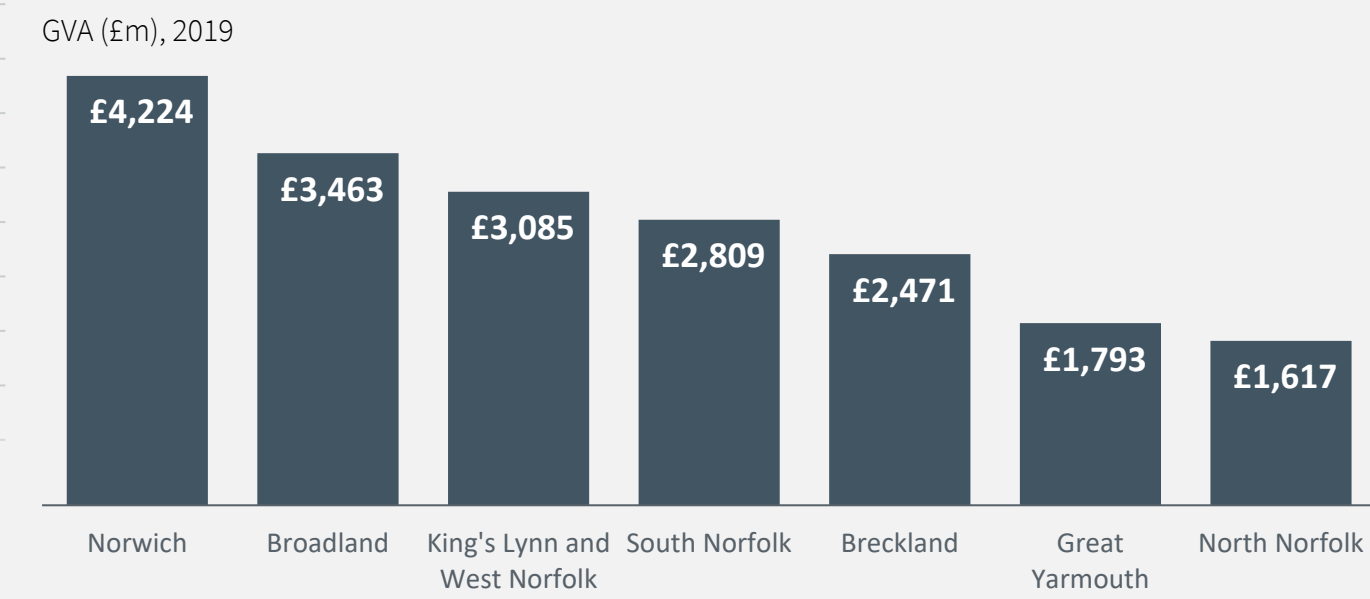
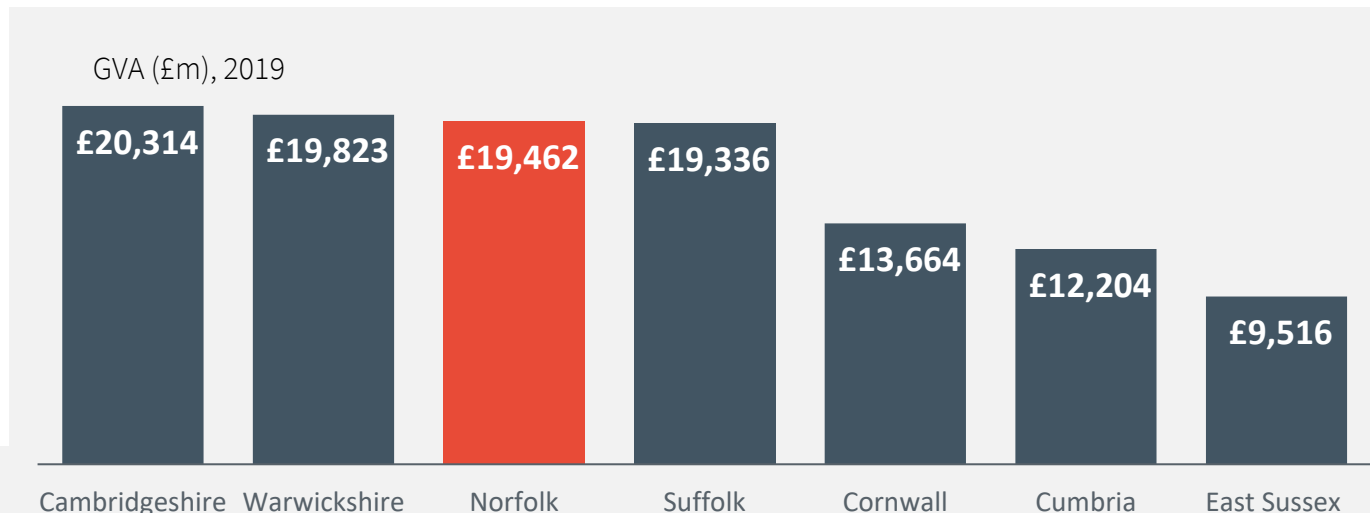
Norfolk's economic output

Despite low productivity, Norfolk's size means it is a place of significant economic output...

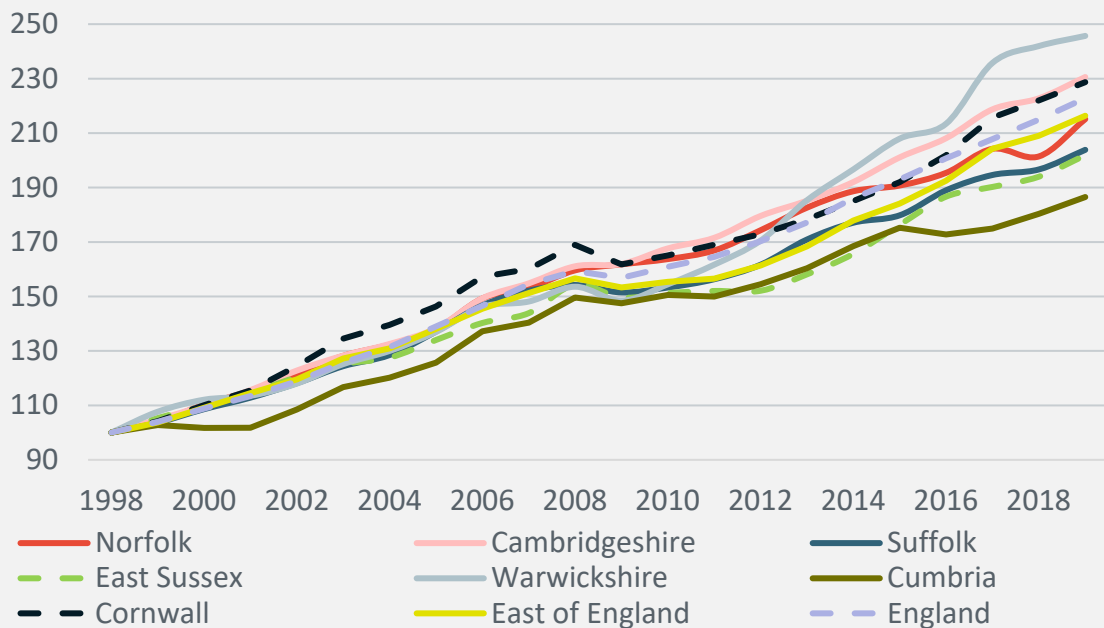
Norfolk contributed £19.5 billion in GVA during 2019.

Since 1998, Norfolk has experienced GVA growth of 215% which is below the East of England (216%) and England (223%) averages.

In 2019, Norwich contributed the largest share of Norfolk's GVA (£4.2 bn) followed by Broadland (£3.5 bn) and King's Lynn and West Norfolk (£3.1 bn).



GVA change, 1998-2019 (Index 100=1998)

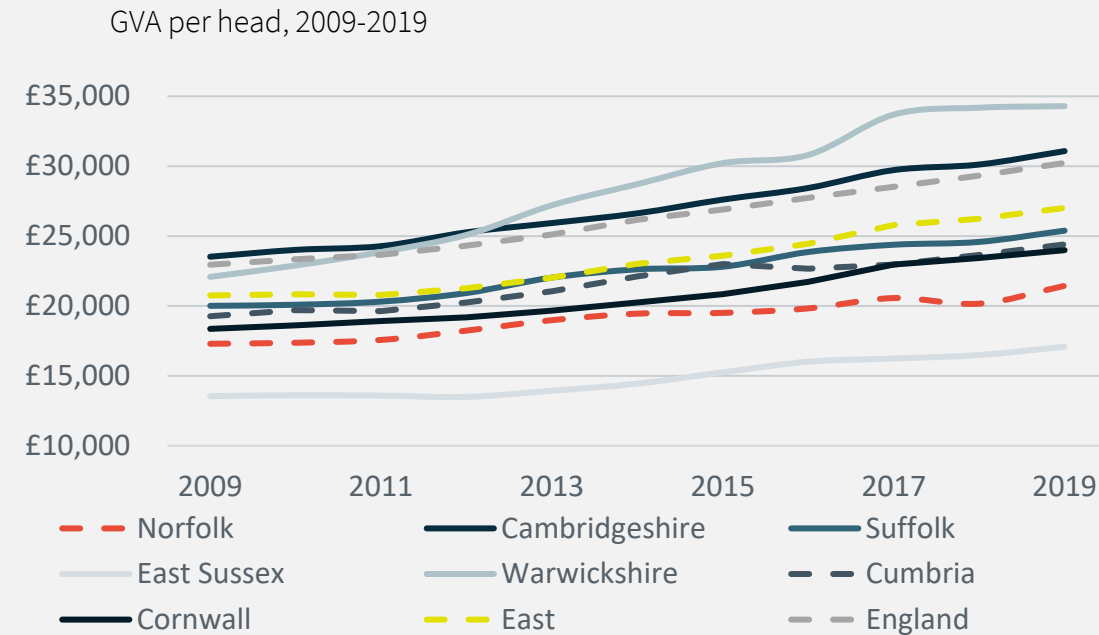
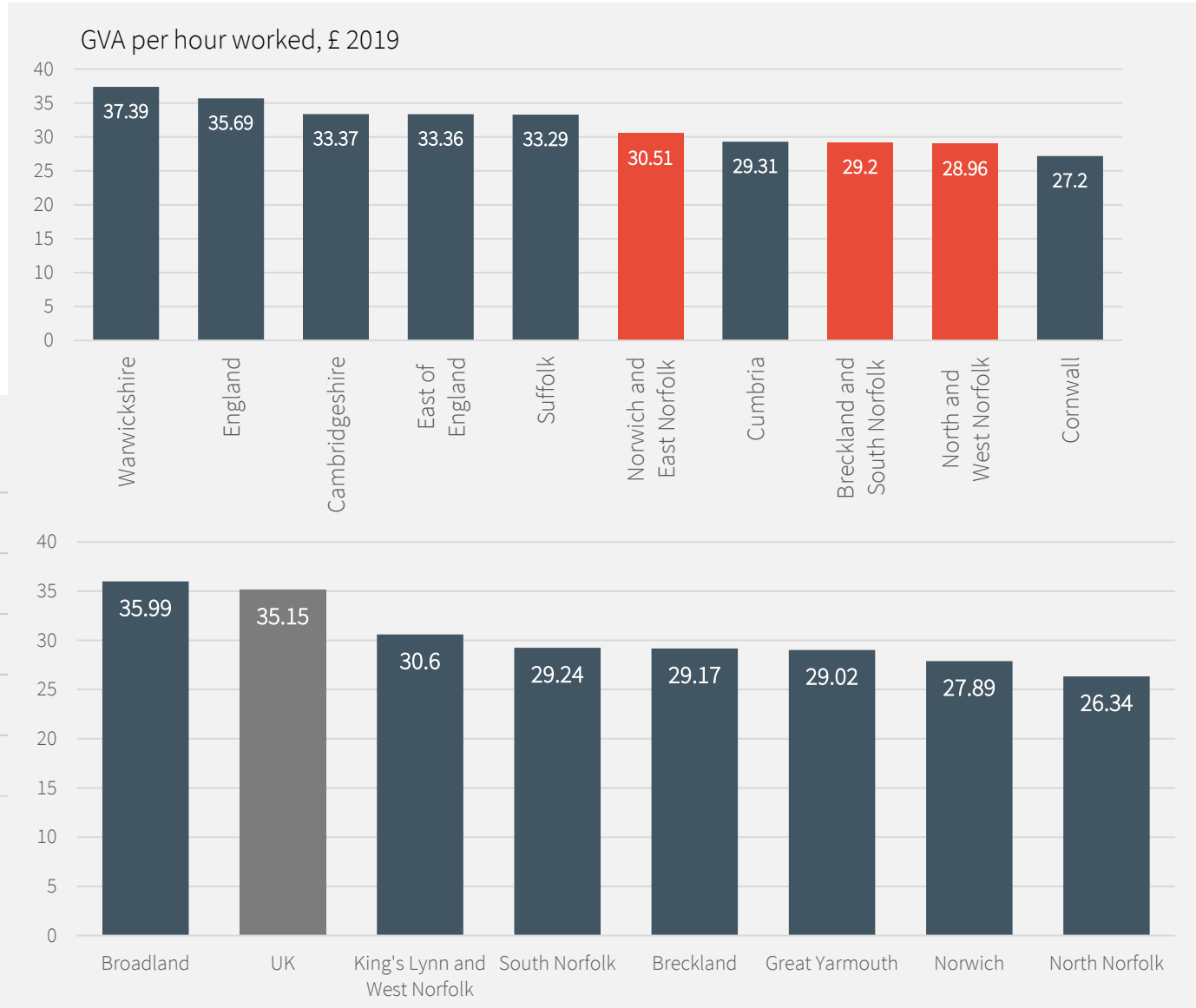


Norfolk's productivity

Output per capita trails behind other areas...

Gross Value Added (GVA) per hour worked was £29.75 in Norfolk, based on a simple average across the seven local authority districts. Broadland had the highest GVA per hour of £35.99 and North Norfolk had the lowest of £26.34. Norwich is one of the weaker districts on this measure.

When productivity is measured by economic output per person the results look quite different. Output per capita in Norfolk was £21,440 which is lower than the national average of £30,239 and East of England average at £27,015. However, Norwich has the highest average output per head of all districts (£30,048) on this measure and is the only district to exceed the East of England average (£27,015). This suggests that in commuting to Norwich causes high output per (resident) person which somewhat masks lower per hour productivity.



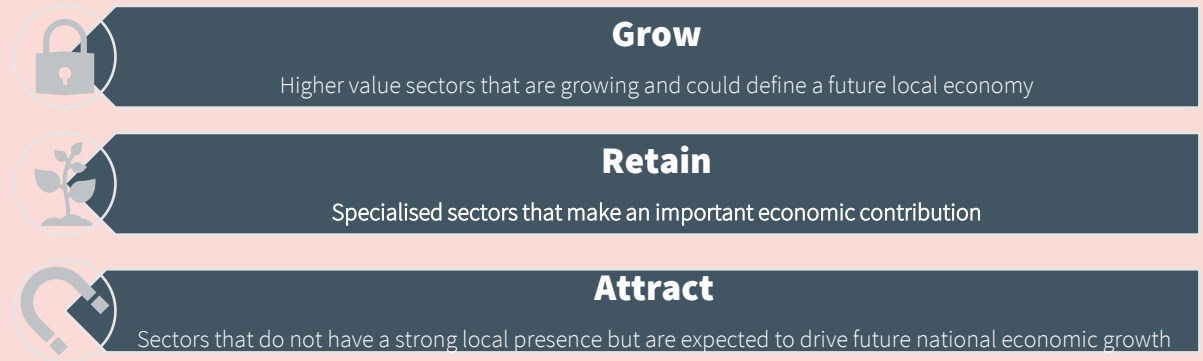
Source: ONS, Regional Gross Value Added (2019); ONS, Mid-Year Population Estimates (2019). * No difference in area type between dashed and solid lines



Focus On: Norfolk's Sectors

Norfolk has a broad and diverse economy...

The following pages provide a deep dive into the County's sectors and identify which should be (a) supported to grow, (b) retained and/or (c) attracted to the county as per the diagram on the right. The analysis primarily focuses on the 'standard' sectors in red below which are pre-defined by the Office for National Statistics using Standard Industrial Classification (SIC) codes – they capture all employment and business activity in the county. Analysis also considers the five non-standard cross-cutting sectors in blue, which are identified in regional policy as local specialisms. This draws on other Government and best practice definitions which utilise a range of SIC codes from across the different standard sectors. The employment and business numbers reported for the cross-cutting sectors are therefore not 'additional' to those in the standard sectors.



Standard Sectors

Business administration & support services	Accommodation & food services	Wholesale	Arts, entertainment, recreation and other services	Mining, quarrying and utilities	Health
Property	Manufacturing	Agriculture, forestry and fishing	Public administration & defence	Financial & insurance	Information & communication
Motor trades	Education	Professional, scientific & technical	Transport & storage	Construction	Retail

Cross-Cutting Sectors

Clean Energy	Knowledge Economy	Life Sciences
Agri-Food	Digital / Creative	

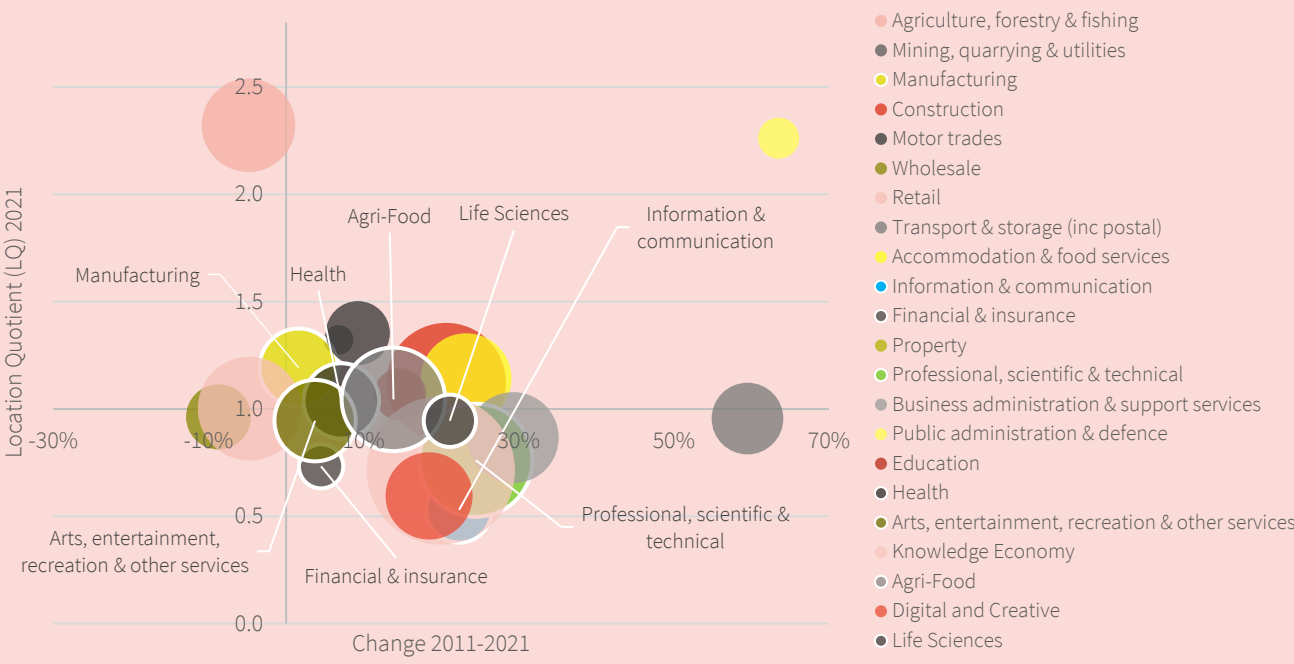


Norfolk's Sectors: **Business** Sectors

Some of Norfolk's largest business sectors are its fastest growing...

Professional, scientific & technical and business administration & support services are some of Norfolk's largest and fastest growing business sectors.

Business Sector Size, Specialisation and Growth



Largest Sectors

- + Construction (5,100 businesses)
- + Professional, scientific & technical (4,600 businesses)
- + Retail (3,900 businesses)
- + Agriculture, forestry & fishing (3,100 businesses)
- + Business administration & support services (3,000 businesses)

Highest Growth

- + Public administration & defence (64% growth since 2011)
- + Transport & storage (59% growth since 2011)
- + Business administration & support services (29% growth since 2011)
- + Professional, scientific & technical (25% growth since 2011)

Largest Fall

- + Wholesale (9% fall since 2011)
- + Agriculture, forestry & fishing (5% fall since 2011)

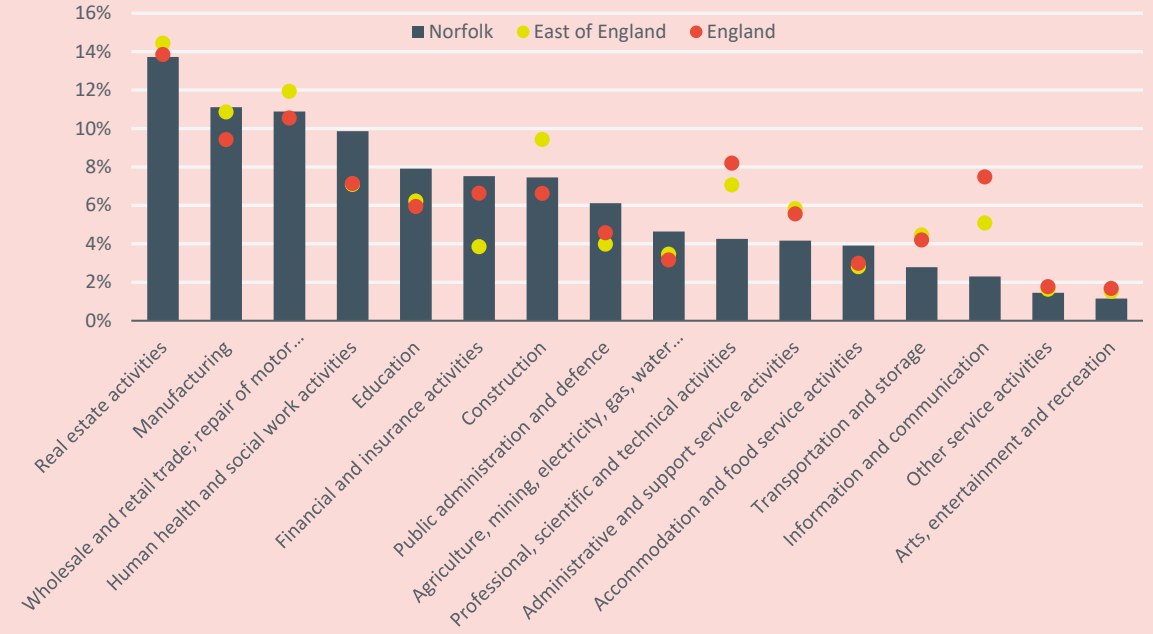
Most Specialised

- + Agriculture, forestry & fishing (LQ of 2.3)
- + Public administration & defence (LQ of 2.3)
- + Motor trades (LQ of 1.4)
- + Mining, quarrying & utilities (LQ of 1.3)

Most Valuable

- + Real estate activities (£2.7bn to GVA PA)
- + Manufacturing (£2.2bn to GVA PA)
- + Wholesale and retail trade (£2.2bn to GVA PA)
- + Human health and social work (£1.9bn to GVA PA)
- + Education (£1.5bn to GVA PA)
- + Financial and insurance activities (£1.5bn to GVA PA)

GVA Contributions By Sector, 2019



Source: UK Business Count, ONS (2021); ONS, Regional Gross Value Added (2019). Note: the size of the bubble is proportional to the size of the business sector in 2021.

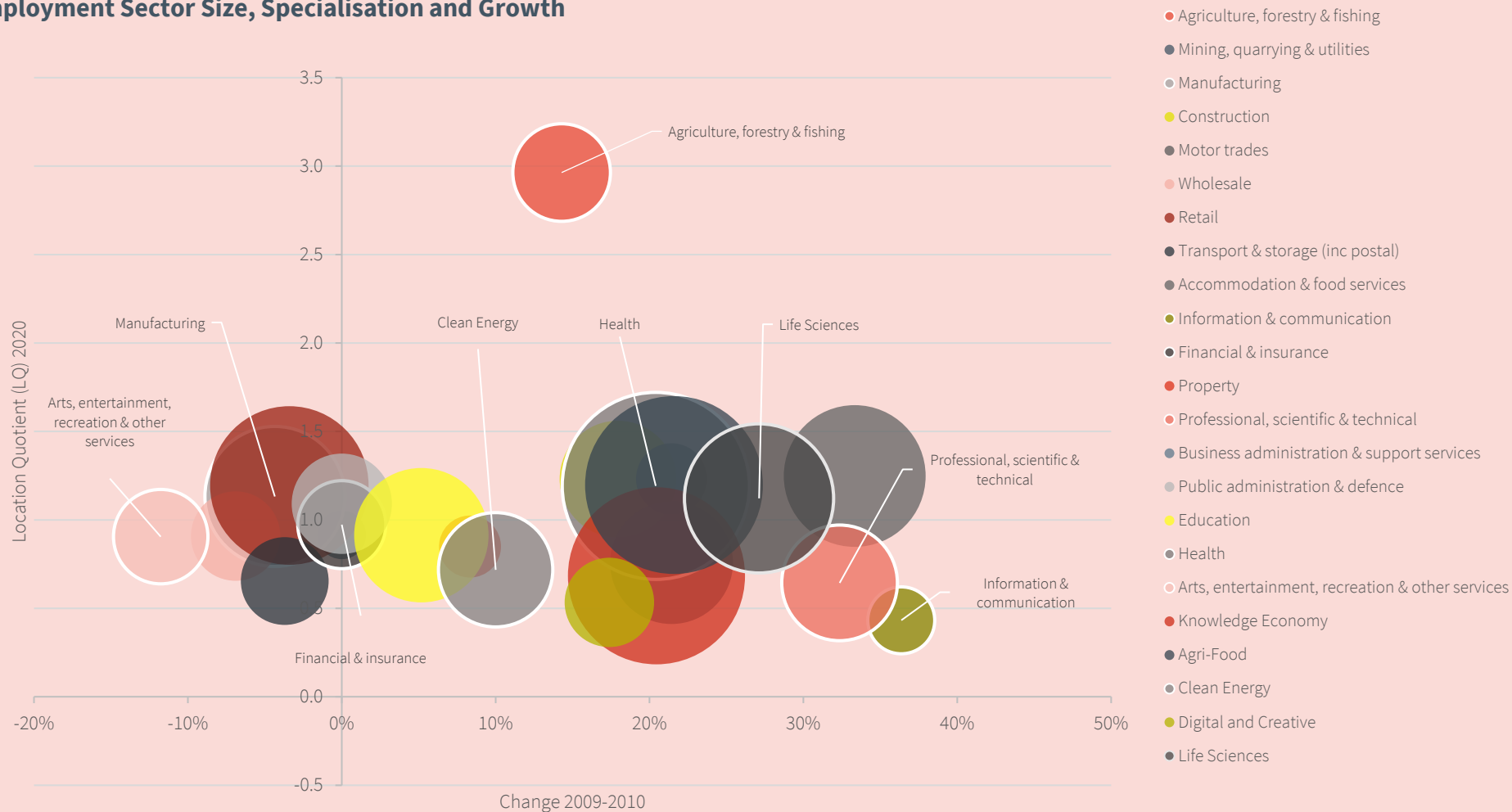


Norfolk's Sectors: **Employment** Sectors

Some of Norfolk's fastest growing employment sectors are high value...

Health, retail and accommodation and food services are Norfolk's largest employment sectors, whilst growth is concentrated in information and communication, accommodation and food services, and professional, scientific and technical sectors. Real estate, financial and insurance activities, and construction are Norfolk's most productive sectors.

Employment Sector Size, Specialisation and Growth



Largest Fall

- + Property (13% fall since 2010)
- + Arts, entertainment, recreation & other services (12% fall since 2010)
- + Wholesale (7% fall since 2010)
- + Manufacturing (4% fall since 2010)
- + Transport & storage (4% fall since 2010)

Highest Growth

- + Information & communication (36% growth since 2010)
- + Accommodation & food services (33% growth since 2010)
- + Professional, scientific & technical (32% growth since 2010)
- + Life sciences (27% growth since 2010)
- + Agri-Food (22% growth since 2010)

Largest Sectors

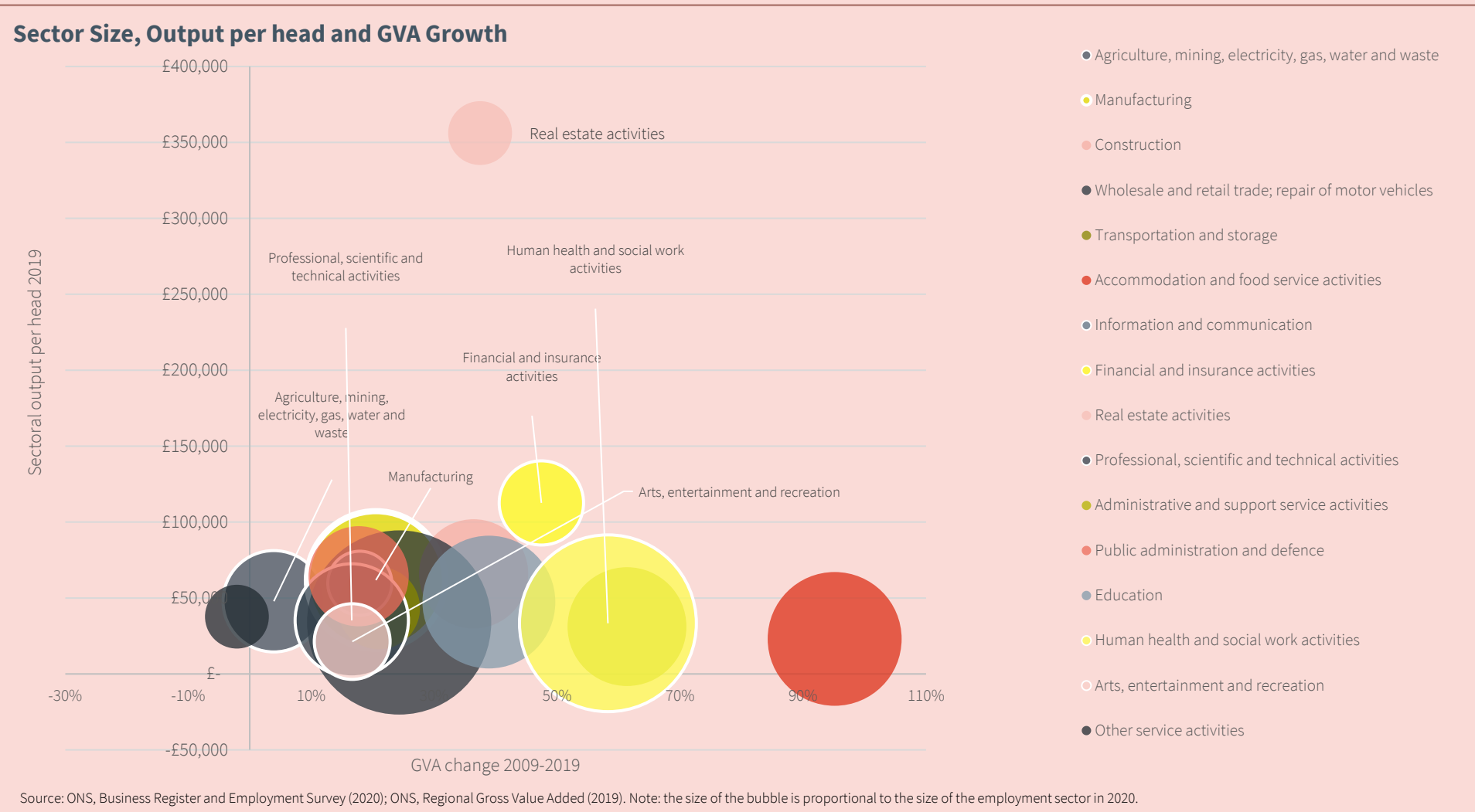
- + Health (59,000 employees)
- + Retail (42,500 employees)
- + Accommodation & food services (34,000 employees)
- + Manufacturing (33,000 employees)
- + Education (30,500 employees)
- + Business administration & support services (25,500 employees)



Norfolk's Sectors: **Employment** Sectors

Some of Norfolk's fastest growing employment sectors are high value...

Health, retail and accommodation and food services are Norfolk's largest employment sectors, whilst growth is concentrated in information and communication, accommodation and food services, and professional, scientific and technical sectors. Real estate, financial and insurance activities, and construction are Norfolk's most productive sectors.



Most Specialised

- + Agriculture, forestry & fishing (LQ of 3.0)
- + Accommodation & food services (LQ of 1.2)
- + Motor trades (LQ of 1.2)
- + Construction (LQ of 1.2)
- + Agri-Food (LQ of 1.2)
- + Retail (LQ of 1.2)

High Value/High Growth

- + Real estate activities
- + Financial and insurance

High Value/Highly Specialised

- + Construction



Norfolk's Sectors: Employment Projections

Administration, arts and health are expected to drive employment growth over the next two decades...

The Oxford Economics Local Forecasting Service suggests a large fall across some of Norfolk's current employment specialisms. Some of the largest declines in jobs by 2040 are expected in:

- + Manufacturing (14,200 jobs)
- + Wholesale and retail (2,700 jobs)
- + Agriculture, forestry and fishing (2,000 jobs)

Simultaneously, there is forecast to be significant employment gains in Norfolk over this same period. Sectors with the largest absolute jobs growth include:

- + Human health and social work (15,200 jobs)
- + Professional, scientific and technical (5,300 jobs)
- + Administrative and support (5,300 jobs)

Growth



+26% Administration and support vs +25% in the UK



+25% Arts, entertainment and recreation vs +18% in the UK



+25% Human health and social work vs +23% in the UK

Decline



-58% Mining & quarrying vs -54% in the UK

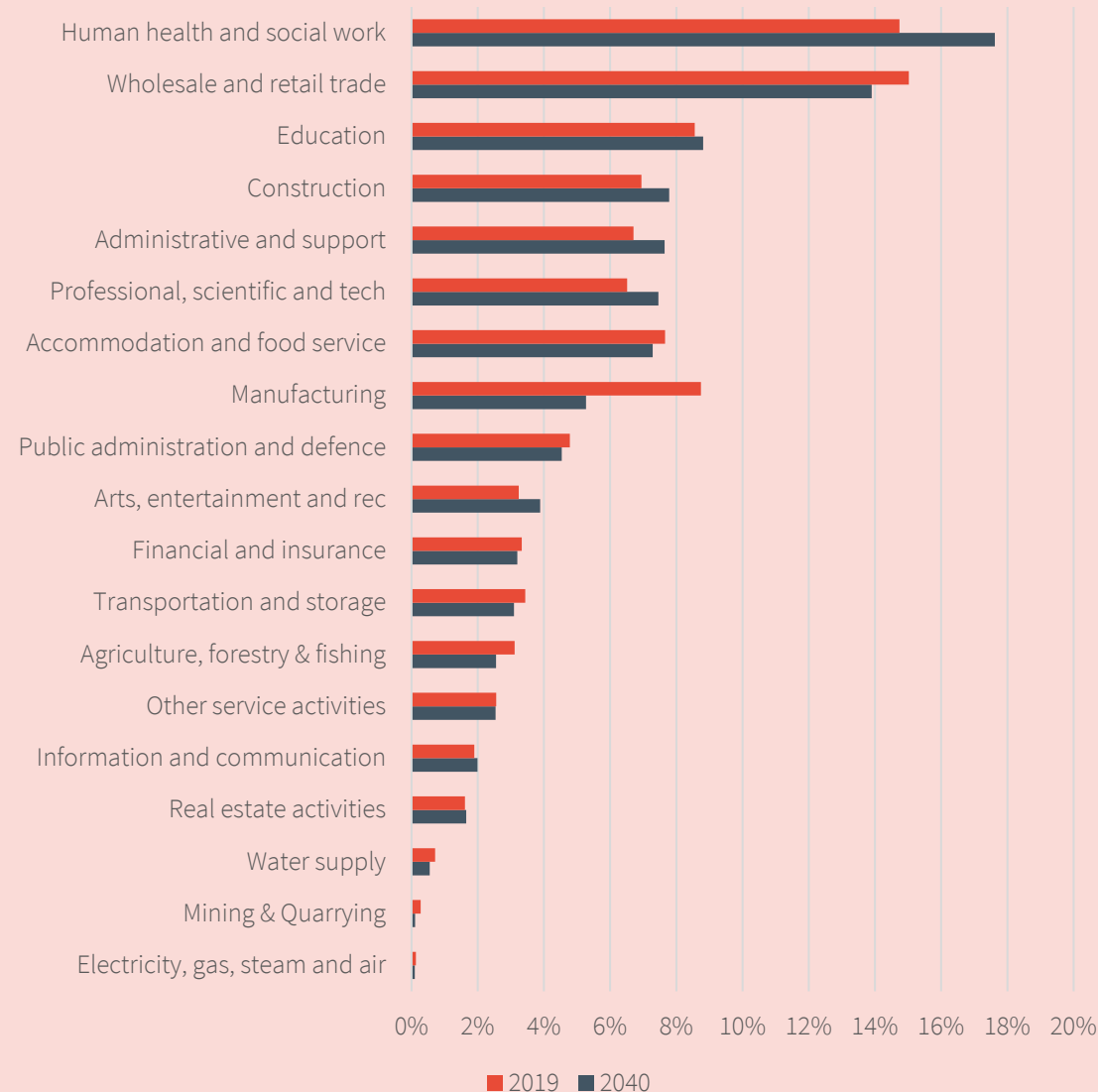


-35% Manufacturing vs -38% in the UK



-22% Electricity, gas, steam and air vs -14% in the UK

Projected Employment Growth by Sector





Norfolk's Sectors: Output Projections

Knowledge-intensive and health sectors are forecast to drive GVA growth over the next two decades...

The Oxford Economics Local Forecasting Service also assess potential changes in GVA at the local level. This shows a significant reprofiling of the Norfolk economy over the next two decades away from elementary occupations into knowledge-intensive sectors.

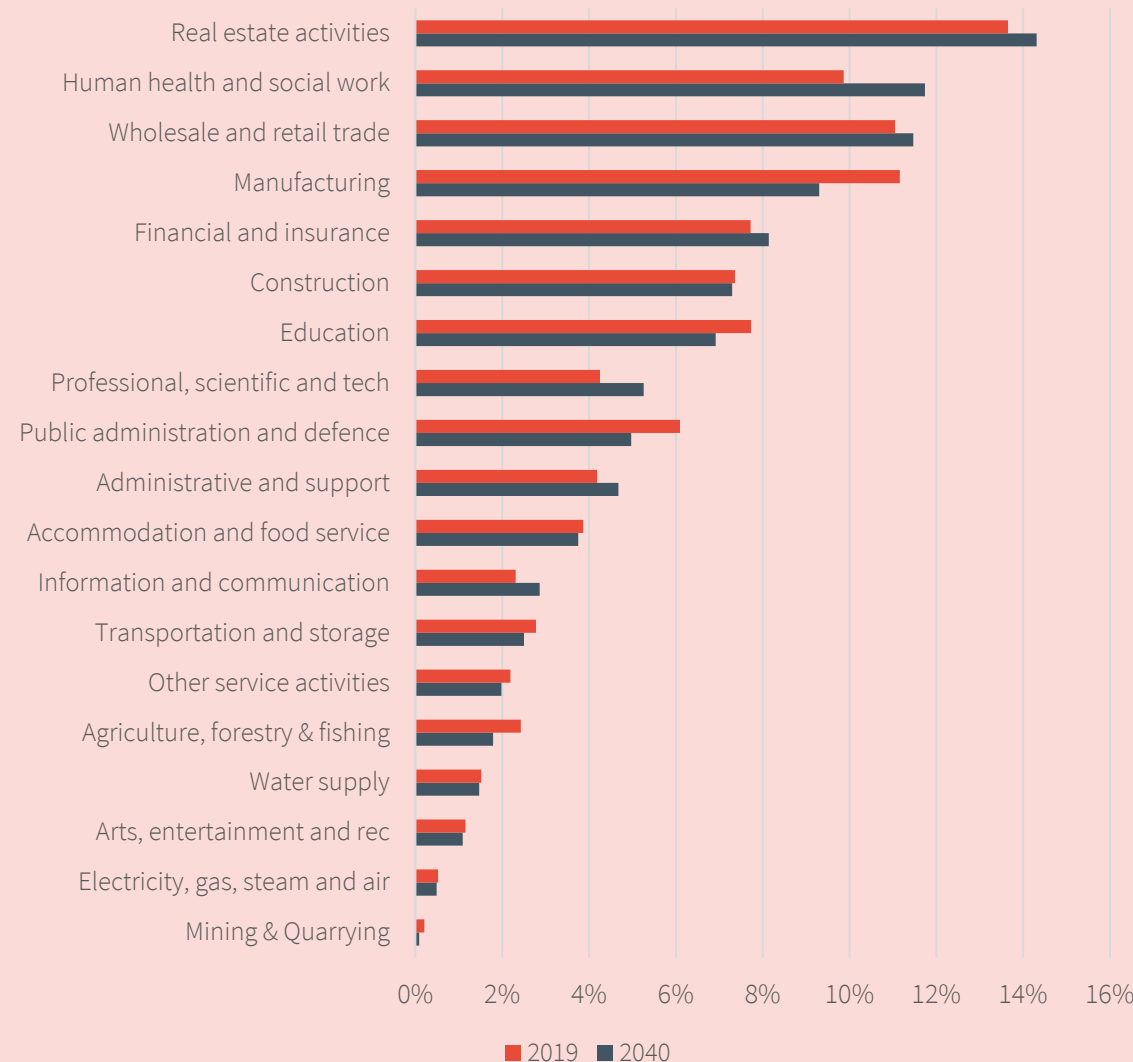
The following sectors are forecast to experience the largest absolute growth in terms of economic output:

- + Human health and social work (+£989m)
- + Real estate activities (+£896m)
- + Wholesale and retail trade (+£697m)

The sectors experiencing the largest decline in economic output include:

- + Agriculture, forestry and fishing (-£26m)
- + Mining and quarrying (-£18m)

Forecast % of total GVA output: 2019 vs 2040



Growth



+59% Information and communication vs +66% in the UK



+59% Professional, scientific and technical vs +68% in the UK



+53% Human health and social work vs +51% in the UK

Decline



-46% Mining & quarrying vs -45% in the UK






-6% Agriculture, forestry and fishing vs -8% in the UK



Norfolk's Sectors: **Prioritising** Sectors

The table below outlines Norfolk's priority sectors in terms of those that should be (a) supported to grow, (b) retained and/or (c) attracted to the county. The evidence to justify these sectors is outlined alongside the relevant policy alignment, as discussed in more detail on previous pages.

Category	Sector	Justification	Policy Alignment
	Life sciences	37,500 people are employed in this sector with 27% employment growth since 2010 and around 1,000 businesses.	Norfolk and Suffolk Economic Strategy; Norfolk and Suffolk Cross-Cutting Skills Report
	Professional, scientific and technical	32% employment growth since 2010 with 25% business growth since 2011 contributes 8% to Norfolk's GVA with this expected to grow 59% by 2040.	Economic Strategy for the East of England; Norfolk and Suffolk Cross-Cutting Skills Report
	Clean energy	Norfolk's utilities sector (electricity, gas, steam, and air) is forecast to experience 22% employment decline by 2040. Meanwhile, clean energy employment in Norfolk has grown by 10% since 2010.	Together for Norfolk; Economic Strategy for the East of England; Norfolk and Suffolk Local Industrial Strategy; Norfolk and Suffolk Cross-Cutting Skills Report
	Human health and social work	Norfolk's largest employment sector in 2019 (59,000 jobs), this sector is forecast to experience significant employment growth of 15,200 jobs by 2040 and already is Norfolk's largest sector (59,000 employees). Projected to experience 53% GVA growth over this same period.	Economic Strategy for the East of England; LEP Skills Advisory Panel's Local Skills Report
	Finance & insurance activities	Equivalent £1.5 bn to GVA. High value jobs in Norfolk are relatively scarce other than finance and insurance. Aviva and Marsh are two of Norwich's largest employers. Largest insurance cluster outside of London.	Norfolk and Suffolk Economic Strategy (2022)
	Agriculture, forestry and fishing	A specialised employment sector (LQ 3.0) this sector is forecast to lose 2,000 jobs by 2040. This sits alongside recent employment growth of agri-food sector by 22% since 2010.	Norfolk and Suffolk Economic Strategy; Norfolk and Suffolk Local Industrial Strategy; Norfolk Rural Economic Strategy
	Manufacturing	Contributes £2.2bn (or 11%) to Norfolk's GVA and employs 33,000 people at present. This sector is forecast to lose 14,200 jobs by 2040. However, the data currently does not capture emerging sectors like Aerospace or MedTech.	LEP Skills Advisory Panel's Local Skills Report
	Information and communication	This sector employs 7,500 people at present representing 35% employment growth since 2010.	Norfolk and Suffolk's Emerging Renewal Plan; Norfolk and Suffolk Local Industrial Strategy
	Arts and entertainment	This sector has experienced a 12% fall in employment since 2010. Despite this, the sector employs 15,000 people and is forecast to grow by 25% by 2040.	Together for Norfolk; Norfolk and Suffolk Local Industrial Strategy

Norfolk's high growth businesses

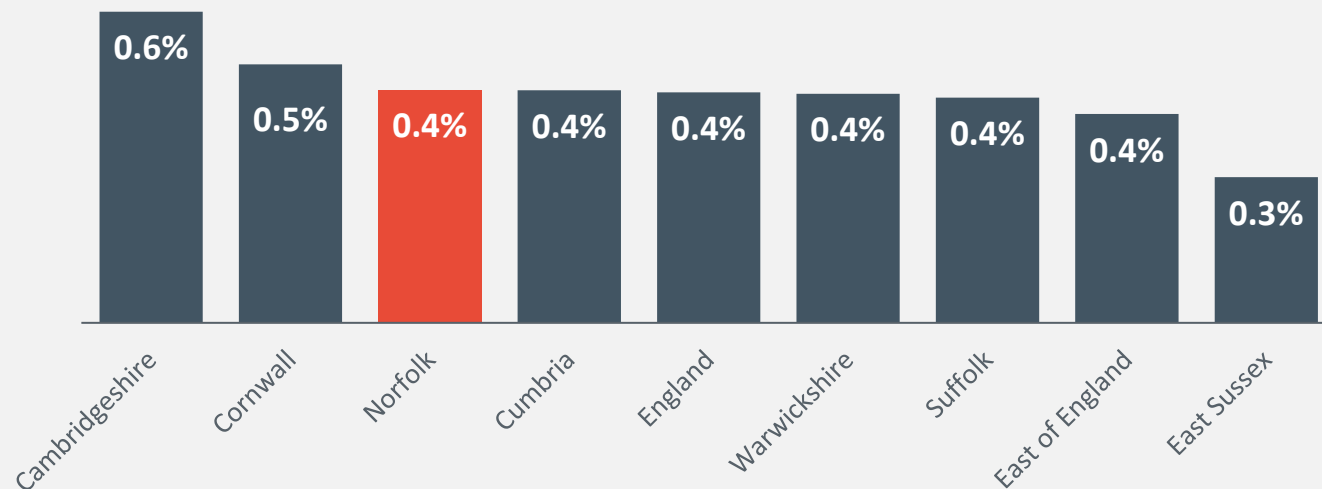
High growth businesses form an important proportion of the Norfolk business landscape...

High growth businesses are measured by the number of businesses with 10 or more employees that experienced an average growth in employment of greater than 20% per year between 2016 to 2019. The high growth rates are calculated as a proportion of the 2019 active businesses with 10 or more employees.

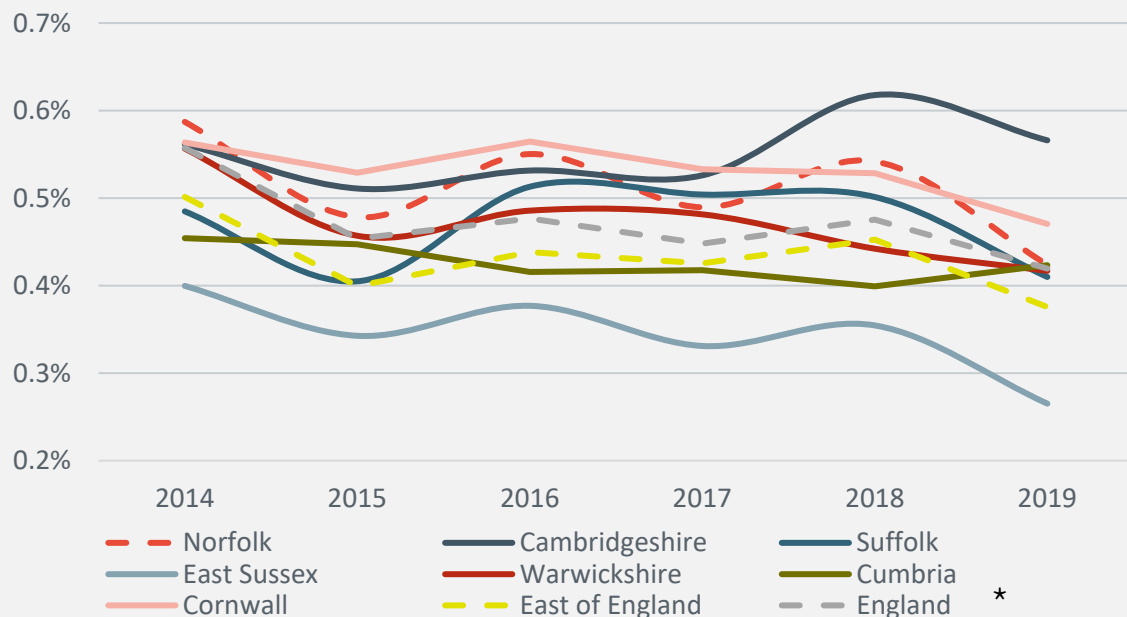
High growth businesses represented 0.4% of active businesses in Norfolk in 2019 which is in line with the East of England (0.4%) and England (0.4%) averages.

Breckland (0.7%) and Norwich (0.6%) have larger shares of high growth enterprises than the Norfolk average (0.4%).

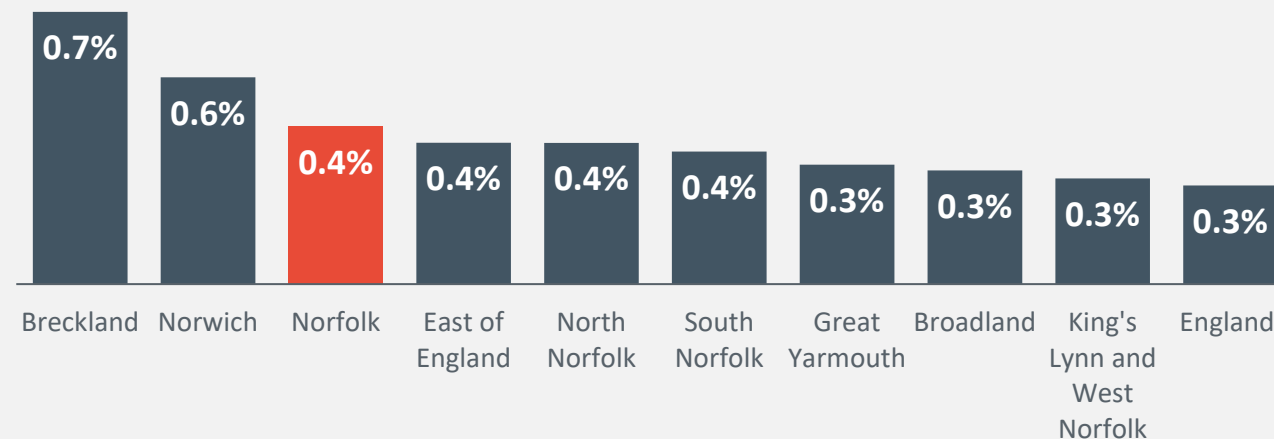
High growth businesses as a proportion of the total business base, 2019



High growth enterprises as a proportion of the total business base, 2014-2019



High growth businesses as a proportion of the total business base, 2019



Norfolk's R&D expenditure

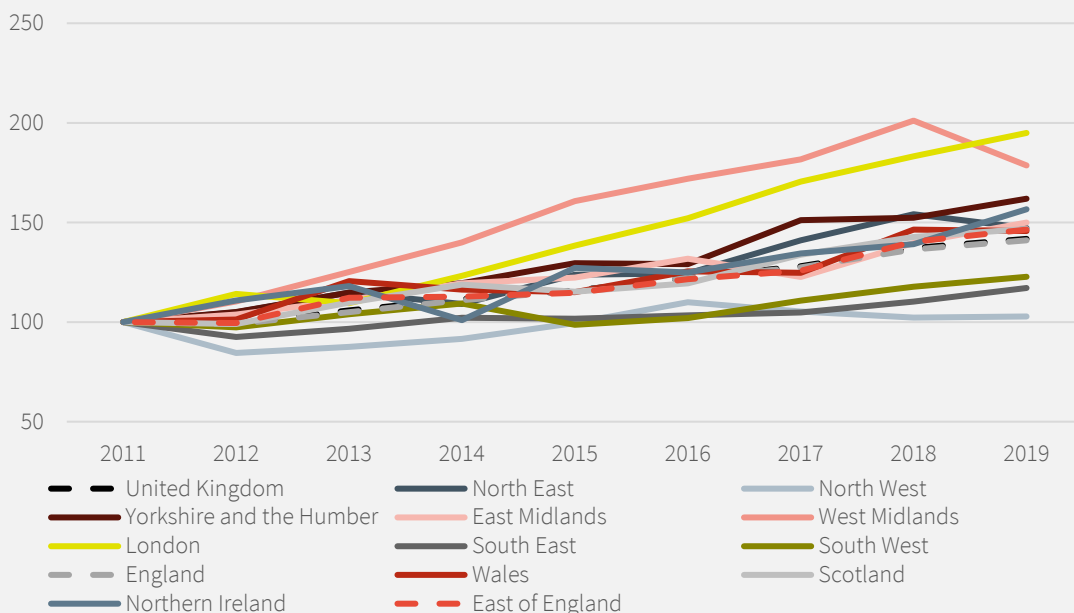
The East of England is the second largest recipient of R&D expenditure in the UK, but Norfolk lags behind...

In 2019, the East of England received £6.9 bn total R&D expenditure equivalent to 18% of all R&D expenditure in the UK. Business expenditure (£5.4 bn) accounted for the largest share of this, equivalent to 18% of total business R&D expenditure received by the UK.

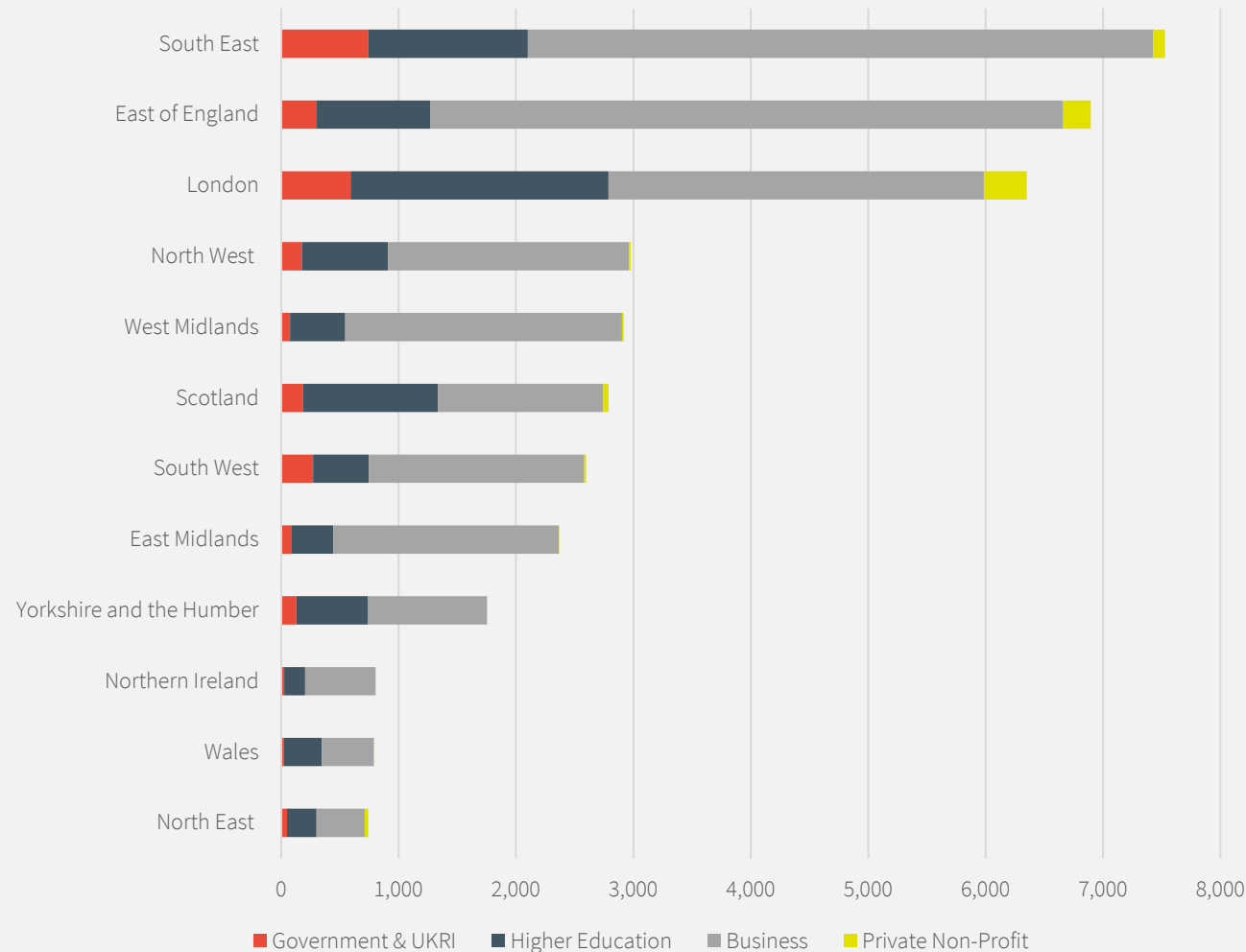
R&D expenditure in the East of England has increased by 46% since 2011, which is slightly above the average for England (41%) and the UK (42%) over this period.

Innovate UK data shows Norfolk had received 0.4% of funds since 2004, significantly lower than other areas in the East of England. R&D expenditure does not benefit Norfolk in the same way it does the East of England and the UK.

Gross domestic R&D expenditure by region, 2011-2019 (Index 100=2011)



Gross domestic R&D expenditure by region, 2019 (£m)



Norfolk's innovation landscape

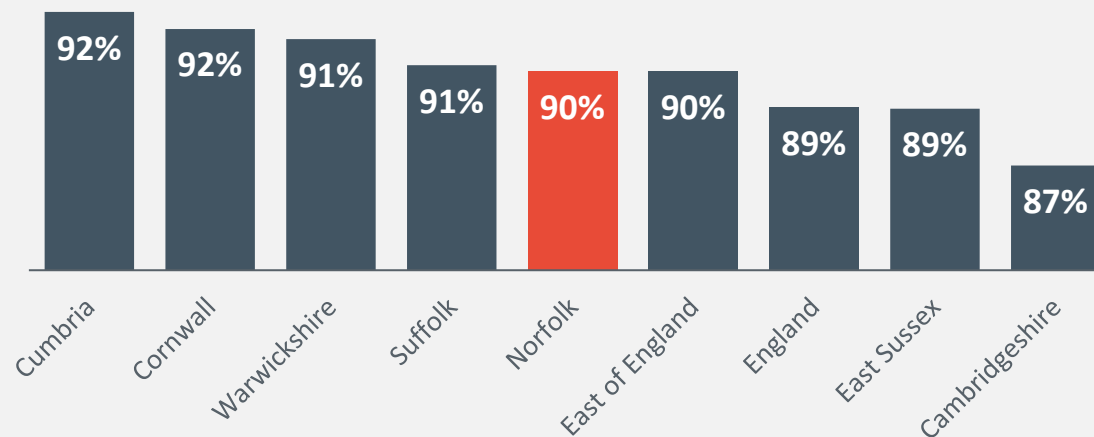
Start up levels in Norfolk are low but businesses have a higher rate of survival...

In 2019, 10% of all businesses in Norfolk were in their first year of start up. This is below both the East of England (12%) and England average (13%).

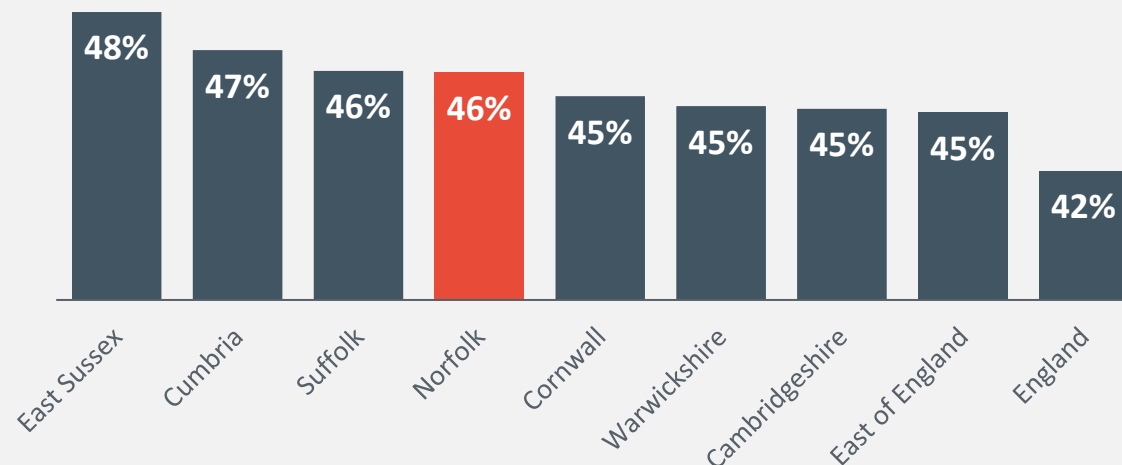
One year business survival rates in Norfolk (90%) are in line with the East of England (90%) and slightly higher than the average for England (89%).

Five year business survival rates are strong in Norfolk with 46% of businesses still operating after 5 years compared to 45% in the East of England and 42% in England.

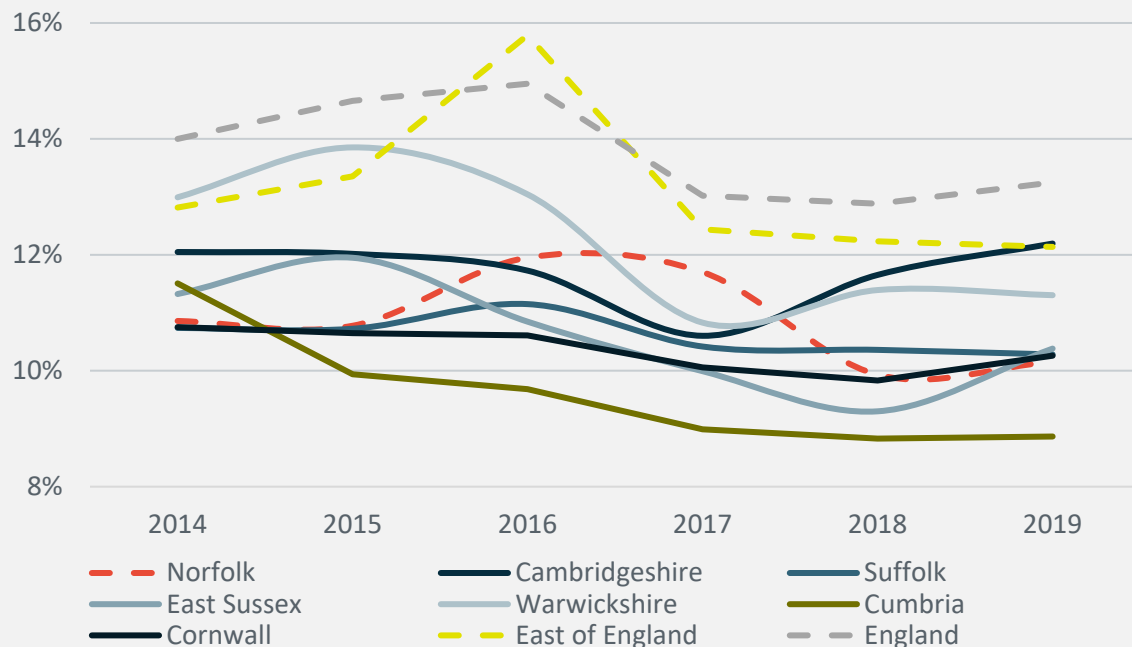
1-year business survival rates (businesses established in 2018)



5-year business survival rates (businesses established in 2014)



Start up rates as a proportion of the total business base, 2014-2019



Access to finance for SMEs

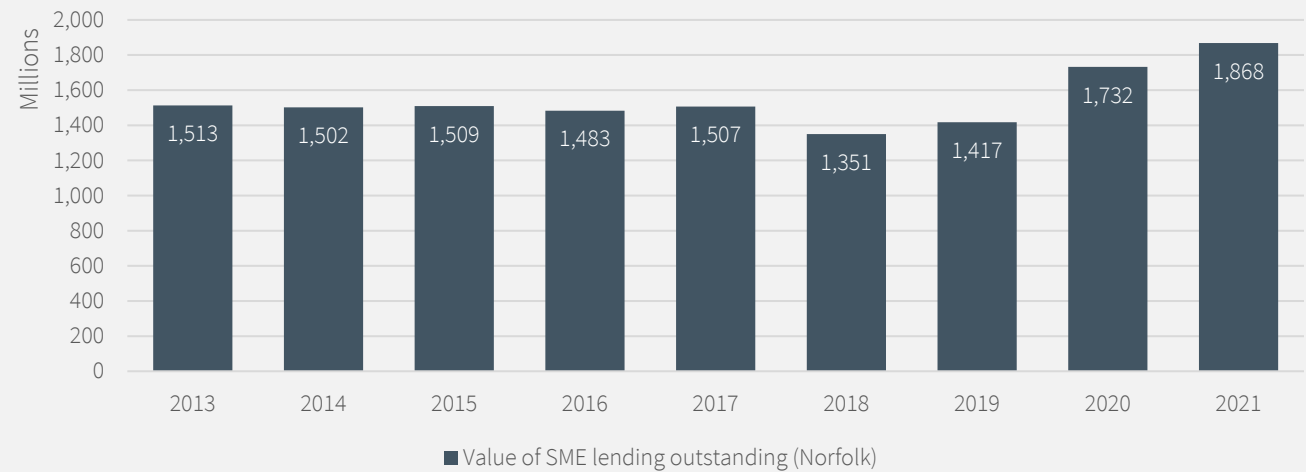
Grant / Funding	Amount Available + Dates	Details / conditions / requirements
Omicron Hospitality and Leisure Grant	Up to £6,000 20 th Dec 2021 – 31 st Jan 2022	Grants are available to hospitality, leisure and travel businesses (with fewer than 250 employees) that have been impacted by the introduction of plan B restrictions due to the omicron variant of Covid-19.
Supply Chain Innovation for Offshore Renewable Energy (SCORE)	40% of eligible costs, or £50,000 with a minimum grant of £2,500	Grants are available for SMEs across England to develop new products, processes and ideas in offshore renewable energy. 12 hours of subsidised business support to help grow and develop businesses within the offshore renewables sector are also available.
Internationalisation Fund	Match-funded grants of £1,000 - £9,000 Currently open (started Dec 2020)	Grants are available for English SMEs with up to 250 employees to use for future business activities, aimed at helping these businesses grow into new international markets. Funds can be used to support areas including (but not limited to) market research, IP advice, translation services, or international social media.
Small Grant Fund	£1,000 - £25,000 (20% of the total cost of the proposed project). Currently open	Designed to provide funding for UK based growing SMEs. Grants can help towards the purchase of significant capital items, IP costs, development of new products or services, consultancy support, and trade fairs.
Go Digital Funding Programme	£500 and free expert advice Currently open	Free digital business support available for small and medium sized businesses in Norfolk to learn how to better use digital tools to identify business opportunities and help grow businesses. A grant of up to £500 can be applied for to help implement a digital action plan.
BEE Anglia Energy Efficiency Grants	40% of total project cost (or up to £20,000) Currently open	Specialist advice and grants to support businesses in Norfolk and Suffolk to reduce their carbon footprint. Grants are available for any upgrade or improvement that achieves an adequate energy saving.
Business Growth Grant	£500-£10,000 15 th Oct 2021 – 31 st Jan 2022	Grants are available to Norwich-based MSMEs (with fewer than 250 employees) for projects which support business growth. The grants will provide funding of up to 50% of the cost of improvement projects such as premises refurbishment or improving IT like card payment facilities or WiFi.
Start-up Grants	£1,000 Currently open	Grants to support the start-up and development of new businesses that are less than six months old. The business must be based in the South Norfolk or Broadland District Council area and operate for a minimum of 16 hours per week.
Delivering Rural Investment for Vital Employment (DRIVE)	A grant between £5,000 and £30,000 (up to 40% of total project costs)	DRIVE provides local businesses with access to a capital grant to invest in new business development that leads to job creation.

Access to finance for SMEs (2)

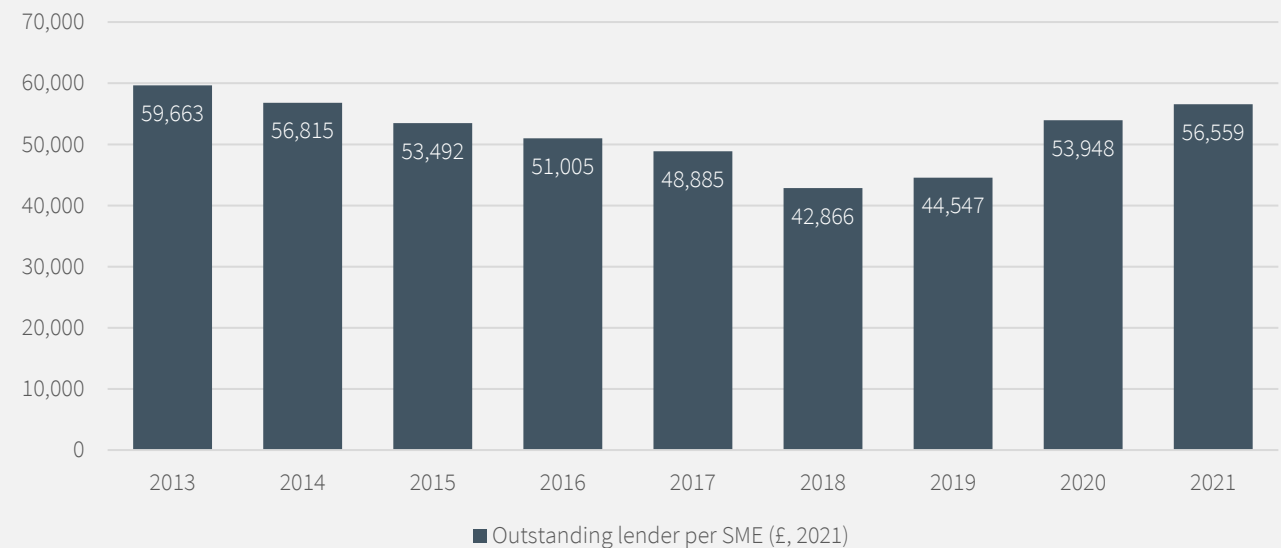
SME borrowing has accelerated since 2020 and the onset of the COVID19 pandemic...

- UK Finance data indicates the level of SME lending by postcode sector. This data covers all outstanding borrowing based on the primary trading location of the business and includes loans and overdrafts to businesses.
- The total value of borrowing will be driven by the size of the SME sector, the price level and the financial position of its constituent businesses. In cash terms, this remained relatively flat at approximately £1.5 billion between 2013 and 2017 before a 2018 dip.
- Outstanding lending to SMEs has accelerated since 2020 and the onset of the covid-19 pandemic and reached £1.8 billion in 2021.
- After adjusting for the growth in prices and the changing numbers of SME businesses in Norfolk indicates the average level of *real* outstanding borrowing per SME.
- In real terms, the level of borrowing per SME fell year on year from approximately £60,000 in 2013 to £43,000 in 2018. this jumped to £54,000 in 2020 and rose again to £56,600 in 2021.

Total outstanding lending to SMEs



Outstanding lending per SME (£, 2021 prices)

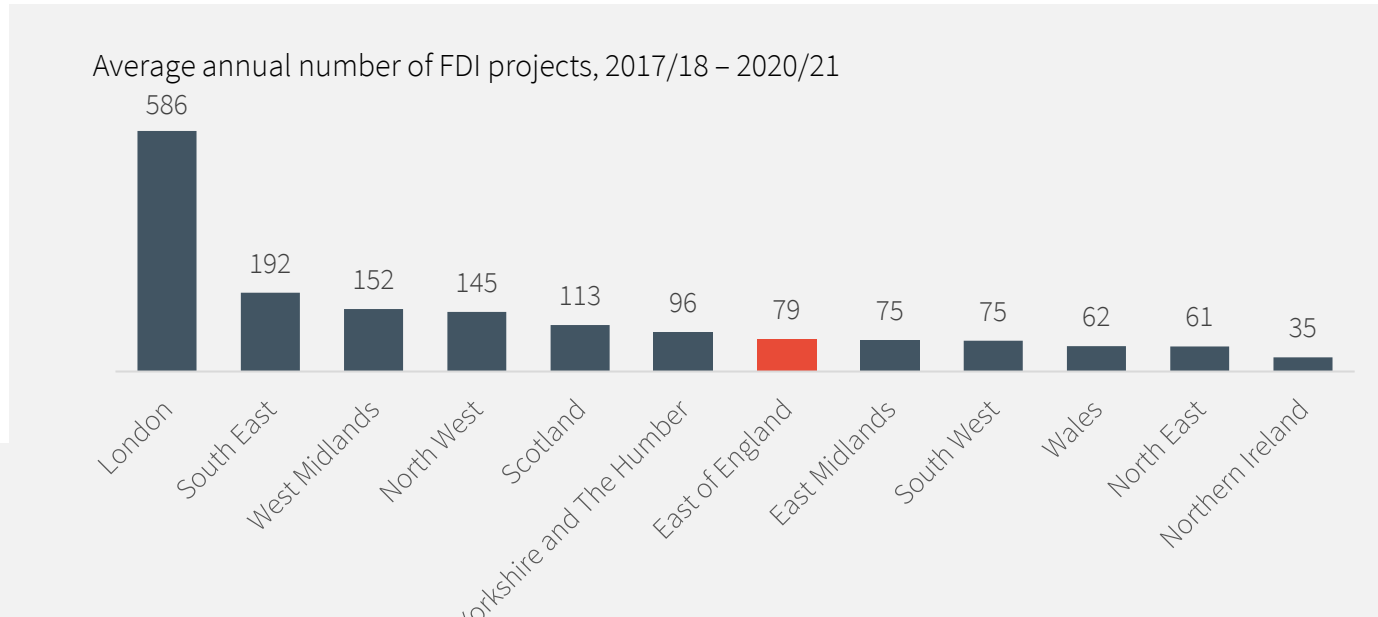


FDI and venture capital in Norfolk

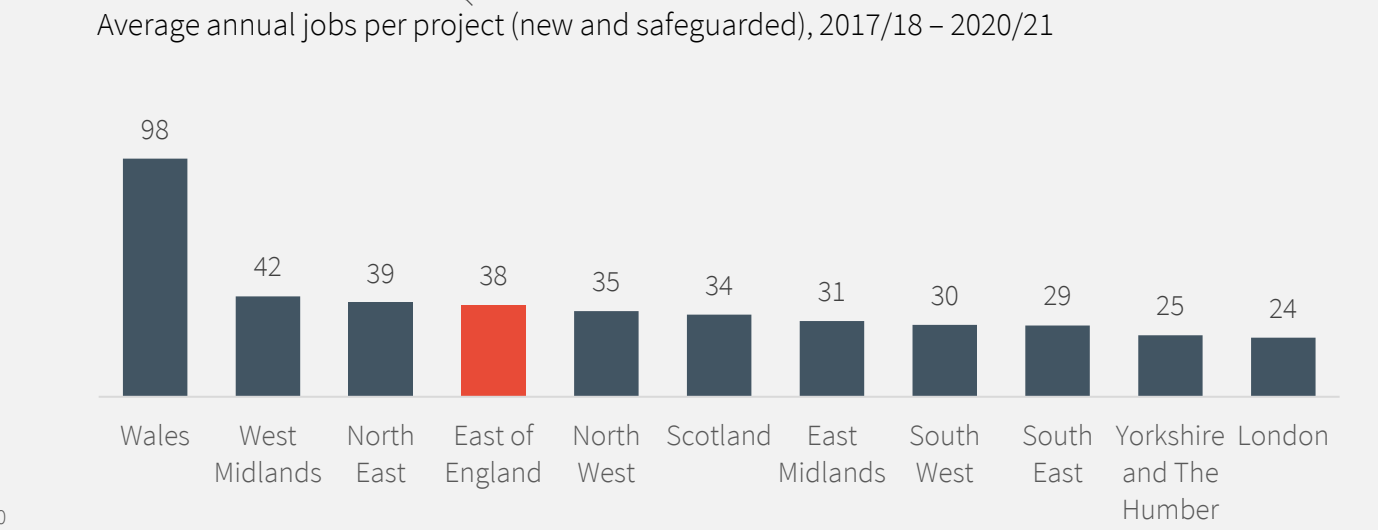
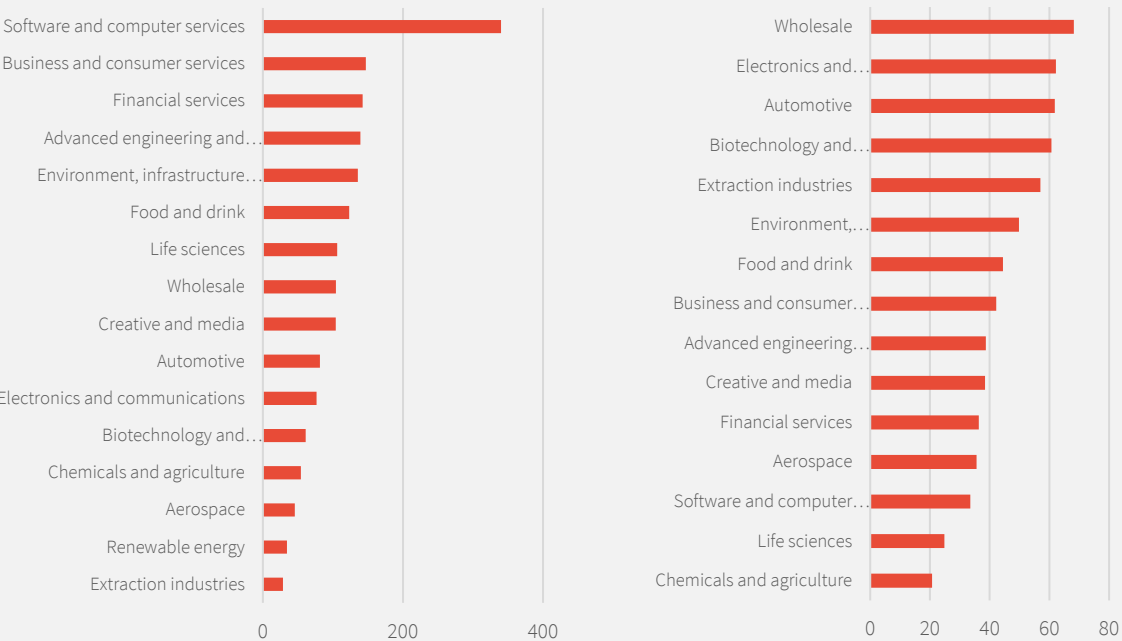
The East of England performs well for average jobs created and safeguarded by each FDI project...

An average of 79 foreign direct investment (FDI) projects were created in the East of England each year between 2017 and 2021. For every FDI project in the East of England, an average of 38 jobs were created between 2017/18 and 2020/21. This is broadly in line with the UK average (39 jobs per project) and outperforms many regional comparators including London (24) and the South West (30).

FDI jobs data by sector is only available at the UK level. This data suggests that the largest share of projects by sector have in software and computer services, business and consumer services and financial services. Sectors creating and safeguarding the largest number of jobs per project are wholesale, electronics and communications and automotive.



Average number of projects by sector (UK) Average number of jobs by sector (UK)



Source: ONS, Country and Regional Breakdown of Expenditure on R&D in the UK by sector of performance (2021). Note: averages refer to the period 2017/18 to 2020/21.

Norfolk's trade activity

Norfolk's trade activity reflects its regional economic specialisms...

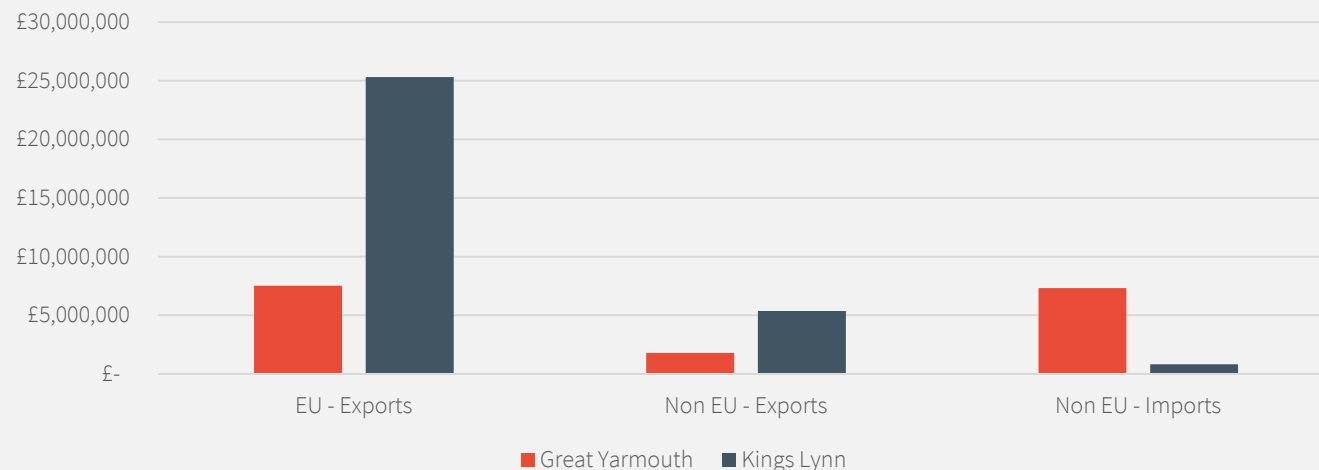
In 2020, the East of England was home to more than 116,000 exporting businesses. 57% of total exporting businesses in the East of England exported to countries in the EU which is slightly lower than the average for the United Kingdom (59%).

The most granular level data on trade activity is available at the port level. In 2021, Great Yarmouth exported £9.3m worth of goods in 2021 whilst King's Lynn exported £30.7m. Exports to the EU accounted for 81% of goods by value at Great Yarmouth and 83% at King's Lynn.

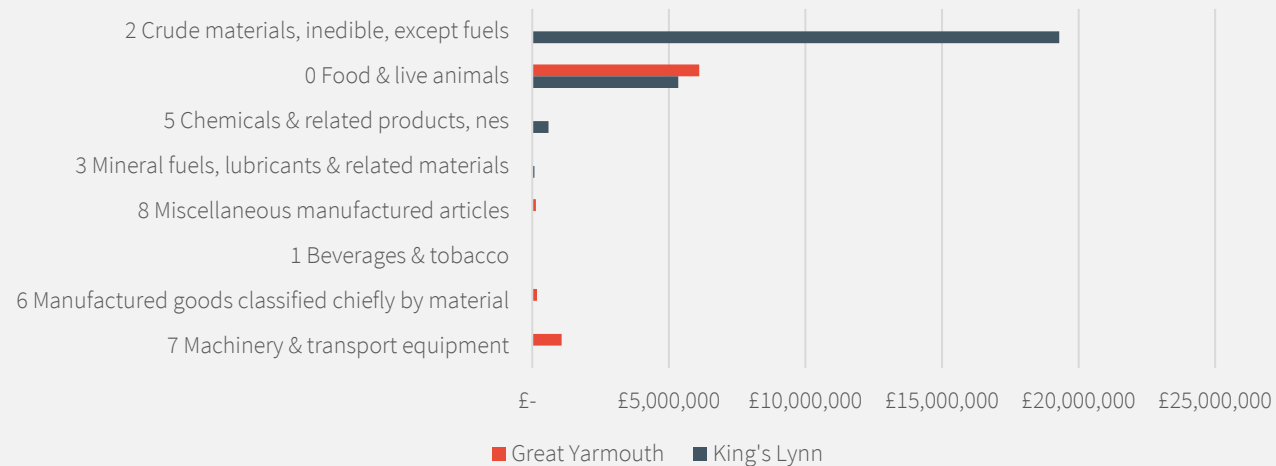
Breakdown by sector shows that the majority of goods exported at King's Lynn were crude materials (inedible, except fuels) which totalled £19.3m in value followed by food & live animals (£5.3m). At Great Yarmouth, the most significant export categories included food & live animals (£6.1m) and machinery & transport equipment (£1.1m).

In 2021, non-EU imports to Great Yarmouth totalled £7.3m worth of goods whilst King's Lynn imported £0.8m in goods.

Trade activity by port, 2021



EU Exports by Sector, 2021



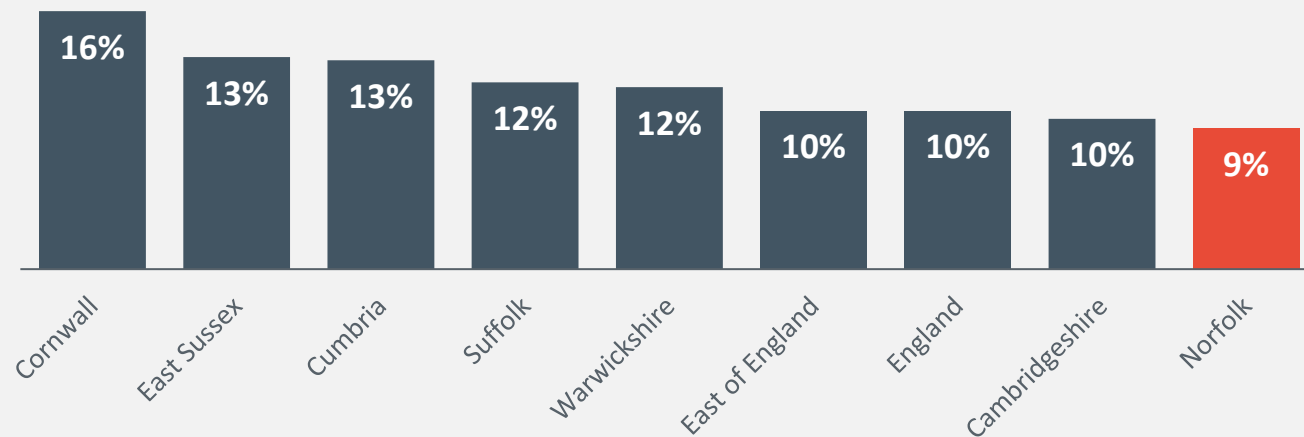
Self-employment across Norfolk

Self-employment in Norfolk is low but with significant variations across the county...

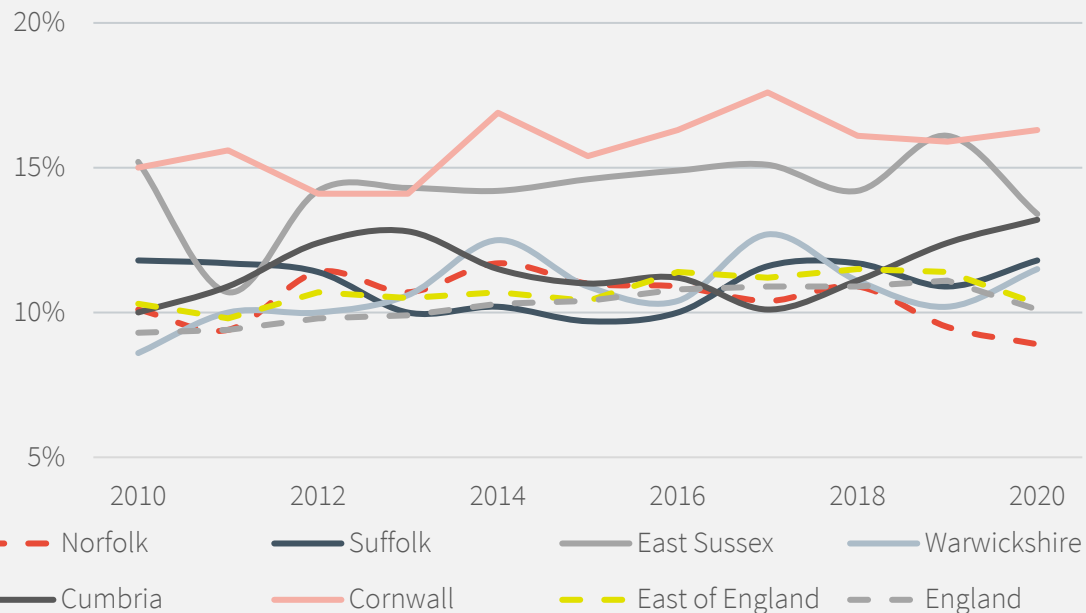
9% of working age residents (aged 16-64) in Norfolk are self-employed which is slightly lower than the East of England (10%) and England (10%).

Levels of self-employment vary significantly across Norfolk. The highest levels of self-employment are seen in North Norfolk (17%) whilst the lowest levels are seen in Norwich (5%).

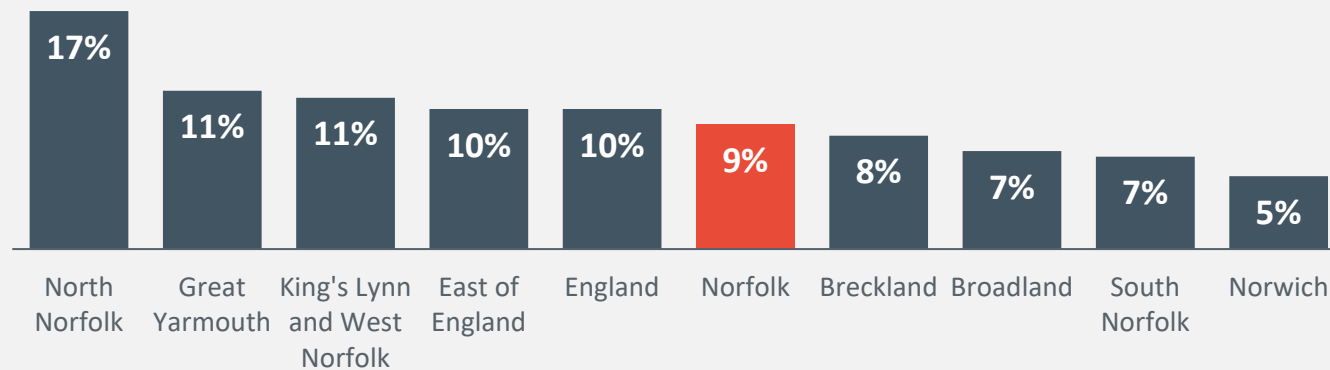
Percentage aged 16-64 who are self employed, 2020



Percentage aged 16-64 who are self employed, 2010-2020



Percentage aged 16-64 who are self employed, 2020



Source: ONS, Annual Population Survey (2020). * No difference in area type between dashed and solid lines.

Sole proprietors across Norfolk

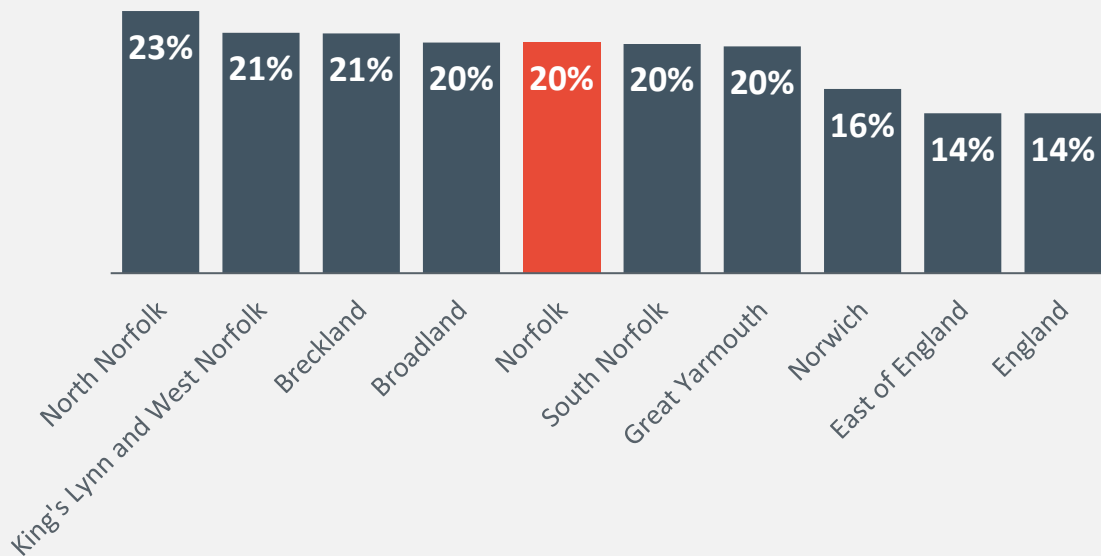
High levels of sole proprietor businesses in Norfolk...

Sole proprietor businesses can be used as an indicator for the level of entrepreneurship in a local economy. In Norfolk, sole proprietor businesses account for 20% of the business base. This is notably higher than the average for the East of England (14%) and England (14%).

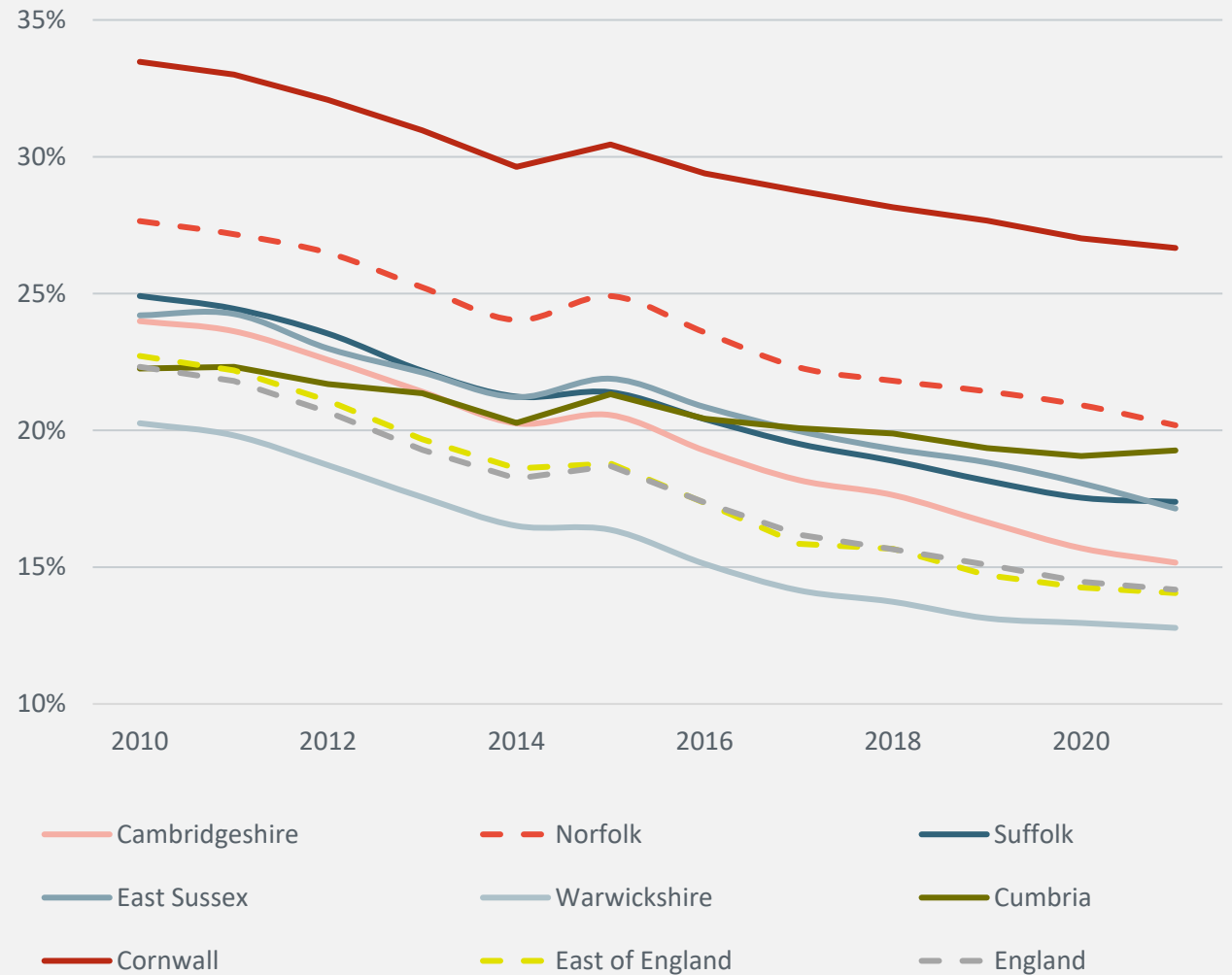
Levels of sole proprietor ownership have fallen in all areas over the past decade. In Norfolk, sole proprietor ownership has fallen from 28% in 2010 to 20% in 2021.

Within the county sole proprietor ownership as a proportion of the business base is higher than both the East of England and England averages in all districts. The level of sole proprietor ownership is greatest in North Norfolk (23%) and lowest in Norwich (16%).

Sole proprietors as a proportion of the business base, 2021



Sole proprietors as a proportion of the business base, 2021



* No difference in area type between dashed and solid lines.

COVID-19 impact: economic output

Norfolk's Gross Value Added reduced by an estimated 11% due to the impacts of COVID-19...

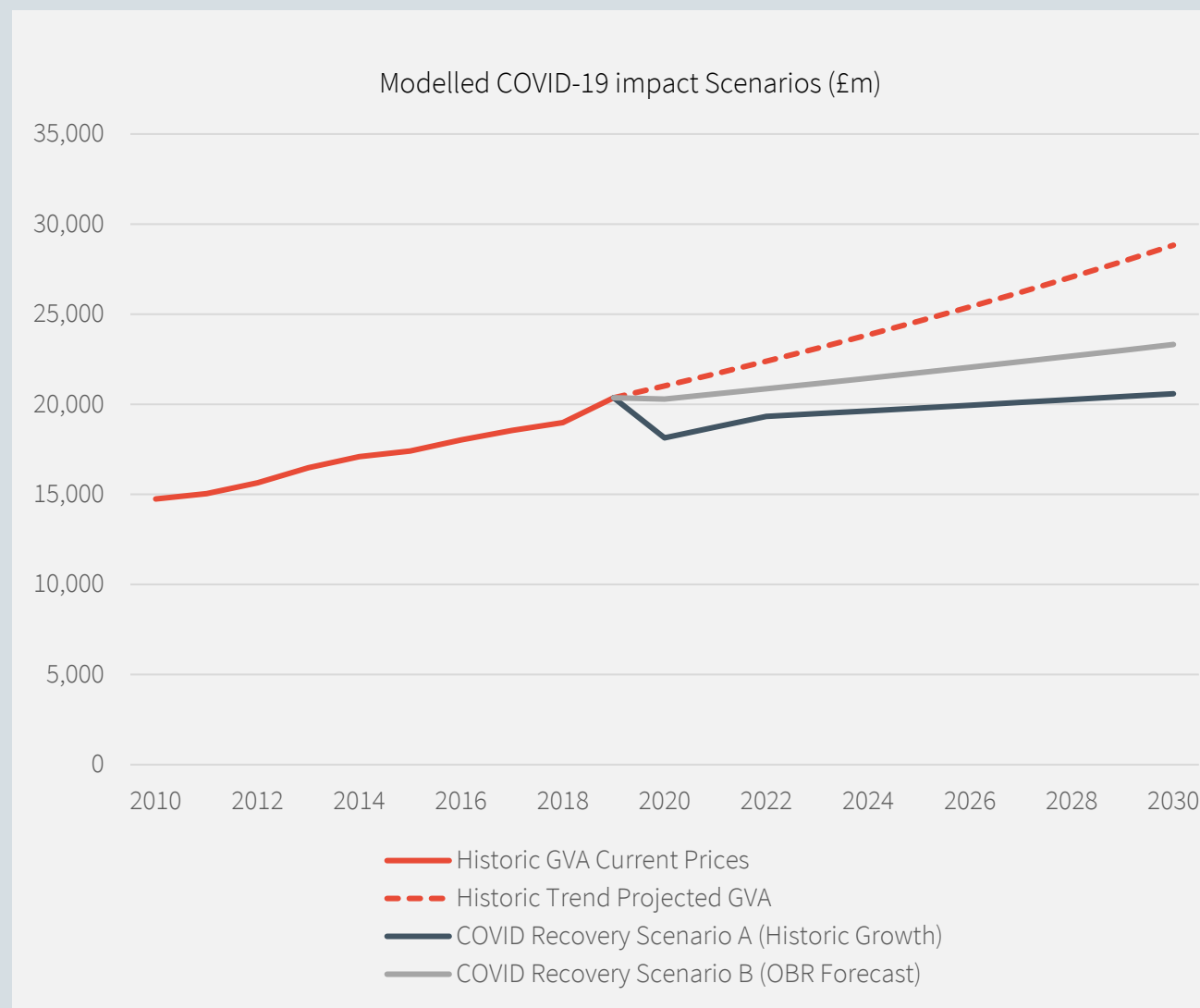
The latest Office for Budget Responsibility (OBR) sectoral impact estimates have been used to calculate the impacts of COVID-19 on Norfolk's economy.

It is estimated that Norfolk's Gross Value Added (GVA) was £20.4bn in 2019 and that there was a £2.2bn, or 11%, drop during 2020 which is slightly higher than for the national economy.

The chart on the right shows two scenarios for recovery in Norfolk:

- **Scenario A** is based on a historic 3.2% real growth rate per annum going forward.
- **Scenario B** is based on OBR's March 2021 growth forecast for the national economy. The OBR forecasts growth to be about 4% in 2021, 7% in 2022 and then around 1.7% thereafter.

As the graph illustrates, Norfolk needs to achieve a growth rate well above its historic rate to get back to its pre-COVID trajectory over the next decade.



COVID-19 impact: **economic output**

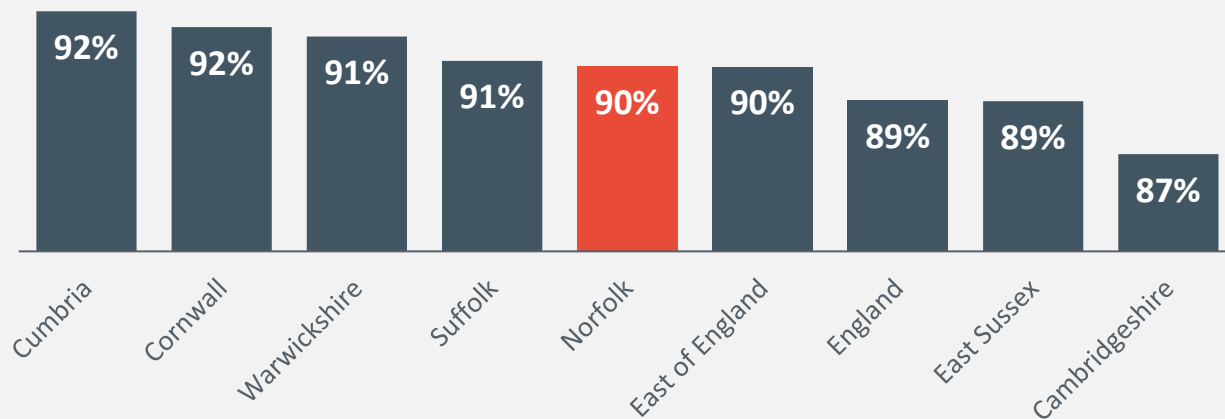
Losses were greatest for the sectors most affected by social distancing and lockdown restrictions...

The latest Office for Budget Responsibility (OBR) sectoral impact estimates have been used to calculate the impacts of COVID-19 on Norfolk's economy.

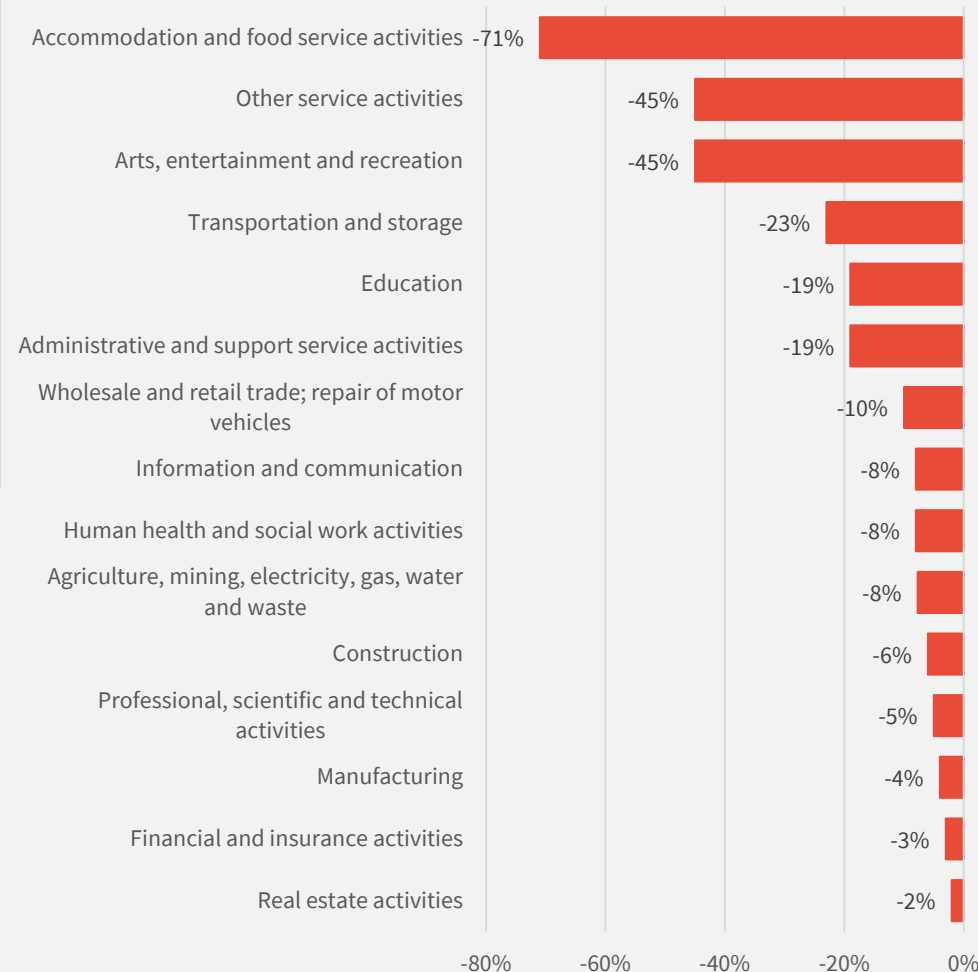
Applying the OBR Reference Scenario to Norfolk's individual sectors shows that Accommodation and Food Services was the worst hit sector in 2020. In 2020, the sector is modelled to have experienced an absolute loss of £536m, followed by Education (£273m) and Wholesale and Retail (£236m). This reflects the significant contribution these sectors make to Norfolk's GVA. Conversely, Public administration and defence experienced an absolute gain of £23m over this same period while other sectors experienced only small absolute losses in 2020 including Information and communication (£37m) and Financial and insurance activities (£38m).

Norfolk performs well in terms of short-term business survival rates. For businesses established in 2018, 90% were still operating one year later.

1-year business survival rates (est. 2018)



Norfolk estimated GVA loss in 2020 by sector (£m), 2020



COVID-19 impact: **businesses**

Businesses have been particularly susceptible to closures during lockdown restrictions...

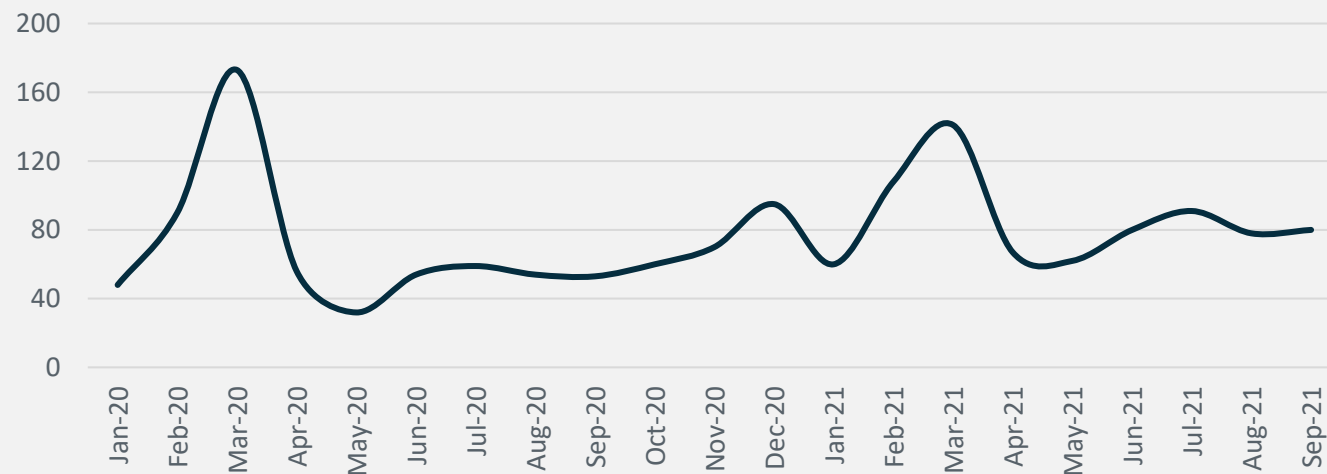
The Business Impact of Coronavirus (COVID-19) Survey (BICS) provides the most up to date picture of business impacts at the regional level. Applying these monthly results to Norfolk's economy allows estimation of the impacts of COVID-19 on the local economy.

Around 1,024 businesses in Norfolk were estimated to have paused or temporarily ceased trading in July 2020. The most affected sectors by number of businesses temporarily closed included wholesale (210), construction (206) and administrative and support services (196).

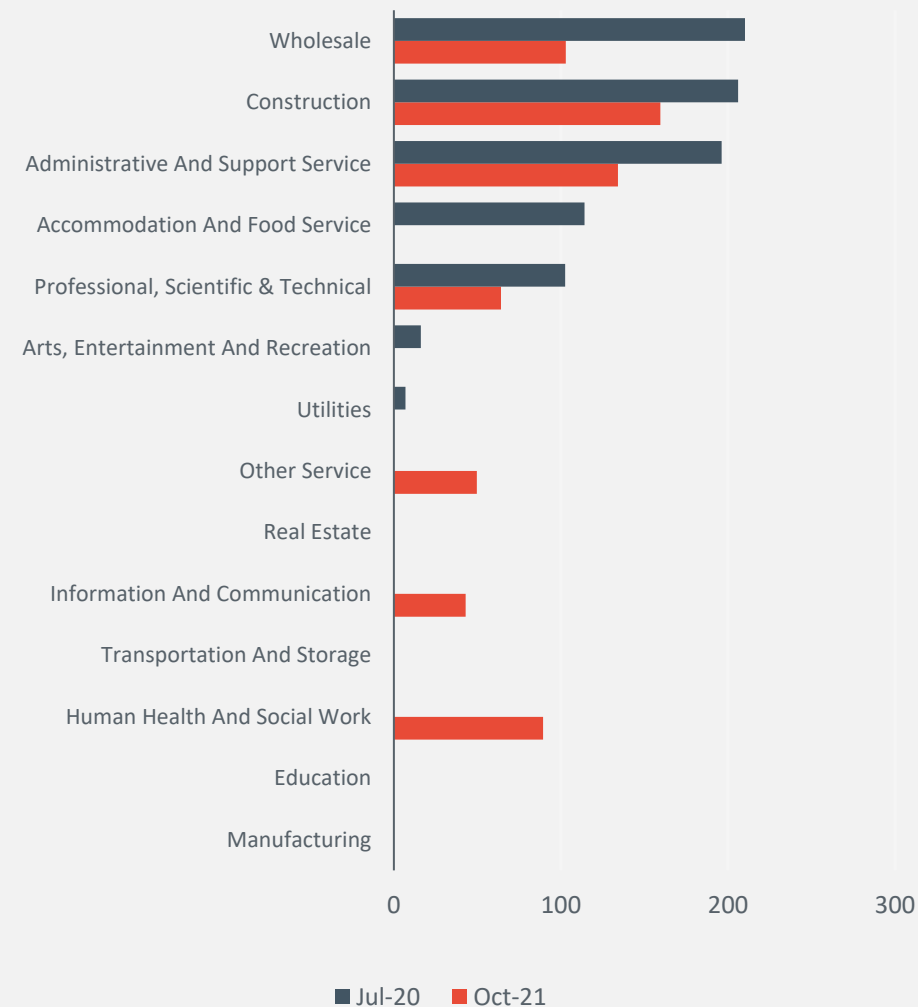
The most recent data from BICS is October 2021. From this data it can be estimated that as of October 2021, around 100 businesses are paused or temporarily closed.

Business insolvencies peaked at 173 in March 2020 followed by 141 in March 2021.

Business insolvencies in the East of England, January 2020 – September 2021



Number of businesses that have stopped trading by sector, July 2020 – October 2021



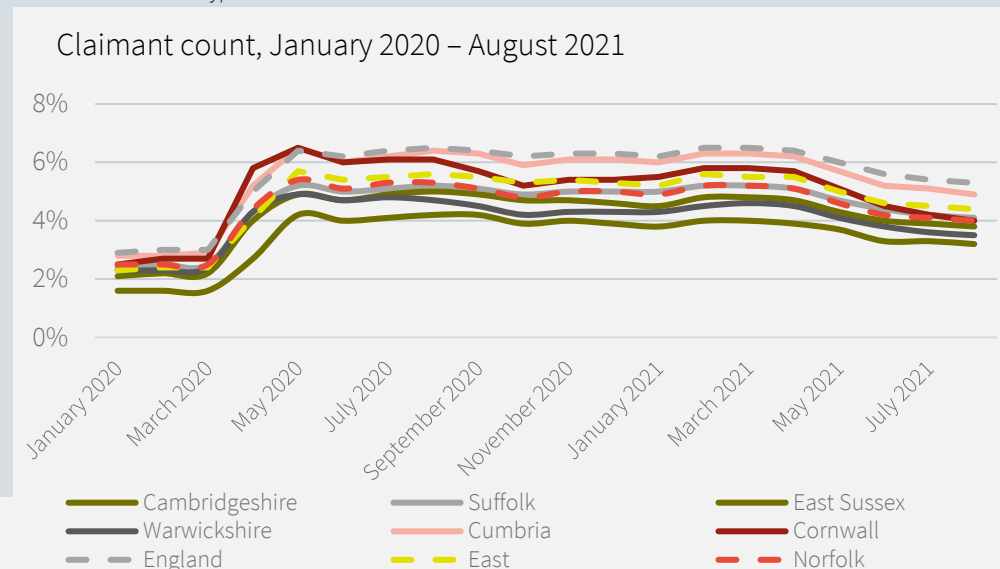
COVID-19 impact: employment

Claimant levels increased significantly during the pandemic exacerbating existing challenges in employment...

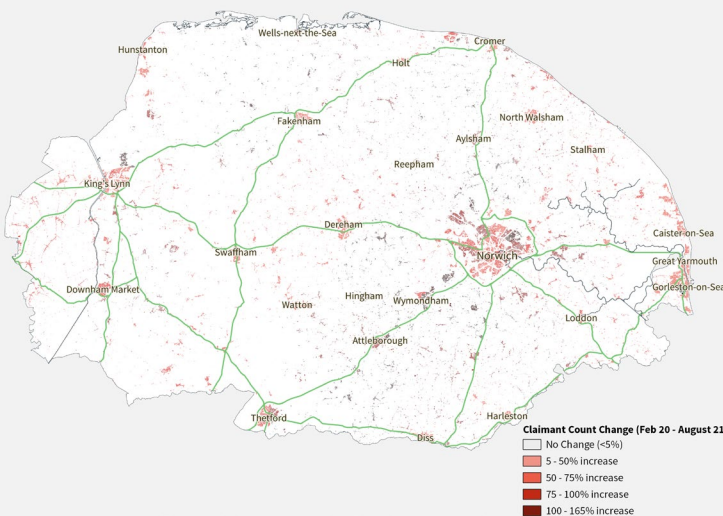
The Claimant Count is a measure of the number of people claiming benefits principally for the reason of being unemployed, based on administrative data from the benefits system. The Claimant Count does not attempt to measure unemployment, which is a concept defined by the International Labour Organisation (ILO) as all those who are out of work, actively seeking work and available to start work. Therefore, Claimant Count data also captures challenges such as underemployment.

As of August 2021, there were an additional 8,100 claimants in Norfolk compared to January 2020 equivalent to a 61% increase in claimants over this period. This is lower than the proportional increase seen in both the East of England (94%) and England (+85%) and of all comparators with the exception of Cumbria (+50%).

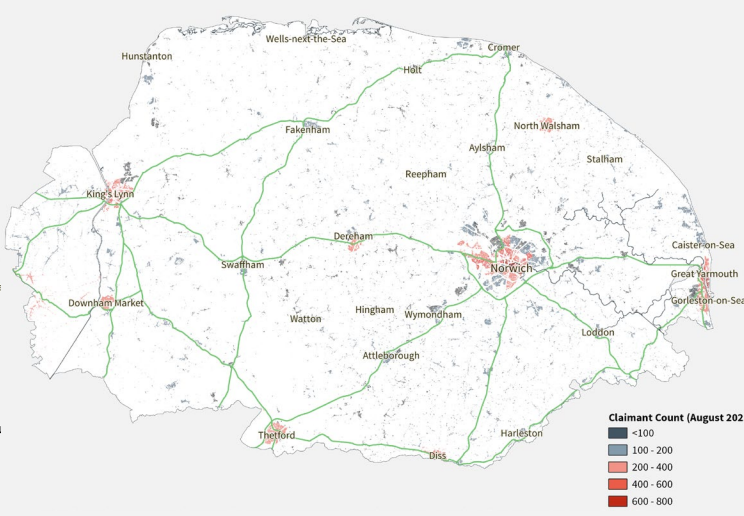
*No difference in area type between dashed and solid lines.



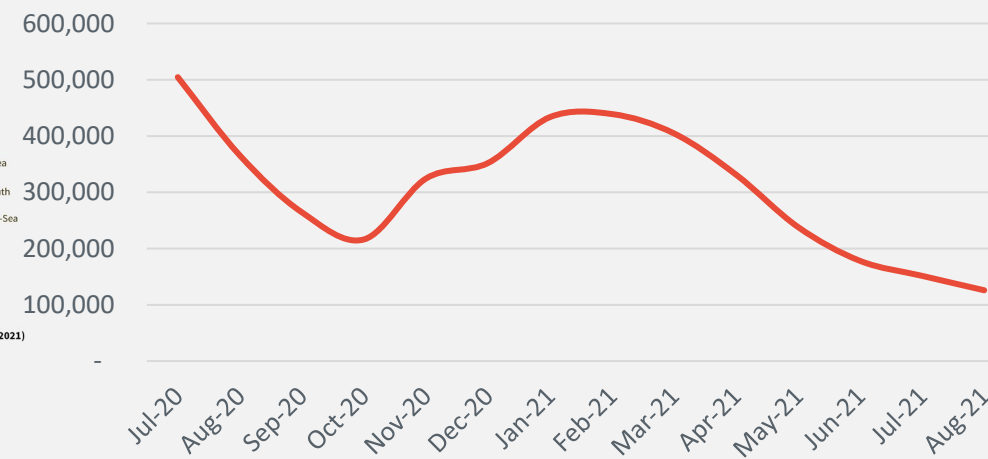
Claimant Count Change February 2020 to August 2021



Claimant Count August 2021



Redundancies in the East of England, July 2020 – August 2021



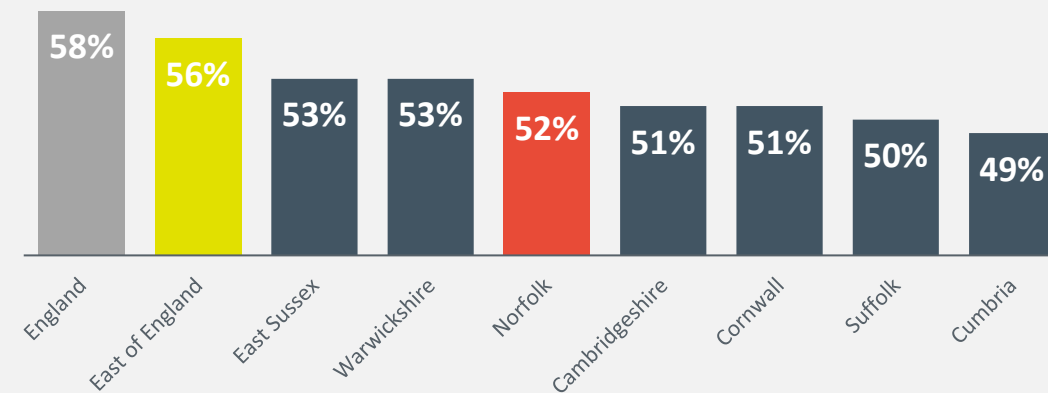
COVID-19 impact: local economy

Norfolk's businesses were reliant on financial support throughout the pandemic, although self-employed residents were less dependent than other areas...

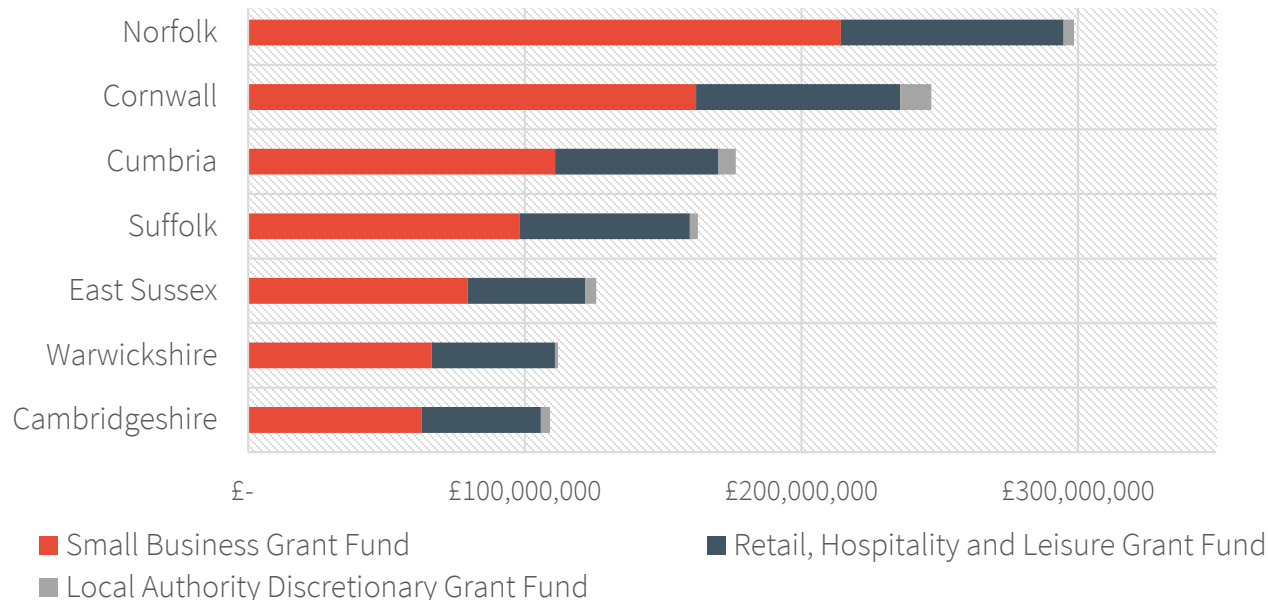
For the period from March 2020 to June 2021 Self Employed Income Support Scheme (SEISS) claims total value £70 million in Norfolk representing 25,300 claimants or a 52% take-up rate amongst those eligible. This take-up rate is lower than both the East of England (56%) and England (58%) level.

Around 20,900 businesses in Norfolk received a combined total of £299 million in business grants of which 72% were Small Business Grant Fund allocations, 27% were Retail, Hospitality and Leisure Grant Fund and 1% were the Local Authority Discretionary Grant Fund. Within Norfolk, North Norfolk received the largest total value of claims (£53 million) followed by King's Lynn and West Norfolk (£38 million) and West Norfolk (£38 million) and Norwich (£38 million).

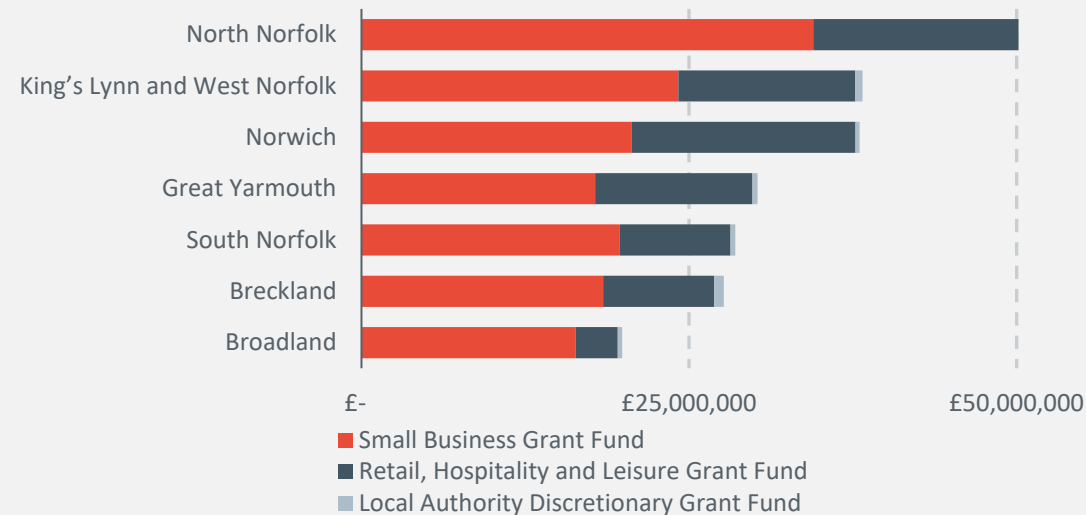
SEISS take-up rate made to 06/06/21 (£m)



Total value of claims, as of July 2020



Total value of claims, as of July 2020



1.4

Norfolk's People



HATCH

People: Evidence Summary

A growing population



Population has increased by **+21%** since 1991 (vs 18% nationally) and is expected to grow by another **+14%** by 2043

An ageing population



25% of people are aged 65+ (vs 19% nationally) with future population growth expected to be highest among this age group

A low-skilled population



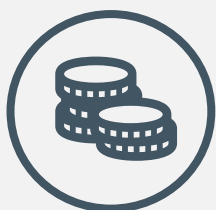
Only **35%** of the population has an NVQ4+ qualification (vs 43% nationally) and **7%** have no qualifications at all

An economically active population



81% of working age people are employed or looking for work (vs 79% nationally) but the unemployment rate (6%) is just above the national average

A lower wage population



Median resident earnings are **£28,571** and median workplace earnings are **£28,421** (vs £32,944 and £31,044 across the East of England)

A population with deprivation challenges



14% of neighbourhoods are within the 20% most deprived in the country. But major pockets of deprivation are found in Great Yarmouth, Norwich, King's Lynn, Thetford and some rural areas

A relatively homogeneous population



93% of residents were born in the UK vs 86% at the national level, with other people being born in Europe (5%), the Middle East and Asia (2%), Africa (1%), and the Americas (1%)

A relatively healthy population



Life expectancy is above the national average but lower than regional comparators. People generally report positively on their 'Life Satisfaction' and 'Happiness'



Norfolk's population (1)

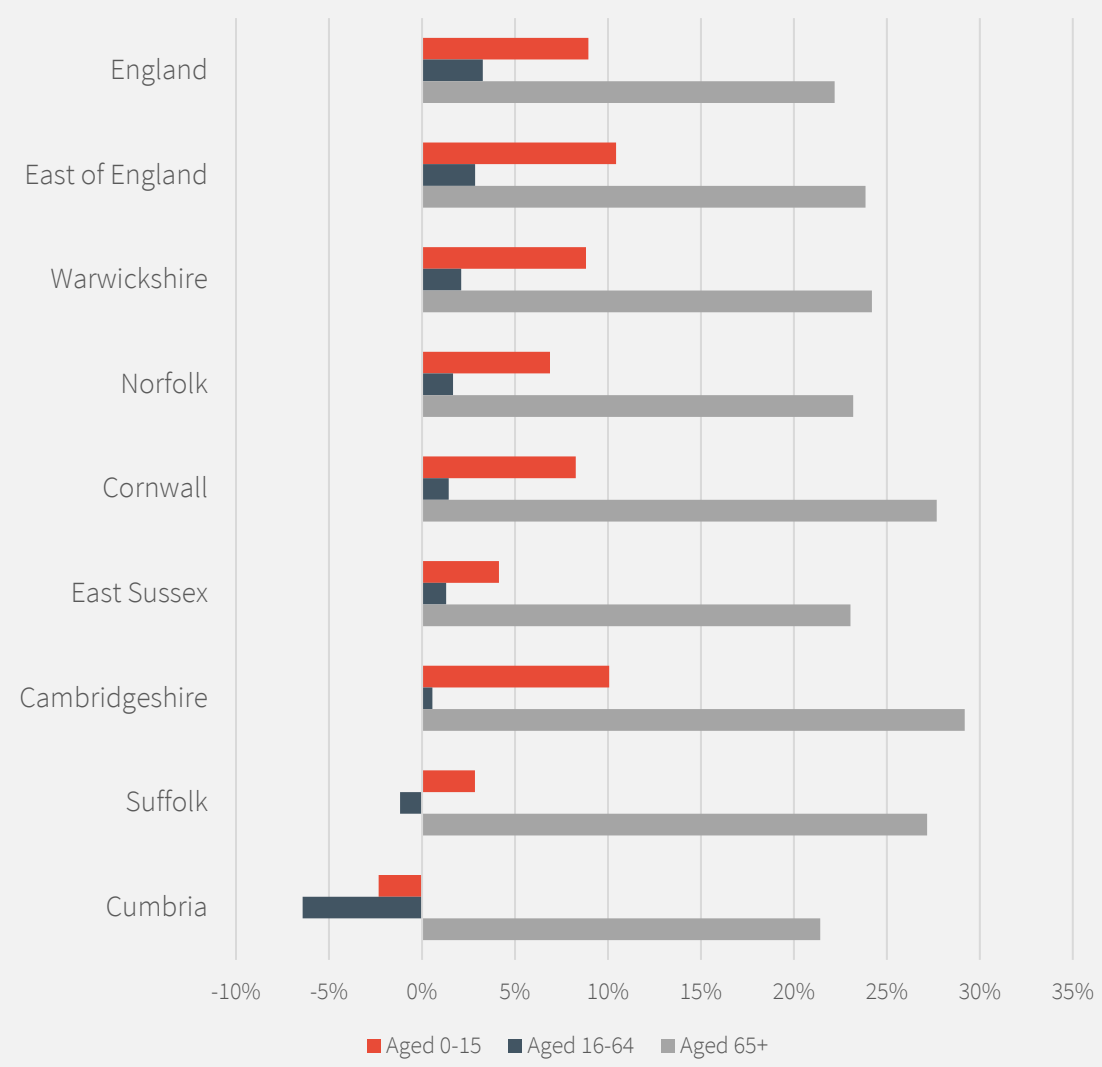
Norfolk has experienced a higher population growth rate than the national average rate ...

Norfolk is home to 914,000 people. Its population has increased by 21% since 1991, compared to 22% for the East of England and 18% nationally. This is equivalent to 160,000 net additional residents in Norfolk.

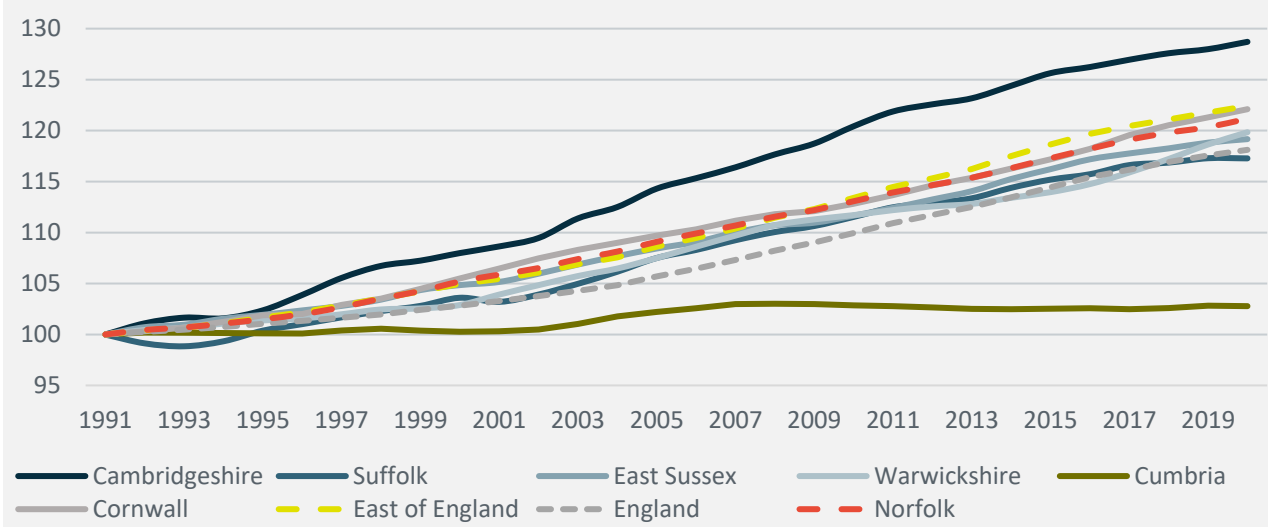
Norfolk's population growth has been concentrated in older age groups (aged 65+), with this cohort growing by 23% in the last decade. This compares to 24% in the East of England and 22% nationally.

Norfolk's working age population (aged 16-64) has grown at slower rates than comparators. Over the last decade, the population aged 16-64 grew by 2% in Norfolk compared to 3% in East of England and 3% for England.

Population change by age group, 2010-2020



Population growth, 1991-2019 (Index 100=1991)



Source: Population estimates - local authority based by single year of age, ONS (2019) *No difference in area type between dashed and solid lines.



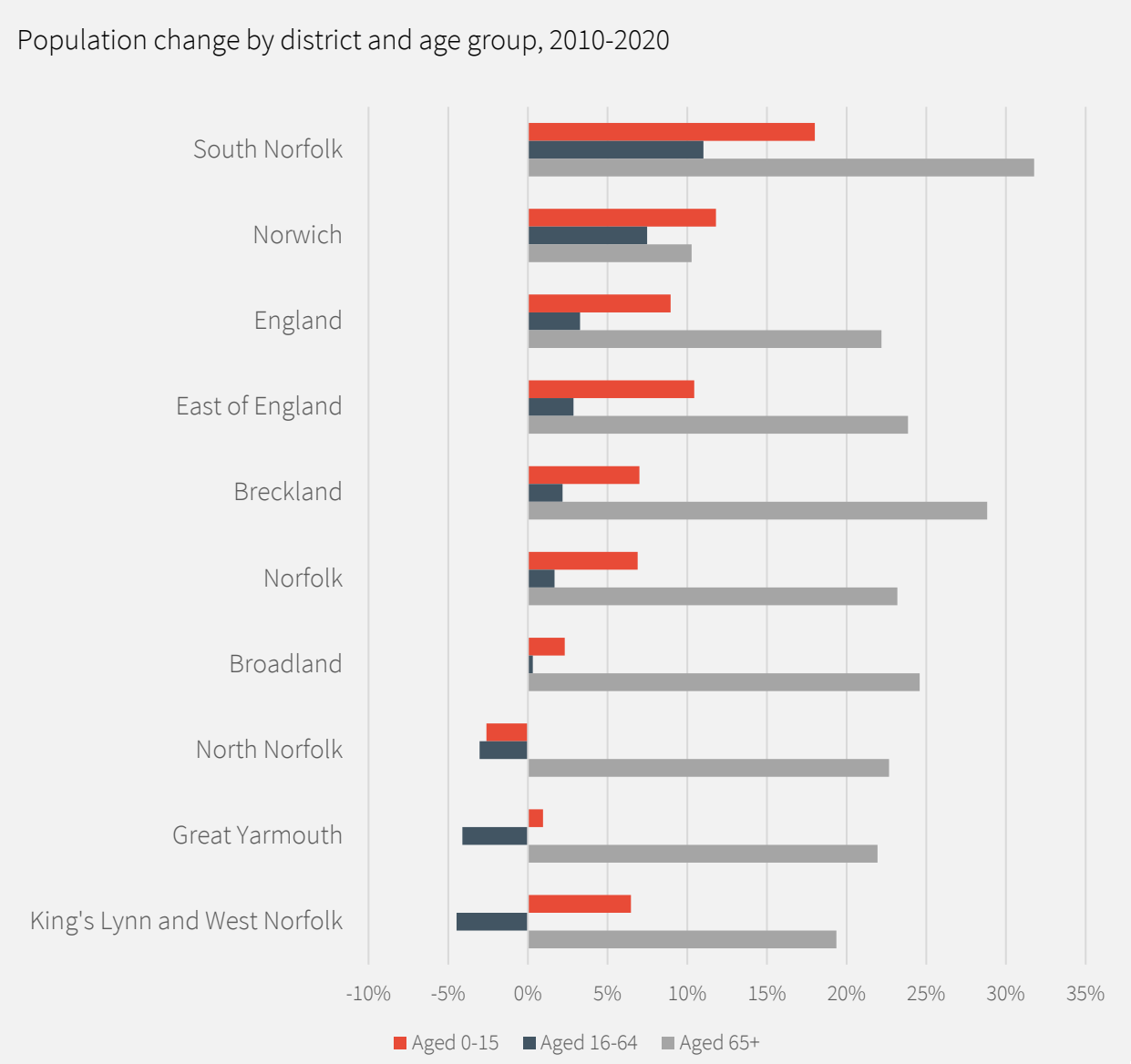
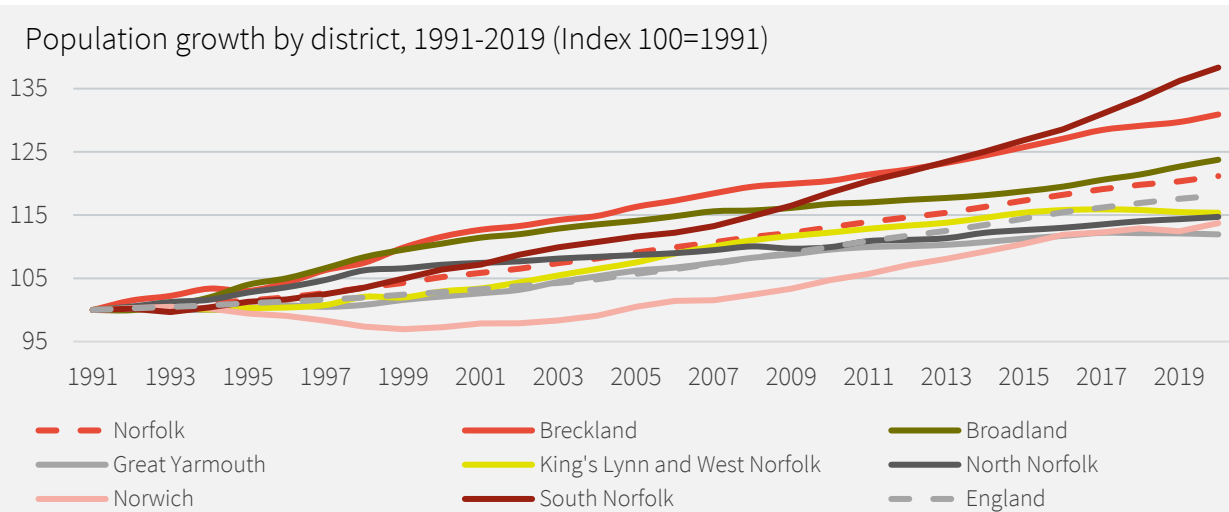
Norfolk's population (2)

Norfolk's population growth has been concentrated in its rural districts...

Norfolk's more rural districts have experienced the greatest population growth since 1991. The highest rates of overall growth have occurred in South Norfolk (38%), Breckland (30%) and Broadland (24%) which are all higher than the average for Norfolk (21%), East of England (22%) and England (18%).

Norfolk's population growth since 1991 has been driven by an increase in the population aged 65+ in all districts. The districts with the highest growth in the population aged 65+ include South Norfolk (32%), Breckland (29%) and Broadland (25%).

The change in the working age population (aged 16-64) has been highest in South Norfolk (11%) and Norwich (7%) which are both higher than the levels seen in Norfolk (2%), East of England (3%) and England (3%). Conversely, King's Lynn and West Norfolk (-4%), Great Yarmouth (-4%) and North Norfolk (-3%) have all seen decline in their working age populations.



Source: Population estimates - local authority based by single year of age, ONS (2019) *No difference in area type between dashed and solid lines.



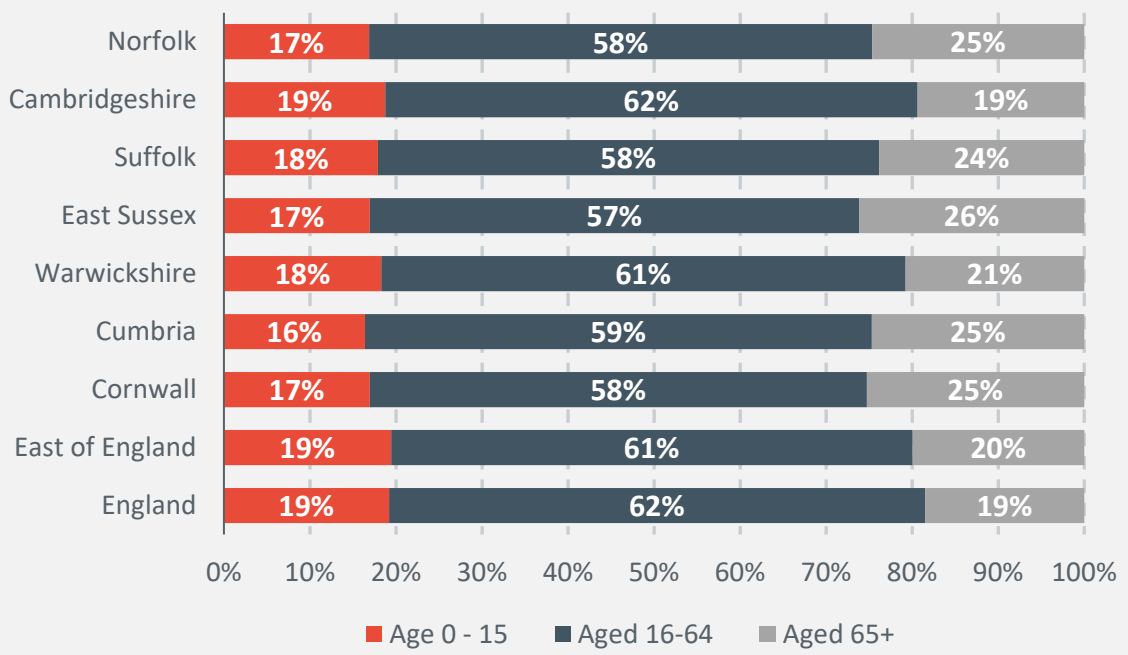
Norfolk's population profile (1)

Norfolk is home to an older population...

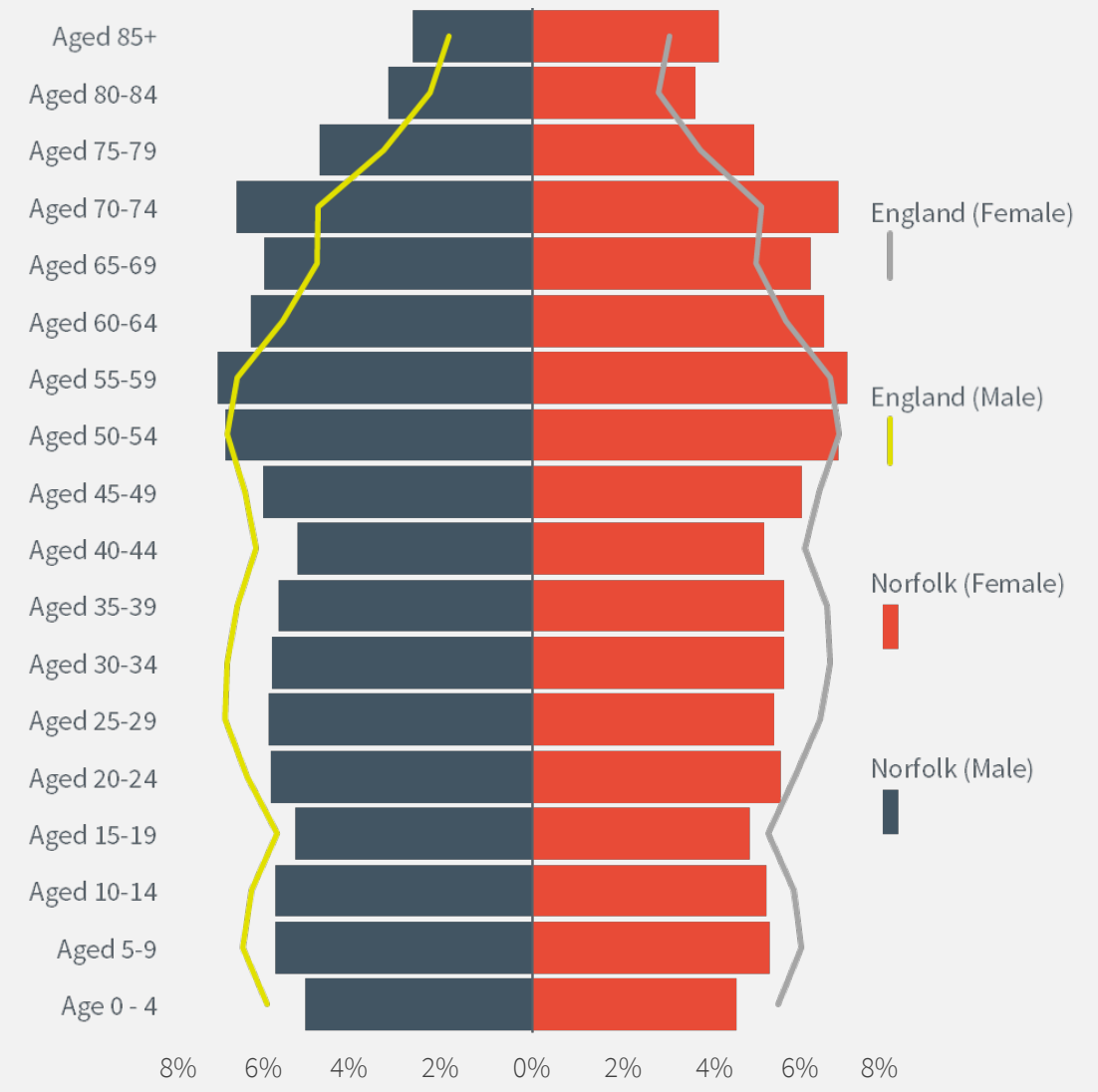
Norfolk's working age population (aged 16-64) accounts for 58% of the total population which is lower than either the East of England (61%) or England (62%).

The population aged 65+, in contrast, accounts for 25% of Norfolk's total population which is higher than both East of England (20%) and England (19%) figures.

Total population, 2020



Norfolk's population structure, 2020



Source: ONS, Population estimates - local authority based by single year of age (2019).



Norfolk's population profile (2)

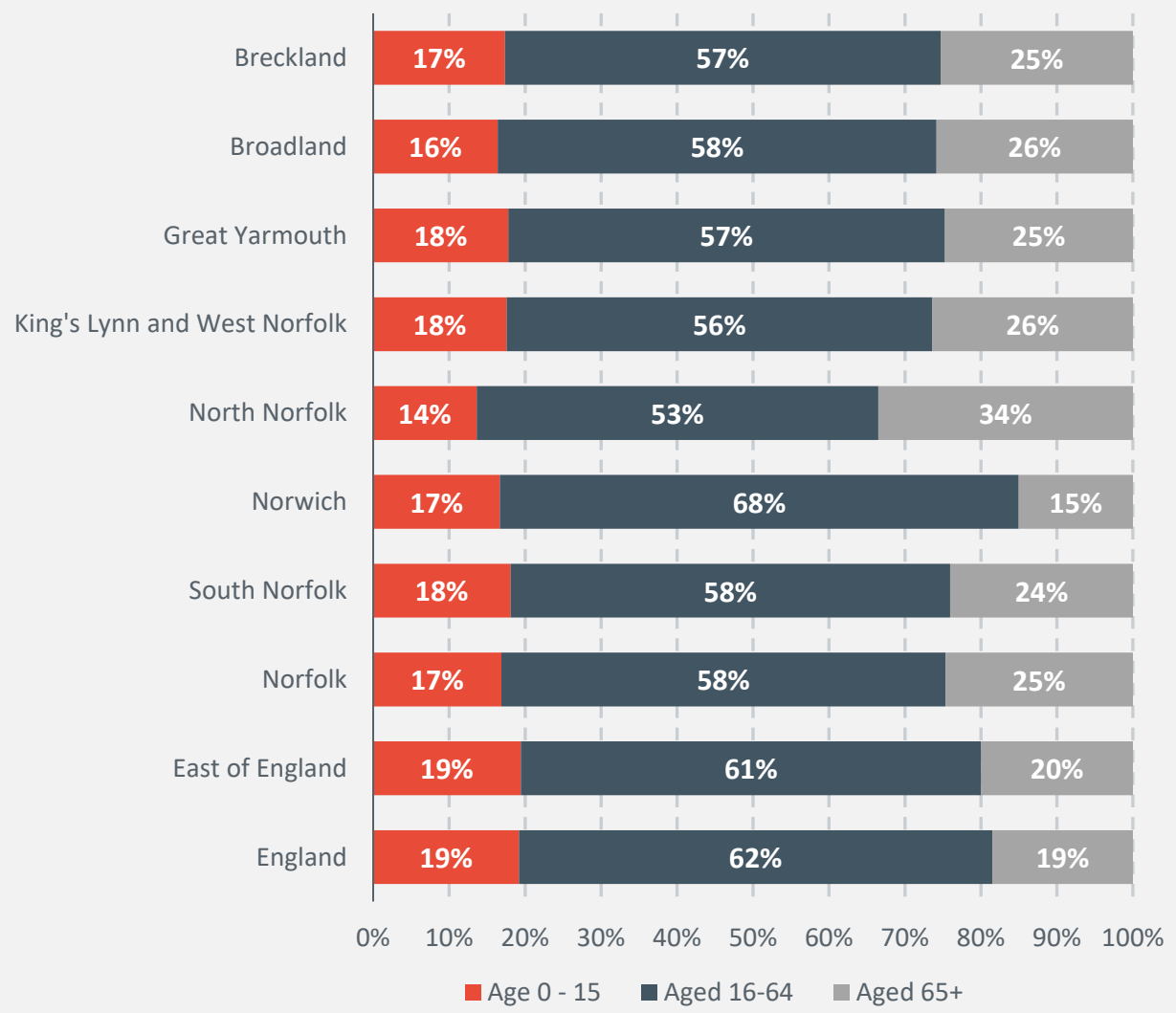
Norwich is a hub for Norfolk's working age residents...

King's Lynn and West Norfolk has the largest population in Norfolk (151,200 people) followed by South Norfolk (143,000) and Norwich (142,200).

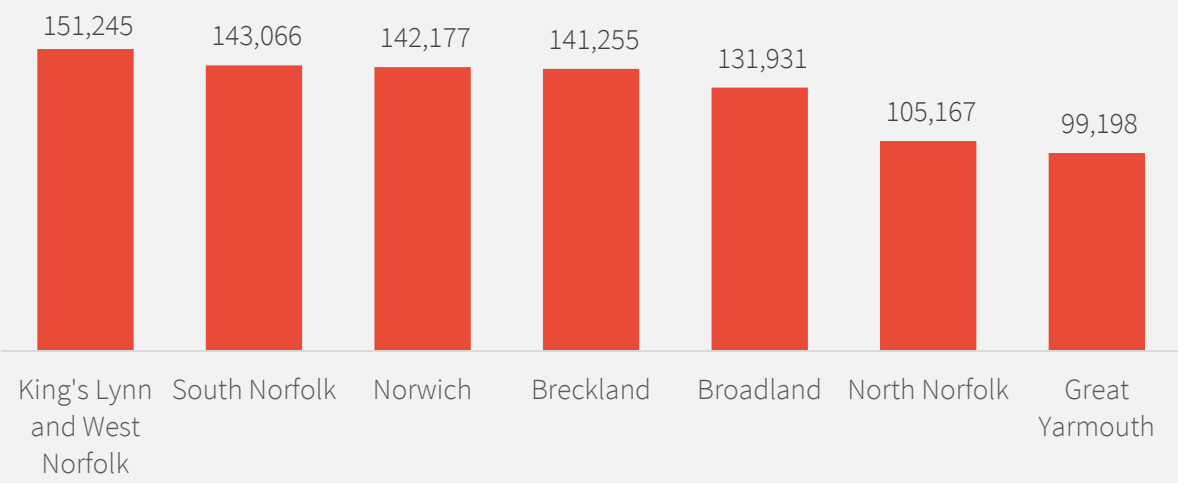
The working age population (aged 16-64) accounts for 68% of the total population in Norwich which is notably higher than the averages in Norfolk (58%), the East of England (61%) and England (62%). At the other end of the scale, the population aged 65+ represents the largest share of residents in North Norfolk (34%) compared to 25%, 20% and 19% at the Norfolk, East of England and England.

The population aged 0 to 15 is greatest in Great Yarmouth (18%), King's Lynn and West Norfolk (18%) and South Norfolk (18%). This is slightly above the average for Norfolk (17%) but lower than averages for both the East of England (19%) and England (19%).

Population by age group, 2020



Total population, 2020



Source: ONS, Population estimates - local authority based by single year of age (2019).

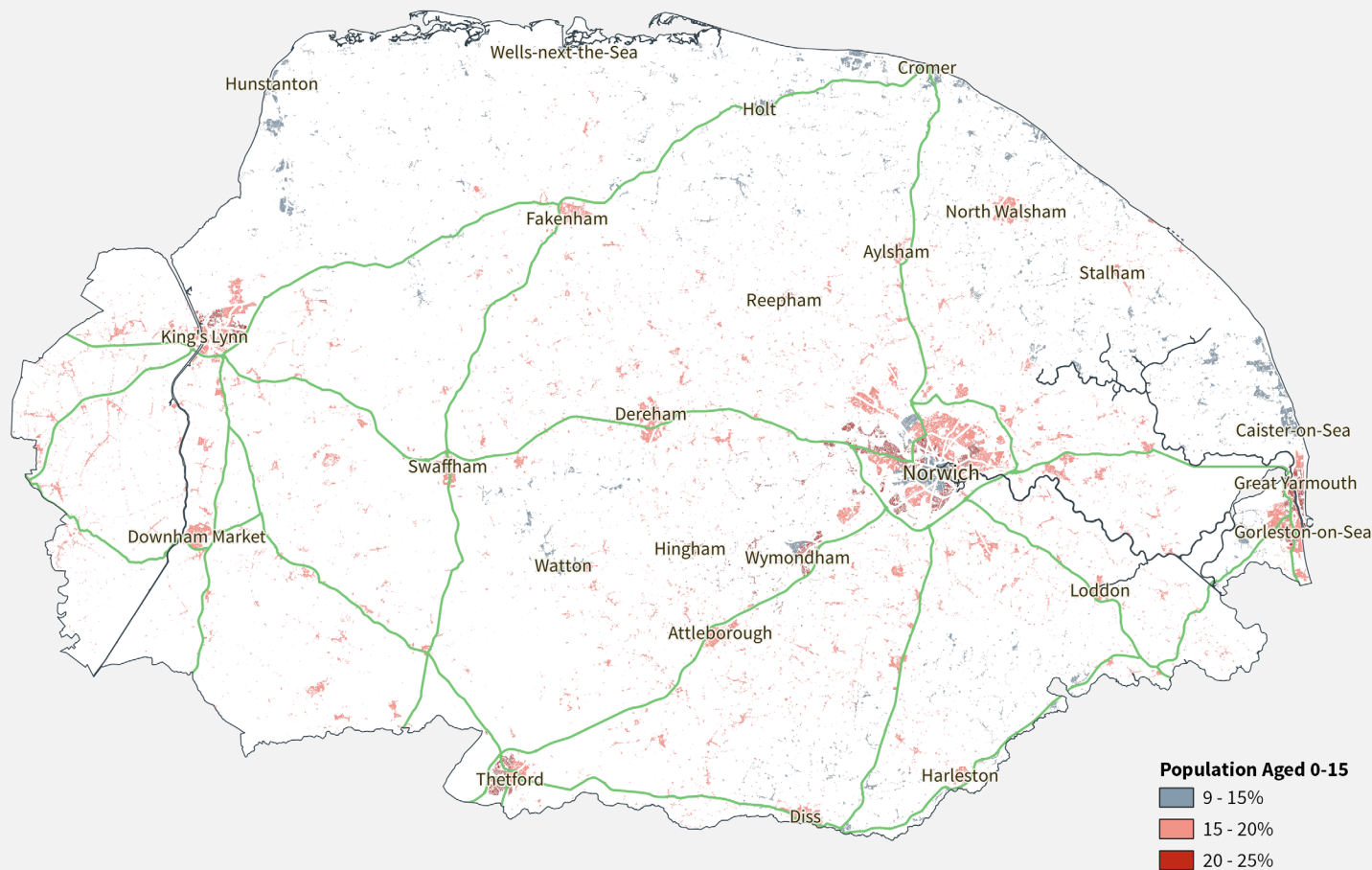


Norfolk's population profile (3)

Norfolk's cities and larger towns are hubs for its working age population...

Young people and working age residents are concentrated in Norwich, King's Lynn, Great Yarmouth and some of Norfolk's market towns such as Attleborough, Downham Market and Thetford. Older residents (aged 65+) predominantly reside along Norfolk's coastline, including in places like Hunstanton, Wells-next-the-Sea, Cromer and Caister-on-Sea.

Aged 0-15

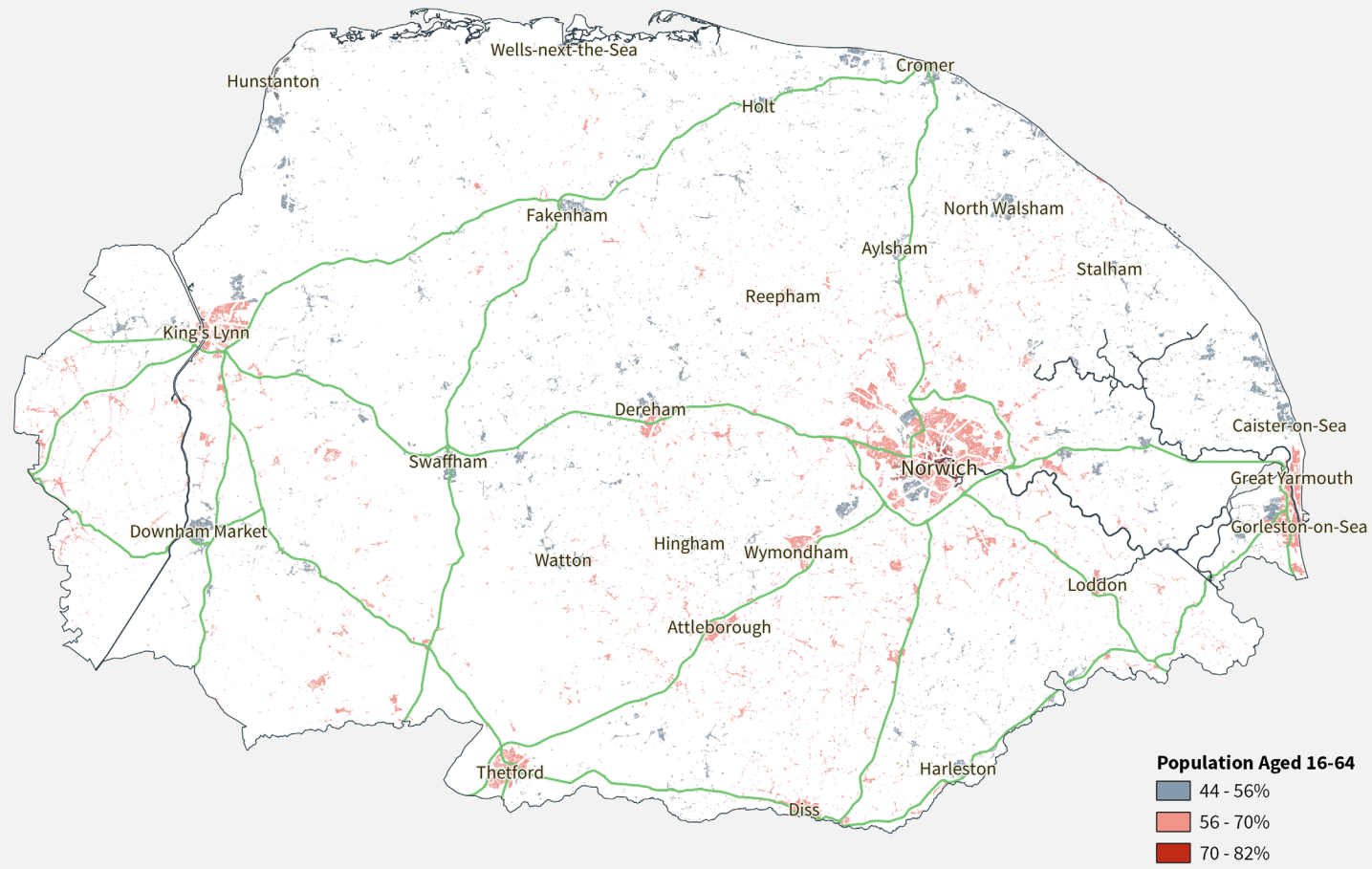




Norfolk's population profile (4)

Norfolk's cities and larger towns are hubs for its working age population...

Aged 16-64



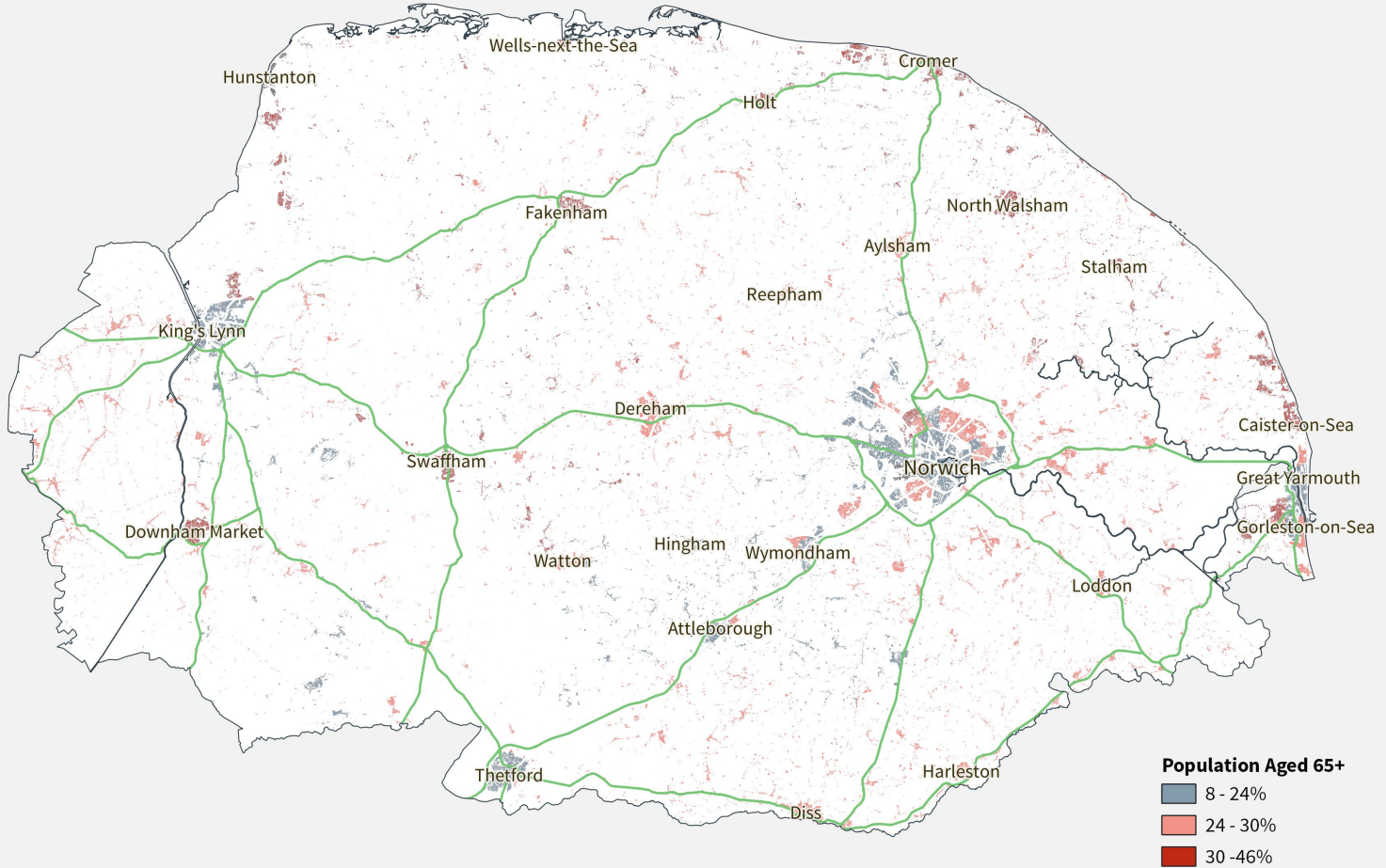
Source: ONS, Population estimates - local authority based by single year of age (2019).



Norfolk's population profile (5)

With coastal and rural areas home to an older population...

Aged 65+



Source: ONS, Population estimates - local authority based by single year of age (2019).



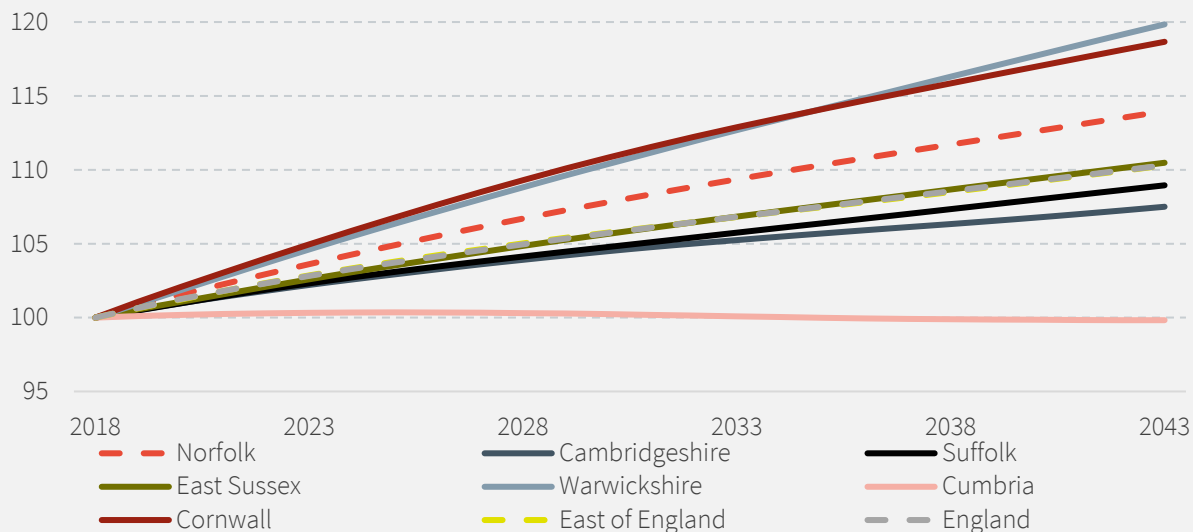
Norfolk's future population (1)

Norfolk's demographic profile is projected to become further entrenched, with population growth expected to be driven by retirees...

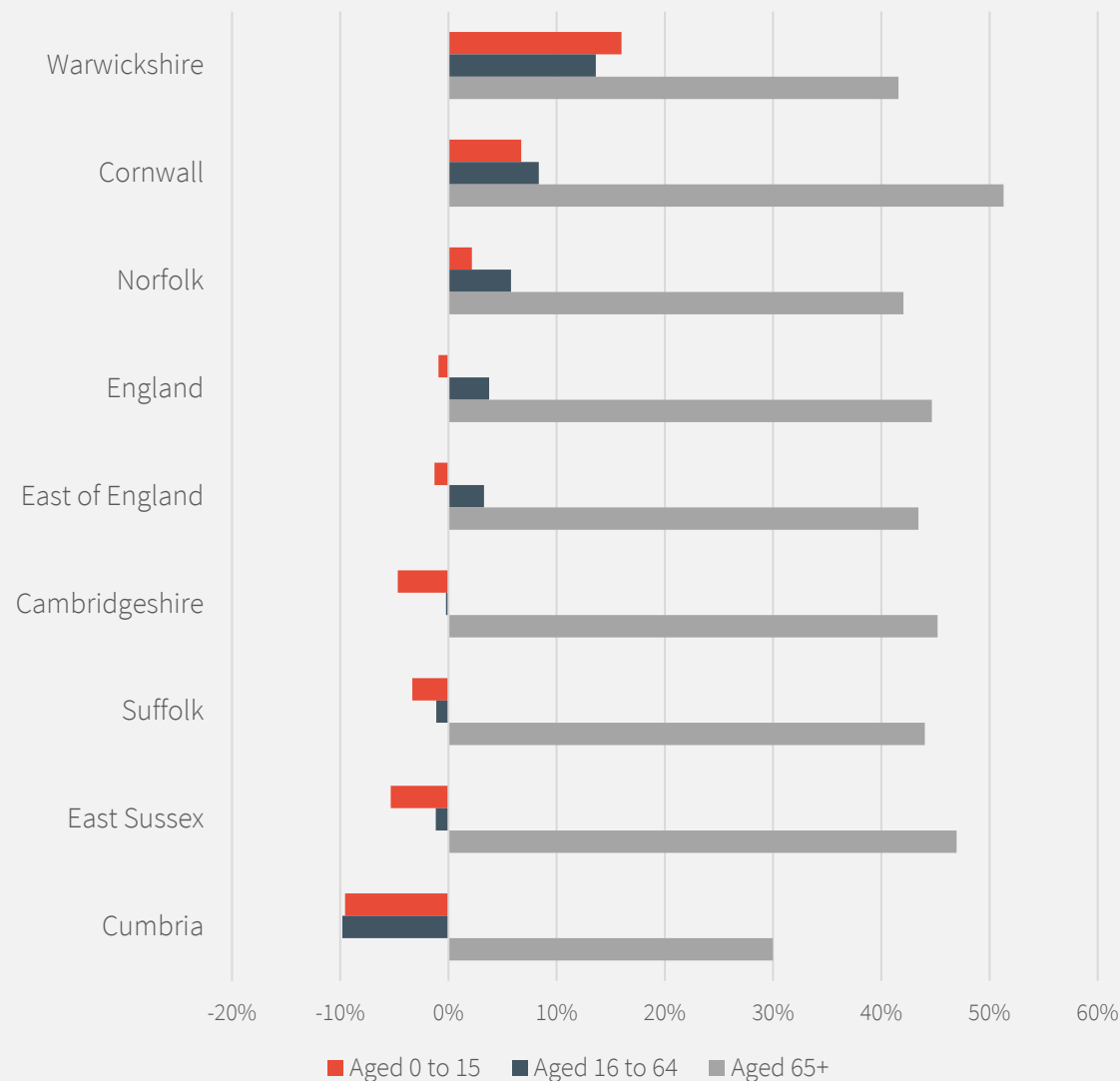
Norfolk's population is projected to increase to 1.02 million by 2043. This is equivalent to 14% growth which is higher than expected for the East of England (10%) and England (10%).

Over this period the highest rate of population growth is expected in Norfolk's population aged 65+ (42%). The working age population (aged 16-64) is projected to increase by only 6% in Norfolk, although this is higher than both East of England (3%) and England (4%).

Projected population change, 2018-2043 (Index 2018=100)



Population forecasts by age group, 2018-2043



Source: Population projections - local authority based by single year of age, ONS (2019). *No difference in area type between dashed and solid lines.



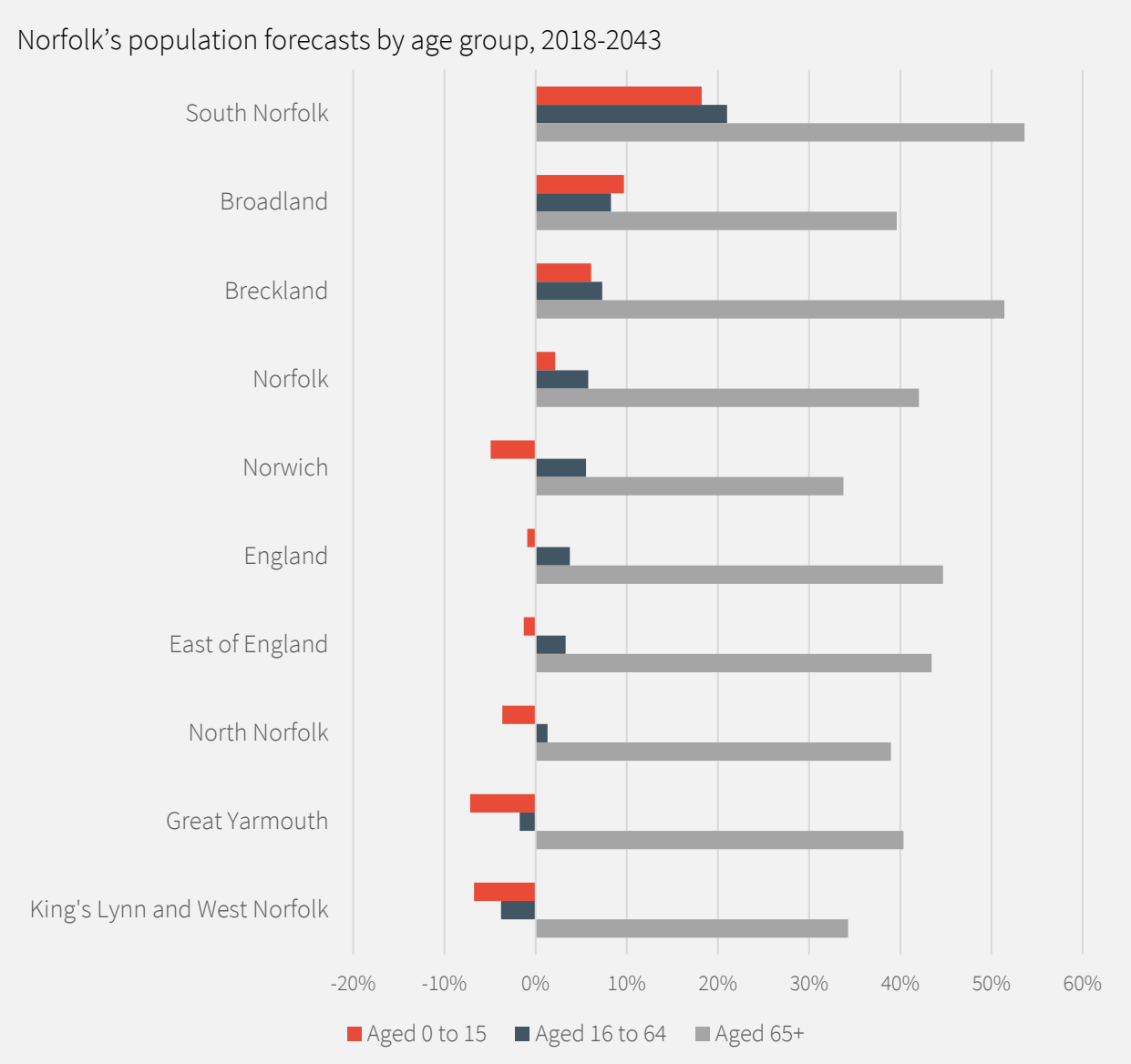
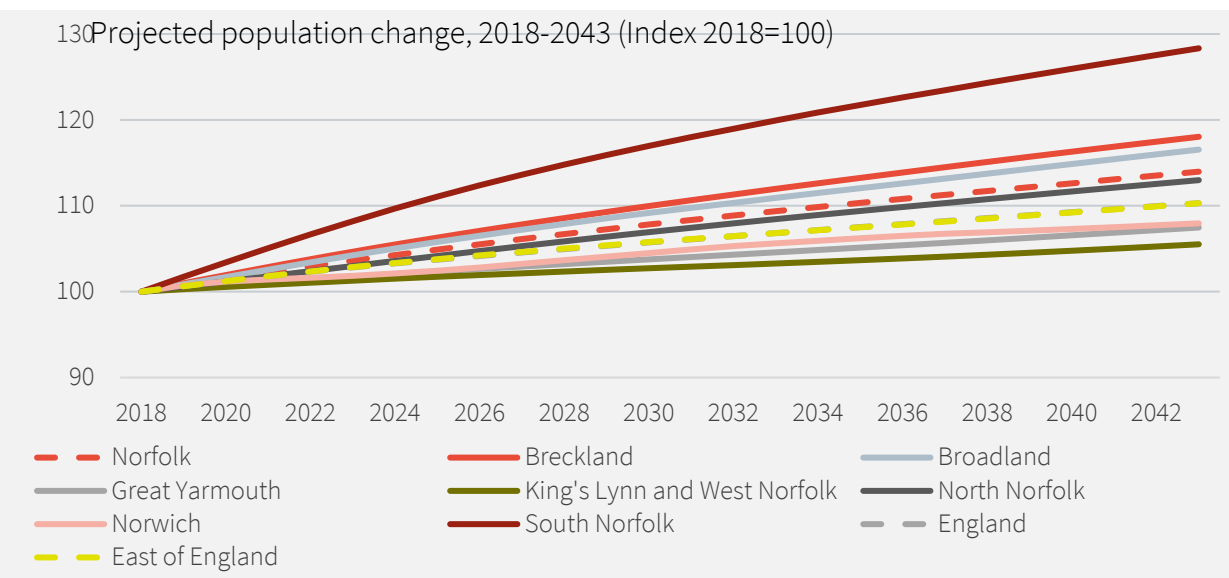
Norfolk's future population (2)

Population growth is forecast to be highest amongst older people in rural districts...

Population projections from 2018 until 2043 indicate that the highest rates of population growth are expected to be in South Norfolk (28%), Breckland (18%) and Broadland (17%) which are all significantly above the Norfolk (14%), East of England (10%) and England (10%) averages for this period.

Growth in the population aged 65+ is forecast to be highest in South Norfolk (54%) and Breckland (51%) which are both above the East of England (43%) and national averages (45%). The working age population (aged 16-64) is projected to decline in only King's Lynn and West Norfolk (-4%) and Great Yarmouth (-2%) which differs from the increases expected at the East of England (3%) and England (4%) levels.

The population aged 0-15 is projected to increase in South Norfolk (18%), Broadland (10%) and Breckland (6%) while this age group is expected to decline overall at the East of England (-1%) and England (-1%) levels.



Source: Population projections - local authority based by single year of age, ONS (2019) *No difference in area type between dashed and solid lines.

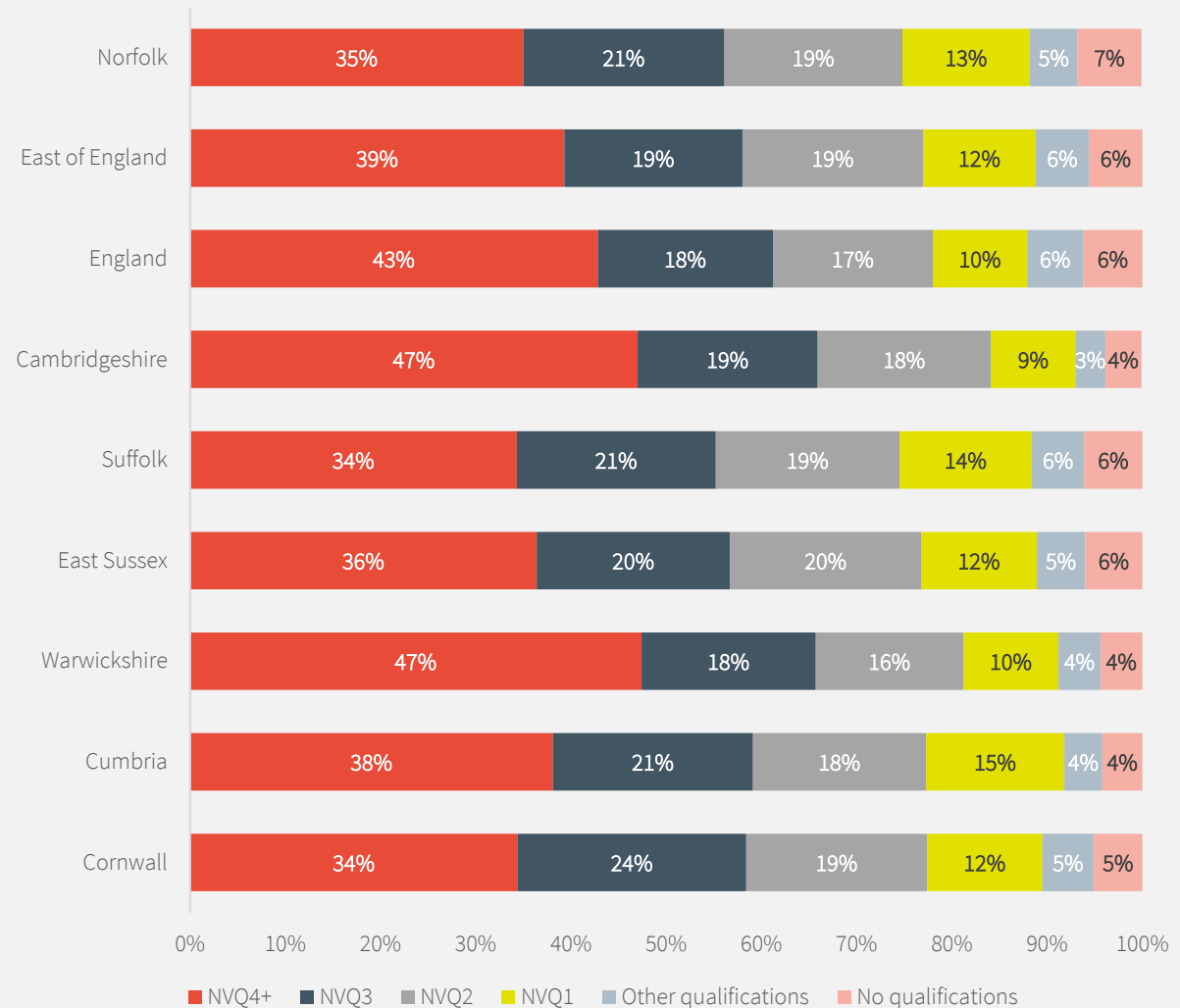


Norfolk has a smaller proportion of people with higher education qualifications...

The percent of the population with higher education qualifications is lower in Norfolk than the National average:

- 35% of residents hold NVQ Level 4+ qualifications which is lower than both the East of England (39%) and England (43%);
- 7% of residents hold no qualifications which is higher than both the East of England (6%) and England (6%);
- 53% of residents hold qualifications between NVQ Level 1 to NVQ Level 3 qualifications which is higher than both the East of England (50%) and England (45%).

Qualification levels by county, 2020





Norfolk's skills inequality

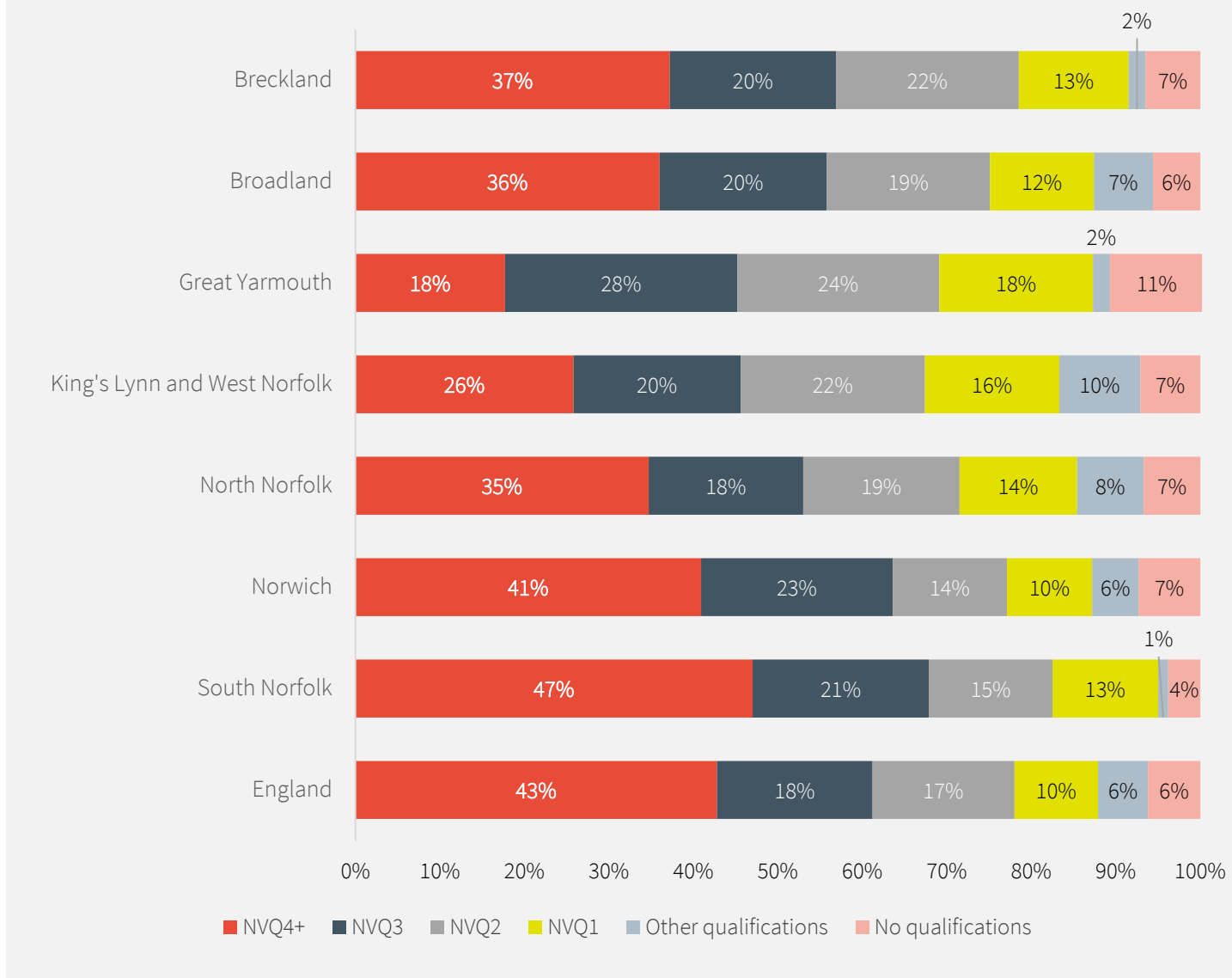
Norfolk's skills and qualifications attainment varies across the County ...

While almost half (47%) of residents in South Norfolk hold degree level qualifications, only 18% hold the equivalent in Great Yarmouth. This compares to 39% in the East of England and 43% in England.

The proportion of residents holding no qualifications is highest in Great Yarmouth (11%) compared to a much lower level in South Norfolk (4%). These rates compare to 6% in the East of England and 6% in England.

The proportion of residents holding low and mid level qualifications (NVQ Level 1 to Level 3) also varies across the county. 70% of residents in Great Yarmouth hold qualifications at this level compared to the lowest levels in Norwich (47%).

Qualification levels by district, 2020





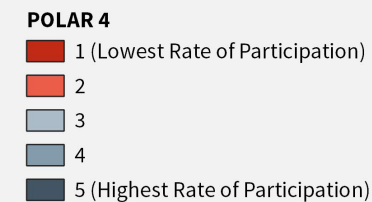
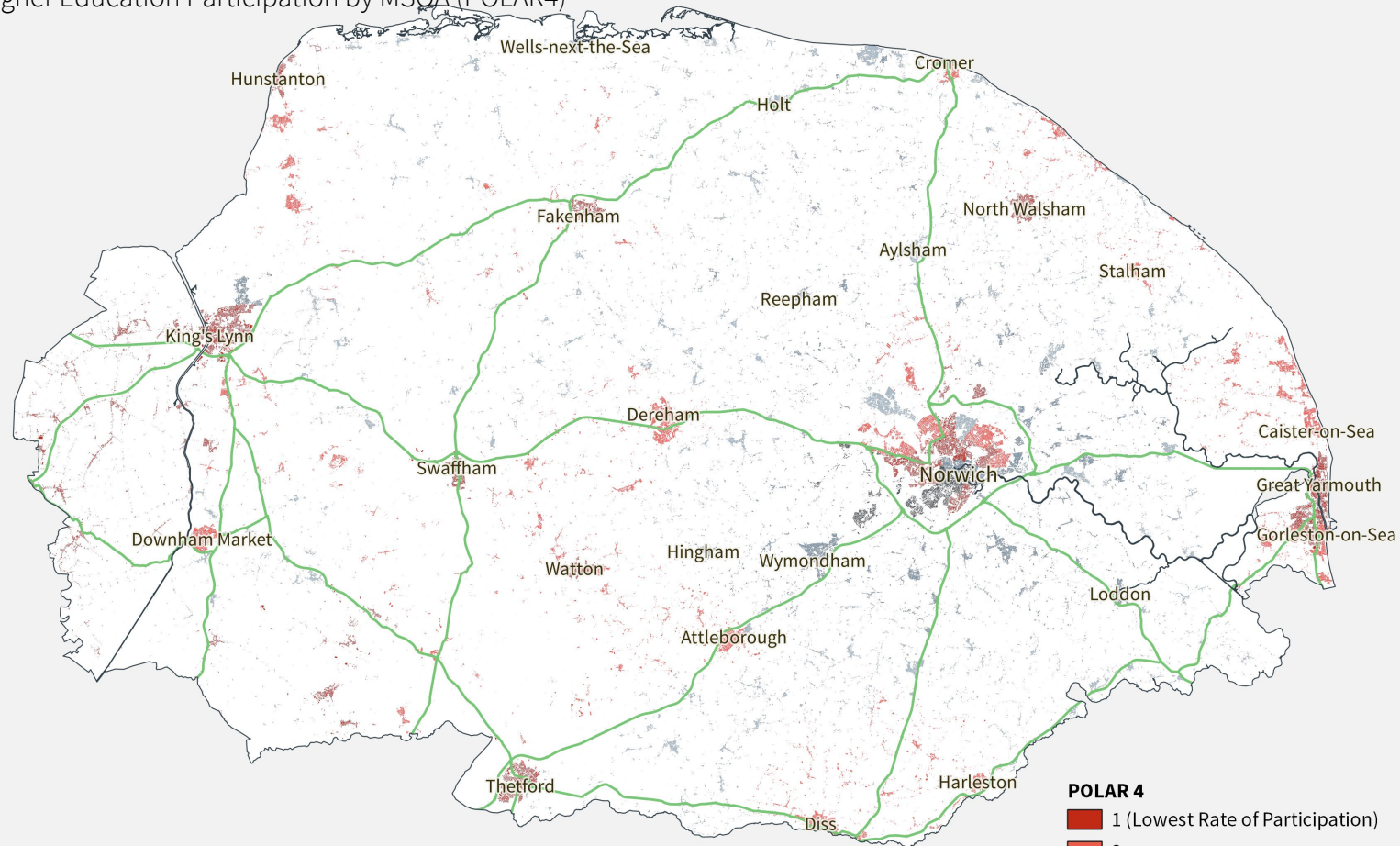
Norfolk's educational attainment

Educational attainment in Norfolk is lower than all comparator areas ...

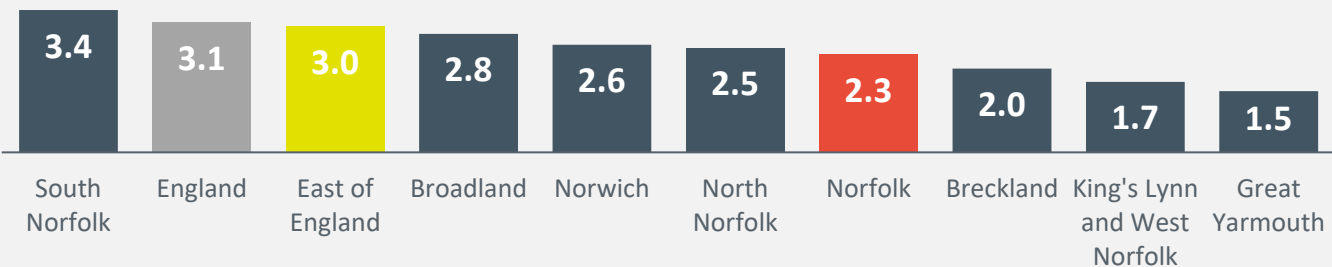
In 2019, only 60% of KS2 pupils in Norfolk reached the expected standard in reading, writing and mathematics. This is lower than the average for the East of England (64%) and England (65%). At KS4, pupils in Norfolk achieved an average Attainment 8 score of 49.2, which is again lower than both the East of England (50.3) and England (50.2) averages.

The Participation of local areas (POLAR) classification groups areas across the UK based on the proportion of young people who participate in higher education. Norfolk has an average POLAR4 quintile score of 2.3 which is lower than the East of England (3.0) and England (3.1) averages – indicating that the rate of participation of young people in higher education in Norfolk is below average. Within Norfolk, the rate of higher education participation is particularly low in Great Yarmouth (1.5) and King's Lynn and West Norfolk (1.7).

Higher Education Participation by MSOA (POLAR4)



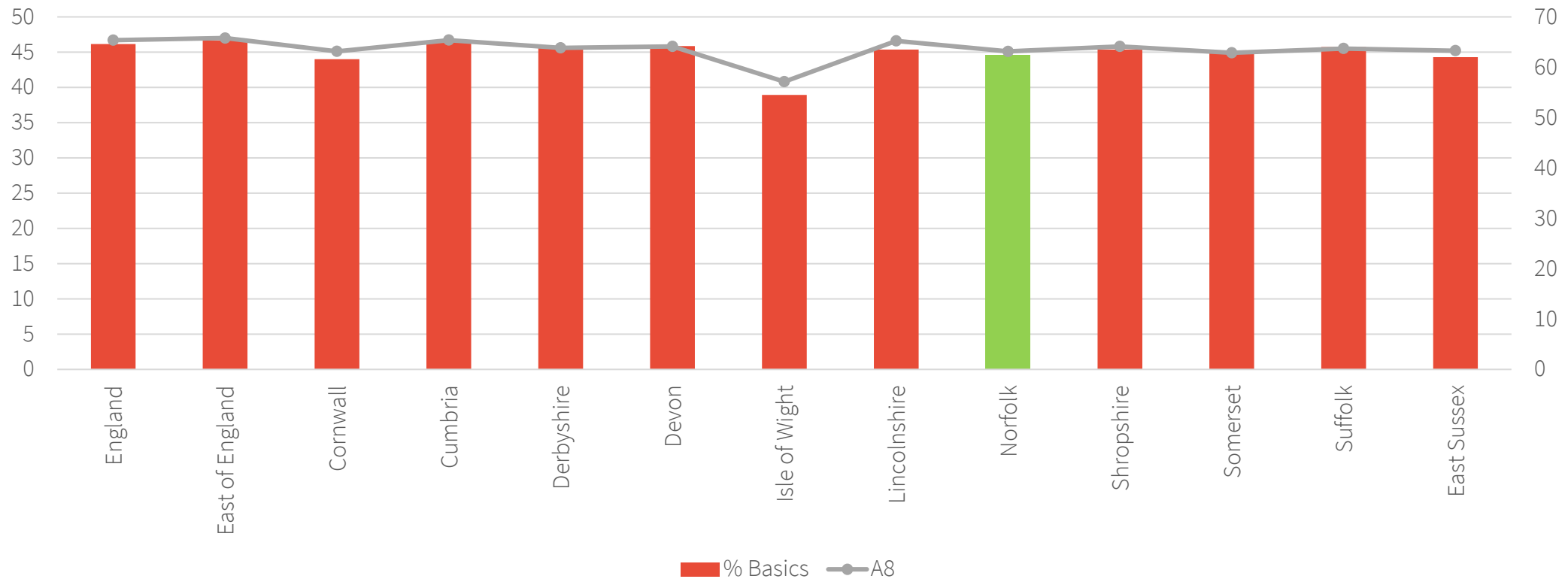
Average POLAR4 Quintile Score



Norfolk's educational attainment

- In 2019 pupil attainment at GCSE is similar to national average with 63% passing English and Mathematics, compared to 64.6% nationally. Children make better than average progress at secondary school, but a legacy of underachievement at primary school results in fewer children attaining higher grades compared to national figures.
- Attainment 8 measures the progress across a student's eight best performing subjects. Norfolk is in line with national average for English and Mathematics (65% England vs. 62% Norfolk). Norfolk is also in line in Attainment 8 (England 47% vs. 45% Norfolk)

% Achieving Basics: English & Mathematics at Grade 4+ & Attainment 8



Norfolk's Higher Education and Further Education Colleges

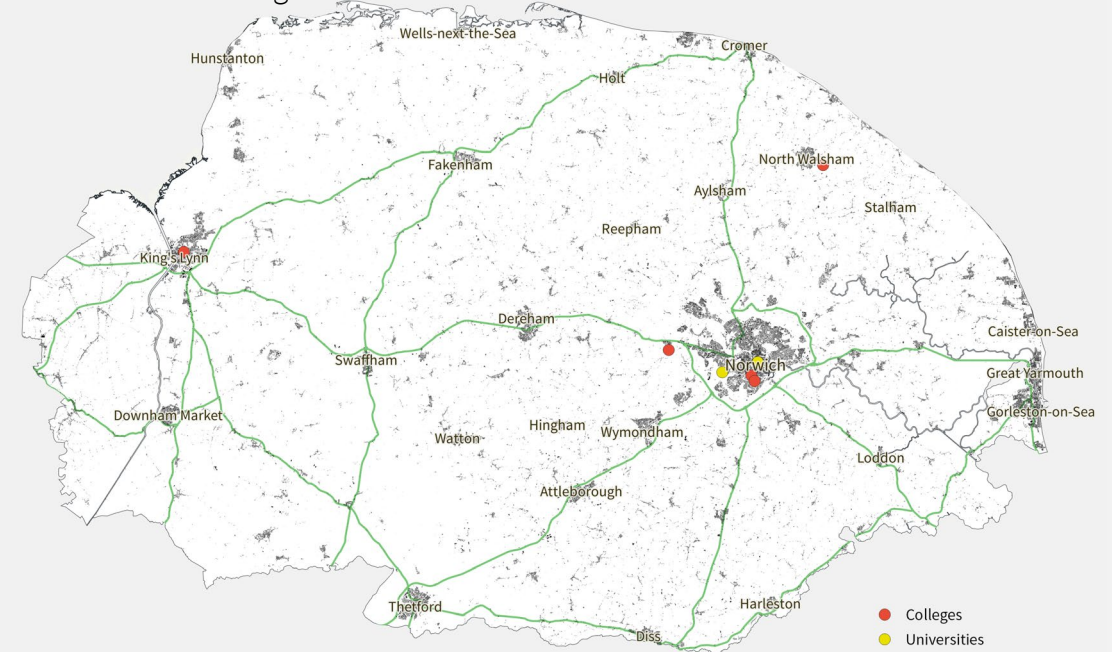
Norfolk's HE providers perform similarly to regional and national averages...

The growth in total student enrolment across Norfolk's HE providers is lower than in the East of England, at 13% compared to 16%. However, it is above the national average of 9%.

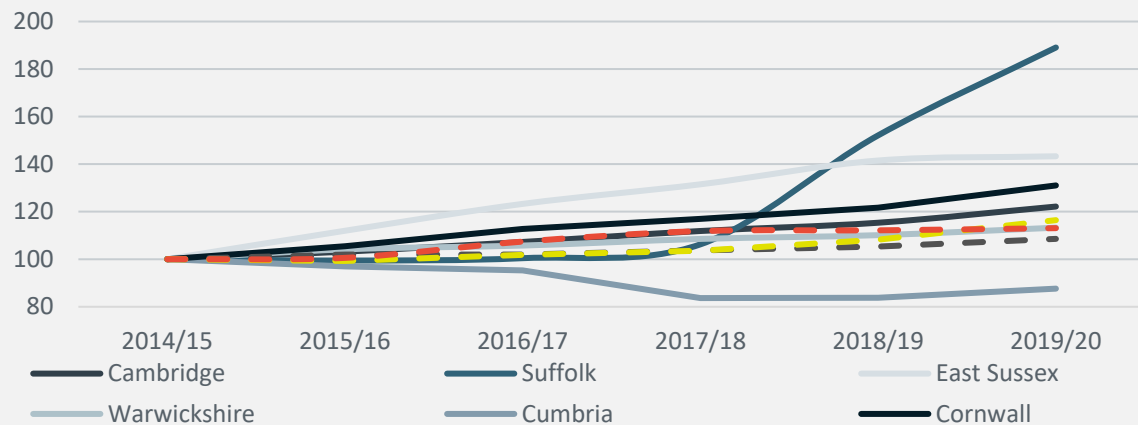
Norfolk is home to two universities and five Further Education colleges. The Norwich University of Arts (NUA) has consistently been ranked in the UK Top 25 Universities over the past five years and has a high proportion of students enrolling onto Creative Arts and Design courses (79%). The University of East Anglia (UEA) has a broader range of popular subjects, with 19% of students studying Business and Management which is also the most popular subject across the East of England. 15% of students studied social sciences subjects, and 13% studied subjects allied to medicine.

The level of qualification obtained at UEA broadly aligns with regional and national averages. However, at NUA, much fewer students study postgraduate degrees at just 10%, compared to 39% in England.

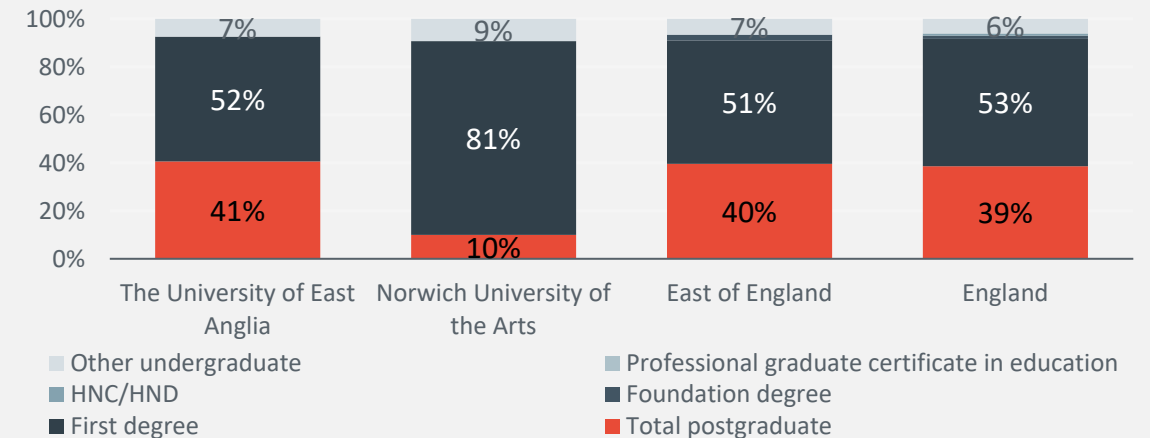
Location of HE and FE Colleges



Total Student Enrolment 2014/15 – 2019/20



Level of Qualification Obtained 2019/20



Source: HESA (2019/20). *No difference in area type between dashed and solid lines.



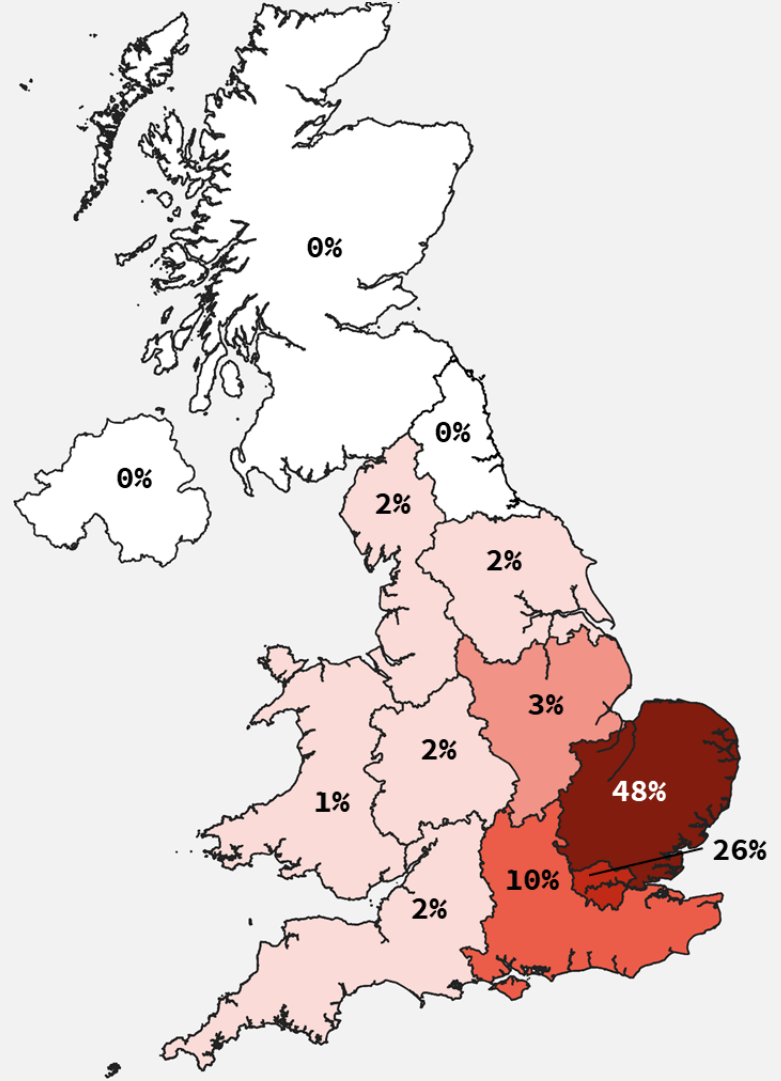
Norfolk's Graduates

Graduates are well retained in the region, with large percentages entering the workforce...

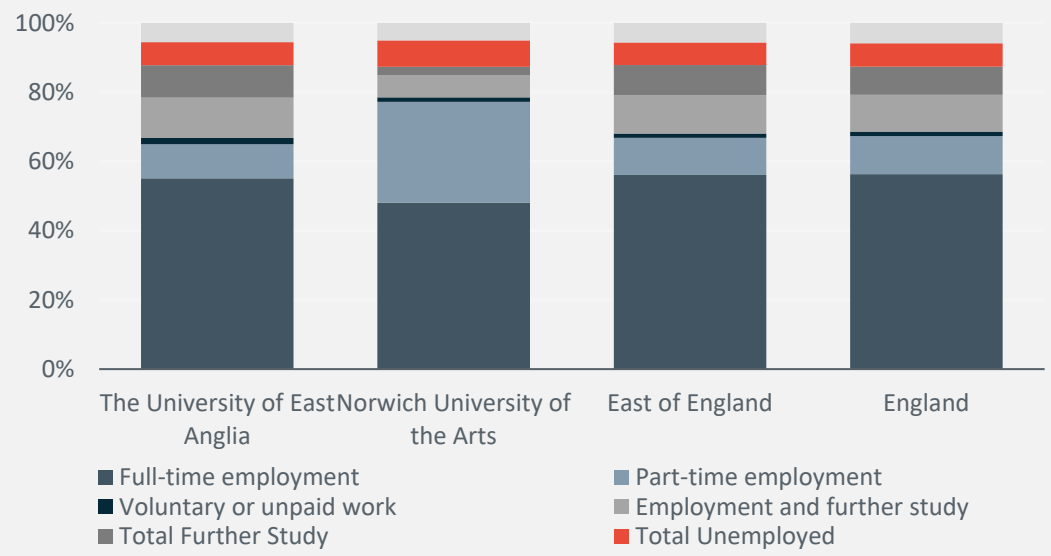
The East of England retains a large proportion of undergraduates who have studied in the region, with 48% of graduates (from Norfolk universities) remaining in the East of England to work. The largest outflow of graduates outside of the region is to London, with 26% of graduates, followed by the Southwest with 10% of graduates. However, there is a large proportion of 18-25 who although have grown up in Norfolk move elsewhere for higher education.

Graduate outcomes from Norfolk's higher education providers are broadly in line with regional and national averages, with most graduates entering full or part time employment. However, Norwich University of Arts has a lower percentage of graduates in full time employment at 48% compared to 56% in England, but a higher percentage of graduates in part-time employment at 29% compared to 11% in England.

Destination of East of England Undergraduates living in the UK Entering Work 2018/19



Graduate Outcomes 2018/19





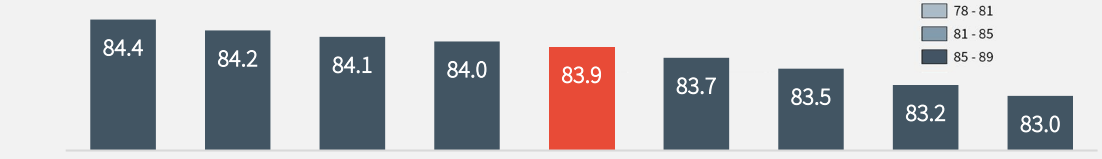
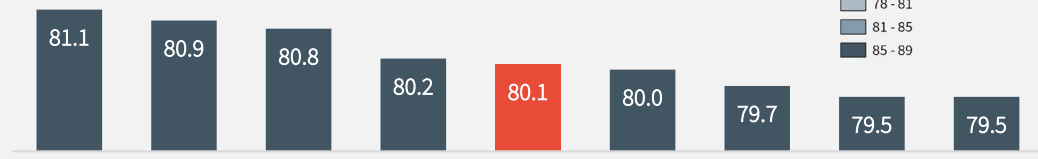
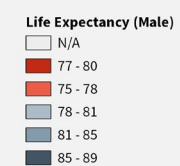
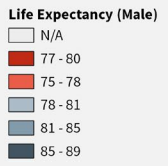
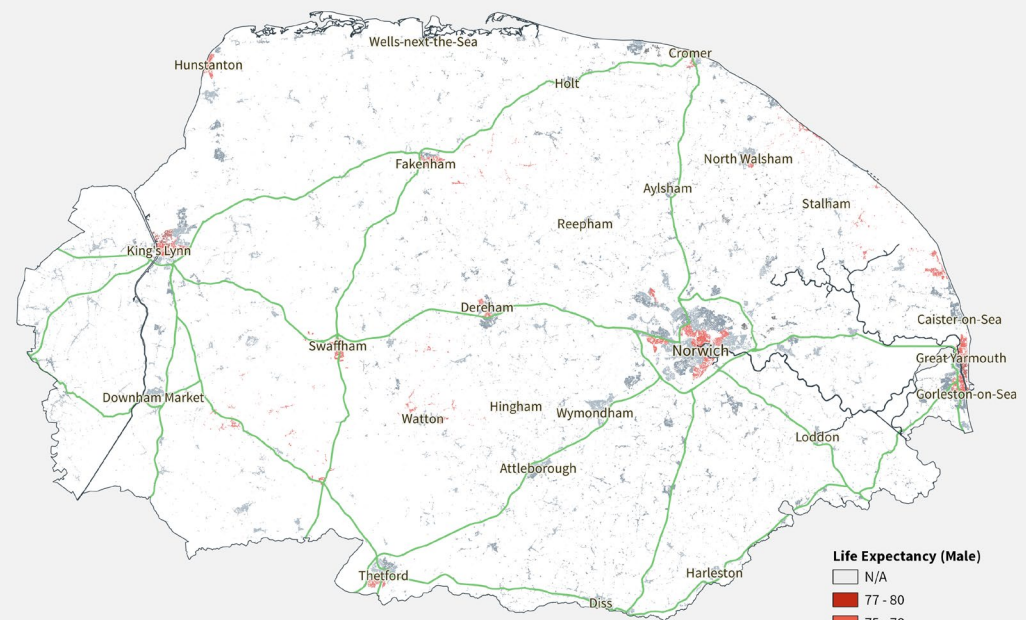
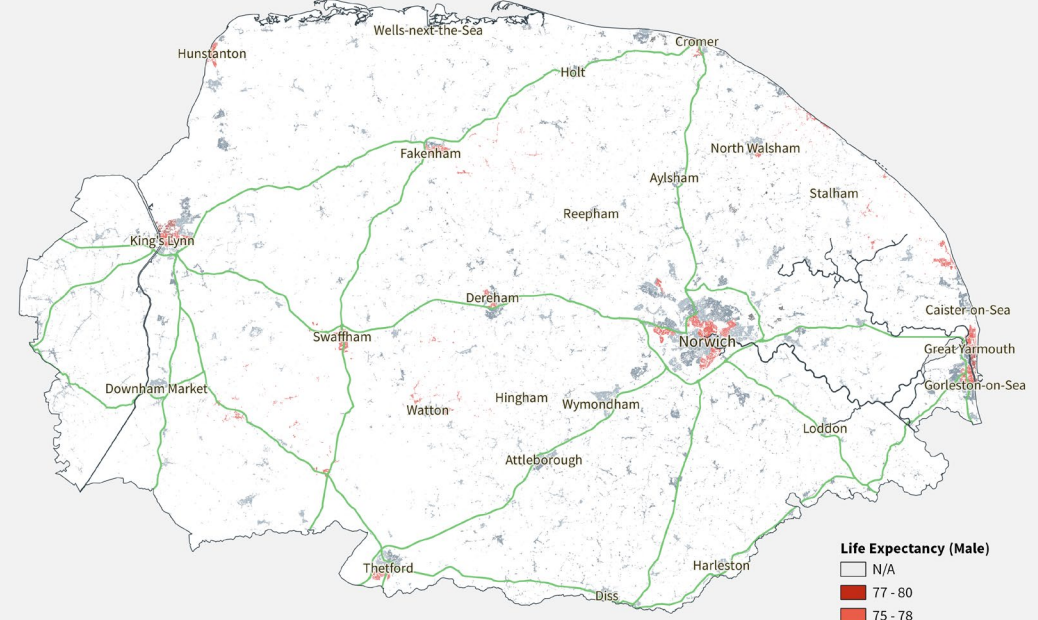
Norfolk's health outcomes

Life expectancy in Norfolk is above the national average but below that for regional comparators...

Male life expectancy in Norfolk is 80.1 years and female life expectancy is 83.9 years. Life expectancy for both male and female Norfolk residents is below the East of England average with significant variations across the county. Some of the lowest life expectancies are seen in Norfolk's main cities and towns, while life expectancy for both genders is higher in more rural locations.

Male life expectancy at birth (2015-2019)

Female life expectancy at birth (2015-2019)



Source: Public Health England, Local Area Profiles (2019).



Norfolk's wellbeing

Wellbeing levels in Norfolk are largely in line with regional averages...

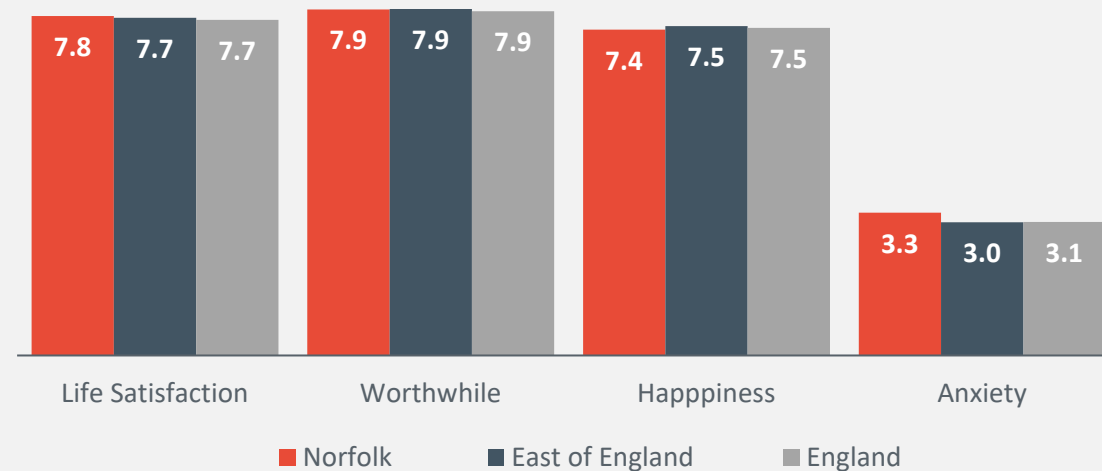
Measures of personal wellbeing for residents at the Norfolk level indicate:

- + Life satisfaction is above average with residents reporting 7.9 compared to the East of England (7.7) and England (7.7).
- + Resident feeling that things done are worthwhile is in line with averages with Norfolk scoring 7.9 compared to the East of England (7.9) and England (7.9).
- + Resident happiness is slightly below average at 7.4 compared to the East of England (7.5) and England (7.5) averages.
- + Resident anxiety is higher than average at 3.3 in Norfolk compared to the East of England (3.0) and England (3.1) averages.

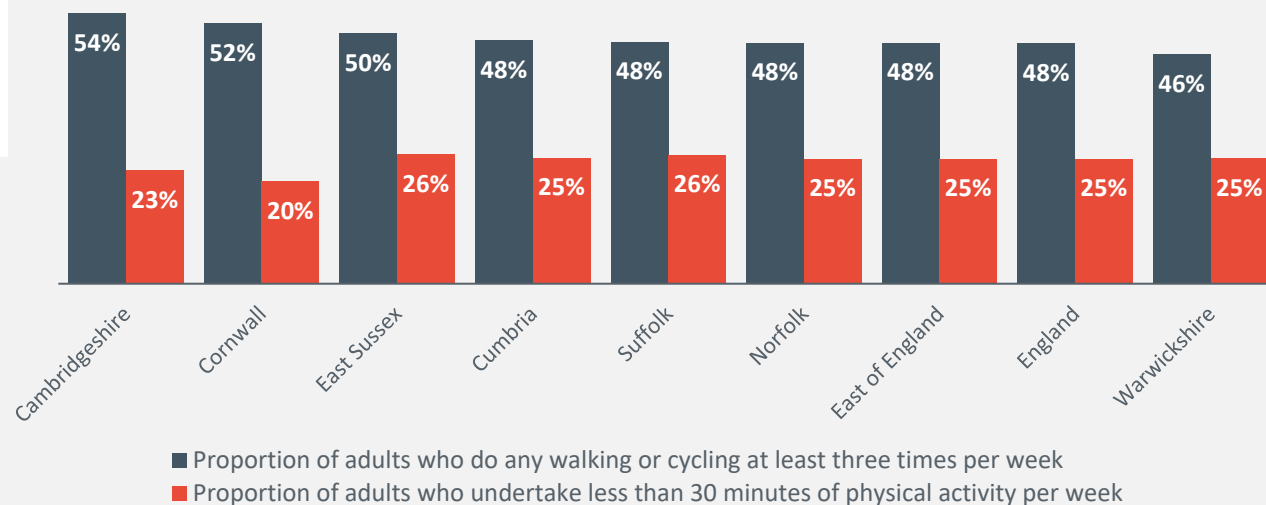
In terms of physical activity, Norfolk performs in line with East of England and England averages:

- + 48% of Norfolk's adult residents walk or cycle at least three times a week which is in line with the East of England (48%) and England (48%).
- + 25% of Norfolk's adult residents undertake less than 30 minutes of physical activity per week which is also in line with the East of England (25%) and England (25%).

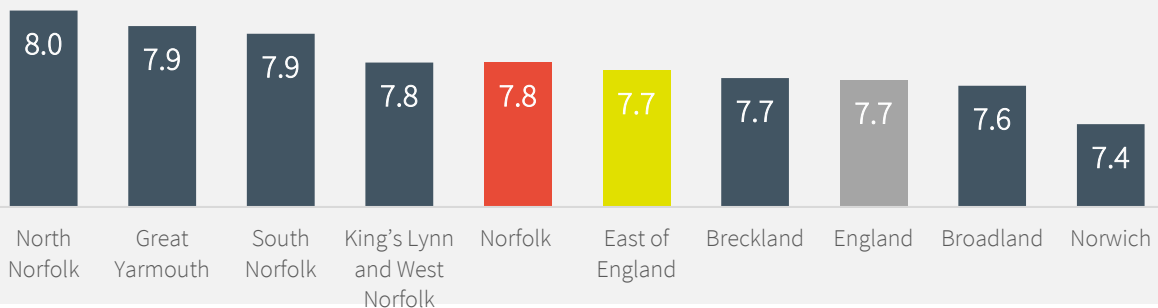
Wellbeing scores, 2019/20



Physical Activity Levels, 2018/19



Life Satisfaction, 2019/20



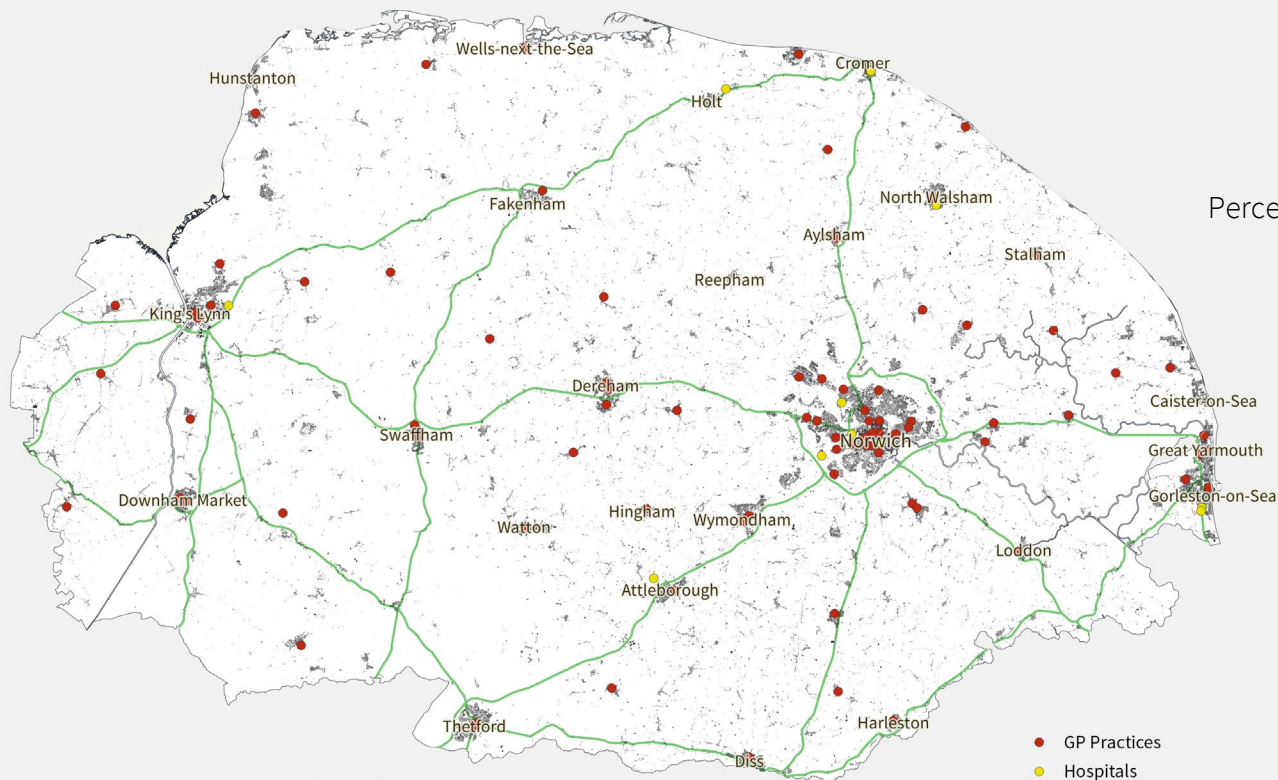


Norfolk's health services

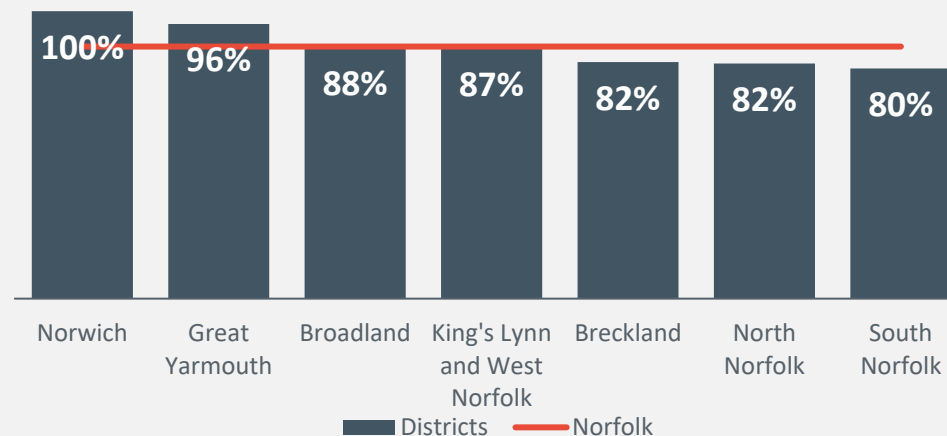
Access to Norfolk's health services varies geographically...

Health services within the County are concentrated in Norwich, King's Lynn, and Great Yarmouth. In the Norwich and Great Yarmouth Districts, 100% and 96% of service users respectively are within 30 minutes by public transport/walking to a GP service. However, in the districts of North Norfolk and South Norfolk this figure falls to just below 80%.

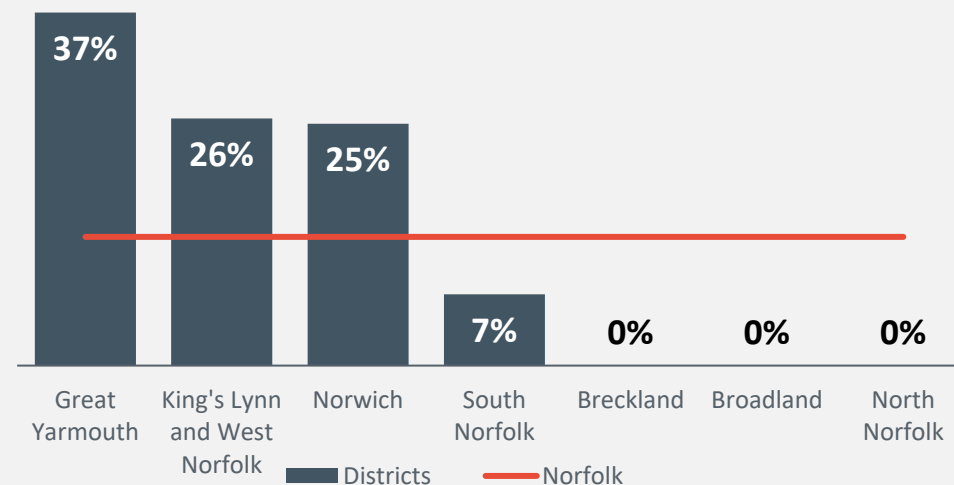
The percentage of users within 30 minutes of hospitals by public transport/walking is lower. Great Yarmouth records the highest percentage at 37%, but in Breckland, Broadland, and North Norfolk, 0% of users are within 30 minutes of hospitals by public transport/walking.



Percentage of users within 30 minutes of GP services by public transport / walking, 2019



Percentage of users within 30 minutes of hospitals by public transport / walking, 2019





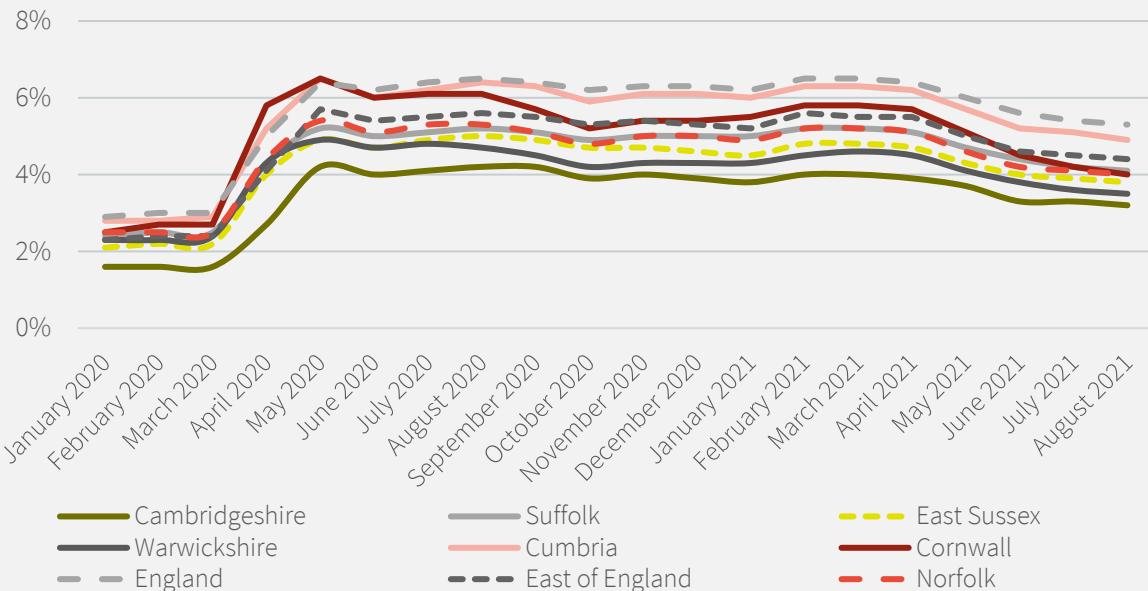
Norfolk's economic activity rates (1)

Norfolk has an economically active population with pockets of unemployment ...

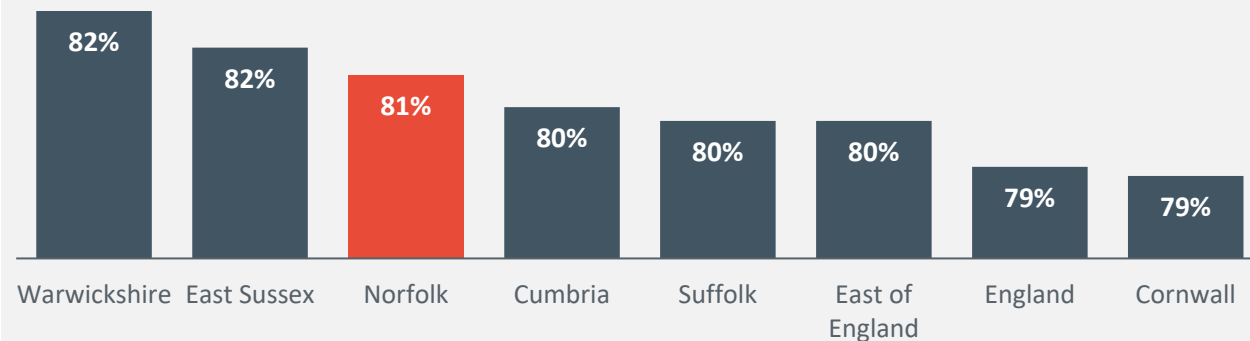
Norfolk has a large labour market as a proportion of total residents in the county. Economically active residents account for 81% of the population, which is higher than the economic activity rate for both the East of England (80%) and England (79%). Despite this, Norfolk has a higher unemployment rate (6%) compared to the East of England (4%) and England (5%).

A long-term overview of claimant count demonstrates that the rate of claimants in Norfolk has consistently been in line or below the national average for England. Claimant count in Norfolk has however remained above the levels in comparator areas.

Claimant count, 2010-2021

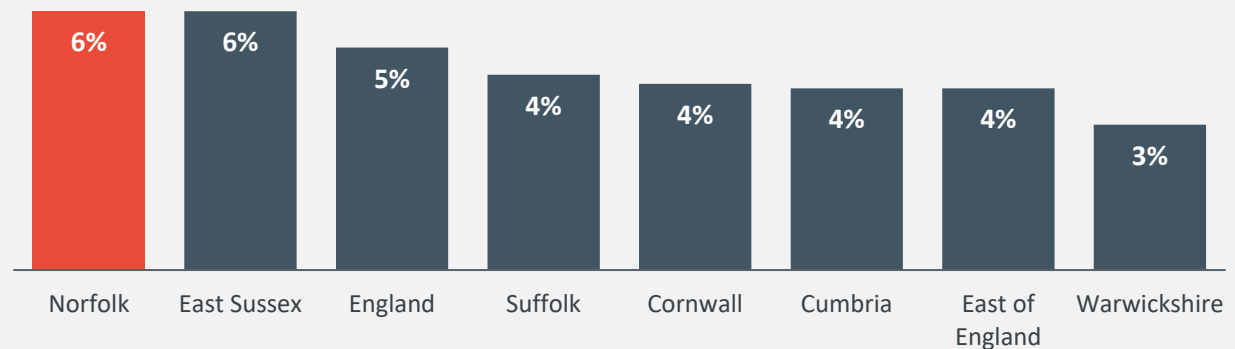


Economic activity rate, 2020



Economic activity rate: the proportion of residents aged 16 and over with a job or who have sought work in the last four weeks and/or are available to start work in the next two weeks. This group excludes students, carers in the family and home, long-term sick and disabled, temporarily sick and disabled, retired people and discouraged workers.

Unemployment rate, 2020



Unemployment rate: the number of unemployed residents aged 16 and over as a proportion of the total economically active population.



Norfolk's economic activity rates (2)

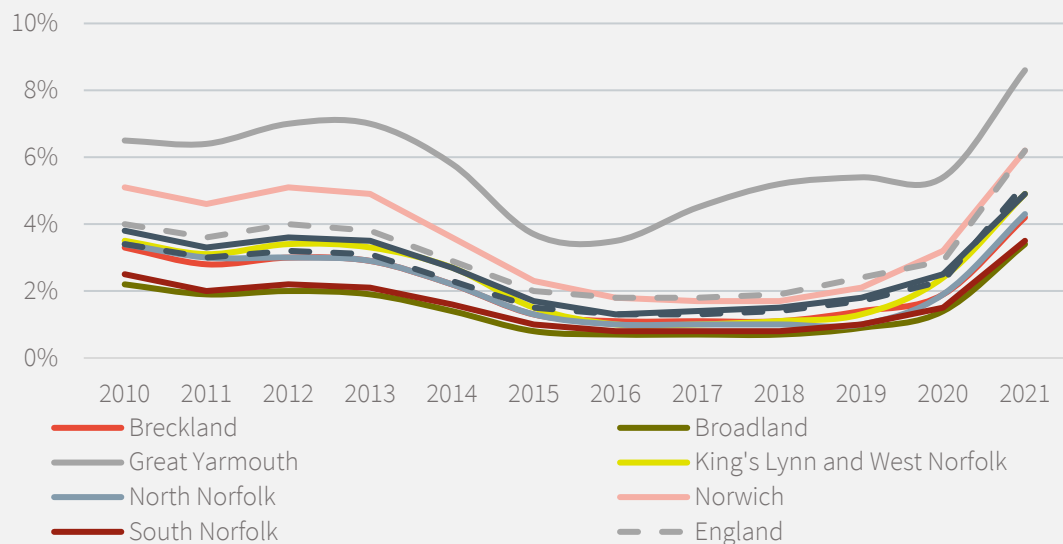
Norfolk's main economic activity challenges are in Great Yarmouth...

Economic activity rates are highest in Broadland (85%) and Breckland (85%) which are both higher than the Norfolk (81%) average. Conversely, Great Yarmouth has an economic activity rate of 72% which is significantly lower than all other districts and the East of England (80%) and England (79%) averages.

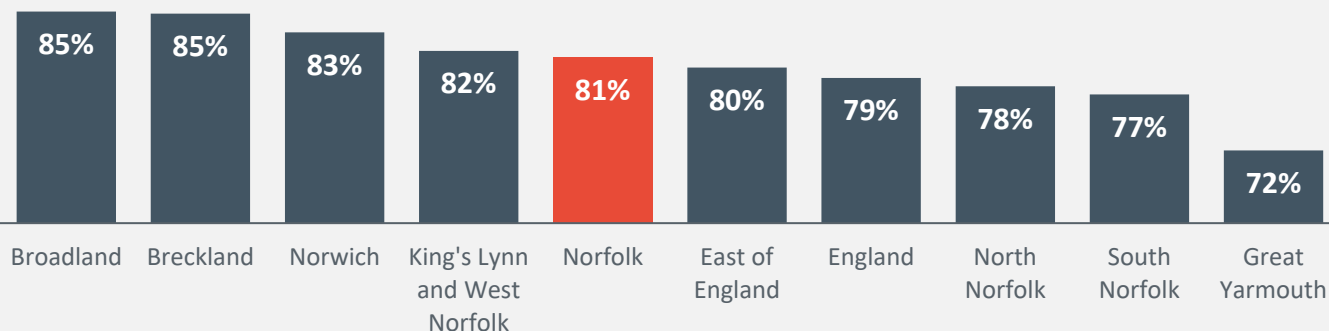
Unemployment rates are also highest in Great Yarmouth (10%). All Norfolk districts have a higher unemployment rate than the England average (5%), with the exception of King's Lynn and West Norfolk (5%).

A long-term view of claimant count demonstrates that the levels of claimants in Great Yarmouth have been persistently higher than the national average, with Norwich claimant counts fluctuating around the levels seen across England.

Claimant count, 2010-2021

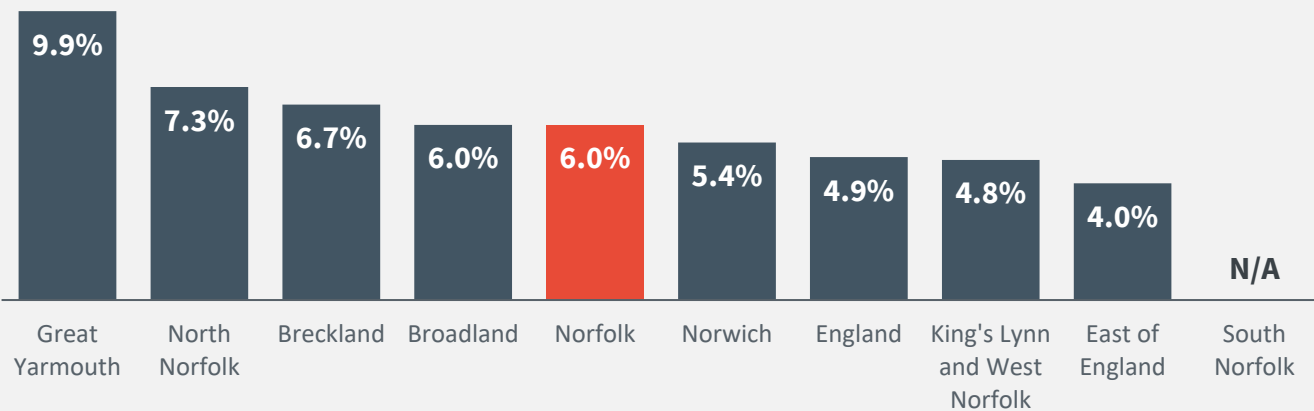


Economic activity rate, 2020



Economic activity rate: the proportion of residents aged 16 and over with a job or who have sought work in the last four weeks and/or are available to start work in the next two weeks. This group excludes students, carers in the family and home, long-term sick and disabled, temporarily sick and disabled, retired people and discouraged workers.

Unemployment rate, 2020



Unemployment rate: the number of unemployed residents aged 16 and over as a proportion of the total economically active population. NB: South Norfolk data suppressed by ONS due to low sample size.



Norfolk's occupational profile

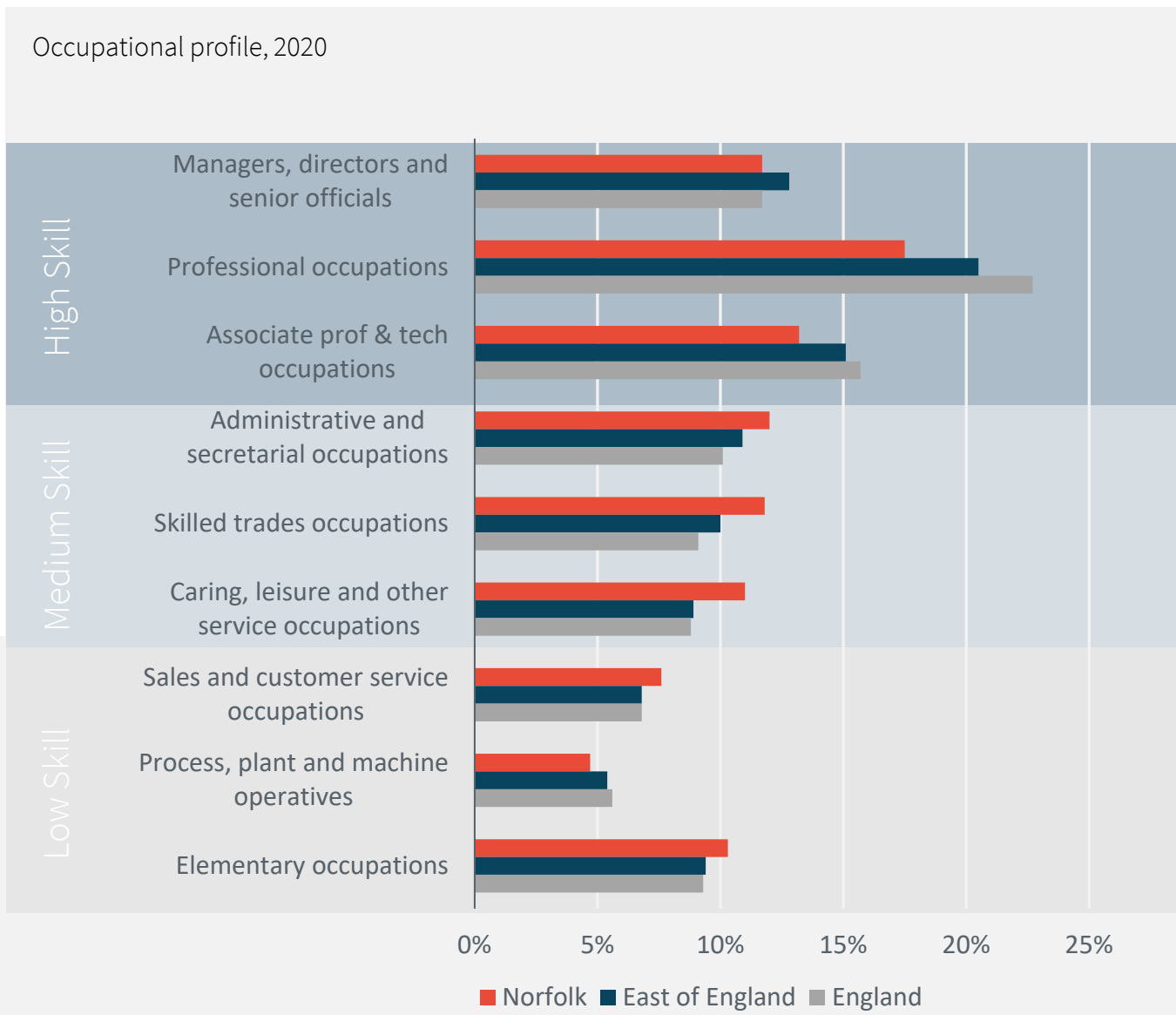
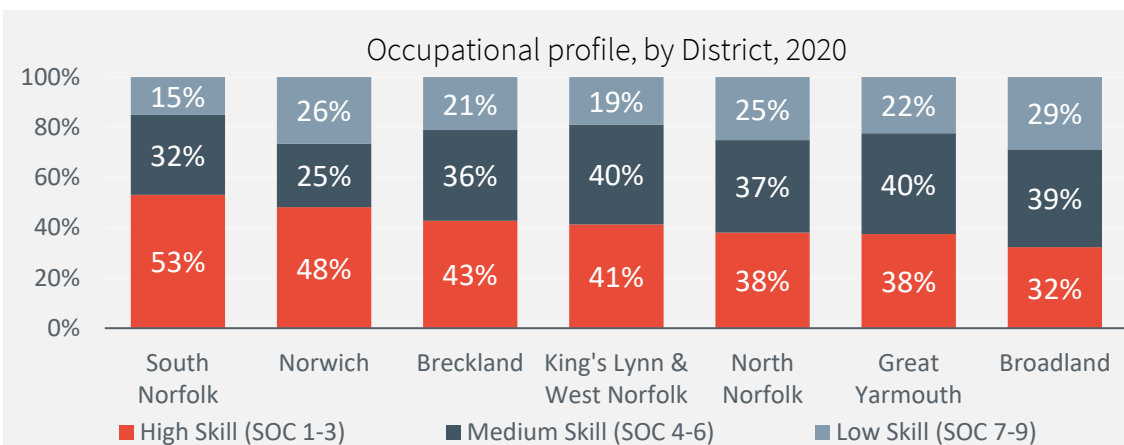
A higher proportion of Norfolk's residents work in low and medium skilled occupations...

Using Standard Occupation Classifications (SOC) from the ONS, it is possible to use the occupational profile to obtain an approximation of jobs that are typically considered to be high, medium and low skill:

- High skill (SOC 1-3): these roles mostly require graduate level education to access
- Medium skill (SOC 4-6): these roles mostly require a Level 3-5 qualification
- Low skill (SOC 7-9): these roles mostly require a Level 2 qualification or below

High skill occupations account for the largest share of employment in Norfolk (42%) although this is lower than that in the East of England (48%) and England (50%). A higher proportion of Norfolk's residents work in middle skill occupations (35%) than is seen at the East of England (30%) and England (28%) level.

South Norfolk and Norwich have the largest proportion of high skilled occupations at 53% and 48% respectively. However, Norwich also has the second highest proportion of low skilled occupations at 26%, behind Broadland with 29%.



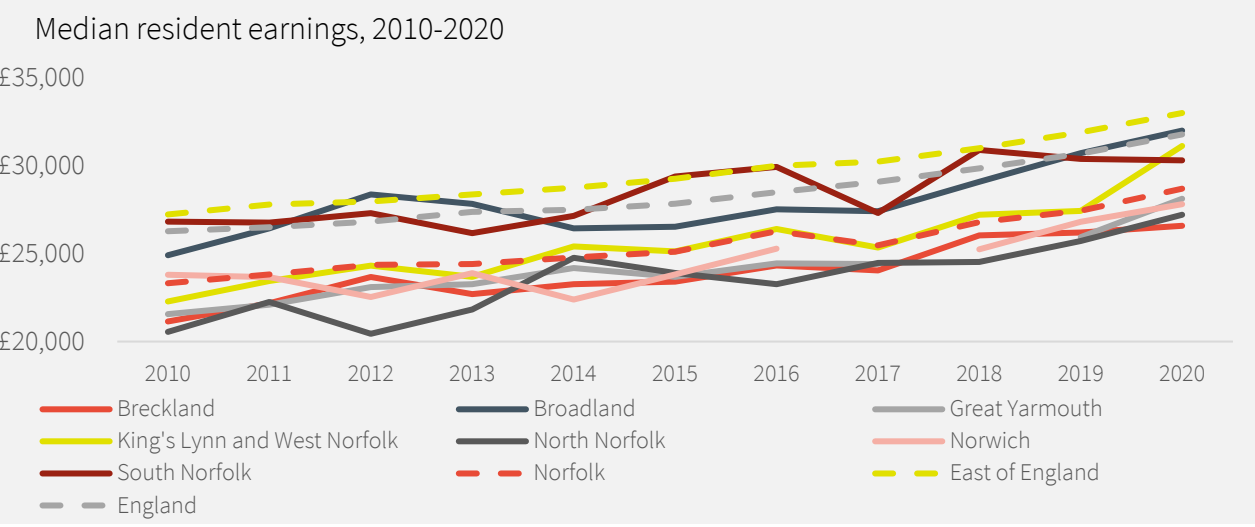
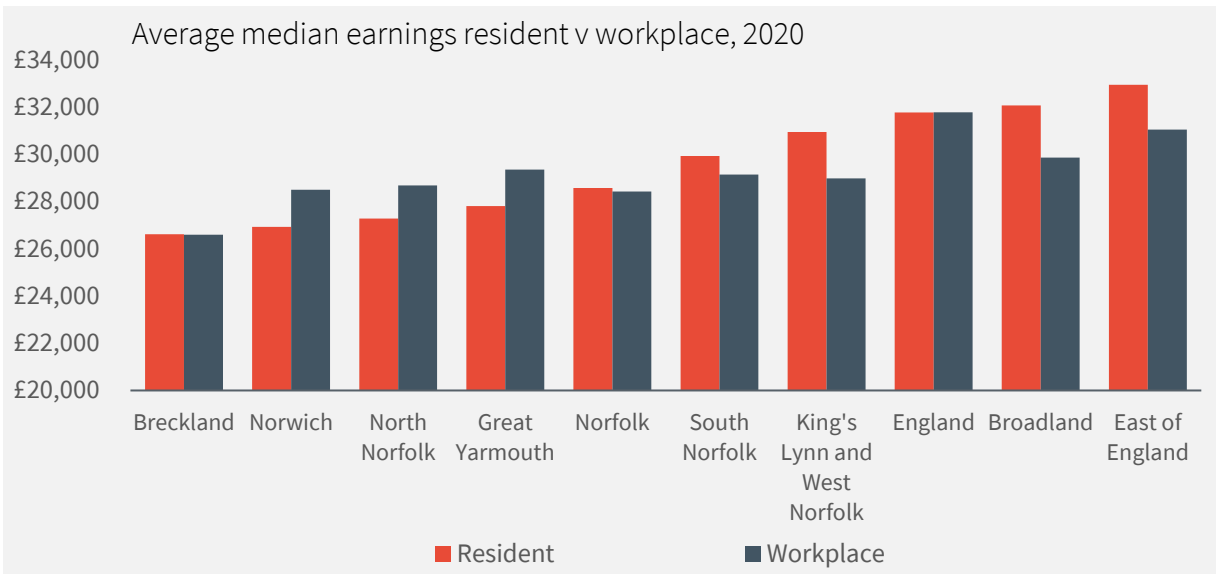
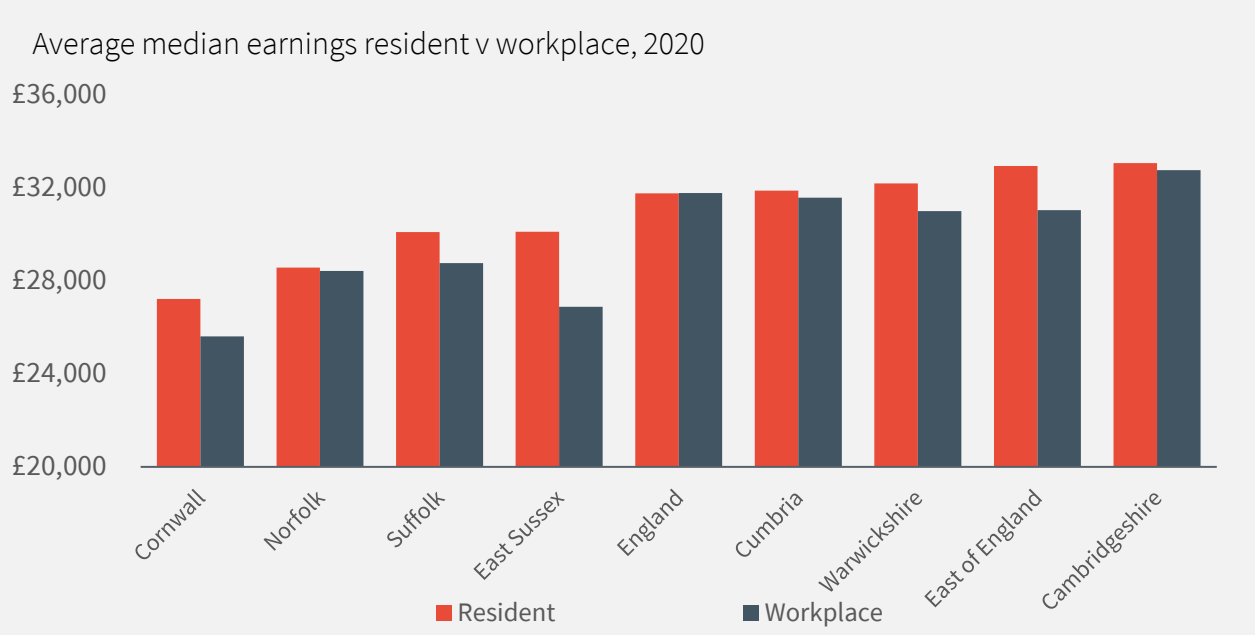


Norfolk's earnings

Earnings in Norfolk are low with little variation in resident and workplace earnings...

Norfolk's residents earned an average annual salary of £28,571 in 2020 which is lower than both the East of England (£32,944) and England (£31,766). Average workplace earnings in Norfolk were £28,424 in 2020 which is also lower than both the East of England (£31,044) and England (£31,777). Norfolk's relatively low earnings for both residents and in the workplace suggests fewer opportunities for access to higher value and higher wage jobs compared to other parts of the country.

Within Norfolk, resident and workplace earnings in 2020 were highest in Broadland at £32,070 and £29,861 respectively. Meanwhile, resident and workplace earnings were lowest in Breckland at £26,613 and £26,597 respectively.



Source: Annual survey of hours and earnings, ONS (2020).

*No difference in area type between dashed and solid lines.



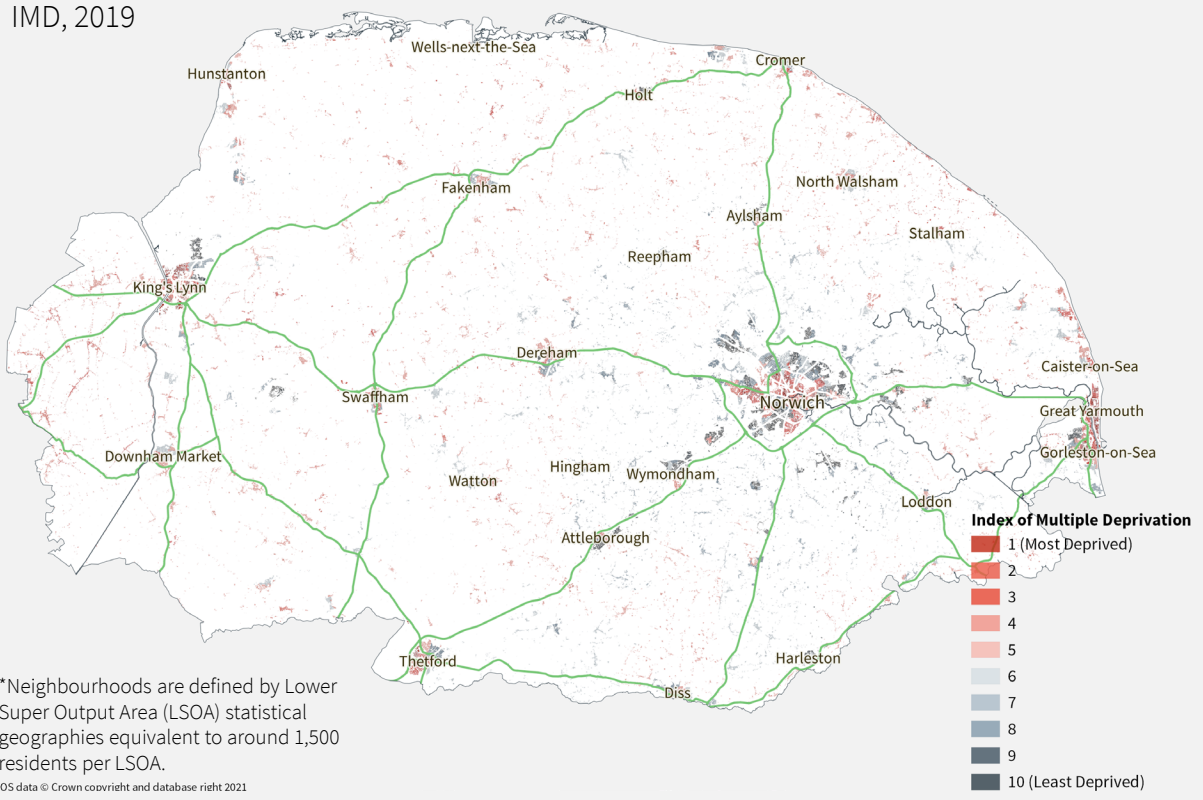
Norfolk's deprivation

Norfolk's deprivation is widespread with particular challenges in education and skills...

Norfolk is particularly deprived in terms of Education, Skills and Training, with 39% of all neighbourhoods* in Norfolk falling within the top 30% most deprived neighbourhoods nationally. Norfolk also faces challenges in deprivation related to Barriers to Housing and Services (34%) and Living Environment (32%).

Mapping of the Index of Multiple Deprivation demonstrates that Norfolk's deprivation is most concentrated in Norwich and some of its major towns, including Great Yarmouth, King's Lynn and Thetford. Norfolk's rural areas also face challenges relating to deprivation.

IMD, 2019

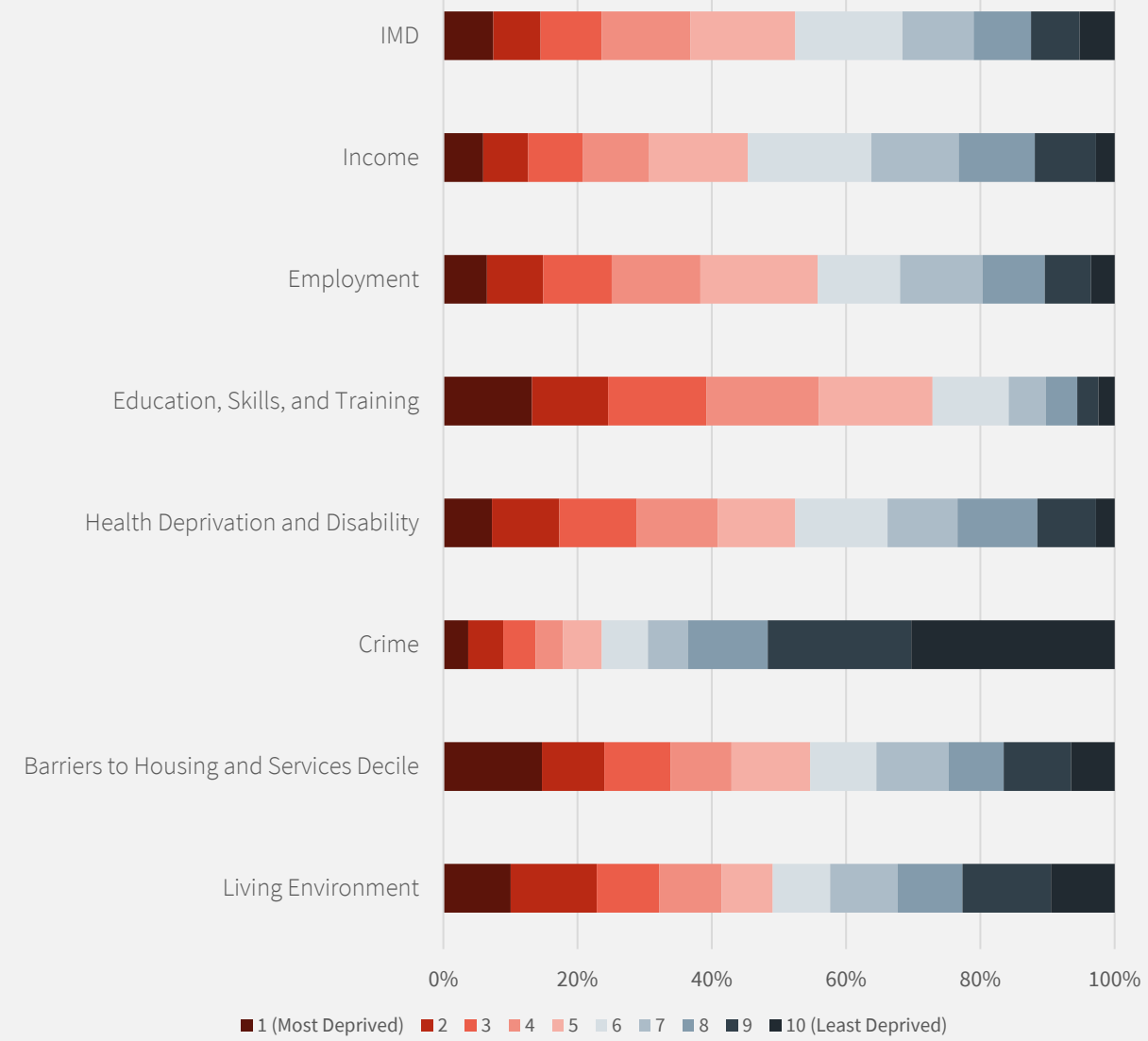


*Neighbourhoods are defined by Lower Super Output Area (LSOA) statistical geographies equivalent to around 1,500 residents per LSOA.

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Source: Index of Multiple Deprivation, MHCLG (2019)

Percentage of Norfolk neighbourhoods in each Index of Multiple Deprivation domain ranking, 2019.





Norfolk's diversity and immigration

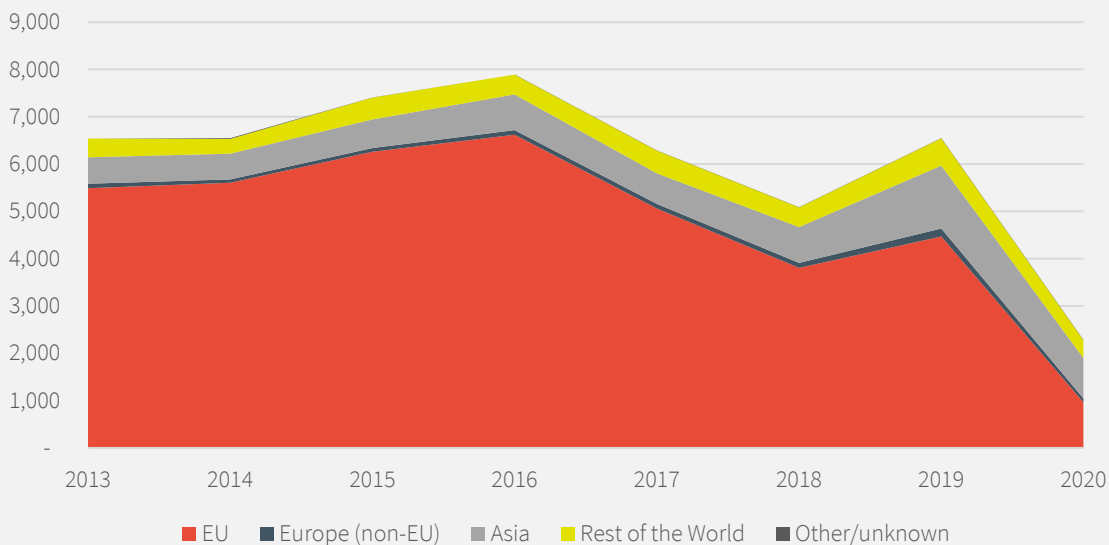
Inward migration is an important part of Norfolk's economy, but numbers have fallen since 2020...

Between 2013 and 2020, Norfolk hosted 48,500 economic migrants*. Of these, 15,500 (or 32%) were hosted in Norwich, followed by King's Lynn and West Norfolk (19%) and Breckland (18%).

EU migration in Norfolk accounted for around 38,300 migrants over this period which is equivalent to 79% of total NINO registrations. This is higher than the UK average over this same period (69%).

Change in EU NINO registrations in Norfolk between 2019 and 2020 demonstrates a sharp decline of around 3,500 registrations (-78%) which is greater than the UK average (-75%)

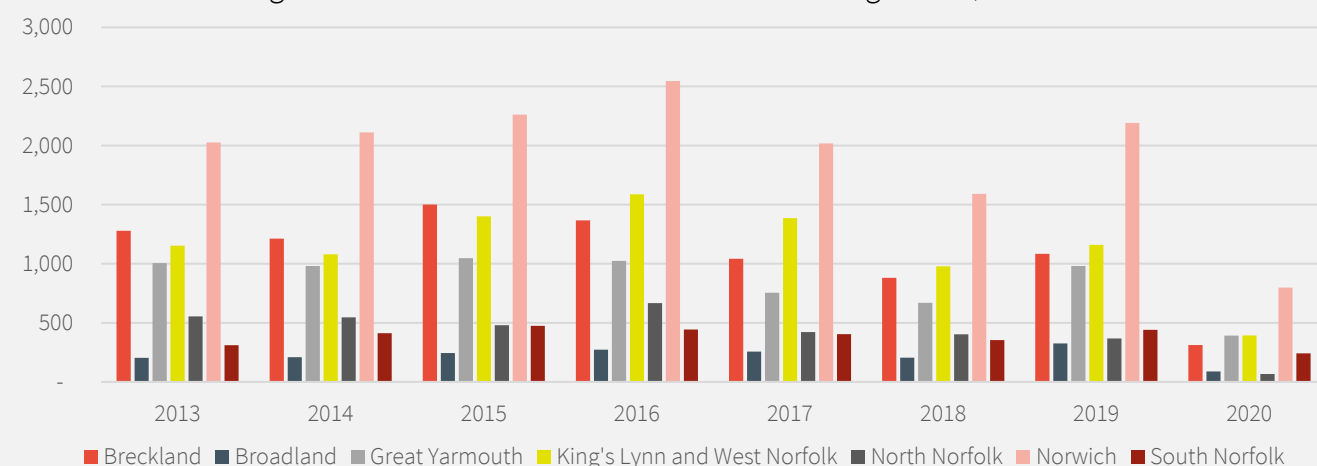
Total NINO Registrations to Adult Overseas Nationals entering the UK, 2013-2020



Country of birth, 2011

	United Kingdom	Ireland	Other Europe	Africa	Middle East and Asia	The Americas and the Caribbean	Antarctica, Oceania (including Australasia) and other
Breckland	91%	0%	5%	1%	1%	1%	0%
Broadland	96%	0%	2%	1%	1%	0%	0%
Great Yarmouth	93%	0%	4%	1%	1%	0%	0%
King's Lynn and West Norfolk	92%	0%	4%	1%	1%	1%	0%
North Norfolk	96%	0%	2%	1%	1%	0%	0%
Norwich	87%	1%	5%	2%	4%	1%	0%
South Norfolk	95%	0%	2%	1%	1%	1%	0%
Norfolk	93%	0%	3%	1%	2%	1%	0%
East of England	89%	1%	4%	2%	3%	1%	0%
England	86%	1%	4%	2%	5%	1%	0%

Total NINO Registrations to Adult Overseas Nationals entering the UK, 2013-2020



Source: Census 2011, ONS (2021); NINO Registrations, StatXplore (2021). *Note: economic migrants refer only to those with a National Insurance number registered during this period.



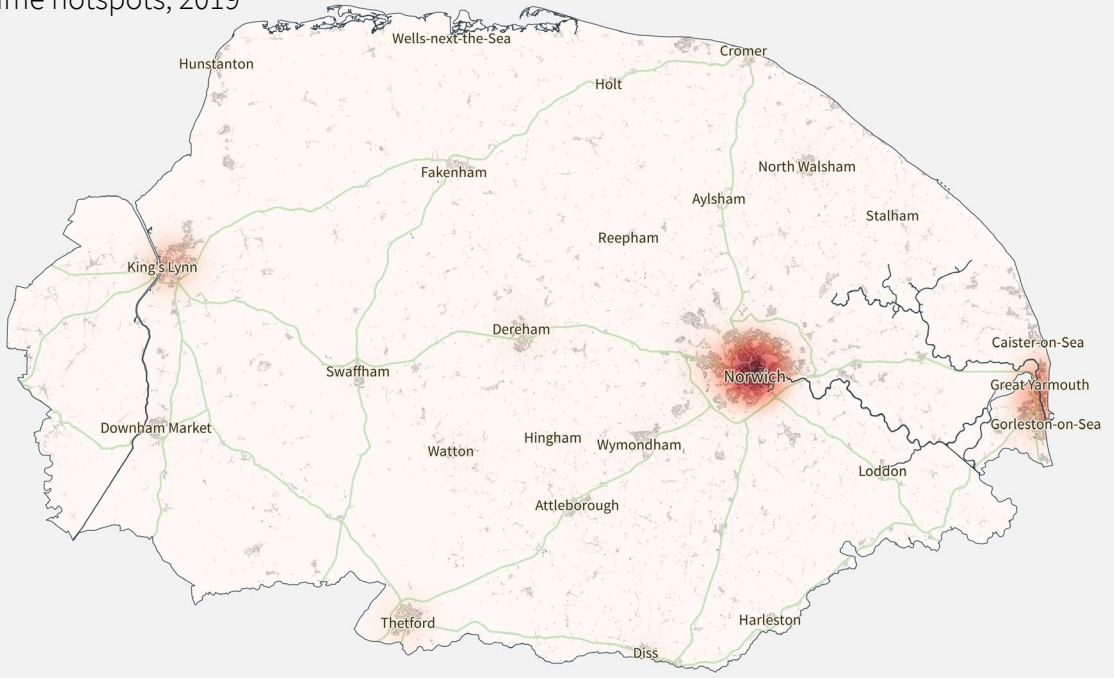
Norfolk's crime rates

Norfolk has a low overall crime rate, but challenges are concentrated in its main urban conurbations...

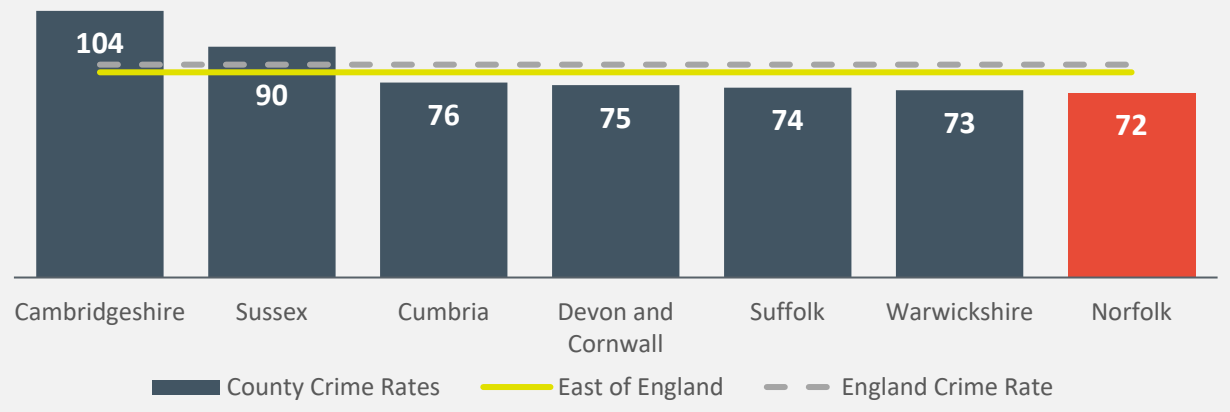
In 2019, Norfolk's crime rate of 72 crimes per 1,000 residents is notably lower than the East of England (80) and England (83) average.

Over this same period, Norwich had the highest crime rate (147) followed by Great Yarmouth (122) with the map below showing concentrations of crimes committed within these urban areas. All other districts in Norfolk had crime rates below the East of England and England averages.

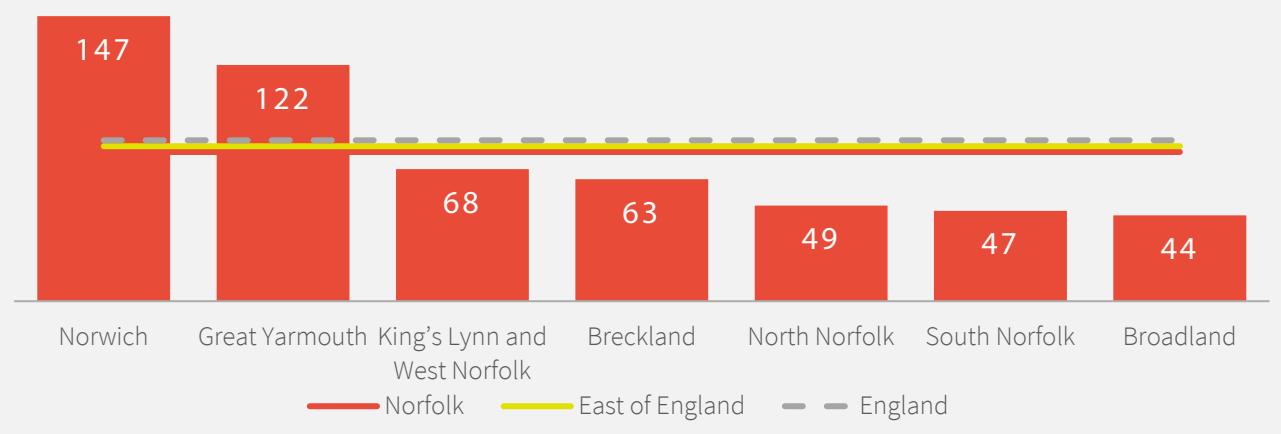
Crime hotspots, 2019



Crime rate per 1,000 population, 2019



Crime rate per 1,000 population, 2019



Source: Police Force Area Tables, ONS (2019)

1.5

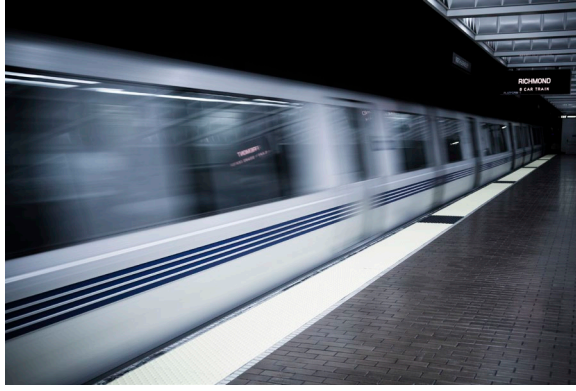
Norfolk's Places



Place: Evidence Summary



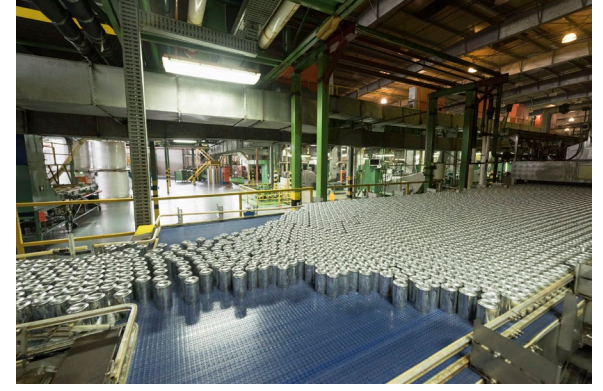
House prices are relatively low
Median house prices are **£240k** which is below the national average (c£250k)



Public transport could be better
E.g., Swaffham is accessible to 259k people by car within 45 minutes but only **8k** by public transport



Crime rates are low
There are **72** crimes per 1,000 people vs 82 at the national level, and 104 and 90 in places like Cambridgeshire and East Sussex



Commercial Property availability is limited
Light industrial, industrial and office vacancy rates are low (**<2%**, **<6%** and **<2%**)



Commercial property is poor quality
Only **2%** of industrial, **7%** of light industrial and **6%** of office space is Grade A and B vs 11%, 3% and 29% nationally



Most places are digitally connected
Only **1%** of premises are below the Universal Service Obligation and 93% have access to superfast broadband



Ultrafast connectivity is limited
Only 30% of premises have access to ultrafast broadband vs 60% at the national level



Water and electricity supply is a constraint
This is limiting housing, commercial and business investment in the county



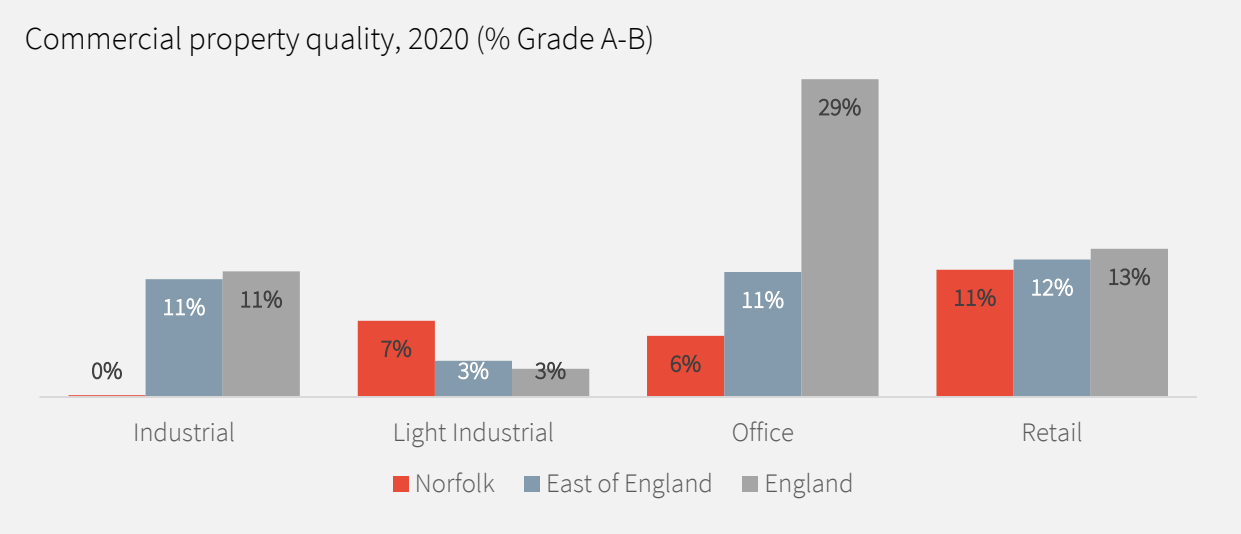
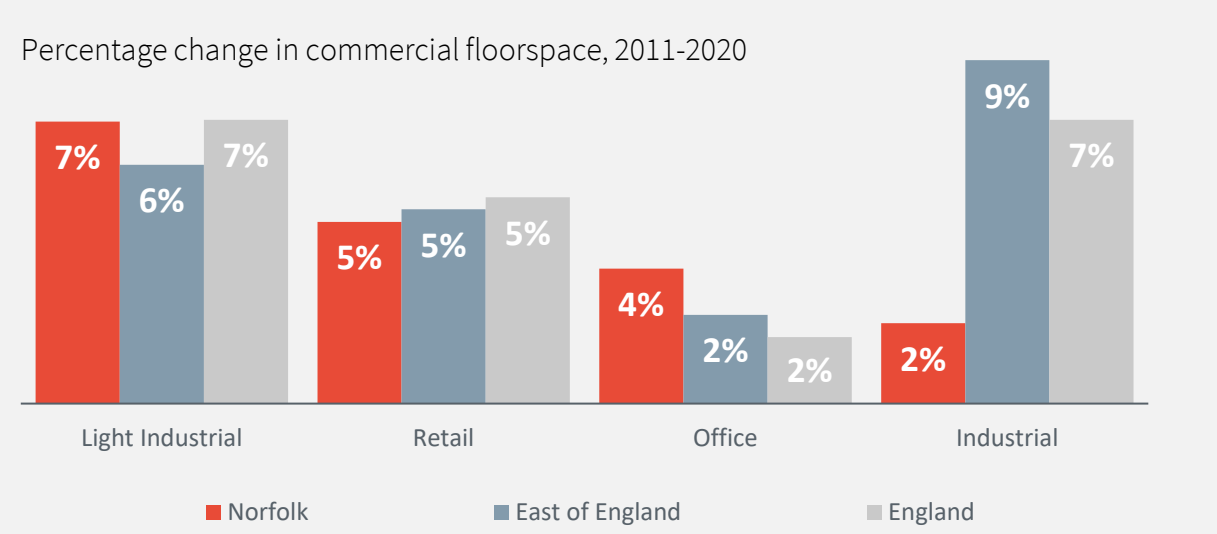
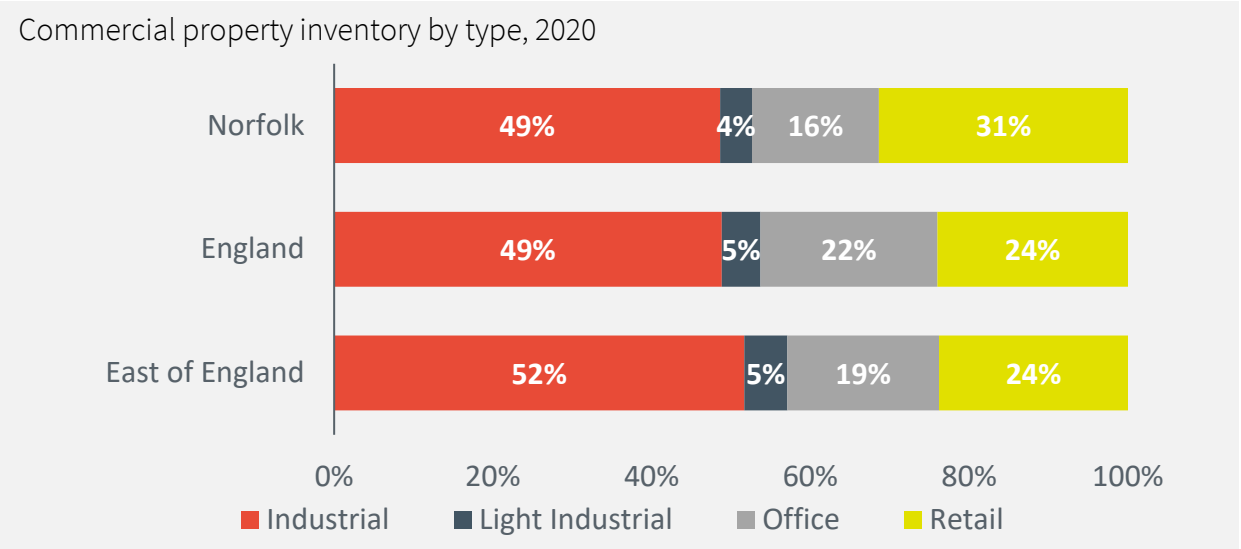
Norfolk's commercial property

Large commercial property footprint dominated by low quality space...

There is around 54 million sq ft of commercial floorspace within Norfolk, which is comprised of:

- 26,400,000 sq ft industrial
- 17,000,000 sq ft retail
- 8,700,000 sq ft office
- 2,200,000 sq ft light industrial

Light industrial and retail floorspace have experienced the strongest growth since 2011 with the former expanding from a small base. With the exception of light industrial, Norfolk's commercial property stock offers far lower proportions of high quality floorspace than both the East of England and England averages.



Source: CoStar, Commercial Property Analytics (2021)



Norfolk's commercial property: industrial

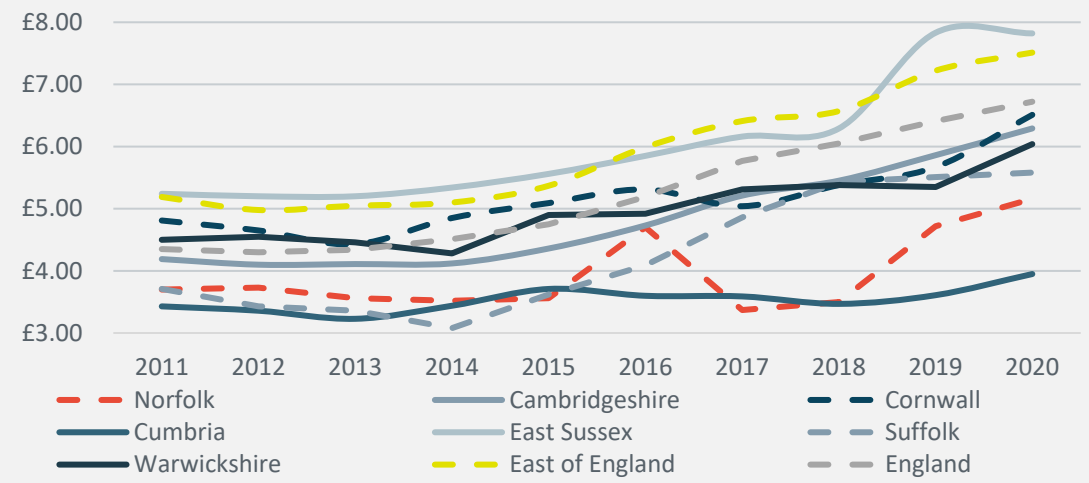
Slight increase in industrial vacancy rates and rents...

The vacancy rates of industrial properties in Norfolk have historically been lower than across the East of England and England. Despite this, rates increased since 2018 to stand at 6% in 2020 which was above the average for the East of England (4%) and England (3%).

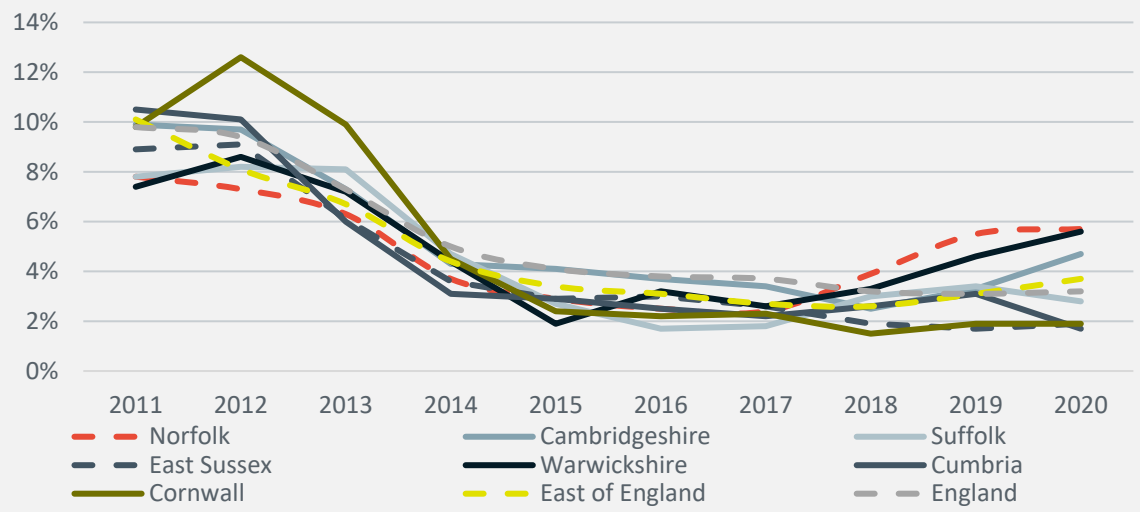
The rent per sq ft of industrial space is well below regional and national comparators. In 2020, the rent per sq ft of industrial space was £5.16 which is just 69% of the price of the East of England average (£7.51). Rents have however increased over the last ten years by around 35%.

The quality of industrial property in Norfolk will influence this low value, as well as other factors such as location and public transport connectivity. In 2020, just 0.2% of industrial property in the country was classified as Grade A-B, which is considerably lower than both the English and East of England averages of 11%. All the vacant industrial space is older and lower-quality space which is in low demand versus higher-quality units.

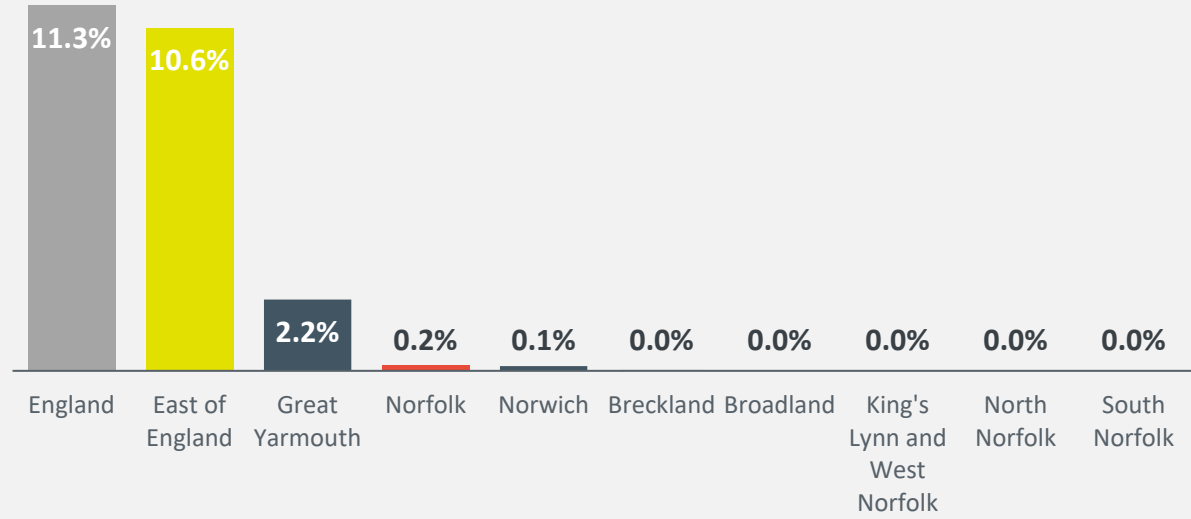
Industrial property rent per sq ft, 2011-2020



Industrial property vacancy rates, 2011-2020



Industrial property quality, by District, 2020 (% Grade A-B)



Source: CoStar, Commercial Property Analytics (2021) *No difference in area type between dashed and solid lines.



Norfolk's commercial property: light industrial

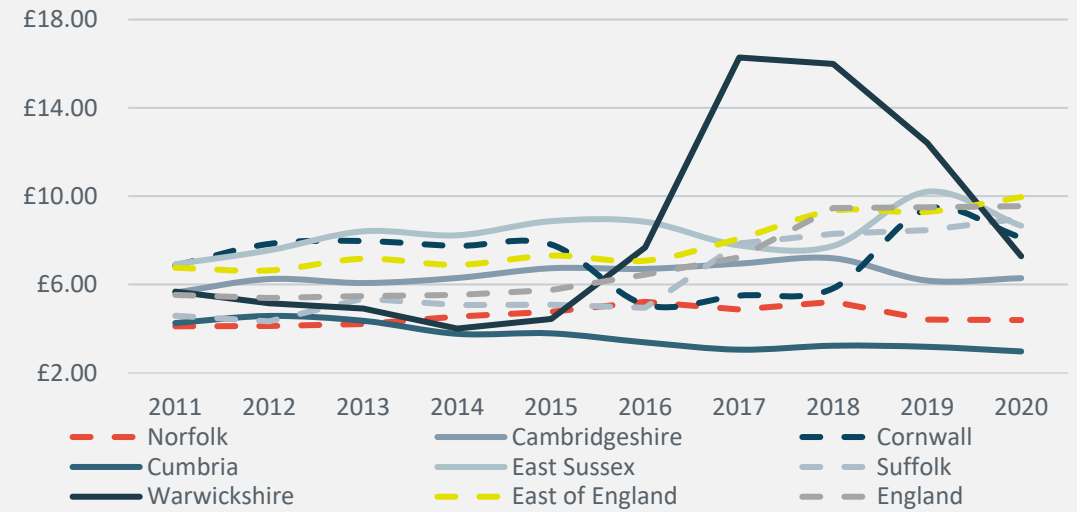
Light industrial space is fully occupied...

Norfolk's light industrial vacancy rates have decreased from 10% in 2011 to just 2%, which reflects trends at the East of England and England Levels.

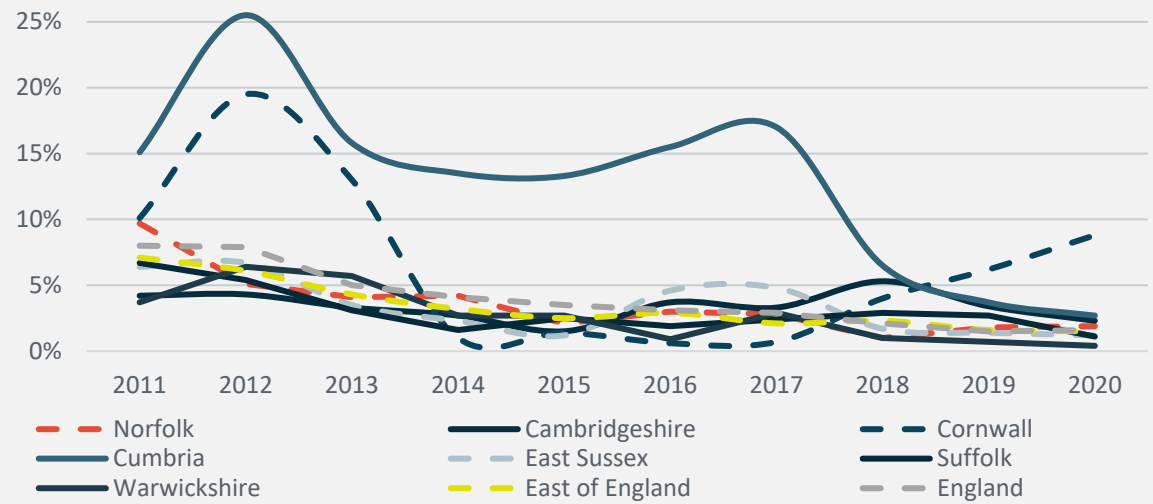
The quality of Norfolk's light industrial stock is higher than the English and East of England averages - in 2020 7% was Grade A-B versus 3% at the East of England and England levels. This is being driven by South Norfolk (which is home to Hethel Engineering Centre) where 59% of light industrial property is Grade A-B.

Light industrial rents per sq ft have remained fairly constant over the last decade rising by only 28p from £4.11 per sq ft in 2011 to £4.39 per sq ft in 2020. This is roughly half of both the English (£9.55 in 2020) and the East of England averages (£9.96 in 2020).

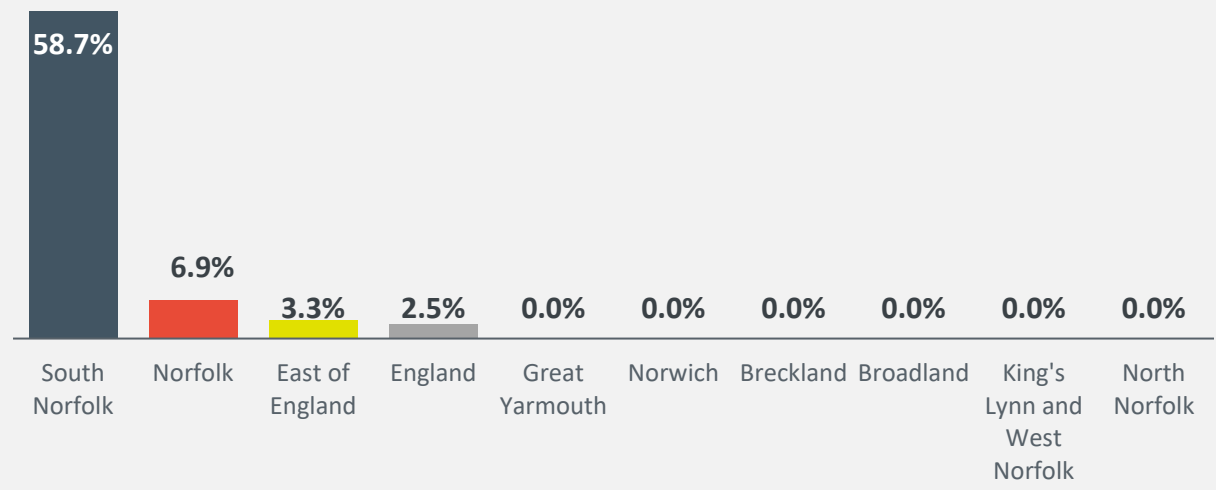
Light industrial property rent per sq ft, 2011-2020



Light industrial property vacancy rates, 2011-2020



Light industrial property quality, by District, 2020 (% Grade A-B)



Source: CoStar, Commercial Property Analytics (2021) *No difference in area type between dashed and solid lines.



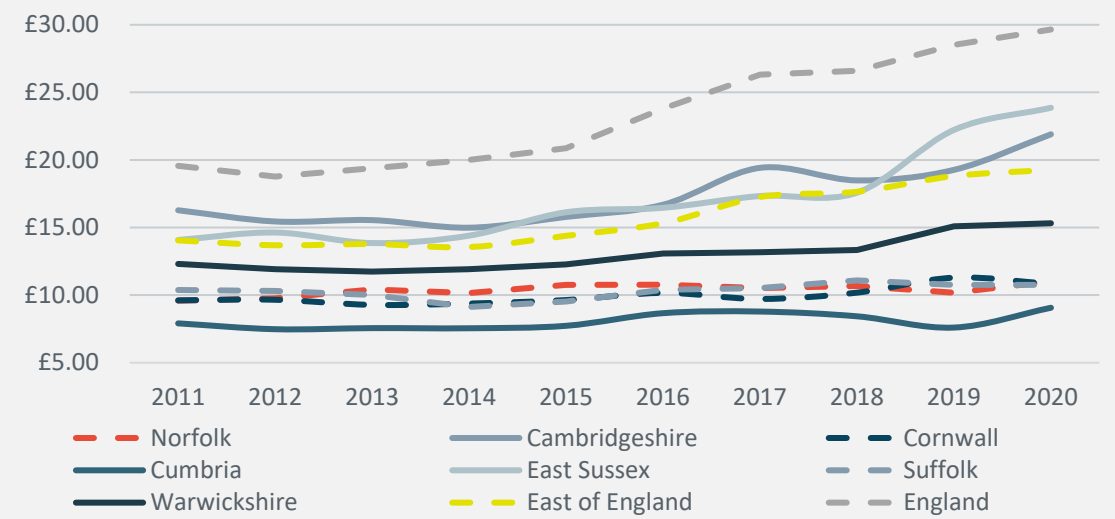
Norfolk's commercial property: office

Office stock remains occupied...

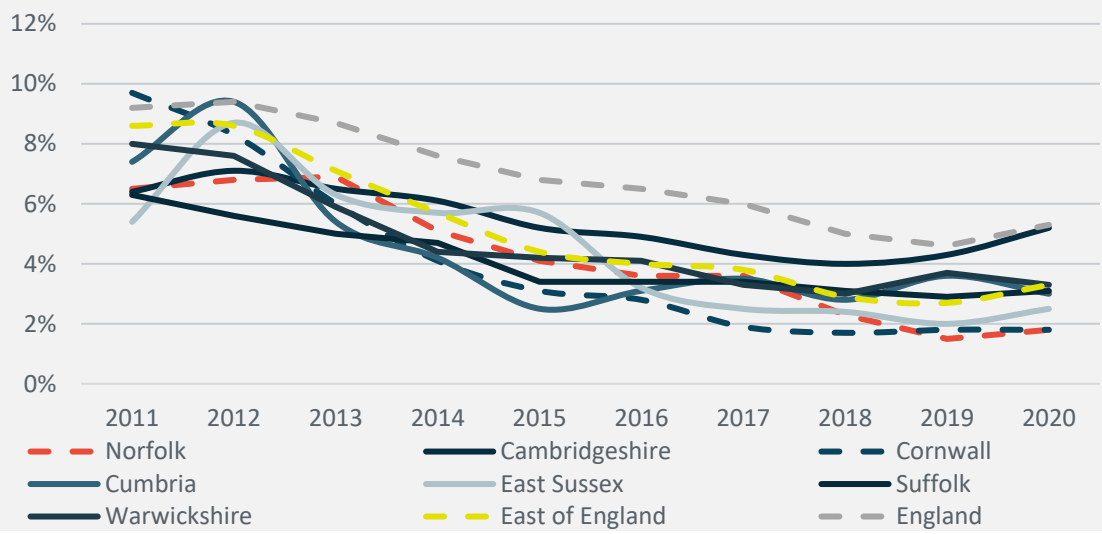
Norfolk's office vacancy rates have decreased from 7% in 2011 to just 2% in 2020. The East of England and England have seen a similar trends, but as of 2020 vacancy rates in these areas were higher than in Norfolk at 3% and 5% respectively. Office deals/transactions did fall in 2020/21 as a result of COVID-19 but occupancy remains relatively stable at present. This will need to be monitored carefully as more data becomes available.

Despite the low vacancy rates in Norfolk, office rent per sq ft has remained stagnant and below the English and East of England averages since 2011. As of 2020, the rent per sq ft in Norfolk was £11.02 (an increase of £1.44 since 2011), whereas in both East of England and England this figure was considerably higher at £19.02 and £29.65. The low rate may reflect the fact that only 6% of office property is Grade A-B versus 11% and 29% at the national levels.

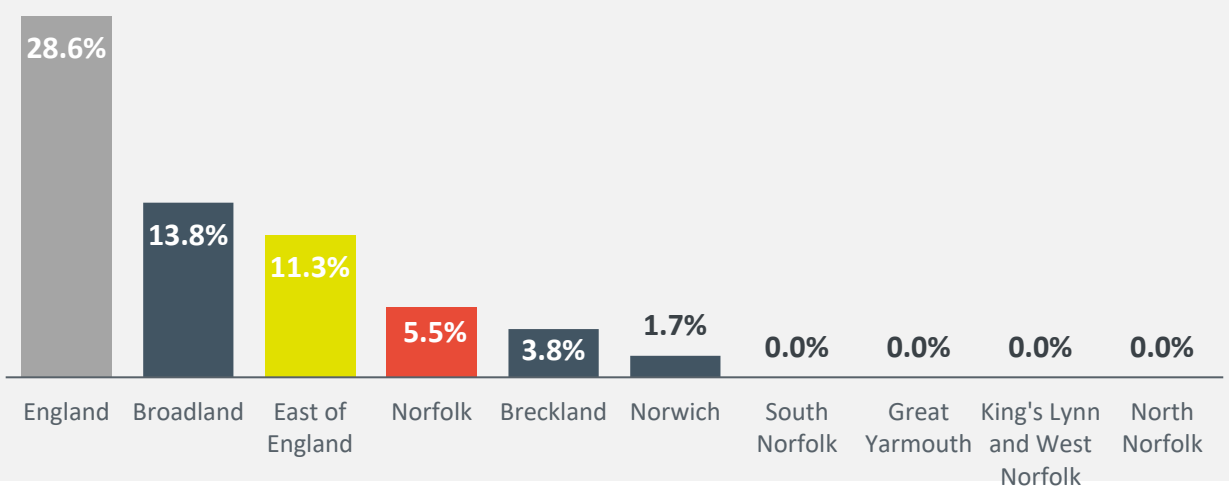
Office property rent per sq ft, 2011-2020



Office property vacancy rates, 2011-2020



Office property quality, by District, 2020 (% Grade A-B)



Source: CoStar, Commercial Property Analytics (2021) *No difference in area type between dashed and solid lines.

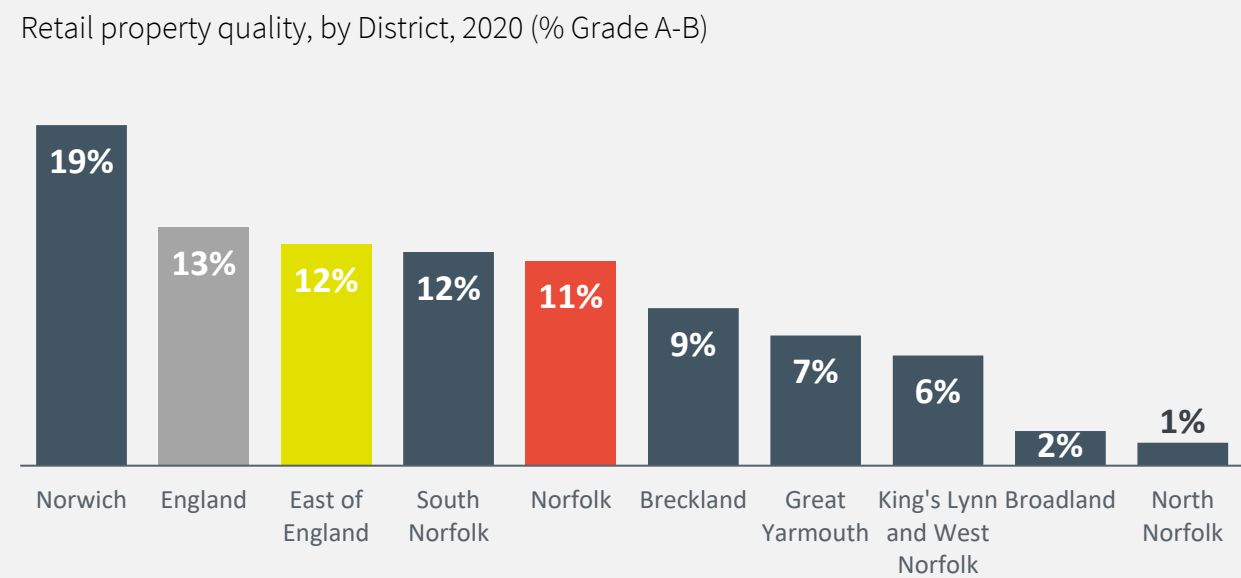
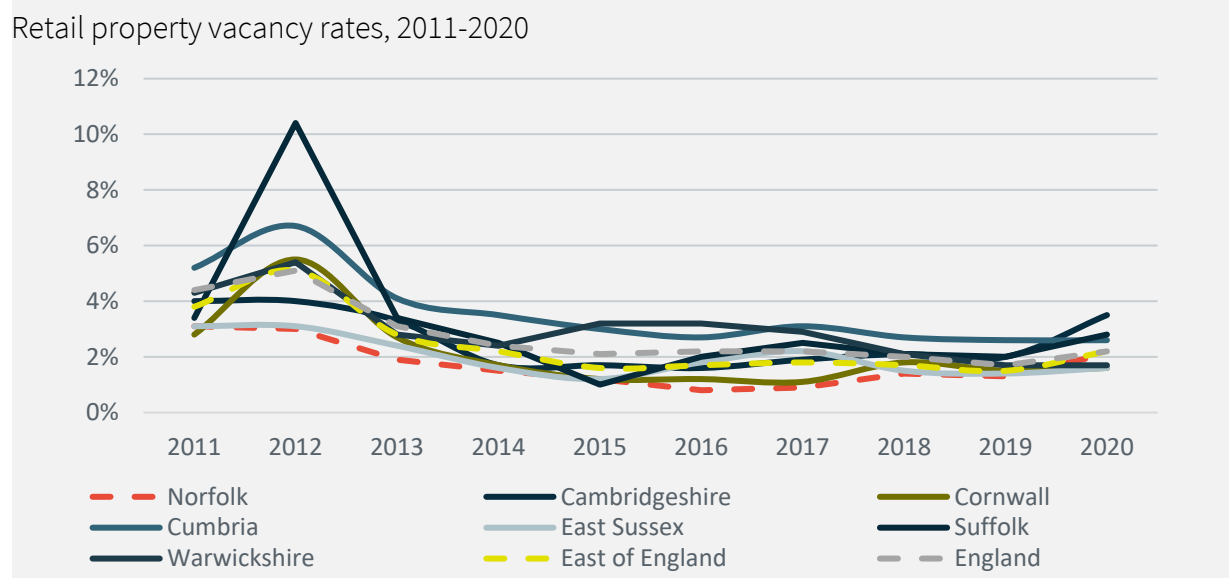
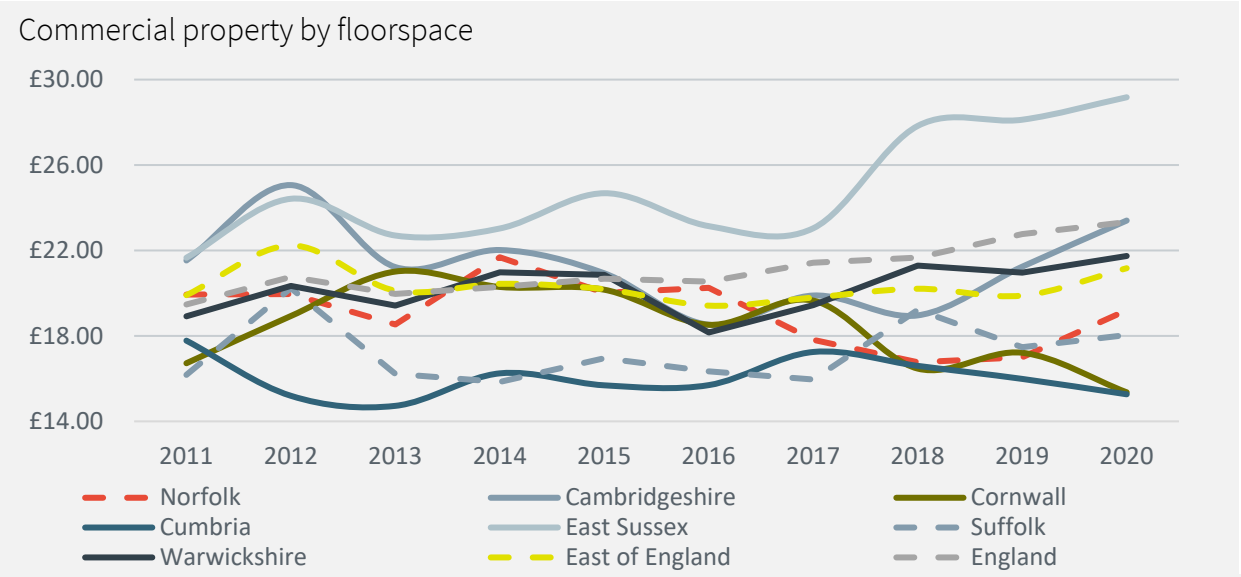


Norfolk's commercial property: retail

Retail occupancy remains relatively stable despite macro-economic pressures facing the retail market...

The vacancy rate of retail property in Norfolk has reduced from 3% in 2011 to 2% in 2020. In both the East of England and England, this trend is replicated, with vacancy rates in both areas falling from 4% in 2011 to 2% in 2020.

The quality of retail property in Norfolk is slightly below the English and East of England averages, with 11% of properties in Norfolk rated Grade A-B in 2020, compared to 12% in the East of England and 13% in England. Within Norfolk, Norwich has a relatively high proportion of high-quality retail units which reflects its relatively recent commercial developments.



Source: CoStar, Commercial Property Analytics (2021) *No difference in area type between dashed and solid lines.



Norfolk's housing

House prices in Norfolk are below the national average, but are not affordable...

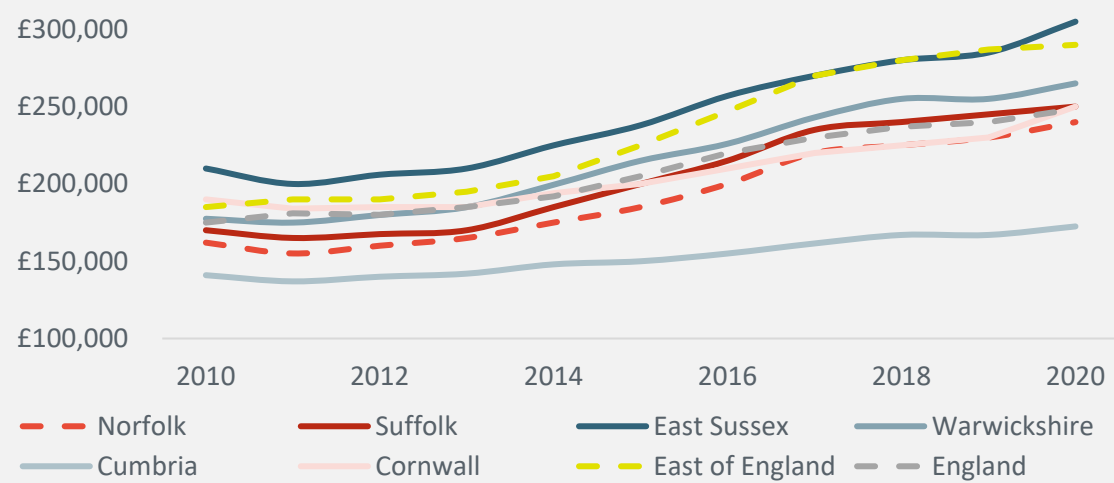
The median house price in Norfolk is £240k which is below the East of England (£290k) and England average (£250k).

The house price affordability ratio measures the (median) cost of house prices relative to (median) workplace-based earnings. House prices in Norfolk in 2020 were 8.2 times higher than the average salary. This is lower than the average for the East of England (9.4) but higher than the average for England (7.8).

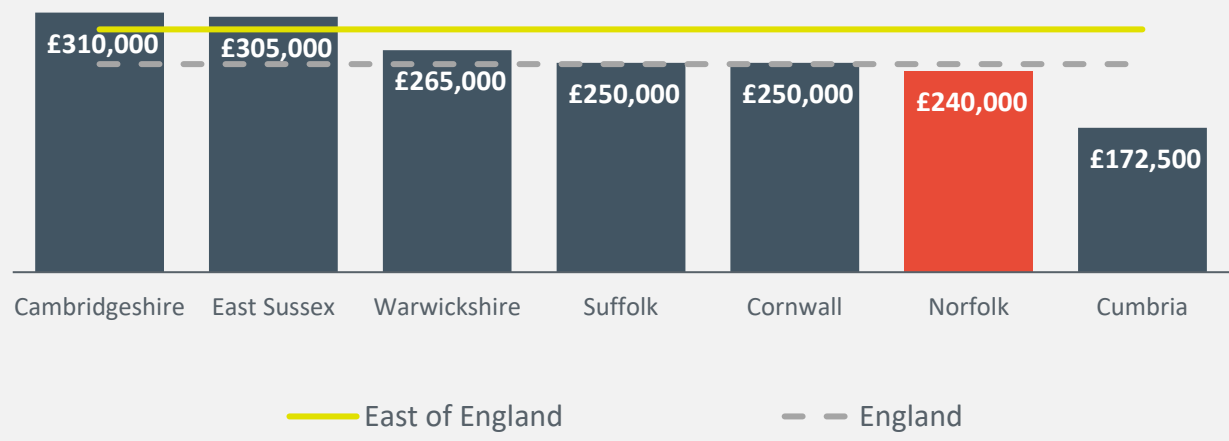
House prices in Norfolk have increased by 48% since 2010. This is lower than the house price growth seen across the East of England (57%) but higher than the level seen nationally (42%).

All seven districts in Norfolk have a geographical coverage of at least 99.9% for 4G outdoor operator signal. In Great Yarmouth, King's Lynn and West Norfolk and Norwich, 100% off the area has access to at least one 4G operator.

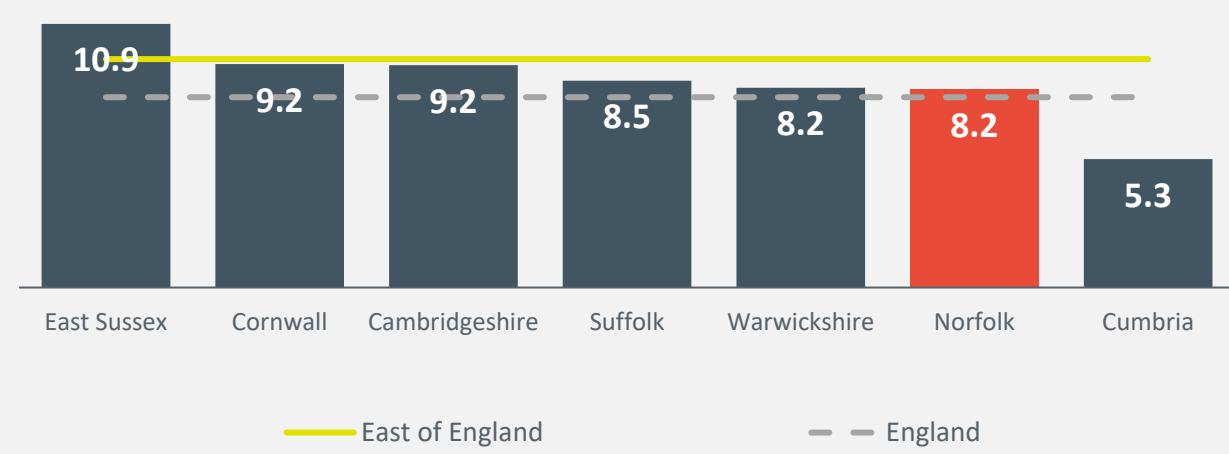
House price growth, 2010-2020



Median house price, 2020



Housing affordability ratio, 2020



Source: ONS, House Price Statistics for Small Areas (2020); ONS, House price to workplace-based earnings ratio (2020). *No difference in area type between dashed and solid lines.



Norfolk's functional geography

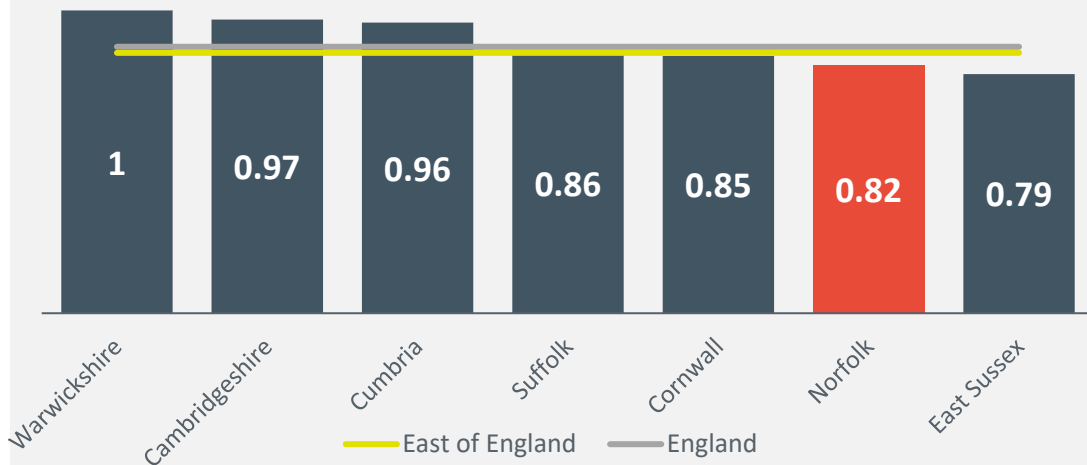
Norfolk is a net exporter of labour...

According to the most recently available data from the Census (2011), around 308,000 people commute into Norfolk for work. However, around 318,000 people commute out of the county, meaning that Norfolk has a net outflow of around 10,000 people. Approximately 3,200 people were recorded commuting into Greater London for work in the 2011 census data.

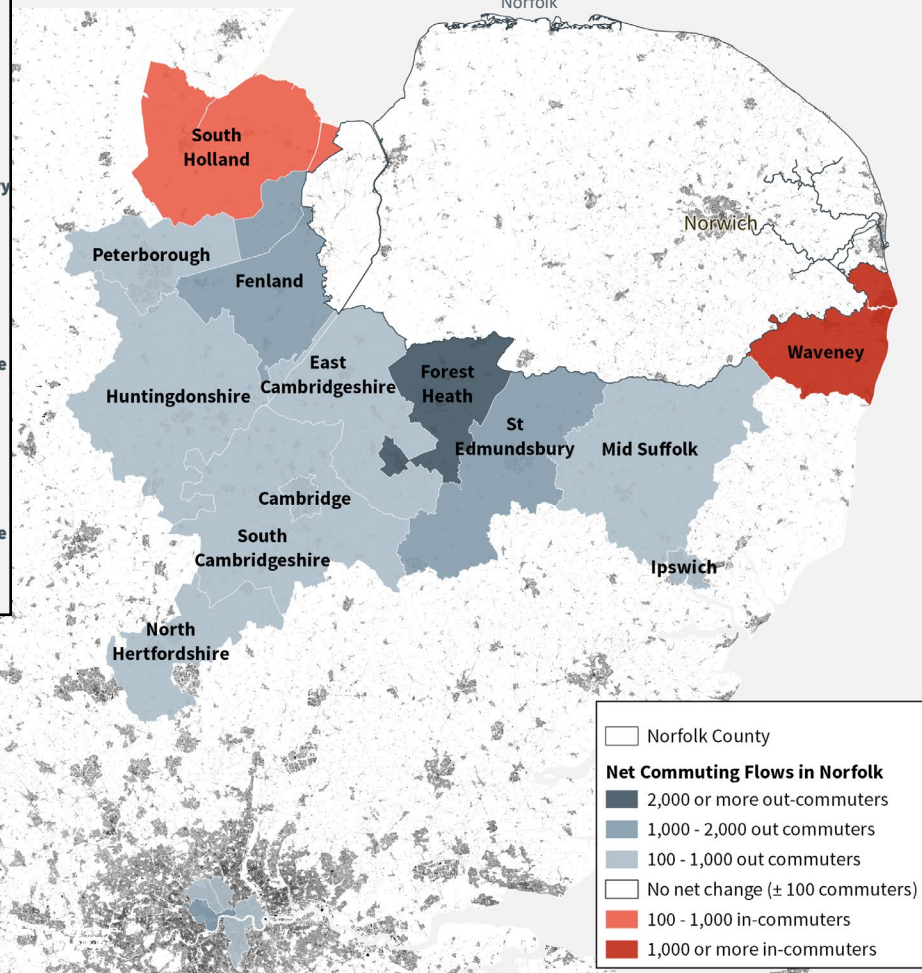
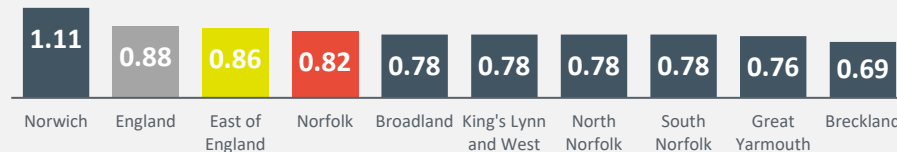
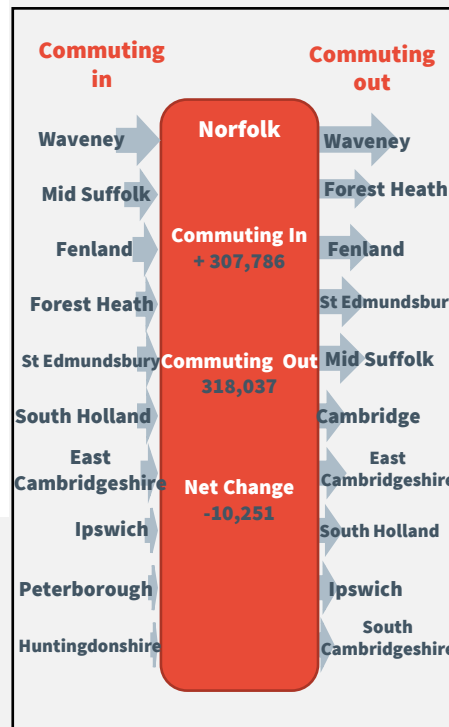
Jobs density refers to the number of jobs per resident of working age (aged 16-64). Norfolk's jobs density is 0.82, meaning that there are enough jobs within the county to provide work to 82% of working age residents. This is below both the East of England (0.86) and England (0.88) averages.

Within Norfolk, the highest concentration of jobs is in Norwich (jobs density 1.11) and lowest in Breckland (0.69).

Norfolk's job density at a district level, 2019



Norfolk's net commuting flows



OS data © Crown copyright and database right 2021



Norfolk's transport connectivity

Norfolk's public transport connectivity is limited outside of Norwich...

The maps below indicate the 45-minute travel time population catchment of Norfolk's major economic hubs. Norwich has the largest catchment with 425,000 people reached by car and 158,000 people by public transport.

Public transport connectivity within Norfolk's towns is limited. More than 10 times the number of people are able to reach Great Yarmouth by car compared to by public transport, with this figure rising to 31 times in Swaffham.

45-minute travel time catchments from Norfolk's key centres

Great Yarmouth

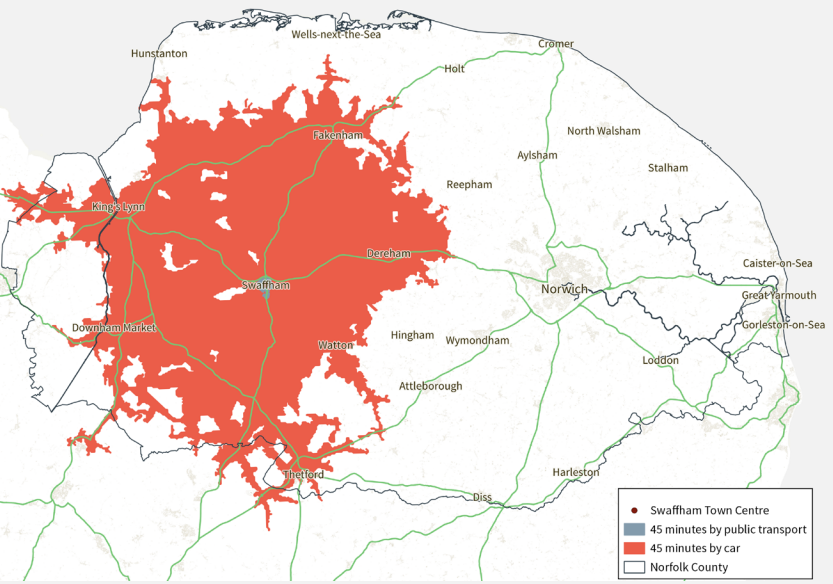
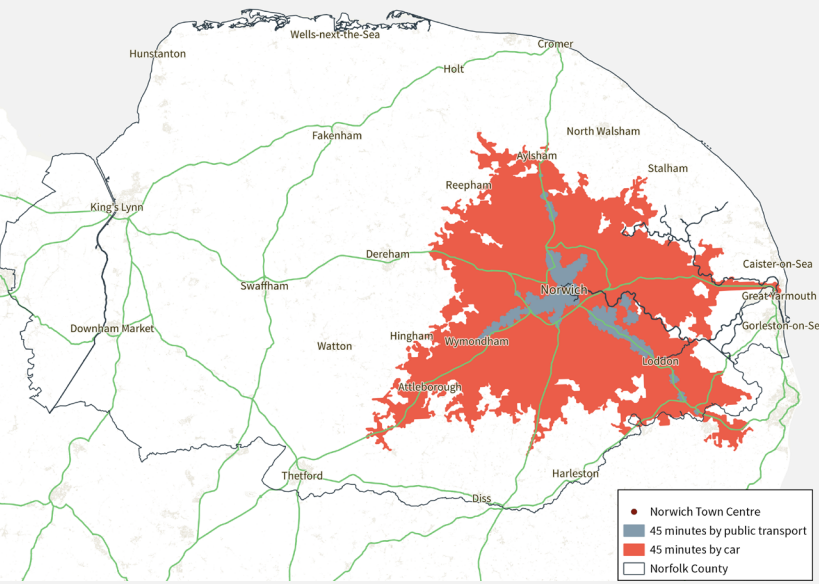
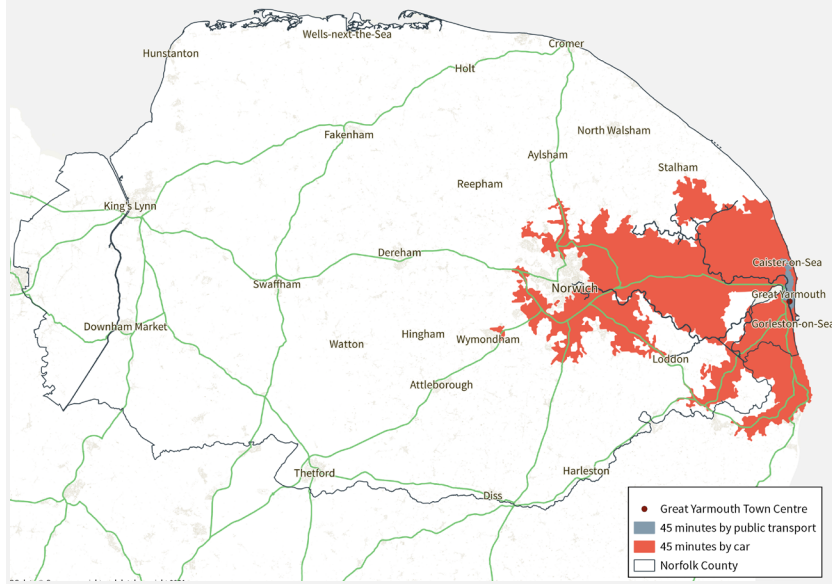
	Public Transport		Car
	Population: 33,000		Population: 280,000
	WAP: 20,000		WAP: 166,000

Norwich

	Public Transport		Car
	Population: 158,000		Population: 425,000
	WAP: 102,000		WAP: 262,000

Swaffham

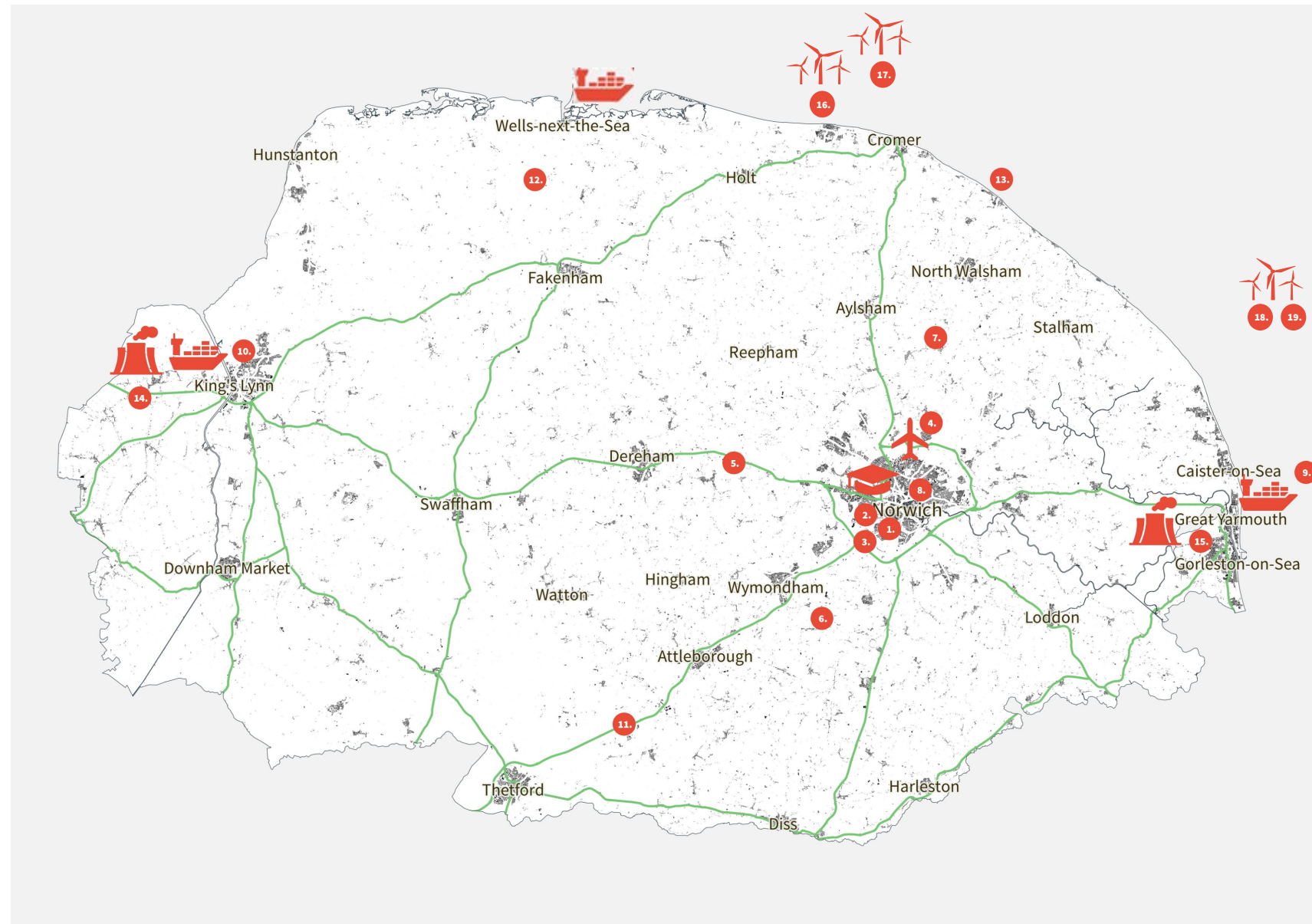
	Public Transport		Car
	Population: 8,300		Population: 259,000
	WAP: 4,200		WAP: 148,000



Source: iGeolise TravelTime plugin (2021); Mid-Year Population Estimates, ONS (2019). Note: travel time catchments are calculated based on a departure time from each centre at 10:00 27-10-2021.

Norfolk's infrastructure assets

1. University of East Anglia
2. Norwich Research Park
3. Norfolk and Norwich University Hospital
4. Norwich Airport
5. Food Enterprise Park
6. Hethel Engineering Centre
7. Scottow Enterprise Park
8. City College Norwich
9. Great Yarmouth Port
10. King's Lynn Port
11. Snetterton Business Park
12. Egmere Business Hub
13. Bacton Gas Terminal
14. King's Lynn Power Station
15. Great Yarmouth Power Station
16. Sheringham Shoal Offshore Wind Farm
17. Dudgeon Offshore Wind Farm
18. Proposed Norfolk Vanguard Offshore Wind Farm
19. Proposed Norfolk Boreas Offshore Wind Farm





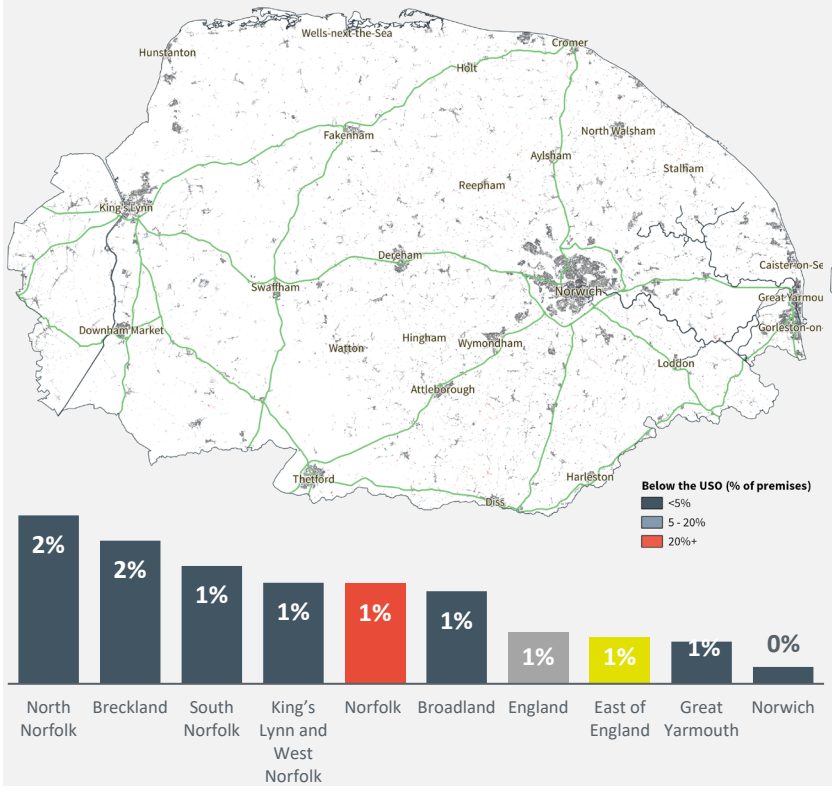
Norfolk's digital connectivity

Norfolk is well connected in terms of broadband...

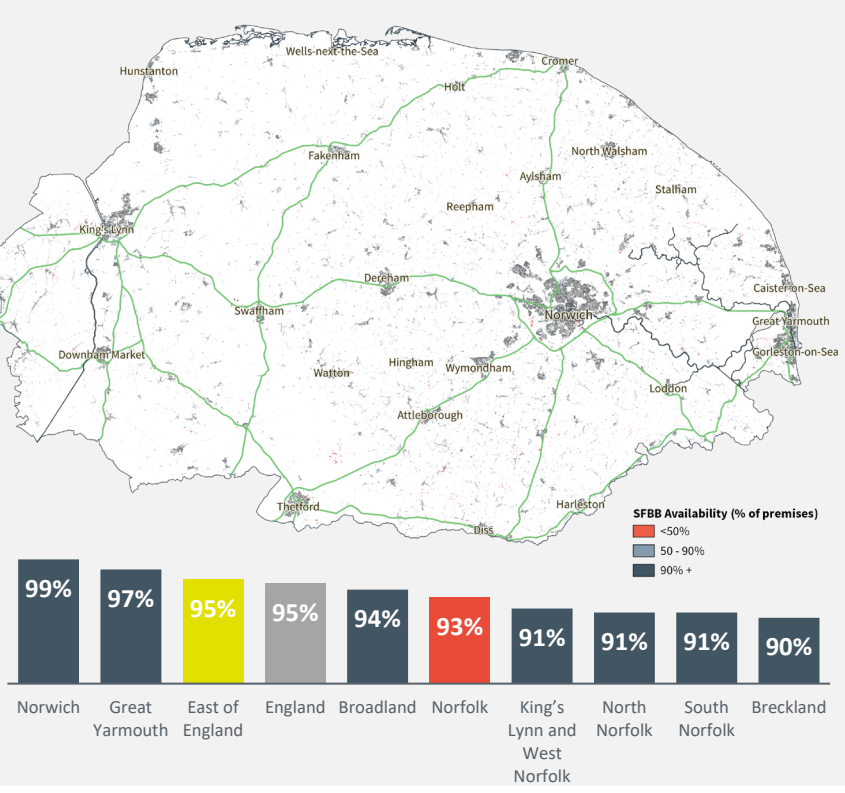
Only 1% of premises in Norfolk are below the Universal Service Obligation* for broadband. 93% of premises can access Superfast broadband (equivalent to >30 Mbps download speed) which is slightly below the level for the East of England (95%) and England (95%).

Despite a good level of broadband accessibility, only 30% of premises in Norfolk can access the highest broadband speeds provided by Ultrafast broadband (>300 Mbps) which is lower than both the East of England (55%) and England (60%). Gigabit broadband is currently available in 63% of UK premises, compared to only 5% of premises in Great Yarmouth, King's Lynn and West Norfolk and North Norfolk (Norfolk's worst performing districts) and 22% in Breckland (Norfolk's best performing district).

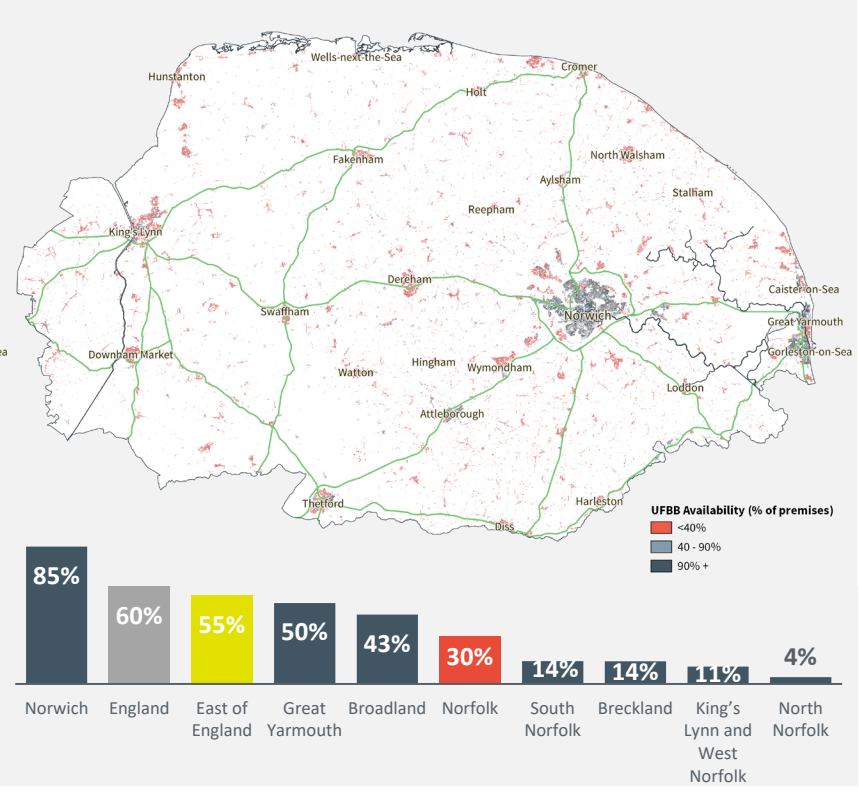
Below the Universal Service Obligation (USO)



Superfast Broadband



Ultrafast Broadband



Source: Connect Nations, Ofcom, (2020). Note: the Universal Service Obligation (USO) for broadband is equivalent to a download speed of at least 10 Mbps and upload speed of 1 Mbps.



Norfolk's Visitor Economy

Norfolk has a large and broad tourism offer...

Norfolk's Visitor Economy was worth **£3.42bn** in 2019



Accommodation & food services



Retail



Transport & storage



Arts, entertainment, recreation and other services



Information & communication

Potential growth markets include:

- **Experiential tourism:** 37% of domestic visitors choose a destination because of the experiences it offers (VisitEngland, 2019)
- **Off-season:** Rural tourism businesses report 10-15% of demand in January to March, 25-30% April to June, 30-50% July to September and 15-20% October to December. Similar patterns are observed in important coastal resorts, including Great Yarmouth
- **Sustainable tourism:** Sustrans estimates that leisure and tourism cycling on the National Cycle Network contributes £650m a year to the UK economy and supports over 15,000 jobs ([Economic impact of the National Cycle Network](#)). A Department for Transport study found that cycle tourists spend around 9% more per trip than the average visitor, with the average cycling spend being £81 per trip.
- **Cultural tourism:** The cultural sector of Norfolk and Suffolk contributed £272 million in GVA in 2018 and grew by 16% since 2015. (Source: [Culture Drives Impact Manifesto](#), 2022, for the New Anglia LEP Culture Board)

Sources: Business Register and Employment Survey, ONS (2020); Think Night: London's Neighbourhoods from 6pm to 6am, London Night Time Commission (2019); The Value of Cycling, Department for Transport, Rajé, F. & Saffrey, 2016; Designing and Marketing Low Season Tourism Experiences by Prof. Xavier Font, Jean-Moussa Lucas and David Cloarec for the EXPERIENCE project, funded by INTERREG

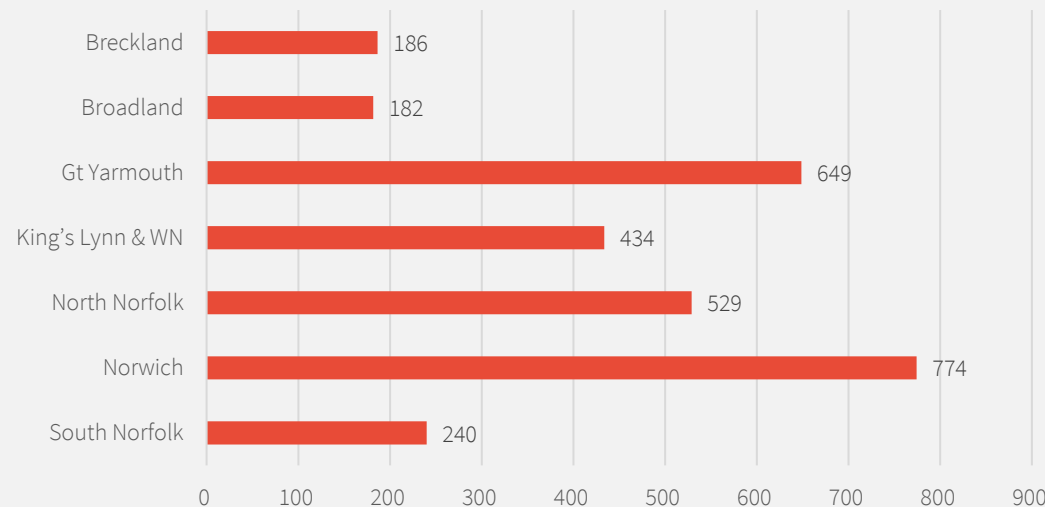
Tourism related employment, 2019

Tourism-related employment:

- 69,000 jobs, equivalent to 52,000 full time jobs
- Tourism as a percentage of all employment: 19.5%
- Total staying trips: 3,164,000
- Total staying nights: 12,642,000
- Total day trips: 48,835,000

Source: Destination Research, Economic Impact of Tourism 2019 – figures are for all Norfolk

Total Tourism Value by District (£m), 2019





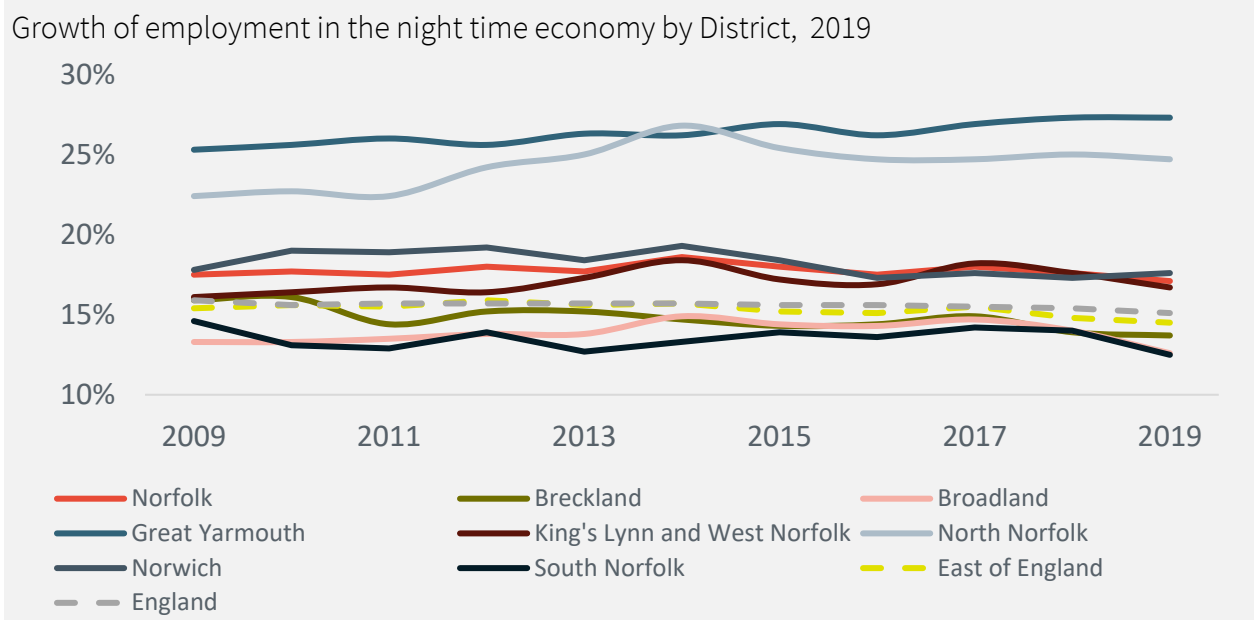
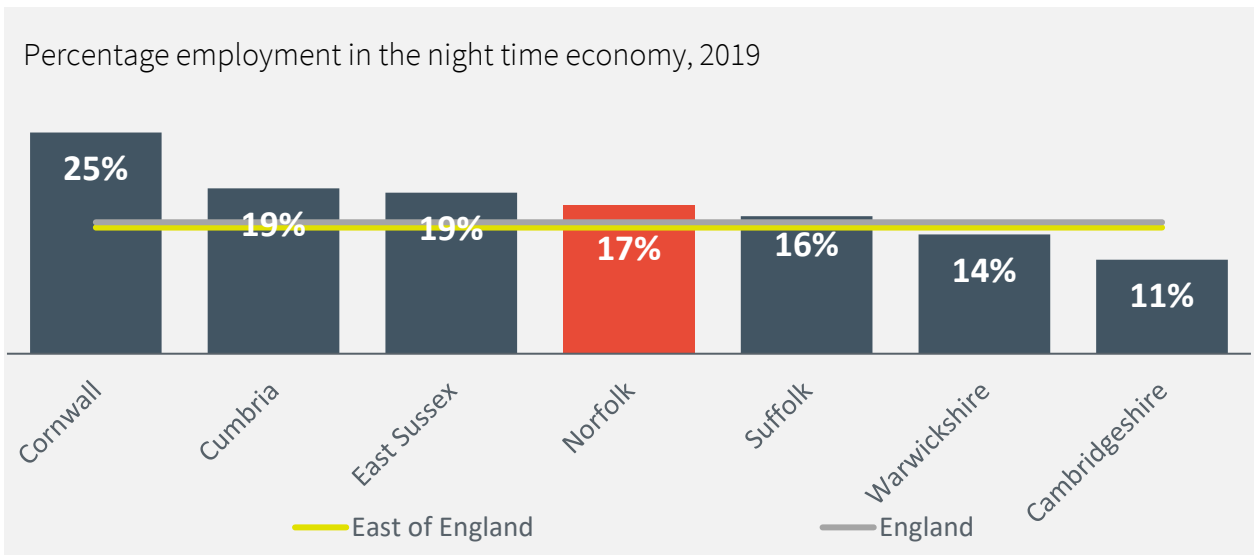
Norfolk's night time economy

Norfolk's employment in the night time economy is significant particularly for Great Yarmouth and North Norfolk...

The night time economy is defined as all activity that operates between 6pm and 6am. There are four types of night time activity as defined by the Greater London Authority's Night Time Economy Data and Research Group:

- + Culture and Leisure Activities (hotels, restaurants, pubs, creative, arts, sports etc. and occupations that support them)
- + Activities that Support Night Time Cultural and Leisure Activities (retail, passenger transport etc and occupations that support them)
- + 24-Hour Health and Personal Services (hospitals, residential care etc. and occupations that support them)
- + Activities that support wider economic and social activities (e.g. manufacturing, warehousing, books, motion pictures, music publishing etc. and occupations that support them)

Norfolk has a higher proportion of employment within the night time economy (17% of all jobs) compared to the East of England (15%) and England (15%). Within Norfolk, the night time economy contributes most significantly to employment in Great Yarmouth (27%) and North Norfolk (25%).



Source: Business Register and Employment Survey, ONS (2020); Think Night: London's Neighbourhoods from 6pm to 6am, London Night Time Commission (2019).

*No difference in area type between dashed and solid lines.



Norfolk's living environment

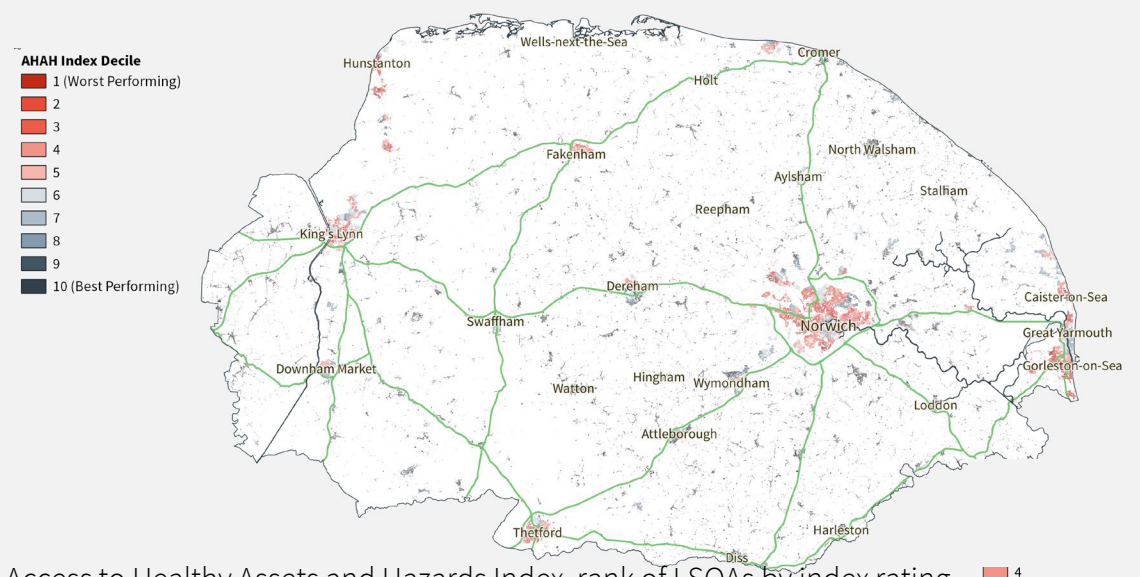
Norfolk performs poorly across a range of healthy living environment indicators, with these challenges concentrated in urban areas...

The Access to Healthy Assets and Hazards Index (AHAH) ranks neighbourhoods* according to their performance across a range of measures related to 'healthy' neighbourhoods and the quality of the living environment. The four domains that comprise the index are:

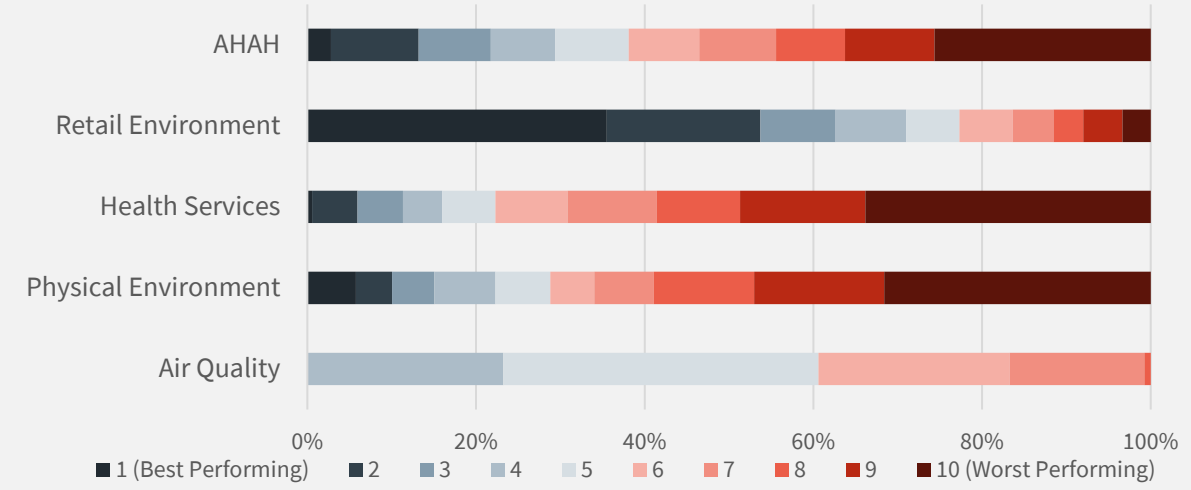
- + Retail environment (access to fast food outlets, pubs, off-licences, tobacconists, gambling outlets),
- + Health services (access to GPs, hospitals, pharmacies, dentists, leisure services),
- + Physical environment (Blue Space, Green Space - Active, Green Space - Passive), and
- + Air quality (Nitrogen Dioxide, Particulate Matter 10, Sulphur Dioxide).

Measured by the AHAH index 26% of Norfolk's neighbourhoods fall within the top 10% worst performing nationally. Broken down by domain, the proportion of neighbourhoods in Norfolk ranked within the top 10% worst performing nationally is particularly high for health services (34%) and the physical environment (32%). These factors are more likely to be a challenge for Norwich and other large towns in Norfolk such as Thetford, Great Yarmouth and King's Lynn.

Overall Access to Healthy Assets and Hazards Index



Access to Healthy Assets and Hazards Index, rank of LSOAs by index rating



Source: Access to Healthy Assets and Hazards Index, CRDC (2020) *Note: Neighbourhoods are defined by Lower Super Output Area (LSOA) statistical geographies equivalent to around 1,500 residents per LSOA.

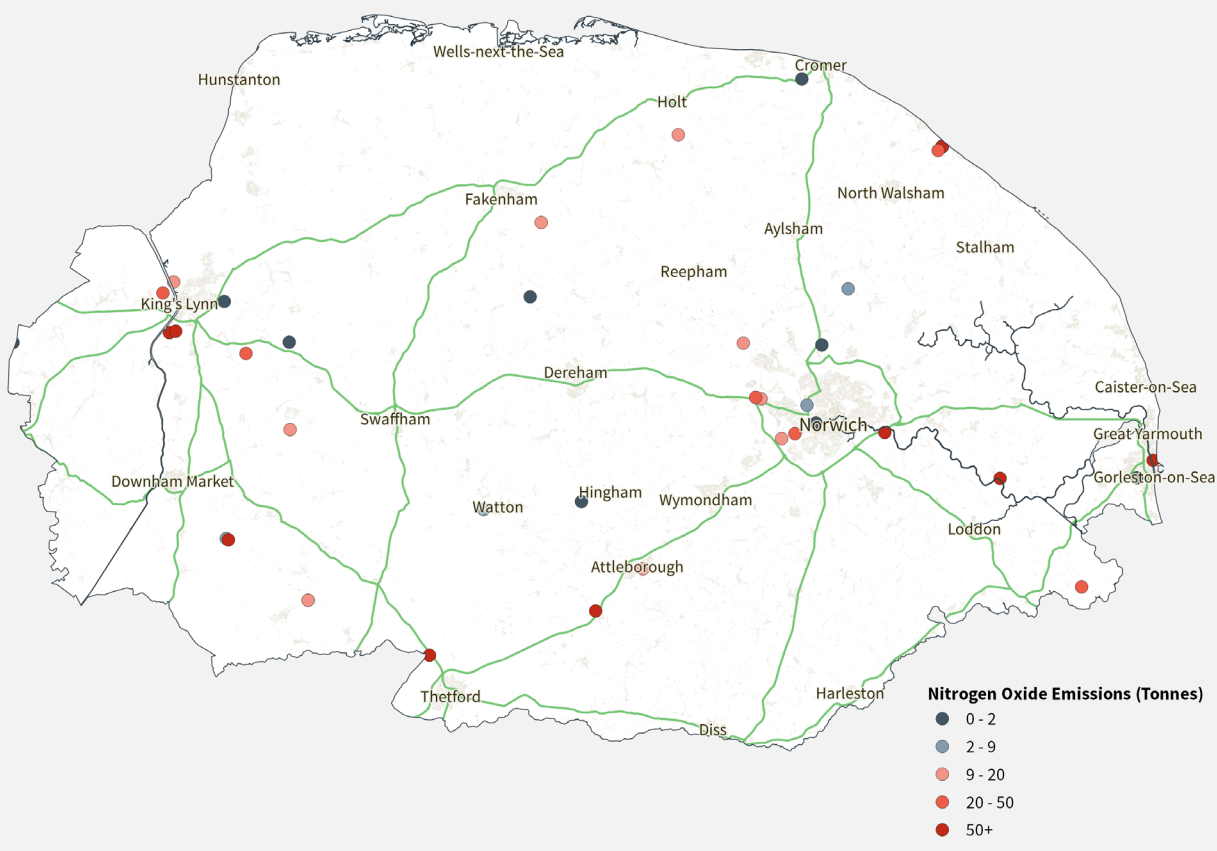


Norfolk's emissions

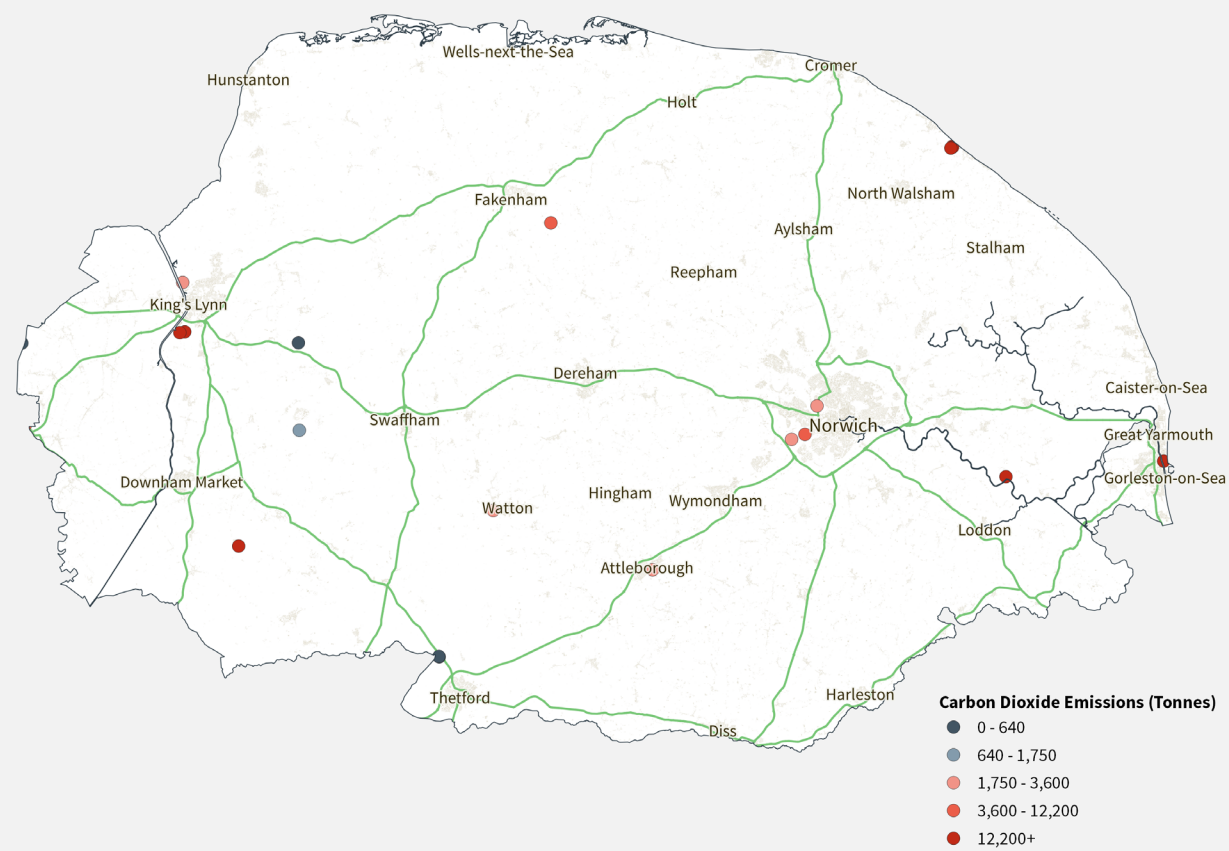
Some of Norfolk's highest emissions levels are along its primary road networks...

The highest level of NOx emissions (exceeding 50 tonnes) in Norfolk are along main transport corridors of A47 and A11 running through King's Lynn, Norwich and Great Yarmouth. CO2 emissions exceeding 12,000 tonnes demonstrate a similar pattern across Norfolk with particularly high concentrations in Great Yarmouth and King's Lynn.

NOx emissions, 2019



CO2 emissions, 2019



Source: National Atmospheric Emissions Inventory, 2019



Norfolk's energy infrastructure

Document	Opportunities, challenges and pressures
<p>Energy Sector Recovery and Resilience Plan New Anglia LEP (May 2021)</p>	<p>This document is the plan for the role of Norfolk & Suffolk's energy sector in terms of COVID-19 recovery and long-term contribution to the transition to green energy. Norfolk & Suffolk have the potential to supply up to 50% of the UK's 40GW target by 2030, with the proposed new power station at Sizewell expected to meet 7% of the country's demand.</p> <ul style="list-style-type: none"> • Offshore wind: Norfolk and Suffolk are part of the UK's largest offshore wind cluster. IN 2020, the coastal zone is home to 4.6GW or 44% of the UK's operational offshore wind power. The ports of Lowestoft and Great Yarmouth provide world-class operations and maintenance with over 50 years supporting the offshore gas industry and have become strategic for the offshore wind sector. The Enterprise Zone status of Lowestoft and Great Yarmouth provides land to develop manufacturing facilities and house supply chain companies. • Oil and gas: The Southern North Sea (SNS) is the UK's natural gas basin with a third of the UK's domestic gas requirements handled at the Bacton Gas Terminal in North Norfolk. The region is well place to receive a significant proportion of the predicted £2.5 billion to decommissioning redundant SNS assets to 2030. New and innovative technologies are being investigated including offshore desalination for hydrogen fuel production and carbon capture and storage. Bacton also has scope to be developed into a major innovation and demonstration project (Bacton 2.0) for new energy, including hydrogen production for London and the South East. • Nuclear: Suffolk is home to three nuclear power stations including the proposed Sizewell C nuclear new build project. Sizewell C is projected to generate significant spend in the East of England and its construction will employ close to 24,000 directly and indirectly in its supply chain. • Onshore Renewables & Energy Systems: Norfolk and Suffolk is a leading area for onshore renewables including animal waste biomass. A third of the national capacity is in two large plants at Thetford and Eye power stations. The region's sizeable agri-food sector, animal waste and biomass present a significant opportunity for sustainable energy generation.
<p>Norfolk Strategic Infrastructure Delivery Plan (2020)</p>	<p>Norfolk County Council identifies and outlines key infrastructure needed to deliver economic growth in Norfolk, with a number of growth areas identified in need of energy infrastructure support:</p> <ul style="list-style-type: none"> • Thetford: two major areas of committed growth at the Thetford Sustainable Urban Extension (SUE) and Thetford Enterprise Park (TEP) are coming forward to deliver 5,000 dwellings and 22.5 ha of commercial land. A Primary Substation to be located at Thetford SUE is to serve the 5,000 dwellings and commercial properties at TEP. Further network reinforcement works estimated to cost £6.5m will be required to serve the TEP in the long-term. • Attleborough: The Attleborough Sustainable Urban Extension (SUE) is allocated with outline planning permission for 4,000 dwellings and 10 ha of commercial land. The delivery of power infrastructure to meet the long-term power needs of Attleborough SUE is estimated to cost £22m. • Snetterton: an excess of 150 acres of undeveloped/underdeveloped employment land at Snetterton Heath is being assessed to identify further infrastructure projects which may be required to support major developments on Breckland's largest employment site.



Norfolk's water infrastructure

Document	Opportunities, challenges and pressures
Water Resources East Briefing Pack for Regional Planning Conferences (August 2021)	<p>Norfolk is one of the driest regions in the UK. Water Resources East forecast future demand for water across commercial and residential uses. Challenges include:</p> <p>Agri-food:</p> <ul style="list-style-type: none">• The UK has potential to become a global leader in water-friendly food production with farms in the East of England already major growers of a significant proportion of the nation's food derived from fruit and vegetable crops, potatoes and sugar beet. Agricultural produce is also delivered into a food processing industry that is the UK's largest manufacturing sector.• The agri-food sector is expected to face challenges due to limited future water availability – with significant variation across different catchments. Projected growth in the need for spray irrigation by 2050 in the region could be impacted by the Environment Agency's agri-food sustainability reductions. This is forecast to have no impacts in some catchments but lead to the loss of one-third of all currently available water in others.• The sector is also vulnerable to climate change. Around one-third of the WRE farmed area is vulnerable to flood risk; with high value fruit and vegetable production concentrated in these areas.• More work is needed across a multi-sector approach to understand and plan for accommodating future water needs for agri-food, particularly given the highly fragmented and rurally isolated nature of the farming sector. <p>Energy</p> <ul style="list-style-type: none">• Thermal Power Stations in the region use water extraction primarily for cooling. The transition to net zero in the UK will increase demand for electricity – most of which will be provided by renewables but with continuation of reliance on nuclear, thermal power and alternative fuels. There is no sector plan for water. Water abstraction restrictions could limit developer choice of technology and lead to projects being perceived as too risky or insufficiently rewarding, cutting off routes to net zero, limiting security of supply and/or impacting future costs for the customer.• The energy transformation to net zero is likely to result in higher freshwater demands from the power sector. The sector has no plan and current and future developments will need secure access to water to provide power. Future development of power assets is likely to be required both inland and at the coast. <p>Public water supply</p> <ul style="list-style-type: none">• Sustainability reductions to reduce abstraction volumes and potential impacts on waterbodies, drought resilience, climate change and achieving net zero carbon emissions by 2030 are all challenges facing the public water supply.• Population growth, combined with the region as being the driest in the UK and the effect of COVID-19 on a redistributed population are all pressures on future water demands. Future supply options.
Anglian Water: Water Resources Management Plan (2019)	<ul style="list-style-type: none">• This report promotes the efficient and effective use of available resources through a demand management programme that aims to reduce leakage by 22% by 2025 and 42% by 2045, with average per capita consumption falling to 120 l/h/d by 2045. the plan considers improving resilience of public water supply by adapting to climate change, the delivery of a wider resilience strategy by diversification of water supply and enhancement of the environment by reduction in abstraction in sensitive areas.• Supply-demand forecasts estimate that the baseline supply will be from a net surplus to net deficit by 2025, with 60% of the impact to be experienced by 2025. Climate change and population growth will further exacerbate the challenges posed.



Focus On: Norfolk's Districts

Norfolk has a diverse range of places...

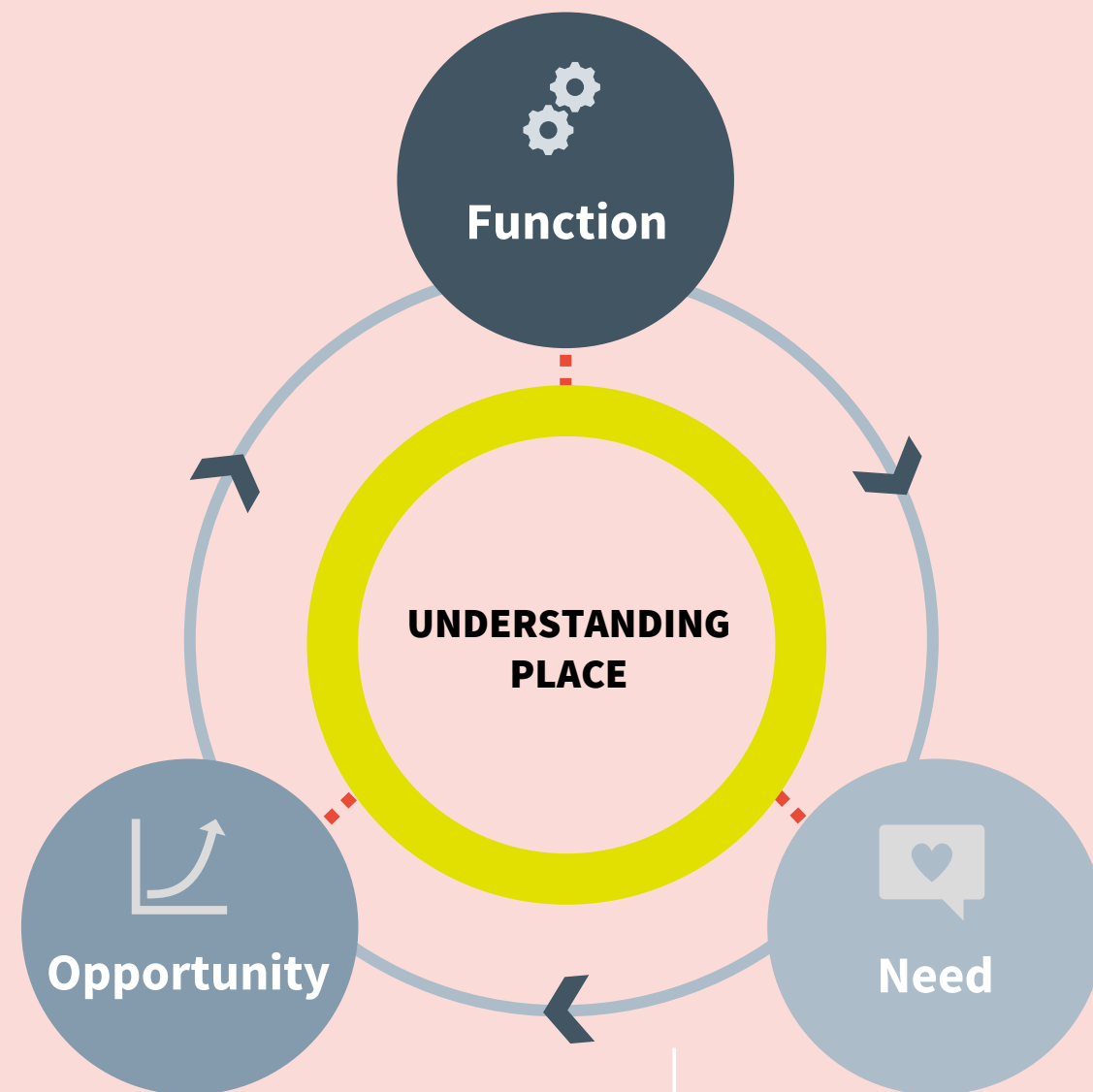
The county boasts vibrant villages, beautiful market towns and the historic city of Norwich. These are all contained within the county's seven districts: (1) Kings Lynn & West Norfolk; (2) Breckland; (3) North Norfolk; (4) Broadland; (5) Norwich; (6) South Norfolk; and, (7) Great Yarmouth.

A framework has been created to understand the need for investment and main opportunities to drive transformative economic and social change in each of Norfolk's districts. The framework is based on three broad assessment areas:

- **Function:** What is the economic function and role of each district and what contribution to they make to the county's economy?
- **Need:** To what extent is investment needed in each district to overcome socio-economic challenges and issues?
- **Opportunity:** What is the nature of local economic aspiration and what is the headroom for future growth?

The following pages look at each of these assessment areas in turn before providing conclusions related to both need and opportunity.

The conclusions will help inform decision making about where investment can make the biggest difference as part of the Investment Framework. The exercise could be repeated in the future at a more granular level to understand need and opportunity for towns and cities.





Norfolk's Districts: **Function**

Population (2020)	Number of Jobs (2020)	Number of Businesses (2021)	GVA (2019)	% of Working Age Residents (2020)	Jobs:People Ratio (2019)
151,245 King's Lynn and West Norfolk	98,240 Norwich	6,535 King's Lynn and West Norfolk	4,224 Norwich	68 Norwich	1.11 Norwich
143,066 South Norfolk	69,400 South Norfolk	6,520 South Norfolk	3,463 Broadland	56 King's Lynn and West Norfolk	0.78 North Norfolk
142,177 Norwich	67,140 King's Lynn and West Norfolk	6,410 Norwich	3,085 King's Lynn and West Norfolk	58 South Norfolk	0.78 King's Lynn and West Norfolk
141,255 Breckland	56,610 Breckland	6,005 Breckland	2,809 South Norfolk	57 Breckland	0.78 South Norfolk
131,931 Broadland	56,150 Broadland	5,530 Broadland	2,471 Breckland	58 Broadland	0.78 Broadland
105,167 North Norfolk	40,610 Great Yarmouth	4,920 North Norfolk	1,793 Great Yarmouth	57 Great Yarmouth	0.76 Great Yarmouth
99,198 Great Yarmouth	39,810 North Norfolk	3,585 Great Yarmouth	1,617 North Norfolk	53 North Norfolk	0.69 Breckland
				58 Norfolk	0.82 Norfolk
				62 England	0.88 England
Source: ONS Population Estimates (2020)	Source: ASHE (2020)	Source: UK Business Counts (2021)	Source: GVA (2019)	Source: ONS Population Estimates (2020)	Source: Jobs density (2019)

KEY					
Great Yarmouth	Norwich	South Norfolk	Broadland	King's Lynn and West Norfolk	North Norfolk

Norwich, King's Lynn & West Norfolk and South Norfolk account for higher numbers of jobs and businesses compared to other districts, as well as a greater proportion of working age residents.

Great Yarmouth, Broadland and North Norfolk all support a lower number of jobs and businesses, although in relative terms North Norfolk has a higher job density.

Norwich, Broadland and King's Lynn & West Norfolk have higher levels of Gross Value Added (GVA) than other districts. This implies higher levels of productivity generated by their local economies.



Norfolk's Districts: **Need**

% of population in 20% most deprived (2019)	% of people with no qualifications (2019)	Male life expectancy at birth (2019)	Female life expectancy at birth (2019)	Social mobility ranking (2017) – out of 346 local authorities	Median wages (2020)	KEY					
						Great Yarmouth	Norwich	South Norfolk	Broadland	King's Lynn and West Norfolk	North Norfolk
40 Great Yarmouth	11 Great Yarmouth	78 Great Yarmouth	83 King's Lynn and West Norfolk	300 Breckland	£26,597 Breckland						
39 Norwich	7 King's Lynn and West Norfolk	78 Norwich	83 Great Yarmouth	297 King's Lynn and West Norfolk	£28,500 Norwich						
15 King's Lynn and West Norfolk	7 Breckland	79 Breckland	83 Norwich	294 Norwich	£28,678 North Norfolk						
10 Breckland	7 North Norfolk	80 King's Lynn and West Norfolk	84 Breckland	293 Great Yarmouth	£28,981 King's Lynn and West Norfolk						
3 North Norfolk	7 Norwich	80 North Norfolk	85 North Norfolk	263 North Norfolk	£29,139 South Norfolk						
0 South Norfolk	6 Broadland	81 Broadland	85 South Norfolk	152 South Norfolk	£29,351 Great Yarmouth						
0 Broadland	4 South Norfolk	81 South Norfolk	85 Broadland	93 Broadland	£29,861 Broadland						
	7 Norfolk	80 Norfolk	84 Norfolk		£28,424 Norfolk						
	6 England	80 England	83 England		£31,777 England						
Source: IMD (2019)	Source: Annual Population Survey (2019)	Source: Public Health England (2019)	Source: Public Health England (2019)	Source: Social Mobility Index (2017)	Source: AHSE (2020)						

Broadland and South Norfolk demonstrate lower levels of need in terms of social mobility, life expectancy, median wages, and deprivation.

Great Yarmouth performs the worst for deprivation and qualification levels whilst Breckland displays the worst level of social mobility and the lowest median wage.



Norfolk's Districts: Opportunity

Proposed housing growth (2036)	Projected % employment growth (2019-2040)	Projected % GVA growth (2019-2040)	% of population with degree level qualifications	% of Knowledge Economy jobs (2020)
16,072 South Norfolk	21 South Norfolk	49.2 South Norfolk	54 South Norfolk	22 Broadland
15,204 Norwich	6.55 Norwich	30.8 Great Yarmouth	37 Breckland	22 Norwich
12,272 Breckland	2.58 Broadland	29.7 Norwich	22 Great Yarmouth	11 South Norfolk
10,155 King's Lynn and West Norfolk	0.56 Breckland	24.1 Broadland	20 Broadland	11 Great Yarmouth
8,581 North Norfolk	-3.06 Great Yarmouth	18.8 North Norfolk	13 King's Lynn and West Norfolk	9 Breckland
8,210 Broadland	-3.62 North Norfolk	18.7 Breckland	41 Norwich	8 King's Lynn and West Norfolk
7,140* Great Yarmouth	-6.10 King's Lynn and West Norfolk	18.0 King's Lynn and West Norfolk	2 North Norfolk	7 North Norfolk
	4.5 Norfolk	28.2 Norfolk	35 Norfolk	14 Norfolk
* 2013-2030 projection	6 UK	34 UK	43 England	20 England
Source: Local Plans	Source: Oxford Economics	Source: Oxford Economics	Source: Annual Population Survey (2020)	Source: BRES (2020)

KEY					
Great Yarmouth	Norwich	South Norfolk	Broadland	King's Lynn and West Norfolk	North Norfolk

South Norfolk displays the highest levels of proposed housing growth, employment growth, and GVA as well as the highest level of degree qualifications. Norwich also displays high levels of projected GVA and housing growth.

North Norfolk, Breckland and King's Lynn & West Norfolk present less opportunity in employment or GVA growth.

Breckland has a lower proportion of knowledge economy jobs compared to districts with similar levels of degree qualification.



Norfolk's Districts: Opportunity

Breckland	
Biggest Employment Sectors (2019)	Projected Growth (2030)
8,730 Wholesale and retail	17.5% Administrative and support
8,490 Manufacturing	16.4% Human health and social work
5,550 Construction	14.8% Arts, entertainment and recreation
5,300 Human health and social work	12.5% Information and communication
4,560 Education	11.3% Professional, scientific and tech

King's Lynn and West Norfolk	
Biggest Employment Sectors (2019)	Projected Growth (2030)
10,680 Manufacturing	13.5% Human health and social work
9,880 Mining and Quarrying	13.5% Financial and insurance
7,400 Other service activities	8.6% Mining and Quarrying
5,190 Arts, entertainment and recreation	8% Electricity, gas steam and air
5,100 Information and communication	7.8% Real estate activities

Broadland	
Biggest Employment Sectors (2019)	Projected Growth (2030)
7,870 Mining and quarrying	18.9% Human health and social work
7,740 Transportation and storage	15.1% Transportation and storage
7,430 Professional, scientific and tech	14.9% Manufacturing
5,850 Electricity, gas steam and air	12.5% Real estate activities
5,010 Agriculture, forestry & fishing	10.2% Arts, entertainment and recreation

North Norfolk	
Biggest Employment Sectors (2019)	Projected Growth (2030)
6,500 Wholesale and retail trade	13.8% Arts, entertainment and recreation
4,960 Accommodation and food service	12% Financial and insurance
4,650 Financial and insurance	11% Administrative and support
3,600 Information and communication	7.6% Human health and social work
3,260 Other service activities	7.4% Mining & Quarrying

Great Yarmouth	
Biggest Employment Sectors (2019)	Projected Growth (2030)
8,100 Financial and insurance	15.2% Arts, entertainment and recreation
6,150 Accommodation and food service	13.2% Financial and insurance
5,780 Wholesale and retail trade	12.4% Professional, scientific and tech
3,540 Professional, scientific and tech	10.3% Human health and social work
3,300 Other service activities	8.4% Administrative and support

Norwich	
Biggest Employment Sectors (2019)	Projected Growth (2030)
17,040 Wholesale and retail	17.2% Financial and insurance
13,120 Agriculture, forestry & fishing	17.2% Electricity, gas steam and air
8,570 Accommodation and food service	16.9% Accommodation and food service
7,980 Financial and insurance	14% Public administration and defence
7,860 Professional, scientific and tech	11.9% Construction

Manufacturing, mining & quarrying and wholesale & retail sectors are currently the largest employment sectors across Norfolk.

Administrative, health & social work and financial & insurance sectors account for the largest projected employment growth. Wholesale & retail does not feature as a high growth area in any district.



Norfolk's Districts: Opportunity

Each district has specific economic development and regeneration. Some of the districts' most significant opportunities and aspirations are set out below.

King's Lynn and West Norfolk

- Local Plan Review in development with priorities including:
- Sustainable economy that will be supported through the provision of physical and digital infrastructure
 - Strategically well connected through the King's Lynn – Cambridge – London rail link and A47 road
 - Skills and aspirations development in young people and adults to contribute to a prospering local economy Retaining a focus on tourism and West Norfolk as a premier tourism destination
 - Shift towards encouraging development towards Downham Market

Breckland

- Breckland Local Plan:
- Allocation of employment land with new office space focus to be on town centres
 - Maximise benefits of the Cambridge Norwich Tech Corridor
 - Breckland Town Delivery Plans in development Key Settlements of Attleborough and Thetford, and its Market Towns of Dereham, Watton and Swaffham as a central development hierarchy

Great Yarmouth

- Great Yarmouth Economic Strategy:
- Encouragement of development proposals that seek to improve and enhance existing tourist and leisure offer
 - Secure new inward investment to the borough to create a vibrant economy and match local skills provision
 - Great Yarmouth and Gorleston as important town centres
 - Encourage growth of enterprise zones and business parks to encourage business growth



North Norfolk

- (New) Local Plan in development with aims and objectives for the local economy:
- Tourism dominated economy to be distinct and diverse in its offer
 - E-commerce may present opportunities to overcome traditional problems of peripherality
 - Recent completion of the Norwich Northern Distributor Road (NDR) opens opportunities for business growth
 - Structural changes to agriculture to present opportunities for new rural employment
 - Farming to be encouraged to diversify into new agricultural and non-agricultural business activities

Broadland, South Norfolk and Norwich

- The ambitions of these districts is set out in the Joint Emerging Local Plan as the Greater Norwich Local Plan:
- Policies of the plan seek to growth the local economy in a sustainable way to support jobs and inclusive growth in both urban and rural locations to
 - Norwich urban area as playing a key role in the employment
 - Changing nature of retail and town centres to be supported through a development hierarchy
 - Importance of tourism to the local economy
 - Needs of SMEs and start-ups to be addressed through employment site provision
 - Tourism, environmental and cultural industries to be promoted and assisted
 - Facilitation of the expansion of opportunities for innovation, skills and training



Norfolk's Districts: Opportunity

Norfolk's districts have important clusters of economic activity that underpin local specialisms. These areas of high economic output present a range of opportunities to support economic growth as investment in these areas is likely to catalyse multiplier effects.

Norwich Financial and Insurance Cluster

Districts: Norwich

- One of the most specialised financial and insurance clusters in Europe with a 200-year history
- Home to Aviva, Marsh and Moneyfacts
- Growing number of smaller fin-tech companies
- Home to the first National Skills Academy for Financial Services, underpinned by Aviva
- Cluster remains strong locally despite national declines
- Benefits from its proximity to London and other financial hubs

Norwich Research Park

Districts: Norwich

- Europe's largest single site hub of research, business, training, education and enterprise in food and health
- Comprises of researchers and hundreds of organisations focusing on the full range of technical activities required to research, develop, test, commercialise and market new scientific innovations
- Home to four world-class research institutions: The John Innes Centre, The Quadram Institute, The Earlham Institute and The Sainsbury Laboratory

Cambridge-Norwich Tech Corridor:

Districts: Norwich, South Norfolk, King's Lynn and West Norfolk

- Spans over 100km and connects two important cities
- Contains over 12,000 knowledge intensive businesses
- Significant housing and commercial development planned along the A11, most notably the redevelopment of RAF Mildenhall and Thetford Urban Extension
- Assets include Scottow Enterprise Park, Norwich Research Park, Hethel Engineering Centre, Norwich University of the Arts, Suffolk Park, Eastern Agri-Tech Innovation Hub, West Suffolk College, Wellcome Genome Campus, University of Cambridge, Cambridge Biomedical Campus, Granta Park and Cambridge Science Park

Norwich Creative and Digital Cluster

Districts: Norwich

- Norwich hosts a growing cluster of digital and creative businesses
- City characterised by SMEs and start ups in this sphere
- The University of East Anglia provides graduates and holds networking events
- Norwich University of the Arts has specialisms in arts, design and media
- Norwich University of the Arts is home to the Ideas Factory Incubation Centre
- Digital and creative businesses include Rainbird, EPOS Now, Further, Knit, FXHome and Lambda Films

East of England Energy Zone

Districts: Great Yarmouth and North Norfolk

- Unrivalled mix of wind power, gas and nuclear energy
- Bacton Gas Terminal provides a third of the UK's gas supply
- OrbisEnergy is a centre of excellence for renewables
- Forthcoming Norfolk Vanguard will be the world's largest coastal windfarm
- The Southern North Sea has 150 offshore gas assets
- The Southern North Sea has 986 offshore wind turbines generating 3.75GW of renewable energy
- Over 1,000 wind turbines to be delivered over the next decade across the zone
- Enterprise Zone status has been awarded



Clean Energy definition

20110	Manufacture of industrial gases	50100	Sea and coastal passenger water transport
20140	Manufacture of other organic basic chemicals	50200	Sea and coastal freight water transport
24460	Processing of nuclear fuel	50300	Inland passenger water transport
25110	Manufacture of metal structures and parts of structures	50400	Inland freight water transport
27110	Manufacture of electric motors, generators and transformers	51101	Scheduled passenger air transport
27120	Manufacture of electricity distribution and control apparatus	51102	Non-scheduled passenger air transport
27200	Manufacture of batteries and accumulators	52101	Operation of warehousing and storage facilities for water transport
27320	Manufacture of other electronic and electric wires and cables	52103	Operation of warehousing and storage facilities for land transport
27900	Manufacture of other electrical equipment	52211	Operation of rail freight terminals
28110	Manufacture of engines and turbines, except aircraft, vehicle and c	52219	Other service activities incidental to land transportation, nec (no
30110	Building of ships and floating structures	52220	Service activities incidental to water transportation
33110	Repair of fabricated metal products	52230	Service activities incidental to air transportation
33120	Repair of machinery	52241	Cargo handling for water transport activities of division 50
33130	Repair of electronic and optical equipment	52243	Cargo handling for land transport activities of division 49
33140	Repair of electrical equipment	52290	Other transportation support activities
33150	Repair and maintenance of ships and boats	70210	Public relations and communication activities
33190	Repair of other equipment	70221	Financial management
33200	Installation of industrial machinery and equipment	70229	Management consultancy activities (other than financial management)
35110	Production of electricity	71121	Engineering design activities for industrial process and production
35120	Transmission of electricity	71122	Engineering related scientific and technical consulting activities
35130	Distribution of electricity	71129	Other engineering activities (not including engineering design for
35140	Trade of electricity	71200	Technical testing and analysis
35210	Manufacture of gas	74901	Environmental consulting activities
35220	Distribution of gaseous fuels through mains		
35230	Trade of gas through mains		
38210	Treatment and disposal of non-hazardous waste		
38310	Dismantling of wrecks		
42210	Construction of utility projects for fluids		
42220	Construction of utility projects for electricity and telecommunicat		
46120	Agents involved in the sale of fuels, ores, metals and industrial c		
46711	Wholesale of petroleum and petroleum products		
46719	Wholesale of fuels and related products (other than petroleum and p		
47300	Retail sale of automotive fuel in specialised stores		
49200	Freight rail transport		
49410	Freight transport by road		
49500	Transport via pipeline		

18140 : Binding and related services
26200 : Manufacture of computers and peripheral equipment
26301 : Manufacture of telegraph and telephone apparatus and equipment
26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment)
18110 : Printing of newspapers
18121 : Manufacture of printed labels
18129 : Printing (other than printing of newspapers and printing on labels and tags) nec
18130 : Pre-press and pre-media services
18201 : Reproduction of sound recording
18202 : Reproduction of video recording
18203 : Reproduction of computer media
72110 : Research and experimental development on biotechnology
72190 : Other research and experimental development on natural sciences and engineering
58290 : Other software publishing
61100 : Wired telecommunications activities
61200 : Wireless telecommunications activities
61900 : Other telecommunications activities
62011 : Ready-made interactive leisure and entertainment software development
62012 : Business and domestic software development
62020 : Computer consultancy activities
62030 : Computer facilities management activities
62090 : Other information technology and computer service activities
63110 : Data processing, hosting and related activities
65201 : Life reinsurance
65202 : Non-life reinsurance
66290 : Other activities auxiliary to insurance and pension funding
71112 : Urban planning and landscape architectural activities
71121 : Engineering design activities for industrial process and production
71122 : Engineering related scientific and technical consulting activities
71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)

71200 : Technical testing and analysis
72200 : Research and experimental development on social sciences and humanities
74901 : Environmental consulting activities
74902 : Quantity surveying activities
74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)
91040 : Botanical and zoological gardens and nature reserve activities
58110 : Book publishing
58120 : Publishing of directories and mailing lists
58130 : Publishing of newspapers
58141 : Publishing of learned journals
58142 : Publishing of consumer, business and professional journals and periodicals
58190 : Other publishing activities
58210 : Publishing of computer games
61300 : Satellite telecommunications activities
63120 : Web portals
70210 : Public relations and communication activities
71111 : Architectural activities
73110 : Advertising agencies
73120 : Media representation
74100 : Specialised design activities
74201 : Portrait photographic activities
74202 : Other specialist photography (not including portrait photography)
74203 : Film processing
74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec
74300 : Translation and interpretation activities
91011 : Library activities
91012 : Archive activities
91020 : Museum activities
64110 : Central banking
64191 : Banks
64192 : Building societies
64201 : Activities of agricultural holding companies
64202 : Activities of production holding companies

64203 : Activities of construction holding companies
64204 : Activities of distribution holding companies
64205 : Activities of financial services holding companies
64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c
64301 : Activities of investment trusts
64302 : Activities of unit trusts
64303 : Activities of venture and development capital companies
64304 : Activities of open-ended investment companies
64305 : Activities of property unit trusts
64306 : Activities of real estate investment trusts
64910 : Financial leasing
64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
64922 : Activities of mortgage finance companies
64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.
64991 : Security dealing on own account
64992 : Factoring
64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
65110 : Life insurance
65120 : Non-life insurance
65300 : Pension funding
66110 : Administration of financial markets
66120 : Security and commodity contracts brokerage
66190 : Other activities auxiliary to financial services, except insurance and pension funding
66210 : Risk and damage evaluation
66220 : Activities of insurance agents and brokers
66300 : Fund management activities
69101 : Barristers at law
69102 : Solicitors
69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec
69201 : Accounting, and auditing activities
69202 : Bookkeeping activities
69203 : Tax consultancy
70100 : Activities of head offices
70221 : Financial management
70229 : Management consultancy activities (other than financial management)
73200 : Market research and public opinion polling
82110 : Combined office administrative service activities
82190 : Photocopying, document preparation and other specialised office support activities
82200 : Activities of call centres
82301 : Activities of exhibition and fair organizers
82302 : Activities of conference organizers
82911 : Activities of collection agencies
82912 : Activities of credit bureaus
82920 : Packaging activities
82990 : Other business support service activities nec
85410 : Post-secondary non-tertiary education
85421 : First-degree level higher education
85422 : Post-graduate level higher education
91030 : Operation of historical sites and buildings and similar visitor attractions

86111 Hospital activities

86911 Other human health activities

86211 General medical practice activities

86231 Dental practice activities

Other research and experimental development on natural sciences and

72191 engineering

72111 Research and experimental development on biotechnology

26611 Manufacture of irradiation, electromedical and electrotherapeutic equipment

86112 Medical nursing home activities

86221 Specialist medical practice activities

21211 Manufacture of pharmaceutical preparations

32511 Manufacture of medical and dental instruments and supplies

21111 Manufacture of basic pharmaceutical products

10110 : Processing and preserving of meat
 10120 : Processing and preserving of poultry meat
 10130 : Production of meat and poultry meat products
 10200 : Processing and preserving of fish, crustaceans and molluscs
 10310 : Processing and preserving of potatoes
 10320 : Manufacture of fruit and vegetable juice
 10390 : Other processing and preserving of fruit and vegetables
 10410 : Manufacture of oils and fats
 10420 : Manufacture of margarine and similar edible fats
 10511 : Liquid milk and cream production
 10512 : Butter and cheese production
 10519 : Manufacture of milk products (other than liquid milk and cream, butter, cheese) nec
 10520 : Manufacture of ice cream
 10611 : Grain milling
 10612 : Manufacture of breakfast cereals and cereals-based foods
 10620 : Manufacture of starches and starch products
 10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes
 10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
 10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products
 10810 : Manufacture of sugar
 10821 : Manufacture of cocoa, and chocolate confectionery
 10822 : Manufacture of sugar confectionery
 10831 : Tea processing
 10832 : Production of coffee and coffee substitutes
 10840 : Manufacture of condiments and seasonings
 10850 : Manufacture of prepared meals and dishes
 10860 : Manufacture of homogenised food preparations and dietetic food
 10890 : Manufacture of other food products nec
 10910 : Manufacture of prepared feeds for farm animals
 10920 : Manufacture of prepared pet foods
 11010 : Distilling, rectifying and blending of spirits

11020 : Manufacture of wine from grape
 11030 : Manufacture of cider and other fruit wines
 11040 : Manufacture of other non-distilled fermented beverages
 11050 : Manufacture of beer
 11060 : Manufacture of malt
 11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters
 46170 : Agents involved in the sale of food, beverages and tobacco
 46310 : Wholesale of fruit and vegetables
 46320 : Wholesale of meat and meat products
 46330 : Wholesale of dairy products, eggs and edible oils and fats
 46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks
 46342 : Wholesale of wine, beer, spirits and other alcoholic beverages
 46360 : Wholesale of sugar and chocolate and sugar confectionery
 46370 : Wholesale of coffee, tea, cocoa and spices
 46380 : Wholesale of other food, including fish, crustaceans and molluscs
 46390 : Non-specialised wholesale of food, beverages and tobacco
 47110 : Retail sale in non-specialised stores with food, beverages or tobacco predominating
 47210 : Retail sale of fruit and vegetables in specialised stores
 47220 : Retail sale of meat and meat products in specialised stores
 47230 : Retail sale of fish, crustaceans and molluscs in specialised stores
 47240 : Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores
 47250 : Retail sale of beverages in specialised stores
 47290 : Other retail sale of food in specialised stores
 47810 : Retail sale via stalls and markets of food, beverages and tobacco products
 56101 : Licensed restaurants
 56102 : Unlicensed restaurants and cafes
 56103 : Take away food shops and mobile food stands
 56210 : Event catering activities
 56290 : Other food service activities
 56301 : Licensed clubs
 56302 : Public houses and bars

6201 Computer programming activities
6202 Computer consultancy activities
6203 Computer facilities management activities
6209 Other information technology and computer service activities
6311 Data processing, hosting and related activities
6312 Web portals
6391 News agency activities
6399 Other information service activities not elsewhere classified
7021 Public relations and communication activities
7111 Architectural activities
7311 Advertising agencies
7312 Media representation
7410 Specialised design activities
7420 Photographic activities
7430 Translation and interpretation activities
8552 Cultural education
9001 Performing arts
9002 Support activities to performing arts
9003 Artistic creation
9004 Operation of arts facilities
9101 Library and archive activities
9102 Museum activities
9511 Repair of computers and peripheral equipment
9512 Repair of communication equipment

2611 Manufacture of electronic components
2612 Manufacture of loaded electronic boards
2620 Manufacture of computers and peripheral equipment
2630 Manufacture of communication equipment
2640 Manufacture of consumer electronics
2680 Manufacture of magnetic and optical media
3212 Manufacture of jewellery and related articles
4651 Wholesale of computers, computer peripheral equipment and software
4652 Wholesale of electronic and telecommunications equipment and parts
5811 Book publishing
5812 Publishing of directories and mailing lists
5813 Publishing of newspapers
5814 Publishing of journals and periodicals
5819 Other publishing activities
5821 Publishing of computer games
5829 Other software publishing
5911 Motion picture, video and television programme production activities
5912 Motion picture, video and television programme post-production activities
5913 Motion picture, video and television programme distribution activities
5914 Motion picture projection activities
5920 Sound recording and music publishing activities
6010 Radio broadcasting
6020 Television programming and broadcasting activities
6110 Wired telecommunications activities
6120 Wireless telecommunications activities
6130 Satellite telecommunications activities
6190 Other telecommunications activities

- 551 : Hotels and similar accommodation
- 561 : Restaurants and mobile food service activities
- 562 : Event catering and other food service activities
- 563 : Beverage serving activities
- 801 : Private security activities
- 900 : Creative, arts and entertainment activities
- 910 : Libraries, archives, museums and other cultural activities
- 920 : Gambling and betting activities
- 931 : Sports activities
- 932 : Amusement and recreation activities
- 471 : Retail sale in non-specialised stores
- 478 : Retail sale via stalls and markets
- 491 : Passenger rail transport, interurban
- 493 : Other passenger land transport
- 552 : Holiday and other short stay accommodation
- 553 : Camping grounds, recreational vehicle parks and trailer parks
- 559 : Other accommodation
- 842 : Provision of services to the community as a whole
- 861 : Hospital activities
- 869 : Other human health activities
- 871 : Residential nursing care activities
- 872 : Residential care activities for learning disabilities, mental health and substance abuse
- 873 : Residential care activities for the elderly and disabled
- 881 : Social work activities without accommodation for the elderly and disabled

