

Norwich City Council
SCRUTINY COMMITTEE
ITEM 7

REPORT for meeting to be held on 17 September 2020

New Anglia Local Enterprise Partnership (LEP)

Summary: The LEP will be attending the meeting of Norwich City Council's scrutiny committee to answer questions from members on behalf of themselves and their constituents. This item was postponed from scrutiny committee due to take place on 25 March 2020 due to the COVID-19 pandemic.

Also attached to this report is the LEP's Covid-19 Economic Recovery Restart Plan which may be of interest to scrutiny members when considering this item.

Recommendation: Members are asked to consider their lines of questioning to the LEP.

Contact Officer: Adam Clark, strategy manager, tel 01603 989272

1. Local Economic Partnerships

Local Enterprise Partnerships (LEPs) were established in 2010 as 'locally-derived business-led partnerships between the private and public sector that would drive local economic growth.' These non-statutory bodies assumed many of the responsibilities of Regional Development Agencies (RDAs) and have responsibility for Enterprise Zones.

There are now 38 LEPs. By 2017 they had responsibility for around £12 billion of public funding, including being the mechanism for channelling the Local Growth Fund to localities. Public funding for LEPs is directed via a local authority in the area of the LEP, which is appointed to undertake the accountable body role.

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2. New Anglia LEP

The New Anglia LEP (NALEP) was officially granted permission by ministers to form in November 2010. It covers 14 district authorities in Norfolk and Suffolk, including Norwich City Council area. The accountable body is Suffolk County Council. The NALEP board consists of 18 board members, 10 of whom are from the private sector, six from local authorities and 2 from the education sector. The Chief Operating Officer is Rosanne Wijnberg. The board is supplemented by a range of sub boards and committees, and is run operationally by a staff team, headed up by Chief Executive, Chris Starkie.

NALEP has a range of programmes and responsibilities. Ones that the committee may particularly wish to note are

- Developing and overseeing the Economic and Local Industrial strategies for the NALEP region
- Channelling funding and investment within the region, for example the £290m of Growth Fund investment, European Structural and Investment Funds, some of which is made available through open funding calls, such as the Innovative Projects Fund. LEP funding has been awarded to a number of Norwich businesses to enable expansion.
- Overseeing the Greater Norwich City Deal
- Acting as the government’s Green Economy Pathfinder Local Enterprise Partnership
- Hosting the Norwich Opportunity Area team
- NALEP are represented on the Town Deals Board by Chris Starkie

3. Governance and transparency

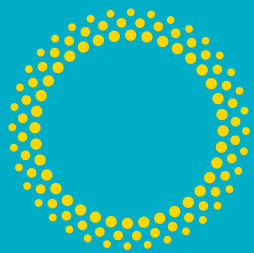
In 2017, NALEP commissioned PwC to review its governance and operations, which led to a series of recommendations. The government also initiated a review of governance and transparency of LEPs in 2017 under Mary Ney. The findings of this led to recommendations and good practice guidelines for LEPs. All recommendations from both the PwC review of NALEP and the Ney review were adopted by NALEP.

4. NALEP and the city council

As well as ongoing dialogue and collaboration between the city council and NALP, there are a number of key relationships with the city council:

- The leader of Norwich City Council, Cllr Alan Waters, is one of the 6 NALP board members representing local government.
- The LEP has provided £50,000 from its Innovative Projects Fund for a partnership project between the city council and the UEA to support the Norwich Good Economy Commission, and also sits as a representative on the commission.
- Officers sit on a number of LEP sub-boards and committees including the inward investment group, the Economic Strategy Delivery Co-ordinating Board (ESDCB) and the Data Practitioner Group, which oversees and develops economic evidence for the LEP.
- The council is one of the districts participating in the Greater Norwich City Deal, which is overseen by the LEP
- Norwich City Council has participated in LEP-funded projects including the Growth Hub which provides enterprise support to local businesses; Norfolk and Suffolk Unlimited (inward investment and place branding campaign); MIPIM (inward investment exhibition); Norwich Aviation Academy.

:



Norfolk
& Suffolk
Unlimited



Covid-19 Economic Recovery Restart Plan

respond restart renew



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The Norfolk and Suffolk COVID recovery evidence base contains all data in this document unless otherwise stated.
[Click to read the evidence base.](#)



Foreword

The impact of the Covid-19 pandemic has been profound. Tens of thousands of lives lost, lockdown restrictions which have affected our daily lives, and significant damage to our local and national economy.

This restart plan sets out the actions and interventions that are being taken by a wide range of partners, including New Anglia LEP, local authorities, business, industry councils and sector groups, VCSE organisations, colleges and universities. It demonstrates the strong local appetite and energy for getting our economy going again and helping those who have been hit hardest.

Norfolk and Suffolk has a strong record of working together across the public and private sectors to deliver sustainable growth, and the recovery plans will build on this.

The restrictions imposed to slow the spread of the virus have forced thousands of businesses to stop trading entirely. Many others have seen their income reduce sharply. Some firms have been able to adapt and are innovating and thriving. But 'business as usual' has not been possible for some time, and for many the business model has changed overnight and will never be the same again.

This is the time for strong leadership, action and interventions.

The immediate and severe economic and social impacts of the health response have led to an unprecedented programme of support provided by central and local government, and a huge local effort by businesses and volunteers to help mitigate the impact of the crisis on many businesses and individuals.

But it is equally clear the economy will take time to recover, and the coming months and years will be challenging for employers and employees. Many people will find their jobs changing and many young people will be entering a labour market with far fewer jobs, at least in the short term, than were available just a few months ago.

Local partners have a clear shared vision to drive low-carbon, inclusive economic growth across Norfolk and Suffolk. We have pledged to work together to transform our growing economy into one of the best places in the world to live, work, learn and succeed in business. That ambition still firmly stands.

As the UK's Clean Growth Region, we are committed to remaining at the forefront of tackling the challenges and opportunities of climate change. This will now be a greater challenge due to the global economic shock caused by Covid-19. However, new opportunities are emerging which could enable significant advances in some areas of the economy.

The wider economic and political implications of Brexit also have a significant part to play in availability of our future workforce and plans for the coming years.

We have worked together as local partners throughout the response phase, supporting businesses, communities and individuals.

This multi-partner, multi-level plan will build on that as we recognise that getting the economy back on its feet cannot be achieved by one partner alone, or by any single strand of investment or action.

We have always been most successful when we work together for the benefit of those who live in, work in, learn in and visit Norfolk and Suffolk. The actions in this plan will help lead us out of these challenging circumstances and deliver on our region's unlimited potential.



Doug Field
Chair of New Anglia Local Enterprise Partnership



Matthew Hicks
Chair of the Suffolk Public Sector Leaders Group



Andrew Proctor
Chair of the Norfolk Local Authorities Leaders Group

Restart and renew: a two-stage approach

This Restart Plan is the first of a two-stage economic recovery plan for our area.

It will support businesses, individuals, communities, anchor institutions and further and higher education providers to start trading and living life with confidence, in an environment dominated by social distancing and economic uncertainty, as quickly and safely as possible.

The Restart Plan is:

Short-term – It focuses on actions for the next six months. It outlines measures to help those who lose their jobs, young people seeking work and businesses and entrepreneurs who require support, assisting the different sectors which make up our economy – especially those hit hardest by the crisis.

Agile and evolving – Our approach will evolve as the full impacts of the lockdown become clear. Actions will be regularly reviewed to ensure they remain relevant and further measures will be developed where necessary.

Multi-partner, multi-level – This plan has been developed and will be delivered by range of partners. It complements local public sector recovery plans and those being developed by other institutions as well as individual businesses and sectors. Many actions will be funded from existing budgets, re-prioritising where necessary. However, we are clear that the scale of the task will require further Government investment, alongside private sector, and local funding.

We are determined to rebuild a better future for our economy, working with government and focusing on more sustainable and inclusive economic growth. In the autumn, this plan will be followed by our Renew Plan – a longer-term plan for jobs and sustainable growth which will also serve to support the Government national recovery plan.



Projected impact: economy profile at a glance



63,000 independent enterprises
88% micro, 10% small, 1.6% medium, 0.4% large



More than 1/3 small businesses closed since the crisis began. Of those, 1/3 are not sure whether they will ever reopen¹



831,000 total employees in Norfolk and Suffolk. 35% are 'key workers', compared to 33% of UK employees¹



22% of Norfolk and Suffolk employees were furloughed in May, compared to 26% of UK employees²



1/3 small businesses have shelved product development plans



1/3 businesses have less than three months of cash reserves⁴



31,688 new Universal Credit claimants in April 2020 (33% under the age of 29)



A total of 95,077 people claimed Universal Credit in April (a 41% increase on March, compared to a 40% increase for the UK)³



1/4 region's exporters have reduced/cancelled international sales^{3*}



Traffic flows dropped to 1/5 of normal levels, and may be slow to recover



1/5 of apprentices (~2,000 in Norfolk and Suffolk) are not expected to return once economic restrictions are relaxed

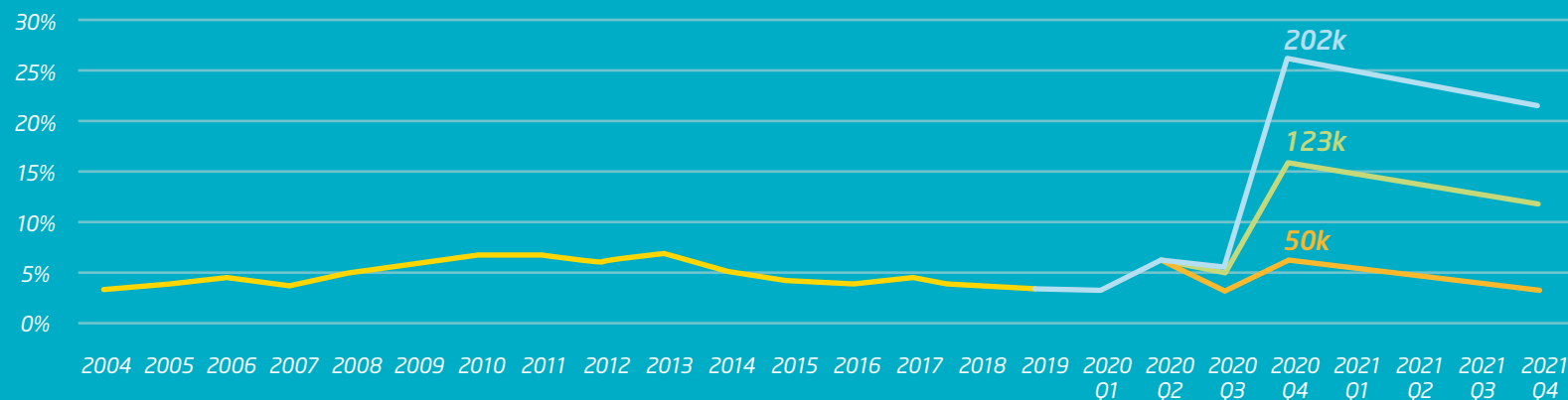


9,394 students will graduate from Norfolk and Suffolk's three universities in summer 2020, with most seeking employment or further training opportunities.

Impacts on employment:

Norfolk and Suffolk: historic and projected unemployment under three scenarios

- Historic
- Best case
- Medium case
- Worst case



These figures are not derived from 'official' sources, but rather drawn from bespoke data that has been gathered as part of the New Anglia LEP's weekly business intelligence returns. The Norfolk and Suffolk COVID recovery evidence base contains all data in this document unless otherwise stated. [Click to read the evidence base.](#)

1: ONS Key Workers Reference Tables. 2: ONS Business Impacts of Coronavirus Survey, Wave 5. 3: DWP Universal Credit



Restarting the Norfolk and Suffolk Economy

Restarting our local economy will be challenging. The scale and speed of the shutdown has never occurred before – even in wartime.

The **Restart Plan** contains an unprecedented package of measures delivered by partners locally and nationally to get businesses up and trading again, restore business, consumer and community confidence, as well as provide support to individuals made redundant and looking for work.

The Restart Plan builds on the support packages delivered by central and local government which have provided a cash lifeline for many businesses and their employees.

Key measures include:

- ...❖ **Responding to redundancies.** We will support individuals being made redundant and help businesses looking for workers, through a new local partnership of businesses and local and national agencies.
- ...❖ **Advice and support for businesses.** We will ensure every business has access to the finance and support they need, delivered through our new alliance of local authorities, the New Anglia Growth Hub, business representative organisations and trade bodies.
- ...❖ **Youth pledge.** Every young person in Norfolk and Suffolk will have the support they need to get into high quality education, employment, training, or an apprenticeship.
- ...❖ **Transforming skills.** We will ensure every individual has access to opportunities to upskill and reskill, adapting the skills provision so that it meets the changing needs of businesses and the aspirations of individuals.
- ...❖ **Mental health and wellbeing.** We are creating a programme that provides employers and employees with the mental health and wellbeing support they need.
- ...❖ **Reimagining high streets.** Our local authorities, Business Improvement Districts and other partners are developing a range of measures to help high street businesses reopen and operate safely, to build consumer confidence and rethink the way town centres function.
- ...❖ **Visitor economy.** We will launch a proactive campaign to promote Norfolk and Suffolk as a destination to live and work with tourism, hospitality and cultural businesses to help them open safely.
- ...❖ **Digitisation.** We will launch a major campaign to support businesses to build their online presence and to improve productivity, including flexible working practices for their employees, through better use of technology.
- ...❖ **Supply chain.** We will work with local companies to capitalise on opportunities to sell more goods and services locally, with a commitment from the public and private sector to procure more locally and to support local innovation.
- ...❖ **Infrastructure.** We will submit support the construction sector through continued investment in key infrastructure and make a compelling case to Government to fund priority infrastructure schemes.
- ...❖ **Norfolk & Suffolk Unlimited.** Develop a campaign to promote Norfolk and Suffolk as a place rich with investment opportunities.
- ...❖ **Safe and sustainable public transport.** As the guidance around public transport use changes we will work to support and promote safe and sustainable public transport use, to continue to improve air quality and reduce congestion.



Business environment

Thousands of businesses have been forced to stop trading entirely, or seen income levels reduce sharply, but there are some that are innovating and thriving. The impact across sectors varies.

Reopening in the setting of an ongoing pandemic will be challenging with the need to implement new ways of working that adhere to social distancing and provide safety to staff and customers.

Despite these challenging times, numerous businesses have adapted their business models, adopting new practices and innovating. Many firms and public sector organisations have had to implement changes in a matter of days that might previously have taken much longer or been considered impossible.

Many have reduced carbon emissions, or increased home working or flexible working patterns, using technology differently with both customers and employees. We want to make sure the best of these adaptations continue, particularly where they reduce carbon, increase productivity and sustainability, and lead to higher-quality and better-paid jobs.

As recovery continues, the majority of Norfolk and Suffolk businesses will need support of some kind as they restart and renew.

This is likely to include access to finance; advice on furloughing; supporting organisations returning to work in different work spaces; staff safety; dealing with staff self-isolation; support in reshaping business plans; support in restarting businesses, particularly for start-ups; supporting the self-employed; and identifying opportunities for new products and services.



Engineers at Panel Graphic producing face visors.

Norfolk and Suffolk's two multi-site [Enterprise Zones](#), covering 16 commercial development sites, present an opportunity, working with local authority partners and developers, to restart economic growth in key priority urban and coastal locations.

The coming months are crucial as we help to successfully rebuild consumer and business confidence. We want to maximise the opportunities linked to new local supply chains and take the opportunity to enhance productivity and growth through new innovations.

We have created an alliance of partners from local authorities and the New Anglia Growth Hub to business representative organisations and trade bodies.

This alliance will ensure every business has access to the help and support they need.

Together we have:

- ❖ Launched an integrated business support campaign to ensure every business knows how to access the support they need to restart, renew and sustain. Thousands of businesses have already accessed this support via the New Anglia Growth Hub or their local authority.

- ❖ Launched a multi-million-pound package of local funding opportunities to support the business base, short-term response, longer-term recovery, and diversification projects.

- ❖ Provided bespoke, free and impartial advice, through the New Anglia Growth Hub, to support businesses to restart, reshape their business plans and provide a programme of online training.

- ❖ Put in place a supply chain management system which has connected hundreds of businesses supplying Personal Protective Equipment directly to the frontline workforce.

Together we will:

- ❖ Expand the package of local funding opportunities and secure additional national funding for business recovery.
- ❖ Develop a supply chain matching service. Work with local companies to capitalise on opportunities to sell more goods and services locally. Secure a commitment from the public and private sector to procure more locally, creating more resilient and inclusive regional supply chains and procurement of local products.

- ❖ Launch a peer-to-peer network in early summer, which will support SMEs to adapt their business plans, adopt new technology and provide leadership and management support which in turn will help improve productivity.

- ❖ Hold a two-day online festival of enterprise providing support for and sharing inspiring stories from the Norfolk and Suffolk small business community.

- ❖ Deliver a new cohort for the Investment Catalyst, through the [Cambridge Norwich Tech Corridor](#), [InvestEast](#) and the [Low Carbon Innovation Fund](#). It will connect businesses with investors and help them access private sector funding, which can be matched with public grant schemes.

- ❖ Launch the Norfolk & Suffolk Unlimited online commercial property platform in the summer, which will promote sites to help drive new enquiries for inward investors and businesses looking for new premises, helping to kick start specific locations.



People

The fall in business output has significant implications for employment levels. Recent forecasts suggest unemployment could be between 5%-10% in quarter 4 of 2020/21. Universal Credit applications rose by 40% between March and April and under even the most optimistic scenario around 25% of those furloughed are forecast to be made redundant at the end of the 4th quarter of 2020/21.¹

The overall impact will remain very hard to tell until the Coronavirus Job Retention Scheme begins to taper off.

The impacts, in both the short and longer term, are likely to be disproportionate among the local population. People with the lowest income are most vulnerable, with a significant number of jobs at risk in occupations with relatively lower wages such as retail, tourism and food services, which are forecast to be some of the hardest hit by the economic impacts of the Covid-19 response.

Young people may be particularly affected.

Around 30% of employees aged under 25 work in a sector most affected by shutdown, compared with 13% of those over 25². The Resolution Foundation estimates that those leaving education this year will be less likely than previous cohorts to have a job in three years' time, with graduates being 13% less likely and those with the fewest qualifications 37% less likely to have a job. There is evidence that apprenticeship starts this autumn could fall by as much as 50%³.

The pandemic has affected individuals in various ways, from being furloughed to being made redundant or seeing a reduction in hours and pay or their apprenticeships and education paused. Those that have continued to work from home have had to rapidly adapt to new ways of working, many whilst home schooling, and many of our large and most affected employment sectors are also those where working at home is less possible.

While many individuals and communities have acted in solidarity in response to the pandemic, with positive benefits from this community spirit, it has also had an impact on people's mental health and wellbeing. The Voluntary Community and Social Enterprise sector will play a significant role in supporting workplace wellbeing, with much of the support employers and employees will turn to, will turn to being provided by local charities or community groups.

The rapid changes in ways of working, including an overnight shift to online working and lower-contact methods of doing business, have highlighted the importance of an adaptable workforce. The workforce requires the opportunities and capabilities to rapidly acquire these new skills, and especially those associated with online and digital working.



A number of firms, including construction company Morgan Sindall, have been supporting young people with virtual work experience.

As the economy restarts and looks to rebuild, it is important that individuals are supported to identify their transferable skills to consider moving into a different sector, and that all partners promote the range of opportunities available.

Like businesses, colleges, universities and independent training providers are facing the same challenges to reopen and adapt to new ways of working, and support will be needed to assist them to continue providing the agile and responsive training that our economy requires.

Together we have:

- ...❖ Developed and promoted an [employment opportunity](#) platform helping to plug short-term gaps in essential workforce.
- ...❖ Worked with all existing programmes and projects that invest in people and have a focus on improving employment and education opportunities, to identify how they can adapt and be agile to the changing nature and demands of the workforce.

Together we will:

- ...❖ Create a redundancy support programme which builds on and brings together existing initiatives. We will work with DWP, Jobcentre Plus and professional services to ensure employers and employees are aware of and have access to available support programmes at the earliest point.
- ...❖ Develop further the employment opportunity platform, utilising existing networks to include a redundancy triage service to help connect people to new training and employment opportunities.
- ...❖ Create a programme, building on existing initiatives, that provides employers and employees with mental health and wellbeing support.
- ...❖ Accelerate the delivery of the [Youth Pledge](#) projects, providing an integrated offer that links young people to opportunities and support to help them into education, training and employment.
- ...❖ Deliver a pilot to test innovative virtual solutions for work experience placements to help the continuation of high-quality career engagement.

- ...❖ Provide co-ordinated support that schools and colleges can draw on that enables, enhances and improves careers provision across Norfolk and Suffolk. This includes working with the Careers and Enterprise Company to expand the [New Anglia Careers Hub](#) right across Norfolk and Suffolk from September.
- ...❖ Building on investments already made in digital skills infrastructure, working with our higher and further education providers to provide a range of opportunities that enables all residents to upskill throughout their lives, including developing a digital skills programme and working with industries to scale up existing initiatives.
- ...❖ Reshape existing apprenticeship projects to help stimulate the creation of quality apprenticeships and to enable those existing apprentices who have been made redundant to be connected to new opportunities, working with businesses to show them the value of apprenticeships.
- ...❖ Work with universities to put in place tailored support for students that are due to graduate this summer, to help increase their chances of securing employment or further education.



Ideas & innovation

The pandemic has posed huge challenges to the global economy and people's daily lives with far-reaching consequences. At the same time, this universal period of disruption has been a strong driver of creativity, collaboration and innovation that we want to build into our restart and renew activity.

Universities, businesses and individuals are adapting quickly to reinvent presence, productivity, learning and commerce. New technologies, products and processes have been developed at pace to support the pandemic effort including rolling out of testing, tracking and tracing, and developing AI systems to support rapid vaccine development.

Many firms have rapidly pivoted business models to capitalise on new opportunities and facilitate their economic and education systems to move online.

Whilst many businesses are facing challenging times, where innovation might not be a high priority, this recent disruption demonstrates how critical it is to invest in research and development and continue to develop the tools and technologies needed for a resilient economy and healthcare system. Partnerships with universities and support for commercial development of new ideas and techniques are more important than ever.

There have been many new opportunities emerging for financing innovation, but some businesses are experiencing difficulties in accessing and understanding them. In addition, innovation is an inherently collaborative process with many new engagements not taking place during the lockdown.

Together we have:

- ...❖ Launched the £2m [Growth Through Innovation Fund](#) to invest in a research and development or innovation project that supports growth and helps businesses to diversify or develop new products.

Together we will:

- ...❖ Launch the Reimagine Challenge, a collaborative programme delivered through the [Cambridge Norwich Tech Corridor](#) with [Norfolk & Suffolk Unlimited](#). It will bring the region's brightest thinkers together to help find commercially viable solutions to some of the challenges facing our high streets and urban centres in the coming weeks and months.
- ...❖ In July, launch the New Anglia Innovation Mentoring programme, which will provide high quality advice and mentoring to businesses, ensuring they have access to the resources they need to be successful

when bidding for innovation funding, including existing and new opportunities with Innovate UK.

- ...❖ Deliver an exciting programme of Innovation Forum events, which will connect businesses and public sector partners to meet challenges and explore opportunities for cross-sector innovation, funding and business support and public sector opportunities.
- ...❖ Deliver an Innovation Marketplace. Working with partners including BT, to explore commercialisation opportunities for dormant patents. Artificial Intelligence technologies will be opened up for partnership and licensing to the region's key industries such as clean energy and manufacturing.



Digitalisation holds a number of innovative opportunities for a wide range of businesses.



Infrastructure

Places and communities are interconnected, depend on transport links, and draw on many of the same labour markets and supply chains. The pandemic has demonstrated the need for resilient and adaptable infrastructure. It has changed the way businesses and communities use services and the infrastructure needs to support these changes.

Traffic flows dropped to a fifth of normal levels on the major road network, water and energy use shifted with a new afternoon peak and the trend for homeworking has accelerated. With many local authorities declaring climate change emergencies and more committed to low carbon growth, there is an opportunity to accelerate the transition to a greener economy, embedding these adaptations and practices.

Existing infrastructure and services need to adapt to support people to get to work and into education given the need for social distancing and advice to avoid public transport where possible. This is an opportunity to maximise environmental impact through infrastructure that provides and supports increased walking and cycling, green spaces and a shift to online services and homeworking.

Digital infrastructure and skills are going to be an integral part of the restarting and renewing of the economy, as individuals and business adapt to new ways of working and

trading. Internet service providers report traffic in fixed networks has increased significantly during weekdays, with the largest amounts of data ever transmitted. In some sectors there has been a large-scale switch to homeworking and the benefits such as cost savings have been recognised.

Some businesses have moved quickly to selling their products and services online. Working with Government to fulfil and accelerate its pledge to bring ultrafast broadband to all homes and businesses is vital to enable businesses to become more innovative and resilient as they too look to the future.

Making the case for more private and public investment, and identifying and rolling out where the complementary 5G and Fibre To The Premises (FTTP) initiatives can address any holes in coverage, will be an integral part of our recovery plan.

Together we have:

- Secured £737,000 through the first phase of the Emergency Activity Travel Fund and £1.5m from the Reopening High Street Safely Fund to implement measures that will help make it easier and encourage people to choose alternatives to public transport when they need to travel, and provide consumers with a positive experience when shopping in our high streets.

- Submitted a compelling multi-million-pound bid to Government Local Growth Fund 4, following its call for capital projects which would help to stimulate the economy over the next 18 months.
- Published an infrastructure plan which sets out the connectivity infrastructure improvements that will enable productivity gains and clean growth in Norfolk and Suffolk.

Together we will:

- Deliver the existing portfolio of infrastructure projects which will help support and minimise the impact of the local construction sector.
- Accelerate the delivery of integrated transport priorities that reduce the need to travel and encourage modal shift, and identify the most critical transport actions to restart the economy and set up a strong and sustainable rebuild.
- Accelerate the roll-out and take-up of superfast broadband, raising business awareness of its availability and schemes like the [Gigabit Voucher](#), which enables residents and local businesses to join up and approach a supplier directly to install a gigabit-capable connection.



Places snapshot



Population¹

Norfolk
903,700

Suffolk
758,500



Business base²

Norfolk 88% micro,
10% small,
1.7% medium,
0.3% large

Suffolk 89% micro,
10% small,
1.5% medium,
0.4% large



Workforce furloughed³

Norfolk 97,800
(27.1%)

Suffolk 85,600
(26.8%)



Office property vacancy rates (Q2 2020)

Norfolk 1.8%
(1.5% in Q4 2019)

Suffolk 2.9%
(3% in Q4 2019)



Small business grant payments⁴

Norfolk
19,997 (£229m)

Suffolk
12,879 (£148m)



Universal credit claimants⁵

Norfolk 23,310
(33% under
the age of 29)

Suffolk 18,925
(32% under
the age of 29)



Our place

Much of the detailed work to support communities and businesses will be led by Local Authorities, from reopening town centres to running support grants, rethinking services and supporting the most vulnerable.

Local councils in Norfolk and Suffolk have been playing a leading role in the public health response and have innovated and rapidly adapted to new ways of working. Some have already published immediate recovery plans and more will do so in the weeks ahead.

This section sets out some of the things that they will be doing that reflect the very different needs of our towns, city, rural and coastal areas.

*The Winerack,
Ipswich*



*The Forum,
Norwich*



*Cyclists in
Breckland*



*Great Yarmouth
harbour*



*Guildhall,
King's Lynn*



*Cromer Pier, North
Norfolk*



*Quadram Institute,
Norwich
Research
Park*



*Boats in
Broadland*



Sudbury



*Felixstowe
Port*



*Bury St
Edmunds*



*Wells-next-the-Sea,
Norfolk*



*New social distancing
signs, Stowmarket*



Norfolk County Council

Norfolk is an ambitious county with the space and capacity to deliver substantial new growth, e.g. in our key clean energy, advanced manufacturing, agri-food and digital sectors.

Together for Norfolk (TfN), the County Council's business plan to 2025, outlines the vision for Norfolk, a place where all have the chance to contribute to and benefit from economic growth and regeneration, while protecting and enhancing our unique environment through managed development. We are achieving these aims through close working with local partners and Government.

Our challenge is to respond to the current economic conditions in the context of TfN, recognising that the extent of the impact is not yet known. However, we know that key sectors and many people are significantly affected. We are therefore developing a Norfolk Delivery Plan, which will evolve with the evidence and have a strong focus on social inclusion, as well as retaining the environmental benefits arising from the pandemic.

Actions:

- ❖ Help as many businesses as possible to survive, and as many people as possible to stay in work or secure alternative work or training.
- ❖ Drive the identification, development and promotion of clean growth opportunities, such as the Offshore Wind Operations and Maintenance Base in Great Yarmouth.
- ❖ Create the significant Norfolk Strategic Fund to kickstart recovery projects.
- ❖ Focus on local markets and supply chains, as well as where public money is spent locally.
- ❖ Promote the county as a safe place to live, work and visit – one that is open for business.

Suffolk County Council

Suffolk has many economic strengths with global reach, from clean energy and agri-food/tech to ports and logistics, digital/technology and beyond: all making a significant contribution to the UK economy. Its natural capital makes it a great place to live, work and visit.

The Council is working with local partners and Government to help Suffolk fulfil its economic potential sustainably, enabling as many people and places as possible to contribute and benefit, including people who are vulnerable and facing disadvantages.

The Council is committed to tackling climate change, supporting vulnerable people and enabling thriving communities. Inclusive, sustainable growth is vital. Given the social and economic impacts of the response to Covid-19, these become even more important for Suffolk's people, environment and economy.

Actions:

- ❖ Seek opportunities for clean and inclusive growth in renewing the economy, so no one is left behind.
 - ❖ Work with partners to develop education and skills opportunities that help people reach their potential.
 - ❖ Lead by example by supporting our own staff and helping businesses support their workforce to be healthy and resilient.
 - ❖ Use our assets and work in partnership to deliver safe and appropriate homes.
 - ❖ Work with communities to help them be connected and sustainable as well as supporting the most vulnerable.
- More detail is in our [Business Plan for 2020-21](#). The Council is developing its own recovery plan and contributing to Suffolk's collaborative plans (e.g. Suffolk Growth Framework) under the resilience forum recovery arrangements. These will form the basis for longer-term strategies for reform and reset.

Ipswich Borough Council

Ipswich is the County Town of Suffolk. The town has a diverse and innovative urban economy, while historically having high levels of inequality and low salaries.

Covid-19 has exacerbated the challenges the town faces in the retail, hospitality, tourism and culture sectors. It is unclear at the moment whether this will be temporary or permanent.

The challenge now is to revive the town, while ensuring that this happens inclusively and sustainably. Investment through the Town Deal and other funding streams will complement existing collaborative work towards a shared vision of a dynamic town.

Actions:

- Continue work with [Ipswich Vision](#) partners – and primarily our BID, Suffolk Constabulary and Suffolk County Council – to implement physical measures and signage in the town centre to support social distancing and safety.
- Review the Ipswich Economic Strategy to identify any actions required to respond to Covid-19.
- Deliver the Town Investment Plan and bid for Town Deal funding in line with (anticipated) Government guidance.

Norwich City Council

Norwich is the urban centre of Norfolk, driving significant regional economic and educational activity to stimulate growth and innovation, and to enrich the labour market within Norwich, across the LEP area and beyond. The city experiences high levels of inequality and low-wage workers.

The challenge is to revive the city as a thriving economic engine, despite clear supply-side challenges and demand for its strong retail, culture, hospitality and tourist sectors being suppressed temporarily or permanently (with the advent of mass homeworking and online retail), whilst ensuring that this happens inclusively and sustainably. Investment through the Town Deal and Transforming Cities will complement existing collaborative work towards our shared vision of a connected, creative, dynamic, fair and liveable city. Read the city's [Blueprint for Growth](#).

Actions:

- Continue to work with Norwich BID, Norfolk Chambers of Commerce, police and County Council to implement physical measures and signage in the city centre to support social distancing.
- Establish the Good Economy Commission as a key forum to make recommendations across the City Vision partnership to support an inclusive recovery.
- Use licensing powers to support businesses – particularly those in the hospitality sector – to vary use of outside space over the summer, while ensuring people with disabilities can continue to access and move around the city safely.
- Consider how Norwich City Council as an anchor institution can support an inclusive economy through its assets, contracts, recruitment and procurement.
- Review the Norwich Economic Strategy 2019-24 to identify any actions required to respond to Covid-19.
- Deliver the Town Investment Plan in line with Government guidance to drive economic recovery.

Breckland District Council

In Breckland we are braced for significant economic challenges, particularly with a concentration of businesses in hard-hit sectors including manufacturing, underlying skills challenges and risks around supply chains and labour.

However, we still anticipate significant opportunities ahead. We have already created the platforms for substantial growth by leading public and private partnerships around key growth sites. These will drive forward thousands of new homes and new business opportunities in areas like Snetterton and Thetford. Now, as a result of the changes brought about by Covid-19, we will continue to lead around growth opportunities across the District, and ensure they are well-placed to support the needs of the future economy.

Actions:

- Work with business and partners to unlock the economy safely and positively, including enabling physical changes on high streets, and supporting upskilling where necessary.
- Follow a twin-track approach to maximising survival and job retention, whilst also enabling growth and regrowth on the principles of 'building back better' and finding opportunity to create a more inclusive Breckland economy with the skills to grow.
- Mobilise the whole Council in response to the economic challenge, and ensure our regulatory powers are directed at enabling survival and promoting growth.
- Continue as Leaders of Place, establishing Town Delivery Plans and working in partnership with key stakeholders to ensure our Towns are places where residents and businesses thrive
- Inform all our actions by constant dialogue with business and partners, to track needs and issues and design business support solutions collectively.

Great Yarmouth Borough Council

The Borough's economy is vulnerable to the impacts of the Covid-19 crisis. Three key industry sectors (based on employment numbers / GVA) have been severely impacted by movement restrictions, social distancing measures and changes in consumer spending.

Great Yarmouth has the second-largest visitor economy in Norfolk, valued at approximately £635m in 2018. Great Yarmouth's tourism, leisure and hospitality businesses faced unprecedented reductions in spending. Movement restrictions came into force just before Easter, when the season begins. Most businesses in this sector rely on income generated in the 12-week season for the whole year.

The crisis has also accelerated the decline in high street retail and the viability of the town centre. Consumer spending dramatically shifted online, exposing the vulnerabilities of high street independent shops against online competitors. Energy businesses have experienced a downturn in investment and are particularly exposed.

While devastating, the impact of the crisis has highlighted the importance of key investment projects, accelerating progress. Each programme has been rigorously challenged against the impact of Covid-19. The delivery of focused, strategic regeneration in Great Yarmouth is needed now more than ever, and at the heart of these changes are the aspirations of individuals, communities and businesses.

Actions:

- Maximise the use of the Future High Streets and Town Deal schemes to address and respond to the underlying challenges to town centre vitality.
- Work in partnership, developing interventions supporting key sectors such as the Tourism Sector Deal.
- Develop an Offshore Operations and Maintenance base to create higher value jobs.

Borough Council of King's Lynn and West Norfolk

King's Lynn is a commercial and service hub for a large rural hinterland with a historic centre and port, and is a net importer of workers from the wider area.

In this recovery context, King's Lynn and West Norfolk's largest producing (manufacturing) and employing (retail) sectors could experience around a 50% contraction in Q2 2020 (based on OBR national projections). The area's prominent tourism sector (accommodation and food services) could be one of the worst hit (85% decline). The area's second highest employing sector (health) is one that is projected to expand rather than contract, with a 50% growth in output.

The local picture is very mixed and there are some manufacturing and construction-related businesses that are doing very well and avoiding any contraction.

Actions:

We will seek to use recent Government funding for towns and communities, as well as short-term recovery funding opportunities, to:

- Provide people with the learning opportunities they need to progress and retrain, raising aspirations and earnings and meeting identified demand for higher skills, with a particular focus on young people's progression.

- Regenerate and repurpose the high street and brownfield land: building high-quality homes and premises for people to live and work; tackling market failure and stimulating private investment to meet new demand for premises from start-up and growing businesses.
- Increase enterprise and the number of businesses, strengthening collaboration to enable more businesses to recover, innovate and thrive.

North Norfolk District Council

North Norfolk has a diverse economy, with many long-established food processing and manufacturing businesses. It is also heavily dependent on the visitor economy, which in 2018 comprised 29% of the District's employment, providing £511m from 9.6m trips.

Through marketing and investment in infrastructure, visitor numbers are increasing throughout the year but spring and summer still account for the majority of trips and spend. The value of staying visitors is significantly higher than day trippers, which in 2018 accounted for more than a third of tourism spend.

The visitor economy is critical to the sustainability of retail and hospitality businesses in and around the seven market and resort towns.

The District has high levels of employment among people of working age, but local wages and incomes are below England and East of England averages.

The District's population was also vulnerable to this crisis, with 33.2% aged 65 or over.¹

Actions:

- Protect the safety of customers and employees as they return to businesses in our town centres, resorts and attractions.
- Develop a campaign to: reassure local people that measures are in place to assuage public health concerns; support local businesses in their efforts to recommence trading; and promote the destination to visitors beyond this summer.
- Evaluate the opportunities, environmental gains and benefits to the rural economy of the changed patterns of movement and new ways of working, and identify investment needed to propagate this.
- Support those experiencing economic hardship as a result of impact on the local economy.

1: <https://www.north-norfolk.gov.uk/tasks/economic-growth/find-out-about-the-economy-of-north-norfolk/>

South Norfolk Council

Due to the historical strength of the Broadland and South Norfolk economies, and the fact they are not dominated by any one sector that is particularly vulnerable to the impact of the pandemic, we are optimistic our path to economic recovery will not be as difficult as in other areas of the country.

Nevertheless, as two councils working together, we are 100% focused on the immediate stabilisation of our businesses, and we are:

1. Offering bespoke advice and support to every business who wants it, helping them to chart a course through the crisis and beyond, and importantly ensuring they retain as many employees as possible.
2. Ensuring public spaces in our market towns, villages and high streets are clean, safe and secure places to visit and shop.
3. Ensuring every part of the council is working to stabilise and then grow the economy.

Actions:

❖ As part of our CONFIDENCE campaign we are widening pavements to ensure social distancing, installing hand sanitisers, providing additional cleaning and waste collections, introducing car-free zones for residents and visitors and providing advice via on-street CONFIDENCE teams.

❖ We are providing local businesses with free access to a network of experienced business mentors and advisors.

❖ We are flexing our regulatory, licencing and planning powers to support businesses to reprofile their financial position, and 'pivot' operations where necessary.

❖ We have established a single point of contact in the council to provide business support and advice, regardless of which service area they need to speak to.

Visit <https://www.south-norfolk.gov.uk/businesses/do-business-confidence>

Broadland District Council

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Visit <https://www.broadland.gov.uk/do-business-with-confidence>

Babergh and Mid Suffolk District Councils

We anticipate significant challenges in our local economy and we have set up internal collaborative processes to maximise our support for business. Together with our private and public sector partners, including the Suffolk Growth Programme Board, we are committed to facilitating new infrastructure, developing local supply chains and building our business skills base.

We will continue to develop our new Economic Strategy which will have a significant focus on restarting and renewing our local economy under our Places for Growth framework:

- Successful and Skilled Places for Growth
- Connected and Sustainable Places for Growth
- Innovative and Creative Places for Growth

Actions:

- Help our businesses to reopen safely, ensuring our public places and spaces can support the reopening of our town centres.
- Review opportunities for more walking and cycling across our areas.
- Contribute to swifter rollout of more FTTP ultrafast broadband to our businesses.
- Develop a growth programme for fast-tracked growth of high-value sector specialisms particularly in technology and innovation.
- Accelerate new programmes of support and create better networks in our more traditional sectors, such as care and the visitor economy.

East Suffolk Council

East Suffolk is a major economic driver with key sector strengths in clean energy, ICT, ports and logistics, agriculture and tourism.

The Council has put economic growth at the centre of its recently approved Strategic Plan, which is complemented by the East Suffolk Economic Growth Plan. We are also key partners on the Suffolk Growth Programme Board, currently reshaping the Suffolk Growth Framework, which will be a key document in setting out the Suffolk local authority approach to Covid-19 recovery.

While East Suffolk's economic strength is based on its diverse economy, the Covid-19 economic shock is having a massive impact on our visitor economy and the retail, leisure and cultural offer across our 12 principal towns. Our Town Investment Plan, revitalising town centre strategy and other plans, is being adapted in light of Covid-19 and will form part of our emerging recovery plan.

Actions:

- Be central players in the Norfolk and Suffolk recovery plans.
- Adapt our Town Investment Plan, BID development, masterplans, and overall economic and regeneration programmes to respond to Covid-19.
- Work closely with Town Councils, Suffolk County Council and local businesses/business groups to enable safe and successful reopening of towns and resorts.
- Ensure as many small businesses as possible can access the various support grants to maximise the money going into the East Suffolk economy.
- Working collaboratively with VEA, VS and our DMO to support the recovery in our visitor economy.
- Substantially extend business engagement activity to ensure our recovery plans are informed by all sectors.



Sectors at a glance

Economic activity will recover as lockdown is lifted, but the speed and degree is uncertain and will vary by sector.

As we work together to support the restart and renew of the Norfolk and Suffolk economy, we will focus activity on stabilising and renewing the foundation industries recognised in the Economic Strategy and Local Industrial Strategy, including the care and VCSE sectors.

Both the restart and renew recovery plans will show our commitment to capitalising on the area's major strengths and new opportunities in clean energy, agri-food, information and communication technology and digital creative, alongside ensuring the foundation sectors get the support needed.

All our sectors will benefit from the actions set out in the Business Environment, People, Ideas and Infrastructure sections. This section builds on these and sets out sector-specific actions.

Agri-food

Unprecedented demand at food retailers has put pressure on the food system in some areas, whereas the closure of the hospitality industry has created surplus in others.

Clean energy

The global pandemic has affected both the supply and demand for energy.

ICT digital

The lockdown has led to homeworking en masse, with people looking for new ways to work, learn, shop and socialise virtually.

Visitor economy

The sector has been amongst the hardest hit, with businesses forced to stop trading just before the start of the season.

Health and social care

The pandemic has pushed the health and social care sector into the front line of dealing with the crisis. Nationally, care homes have seen high Covid-19 death rates in both residents and frontline staff, reinforcing the need for Personal Protective Equipment, correct training and capital investment.

Voluntary

The pandemic has negatively affected resources, income and funding of third-sector organisations and impacted their ability to meet objectives in the longer term while demands continue to increase.

Construction

Major construction projects have continued throughout the pandemic but there have been delays caused by issues in the supply chain.

Engineering

The manufacturing and engineering sector has played a pivotal role in the response to the pandemic, from supporting the call to produce PPE at pace to continuing a stable supply of food and drink.

Insurance

The financial and insurance services has been heavily involved in the response to the impact of the pandemic, providing economic support to struggling businesses and dealing with insurance claims for lost income.

Life sciences

Our world-leading life sciences sector has been supporting efforts for vaccine development and the manufacture of medical devices and diagnostics.

Ports

Ports have played their role as essential and critical infrastructure during the pandemic. The lockdown period saw less traffic but with spikes in activity.

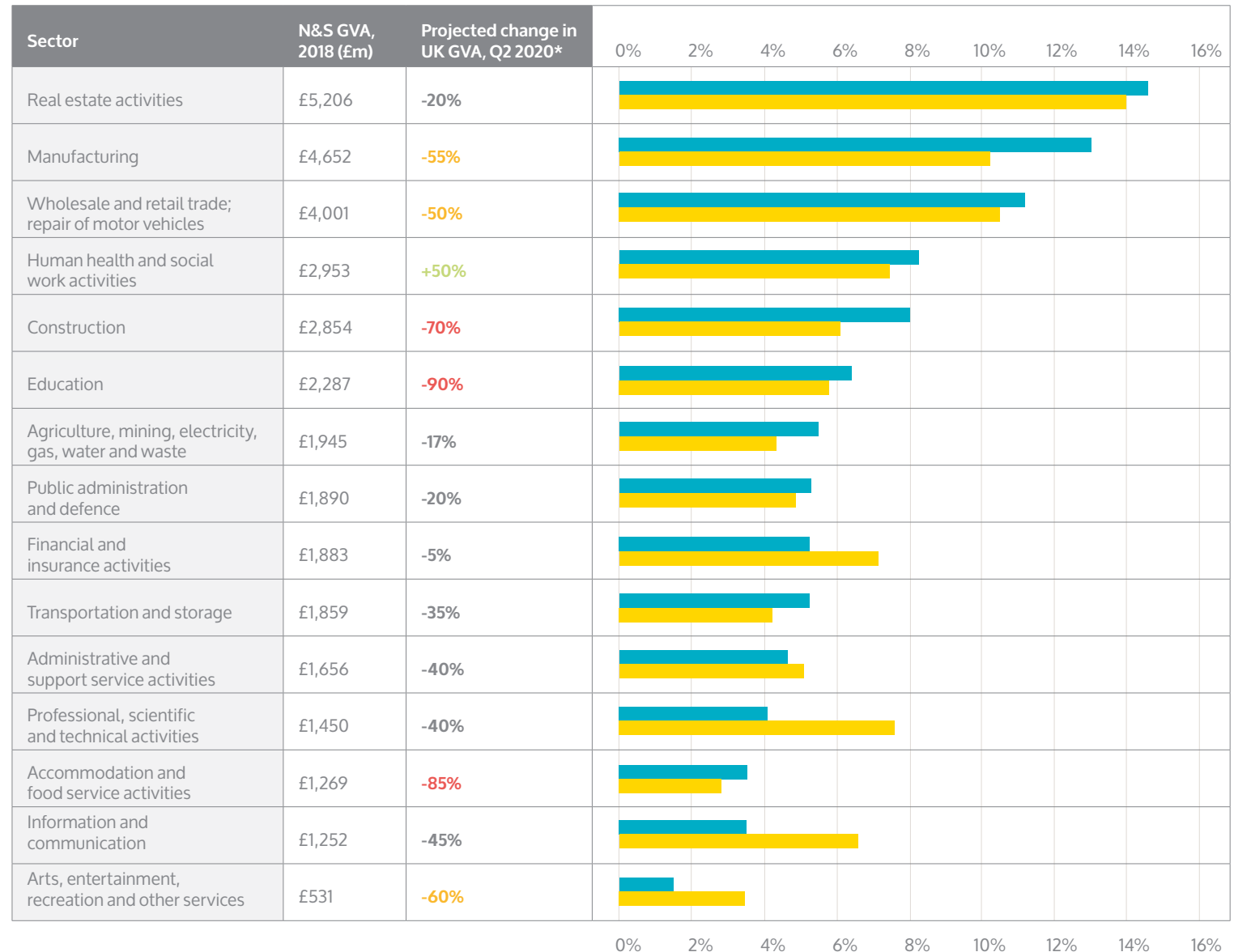
GVA by Sector

In April 2020, the Office of Budget Responsibility (OBR) published estimates on projected change in GVA by sector in the second quarter 2020 (shown right).

All sectors except for Human health and social work activities are expected to contract, Education by as much as 90%. These estimates apply to the whole UK economy. They estimate that the UK's GVA will contract by 36% in the second quarter 2020.

Using the OBR's assessments and applying these projections to Norfolk and Suffolk's particular industrial mix to provide a local picture, we find that although Norfolk and Suffolk's industrial mix is different from the national picture, the projected impact on Norfolk and Suffolk's GVA in the second quarter 2020 is similar: a contraction in GVA of 35.9%.

*The figures for GVA are calculated based on respective sector employees delivering their output, in their usual place of work. E.g. the figures for certain sectors – in particular education – will not reflect their actual activity in terms of delivering education, which has been taking place online.





Agri-food

Norfolk and Suffolk has the largest agri-food sector in the UK and world-leading research into plant and soil technology and agricultural systems. The impact of the pandemic on the sector has been complex and immediate. Unprecedented demand at food retailers has put pressure on the food system in some areas, whereas the closure of the hospitality industry has created surplus in others.

Labour challenges will remain a huge concern for growers and producers, particularly post exit from the EU. Collaborative working to promote new employment opportunities in the agri-food sector has been successful in the short-term, with growers reporting positively on their workforce arrangements.

Whilst it has presented challenges for the sector, the pandemic has increased the public's interest in locally produced food. This opportunity has been welcomed by many innovative businesses who have adapted rapidly to meet demand. However, longer-term business models are needed to sustain a local food renaissance. Collaborative working to adjust supply chains after the closure of food service has been successful, but there remain strains on the food systems while pubs and restaurants are closed.

The Agri-Food Industry Council has risen to the challenge presented by Covid-19 and the impacts on the sector. This period has embedded the principles of collaboration and partnership providing an invaluable connection across the public, private and education sectors. We will seek to build on this strong foundation, developing initiatives which enable a sustainable and resilient future, in the light of climate change and the major changes arising from Brexit.

Sector actions:

- ❖ By the summer, conclude a research project to examine opportunities and support businesses to exploit emerging food trends and consumer habits.
 - ❖ Identify and evidence the need for further specialised business support to complement the planned launch of the Food Innovation Centre in 2021.
- Building on our Norfolk & Suffolk Unlimited sector and business location campaigns:**
- ❖ Initiate a regional branding and distribution scheme, working with marketeers and wholesalers to package local brands and strengthen local supply chains, examining different business models and demand feasibility by September.

- ❖ Launch a regional promotion drive with partners in Lincolnshire, Cambridgeshire and Peterborough, outlining our significant contribution to the UK's food security and to realise the collective importance as the UK centre for high-tech, precision agriculture and sustainable food production, including robotics.
- ❖ We will continue to proactively promote agri-food job opportunities through the [employment opportunity](#) platform, and work with major employers to support them as they continue to adapt their working practices to accommodate a new workforce.



Norfolk and Suffolk has the largest agri-food sector in the UK.



Clean energy

Norfolk and Suffolk is a global exemplar for clean, low-carbon energy production, with expertise in all forms of energy generation. At the heart of the world's market for offshore wind we will continue to play a core role in the UK's transition to a zero-carbon economy.

The global pandemic has affected both the supply and demand for energy, with one of the most visible impacts being the drop in oil and gas prices and resulting contraction of the supply chain. Businesses in the oil and gas supply chain need to be supported to diversify as part of the ongoing energy transition. With large numbers of the population restricted to their homes and much commerce paused, there has been a large drop in the demand for power, with the National Grid reporting a reduction of 10%.



Norfolk and Suffolk is at the hub of the world's largest market for offshore wind power.

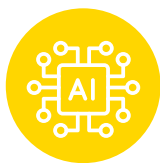
Although throughout the pandemic renewable energy, and in particular offshore wind, has remained resilient, the five-month delay to the planning process for Vattenfall's Norfolk Boreas windfarm will have impacts on businesses in the supply chain. However, with the right support, clean energy could be at the forefront of renewing the economy post-pandemic, accelerating transition to a zero-carbon economy.

The sector's ability to collaborate has been demonstrated by the work of the All Energy Industry Council, and this partnership and expertise across all energy sectors will be pivotal to the plans for recovery.

Looking ahead, Sizewell C will be one of Europe's largest engineering projects and provide significant high-quality jobs and supply chain opportunities.

Sector actions:

- ❖ Deliver the Fit For Offshore Renewables supply chain readiness programme in Norfolk and Suffolk, working with the Offshore Renewable Energy (ORE) Catapult, announcing the first cohort by September.
- ❖ Support the progress of major energy projects in the region, developing innovative and locally targeted planning and regulatory pathways, and locally funded infrastructure responsive to environmental and community needs.
- ❖ Publish an all-energy statement on sub-sector opportunities and challenges, ensuring that the opportunity for clean growth in the region is understood nationally and internationally, adding to our Norfolk & Suffolk Unlimited sector and business location campaigns.
- ❖ Work with industry to develop an all-energy capability prospectus, providing exposure to the region's supply chain companies and opportunities for those impacted to diversify into evolving markets.
- ❖ Forge relationships with world class research and innovation organisations nationally and internationally, expanding our reach to maximise on opportunities through research, technology and innovation programmes that will build on the region's ambitious sustainable clean growth agendas.
- ❖ Work with Government and other LEPs to deliver the Nuclear Sector Deal's key commitments and local ambitions, delivering a robust local supply chain for Sizewell C and building a lasting skills legacy for Norfolk and Suffolk.



ICT and digital creative

Underpinning the whole economy, Norfolk and Suffolk's ICT and digital creative sector has companies and expertise of international reach with significant potential to support economic recovery and resilience. The lockdown has thrown the digital sector into the spotlight as businesses transition to homeworking en masse, and people look for new ways to work, learn, shop and socialise virtually. Innovative digital businesses have been working in a variety of ways to fight the ongoing pandemic, from partnering with healthcare providers to deploying technology solutions free of charge.

The impacts of the pandemic on the sector seem to be mostly market-dependent, with those companies who service retail, hospitality and tourism faring worse than those that offer online services.



Norfolk and Suffolk is a hub for creative tech businesses.

Sub-sectors such as healthtech and ed-tech have seen a major uplift as people transition to using online service and home schooling. However, there are concerns about a slowdown in private investment for start-ups as many networking events have been cancelled. This will have a further impact on the ability of Norfolk and Suffolk's businesses to access the Government's Future Fund.

The pandemic has seen pressure on companies providing ICT solutions and infrastructure as businesses transition to home working simultaneously. Creative businesses in UX design, games, animation and augmented reality have seen a surge in interest as their clients look for ways to transition to online provision and engage their customers virtually. Businesses in the creative sector may have innovative solutions to challenges faced by social distancing as we begin to reopen high streets, town centres and visitor attractions. In addition, with theatres and other indoor cultural attractions likely to be some of the last businesses to reopen, the capture, streaming and commercialisation of digital content provides a cross-sector opportunity in an emerging market.

Collectively, the Digital Tech Industry Council is providing the partnerships and industry expertise to build on our digital strengths and underpin economy recovery in Norfolk and Suffolk.

Sector actions:

- ❖ Expand and develop the Cambridge Norwich Tech Corridor's Investment Catalyst which will allow businesses to secure the investment needed to scale and grow, capitalising on the new opportunities for Government funding such as Future Fund.
- ❖ Work with businesses in the creative industries, including the screen sector and other emerging specialisms, to ensure that the new market opportunities created during this period of disruption are fully exploited, including opportunities to support other sectors with recovery, virtual networking and developing a compelling investment offer to attract private sector investment and grow the cluster.
- ❖ Build on the Norfolk & Suffolk Unlimited and Department for International Trade High Potential Opportunity to drive foreign direct investment into emerging capabilities including 5G, photonics and immersive technology at Adastral Park.
- ❖ Work with Tech East to launch a Tech 100 of top businesses in the region. Scope international virtual events for these business to attend, network at, and showcase the innovations they have developed during lockdown. This will help to expose them to new opportunities and investment.



Visitor economy – culture and tourism

The visitor economy is the second largest sector in Norfolk and Suffolk by employment, after health and social care. Employing 11% of the region's workforce, the sector accounts for 89,100 jobs and contains 12% of the region's businesses.

The sector has been amongst the hardest hit, with businesses forced to stop trading just before Easter – the start of the season. Intelligence from the sector reveals the deep impact of lockdown, with high levels of redundancies and business failure projected. Businesses with large estates or overheads, such as zoos and aquariums, have been particularly affected, having to maintain operations with no income.

Continued movement restrictions and social distancing measures mean the impact is likely to be longer lasting than many other parts of the economy, with theatres and indoor cultural venues likely to be some of the last to reopen. Research shows that theatres in the region are projecting an unrecoverable gap of £10m by September 2020 and will have lost over £15m of revenue by September 2020. For festivals, all live activity for 2020 has been cancelled, causing significant financial losses across the sector and the supply chain.

As the economy begins to reopen, social distancing measures will impact on visitor capacity, hindering the ability to recover. Consumer behaviour and concerns about travelling make recovery planning challenging, as does the seasonal nature of the sector.

However, with overseas tourism (inbound and outbound) not likely to recover quickly, domestic tourism presents the best opportunity for visitors over the next year. The rural and coastal nature of the offer in Norfolk and Suffolk will be in greater demand, given their natural, cultural and heritage assets as visitors seek out alternative destinations. The sector, which is relatively fragmented, has shown extraordinary levels of collaboration and partnership through the crisis. This is a real opportunity to build back better – aiming for increased visitor numbers and spend, new technology and higher-skilled, better-paid jobs.

Culture has a unique role in placemaking, the visitor economy, inward investment, skills, health and wellbeing, and inclusive growth. The New Anglia Cultural Board will play an important role in ensuring that culture is at the heart of our economic recovery.

Sector actions:

- Set up a resource hub with latest updates and advice on opening safely to support businesses concerned about health and safety issues and develop a co-ordinated approach to reopening destinations.
- Publish a short-term recovery plan in July which brings together partners from across the sector to outline the steps needed to restart the sector.

- Undertake consumer confidence research to underpin and inform future marketing campaigns and act quickly to restore confidence and boost demand.
- Work with the Destination Management Organisations (DMOs) to join up marketing initiatives to promote Norfolk and Suffolk as safe destinations, including a campaign to 'Discover Unexplored England' with DMOs working together in an alliance, developing thematic trails and itineraries.
- Link up and collaborate with existing projects such as EXPERIENCE, Look Sideways East and Celebrating Culture 2021 to develop cultural and experiential tourism, promoting less well-known destinations and year-round attractions.
- Develop programmes which promote innovation and digital adoption as well as peer-to-peer learning to enable businesses in the sector to become more resilient and productive. Link up with existing programmes such as Collaboration: Place: Change to enhance leadership and business skills.
- Scope and bid for funding for a Destination Alliance to deliver activity in a co-ordinated and collaborative way across local authorities and DMOs. This will capitalise on the aspiration to work together, embedding long-term partnerships.
- Commission Culture Drives Growth Phase 2 in August to create the structures, plans and projects to underpin the cultural sector's recovery and maximise the role of the cultural sector in wider regional recovery.



Health and social care

Health and social care is one of the foundations of our local economy. It is the largest sector in terms of employment and plays an essential role in improving the health of populations, promoting independence and social justice. The sector is fragmented, with great diversity in business size from large care providers to SMEs providing a range of residential and homecare services.

Already struggling with skills shortages and increasing demand, the global pandemic has pushed the health and social care sector into the frontline of dealing with the crisis. Nationally, care homes have seen high Covid-19 death rates in both residents and frontline staff, reinforcing the need for access to appropriate infection control training and access to adequate and timely delivery of Personal Protective Equipment to ensure the safety of all.

There are many other factors such as unsociable hours, travel and transport issues, particularly in a large rural economy. Interestingly, the vacancy rate has fallen during the pandemic. It is true, however, that there was significant staff sickness, especially at the beginning of the pandemic, due to self-isolation.

A relatively low-pay sector, care has struggled with recruitment and retention of staff, worsened by the cumulative impact of Brexit. The pandemic has made these issues more acute, with many staff off due to illness and self-isolation and extra training needed for identification and management of Covid-19.

In addition, the sector is experiencing a slowdown as clients become cautious about engaging in external care, preferring to care for relatives themselves, impacting on income and business sustainability. With increased cost of wages and additional resources required for Personal Protective Equipment as well as training at a time when income is down, a huge burden is being placed on strained budgets with some business failure projected.

It is possible that the slowdown in demand for provision will continue, with long-term changes to the patterns of requirement for social care. Businesses operating in areas where there might be surplus provision need to be supported to pivot to adapt to new demand. Improved leadership and business management will enable care providers to become more agile and enhance the professionalism and resilience of the sector.

Partnerships across the region from our universities, research institutes and hospitals have been strengthened by working together to meet the challenges of the pandemic.

Sector actions:

- Build on partnerships with training providers and business groups to ensure access to quality and accessible training. Increase access to progression of care sector workforce at all levels through development of, or access to, relevant training, enabling a safe environment. Take steps towards developing an integrated workforce that can assist where there are gaps in services.

- Continue to establish a cost-effective and easily accessible local PPE supply chain and make it available to businesses in the care sector, linking resource to where it is most needed.
- Address the skills shortages and challenges to recruitment, capitalising on the high levels of positive public interest resulting from the pandemic, and through refocussing the sector skills plan for Health and Social Care. Develop initiatives to make the sector more accessible for younger people, providing clear career progression and pathways.
- Develop further ways of communicating digitally with the sector for peer support in different forums, building on the work of partners. Facilitate relationships with business leaders and universities to enhance management, innovation and leadership practices and adoption of digital technology.
- Work with key stakeholders across local authorities, health and Primary Care to carry out accurate and informed planning about future needs for care and responses to pandemic. Take necessary commissioning steps to encourage innovative future models for care, such as digital care based on plans to ensure there is capacity for current and future need.



Voluntary, Community and Social Enterprise (VCSE)

The pandemic has negatively affected resources and income of the VCSE sector organisations and has impacted their ability to meet objectives in the longer term, whilst the sector has witnessed increasing demand on specific areas.

The voluntary sector is extremely diverse and such diversity requires further analysis to enable the relative strengths of the sector to be optimised. For those organisations who are actively engaged or else aspire to help drive the ambitions set out in the Economic Strategy and Local Industrial Strategy, they need to re-envision their offering in the current climate.

It is important that business resilience best practice is shared across the sector, taking advantage of collaborative working, to increase impact, the new and adapted models of working and increasing use of technology and digital delivery. With the prospect of unemployment levels increasing, the sector is uniquely positioned to play a key role in getting the economy restarted through multiple contributions towards work readiness, but needs investment to span this divide.

The sector is embedded across all of our communities. It will help to get people back into work and overcome the personal trauma of the crisis, by helping to build confidence, identifying opportunities for basic skills acquisition and improvements in health and wellbeing for all individuals.

The sector is well placed to ignite employment opportunities across the spectrum. The sector is a key provider of jobs, skills development, experience and ongoing training, including through volunteering. For example, it will play a strong role in removing barriers for those furthest from the labour market and supporting both young people who have been disproportionately affected through opportunities to enter employment, as well as the increasing number of midlife job seekers in gaining skills to open new areas of employment by working collaboratively with all sectors, notably the health and social care and skills sectors. Support is required to create jobs and train through enhanced links with employers and providers in the private sector.

Sector actions:

- ❖ Develop a VCSE sector-facing offer for the New Anglia Growth Hub, so organisations have access to relevant business support, which includes management support, mentoring, networking and restarting under social distancing, alongside the support they receive from VCSE sector umbrella organisations, to enhance their internal resilience.
- ❖ Deliver the roadmaps and agreed courses of action for the local VCSE sector umbrella organisations, which will include supporting better communication between VCSE sector organisations and building on collaborative work, initiatives and programmes.
- ❖ Link up the financial, legal, and ICT and Digital sectors with the VCSE sector to support the digitalisation of services, which can assist with remote working and online delivery as more resources come back.
- ❖ Encourage commissioners/funders to accept that new ways of working such as online operational delivery are recognised as eligible activity alongside face-to-face delivery.
- ❖ Move further towards public sector whole-system thinking and commissioning, with greater consideration given to how public sector commissioning impacts upon the wider local economy – securing social, economic and environmental benefits.
- ❖ Develop a Sector Skills Plan for the VCSE sector, which recognises the sector's significant offer to the wider business community through meaningful skill acquisition. To create a professional, responsive, evolving, fit-for-purpose sector across all levels and sizes in Norfolk and Suffolk.



Construction

Norfolk and Suffolk has a large and diverse construction sector, with an emerging specialisation in modern methods of construction and sustainable design. Major construction projects have continued throughout the pandemic but there have been delays caused by issues in the supply chain. Low-carbon developments and circular economy principles in housing will form a major part of our recovery and renewal.

Caution to invest in new office developments after the shift to homeworking and a potential slow-down in the housing market may also have impacts on the sector over the coming 12 months. However, demand for different types of housing, from specialist housing, for people with care needs, to affordable housing remains. At the same time Norfolk and Suffolk have significant infrastructure investment priorities that could benefit from Government recovery funding and provide much-needed jobs and an economic boost.

A key focus for firms is to ensure staff are safe and construction sites can operate with the right measures in place. Access to Personal Protective Equipment has been a challenge due to supplies being diverted to the healthcare front line. Nationally, the Construction Leadership Council has worked collaboratively to establish a 'Roadmap to Recovery' which has been endorsed by local partners.

Sector actions:

- Work with local firms to deliver the existing portfolio of infrastructure projects which will help to support and minimise the impact on the local construction sector.



We will work with local firms to deliver the existing portfolio of infrastructure projects.

- Work with business networks to ensure businesses have the right information and tools they need to ensure the safety of their workforce, linking them to the Personal Protective Equipment supplier database.
- Work with industry and regulatory authorities to encourage the use of different and more sustainable materials to ease supply chain pressure.
- Support and promote innovation in the sector, including demonstrator projects to move towards more sustainable approaches to development.
- Work with the Construction Industry Training Board (CITB) with its National Construction Centre at Bircham Newton, and all local FE colleges and training providers to support apprentices and trainees in the industry.
- Examine local planning and other regulatory functions to enable the acceleration of housing and other construction projects.



Engineering and manufacturing

The engineering and manufacturing sector has played a pivotal role in the response to the pandemic, from supporting the call to produce Personal Protective Equipment (PPE) at pace, to ensuring a continued and stable supply of food and drink.

As the economy reopens, manufacturing and engineering companies are developing innovative solutions to enable businesses to keep their workforce as safe and productive as possible.

The pandemic has had complex impacts on the sector, with businesses reporting varying levels of impact on their operation dependent on which sectors they serve. Manufacturers in the aerospace industry have lost a large proportion of orders and income, while other areas of the sector have seen an uplift.

Managing a workforce in the face of fluctuations in demand is an issue for many businesses. In addition, the pandemic has interrupted the international supply chains, with some raw material redirected for the manufacture of PPE or stockpiled by other countries.

There is concern that the disruption on the supply chain will be long-term as other nations seek to onshore more of their manufacturing base. Building on the work developing PPE manufacture locally, resilient supply chains need to be formed in other areas by adopting a 'buy local' approach. Businesses in the region are keen

to collaborate, share staff resources and find solutions to new market opportunities and challenges.

Sector actions:

- ❖ Work with potential manufacturers of prioritised PPE and return-to-work equipment to understand scale-up or diversification challenges and support interventions. Develop a support package for the most viable proposals and match with the long-term demand from across the economy.
- ❖ Deliver the Engineering Success project, a collaboration between New Anglia LEP, NAAME, UEA and the Cambridge Norwich Tech Corridor, to strengthen and support the region's emerging engineering and manufacturing cluster, increase collaboration between businesses and strengthen the sector's investment proposition.
- ❖ By the autumn, publish an impact-based development plan to build the region's manufacturing clusters, leading to a sustainable recovery and resilient sector.
- ❖ Launch a pilot of the Talent Sharing Platform by September: a novel tool to support businesses to share workforce and fuel new employment opportunities.
- ❖ Deliver the [Productivity East](#) project: a new regional hub for engineering, technology and management at the University of East Anglia. Although work on site was temporarily suspended during the pandemic, the new state-of-the-art facility will open to students in January 2021 and will provide the technical talent and leaders of tomorrow.



Staff at Vanilla Electronics in Thetford.



Financial and insurance services

The financial and insurance services have been heavily involved in the response to the impact of the pandemic, whether through providing economic support to struggling businesses or dealing with insurance claims for lost income. The impact of the pandemic has presented operational challenges for businesses in the sector, with cyber security a big concern with so much of the workforce operating from home.

Companies in the sector report concerns on behalf of their clients as debt burdens rise (and possible defaults) as the world enters recession caused by the pandemic. The sector reports major concerns resulting from the financial impact including liquidity and capital resources.

Financial professionals have a lot of expertise that could be used to support many business sectors.

Sector actions:

- ❖ Ensure that financial and insurance businesses have access to the latest support and advice, working with industry groups including Financial Industry Group (FIG) in Norwich and Financial Insurance and Professional Services (FIPS) in Ipswich.
- ❖ Work with partners including the FIG to leverage networks and host events and information sharing, including webinars, networking and training in cyber security. Establish measures to allow for remote working, providing opportunities for cyber security professionals to meet and exchange knowledge about potential threats.
- ❖ Explore ways of mobilising pro bono support from financial and legal professionals, such as speaking at cross-sector events or working with VCSE sector organisations to support resilience and financial planning for communities, individuals and other sectors.



The iconic Willis building in Ipswich is home to insurance brokers Willis Towers Watson.



Life Sciences and biotech



The Norwich Research Park is a world-leading centre for research into the microbiome.

The importance of science and health has been clearly demonstrated through the need for rapid vaccine development and manufacture of medical devices and diagnostics. Public attention has never been higher.

With international expertise in the fields of food, health and the microbiome, and an advanced cluster of animal health and emerging pharmaceutical manufacture on the Cambridge-Norwich Corridor, the life sciences and biotech cluster has taken a leading role in the response

to the pandemic. Norwich Research Park has played a central role in increasing regional Covid-19 testing. Our combined expertise in this sector is core recovery, restart and renew capability for the region and beyond.

The sector in Norfolk and Suffolk has a large SME base, which is agile and has adapted well to new ways of working. However, businesses relying on external investment to develop new products are seeing delays to get to market and commercialisation. Those offering non-core products and services to the NHS have seen

a downturn as the focus has been on response to the pandemic. In addition, the lack of opportunities for business development, meeting investors and building international relationships may impact on the pipeline of new products and services.

Sector actions:

- ❖ Capitalise on increased public awareness and attention to life sciences and biotech – showcasing the careers available locally and increasing the talent pipeline.
- ❖ Work collaboratively across the sector to identify opportunities arising from the pandemic and the UK's departure from the EU, addressing barriers to innovation in the sector such as complex contracting, which can make it difficult for new companies to break into supply chains.
- ❖ Create a clear narrative for the region's excellence in life science and enhance relationships with surrounding areas to ensure investment comes to the region, using the Norfolk & Suffolk Unlimited brand. Develop a plan for the region to grow as a manufacturing base, taking into consideration workforce availability, commercial space and support network for companies.



Ports and logistics

Ports and airports have played their role as essential and critical infrastructure during the pandemic.

Norfolk and Suffolk have the closest ports to the four high-growth export markets of Belgium, Denmark, Germany and the Netherlands and is the main gateway for container trade with countries beyond Europe. Norfolk and Suffolk companies are already exporting their expertise to Asia, North and South America and the Middle East, so are perfectly positioned as vital gateways for economic success.

Norwich International Airport provides fast connections to Europe and beyond as well as to other UK cities. It is also the main base for aviation access to nearby North Sea gas, oil and renewables installations.

The lockdown period saw less port traffic but with spikes in activity; despite this, the maritime sector remained resilient. Airports have had to adhere to restrictions on travel including the 14-day quarantine period for new arrivals to the UK, and this has seen a greatly reduced commercial flight schedule.

In the restart phase ports, airports and logistics are facing challenges relating to cash flow, access to supply chains and the logistics of border restrictions and running operations whilst maintaining social distancing.

Through the restart and renew phases of recovery it will be important to enable our ports to be centres of development and sustainable growth. The Government's Freeports programme recognises the potential for ports to play a wider role in the economy by supporting manufacturing and logistics, identifying new ways of working and technology that can advantage the whole supply chain and benefit those coastal communities in deprived areas.

Sector actions:

- ❖ Enhance the capacity and capability of Norfolk and Suffolk's ports with a series of planned ambitious projects to attract and capture investment in operations and maintenance, manufacturing and construction.
- ❖ Support the creation of a regional freeport, developing Felixstowe as an exemplar for Blue Tech driving sustainable innovation across the maritime and logistics sectors. Deliver a virtual Blue Tech Cluster event, which will connect SMEs who have experience in innovation and technology that can support the port.



The port of Felixstowe.



*Supporting the Norfolk & Suffolk
Covid-19 Economic Recovery Restart Plan*

This Restart Plan badge will be used to help identify campaigns, events and interventions which support the delivery of this plan.

Shared with partner organisations, it will help businesses identify the actions being taken to support their recovery.



Making it happen

The way we work together is a major strength. Business leaders, local authorities, the VCSE sector, universities and colleges led by the Local Enterprise Partnership have rapidly come together to produce this Restart Plan.

We are all committed to working together to align relevant actions and investment and to put in place the support needed to get the Norfolk and Suffolk economy back on its feet rapidly, in a way that makes it more resilient and innovative, and benefits all our people. There will be different phases of recovery as lockdown will be lifted gradually. This will impact different parts of the economy at different times, meaning some response and recovery activity may run simultaneously.

The transition between response and recovery will be agile to the possibility that we may need to transition back into response if there are further lockdowns and to respond to potential issues caused by the ending of Government support packages.

Over the next 12 months, together we are committed to:

- Work with government to develop a Renew Plan that builds on the Economic Strategy and Local Industrial Strategy, ensuring the role that Norfolk and Suffolk can play in renewing the UK economy is recognised and has the tools needed to thrive.
- Enhance the shared evidence base and mechanisms to inform intervention developments, monitor progress and ensure interventions are creating the most appropriate environment to support a fast recovery.
- Develop an investment plan which brings together future government investment, alongside private sector and local funding.
- Deliver the Restart Plan and regularly report progress.

Respond

Restart

Renew

March 2020 – Autumn 2020

June 2020 – Autumn 2020

Autumn 2020 – Onwards

Respond to the economic shock from Covid-19 across Norfolk and Suffolk.

Support businesses, individuals, communities, anchor institutions, and further and higher education providers to open and start trading and living life with confidence in an environment dominated by social distancing as quickly and safely as possible.

Renew the economy, building on the Economic Strategy and Local Industrial Strategy and respond to long-term changes brought about by the pandemic, making advances where possible.



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NEWANGLIA
 Local Enterprise Partnership
 for Norfolk and Suffolk

