



GREATER BRIGHTON ECONOMIC BOARD

**26 MARCH 2019
10.00AM**

**THE PEOPLE'S PENSION STADIUM, WINFIELD WAY, CRAWLEY,
RH11 9RX**

AGENDA



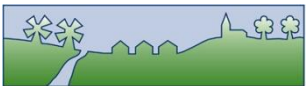
ADUR & WORTHING
COUNCILS



Brighton & Hove
City Council



Lewes District Council



MID SUSSEX
DISTRICT COUNCIL

Title:	Greater Brighton Economic Board
Date:	26 March 2019
Time:	10.00am
Venue	The People's Pension Stadium, Winfield Way, Crawley, RH11 9RX
Members:	<p>Councillors: Wall (Chair), Humphreys, Janio, Lamb, Parkin, Smith and Yates</p> <p>Business Partners: Alison Addy, Steve Allen, Trevor Beattie, Prof. Debra Humphris, Nick Juba, Dean Orgill, Andrew Swayne, Prof. Adam Tickell and Henry Powell</p>
Contact:	<p>John Peel Democratic Services Officer 01273 291058 john.peel@brighton-hove.gov.uk</p>



University of Brighton



YOUR
LONDON
AIRPORT
Gatwick

Greater Brighton Economic Board

Kathryn Hall
CE- MSDC

Councillor Wall
MSDC

Lawyer

Secretary

Nick Hibberd
BHCC

Andy Hill
GBEB

Clare Mulholland
BHCC

Max Woodford
BHCC

Martin Randall
WBC/ADC

Peter Sharp
LDC

Nigel Stewardson
BEIS

Clem Smith
CBC

Councillor Janio
BHCC

Councillor Yates
BHCC

Geoff Raw
CE- BHCC

Councillor Humphreys
WBC

Alex Bailey
CE- ADC/WBC

Councillor Parkin
ADC

Councillor Smith
LDC

Robert Cottrill
CE- LDC

Peter Lamb
CBC

Natalie Brahma-Pearl
CE- CBC

Andrew Swayne
Chairman- A&W
Business Partnership

Dean Orgill
B&H Business Partnership

Steve Allen
C2C LEP

Henry Powell
CWS Partnership

Prof. Humphris
Vice-Chancellor
UoBtn

Prof. Adam Tickell
Vice-Chancellor
UoSx

Nick Juba
FE Rep

Trevor Beattie
SDNPA

Lisa Lewis
Gatwick Airport

Phil Jones

Jonathan Sharrock

Caroline Wood

Jo Havers

Alan Higgins
ADC/WBC

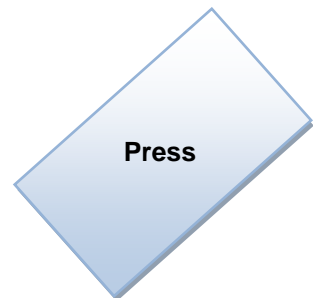
Andy Willens
ADC/WBC

Mark Healy
MSDC

Public Seating



Press



AGENDA

PART ONE

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25 PROCEDURAL BUSINESS

(a) Declaration of Substitutes: Where Members of the Board are unable to attend a meeting, a designated substitute for that Member may attend, speak and vote in their place for that meeting.

(b) Declarations of Interest:

- (a) Disclosable pecuniary interests not registered on the register of interests;
- (b) Any other interests required to be registered under the local code;
- (c) Any other general interest as a result of which a decision on the matter might reasonably be regarded as affecting you or a partner more than a majority of other people or businesses in the ward/s affected by the decision.

In each case, you need to declare

- (i) the item on the agenda the interest relates to;
- (ii) the nature of the interest; and
- (iii) whether it is a disclosable pecuniary interest or some other interest.

If unsure, Members should seek advice from the committee lawyer or administrator preferably before the meeting.

(c) Exclusion of Press and Public: To consider whether, in view of the nature of the business to be transacted, or the nature of the proceedings, the press and public should be excluded from the meeting when any of the following items are under consideration.

***NOTE:** Any item appearing in Part Two of the Agenda states in its heading the category under which the information disclosed in the report is exempt from disclosure and therefore not available to the public.*

A list and description of the exempt categories is available from the Secretary to the Board.

26 MINUTES OF THE PREVIOUS MEETING

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To consider the minutes of the previous meeting held on 29 January 2019

27 CHAIR'S COMMUNICATIONS

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For further details and general enquiries about this meeting contact John Peel (01273 291058, email john.peel@brighton-hove.gov.uk) or email democratic.services@brighton-hove.gov.uk

Date of Publication - Monday, 18 March 2019

GREATER BRIGHTON ECONOMIC BOARD

10.00am 29 JANUARY 2019

RICARDO CENTENARY INNOVATION CENTRE, SHOREHAM-BY-SEA, WEST SUSSEX,
BN43 5FG

MINUTES

Present: Councillor Wall (Chair), Humphreys, Janio, Lamb, Parkin, Smith and Yates

Business Partners: Trevor Beattie, Prof Humphris, Nick Juba, Lisa Lewis, Jonathan Sharrock, Gavin Stewart, Andrew Swayne, Prof Tickell, Peter Webb

PART ONE

18 PROCEDURAL BUSINESS

18a Declarations of substitutes

18.1 Jonathan Sharrock was present as substitute for Steve Allen.

18.2 Gavin Stewart was present substitute for Dean Orgill.

18.3 Lisa Lewis was present as substitute for Alison Addy.

18b Declarations of interests

18.4 There were none.

18c Exclusion of the press and public

18.5 In accordance with Section 100A of the Local Government Act 1972 ("the Act"), the Board considered whether the public should be excluded from the meeting during consideration of any item of business on the grounds that it is likely in view of the business to be transacted or the nature of the proceedings, that if members of the public were present during it, there would be disclosure to them of confidential information as defined in Section 100A (3) of the Act.

18.6 **RESOLVED-** That the press and public not be excluded.

19 MINUTES OF THE PREVIOUS MEETING

16.1 **RESOLVED-** That the minutes of the previous meeting held on 16 October 2018 be approved and signed as the correct record.

20 CHAIR'S COMMUNICATIONS**20.1** The Chair provided the following communications:

“On behalf of the Board I would like to welcome Professor Adam Tickell. Adam is Vice Chancellor at the University of Sussex and replaces Michael Davies who stood down from the Board in the autumn. We look forward to working with Adam, as the partnership moves into an exciting new phase.

This is going to be Peter Webb’s last Board meeting as he will be stepping down as Coastal West Sussex representative after today. On behalf of the Board I would like to thank Peter for his contribution and we wish him well in his future endeavours.

I would like to thank everyone who attended the meeting on the 11 December for their time and input. For those not able to attend the meeting, thanks for making time to visit Andy and Clare or for speaking with Chris Paddock. The meeting and other discussions were crucial in us taking a big step forward in developing the Five Year Strategic Priorities for the Board, and the paper that we are going to discuss shortly would not have been possible without all of your contributions.

I am pleased to announce that Mid-Sussex, Adur, Worthing, Crawley and the other West Sussex councils have successfully applied to take part in a new Government pilot scheme. This allows them to reinvest growth in Business Rates to support the local economy. Under the pilot scheme, councils in West Sussex will be able to retain any increase in Business Rates locally, rather than passing it to Central Government. The funding will be held in a joint pool and the aim is for Councils to invest the money in digital infrastructure to support the rollout of Full Fibre connectivity across West Sussex. It is forecast that the additional business rates retained for investment locally could be £19m in 2019/20.

The Burgess Hill Growth Area achieved a significant milestone just before Christmas when the planning application for the whole of the Northern Arc was received. A further injection to the programme was also received from the LEP in the form of £10.9m to support improvements to sustainable transport and the public realm in Burgess Hill. In December BMG Research, in partnership with the Institute of Employment Studies, were awarded the contract to deliver the Greater Brighton Business Survey. The survey represents the first time that the Board has engaged directly with the City Region business community and the aim is to survey 1,500 businesses of all sizes and across all sectors. The outputs and conclusions from the survey will help inform our future thinking in terms of business support and inward investment.

BMG Research will be undertaking the main survey in the early spring, but before that IES are undertaking desk research and stakeholder engagement to establish an evidence baseline and this will help to inform development of the main survey. This work is underway now and IES will be presenting the findings at our next Board meeting on 26 March.

The North Street Quarter development has received confirmation from the planning authority that the pre-commencement planning conditions for phase 1 of the scheme have been met. This is a big step forward in the scheme’s progress as work to prepare the ground for development can now begin. The majority of the phase 1 demolition will take place once a developer has been appointed later in the year”.

21 GREATER BRIGHTON FIVE YEAR STRATEGIC PRIORITIES

- 21.1 The Board considered a report of the Chair, Greater Brighton Officer Programme Board that presented a draft set of priorities and recommendations and proposed changes to governance arrangements based on consultation with, and feedback from, Board Members.
- 21.2 Councillor Humphreys stated that whilst he supported the majority of the proposals and analysis of the report, he did not believe that the issue of transport was given sufficient priority as one of the biggest considerations of the Greater Brighton region. Furthermore, the Board had to be move aspirational and clear on its requests as a region.
- 21.3 The Chair agreed that the Board needed to deploy a strong voice and express its ambition and he would ask officers to build this in to the Strategic Priorities.
- 21.4 Councillor Lamb stated that transport was one of the biggest constraints for his local authority area adding that he welcomed the focus on social resilience as benefit to communities must be central to the work of the Board. Councillor Lamb explained that his residents were not willing to tolerate increases in air pollution, for example and political buy-in would be achieved by sharing the proceeds of growth.
- 21.5 Trevor Beattie praised officers for the draft adding that the Board should move quickly on the delivery plan and that could be achieved by each member owning area of work and leading on that.
- 21.6 Councillor Yates stated that the report was a good start adding that he was interested to hear the view of C2C and how the report fitted and enhanced their local industrial strategy.
- 21.7 Jonathan Sharrock praised the report that he found to be excellent method of articulating the Board's role. He added that there would be two key workstreams over the next few years: an analysis of data for local authority's and the region and the development of projects and the report was strong on the latter point. Jonathan Sharrock highlighted that the key challenge to the Board was avoiding over-complication at sub-regional level.
- 21.8 **RESOLVED-**
- 1) That the Board agrees the recommendations made on page 11 of the Five Year Strategic Priorities paper, which can also be seen in 3.4 below.
 - 2) That the Board agrees to review a more detailed action plan outlining how these priorities will be delivered at the next Board meeting.
 - 3) That the Board agrees the resourcing requirements be further developed and brought forward as part of the annual budget report to the next meeting of the Board.
 - 4) That the Board agrees to review progress against agreed priorities at least annually, and review new governance structures put in place.

22 GREATER BRIGHTON INFRASTRUCTURE PANEL UPDATE

- 22.1 The Board considered a report that provided an update on the work of the Greater Brighton Infrastructure Panel established in 2018 and sought approval for the Board to explore potentially becoming a 100RC member location.
- 22.2 Councillor Janio noted that the area was highly stretched for water reserves and demand and asked when this was likely to end.
- 22.3 Ian McAulay replied that the development of infrastructure was key and through collective action, a resolution could be found in five years' time.
- 22.4 Natalie Brahma-Pearl stated that there would be implications upon water resource as a result of growth and fundamental change was required to the industry in addition to investment or development of treatment facilities.
- 22.5 Councillor Lamb agreed adding that Crawley was now above its planned population capacity and required investment in infrastructure.
- 22.6 Ian McAuley requested that Crawley Borough Council make their case to government adding that he found it perplexing that water efficiency was not currently a requirement of planning development. Ian McAuley supplemented that there was a specific need for optimal investment and future proofing.
- 22.7 Trevor Beattie welcomed the presentation adding that the technology was available to make a change and the future of farming would be fundamental to water supply and reserves.
- 22.8 **RESOLVED-**
- 1) That the Board notes the update provided by the Chair of the Greater Brighton Infrastructure Panel.
 - 2) That the Board approves the next step, which is for Greater Brighton to further explore potentially becoming a 100RC member location, as outlined in point 1.8.
 - 3) That the Board requests a further update on recommendations for the Board from the Water and Energy plans once completed with the likely date being January 2020.

23 GATWICK MASTERPLAN UPDATE

- 23.1 The Board received a presentation from Lisa Lewis of Gatwick Airport Ltd providing an update on the Gatwick Airport Masterplan.
- 23.2 The Chair welcomed the presentation as the growth of Gatwick Airport would have an important impact across the region and it was interesting to hear the proposals to mitigate effects.
- 23.3 Andrew Swayne asked what measures were being take into improve transport links to Gatwick Airport and whether there would be investment in the railway station.

- 23.4 Lisa Lewis explained that a scoping exercise was being undertaken to expand the railway station and work was underway on the widening and improvement of the M23. Baseline information had also been gathered on the future growth and how that would relate to the local transport network and the routes staff and commuters would take.
- 23.5 Councillor Lamb stated that the expansion of the station would only mitigate existing growth and in his view, additional and significant investment was required to address further growth. In addition, Councillor Lamb stated that additional expansion of the airport should not come at a cost to the quality of life to those in the Crawley area.
- 23.6 Lisa Lewis replied that Gatwick Airport were committed to putting the right infrastructure in place and Gatwick would meet the cost of that infrastructure and were keenly aware to mitigate any environmental impact.
- 23.7 Councillor Janio stated that east to west connectivity would also be an important matter and asked if any detail on that issue was available.
- 23.8 Lisa Lewis clarified that that would be an issue reviewed in the long-term.

24 GREATER BRIGHTON INVESTMENT PROGRAMME UPDATE

- 21.1 The Board considered a report of the Chair, Greater Brighton Officer Programme Board that provided a progress update on the Greater Brighton Investment Programme since the previous meeting of 16 October 2018.
- 21.2 In relation to Monks Farm, Councillor Parkin stated that planning permission had been granted and had now been with the Secretary of State for over 100 days pending a decision to call in. Councillor Parkin stated that the Monks Farm was of great economic value and was key to unlocking development at Shoreham Airport and the delay was too long. Councillor Parkin asked that the Board write to the Secretary of State on the matter asking for an expedition of the issue.
- 21.3 The Chair stated that he supported writing to the Secretary of State in principle however, the issue was a planning matter and advice would need to be sought from the relevant team on whether that was the correct process.
- 21.4 Councillor Smith stated that the purpose of the Board was to lobby the interests of the Region and he strongly supported the request from Councillor Parkin.
- 21.5 The Chair stated that ahead of making a decision on writing to the Secretary of State, officers should be involved on the appropriate course of action as he didn't want to unintentionally hinder the process.
- 21.6 The Board agreed with the suggestion of the Chair.
- 21.7 **RESOLVED-** That the Board note the report and the Investment Programme Update at Appendix 1

The meeting concluded at 11.45am

Subject:	Greater Brighton Economic Board Operational Arrangements for 2019/20		
Date of Meeting:	26 March 2019		
Report of:	Chair, Greater Brighton Officer Programme Board		
Contact Officer:	Name:	Nick Hibberd	Tel: 01273 293756
	Email:	nick.hibberd@brighton-hove.gov.uk	
LA(s) affected:	All		

FOR GENERAL RELEASE**1. PURPOSE OF REPORT:**

- 1.1 This report outlines the preparatory steps needed to support the operational aspects of the Greater Brighton Economic Board ('the Board') in 2019/20.
- 1.2 This report should be read in conjunction with the Heads of Terms ('HoTs') for the Board. The latest version of the Heads of Terms, as agreed by the Board on 6 February 2018, is attached as Appendix 1.

2. RECOMMENDATIONS:

That the Board:

- 2.1 Agree and secure the budgetary contributions sought to fund the cost of running the Board and delivering its workplan in 2019/20;
- 2.2 Note the proposed workplan outlined in the Five Year Strategic Priorities and Project paper and agree that a detailed workplan should be presented at the next Board meeting in July alongside the investment pipeline of projects;
- 2.3 Note that Brighton & Hove City Council shall continue to act as Lead Authority for the Board in 2019/20;
- 2.4 Agree the process set out at sections 3.16 to 3.18 by which the Chair of the Board shall be nominated for 2019/20;
- 2.5 Note the date by which the Lead Authority must be notified of all named substitutes and instruct any necessary actions within their respective organisations;
- 2.6 Note the date by which the Lead Authority must be notified of all nominations to the Greater Brighton Call-In Panel and instruct any necessary actions within their respective organisations;
- 2.7 Note that the Annual Report will be drafted for presentation to the Board at its first meeting in the new municipal year;

- 2.8 Agree to the proposed changes to the Boards Heads of Terms as outlined in 3.9 below
- 2.9 Note the proposal under agenda item 6 that Arun District Council is formally invited to become a constituent member of the Greater Brighton Economic Joint Committee (GBEJC), subject to the agreement and formal ratification from the Board's member organisations and note this would result in further changes to the Heads of Terms.
- 2.10 Agree to extend the contracts of the Greater Brighton Support Team (1 FTE Business Manager, 0.5 FTE Business Manager and 0.5 FTE Programme Support Officer) by 3 years, as they are due to expire in May 2020, and agree to increase the hours of the 0.5 FTE Business Manager to 0.65 FTC to deliver the workplan and further development of the Five Year Plan.
- 2.11 Agree to extend the current communications contract with the Adur & Worthing Communications Team by another year with an update on the first year's activities provided at the July 2019 Board Meeting.

3. CONTEXT AND BACKGROUND INFORMATION:

- 3.1 The budget to support the running costs of the Board in 18/19 was £300,561 (inclusive of the 2017/18 roll-over of £120,497). The actual spend as at 27 February 2019 is £242,422, which means a carry-forward of £58,139. This includes £30,000 allocated to the ESIF Business Support Programme which has been delayed due to ongoing negotiations between Chichester University and MHCLG. The actual carryover is therefore £28,139. A breakdown of the 2018/19 forecast, budgetary contributions and spend is attached as Appendix 2.
- 3.2 The underspend of £28,139 is due to unspent contingency (c.£15,000) and a reduced spend against the Skills, and Digital workstreams. This work is in progress with some projects completed by the Greater Brighton Support Team, with no additional cost to the Board. A digital mapping exercise is in progress with partners. Skills priorities for the Greater Brighton region were identified through a collaborative workshop held in the summer and the subsequent report submitted to representatives sitting on the new LEP 360 Skills Board. A number of potential projects designed to harness and maintain talent in the city region have been identified within the Five Year Strategic Priorities paper.
- 3.3 It is proposed that the underspend be rolled-over into 2019/20; with £10,000 reserved as a contingency fund and the remaining £18,139 used towards the cost of running the Board and the delivery of its workplan.
- 3.4 The suggested work-plan for 2019/20 is currently being drafted and will comprise projects based on the priorities outlined in the Five Year Strategic Priorities document shared at the last meeting of the Board. In a bid to ensure that costs for contributing member organisations are kept to an acceptable level, it is proposed that the 2019/20 contributions sought from Board members be the same as in 2018/19 (with a 2% increase in line with inflation), and that projects/activities be prioritised accordingly and presented to the Board at the next meeting in July.

3.5 In line with sections 12 and 13 of the HoTs, Brighton & Hove City Council is seeking the following contributions from the Board's member organisations:

Organisation	2019/20 Contribution
Coast to Capital LEP	£7,600.00
South Downs National Park Authority	£7,600.00
University of Sussex	£7,600.00
University of Brighton	£7,600.00
Greater Brighton Metropolitan College	£7,600.00
Gatwick Airport Ltd	£7,600.00
Adur District Council	£12,500.00
Brighton & Hove City Council	£54,400.00
Crawley Borough Council	£21,500.00
Worthing Borough Council	£19,500.00
Lewes District Council	£18,000.00
Mid Sussex District Council	£11,400.00
Total 2019/20 Contributions	£182,900.00
Carry-forward from 2018/19	£58,139.00
Total Budget for 2019/20	£241,039.00

3.6 Appendix 3 outlines the approach used in 2019/20 to develop the contributions that are being sought.

3.7 The budget to support the running costs of the Board in 2019/20 totals £163,227.00, leaving £74,976.00 for the 2019/20 workplan (including £10,000 contingency funding). It is proposed that this be allocated as follows:

3.8

Running Costs	
Salary costs (including on-costs) and expenses (inclusive of 2% inflationary rise) <i>As of 6 March 2018, Greater Brighton is supported by a full complement of staff: 1 full time Business Manager, 1 part time Business Manager (2.5 days a week proposed to move to 3.5 days per week from September) and 1 part time Programme Support Officer (2.5 days per week). This is based on a 3-year fixed-term.</i>	£105,080.40
Finance support (inclusive of 2% inflationary rise)	£7,346.17
Legal support (inclusive of 2% inflationary rise)	£10,062.24
Communications support <i>Enhanced communications support has been provided by Adur & Worthing Councils for the last year.</i>	£24,950.00
Annual report, printing and other materials	£5,000.00
Democratic Services support (administrative) (inclusive of 2% inflationary rise)	£4,287.28
Scrutiny (charged £500 (excluding venue) on a 'pay as you go' basis)	£2,000.00
Venue hire, hospitality and refreshments	£3,000.00
Additional costs e.g. IT, travel	£1,500.00
Total running costs	£163,227.00
Work Plan	
ESIF Business Support Bid <i>One-off contribution towards the 100% match-fund requirement (totalling £6m) for the region's European Regional Development Fund Business Support bid</i>	£30,000.00
Other work plan items <i>Projects to be agreed at the July Board</i>	£34,976,
Total Work Plan	£64,976.00

<i>Total Running Costs (from previous page)</i>	£163,227.00
Contingency	£10,000.00
Grand Total	£238,203.00

HEADS OF TERMS:

3.9 There are a number of proposed changes to the Heads of Terms that it is proposed that the Board agrees. These are as follows:

- I. Change to 5.1 (Membership) to reflect the recommendation in 2.1 above that Arun District Council be formally invited to join the GBEJC. This is subject to agreement of another report on this agenda and of Arun DC agreeing to join the Board.
- II. Change to 6.4 (Chair) to reflect the agreed departure from a 1-year fixed-term Chair with the requirement to rotate annually, to allowing a sitting chair to stand for re-election.
- III. Amendment to 11.1 (Time and Venue of Meetings) to reflect the current practice that Board meetings move around the City Region and do not always take place in the geographical area of the Lead Authority.

3.10 Changes to the Board Heads of Terms need to be ratified by each Local Authority Board member as per clause 14.2 of the Heads of Terms which reads as *“These Heads of Terms may be varied only on a resolution of the Board to that effect, and subject to the approval of each body represented on the Board”*

Furthermore The GBEJC is a joint committee established pursuant to section 102 of the Local Government Act 1972. The Local Government Act 1972 and The Local Authorities Arrangements for the Discharge of Functions (England) Regulations 2012 require the constituent authorities of a joint committee to decide the membership of that committee and it is therefore necessary for each of the local authority members of the Board to make an independent decision that Arun District Council should become a member of GBEJC

LEAD AUTHORITY:

3.11 On 17 April 2018, the Board agreed that Brighton & Hove City Council continue to act as Lead Authority for 2018/19. As outlined in section 1.8 of the HoTs, lead authority arrangements are reviewed every two years and therefore this arrangement is maintained in 2019/20.

3.12 In October 2019, each local authority represented on the Board will be invited to submit an expression of interest in fulfilling the role for 2020/21 – 2021/22. The Board shall then instigate a procurement exercise to select the most appropriate authority for that role.

2019/20 BOARD MEETING DATES:

3.13 The Board meeting dates for the new municipal year have been set as follows:

- 16 July 2019
- 15 October 2019
- 28 January 2020
- 21 April 2020

3.14 As in 2018/19, it is proposed that all meetings will commence at 10:00 and be held in alternating locations across the City Region.

MEMBERSHIP AND CHAIRPERSON:

3.15 Local elections will be taking place in May 2019. Seats in all Greater Brighton local authorities are up for selection and this may result in changes to the Board's make-up.

3.16 As outlined in section 6 of the HoTs, the Chair will be elected annually by the Joint Committee members. The Chair of the Joint Committee shall, by virtue of his/her democratic mandate, be the Chair of the Board. It is for the Joint Committee to elect the chair.

3.17 The Chair must be formally appointed at the Board's first meeting in the new municipal year. It is proposed that nominations be sought in advance and that the following process be adopted:

- (1) On 27 May 2019, Brighton & Hove City Council's Democratic Services team will issue an e-mail to the local authority Leaders to ask if they would like to put themselves forward as Chair.
- (2) Those local authority Leaders choosing to put themselves forward must notify Brighton & Hove City Council's Democratic Services of their decision by 10 June 2019.
- (3) On 11 June 2019, Brighton & Hove City Council's Democratic Services will issue an e-mail to all local authority Leaders, advising of the nominations and asking them to cast a vote for their preferred nominee. Each Greater Brighton Economic Joint Committee member will have one vote, save for Brighton & Hove City Council where the Leader of the Opposition will also have a vote. Voting will be completed in confidence. The deadline for votes will be 24 June 2019.
- (4) On 25 June 2019, Brighton & Hove City Council Democratic Services will issue an e-mail to all members of the Board to advise them of the new Chair.
- (5) On 16 July 2019, members of the Greater Brighton Joint Committee will formally appoint the new Chair (this will be the first item of business).

3.18 In the event that the vote is tied, Brighton & Hove City Council's Democratic Services will issue an e-mail to all local authority Leaders, informing that the first round has been tied and asking them to vote again on the preferred nominees.

- 3.19 All member organisations are required to inform Brighton & Hove City Council's Democratic Services of their substitute representatives by 25 June 2019. In line with section 9 of the HoTs, the list of substitutes will be approved by the Board at its first meeting in the new municipal year.
- 3.20 As stated in section 4.3 of the HoTs, the work of the Board shall be subject to review by an ad hoc joint local authority scrutiny panel that is managed by the Lead Authority. It is proposed that the current Call-In Protocol remains unchanged for 2019/20. The Protocol is attached as Appendix 4. Members of the Board are required to inform Brighton & Hove City Council' Democratic Services of their Greater Brighton Call-In Panel representatives by 21 June 2019.

ANNUAL REPORT:

- 3.21 As outlined in section 4.1 of the HoTs, the Board shall submit an annual report to each of the bodies represented on the Board.
- 3.22 It is proposed that the 2018/19 Annual Report be presented to the Board for approval at its first meeting in the new municipal year, scheduled for 16 July 2019.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS:

- 4.1 The proposals are in accordance with the governance arrangements agreed by the Board.

5. COMMUNITY ENGAGEMENT & CONSULTATION:

- 5.1 Not applicable.

6. CONCLUSION:

- 6.1 To ensure that the Board transitions smoothly into the new municipal year, Board members are asked to:
- (1) Agree the budgetary contributions that are being sought to fund the costs of running the Board and delivering its work-plan in 2019/20;
 - (2) Note the fact a workplan is proposed to come to the next meeting;
 - (3) Note that Brighton & Hove City Council shall continue to act as Lead Authority for the Board in 2019/20;
 - (4) Agree the process by which the Chair of the Board shall be nominated for 2019/20, and;
 - (5) Note the requirement, and instruct the necessary actions within their respective organisations, to:
 - a. Notify the lead authority of their named substitutes by 25 June 2019, and;

- b. Notify the lead authority of their nominations to the Greater Brighton Call-In Panel by 21 June 2019.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 The Greater Brighton Economic Board assists with delivering economic development across the region. The Board seeks to secure government and private sector funding and investment in order to deliver this economic development. An annual operating budget is agreed with the Board for the forthcoming financial year to enable the Accountable Body to provide legal, financial, communications and administrative support to allow the Board to deliver its work-plan. Annual contributions are made from member authorities to the Accountable Body toward this budget. The contributions from member authorities are detailed within paragraph 3.5 of this report. The apportionment of contributions from unitary, district and borough councils are based upon the size of their working age populations and are detailed within Appendix 3. The budget for the financial year 2019/20 will reflect anticipated spend for the work-streams ahead including a provision for contingency. The estimated spend of £238,203 for the year is detailed in paragraph 3.8. The forecast spend for the year also includes a sum for work plan items which are yet to be agreed as part of the Five Year Strategic Priorities. A summary of the budget for 2018/19 together with the spend incurred for that financial year is detailed in Appendix 2. A projected underspend of £58,139 is forecast for 2018/19 and this has been rolled over to support the budget for 2019/20. £30,000 of this underspend is already committed to delivering the ESIF Business Support Bid

*Finance Officer Consulted: Rob Allen, Principal Accountant
Date: 12/03/19*

Legal Implications:

- 7.2 *There are no legal implications arising directly from this report.*

*Lawyer Consulted: Joanne Dougnaglo
Date: 11/03/19*

Equalities Implications:

- 7.2 None

Sustainability Implications:

- 8.5 None

Any Other Significant Implications:

- 8.6 None

SUPPORTING DOCUMENTATION

Appendices:

1. Heads of Terms for Greater Brighton Economic Board
2. 2018/19 Forecast, Contributions and Spend
3. Approach for Calculating 2019/20 Funding Contributions
4. Greater Brighton Economic Board Call-In Protocol
5. Finance reports

Appendix 1: Heads of Terms for Greater Brighton Economic Board (6 February 2018)

1. Establishment, Purpose and Form

- 1.1. The Greater Brighton Economic Board (“The Board”) shall be established from the Commencement Date
- 1.2. The over-arching purpose of the board is to bring about sustainable economic development and growth across Greater Brighton (‘the City Region’). To achieve this, the principal role of the Board is to co-ordinate economic development activities and investment at the regional level.
- 1.3. The Board comprises the Greater Brighton Economic Joint Committee (“GBEJC”), on which the local authorities will be represented; and the Greater Brighton Business Partnership (“GBBP”), on which the Cost to Capital Local Enterprise Partnership, business, university and further education sectors will be separated.
- 1.4. Meetings of the Board comprise concurrent meetings of GBEJC and GBBP.
- 1.5. GBEJC shall be a joint committee appointed by two or more local authorities represented on the Board, in accordance with section 120(1)(b) of the Local Government Act 1972.
- 1.6. The Board may appoint one or more sub-committees.
- 1.7. For the two years starting with the Commencement Date, the lead authority for the Board shall be Brighton & Hove City Council (“BHCC”), whose functions in that capacity shall include the provision of scrutiny (see paragraph 4.3), management of the call-in and review process (see paragraph 8), and the support detailed in paragraph 12.
- 1.8. Unless the Board resolves otherwise, before the start of the third year following the Commencement Date, and every two years thereafter, the Board shall review the lead authority arrangements and, subject to paragraph 1.9, invite each of the local authorities represented on the Board to submit an expression of interest in fulfilling the role of lead authority for the subsequent two year period. The Board shall then instigate a procurement exercise to select the most appropriate authority for that role.
- 1.9. Notwithstanding the appointment of a successor lead authority pursuant to paragraph 1.8, the incumbent lead authority may retain such of their Accountable Body functions as are necessary to enable that local authority to comply with its on-going commitments and liabilities associated with its Accountable Body status.

2. Interpretation

- 2.1. In these Heads of Terms –
 - i. ‘Commencement Date’ means 1st April 2014.

- ii. 'City Region' means the area encompassing the administrative boundaries of BHCC, Adur District Council, Worthing Borough Council, Lewes District Council, Mid Sussex District Council and Crawley Borough Council as lie within the Coast to Capital Local Enterprise Partnership area; and 'regional' shall be construed accordingly;
- iii. 'economic development' shall bear its natural meaning but with particular emphasis given to :
 - Employment and skills;
 - Infrastructure and transport
 - Housing;
 - Utilisation of property assets;
 - Strategic planning;
 - Economic growth.
- iv. 'Accountable Body' means the local authority represented on the Board carrying out the function set out in paragraph 12.2.

3. Functions

3.1. The Functions of the Board are specified in paragraph 3.2 below and may be exercised only in respect of the Region.

3.2. The functions referred to in paragraph 3.1 are as follows:

- i. To make long term strategic decisions concerning regional economic development and growth;
- ii. To be the external voice to Government and investors regarding the management of devolved powers and funds for regional economic growth;
- iii. To work with national, sub-national (in particular the Coast to Capital Local Enterprise Partnership) and local bodies to support a co-ordinated approach to economic growth across the region;
- iv. To secure funding and investment for the Region;
- v. To ensure delivery of, and provide strategic direction for, major projects and work stream enabled by City Deal funding and devolution of powers;
- vi. To enable those bodies to whom section 110 of the Localism Act 2011 applies to comply more effectively with their duty to co-operate in relation to planning of sustainable development.
- vii. To incur expenditure on matters relating to economic development where funds have been allocated directly to the Board for economic development purposes; and for the avoidance of doubt, no other expenditure shall be incurred unless due authority has been given by each body represented on the Board.

3.3. In discharging its function specified in paragraph 3.2 (Viii) above, the Board shall-

- i. (save in exceptional circumstances) seek to invest funding on the basis of-
 - a Proportionality, by reference to the economically active demographic of each administrative area within the city Region;
 - b Deliverability;
 - c Value for money and return on investment / cost benefit ratio; and
 - d Economic impact to the City Region as a whole.
- ii. Delegate implementation of that function to the lead authority, who shall also act as Accountable Body in relation to any matters falling within that function.

4. Reporting and Accountability

- 4.1. The Board shall submit an annual report to each of the bodies represented on the Board.
- 4.2. The Greater Brighton Officer Programme Board shall report to the Board and may refer matters to it for consideration and determination.
- 4.3. The work of the Board is subject to review by an ad hoc joint local authority scrutiny panel set up and managed by the lead authority.

5. Membership

5.1. The following bodies shall be members of the Board:

- i. Brighton & Hove City Council
- ii. Adur District Council
- iii. Worthing Borough Council
- iv. Lewes District Council
- v. Mid-Sussex District Council
- vi. Crawley Borough Council
- vii. [Arun District Council]* **subject to confirmation by a report later in the agenda*
- viii. University of Sussex
- ix. University of Brighton
- x. Further Education Representative
- xi. Coast to Capital Local Enterprise Partnership
- xii. Brighton & Hove Economic Partnership
- xiii. Adur & Worthing Business Partnership
- xiv. Coastal West Sussex Partnership
- xv. South Downs National Park Authority
- xvi. Gatwick Airport Ltd

5.2. GBEJC shall comprise the bodies specified in paragraphs 5.1(i) to (vii); and GBBP shall comprise the bodies specified in paragraphs 5(viii) to (xvi).

5.3. Each of the bodies listed in paragraph 5.1 shall be represented at the Board by one person, save that BHCC shall, by reason of it being a unitary authority, be represented by two persons (as further specified in paragraph 5.4).

- 5.4. Each local authority member shall be represented at the Board by its elected Leader and, in the case of BHCC, by its elected Leader and the Leader of the Opposition.
- 5.5. Each business sector member shall be represented at the Board by the Chairman of that member or by a person nominated by the Board of that member.
- 5.6. Each university member shall be represented by a Vice Chancellor or Pro Vice-Chancellor of that university or by a person nominated by that university member.
- 5.7. Each further education member shall be represented by its Principal or the Chair of its Governing Body or by a person nominated by that further education member.

6. Chair

- 6.1. The Chair of GBEJC shall, by virtue of his/her democratic mandate, be Chair of the Board
- 6.2. If the Chair of GBEJC is unable to attend a Board meeting, the Board shall elect a substitute from its local authority member representatives provided that no such member representative attending in the capacity of a substitute shall be appointed as Chair of GBEJC / the Board.
- 6.3. The Chair of GBEJC for its first year of operation shall be the Leader of BHCC
- 6.4. The Chair will be elected annually by members of the GBEJC. Election of the Chair will be conducted through a formal process performed by the Democratic Services Team of the Lead Authority. The elected Chair will be appointed at the first meeting of the Board in the new municipal year. A Chair may be re-elected but shall not serve as Chair for more than 4 years.

7. Voting

- 7.1. Each person represents a member of GBEJC, and each person representing a member of the GBBP, shall be entitled to vote at their respective meetings.
- 7.2. Voting at each of the concurrent meetings of GBEJC and GBBP shall be by show of hands or, at the discretion of the chair, by any other means permitted by law, and voting outcomes reached at those meetings shall be on a simple majority of votes cast.
- 7.3. Where voting at a meeting of GBEJC results in an equal number of votes cast in favour and against, the Chair of GBEJC shall have a casting vote.
- 7.4. Where voting at a meeting of GBEJC results in an equal number of votes cast in favour and against, the motion/proposal/recommendation under consideration shall fall in relation of GBBP.

7.5. Where the respective voting outcomes of GBEJC and GBBC are the same, that shall be taken as the agreed Board decision and the Board may pass a resolution accordingly.

7.6. Where the respective voting outcomes of GBEJC and GBBP differ, the Board –

- i. May not pass a resolution relating to that matter; and
- ii. May refer the matter to the Chief Executive of the lead authority, who may consult with members of the Board or such other persons as are appropriate, with a view to achieving agreement on the matter between GBEJC and GBBP by discussion and negotiation.

7.7. Where, pursuant to paragraph 7.6(ii), agreement is reached the matter at issue shall be remitted to, and voted upon at, the next meeting of the Board.

7.8. Where, pursuant to paragraph 7.6(ii), no agreement is reached the motion/proposal/recommendation at issue shall fall.

8. Review of decision

8.1. Decisions of the Board will be subject to call-in and review in the following circumstances:

- i. Where a local authority voted to agree a recommendation at a GBEJC meeting, but the decision of the Board was not to agree the recommendation.
- ii. Where a local authority voted against a recommendation at a GBEJC meeting, but the decision of the Board considered that the interests of the body they represent had been significantly prejudiced; or
- iii. Where any local authority represented on the Board considered that the interests of the body they represent had been significantly prejudiced; or
- iv. Where any local authority represented on the Board considered that the Board had made a decision beyond its scope of authority.

8.2. The procedure for Requesting, validation, and implementing a call-in and review is specified in Schedule 1.

8.3. Where a request for call-in is accepted, the Board decision to which it relates shall be stayed pending the outcome of the call-in

8.4. Following call-in, the panel convened to review a Board decision may refer the decision back to the Board for re-consideration. Following referral, the Board shall, either at its next scheduled meeting or at a special meeting called for the purpose, consider the panel's concerns over the original decision.

8.5. Having considered the panel's concerns, the Board may alter its original decision or re-affirm it. Paragraph 8.1 shall not apply to the Board's follow-up decision. In consequence, the latter decision may be implemented without further delay.

9. Substitution

9.1. Subject to paragraph 9.2, representatives are expected to attend all meetings however, where a representative of a member of the Board is unable to attend a Board meeting, a substitute representative of that member may attend, speak and vote, in their place for that meeting.

9.2. A substitute member must be appointed from a list of approved substitutes submitted by the respective member to the Board at the start of each municipal year.

10. Quorum

10.1 No business shall be transacted at any meeting of the Board unless at least one third of all member bodies are present, and both GBEJC and GPBBP are quorate.

10.2 Quorum for GBEJC meetings shall be three member bodies.

10.3. Quorum for GBBP meetings shall be three member bodies.

11. Time and Venue of Meetings

11.1 Ordinary meetings of the Board shall be convened by the lead authority and will rotate around the City Region

11.2 The Chair of the Board may call a special meeting of the Board at any time, subject to providing members with minimum notice of two working days.

12. Administrative, financial and legal support

12.1 The lead authority shall provide the following support services to the Board:

- i. Administrative, as more particularly specified in the Memorandum of Understanding pursuant to paragraph 13;
- ii. Financial (including the Accountable body function specified in paragraph 12.2); and
- iii. Legal, comprising Monitoring Officer and Proper Officer functions in relation to GBEJC meetings.

12.2 The function of the Accountable Body is to take responsibility for the financial management and administration of external grants and funds provided to the Board, and of financial contributions by each member of the Board, as more particularly specified in the Memorandum of Understanding Pursuant to paragraph 13. In fulfilling its role as Accountable Body, the lead authority shall remain independent of the Board.

12.3 Other members of the Board shall contribute to the reasonable costs incurred by the lead authority in connection with the activities described in paragraphs 12.1 and 12.2, at such time and manner as the Memorandum of Understanding shall specify.

13 Memorandum of Understanding

13.1 Members of the Board may enter into a memorandum of understanding setting out administrative and financial arrangements as between themselves relating to the functioning of the Board.

13.2 The memorandum may, in particular, provide for –

13.2.1 Arrangements as to the financial contributions by each member towards the work of the Board, including:

13.2.1.1 The process by which total financial contributions are calculated;

13.2.1.2 The process for determining the contribution to be paid by each member;

13.2.1.3 The dates on which contribution are payable;

13.2.1.4 How the Accountable Body shall administer and account for such contributions;

13.2.2 Functions of the Accountable Body; and

13.2.3 The terms of reference for the Greater Brighton Officer Programme Board.

14 Review and Variation of Heads of Terms

14.1 The Board shall keep these Heads of Terms under review to ensure that the Board's purpose is given full effect.

14.2 These Heads of Terms may be varied only on a resolution of the Board to that effect, and subject to the approval of each body represented on the Board

Appendix 2: 2018/19 Forecast, Contributions and Spend

1. The 2018/19 budget to support the running costs of the Board and the delivery of the workplan totalled £300,561. This was made-up of the 2017/18 roll-over of £120,497 and the contributions as set out in the table below:

Coast to Capital Local Enterprise Partnership	£7,500.00
South Downs National Park Authority	£7,500.00
University of Sussex	£7,500.00
University of Brighton	£7,500.00
Greater Brighton Metropolitan College	£7,500.00
Gatwick Airport Limited	£7,500.00
Adur District Council	£12,345.00
Brighton & Hove City Council	£53,406.00
Crawley Borough Council	£21,130.00
Worthing Borough Council	£19,215.00
Lewes District Council	£17,734.00
Mid Sussex District Council	£11,234.00
Total contributions 2018/19	£180,064.00
Roll-over from 2017/18	£120,497.00
Total budget 2018/19	£300,561.00

2. The 2018/19 budget forecast was as follows:

Salary costs (Including on-costs)	£103,020.00
Finance support	£7,202.13
Legal support	£9,864.94
Communications support (Adur & Worthing Councils)	£10,500.00
Annual Report and other materials	£5,000.00
Democratic Services support	£4,203.22
Scrutiny (Charged at £500 on a 'pay as you go' basis)	£2,000.00
Venue hire & refreshments	£3,000.00
Additional costs e.g. IT, travel	£1,500.00
Total Costs*	£146,290.29
Work plan items	£120,000.00
Contingency	£34,270.90
Grand Total	£300,561.00

* Excluding contingency.

3. The actual 2018/19 spend (including all known commitments as at 25th February 2019) was as follows:

Salary costs (Including on-costs)	£97,290.00
Finance support	£7,202.13
Legal Support	£9,864.94
Communications support (Adur & Worthing Councils)	£24,950.00
Annual Report and other design/materials costs	£5,482.75
Democratic Services support	£4,203.22
Scrutiny	£0.00
Venue hire & refreshments	£3,229.79
Total Costs*	£152,222.83
Work plan items	£70,879.29
Contingency	£19,320

Grand Total	£242,422.12
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* Excluding contingency.

10.1 The budget remaining as at 25 February 2019 is £58,139. It is proposed that the remaining budget be rolled-over into 2019/20 to total £238,203 (including contingency) towards the cost of running the Board and the delivery of its work-plan.

Appendix 3: Approach for Calculating 2019/20 Funding Contribution**Total Funds sought for 2019/20 = £182,900**Greater Brighton Business Partnership (GBBP):

- Due to their being largely local authority funded, no contributions will be sought from the Brighton & Hove Economic Partnership, the Adur & Worthing Business Partnership and the Coastal West Sussex Partnership.
- All remaining Business Partnership members will be charged a 'flat fee' of £7,600.

Total funds sought from GBBP = £45,600Greater Brighton Economic Joint Committee:

- The contributions sought from the unitary, district and borough councils for the total remaining funding requirement have been apportioned in relation to the size of their working age populations. Please see the Business and Demographic Overview below.
- The contributions sought from Brighton & Hove City Council, Crawley Borough Council, Adur District Council, Lewes District Council, Mid Sussex Council and Worthing Borough Council are the same as for 2018/19 (with a 2% increase to reflect inflation)
- As a large proportion of Mid Sussex District Council's working age population is based in East Grinstead – an area this is currently outside of the scope of the Investment Programme – it is proposed that they pay 50% of their original contribution calculation and that the remaining 50% be divided equally amongst the remaining members. This is the same arrangement as in previous years.

Organisation	% of working age population (March 2018)	2019/20 Contribution Calculation
Adur District Council	7.13%	£12,500.00
Brighton & Hove City Council	38.81%	£54,400.00
Crawley Borough Council	13.66%	£21,500.00
Worthing Borough Council	12.39%	£19,500.00
Lewes District Council	11.18%	£18,000.00
Mid Sussex District Council	16.84% (8.42%)	£11,400.00
Total	100%	£137,300.00

Greater Brighton Business and Demographic Overview (April 2018) – Updated Table March 2018

Local Authority	Population (mid 2016)	Working age population (mid 2016)	VAT/PAYE Businesses (2017)	VAT/PAYE Business Units (2017)	Business units per 1,000 working age residents	% of total GB population	% of total GB working age population	% of business units in GB area
Adur	65,700	37,459	2,325	2,640	70.4	7.8%	7.1%	6.4%
Brighton & Hove	289,100	204,007	13,665	15,900	77.9	34.9%	38.8%	38.8%
Crawley	113,800	71,792	3,435	4,640	64.6	13.7%	13.7%	11.3%
Lewes	103,200	58,778	4,360	4,990	84.9	12.5%	11.2%	12.2%
Mid Sussex	148,100	88,547	7,360	8,250	93.1	17.9%	16.8%	20.2%
Worthing	109,600	65,124	3,695	4,530	69.6	13.2%	12.4%	11.1%
Totals	829,500	525,707	34,840	40,950		100%	100%	100%

All data sourced from NOMIS. Primary Data Sources: ONS Annual Population Estimates, Inter-Departmental Business Register

Appendix 4: Greater Brighton Economic Board Call-In Protocol

1. Requesting a Call-in

- 1.1. Call-in is a process via which decisions made by the Greater Brighton Economic Board (GBEB) but not yet implemented can be challenged by GBEB members and referred to an independent 'call-in panel' for consideration.
- 1.2. Any decision made by the GBEB may be called-in up to five working days from the date of the meeting at which the decision was taken.
- 1.3. Call-in may triggered by any one or more of the constituent members of the GBEB. Such a request shall be made in writing to the Chief Executive of the lead Local Authority (i.e. the Local Authority responsible for GBEB administration at the time of the call-in request) and shall include the reasons for the request and any alternative decisions proposed.
- 1.4. A request for call-in may be made by any GBEB member local authority:
 - i. where a local authority voted to agree a recommendation at a GBEJC meeting, but the decision of the Board was against the recommendation;
 - ii. where a local authority voted against a recommendation at a meeting of the GBEJC but the decision of the Board was to agree the recommendation;
 - iii. where any local authority represented in the Board considered that the interests of the body they represent had been significantly prejudiced; or
 - iv. where any local authority represented in the Board considered that the Board had made a decision beyond its scope of authority.
- 1.5. The Chief Executive may refuse to accept a call-in request which in his/her opinion is frivolous, vexatious or defamatory or where no reason for the decision to be called-in is given.
- 1.6. Should the request be accepted, the Chief Executive will call-in the decision. This shall have the effect of suspending the decision coming into force and the Chief Executive shall inform the relevant decision makers of the call-in. The Chief Executive shall then call a meeting of the GBEB call-in panel to scrutinise the decision.
- 1.7. The GBEB call-in panel must meet within seven working days of the Chief Executive accepting the call-in request. Should the call-in committee fail to meet within this period, or meet but not be quorate, then the original decision shall come into force at the expiry of the seven day period

2. The GBEB Call-in Panel

- 2.1. The GBEB call-in panel shall include members representing each of the constituent members of the GBEB (i.e. both the Greater Brighton Economic Joint Committee and the Greater Brighton Business Partnership).

- 2.2. The GBEB call-in panel could potentially also include co-opted members from other bodies. Any decision on co-option would be made annually by the GBEB.
- 2.3. Each constituent member of the GBEB shall appoint a member to the GBEB call-in panel. No member of the GBEB call-in panel may also be a member or substitute member on the GBEB – GBEB call-in panel members should be independent of the GBEB to the degree that they have not as individuals been involved in the decision that they are being asked to consider as a call-in.
- 2.4. The Chair of the GBEB call-in panel shall be appointed annually by the GBEB.
- 2.5. Appointments to the GBEB call-in panel shall be annual.
- 2.6. Substitution is permitted on to the GBEB call-in panel. However, no substitute member may be or have been a GBEB member or substitute.
- 2.7. The GBEB call-in panel shall make decisions on the basis of a majority vote. If the vote is spilt then the panel Chair shall have a casting vote.
- 2.8. **Quorum.** To be quorate a meeting of the GBEB call-in panel shall require at least one third of members to be in attendance.
- 2.9. For the purposes of call-in no distinction shall be made between representatives from the members of the Greater Brighton Economic Joint Committee and representatives from the members of the Greater Brighton Business Partnership: all members of the call-in panel will vote together.

3. Call-in meetings

- 3.1. The GBEB call-in panel will consider call-in requests at a special call-in meeting. Typically, the call-in panel will hear from:
 - i. the GBEB member who made the call-in request (where a request has been made by more than one member the Chair of the GBEB callin panel will decide whether to take representations from all the signatories to the call-in request or to ask the signatories to make a single representation). The member(s) who requested a call-in will explain why they feel the original decision was unsound and will suggest an alternative decision.
 - ii. the GBEB. The GBEB Chair (or another GBEB member or an officer supporting the GBEB at the request of the GBEB Chair) will explain why the original decision was made and will provide any additional information they feel is germane. Where the GBEB Chair is a signatory to the call-in request, then another GBEB member (or officer supporting the GBEB) shall attend the call-in meeting to represent the GBEB. This representative will be chosen by the Chief Executive of the lead authority, after discussion with GBEB members.
 - iii. Other organisations, stakeholders or members of the public may be granted the right to make representations to the call-in panel at the discretion of the GBEB call-in panel Chair. However, in general the intention should be to re-

examine the decision originally made not to hold a broader enquiry into the decision in question.

3.2. Call-in does not provide for the call-in panel to substitute its own decision for the original GBEB decision, but merely to refer the matter back to the GBEB. The GBEB can only be asked to reconsider any particular decision once.

3.3. In essence the call-in panel is simply tasked with deciding whether the decision in question should be referred back to the GBEB to be reconsidered. Therefore the only substantive decision the GBEB call-in panel can make is whether to refer the decision back to the GBEB or to let the original decision stand.

3.4. In deciding whether to refer a decision back to the GBEB, the call-in panel shall have regard to:

- i. Any additional information which may have become available since the original decision was made
- ii. The implications of any delay in implementing the original decision
- iii. Whether reconsideration is likely to lead to a different decision
- iv. The importance of the matter raised and the extent to which it relates to the achievement of the GBEB strategic priorities
- v. Whether there is evidence that the decision-making rules in the GBEB constitution have been breached
- vi. Whether there is evidence that the GBEB consultation processes have not been followed
- vii. Whether the decision taken is not in accordance with a policy previously agreed by the GBEB
- viii. Whether there might be an alternative way of dealing with the matter in hand short of referral back to the GBEB

3.5. If having scrutinised the decision, the GBEB call-in panel feels that the decision was seriously flawed, it may refer it back to the GBEB for reconsideration, setting out in writing the nature of its concerns.

3.6. Implementation of any decision referred back to the GBEB remains suspended until the GBEB has met to reconsider the matter. However, should the GBEB call-in panel choose not to refer the matter back to the GBEB for reconsideration then implementation may begin immediately following the call-in committee meeting.

3.7. The GBEB shall reconsider any matter referred back to it by the GBEB call-in panel either at its next scheduled meeting or at a special meeting called for the purpose. Having considered the concerns expressed by the GBEB call-in panel the GBEB is free to make any decision it chooses *including re-affirming its original decision*.

4. Call-in and urgency

- 4.1. The call-in procedure set out above shall not apply where the decision being taken is urgent. A decision will be urgent if any delay likely to be caused by the call-in process would seriously prejudice the interests of the GBEB or the general public across the 'Greater Brighton' region. The record of the decision, and notice by which it is made public, shall state if in the opinion of the GBEB the decision is an urgent one and therefore not subject to call-in. This is subject to the agreement of the Chief Executive of the lead authority.
- 4.2. Any decision exempted from call-in for reasons of urgency shall be communicated to the Chair of the GBEB call-in panel by the Chief Executive of the lead authority, together with an explanation as to why the decision has been deemed urgent. The intention is that urgency exceptions are used sparingly and only where there is an overriding reason to do so.

Greater Brighton Economic Board					
Summary of Greater Brighton Economic Board Programme 2019/20 to 2023/24					
	2019/20	2020/21	2021/22	2022/23	2023/24
	£	£	£	£	£
Running Costs					
Employee costs	105,080	107,100	109,200	111,300	113,500
Finance support	7,346	7,400	7,500	7,600	7,700
Legal support	10,063	10,200	10,400	10,600	10,800
Communications support	24,950	25,400	25,900	26,400	26,900
Democratic Services support	4,288	4,300	4,300	4,300	4,300
Annual report, printing & materials	5,000	5,100	5,200	5,300	5,400
Scrutiny support	2,000	2,000	2,100	2,100	2,200
Venue hire, hospitality and other	3,000	3,000	3,100	3,100	3,200
Travel costs	1,500	1,500	1,600	1,600	1,700
Work Plan					
Other Work Plans (to be identified)	34,976	32,936	30,300	30,900	31,100
Transport Infrastructure	-				
Digital Infrastructure	-				
Water & Energy Plan	-				
Skills & Employment	-				
ESIF Business Support Bid	30,000				
Work Plan Contingency	10,000	10,000	10,000	10,000	10,000
Total Expenditure	238,203	208,936	209,600	213,200	216,800
Funded by:					
Brought Forward balance	58,139	2,836			
Member Contributions	182,900	206,100	209,600	213,200	216,800
Government Grants	-				
Other Income	-				
Carry Forward balance	-	2,836			
Total Funding	238,203	208,936	209,600	213,200	216,800
<i>Future years running costs assume 2% inflation rise to the nearest £100</i>					

Greater Brighton Economic Board					
Greater Brighton Economic Board Programme 2019/20 to 2023/24					
	Profiled Contributions 2019/20	Profiled Contributions 2020/21	Profiled Contributions 2021/22	Profiled Contributions 2022/23	Profiled Contributions 2023/24
	£	£	£	£	£
CONTRIBUTIONS					
Coast to Capital LEP	7,600	7,700	7,800	7,900	8,000
South Downs National Park	7,600	7,700	7,800	7,900	8,000
Unniversity of Sussex	7,600	7,700	7,800	7,900	8,000
University of Brighton	7,600	7,700	7,800	7,900	8,000
Greater Brighton Metropolitan College	7,600	7,700	7,800	7,900	8,000
Gatwick Airport Ltd	7,600	7,700	7,800	7,900	8,000
Adur District Council	12,500	12,700	12,900	13,100	13,300
Arun District Council *	-	20,200	20,600	21,000	21,400
Brighton & Hove City Council	54,400	55,400	56,500	57,600	58,700
Crawley Borough Council	21,500	21,900	22,300	22,700	23,100
Worthing Borough Council	19,500	19,800	20,100	20,500	20,900
Lewes District Council	18,000	18,300	18,600	18,900	19,200
Mid Sussex District Council	11,400	11,600	11,800	12,000	12,200
	182,900	206,100	209,600	213,200	216,800
<i>Future years contributions assume 2% inflation rise to the nearest £100</i>					
<i>* Arund DC contribution for 2019-20 has yet to be confirmed pending date of membership</i>					

Greater Brighton Economic Board 2018-19			
Summary of Greater Brighton Economic Board Programme 2018/19			
	Budget £	Actual £	Underspend / (Overspend) £
Running Costs			
Employee costs	103,020	97,290	5,730
Finance support	7,202	7,202	0
Legal support	9,865	9,865	0
Communications support	10,500	24,950	(14,450)
Democratic Services support	4,203	4,203	0
Annual report, printing & materials	5,000	5,483	(483)
Scrutiny support	2,000	-	2,000
Venue hire, hospitality and other	3,000	3,230	(230)
Travel costs	1,500	-	1,500
Work Plan			
Work Plan Items	120,000	70,879	49,121
Work Plan Contingency	34,271	19,320	14,951
Total Expenditure	300,561	242,422	58,139
Forecast underspend of £58,139 will be carried forward to 2019-20			

Greater Brighton Economic Board 2018-19	
Greater Brighton Economic Board Contributions 2018/19	
	Profiled Contributions 2018/19 £
CONTRIBUTIONS	
Coast to Capital LEP	7,500
South Downs National Park	7,500
University of Sussex	7,500
University of Brighton	7,500
Greater Brighton Metropolitan College	7,500
Gatwick Airport Ltd	7,500
Adur District Council	12,345
Brighton & Hove City Council	53,406
Crawley Borough Council	21,130
Worthing Borough Council	19,215
Lewes District Council	17,734
Mid Sussex District Council	11,234
Total Contributions 2018-19	180,064
Brought Forward Balance 2017-18	120,497
Total Funding Available 2018-19	300,561

Subject:	Greater Brighton Business Survey – Stage 1 Report		
Date of Meeting:	26 March 2019		
Report of:	Chair, Greater Brighton Officer Programme Board		
Contact Officer:	Name:	Nick Hibberd	Tel: 01273 293020
	Email:	Nick.Hibberd@brighton-hove.gov.uk	
Ward(s) affected:	All		

FOR GENERAL RELEASE**1. PURPOSE OF REPORT AND POLICY CONTEXT**

- 1.1 On 17 April 2018, the Greater Brighton Economic Board “the Board” approved the Operational Arrangements for 2018/19. Within the budget the Board committed £50,000 to supporting an inward investment and trade offer to business, and officers on the Greater Brighton Officer Programme Board (GBOPB) were tasked with developing a project or projects where this can add value to the inward investment and trade proposition.
- 2 The activity that was considered to have most value in supporting the proposition was to conduct a city region business survey. Greater Brighton has not yet approached businesses directly to determine their business needs opportunities and challenges. This report updates the Board on the progress of the survey and outlines the next steps

2. RECOMMENDATIONS:

- 2.1 That the Board notes the contents of the report
- 2.2 That the Board agrees to proceed to stage 2 of the project which is the main business survey.
- 2.3 That the Board promotes business engagement in the survey.

3. CONTEXT/ BACKGROUND INFORMATION

- 3.1 On the 25 April 2017 the Board approved the recommended work plan for 2017/18. A key work stream for 2017/18 was the development of a Greater Brighton Inward Investment & Export Strategy
- 3.2 Regeneris were appointed as the consultancy that would develop the strategy, and on 17 April 2018 the Inward Investment & Export Strategy was presented to the Board for approval.
- 3.3 Regeneris made two key recommendations for the Board’s consideration;

- i. Creation of a new Trade and Investment Team, subject to funding being identified, focusing on attracting new investment to Greater Brighton, and on supporting City Region Businesses to grow and trade internationally
 - ii. Delivery of a physical and high-profile hub for Greater Brighton trade and inward investment activities, with potential 'satellite' hubs across the City Region.
- 3.3 Based on case studies of other city region Investment & Trade Teams (Invest Manchester, Thames Valley UK, Invest Bristol & Bath), and adjusted for population size, Regeneris suggested that a team of 6 FTE was required to deliver a similar level of service and set of outcomes for Greater Brighton. Clearly there is a significant resourcing and cost requirement to establish a team of 6 staff – indicative costs would be circa £2m over five years which would include staffing costs and out-of-pocket costs for marketing, running events, hosting delegations and visitors etc.
- 3.4 At the April 2018 meeting, the Board approved the suggested next step, which was for officers to commence work on preparing a detailed working proposal around how to take forward the two key recommendations above. Part of that was to look at funding the Inward Investment & Trade Team, and at that time there were several possible funding opportunities worth exploring. One of these was to the Coastal Communities Fund (CCF) and a bid was submitted in the spring of 2018. The CCF call was oversubscribed, receiving 285 bids worth £246 million against an available budget of £40 million. The Inward Investment & Trade team proposal was not successful so options around funding the team are still being explored.
- 3.5 There was acknowledgement from the Board that for investment and trade activity to have maximum benefit there needed to be a thorough understanding of the business base. However, at that time there was very limited availability of primary research data to draw upon. The Board had been operating for around four years, and business representatives on the Board play an important role in reflecting the needs and concerns of business to inform the Board's priorities. But the Board had not gone directly to the wider business community to gather primary feedback on the issues, challenges and opportunities facing businesses across the City Region. It's this kind of intelligence that would really help shape the offer of invest and trade activity and ensure that any resource established to perform this work delivers the most relevant support to current and future businesses operating in the City Region.
- 3.6 The timing of conducting a business survey seemed sensible as the local and national context is going through a period of rapid change; In November 2017 Government published its Industrial Strategy White paper; "Building a Britain fit for the future" which followed the Green Paper earlier in the year. The White Paper sets out the Government's plan to "create an economy that boosts productivity and earning power throughout the UK." There is an understanding from Government that there needs to be a place-based approach to deliver the Industrial Strategy successfully. Work will commence imminently on developing a Local Industrial Strategy for the Coast-to-Capital region, and this work will

reflect Gatwick 360o, Coast-to-Capital's new Strategic Economic Plan (SEP) for 2018-30, that was published in July 2018.

3.7 In addition, the ongoing uncertainty around the UK's upcoming departure from the European Union will be a challenge for some businesses trading with the EU, whether that is exporting goods or services or importing raw materials and other inputs. The Business Survey will look to draw out what challenges and opportunities business are encountering with regards Brexit, and what support they may need to maximise opportunities and respond to challenges.

3.8 The key objective of a Business Survey will be to gather primary data that can be used in the following ways;

- To identify and work with those already trading overseas and support them in trading more widely
- To identify businesses who may be interested in export but have no experience
- To provide a potential pipeline of businesses for the business support programmes e.g. access to the business grant scheme, leadership & management, monetisation of innovation
- It will inform development of projects associated with the Board's Five Year Strategic Priorities (e.g. what common issues emerge from the research that the board could seek to address?)
- To identify businesses who are potentially at risk and may need help
- To identify businesses who are doing well and should be celebrated
- To identify levels of business engagement with support services.

3.9 The main benefits resulting from conducting the Business Survey Include;

- A greater understanding of the current challenges and opportunities facing our businesses.
- An understanding of how our businesses are likely to be affected by Brexit, and what mitigations can be put in place
- Improved understanding of our key export markets
- The information will allow us to develop the most effective support and interventions to assist our businesses
- It will provide invaluable primary data when preparing bids or making a case to government for investment e.g. in framing some of the asks around a Local Industrial Strategy
- It will ensure that any dedicated resource allocated to inward investment and trade, will be able to get up and operating more quickly and effectively.

3.10 In October 2018, a sub-group from the GBOPB was established to act as the steering group for the Business Survey project, and initial tasks included agreeing the scope of the project, signing off of the project mandate and preparing the invitation to tender (ITT) documents. The ITT documents were published in early November and following a shortlisting and interview process, BMG Research in partnership with the Institute of Employment Studies (IES) were awarded the contract. The project effectively went live following an inception meeting on 10 December 2018.

3.11 The project has been split into two stages:

Stage 1 – Desk Research

IES will undertake a desk top exercise to review available data and information held by GBEB Board members.

As part of this stage there would also be a number of direct interviews with GBEB partners and key City Region stakeholders to understand the current business support offering, gather their reflections on some of the challenges and opportunities facing businesses

The information gathered will form a report which will be presented to the Board and will also be used to help inform the questionnaire design.

Stage 2 – Business Survey

BMG Research will carry out a business survey that will gain responses from at least 1,500 City Region businesses. The sample will be a representative sampling of the total Greater Brighton business population, in terms of business size, sector and geography.

Stage 1 of the project started soon after project inception and the report at the appendix draws together the main themes and findings from this phase. Stage 2, the main Business Survey, will start shortly and is due to complete towards the end of May. The final report will be presented to the Board at the meeting on 16 July.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

The first option for taking forward the Inward Investment and Trade Team recommendations are to seek a suitable resource with which to fund it. Currently there are no live funding calls that can be applied to, however as this a key priority within the GBEB 5 year plan a proposal will come forward to the July Board meeting seeking funds for a new dedicated post and part-time support officer to help kick start the work.

5. COMMUNITY ENGAGEMENT & CONSULTATION

5.1 A number of GBEB Partners and wider City Region stakeholders have been able to provide input into Stage 1 of the project. IES conducted 19 stakeholder interviews, some face-to-face and some via telephone, and the list of organisations that have contributed can be seen on page 52 of the appended report.

This business survey represents the first business consultation exercise undertaken by the Greater Brighton Economic Board. The sampling size will ensure that there is representative sampling by business size and location. BMG research has a strong track record in conducting surveys of this type on behalf of central and local government. They have been tasked with ensuring that the sampling models agreed are put into effect by the research team.

6. CONCLUSION

- 6.1 The Board is asked to note the contents of the Stage 1 report and the next steps for the business survey.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 Funding of up to £50,000 has been set aside from the 2018-19 Greater Brighton Economic Board operating budget to support the inward investment support to business and in particular the Greater Brighton Inward Investment and Trade Strategy. The funding has supported the delivery of the stage 1 desk research task which has been completed and the stage 2 business survey which will start shortly. Any unused funding will be carried forward into 2019/20 to support the completion of the survey which is due to be finalised in May 2019.

Finance Officer Consulted: Rob Allen, Principal Accountant

Date: 11/03/19

Legal Implications:

- 7.2 This project was commissioned in line with Brighton & Hove City Council (BHCC) procurement procedures and will be delivered under contract using BHCC Standing Orders.

Lawyer Consulted: Joanne Dougnaglo

Date: 11/03/19

Equalities Implications:

- 7.3 None.

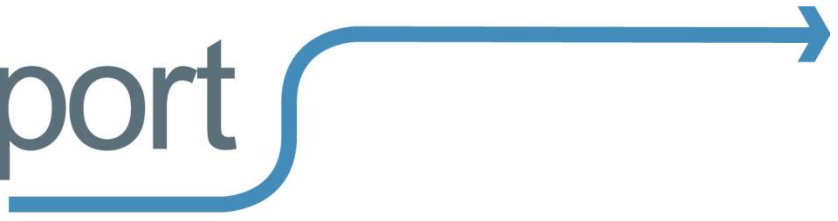
Sustainability Implications

- 7.4 The survey will be conducted over the telephone using trained staff who will record information online thereby negating the need for paper questionnaires and subsequent waste.

SUPPORTING DOCUMENTATION

Appendices:

1. Greater Brighton Business Survey Stage 1 Report



Greater Brighton Business Survey

Stage One Report – Draft

Matthew Williams, Tony Wilson, Clare Huxley, James Cockett



Institute for Employment Studies

IES is an independent, apolitical, international centre of research and consultancy in public employment policy and HR management. It works closely with employers in all sectors, government departments, agencies, professional bodies and associations. IES is a focus of knowledge and practical experience in employment and training policy, the operation of labour markets, and HR planning and development. IES is a not-for-profit organisation.

Acknowledgements

The authors are indebted to the individuals within the stakeholder organisations who spared their time to assist with the research, and to the project steering group.

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IES project code: 00317-5578

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Executive summary

This report presents the findings from Stage One of the Greater Brighton Business Survey, which gathered information from existing reports, local stakeholders, and national business and employment data sources to provide a baseline of information prior to the survey, and views on questions and topic areas that could usefully be covered in the survey to fill gaps in knowledge and understanding.

The key findings are presented here under the five key themes in the Greater Brighton Economic Board strategy.

Summary of key opportunities and challenges for Greater Brighton businesses, and question ideas for the business survey

Themes	International	Creative	Connected	Talented	Resilient
Opportunities 	Home to international businesses/exporters in: - Life sciences - Advanced manufacturing - Financial services	Creative sectors over-represented, particularly in B&H Businesses are innovative (survey data and exemplars eg B&W Speakers)	International airport and ports Digital connectivity via superfast broadband in most of area – plans to upgrade on coast/B. Hill	Two universities Colleges and specialist trainers Well-educated workforce	Strong business survival rates Key sectors have out-performed national growth rates
Challenges 	Lack of understanding of exporting businesses, particularly service businesses Leadership/ management skills barrier to exporting	Supporting creative or innovative business as they seek to grow – business support and lack of commercial space	Poor E-W road links in Adur/Worthing N-S rail has reliability issues Transport improvements vs environment	Staff shortages in Crawley Transport difficulties hinder movement of labour Businesses’ engagement with Apprenticeships, and awareness of T Levels	Lack of commercial space hinders growth opportunities Freehold space a particular shortage
Survey ideas 	Qs on: - exporting activity - barriers to exporting	Qs on: - support that has assisted innovation - views on ‘creative’ economy	Qs on: - transport as a barrier to growth - need for ‘ultrafast’ broadband	Qs on: - recruitment difficulties - skills shortages - business engagement with education/training	Qs on: - lack of commercial space as barrier to growth - risks (+ opportunities?) from EU departure
	Most concentrated	Largest		Fastest growing	
Key sectors	Air transport More than 7x as large as in Great Britain Employs 16,000 workers Relatively poor recent employment change	Visitor economy 35,000 workers Not over-represented (Location Quotient of 1.0) Relatively poor recent employment change		Electrical/electronic manufacturing Employment has doubled in last 6 years Small – 1,200 workers LQ of 2 – twice as large as in Greater Britain	

International

The Greater Brighton economic area is home to a number of businesses that have a large international presence in their sector. Life sciences is well represented by exporters such as GlaxoSmithKline, Elekta and Varian, and advanced manufacturing covers exporters like Thales, Electronic Temperature Instruments (ETI) and Eurotherm. Other smaller businesses operating in international markets had the potential to export, or export more, for example Rayner Intraocular Lenses. However, an understanding of exporting activity among service sector businesses was identified as key gap in local knowledge.

Stakeholders felt that if businesses had the desire to export, and were operating in markets where exporting was possible, then there was support available to assist them in selling their goods or services overseas. Lack of leadership and management skills was seen as a major barrier to exporting.

Although stakeholders were aware that large international or multi-national firms were exporting, there was a gap in understanding the totality of export activity occurring among firms within their areas. The survey can be used to fill that gap by asking about exporting activity and about supply chain links – SMEs may not think they are exporting but may be supplying larger firms that are selling finished products overseas. Understanding the barriers to exporting can also be investigated in the survey.

Creative

Creative sectors are felt to be important in Greater Brighton, and particularly in Brighton and Hove, but they do not appear as a standard grouping within industrial classifications and so are not part of the formal sector analysis – some activity appears within the ICT sector eg games development, while the visitor economy encompasses artistic creation and theatre. Although dominated by small businesses, the creative sector does have a strong voice, and is well suited to small commercial spaces that are in relative abundance across the area, and so offers potential for development.

Creativity is also expressed through innovation, and many businesses across a range of sectors are highly innovative in their fields – for example life sciences in developing new treatments or equipment, and manufacturers such as B&W Speakers. The 2014 business survey of Greater Brighton (excluding Crawley and Mid Sussex) found that two thirds of businesses in Greater Brighton could be considered ‘innovation active’ in that they have recently introduced or are preparing to introduce new products, services or processes, higher than the national proportion.

The business survey can be used to better understand how innovation can be supported, through local business networks and sharing, or through business support services, and which organisations successful innovators identify as the key support services.

The survey can also provide insights into how to foster the wider creative economy across all relevant sectors/occupations.

Connected

The sub-region is well connected internationally with Gatwick Airport and the ports of Shoreham and Newhaven, although transport within the area has some issues – poor east-west road links, particularly in Adur and Worthing; reliability issues with north-south rail links from Brighton; some towns (eg Newhaven, Seaford) that are more remote from the trunk road network.

The survey can explore the extent to which transport problems are a barrier to growth, to investment, to recruitment, and the extent to which businesses have considered relocation because of transport difficulties. Views on the trade-offs between improved transport versus attractiveness and quality of life may also be worth investigating.

Another key connectivity issue is digital connectivity, particularly as digital sectors are a key part of the economy of some districts. There are plans for improving connectivity, for example along coastal West Sussex and in Burgess Hill, and developments such as 5G offer opportunities for new ways of working. Business views on digital connectivity may be gathered through the survey and help inform local stakeholders, among whom there were sometimes mixed views as to whether ‘ultrafast’ broadband was necessary over ‘superfast’.

Talented

Businesses require the right skills to develop and grow, and the sub-region contains a large number of education and training providers including FE and Sixth Form colleges, two universities, and specialist providers operating in key sectors such as flight schools. The workforce is generally highly educated, with a high proportion of graduates.

However, in some parts of the sub-region business find it difficult to recruit any staff, let alone staff with the right skills. Crawley, and to a less extent Mid Sussex, have more job opportunities than available labour, which causes difficulties recruiting at any level, although it is more acute at the higher occupational levels. It was felt that recruitment difficulties need to be investigated in the survey as much as skills shortages, with questions on whether businesses are experiencing them, and if so the reason and their impact, and any mitigating activities such as targeting specific segments of the labour force, such as older workers.

Interaction with the education and training system by businesses is another key issue that the survey could explore, to understand if both parties are on the same page in terms of what is meant by work readiness and employability, and to understand the level of engagement with apprenticeships (whether Levy payers use all their fund or transfer it to their supply chain) and understanding of T Levels.

The potential impact on labour supply of the UK’s departure from the European Union is another key concern among businesses, particular those in sectors that rely more heavily on migrant labour.

Resilient

Greater Brighton businesses exhibit resilience by having above average survival rates in comparison with national averages, although within the sub-region businesses in Crawley generally have lower rate of survival than those in other districts.

A number of key sectors have also exhibited resilience by outperforming the sector nationally – the life sciences sectors have grown in employment terms in the last six years whereas nationally employment has decreased, while employment growth in advanced manufacturing sectors and in insurance and financial services has been faster than the national rate of increase.

However, commercial space is often a barrier to businesses expanding and growing; suitable sized space, and freehold space, were felt to be in relatively short supply. Questions about businesses' experiences of finding the right premises, and the types and sizes of space they require, can help estate development meet business needs.

In terms of the extent to which constraints on water, energy, housing, transport and digital communications might limit the potential to grow the business base, the survey could usefully ask where businesses see future pressures or opportunities around energy, water and sustainable infrastructure.

In terms of the potential negative impact of the UK's departure from the EU, research by Centre for Cities and the Centre for Economic Performance found that Crawley was likely to be the least affected of 59 towns and cities analysed, with the lowest negative impact on gross value added under either hard or soft Brexit assumptions, although Worthing and Brighton were likely to experience much greater negative impacts. Questions about businesses' views on the key Brexit-related risks, and any potential opportunities, can help the sub-region be more resilient during this major transition period.

1 Introduction

This report presents the results of Stage One of the Greater Brighton Business Survey project.

The aim of Stage One was to undertake a desk top exercise to review available and data held by GB Board members, comprising the six local authorities, the educational institutions, Coast to Capital Local Enterprise Partnership, South Downs National Park, and the business networks

This stage of the project involved a number of information gathering approaches.

1.1 Collection and review of existing reports

The websites of the range of stakeholder organisations were investigated to identify relevant research reports, and particularly those that had gathered views from businesses. In total, over 80 reports were collected and reviewed.

1.2 Interviews with key local stakeholders

A list of key stakeholders was identified in discussion with the project steering group. A mixture of face-to-face and telephone interviews were undertaken using a semi-structured topic guide agreed with the steering group. A total of 19 discussions took place with representatives from 22 organisations, and the list of organisations is presented in the Appendix.

1.3 Collection and analysis of labour market data on key sectors

The third stage involved the collection and analysis of labour market data from national data sources to provide bespoke findings regarding businesses and employment in Greater Brighton, and particularly into the key sectors within the sub-region.

1.4 Report structure

The structure of the report is as follows:

- Chapter 2 presents the key opportunities and challenges for the Greater Brighton City Region that emerged from the discussions with key stakeholders;
- Chapter 3 highlights key question areas that the business survey could focus on to address gaps in local knowledge;

- Chapter 4 presents background information about businesses and employment in the Greater Brighton area;
- Chapter 5 presents information on each of the key sectors, describing their size in terms of establishments and employment in relation to the national average, major employers, and recent trends in employment; and
- The Appendix contains the list of stakeholder organisations that were interviewed, plus raw data tables behind the figures in Chapter 4.

2 Key sectors, opportunities and challenges

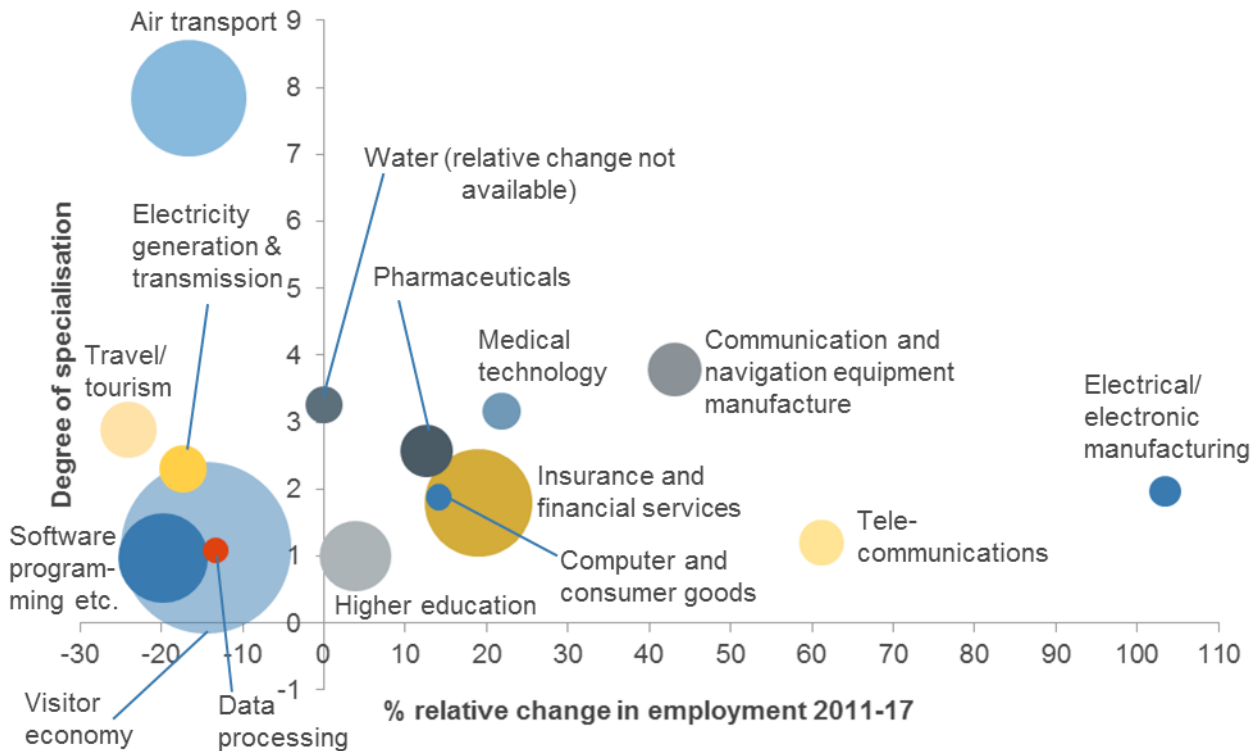
This chapter sets out key opportunities and challenges in supporting both inward investment into Greater Brighton and existing businesses to trade overseas. It draws on interviews with nineteen stakeholders from across the city region and from a desk-based review of previous research, strategies and plans. This chapter also sets out stakeholders' views on the support currently available for trade and investment, and identifies potential priorities that a new inward investment and trade team could focus on.

2.1 Key sectors

Figure 2.1 summarises the key Greater Brighton sectors in terms of their size, the degree of over-representation of employment, and their recent relative employment performance in comparison with the national change in their sector (ie the percentage change in employment in the sector in Greater Brighton between 2011 and 2017 minus the percentage change in the section nationally over the same time). Some key points to note are:

- Air transport is the most over-represented, and is the second largest in employment terms, but the relative performance has been negative;
- The visitor economy is the largest in employment terms, with around 35,000 employees;
- Electrical and electronic manufacturing has experienced the most positive relative change since 2011;
- Higher education, data processing, the visitor economy, and software programming are not particularly over-represented across Greater Brighton as a whole, and the performance of the last three of these sectors has been negative. The visitor economy is the largest in employment terms, while data processing is the smallest (along with computer and consumer good manufacture); and
- Insurance and financial services is relatively large, relatively concentrated and has had a relatively positive performance, while communication and navigation equipment manufacture is smaller but is more concentrated and has performed better.

Figure 2.1: Sector performance in Greater Brighton



Source: IES, ONS BRES data via NOMIS

2.2 Key challenges and opportunities for trade and investment

2.2.1 Challenges

Stakeholder interviews and desk research identified five main challenges for encouraging inward investment and supporting existing businesses to trade. These are taken in turn below.

Commercial space

First, the lack of availability of commercial space, or the right commercial space, was raised as a challenge by a number of interviewees and across the city region. Constraints to the availability of large-scale commercial space, primarily due to the proximity of the South Downs National Park, meant that the city region was not considered to be a viable proposition for large-scale inward investment. Interviewees from Councils and business groups in particular emphasised that their priorities were to ensure that available space is used in the best possible way to support existing businesses to grow.

Within Crawley, there was a “serious” lack of available space, with Manor Royal felt to be full and the proximity to the airport constraining any ability to build. In coastal areas, existing urban development, the sea and the South Downs provided physical and natural barriers to development – with specific concerns also raised that new commercial space was over-subscribed and had often been used for new retail developments rather than sectors with stronger growth and trade potential. In Mid Sussex, the National Park limited the scope for new development. Conversion of commercial space to residential property under permitted development created additional pressure on available space. Within Brighton and Hove specifically, it was raised that a “significant” proportion of commercial (and particularly office) space had been lost to residential use as a consequence of changes made to Permitted Development Rights in 2013. The Council had responded by exempting parts of the city centre and specific redevelopments (such as King Alfred House) from these rules, but nonetheless there was continued pressure to reclassify and redevelop space to meet demand for new housing.

It was felt that there was generally more space available for start-ups (for example shared supported offices such as Basepoint at Haywards Heath, with units from 150-500 square feet), and some space for large employers (for example The Hub in Burgess Hill, the old Amex building in Brighton, and in the longer term the Science Park) but that there was a lack of intermediate space for businesses to grow into after the start-up phase (so around the 1,000-2,000 square foot level). Where Grade A office space did become available, it tends to be snapped up quickly (with, for example, the Brinell Building in Brighton being fully let before completion).

Making space relevant for business needs, and matching the space to the types of jobs likely to be needed, was also a concern. It was felt that there could be a better understanding of what sectors need space prioritised for them, based either on *risk of relocation* because of space/ growth constraints, or on which have the *highest growth potential*. One suggested mitigation was to priorities sectors that both need less space and have high growth potential – with digital and creative businesses in Brighton being the best example of this.

As noted, concerns were raised about the balance between light industrial space and office or retail space, with some respondents considering that too much space was allocated to retail in particular – so limiting the growth potential of manufacturing businesses. In some developments, there were limits placed on the space being allocated for warehousing to ensure sufficient space is allocated for (potentially) higher gross value added sectors.

Transport

Transport issues were also raised by interviewees across the Greater Brighton area. The poor A27 road links west of Shoreham were seen as a big problem, which had been seen as contributing to specific companies relocating all or part of their operations (with the movement of Body Shop staff from Littlehampton to East Croydon given as an example), and A259 east of Brighton was also raised as an issue. These were also felt to have inhibited growth for other businesses. Both the availability and frequency of rail and bus

links were felt to be a barrier to staff using other forms of transport. One interviewee described this as creating a “120 degree economy”, limited both by the sea and by coastal connectivity.

Beyond the A27 and A259 issues, the reliability and cost of north-south rail links were also raised as issues, with the regular scheduled and unscheduled disruption affecting both the perceptions of Greater Brighton as a place to invest, and the reality of improved connectivity into Gatwick and London. North of the coast, a range of local road transport issues were raised – including congestion/ parking problems for Manor Royal (with 30,000 people working in a one square mile area served by a 1950s road network).

Understanding the impact of transport on businesses’ productivity and ability to attract staff was seen as a priority for the survey, to add weight to development of strategic transport initiatives.

Skills

There was a commonly-expressed view that schools needed to do more to prepare young people for the world of work. For example, those businesses accessing the LEP’s Escalator Programme identified skills as the single biggest challenge that they faced. This was most often framed by interviewees around general work-related or employability skills like time management, team work, communications and so on; but a number of respondents also identified specific occupational issues particularly related to science, technology, engineering and maths (STEM). A range of high potential sectors including life sciences, advanced manufacturing/ engineering, digital/ IT and professional services (such as accountancy and finance) relied on STEM skills. So both opening up young people to the possibilities of working in these areas and challenging gender and occupational segregation were seen as key priorities. However, in some areas away from the spine of the City Region (eg Lewes and Newhaven) it was felt that work was needed to raise aspirations and skill levels.

Linked to this, there was a common concern that vocational routes were often not prioritised by schools or young people, and that changes to apprenticeships (including the introduction of the Levy) had made this more challenging by increasing costs and barriers for businesses.

Looking at the range of provision available across Greater Brighton, one interviewee commented that we are “surrounded by educational excellence” – including the two Universities, very good further education and sixth form colleges, a range of good and outstanding schools, and non-state provision including Lancing College, flight schools, and even the football club. The challenge was more in how to harness this at a time of funding pressures and significant change – so for example while interviewees in Crawley felt that Crawley College was responsive to the engineering/ manufacturing needs of local employers and that the two universities were regularly engaging with local employers for work placements and knowledge transfer, interviewees in Mid Sussex highlighted that the closure of the Central Sussex College campus in Haywards Heath had limited local options (although it was hoped that provision in the town would be up and running again from September 2020).

Given the presence of the two Universities within Greater Brighton (and Chichester on its border), another key concern raised was in both retaining talent within Greater Brighton and ensuring that these (mainly) young people were able to work in good quality, high value-added work.

Finally, inevitably, a number of interviewees raised concerns about the impacts on the availability of skills and talent as a consequence of the decision to leave the European Union. This was flagged as a risk by a number of those who were engaged with businesses in high-growth sectors already trading overseas (where effectively their labour and product markets are already international) but also by those engaging with sectors with less advanced skills requirements – for example the visitor economy in Brighton and Hove. In many cases negative impacts were already being felt, likely as a consequence of currency depreciation and the uncertainty about future rights.

For the survey, it will be important to explore in more depth the nature and extent of skills challenges, and potentially to draw out how far the above pressures may lead to increased competition between firms, and/ or potentially greater investment in developing skills and capabilities (although this is less strictly relevant to the specific trade/ investment focus of the survey).

Capacity and capability

Fourthly, there were mixed views about the managerial capability of businesses. In general it was felt that businesses were well managed, and some had access to technical support to export including export finance. Some respondents considered that the management capacity and capability of businesses were significant barriers to trade and export, although in general this was not an area that respondents had very strong or negative views on. It may therefore be a gap worth exploring in more depth in the phase two survey.

There were stronger views on other issues affecting capacity and capability. Some interviewees raised concerns about business access to the finance needed to grow and to trade – with one asking “*where are the venture capitalists to finance this investment?*” Others emphasised a lack of business-to-business support for exporting and growth – specifically around the sorts of networking and mentoring that may help businesses navigate new markets. Linked to this were concerns around the fragmentation of formal business support provision (discussed further later in this chapter).

A major capacity issue in Crawley, and to a lesser extent in Mid Sussex, was difficulty recruiting staff – more of a labour shortage than a skills shortage issue. Crawley has the highest jobs density of all local authority districts in the South East, with 1.4 jobs per local working age resident in 2017 (Brighton, Mid Sussex and Worthing have around 0.85 jobs per resident, Lewes 0.7 jobs, and Adur 0.6 jobs). One interviewee stated that there was one available jobseeker for every five jobs in Crawley, and one to four in Mid Sussex. Although this shortage was more acute at the higher end of the occupational scale, labour shortages existed at all levels – and it was felt that it was important to separate out general recruitment difficulties from specific skills shortages, as they required different approaches to address.

Infrastructure

Finally, a small number of interviewees raised specific concerns about infrastructure constraints within Greater Brighton. These were generally framed as more future-facing challenges – in terms of how constraints on water, energy, housing, transport and digital communications will continue to limit the potential to grow the business base. In the longer term, Greater Brighton would need to see a transition towards more sustainable approaches to energy and water use in particular, as well as continued investment in improvements to digital connectivity (which was currently a particular concern among rural areas where it was felt to be particularly important for facilitating business and remote-working).

2.2.2 Opportunities

Four main areas of opportunity were identified in discussions with interviewees, which are set out below. These also reflect many of the opportunity areas identified in economic strategies and reviews, including the Brighton and Hove Economic Strategy published last year (although notably, no respondents identified digital public service transformation as a specific opportunity area).

Building on growth sectors

The sector analysis has shown that a number of key sectors in Greater Brighton have been growing rapidly in the last few years and outperforming the growth in those sectors nationally. Employment in the electrical and electronic manufacturing sector in Greater Brighton has doubled in the last six years while nationally it has been flat; employment in telecoms has increased by around 50 per cent locally compared with a fall nationally of 12 per cent; and employment in the communication and navigation equipment manufacturing sector has increased by 44 per cent compared with a one per cent increase nationally. Other key sectors with solid if less spectacular growth include pharmaceuticals, medical technology, and insurance and financial services.

Although there has been growth in employment in the computer software programming and publishing, and data processing and hosting sectors, this has not been as large as it has been across the country as a whole (with increases locally of around 20 per cent in the last six years compared with more than 30 per cent nationally). Creative sectors were felt to be a strength across Greater Brighton, with for example Crawley keen to grow its digital sectors as a midpoint between two strong digital centres in Brighton and Croydon and existing strengths around data processing and hosting). Overall while the number of firms and levels of employment in digital and creative sectors were generally small (and not clearly identified in standard classifications), the sectors were seen as a strong voice which can be used to attract and grow business.

So there are a range of opportunities to support existing companies in key sectors to expand. A further priority identified in interviews was to reduce the risks of business moving outside the city region when they reach a certain size. Thinking about and presenting Greater Brighton as a single economic area would be key to this. For example,

Brighton and Worthing were both seen as good places to start a business but not always to grow a business – so as well as supporting business growth in these places, the city region could also do more to support relocation to places like Newhaven or Burgess Hill (rather than say Reading or Swindon) when a business outgrows its space.

Growing the resident workforce

A number of respondents identified that there were a range of opportunities to increase participation in the labour market, and that this was particularly pressing given the labour and skills shortages identified earlier in the chapter. A number of current good practices were identified, including European Social Fund programmes to support disabled people, parents and other disadvantaged groups; work with prison leavers in Ford (just outside the city region, but with potential applicability to Lewes Prison too); and the trialling of a new “Individual Placement and Support” model for those with problem drug or alcohol use in Brighton and Hove.

It was felt that better co-ordination of, and signposting to, this provision – alongside partnership work with Jobcentre Plus, service providers and schools and colleges – could play an important part in helping to address skills and labour needs.

Reskilling and upskilling the workforce

In addition to having sufficient labour available, businesses also need the right skills to succeed. Focusing on priority sectors and engaging with those employers should enable local partners and colleges/ training providers to ensure that the right skills are available at the right time and in the right places, but again this is critically dependent on local co-ordination as well as responsive funding and delivery.

Inevitably, Apprenticeships were seen as the main means of helping to meet future skills needs. For levy-paying employers, specific opportunities were identified in encouraging the transfer of unspent funds to supply chains, and in bringing together public sector levy-payers to support sector-wide initiatives (for example in finance, accounting, health services care and so on). For non-levy employers, partners could play a key role in helping to promote opportunities and to convene businesses and suppliers.

Retaining more graduates within the sub-region is also a key opportunity. For example, research by Centre for Cities found that only 15 per cent of Crawley residents who went to university studied in Brighton, and only one third of graduates returned to Crawley after their studies (with the pull of London likely to be an influence). Both universities felt that their graduates are keen to stay local, if the work opportunities were there –the careers services can play a key role in encouraging graduates to consider and look for opportunities across the whole Greater Brighton area.

Bringing together research, innovation and growth

The two universities were involved in a range of business engagement activity – including placement opportunities for students, Knowledge Transfer Partnerships that benefit businesses, academics and graduates, and a 1-3 year strategic project part-funded by the

government. Both universities also draw on academic staff that have come from key local employers, including Ricardo and GlaxoSmithKline.

Engagement activity occurred at many levels – including individual academics having links with particular businesses, industry advisory boards or research enterprise directors with a more strategic focus on the links between the curriculum/ research and what businesses priorities were, and the Sussex Innovation Centre providing incubator support for business start-ups. The Knowledge Exchange Framework from 2020 will also encourage more formal measuring of business engagement activities as institution-level performance will be compared.

Notwithstanding this, a range of barriers to converting research support into business support were identified – and some respondents felt that these issues were often glossed over by central government. Nonetheless, there were clear future opportunities identified to further bring together, co-ordinate and support the take-up of research and innovation by businesses.

2.2.3 Wider Brexit impacts

Research into the potential impact of the UK's departure from the European Union on Greater Brighton, or the major centres within it, has been undertaken by the UK Trade Policy Observatory (UKTPO) at the University of Sussex, and by the Centre for Cities. The UKTPO report¹ investigated the likely impact of a No-Deal Brexit on constituencies in Hampshire and Sussex, and estimated that the employment loss in Greater Brighton would be around 10,000 workers/employed residents, representing around 2.5 per cent of the total. Crawley is predicted to be least affected, with losses representing 1.6 per cent of workers and 2.2 per cent of employed residents, while East Worthing and Shoreham, and Brighton Pavilion, are predicted to experience the largest losses among workers (3.1% and 2.9% respectively) and Worthing West and Brighton Kemptown are predicted to experience the largest losses among residents (3.6% and 3.5% respectively). The Centre for Cities/Centre for Economic Performance report² found that Crawley is likely to experience the smallest impact on Gross Value Added (GVA) of 62 major towns and cities investigated, although Worthing is in the top five worst affected, and Brighton is predicted to be relatively badly hit under the Hard Brexit scenario.

Interviewees mentioned a number of significant potential impacts resulting from the UK's departure, in addition to the challenges and opportunities set out above, including:

- **Workforce.** As noted, some local businesses were already reporting struggling with workforce issues related to Brexit, while there were concerns about businesses having to check the legal status of workers after Brexit. These concerns were particular severe

¹ The Brexit Burden: A Constituency Level Analysis For Hampshire And Sussex

<http://blogs.sussex.ac.uk/uktpo/files/2018/11/Briefing-paper-26-F.pdf>

² Brexit, trade and the economic impacts on UK cities <https://www.centreforcities.org/wp-content/uploads/2017/07/17-07-26-Brexit-trade-and-the-economic-impacts-on-UK-cities.pdf>

among sectors that rely more heavily upon migrant labour, such as the visitor economy.

- **Markets and regulation.** Concerns were raised that key local businesses in regulated sectors, for example pharmaceuticals, may lose access to European markets and so in the worst case could be led to move production to inside the EU. Related to this, those providing overseas services could see their UK standards no longer recognised and so have had to seek accreditation through overseas regulators. This could potentially be a “disaster” for the life sciences sector in particular. In agriculture (important in the rural districts and a LEP priority sector) lamb and dairy farming were felt to be particularly vulnerable if current tariffs were removed and markets were opened up so that British farmers were competing with cheaper goods from other countries such as New Zealand.
- **Access to grants,** for example Horizon 2020 and research and development frameworks, will be more difficult and opportunities to collaborate across Europe and get R&D funding will be reduced – although it was felt that these funding streams were generally under-used by businesses currently.
- **General disruption to transport** (including supply chains) and to travel were frequently raised by interviewees. This could be particularly acute around Gatwick and Newhaven, but spillover from disruption across the wider south east was also a significant concern, and it was a particular risk for organisations reliant on ‘*just-in-time*’ supply chains. Congestion on trunk and local roads due to disruption at the ports was also mentioned.

2.3 Business support

2.3.1 The current picture

Interviewees pointed to an often complex picture of business support, with some sectors, needs and parts of the business base well-served while others have far more limited support. This is set out in more detail below.

Business support currently prioritises high-potential, high growth sectors

While existing government-backed support is available for all businesses, specific support programmes are felt to be mainly focused on smaller companies with higher growth potential. For example, the LEP’s new Escalator Programme is aimed at supporting companies to scale up where they have turnover of around £1 million and 20% growth per annum. This Programme is currently being piloted (including one in Brighton and Hove), with support comprising peer-to-peer groups and expert facilitation. LEP “growth champions” also provide access to business support and expertise.

At the other end of the spectrum, it was felt that very large and well established companies generally did not need or seek business support – and often had relationships with the Department for Business and/ or the Department for International Trade already.

There may be a need for targeted engagement to encourage businesses to *stay* (covered in more detail below), but there was no need for support to *trade or grow*.

So in between these two extremes, a number of interviewees raised concerns that changes to central government funding and organisation had meant that support was missing for mid-size companies with the potential to export but who needed help to do so (in terms of capability, understanding and often even creating the appetite and space to do so). A range of examples were given of specific companies who could benefit from this sort of support, but currently were not a priority.

Specific trade support tends to focus on addressing technical requirements

Beyond support targeted at specific types of business, there is a range of support available across the city region through the Sussex Chambers of Commerce. This includes technical support with export certification, delivery of an Export Documentation Service, guidance on export finance and access to support with finance and insurance. Worthing and Adur Council also reported that they were working with the Chambers to signpost businesses to specialist tax and financial support.

Looking ahead, the LEP also identified that they would be allocating up to £2 million for export support in the near future – likely to employ two new staff, focused respectively on Asia and on the Rest of the World.

However, no respondents identified sources of business-to-business support for trade and export specifically – for example in supporting managers to navigate the system; getting the right skills to export; understanding overseas markets; and so on. The Chambers identified peer-to-peer support as a key priority for the future.

Wider business support can be complementary to trade and export

Notwithstanding this, a range of wider business support not specifically focused on trade and export was identified across Greater Brighton. This included the support available through the Sussex Innovation Centre described earlier in this chapter; new facilities to support innovation that would be coming on stream in future (most notably at the Preston Barracks development); networking opportunities through Council and business networks; and private sector-delivered support including MDHUB (providing peer-to-peer learning and support to senior managers). This provision was all seen as being potentially complementary to, and supportive of, an improved trade and investment offer.

Overall, the business support market is fragmented and hard to navigate

Finally, a common concern raised by respondents was that business support beyond the Chambers and LEP was hard to find and hard to navigate. It was felt that improving the co-ordination and navigation of support already available would be just as important as filling gaps in the current offer – by linking up the range of wider business support available in a similar but more targeted way to the online LEP resources.

2.3.2 Priorities for business support

Five broad priorities for future business support were identified, and provide a useful starting point for exploring and testing through the survey:

- **Targeting mid-sized businesses that have the capability but not the expertise to export.** Examples were given of medium sized employers that may not have strong year-on-year growth but would be well capable of exporting with the right support. Many of these companies are well known to councils and business partnerships so could be targeted directly, and are currently not prioritised for existing trade support.
- **Addressing practical barriers to trade and export.** A range of technical support is already available through the Chambers in particular, but relatively less support is available to help companies build the skills needed to export, develop business plans, understand and analyse potential markets, make the right connections and access ‘critical friend’ or peer-to-peer help.
- **Retaining successful companies.** As noted, retaining successful companies was often considered to be just as important as developing new ones. The old SEEDA Investor Development Network was highlighted as a good model to build on – helping larger employers to make the business case to maintain investment, supporting them to develop their supply chains and engage in their local area, and helping them to make the most of locally available support.
- **Co-ordinating and knitting together existing provision.** As set out above, this should include the range of wider business provision available in Greater Brighton, specific technical provision to trade overseas, and targeted provision for growing companies. Beyond this, there are also opportunities to link up with the opportunities set out earlier in this chapter – including around apprenticeships, education and workforce participation.
- **Providing ongoing support.** Finally, a number of respondents noted that the fragmentation and confusion around support was in part a consequence of support tending to be relatively short-term and ring-fenced. Building longer-term and more holistic relationships, based on account management and dialogue rather than one-off support would be highly desirable (although in practice also challenging to achieve).

3 Topic areas for survey

Drawing the findings together, this chapter sets out headline views on the implications of our findings for the business survey planned for phase two. These are framed around the five strategic themes identified by the Greater Brighton Economic Board – for an international, creative, connected, talented and resilient city region.

3.1 International

Questions to understand current exporting behaviour, and current supply chains, plus opportunities for/barriers to exporting:

- What is happening now in terms of exports – who is exporting (particularly in the service sectors), what is the value of those exports and what markets are they exporting to?
- Understanding supply chains – who are businesses supplying and supplied by?
- What are the practical barriers to trade, getting underneath the headline challenges and understanding what is driving these?
- Market gaps. Don't have comprehensive list of service exporters, need to use survey to get to this if we can!

3.2 Creative

Questions to explore the opportunities for and barriers to innovation and the creative economy:

- Supporting innovation – are businesses aware of the support available, how do they innovate now and who are they working with?
- Where are the blockages and how can these be addressed (in particular between ideas and markets)?
- Creative economy – which businesses are in it, how big is it, what are its unique opportunities and challenges?

3.3 Connected

Questions to understand opportunities and barriers to connecting businesses with each other, their workforce and their markets:

- Transport – getting beneath the headlines, how does transport constrain growth, inhibit investment or encourage companies to consider leaving? How do companies value the trade-offs between transport, location, access to skills, quality of life?
- Digital – what are the opportunities of digital transformation, including 5G connectivity; what are the risks; what does Greater Brighton need to do to maintain advantage?
- Networks and sharing – how do businesses collaborate, which services and networks do they use, what has worked before and what more do they need?

3.4 Talented

Questions on getting the right skills in the right places at the right times:

- Beneath the headlines, what is driving skills shortages and how are these being felt? At what levels, in what areas, over what time?
- What solutions are businesses investing in or considering – particularly around developing their workforce, engaging with education and skills, recruiting in different ways?
- What specifically do employers need from the education system – what are the work readiness, employability and workplace skills?
- How could businesses be better supported to invest in training and development – through the Levy (including supply chains) and/ or in other ways?
- Are recruitment difficulties harming growth, if so how, and are businesses considering moving?
- How do businesses view the opportunities to recruit and develop more people from the resident workforce – including disabled people, older workers and parents?

3.5 Resilient

Questions relating to infrastructure, space and contingency planning:

- What are businesses' experiences of finding the right premises – where is it, can you afford it, and what are the issues/ challenges?
- What types and sizes of space do businesses need to expand?
- Where do employers see future pressures or opportunities around energy, water and sustainable infrastructure?

- Where are the key Brexit-related risks – to markets, skills, accreditation, etc? Where are there opportunities?

4 Greater Brighton business profile

In this chapter we present information on the business profile of the Greater Brighton City Region in broad terms, looking at number of establishments, business start-up and death rates, average establishment size, and business survival rates.

4.1 Establishments in Greater Brighton

In 2018 there were 41,300 business establishments in Greater Brighton. The broad industrial breakdown (1-digit SIC) is presented in **Error! Reference source not found.**, in comparison with the national profile. The largest sectors in terms of numbers of establishments are:

- Professional, scientific and technical activities (16.9% of all establishments);
- Wholesale and retail trade (16.6%);
- Construction (11.0%); and
- Information and communication (10.1%).

In comparison with the national distribution, there are few substantial over-representations of sectors in Greater Brighton. The largest over-representation is in information and communication, which accounts for 10.1 per cent of Greater Brighton establishments compared with 7.4 per cent nationally, and arts, entertainment and recreation, which accounts for 3.5 per cent locally and 2.7 per cent nationally. There are substantial under-representations in the agriculture, mining, manufacturing, water supply and public administration sectors, as well as in transportation and storage despite Gatwick.

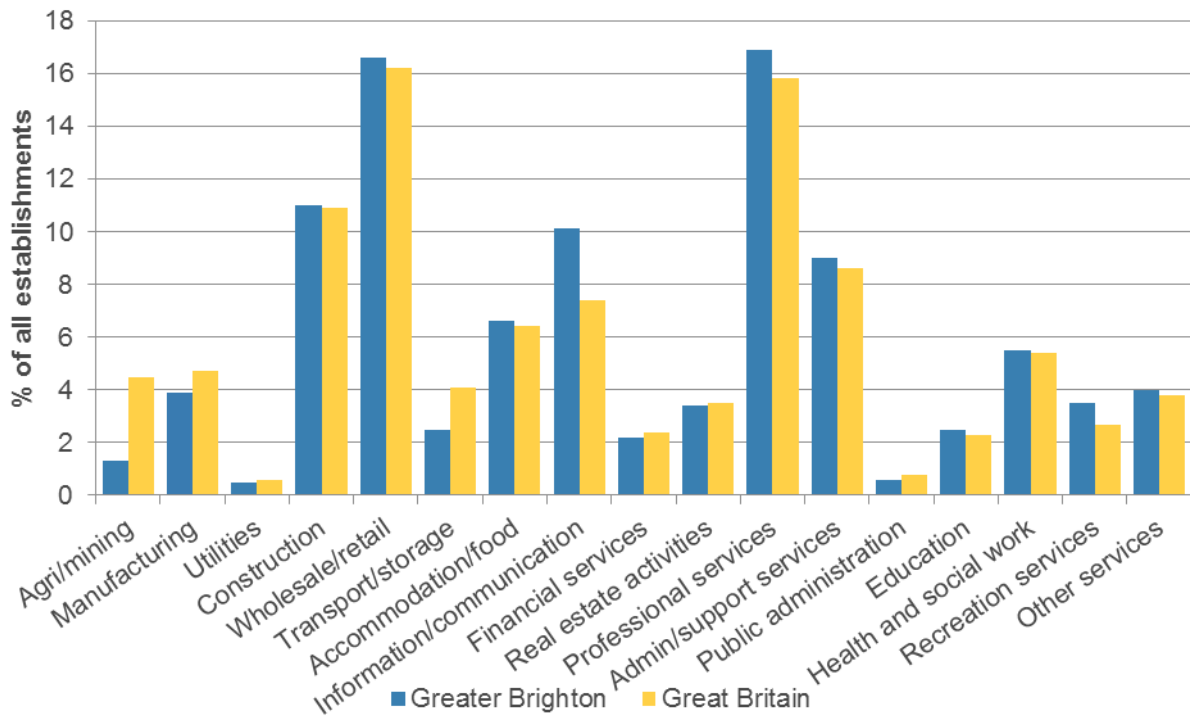
Brighton and Hove accounts for nearly two fifths (39.2%) of all establishments in Greater Brighton, while Mid Sussex accounts for 20 per cent, Crawley, Lewes and Mid Sussex each account for just over 10 per cent, and Adur accounts for seven per cent.

The industrial profile for each district is present in Table 20. Key district specialisms are:

- Manufacturing is over-represented in Adur (6.7% of all establishments), and to a lesser extent in Lewes (5.4%, compared with 4.7% nationally)
- Establishments in the electricity and gas sector account for 1.1 per cent of all establishments in Crawley (0.2% nationally)
- Water supply establishments are over-represented in Adur and Lewes (0.7% and 0.5% respectively, compared with 0.4% nationally)
- Construction is over-represented in Adur (17.5% compared with 10.9% nationally)

- Crawley has twice as many transport and storage establishments as the national average (7.9% compared with 4.1% nationally)

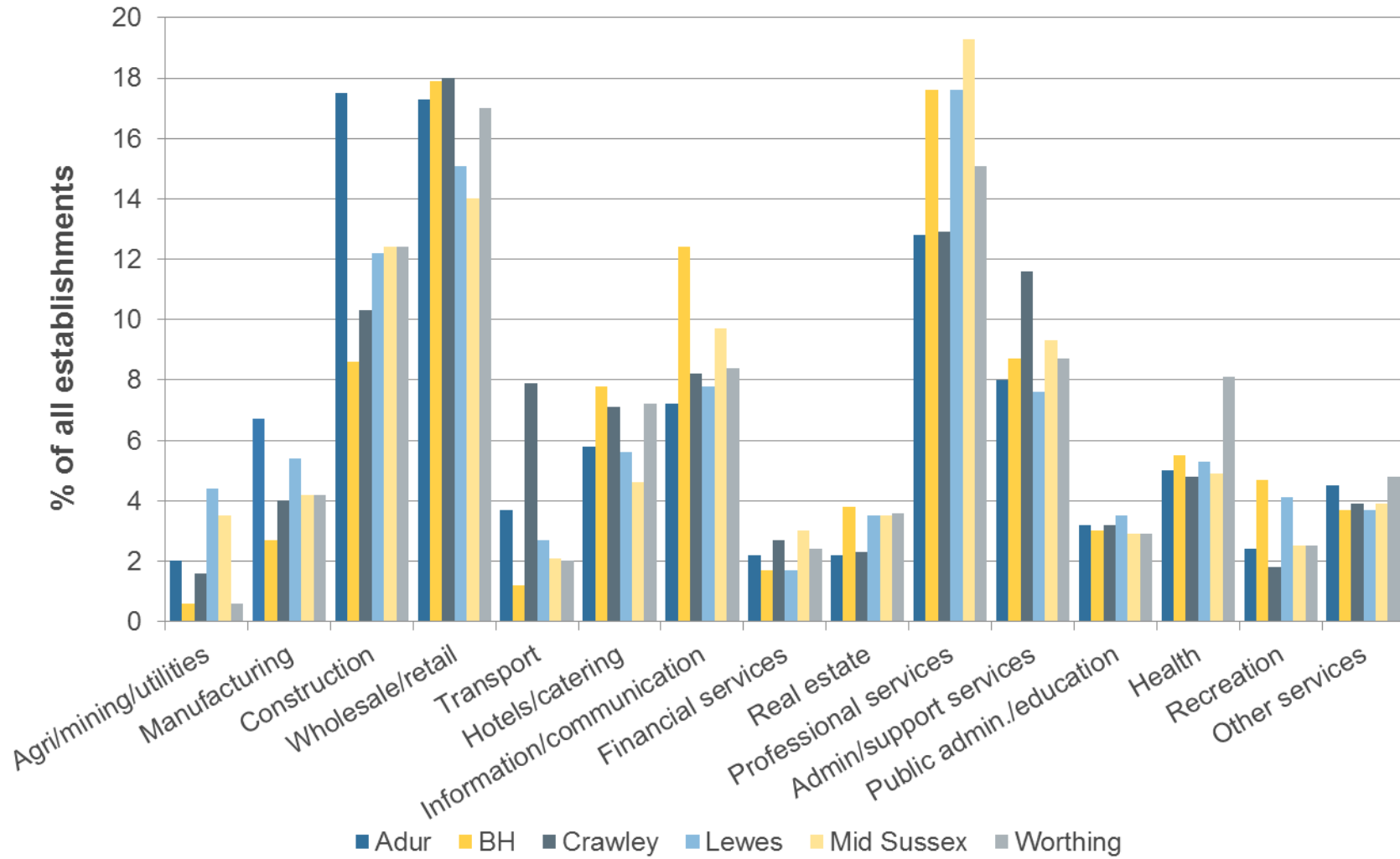
Figure 4.1: Establishments by industrial sector, Greater Brighton, 2018 (%)



Source: ONS Business Count via NOMIS

- Information and communication establishments are over-represented in Brighton and Hove (12.4%) and Mid Sussex (9.7%, compared with 7.4% nationally)
- Mid Sussex has an above average proportion of establishments in professional, scientific and technical activities (19.3% compared with 15.8% nationally)
- Administrative and support service activities are over-represented in Crawley (11.6%, compared with 8.6% nationally)
- Establishments in the arts, entertainment and recreation account for 4.7 per cent of all establishments in Brighton and Hove, and 4.1 per cent of all those in Lewes (2.7% nationally)
- Worthing has over-representations of establishments in health and social care (8.1%, compared with 5.4% nationally) and other service activities (4.8%, compared with 3.8% nationally).

Figure 4.2: Establishments by sector and Greater Brighton district, 2018 (%)



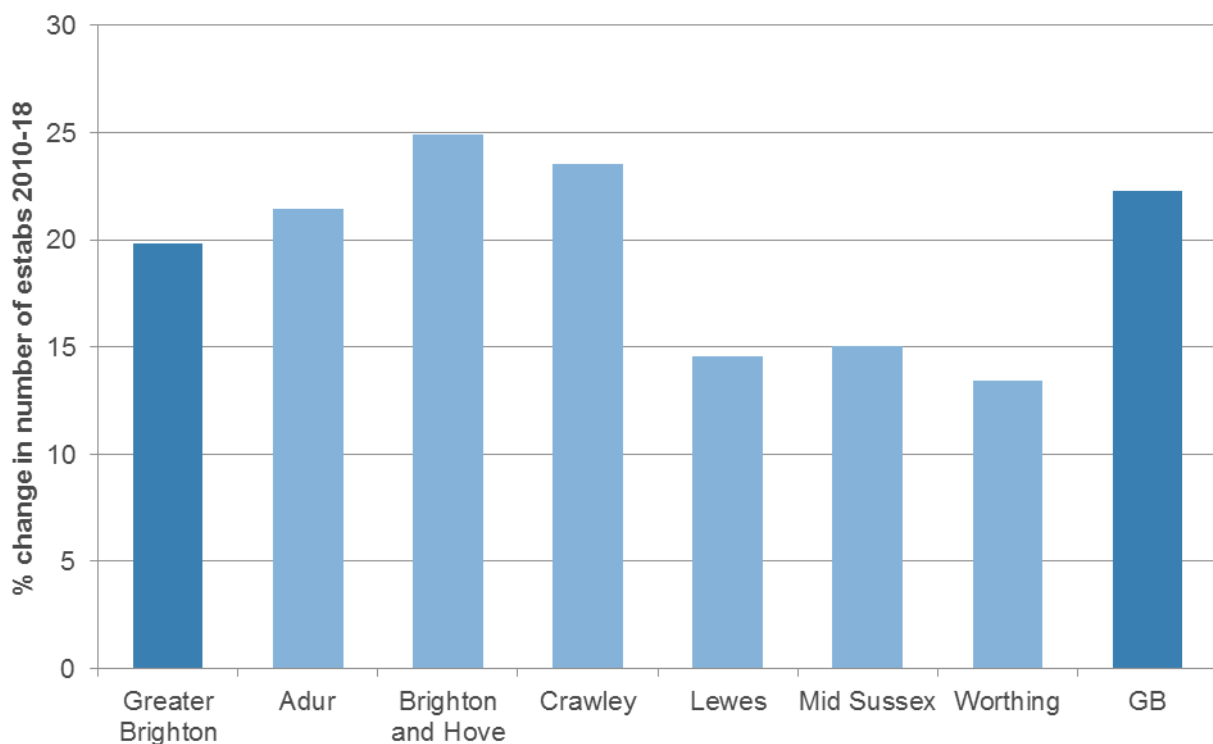
Source: ONS Business Count via NOMIS

4.2 Recent trends in establishments

The number of establishments in Greater Brighton increased from around 34,500 in 2010 to 41,300 in 2018, an increase of 20 per cent. However this is below the national increase in the number of establishments over this period of 22 per cent.

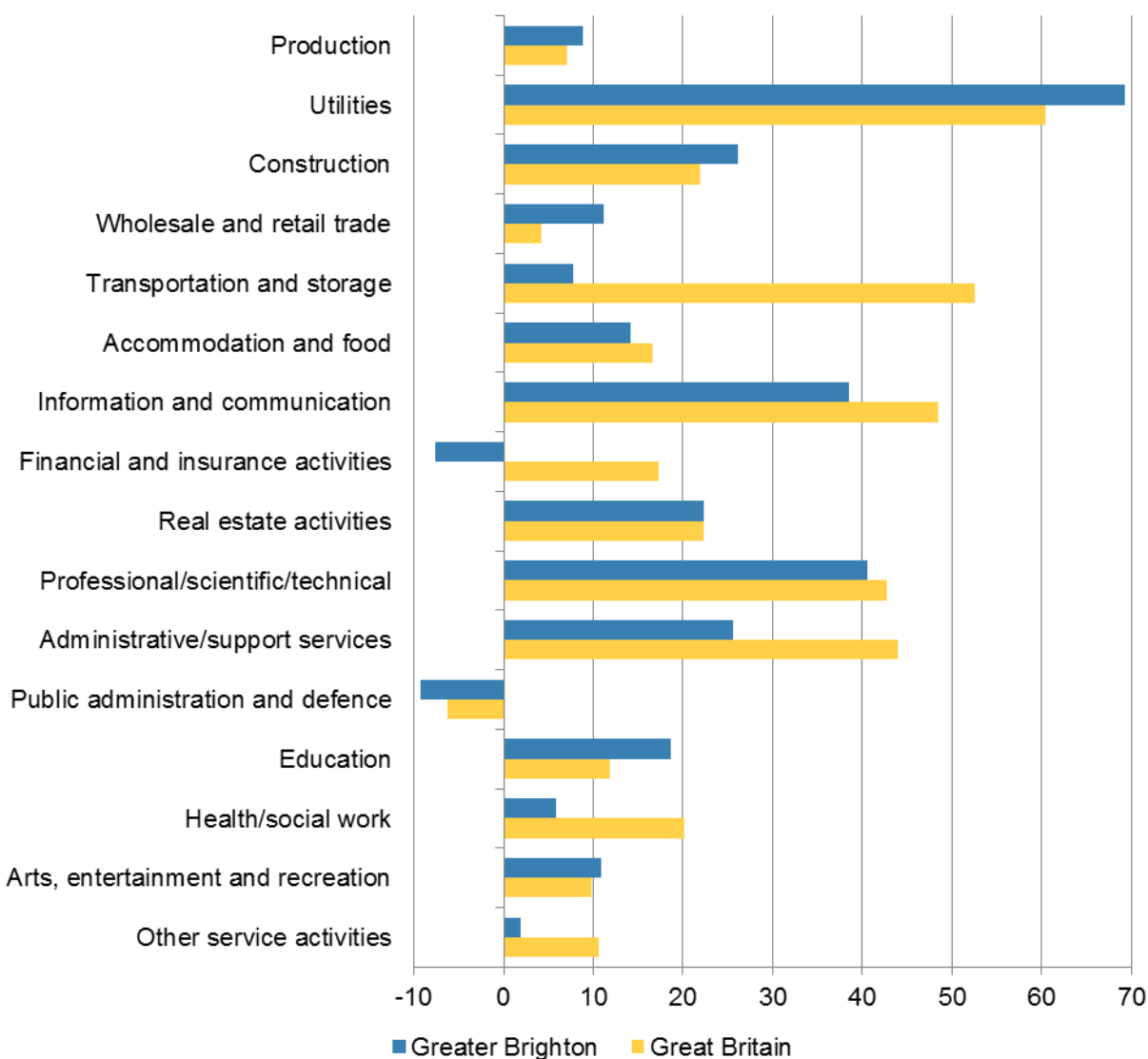
Within the Greater Brighton area, Brighton and Hove experienced the largest increase in the number of establishments, at 25 per cent, followed by Crawley (24%) and Adur (21%), while in the other three districts the increase was less than 15 per cent (Figure 4.3).

Figure 4.3: Increase in number of establishments by local council, 2010-18 (%)



Source: ONS Business Count via NOMIS

Figure 4.4 shows the recent trend in the number of establishments by sector in Greater Brighton, in comparison with Great Britain. In Greater Brighton there have been decreases in the number of establishments in finance and insurance, and in public administration, while nationally the number of establishments in finance and insurance increased by 17 per cent between 2010 and 2018. There were also smaller than average increases in the numbers of establishments in transport and storage, information and communication, administrative and support services, health and social work, and other services.

Figure 4.4: Change in number of establishments by sector, 2010-18 (%)

Source: ONS Business Count via NOMIS

4.3 Average establishment size

The average size of Greater Brighton establishments in the different sectors are shown in Table 1, in comparison with the national average size.

Greater Brighton establishments are larger than average in the utilities sectors (electricity, gas and water), transportation and storage, financial and insurance activities and public administration. This reflects major employers operating in these sectors in Greater Brighton – EDF and Southern Water in utilities, Gatwick Airport and supporting activities in transport, large financial sector companies such as Legal and General and American Express.

However, manufacturing establishments are somewhat smaller than average – 13 employees compared with 17 in the country as a whole – as are establishments in the

information and communication technology sector (3.8 employees compared with 5.7 in Great Britain).

Table 1 Average size of establishments in descending order of size (number of employees)

	Gtr Bton	GB
Public administration and defence	62.4	53.8
Education	35.2	34.7
Electricity, gas	33.9	24.1
Transportation and storage	28.3	11.2
Water supply etc	27.3	18.6
Human health and social work activities	23.6	22.3
Financial and insurance activities	20.1	14.2
Manufacturing	12.8	17.0
Accommodation and food	11.9	11.7
Administrative and support service activities	10.4	10.0
Wholesale and retail trade	9.0	9.1
Arts, entertainment and recreation	7.4	9.2
Other service activities	5.5	5.1
Real estate activities	4.4	4.6
Information and communication	3.8	5.7
Construction	3.5	4.4
Professional, scientific and technical activities	3.4	5.0
Mining and quarrying	2.7	26.5
Agriculture, forestry and fishing	1.8	1.6
All sectors	9.6	9.7

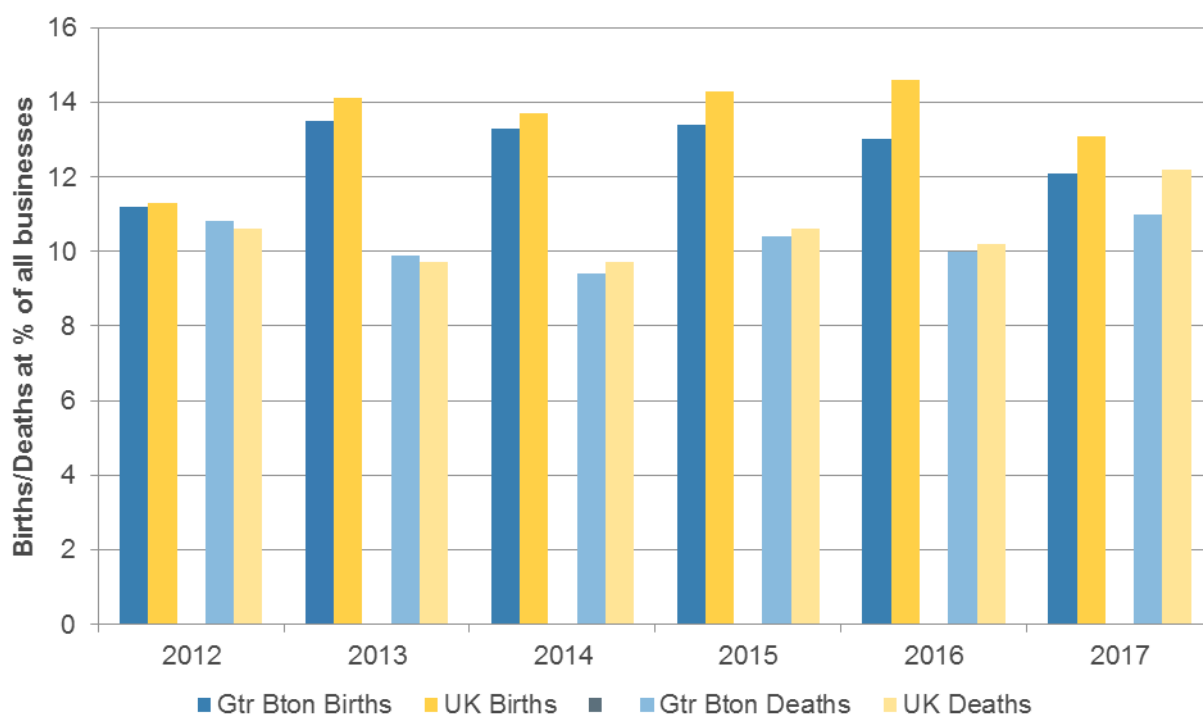
Source: ONS Business Count via NOMIS

4.4 Business birth and death rates

Error! Reference source not found. presents information on the birth and death rates of enterprises in Greater Brighton, from business demography data which cover enterprises rather than establishments.

There is slightly lower ‘dynamism’ in Greater Brighton than in the country as a whole, with slightly lower birth and death rates. The birth rate has been slightly lower than the UK rate for the last six years, with the gap widening somewhat from 2015 onwards, while the death rate was very close to the national rate in 2012 and 2013, before falling below the national rate, with the gap largest in the most recent year.

Looking within Greater Brighton, the birth rate of new enterprises has been highest in Brighton and Hove, and Crawley, with relatively little variation between the other four districts, and the death rate has also tended to be higher in Brighton and Hove and Crawley (see appendix table).

Figure 4.5: Birth rates of new enterprises and death rates of enterprises 2012-17 (%)

Source: ONS Business demography, UK

4.5 Business survival

Although there are relatively fewer business births and deaths in Greater Brighton than in the country as a whole, business survival rates are on average better. Table 2 shows the 1-year, 3-year and 5-year survival rates by the year of business birth for business in Greater Brighton compared with the UK, and shows that survival rates are generally higher in Greater Brighton, particularly the 3-year survival rates.

Table 2 Business survival rates by year of birth, Greater Brighton and UK (%)

	2012	2013	2014	2015	2016
Gtr Bton 1 year	91.6	93.4	92.6	91.1	92.2
UK 1 year	91.3	93.5	92.2	89.7	91.5
Gtr Bton 3 year	61.4	63.8	63.3	-	-
UK 3 year	59.4	60.9	61.2	-	-
Gtr Bton 5 year	45.0	-	-	-	-
UK 5 year	43.2	-	-	-	-

Source: ONS Business demography, UK

Table 3 shows survival rates by district within Greater Brighton, for business births in 2012, 2014 and 2016. Crawley has generally had the lowest survival rates, and although

the patterns have fluctuated somewhat over time, Lewes, Mid Sussex and Worthing have generally had above average survival rates.

Table 3 Business survival rates by year of birth, districts in Greater Brighton (%)

Birth year Survival	2012					2014			2016
	1-year	2-year	3-year	4-year	5-year	1-year	2-year	3-year	1-year
Adur	90.9	75.0	61.4	50.0	43.2	94.4	81.5	68.5	93.4
Brighton & Hove	91.4	74.1	59.9	50.3	43.2	92.4	76.8	61.9	92.5
Crawley	87.5	75.0	57.5	47.5	42.5	90.3	75.3	62.4	89.9
Lewes	93.3	77.3	65.3	57.3	48.0	93.9	77.6	65.3	91.8
Mid Sussex	93.5	79.1	64.0	55.4	48.9	92.8	77.9	63.5	92.1
Worthing	91.7	76.2	63.1	53.6	46.4	92.4	78.1	64.8	93.5
Greater Brighton	91.6	75.7	61.4	52.0	45.0	92.6	77.3	63.3	92.2

Source: ONS Business demography, UK

5 Key sectors in Greater Brighton

Having looked at the overall business and employment picture in Greater Brighton, this chapter looks in detail and the situation for the different key sectors in the sub-region.

As a first step, the priority sectors identified by Coast to Capital Local Enterprise Partnership (LEP) were reviewed to assess the extent to which they over-represented in the Greater Brighton City Region. Secondly, data on the employment size and degree of over-representation of detailed sectors in Greater Brighton were analysed to identify key sectors that are not LEP priority sectors. Table 4 shows the sectors that were identified, along with their 2017 employment level and location quotient figure (the proportion of Greater Brighton employment divided by the proportion of national employment; a figure above 1.0 represents an over-representation of employment locally), plus the districts in Greater Brighton in which the sectors are concentrated.

Table 4 Key sectors in the Greater Brighton City Region

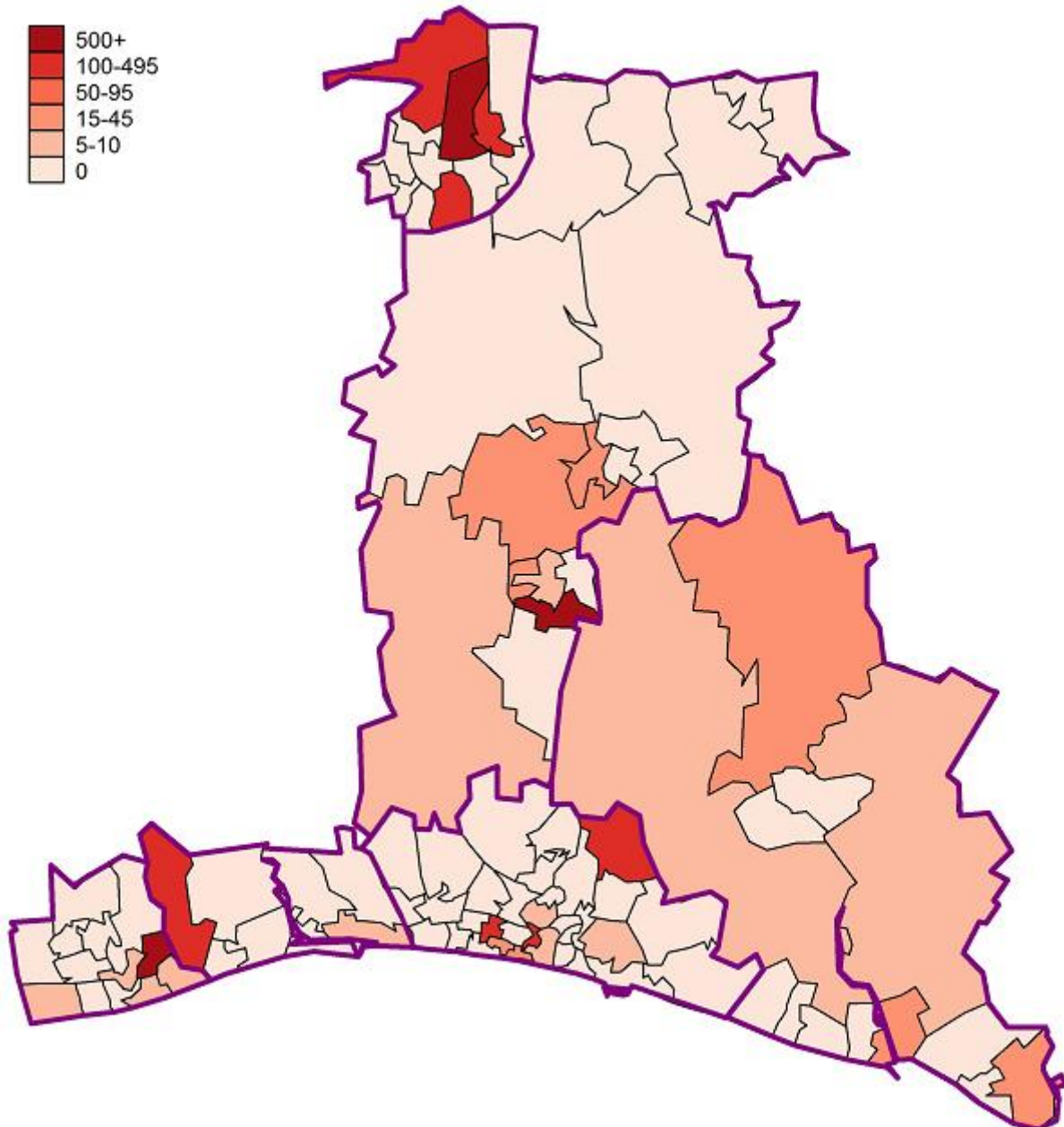
Broad sector	Sector	LEP/ GBEB	Employees	LQ	Key Locations
Life sciences	Pharmaceuticals	LEP	3,300	2.6	C, MS, W
	Medical technology	LEP	1,700	3.2	A, C, W
Advanced Manufacturing	Computer and consumer goods	LEP	850	1.9	W
Manufacturing	Communication and navigation equipment	LEP	3,400	3.8	C
	Electrical and electronic manufacturing	GBEB	1,100	2.0	C, L, MS
Utilities	Electricity generation and transmission	LEP	2,750	2.3	BH, C
	Water supply	GBEB	1,600	3.3	BH, W
	Air transport	LEP	16,000	7.8	C
Information & Communication Technology	Telecommunications	LEP	2,400	1.2	A, BH, C
	Computer software programming/ publishing	LEP	9,600	1.1	BH, C
	Data processing and hosting	LEP	700	1.1	C
	Insurance and financial services	LEP	14,000	1.8	BH, C, MS, W
Visitor Economy	Travel and tourism	GBEB	3,700	2.9	BH, C
Economy	Visitor economy	LEP	35,000	1.1	BH, L
	Higher Education	GBEB	6,000	1.0	BH

Source: IES, ONS BRES data via NOMIS

5.1 Life sciences

There are two key sectors that fall under the life sciences heading – pharmaceuticals, and medical technology. Figure 5.1 shows the distribution of life sciences employment across the Greater Brighton area, and shows concentrations in Crawley, Burgess Hill, Worthing, and some parts of Brighton and Hove.

Figure 5.1: Employment in life sciences sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.1.1 Pharmaceuticals (manufacture and distribution)

Across Greater Brighton the pharmaceutical sector employs around 3,300 employees in 65 establishments. The proportion of employment accounted for by the sector is 2.6 times the national average (0.84% compared with 0.33% in Great Britain).

Table 5 Sector summary for pharmaceuticals sector

Pharmaceuticals	
Sector definition	2120 : Manufacture of pharmaceutical preparations 4646 : Wholesale of pharmaceutical goods
Establishments - Gtr Bton	65
Establishments - GB	3,445
Establishment -LQ	1.4
Employees - Gtr Bton	3,300
Employees - GB	97,000
Employees - LQ	2.6

Source: ONS BRES data via NOMIS

The sector is heavily concentrated in Worthing, with the large GlaxoSmithKline site (c. 900 employees) as well as Allergy Therapeutics (c. 350 employees) in East Worthing; the location quotient for pharmaceuticals in Worthing is 8.3. As a multi-national, GSK have less involvement in local business discussions with the council than a UK-based employer of their size would.

Other major employers include Novo Nordisk (c. 500 employees) in Crawley and Roche Diagnostics (c. 500+ employees) in Burgess Hill, and smaller employers in the sector include Destiny Pharma and Custom Pharma Services in Brighton and Hove, Bard at Tilgate in Crawley, and CSL Behring in Haywards Heath. The LQ for Mid Sussex is 3.9 and for Crawley is 2.9.

Employment in the pharmaceuticals sector in Greater Brighton has increased by nearly 12 per cent from 2011 to 2017, with the number of employees increasing by around 300. Nationally, employment in the sector shrunk by one per cent over this period. Within Greater Brighton, there were employment increases of 25-30 per cent in Brighton and Hove, Mid Sussex and Worthing, although employment fell in Adur from around 150 employees in 2011 to less than ten in 2017.

GlaxoSmithKline is investing £100 million into their Worthing site and this is expected to rise to £200 million over the next three years, which is likely to lead to an increase in employment from the current 900 people on the site.

Cells4Life is a small (c. 30 employees) but growing company in the life sciences sector based in Burgess Hill, involved in stem cell processing, and contributes to the UK's position as one of the leading countries in stem cell research and development. The

company was founded at Kings College in London but moved to Burgess Hill because of space and cost constraints in London, and has a strong international presence.

5.1.2 Medical technology

The med/tech sector in Greater Brighton is smaller than the pharmaceuticals sector, but accounts for a higher relative proportion of employees in comparison with the country as a whole – the 1,700 employees account for 0.44 per cent of total employment, which compares with 0.14 for Great Britain, giving a Location Quotient figure of 3.2. There are around 35 med/tech establishments in Greater Brighton. Within Greater Brighton the sector is concentrated in Crawley, Adur and Worthing, with employment LQs of 8.4, 7.8 and 3.5 respectively.

Table 6 Sector summary for medical technology sector

	Med/tech
Sector definition	2660 : Manufacture of irradiation, electromedical and electrotherapeutic equipment 3250 : Manufacture of medical and dental instruments and supplies
Establishments- Gtr Bton	35
Establishments GB	2,305
Establishment LQ	1.1
Employees - Gtr Bton	1,700
Employees - GB	40,750
Employees - LQ	3.2

Source: ONS BRES data via NOMIS

The two most significant employers are Elekta and Varian on Manor Royal in Crawley, who each employ several hundred workers. Both are world leading companies in the development of advanced cancer treatment systems including linear accelerators, and are significant exporters. Elekta recently rebuilt their UK HQ in a landmark building Manor Royal, on the site of their existing building.

Other employers in the sector include Straumann (dental implants) and Welland Medical (ostomy bags) in Crawley, Eschmann at Lancing Business Park in Adur, who manufacture surgical and decontamination equipment for the medical sector and employ around 200 people, and Rayner Intraocular Lenses in Worthing who design and manufacture lenses and injection devices for use in cataract surgery and also employ around 200 people. Rayner have a national focus but operate in an international market and thus have opportunities for exporting.

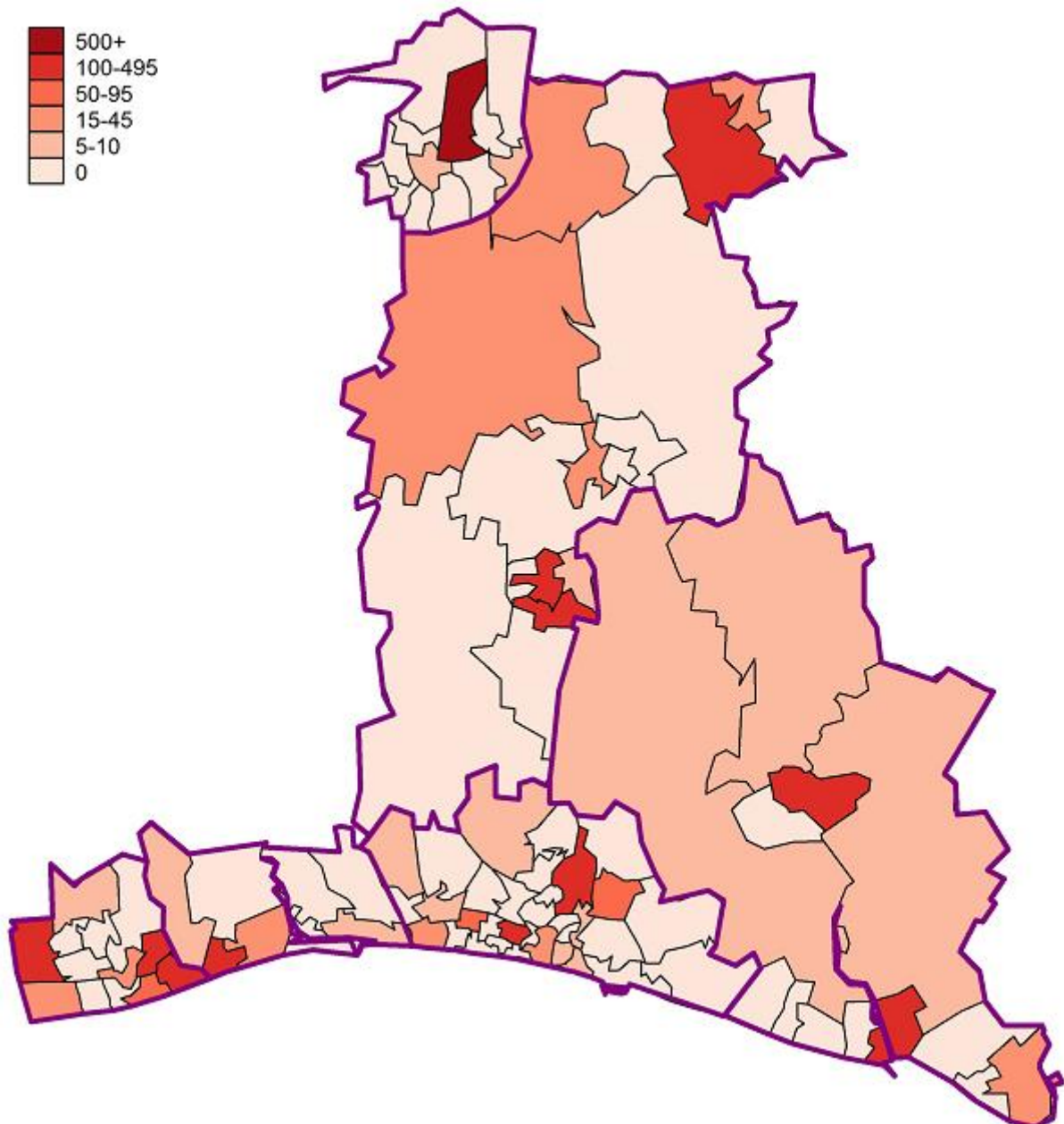
The number of employees in the med/tech sector increased by 17 per cent between 2011 and 2017, from just under 1,500 to around 1,700, while nationally employment decreased by five per cent during this time. Employment in Crawley increased by around 300, a 34 per cent increase, and employment in Worthing increased by around 200, around a five-fold increase on the 2011 figure. However, employment in Brighton fell by around 200.

The Decoy Farm development in Worthing would provide expansion opportunities for Rayner as well as GSK and Allergy Pharmaceuticals.

5.2 Advanced manufacturing

Three key Greater Brighton sectors fall under the advanced manufacturing heading – computer and consumer goods manufacturing, communications and navigation equipment manufacturing, and electrical and electronic manufacturing. The first two sectors are also LEP priority sectors. Figure 5.2 shows the distribution of employment across the Greater Brighton area.

Figure 5.2: Employment in advanced manufacturing sectors by local area, 2017



Source: ONS BRES data via NOMIS

The highest concentration is in Manor Royal in Crawley, while Burgess Hill, Worthing and Adur have relatively strong traditions of advanced manufacturing employment, and there are smaller pockets in east Lewes and Newhaven.

5.2.1 Computer and consumer good manufacturing

There are around 800 workers in the computer and consumer goods manufacturing sector in Greater Brighton, working in around 50 establishments, and in relative terms the sector is nearly twice as large as the national average. Worthing has the highest concentration, with a location quotient of 6.8, while the sector is also over-represented in Adur (LQ of 2.8) and Mid Sussex (LQ of 3.4)

Table 7 Sector summary for computer and consumer goods manufacturing

Computer/consumer goods manufacturing	
Sector definition	2611 : Manufacture of electronic components
	2612 : Manufacture of loaded electronic boards
	2620 : Manufacture of computers and peripheral equipment
	2640 : Manufacture of consumer electronics
Establishments- Gtr Bton	50
Establishments GB	2,325
Establishment LQ	1.6
Employees - Gtr Bton	800
Employees - GB	33,250
Employees - LQ	1.9

Source: ONS BRES data via NOMIS

Bowers and Wilkins in Worthing and Paxton in Brighton are two of the largest employers in this sector. Bowers and Wilkins have been making speakers and headphones in Worthing for over 50 years and employ over 200 people in East Worthing; they are felt to be committed to the area and have potential to grow. Paxton make electronic door entry and building intelligence systems and are based at the Home Farm Business Centre in East Brighton, close to the University of Brighton. They have recently worked with the University of Brighton to develop a scholarship scheme to help overcome skills shortages they were experiencing; in the first year of operation they took three students who worked as interns in the summer and then based their dissertation on a project they undertook with the company, and in the second year the scheme was extended to include the University of Sussex and the firm took on four students.

Employment in the sector in Greater Brighton fell by seven per cent between 2011 and 2017, compared to a national fall of 21 per cent over this period. Employment held up in Brighton and Worthing, with numbers increasing by seven per cent in each district.

5.2.2 Communications and navigation equipment manufacturing

The communications and navigation equipment manufacturing sector is nearly four times as large in Greater Brighton as it is across the country as a whole. The 3,500 employees account for 0.89 per cent of total employment, compared with the national average of 0.24 per cent.

Table 8 Sector summary for communications and navigation equipment manufacturing

Communications and navigation equipment manufacturing	
Sector definition	2630 : Manufacture of communication equipment 2651 : Manufacture of instruments and appliances for measuring, testing and navigation
Establishments- Gtr Bton	55
Establishments GB	3,530
Establishment LQ	1.1
Employees - Gtr Bton	3,500
Employees - GB	69,750
Employees - LQ	3.8

Source: ONS BRES data via NOMIS

Employment is concentrated in Crawley and Worthing, with location quotients of 10.2 and 4.0 respectively. Thales in Crawley is a world leading company in defence aerospace, and employs around 2,000 workers on Manor Royal. Worthing is home to Electronic Temperature Instruments (ETI) and Eurotherm, who employ around 100 and 300 workers respectively. Both are major exporters, and ETI holds three Queen's Awards for Exporting.

Between 2011 and 2017 employment in the sector in Greater Brighton increased by 44 per cent, compared with a national increase of just one per cent. In Worthing, employment nearly trebled, from 160 to 450, and employment in Crawley increased by 52 per cent.

5.2.3 Electrical and electronic manufacturing

Across Greater Brighton around 1,200 employees work in the electric and electronic manufacturing sector, in 35 establishments. The proportion of employment accounted for by the sector is twice the national average (0.30% compared with 0.15% in Great Britain), and there is a very strong over-representation in Lewes district (LQ of 4.9).

Table 9 Sector summary for electric and electronic manufacturing

Electric and electronic manufacturing	
Sector definition	2732 : Manufacture of other electronic and electric wires and cables 2740 : Manufacture of electric lighting equipment 2751 : Manufacture of electric domestic appliances 2790 : Manufacture of other electrical equipment
Establishments- Gtr Bton	35
Establishments GB	1,980
Establishment LQ	1.3
Employees - Gtr Bton	1,200
Employees - GB	45,000
Employees - LQ	2.0

Source: ONS BRES data via NOMIS

Major employers include Time24 in Burgess Hill (wiring and cabling), Hanover Displays in Lewes (digital displays), Feilo Sylvania in Newhaven (lighting), and Fireco in Brighton (fire door systems).

The number of workers in the sector in Greater Brighton has doubled in the last six years, while nationally employment has been flat. Within Greater Brighton there have been large increases in Adur, Crawley and Worthing, but no change in employee numbers in Lewes district.

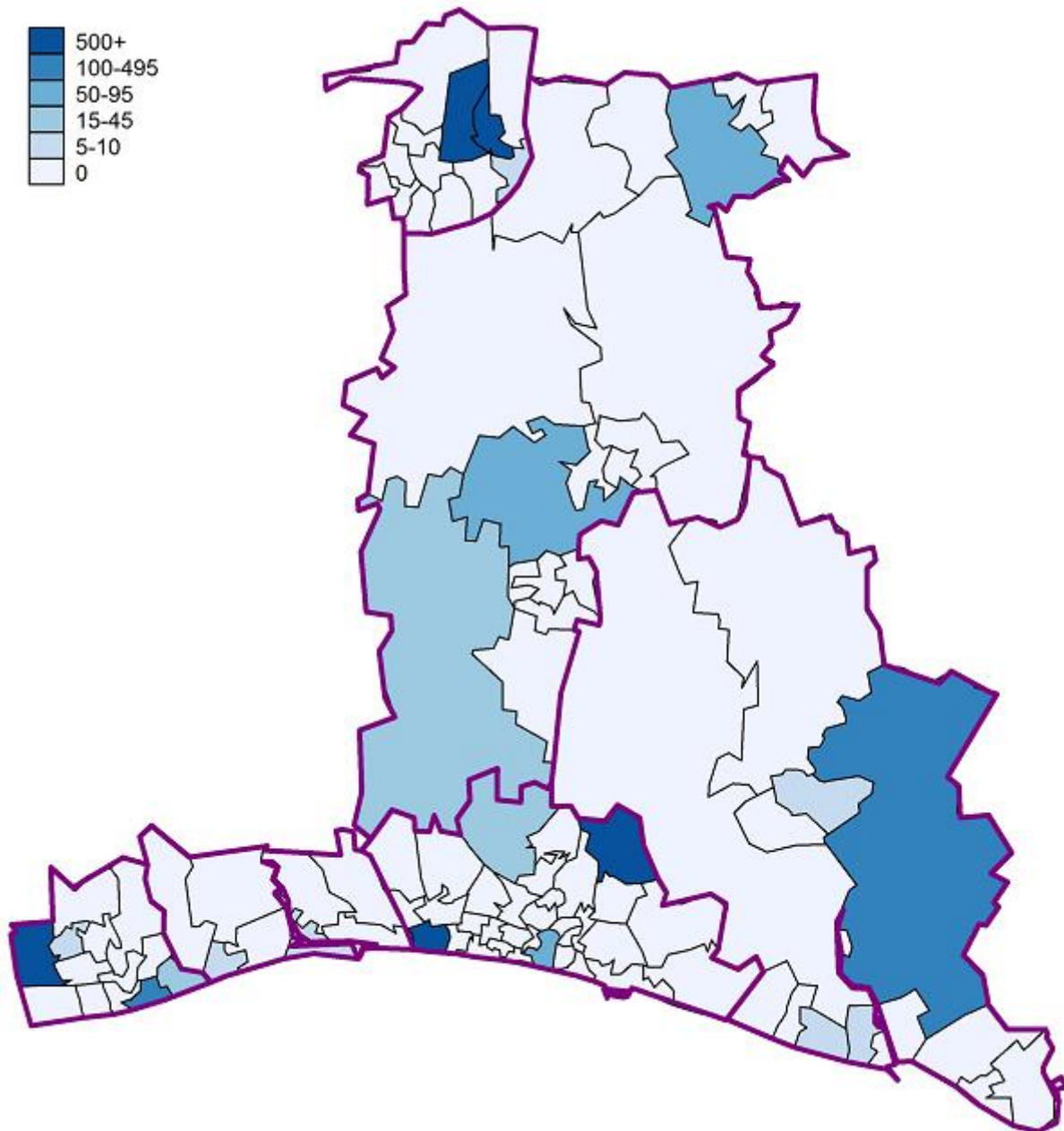
5.2.4 Advanced engineering

Related to the advanced manufacturing sector is Ricardo in Shoreham, who provide advanced engineering solutions to a range of sectors including automotive, rail, defence, motorsport, energy and environment. As a strategic engineering and environmental consultancy they fall under the professional services activities rather than manufacturing (SIC 7112.1 Engineering design activities for industrial process and production) although work closely with manufacturing clients and have a workforce with similar skills to those in advanced manufacturing. Ricardo employ around 600 workers and account for 2.9 per cent of total employment in Adur district, giving a location quotient of nearly 15 (nationally, SIC 7112.1 accounts for 0.2% of total employment).

5.3 Utilities

The broad utilities sector consists of electricity generation and distribution, and the water supply sector. Figure 5.3 shows that employment is concentrated in particular pockets – Manor Royal, Falmer, Hove, and Worthing – with low numbers (or no employment) across much of the City Region.

Figure 5.3: Employment in utilities sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.3.1 Electric power generation and transmission

The electricity generation and distribution sector is twice as large in employment terms in Greater Brighton as it is across the country as a whole. There are 2,700 employees working in 85 establishments who account for 0.70 per cent of total employment, compared with the figure for Great Britain of 0.30 per cent.

Table 10 Sector summary for electric power generation and transmission

Electricity	
Sector definition	3511 : Production of electricity 3512 : Transmission of electricity 3513 : Distribution of electricity 3514 : Trade of electricity
Establishments - Gtr Bton	85
Establishments GB	5,505
Establishment LQ	1.1
Employees - Gtr Bton	2,700
Employees - GB	89,500
Employees - LQ	2.3

Source: ONS BRES data via NOMIS

EDF Energy has large sites in West Hove (c. 1,000 employees) and Three Bridges (c. 300 employees), while UK Power Networks also has a large site in Three Bridges (c. 300 employees) and a smaller one at Ringmer (c. 100 employees). Other significant employers include Doosan Babcock Energy at Manor Royal (c. 400 employees) and Dual Energy in Worthing (c. 150 employees).

There has been a modest increase in employment in Greater Brighton since 2011 of 10 per cent, below the increase nationally of 27 per cent. There were above average increases in employment in Crawley, Lewes and Mid Sussex, albeit from small 2011 levels in the case of Lewes and Mid Sussex. However, there was a large fall in employment in Worthing, from 600 in 2011 to 150 in 2017.

Too recent to have fed into the employment figures is the development of the Rampion Operations and Maintenance base at Newhaven Port, which will be the base for the team who will operate the wind farm when it is complete, and is helping with the regeneration of Newhaven Port as part of the Newhaven Enterprise Zone.

5.3.2 Water

The water sector in Greater Brighton accounts is more than three times larger in relative employment terms and it is across the country, with the 1,600 employees accounting for 0.41 per cent of total employees compared with 0.13 per cent nationally. Nearly 90 per cent of these employees work at the two large Southern Water sites in Worthing (c. 900 employees) and Falmer (c. 500). (It should be noted that BRES data for 2011 did not record the water sector employment at either Falmer or Worthing, and so trend data are not available.)

Table 11 Sector summary for water sector

Water	
Sector definition	3600 : Water collection, treatment and supply
Establishments - Gtr Bton	15
Establishments GB	895
Establishment LQ	1.2
Employees - Gtr Bton	1,600
Employees - GB	37,000
Employees - LQ	3.3

Source: ONS BRES data via NOMIS

5.4 Air transport

The air transport sector is focused around Gatwick Airport and includes repair of aircraft, cargo handling and supporting activities to air transport as well as air transport itself. Figure 5.4 shows the concentration of employment around Gatwick, with some supporting activity employment located in Mid Sussex and Lewes, and also Shoreham Airport.

According to the ONS data, there are around 16,000 employees in the air transport sector in Greater Brighton, who account for nearly eight times as high a proportion of total employment as the national proportion (4.1%, compared with 0.5% nationally).

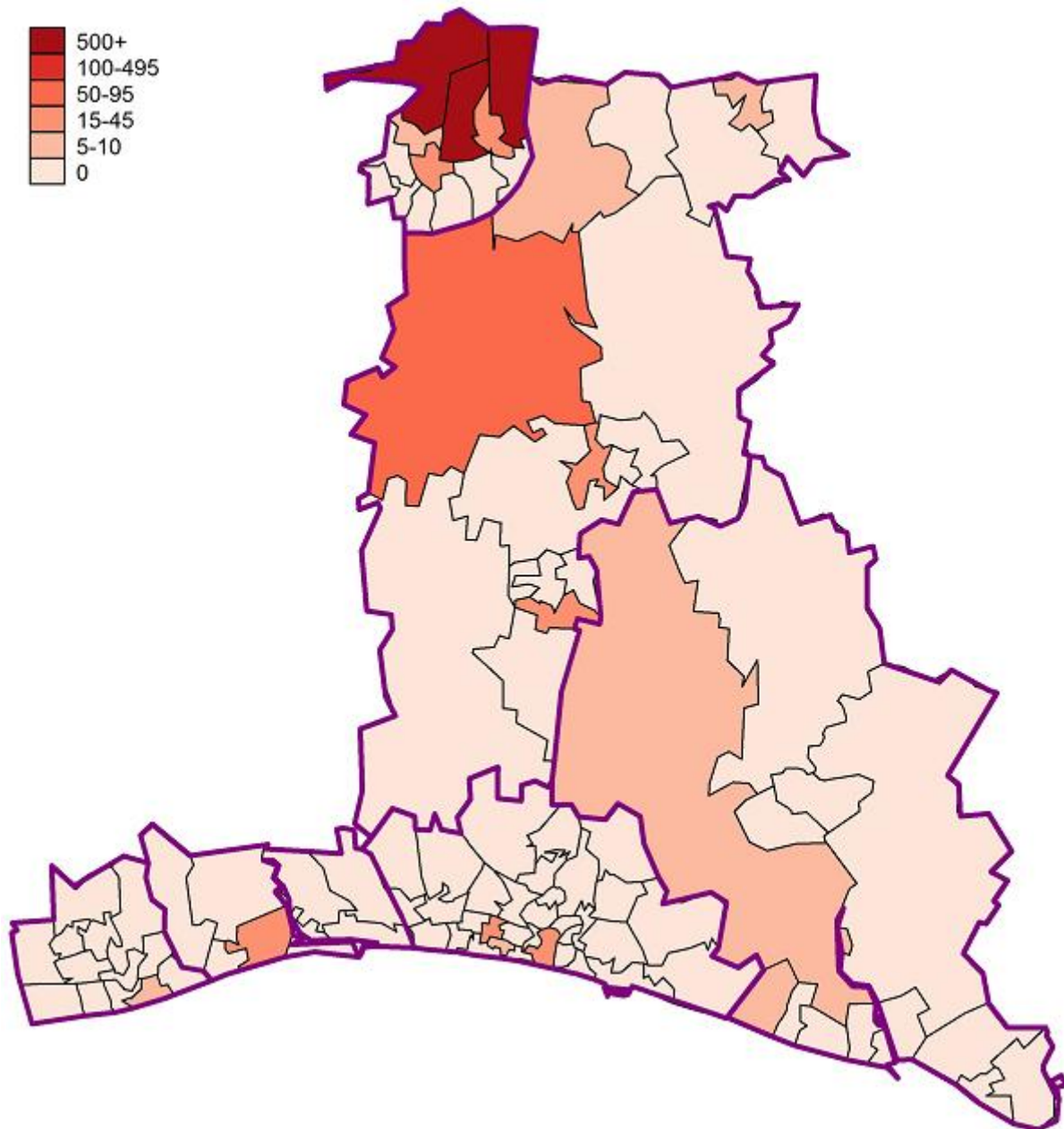
Table 12 Sector summary for air transport sector

Air transport	
Sector definition	3316 : Repair and maintenance of aircraft and spacecraft 5110 : Passenger air transport 5223 : Service activities incidental to air transportation 5224 : Cargo handling
Establishments - Gtr Bton	150
Establishments GB	4,270
Establishment LQ	2.6
Employees - Gtr Bton	16,100
Employees - GB	154,000
Employees - LQ	7.8

Source: ONS BRES data via NOMIS

The airport directly employs around 2,500 workers, but the indirect employment impact is thought to be around 23,000 in total, reflecting not only the supporting activities which are captured in the ONS data, but also the supply chain. Some of the large businesses that support the airport include Alpha and LSG Sky Chefs.

Figure 5.4: Employment in the air transport sector by local area, 2017



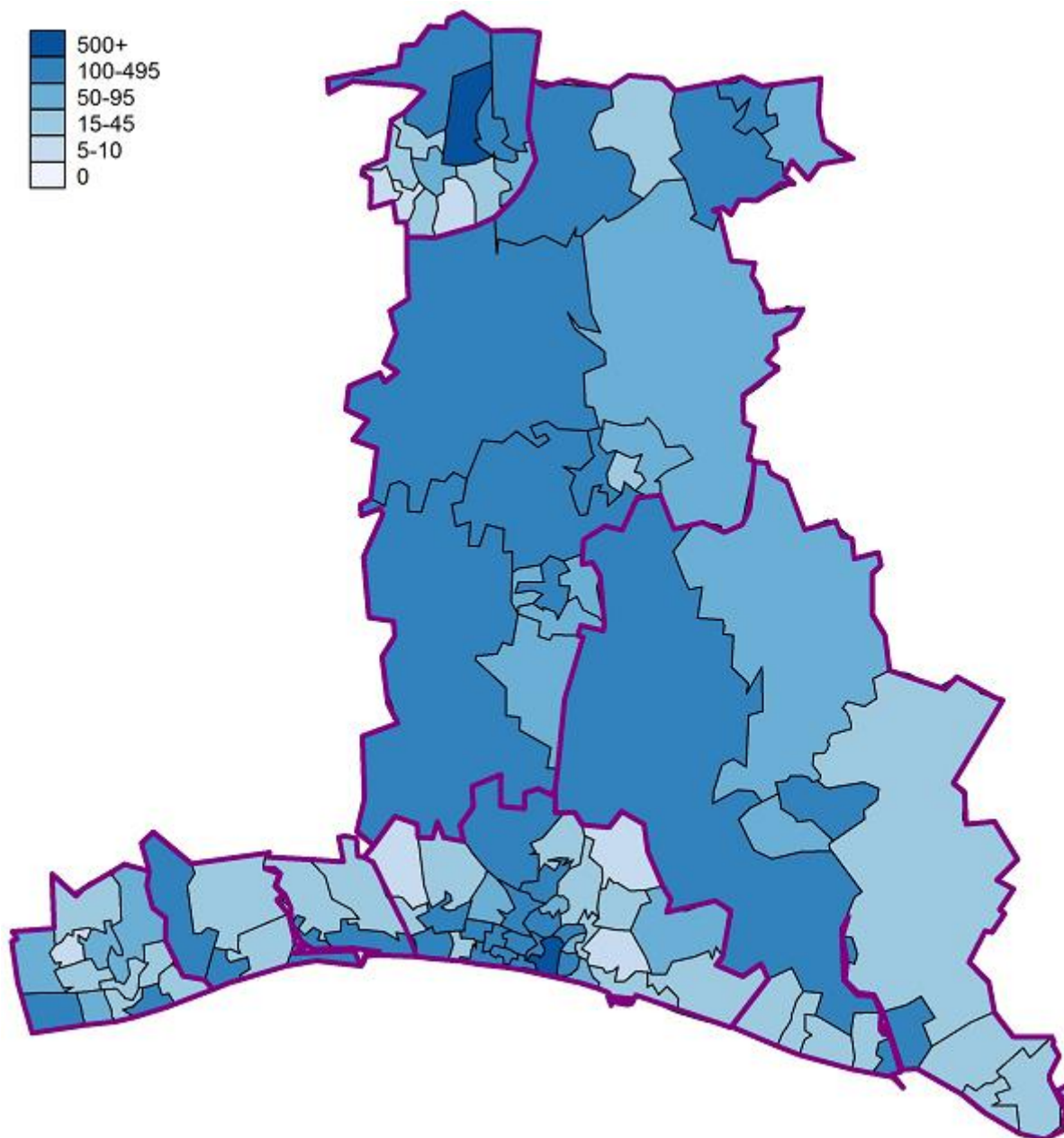
Source: ONS BRES data via NOMIS

Employment in air transport in Greater Brighton decreased slightly between 2011 and 2017, by 2.6 per cent, while nationally employment increased by 14 per cent.

5.5 Information and communication technologies

Three key sectors fall under the broad heading of information and communication technologies – telecommunications, computer software programming and publishing, and data processing and hosting. Figure 5.5 shows that ICT employment is distributed across the Greater Brighton area, although the largest concentrations are in central Brighton and Manor Royal.

Figure 5.5: Employment in information and communication technology sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.5.1 Telecommunications

The other telecommunications sector is only slightly larger in Greater Brighton than it is nationally, with an employment location quotient of 1.2 and an establishment location quotient of 1.1. The 2,500 employees account for 0.63 per cent of total employment, compared with 0.52 per cent nationally, and there are 120 establishments in the sector across Greater Brighton.

Table 13 Sector summary for other telecommunications activities

Telecommunications	
Sector definition	6190 : Other telecommunications activities
Establishments- Gtr Bton	120
Establishments GB	7,930
Establishment LQ	1.1
Employees - Gtr Bton	2,500
Employees - GB	153,500
Employees - LQ	1.2

Source: ONS BRES data via NOMIS

The sector is particularly concentrated in Adur, with an employment location quotient of 5.1, and Brighton (LQ of 1.6). In Adur, Focus Group in Southwick are the largest employer in the sector with over 300 employees, and SCS Telecoms at Lancing Business Park employ around 100 workers. In Brighton, BT has a large presence at Withdean Grange and Cavendish Communications in Newhaven and Spirent in Crawley are also significant employers.

Between 2011 and 2017 employment in the sector in Greater Brighton increased by 49 per cent, which compares with a fall in employment across the country as a whole of 12 per cent. Employment in Adur increased ten-fold, from 50 to 500, and there were also large increases in Brighton and Hove, and in Lewes.

5.5.2 Computer software programming and publishing

The computer software programming and publishing sector in Greater Brighton is large in terms of employment numbers, with nearly 10,000 employees, although as a proportion of total employment it accounts for the same as the national average, 2.5 per cent.

Brighton and Hove accounts for just over half of all employment in the sector in Greater Brighton, and the employment location quotient is 1.5. Mid Sussex is the only other district with an over-representation of employment (LQ of 1.04). Brandwatch is one of the key players in the sector, located in central Brighton, and the games development sector is well represented in Brighton by companies such as BossAlien and Brightrock Games. Lighthouse Systems at Pease Pottage is also a large employer with around 150 employees.

Employment in the sector in Greater Brighton has increased in recently years, although not as fast as across the country as a whole. Between 2011 and 2017 there was an increase of 19 per cent in Greater Brighton which was around half the national increase of 39 per cent over this time. The increases in Brighton and Hove and Lewes were close to the national level, while employment in the sector in Worthing fell by 31 per cent.

Table 14 Sector summary for computer software programming and publishing

Computer software programming and publishing	
Sector definition	5821 : Publishing of computer games 5829 : Other software publishing 6201 : Computer programming activities 6202 : Computer consultancy activities 6203 : Computer facilities management activities 6209 : Other information technology and computer service activities
Establishments- Gtr Bton	2,940
Establishments GB	166,510
Establishment LQ	1.3
Employees - Gtr Bton	9,700
Employees - GB	747,875
Employees - LQ	1.0

Source: ONS BRES data via NOMIS

5.5.3 Data processing/hosting

The data processing and hosting sector is concentrated in Crawley, where the sector is three times larger than average, although across Greater Brighton as a whole there is only a small over-representation compared with the national picture. Rackspace and 4D have large data centres at Manor Royal.

Table 15 Sector summary for data processing and hosting

Data processing and hosting	
Sector definition	6311 : Data processing, hosting and related activities 6312 : Web portals
Establishments- Gtr Bton	90
Establishments GB	4,875
Establishment LQ	1.4
Employees - Gtr Bton	800
Employees - GB	52,000
Employees - LQ	1.1

Source: ONS BRES data via NOMIS

As with the software sector, there was a below average increase in employment in the data processing and hosting sector in Greater Brighton between 2011 and 2017; employment increased by 22 per cent compared with the national increase of 35 per cent. Employment in Crawley, where most employment is concentrated, increased by 11 per

cent, while employment in Brighton and Hove increased by 38 per cent, from just over 100 to just under 150.

An issue was raised that growth in activity in this sector may not necessarily be reflected in increases in employment, as the sector has a large land/office space requirement for the hardware but does not employ many people in relation to the land/building space ie has a low employment density in comparison with other sectors.

5.5.4 Digital infrastructure

There were a number of comments made by interviewees about using digital infrastructure improvements as a measure to attract and grow digital businesses. In coastal West Sussex there are plans by West Sussex County Council to improve connectivity – “gigabit the coast” – which will support Worthing’s aims to develop digital sectors as a strategic growth area, Mid Sussex has received funding from the Local Full Fibre Network (LFFN) fund for ultrafast broadband in Burgess Hill, and Brighton and Hove and East Sussex are considering LFFN bids. Crawley has also identified digital sectors as a strategic growth area, and fill in the gap between Croydon and Brighton which are both strong in terms of digital businesses and employment; upgrading connectivity in Manor Royal from ‘superfast’ (100Mbps) to ‘ultrafast’ (Gigabit) will support that ambition.

5.6 Insurance and financial services

The insurance and financial services sector encompasses all those elements in insurance and finance except high street banking.

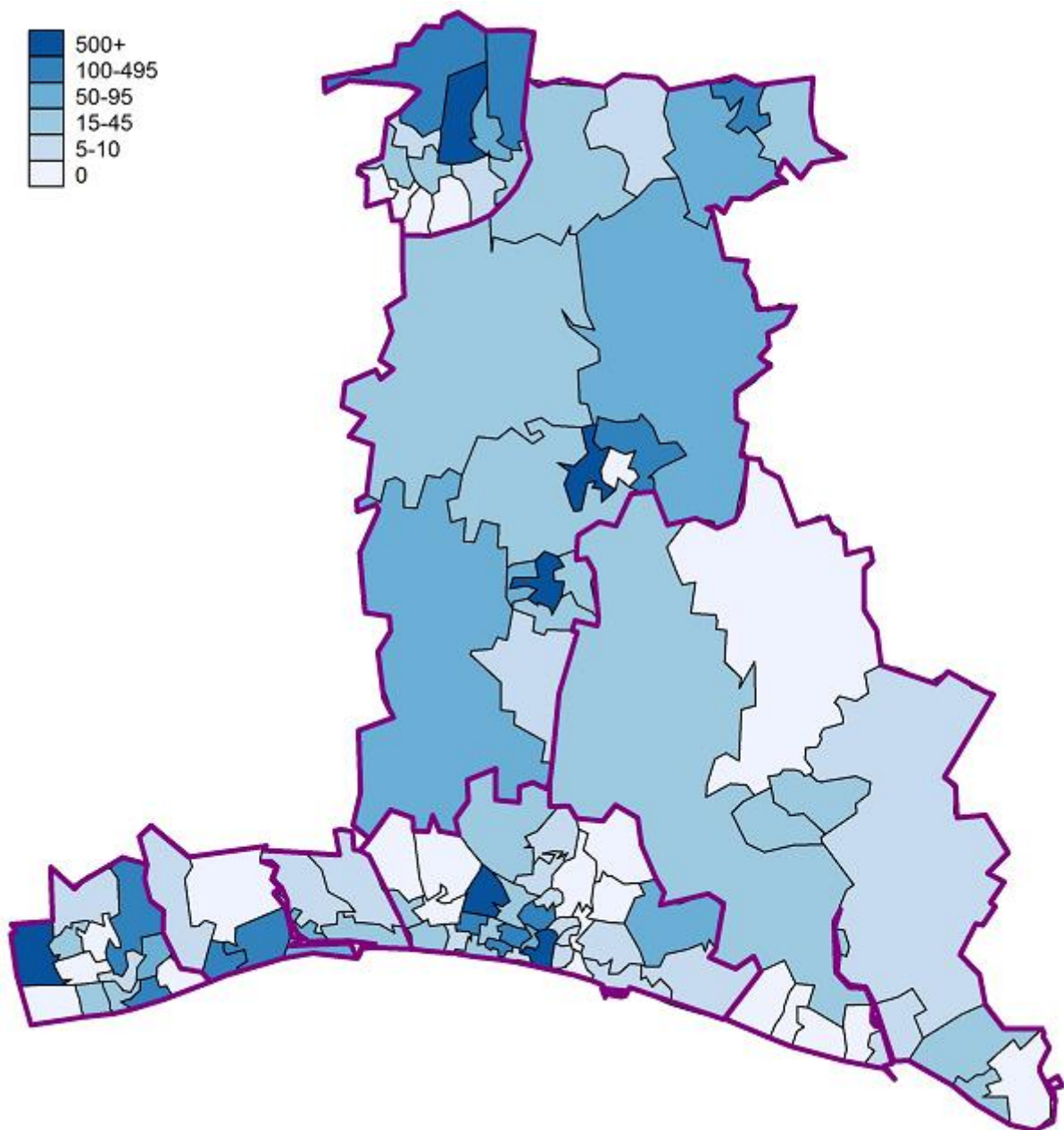
The insurance and financial services sector in Greater Brighton employs around 14,000 workers and is nearly twice as large in relative terms as the national average, accounting for 3.6 per cent of total employment compared with 2.0 per cent nationally. Within Greater Brighton, the sector is most concentrated in Brighton and Hove (LQ of 2.8) and Mid Sussex (LQ of 2.1). Figure 5.6 shows pockets of employment in central Brighton, Hove, Worthing, Burgess Hill, Haywards Heath, and Manor Royal.

Brighton and Hove is home to American Express and Legal and General, who each have more than 1,500 employees at their sites in central Brighton and Hove Park respectively. There is a cluster of large insurance firms by Brighton Station, with Aviva, Black Lion Insurance, MetLife and BUPA Global being located in the New England Quarter.

In Mid Sussex, American Express has a large site in Burgess Hill, and Zenith Insurance and 1st Central Car Insurance in Haywards Heath each have several hundred employees.

Outside of these two districts, Crawley is home to B&CE at Manor Royal who have over 400 employees, and EQ Shareview in Worthing is also a major employer.

Figure 5.6: Employment in insurance and financial services by local area, 2017



Source: ONS BRES data via NOMIS

Table 16 Sector summary for insurance and financial services

Insurance and financial services	
Sector definition	6491 : Financial leasing 6492 : Other credit granting 6499 : Other financial service activities, except insurance and pension funding, n.e.c. 6511 : Life insurance 6512 : Non-life insurance 6520 : Reinsurance 6530 : Pension funding 6611 : Administration of financial markets 6612 : Security and commodity contracts brokerage 6619 : Other activities auxiliary to financial services, except insurance and pension funding 6621 : Risk and damage evaluation 6622 : Activities of insurance agents and brokers 6629 : Other activities auxiliary to insurance and pension funding
Establishments - Gtr Bton	645
Establishments GB	51,495
Establishment LQ	0.9
Employees - Gtr Bton	14,000
Employees - GB	584,000
Employees - LQ	1.8

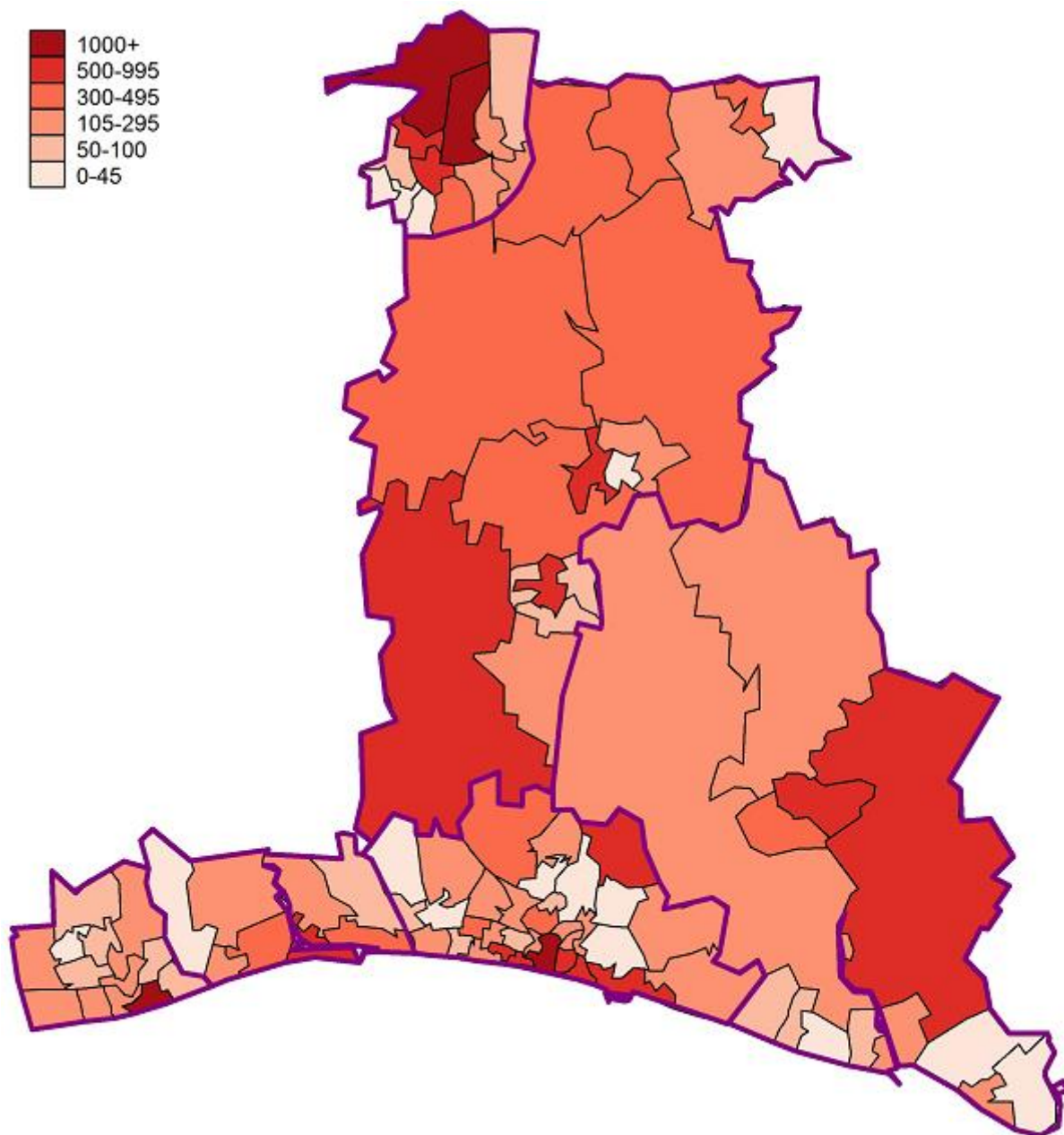
Source: ONS BRES data via NOMIS

Employment in insurance and financial services has grown much faster in Greater Brighton than in the country as a whole. Between 2011 and 2017 there was an increase of 24 per cent in Greater Brighton, which was nearly five times as large as the national increase of five per cent. The employment level in Brighton and Hove increased by nearly 2,000 workers, or 36 per cent, while there were larger relative increases in Crawley (50%) and Adur (127%). However, in the other three districts there were decreases in employment, ranging from a two per cent fall in Mid Sussex, to a 21 per cent fall in Lewes.

5.7 Travel and visitor economy

This broad sector covers travel agency and tour operator activities, and sectors associated with visitors to the area such as accommodation, food and drink, and visitor attractions. Figure 5.7 shows that employment is distributed fairly evenly across the Greater Brighton districts, apart from some outer suburban areas, but with concentrations in central Brighton and Worthing, and around Gatwick airport (including large travel/tourism companies at Manor Royal).

Figure 5.7: Employment in travel and visitor economy sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.7.1 Travel and tourism

There are nearly three times as many employees working in the travel and tourism sector in Greater Brighton as there are in the country as a whole. Around 3,800 employees work in this sector in Greater Brighton, who account for just under one per cent of total employment, compared with 0.33 per cent nationally.

Table 17 Sector summary for travel and tourism

Travel and tourism	
Sector definition	7911 : Travel agency activities 7912 : Tour operator activities 7990 : Other reservation service and related activities
Establishments - Gtr Bton	205
Establishments GB	10,990
Establishment LQ	1.4
Employees - Gtr Bton	3,800
Employees - GB	97,400
Employees - LQ	2.9

Source: ONS BRES data via NOMIS

The sector is heavily concentrated in Crawley, which accounts for nearly half of all employment across the Greater Brighton area, and has an employment location quotient of 5.8. Virgin Holidays is the largest employer in sector, with the company headquarters at Manor Royal in newly built office complex. Brighton and Hove also has an over-representation (LQ of 3.1), with employment concentrated in the city centre and at the marina.

Employment in the sector in Greater Brighton fell between 2011 and 2017, by 19 per cent, compared with an increase nationally of five per cent.

5.7.2 Visitor economy

The visitor economy sector is the largest and most generic of the key sectors in Greater Brighton. There are nearly 35,000 employees, although the proportion of total employment is only slightly above the national average (8.9% compared with 7.9%), giving an employment location quotient of 1.1, while there is a slightly greater over-representation when looking at establishments (LQ of 1.2).

Brighton and Hove has the highest proportion of employment in the visitor economy (11%, LQ of 1.4), followed by Lewes (9.2%, LQ of 1.2) while Worthing has the lowest proportion (5.7%, LQ of 0.7).

Employment growth in the visitor economy has been lower in Greater Brighton than in the country as a whole, with an increase in employment locally between 2011 and 2017 of seven per cent, while nationally employment increased by 22 per cent over this time. Adur and Lewes experienced the largest increases in employment, of 66 per cent and 26 per cent respectively, while employment in the visitor economy in Brighton and Hove fell during this period, by six per cent. In terms of future developments, Crawley is looking to develop the evening economy around the historic High Street, via the Historic High Street Forum of businesses.

Table 18 Sector summary for visitor economy

Visitor economy	
Sector definition	5510 : Hotels and similar accommodation 5610 : Restaurants and mobile food service activities 5621 : Event catering activities 5629 : Other food service activities 5630 : Beverage serving activities 9001 : Performing arts 9002 : Support activities to performing arts 9003 : Artistic creation 9004 : Operation of arts facilities 9102 : Museum activities 9103 : Operation of historical sites and buildings and similar visitor attractions 9104 : Botanical and zoological gardens and nature reserve activities 9321 : Activities of amusement parks and theme parks 9329 : Other amusement and recreation activities
Establishments - Gtr Bton	3,590
Establishments GB	224,830
Establishment LQ	1.2
Employees - Gtr Bton	34,900
Employees - GB	2,330,500
Employees - LQ	1.1

Source: ONS BRES data via NOMIS

5.8 Higher education

The two universities in Brighton together employ around 6,000 staff, and account for 4.4 per cent of employment in Brighton and Hove, and 1.5 per cent of all employment across Greater Brighton. This latter proportion is the same as the national proportion, giving a Greater Brighton location quotient of 1.0, although the LQ in Brighton and Hove is 2.9. Employment in local HE has grown slightly faster than the national rate, with employee numbers increasing by 20 per cent in Brighton and Hove between 2011 and 2017 compared with 15 per cent nationally.

In addition to their presence as large businesses in their own right, the work of the universities supports local businesses across a wide range of sectors, through:

- Opportunities for students to undertake work placements which are often based around a particular project.
- Knowledge Transfer Partnerships which are longer programmes (1-3 years) for graduates but again based around a strategic project for the business.

- Strong links between academics and business through industry advisory boards, which helps to ensure that curriculum is relevant for business needs.
- Sharing resources – for example Ricardo has test facilities at the University of Brighton and run experiments there with engineering students.
- Supporting commercial opportunities from research, eg Sussex Innovation Centre.
- Supply of labour to universities – many academic staff come from major businesses such as Ricardo and GlaxoSmithKline.

5.9 Other miscellaneous sectors

The analysis of the ONS employment data identified two additional sectors that are over-represented in Greater Brighton but do not have the characteristics of key priority sectors for development. In addition, the retail sector is a major employer, with particular specialisms in certain areas.

The regulatory activities of the public sector are over-represented, accounting for more than twice the national proportion of employment (c. 3,000 employees who account for 0.79% of Greater Brighton employment, compared with 0.33 per cent nationally). The Pensions Regulator in central Brighton is one of the largest organisations in this sector (and Brighton and Hove has a LQ of 5).

The combined facilities support activities sector provides facilities management services to businesses across a range of sectors. OCS Group UK are head-quartered at Tilgate Business Park in Crawley and co-ordinate the 8,000 strong national workforce (in the BRES data, all employees are registered at this site), of which a substantial proportion are likely to serve Gatwick Airport and Manor Royal.

The retail sector employs around 40,000 workers across Greater Brighton, accounting for 10.3 per cent of all employment, slightly above the national figure of 9.5 per cent. Adur has the largest retail sector, accounting for 12.6 per cent of employment, and Crawley the smallest (8.8%). Retail sale of cultural and recreational goods, and retail sale via mail order, are over-represented compared to the national picture, and are particularly strong in Crawley, and in Lewes and Worthing respectively. Retail employment has grown nearly twice as fast in Greater Brighton as in the country as a whole since 2011 (7.2%, compared with 3.7% for Great Britain), with Crawley experiencing the fastest growth (15.4%) followed by Mid Sussex (11.7%) and Lewes (11.0%), while in Adur employment in retail fell by 3.9 per cent between 2011 and 2017.

Appendix

List of stakeholder organisations

- Adur & Worthing Business Partnership
- Adur & Worthing Councils
- Brighton and Hove City Council
- Brighton & Hove Economic Partnership
- Coast-to-Capital Local Enterprise Partnership
- Coastal West Sussex Partnership
- Crawley Borough Council
- DiT Investment Services
- DiT Trade & Export
- Gatwick Diamond
- Greater Brighton Metropolitan College
- Lewes District Council
- Manor Royal Business Improvement District
- Mid Sussex District Council
- South Downs National Park Authority
- Southern Water
- Sussex Chamber of Commerce
- University of Brighton
- University of Sussex
- West Sussex County Council

Data tables

Table 19 Establishments by industrial sector, Greater Brighton, 2018

	Establishments	Per cent	GB %
Agriculture, forestry and fishing	535	1.3	4.4
Mining and quarrying	10	0.0	0.1
Manufacturing	1,605	3.9	4.7
Electricity, gas	95	0.2	0.2
Water supply etc	125	0.3	0.4
Construction	4,540	11.0	10.9
Wholesale and retail trade	6,870	16.6	16.2
Transportation and storage	1,045	2.5	4.1
Accommodation and food	2,735	6.6	6.4
Information and communication	4,170	10.1	7.4
Financial and insurance activities	910	2.2	2.4
Real estate activities	1,400	3.4	3.5
Professional, scientific and technical activities	6,965	16.9	15.8
Administrative and support service activities	3,705	9.0	8.6
Public administration and defence	245	0.6	0.8
Education	1,020	2.5	2.3
Human health and social work activities	2,275	5.5	5.4
Arts, entertainment and recreation	1,430	3.5	2.7
Other service activities	1,635	4.0	3.8
Total	41,310	-	-

Source: ONS Business Count via NOMIS

Table 20 Establishments by sector and Greater Brighton district, 2018 (%)

	Adur	BH	Crawley	Lewes	Mid Sussex	Worthing	G Bton	GB
Agriculture, forestry and fishing	0.9	0.3	0.2	3.8	2.9	0.2	1.3	4.4
Mining and quarrying	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Manufacturing	6.7	2.7	4.0	5.4	4.2	4.2	3.9	4.7
Electricity, gas	0.2	0.1	1.1	0.1	0.2	0.1	0.2	0.2
Water supply etc	0.7	0.2	0.3	0.5	0.3	0.3	0.3	0.4
Construction	17.5	8.6	10.3	12.2	12.4	12.4	11.0	10.9
Wholesale and retail trade	17.3	17.9	18.0	15.1	14.0	17.0	16.6	16.2
Transportation and storage	3.7	1.2	7.9	2.7	2.1	2.0	2.5	4.1
Accommodation and food	5.8	7.8	7.1	5.6	4.6	7.2	6.6	6.4
Information and communication	7.2	12.4	8.2	7.8	9.7	8.4	10.1	7.4
Financial and insurance activities	2.2	1.7	2.7	1.7	3.0	2.4	2.2	2.4
Real estate activities	2.2	3.8	2.3	3.5	3.5	3.6	3.4	3.5
Professional, scientific and technical activities	12.8	17.6	12.9	17.6	19.3	15.1	16.9	15.8
Administrative and support service activities	8.0	8.7	11.6	7.6	9.3	8.7	9.0	8.6
Public administration and defence	0.6	0.5	0.8	0.8	0.4	0.7	0.6	0.8
Education	2.6	2.5	2.4	2.7	2.5	2.2	2.5	2.3
Human health and social work activities	5.0	5.5	4.8	5.3	4.9	8.1	5.5	5.4
Arts, entertainment and recreation	2.4	4.7	1.8	4.1	2.5	2.5	3.5	2.7
Other service activities	4.5	3.7	3.9	3.7	3.9	4.8	4.0	3.8
All establishments	2,690	16,200	4,620	5,035	8,250	4,525	41,310	-

Source: ONS Business Count via NOMIS

Table 21 Birth rates of new enterprises and death rates of enterprises 2012-17 (%)

		2012	2013	2014	2015	2016	2017
Gtr Bton	Births	11.2	13.5	13.3	13.4	13.0	12.1
	Deaths	10.8	9.9	9.4	10.4	10.0	11.0
Adur	Births	9.7	12.8	11.3	12.7	12.0	11.1
	Deaths	9.2	8.5	9.4	8.4	9.8	9.6
B&H	Births	12.5	14.6	14.6	14.3	13.8	13.3
	Deaths	10.7	10.6	9.8	11.2	10.9	11.6
Crawley	Births	12.9	15.9	13.8	16.6	16.5	13.2
	Deaths	11.8	10.6	11.1	11.1	11.2	12.3
Lewes	Births	9.1	12.4	11.4	11.1	10.7	9.8
	Deaths	10.7	8.6	7.8	9.5	8.6	9.5
Mid Sussex	Births	9.9	11.7	12.4	12.2	12.1	11.3
	Deaths	10.4	9.1	8.6	9.4	8.7	10.6
Worthing	Births	11.0	12.7	13.1	12.5	11.2	11.5
	Deaths	12.0	10.7	9.5	11.0	9.8	11.1
UK	Births	11.3	14.1	13.7	14.3	14.6	13.1
	Deaths	10.6	9.7	9.7	10.6	10.2	12.2

Source: ONS Business demography, UK

Subject:	Arun District Council – Invitation to join the Greater Brighton Economic Board		
Date of Meeting:	26 March 2019		
Report of:	Chair, Greater Brighton Officer Programme Board		
Contact Officer:	Name:	Nick Hibberd	Tel: 01273 293020
	Email:	Nick.Hibberd@brighton-hove.gov.uk	
Ward(s) affected:	All		

FOR GENERAL RELEASE**1. PURPOSE OF REPORT AND POLICY CONTEXT**

- 1.1 The Greater Brighton Economic Board (“the Board”) was established in 2014 as part of the Greater Brighton City Region Deal with Government.
- 1.2 The Board comprises the Greater Brighton Economic Joint Committee (“GBEJC”), on which the local authorities are represented; and the Greater Brighton Business Partnership (“GBBP”), on which the Coast to Capital Local Enterprise Partnership, business, university and further education sectors, and South Downs National Park Authority are represented. Meetings of the Board compromise concurrent meetings of GBEJC and GBBP.

2. RECOMMENDATIONS:

- 2.1 That the Board agrees to formally invite Arun District Council to become a constituent member of the Board, joining the GBEJC subject to both their agreement and formal ratification from the Board’s member organisations.

3. CONTEXT/ BACKGROUND INFORMATION

- 3.1 The functions of the Board are as follows:
 - i. To make long term strategic decisions concerning regional economic development and growth;
 - ii. To be the external voice to Government and investors regarding the management of devolved powers and funds for regional economic growth;
 - iii. To work with national, sub-national (in particular the Coast to Capital Local Enterprise Partnership) and local bodies to support a co-ordinated approach to economic growth across the Region;
 - iv. To secure funding and investment for the Region;
 - v. To ensure delivery of, and provide strategic direction for, major projects and work streams enabled by City Deal funding and devolution of powers;

- vi. To enable those bodies to whom section 110 of the Localism Act 2011 applies to comply more effectively with their duty to co-operate in relation to planning of sustainable development.
- vii. To incur expenditure on matters relating to economic development where funds have been allocated directly to the Board for economic development purposes.

3.2 The following bodies were original members of the Board:

- i. Brighton & Hove City Council
- ii. Adur District Council
- iii. Worthing Borough Council
- iv. Lewes District Council
- v. Mid-Sussex District Council
- vi. University of Sussex
- vii. University of Brighton
- viii. Further Education Representative
- ix. Coast to Capital Local Enterprise Partnership
- x. Brighton & Hove Economic Partnership
- xi. Adur & Worthing Business Partnership
- xii. Coastal West Sussex Partnership
- xiii. South Downs National Park Authority

The GBEJC comprised the bodies specified in paragraphs 1.3(i) to (v); and GBBP comprised the bodies specified in paragraphs 1.3(vi) to (xiii).

3.3 Board membership has been extended once since the Board's inception; in February 2018 Crawley Borough Council and Gatwick Airport joined the GBEJC and GBBP respectively.

3.4 Arun District Council attended as observers to the Board meeting on 16 October 2018, and on 29 October 2018 wrote a letter to the Chair formally requesting to join the Board.

3.5 Working in partnership, the Greater Brighton City Region has brought significant benefits to the partner Local Authorities and agencies. Together the partnership has secured around £160m of Growth Deal funding held by the Coast to Capital Local Enterprise Partnership.

3.6 The Board's success and growing reputation has gained interest across the region, and Crawley Borough Council and Gatwick Airport Ltd joined the partnership in February 2018. At the start of 2019 a set of Five Year Strategic Priorities was agreed by the Board. As part of developing the priorities, consideration was given to what the future membership of the Board would look like, and how it might evolve over the next five years. It was agreed that the Board should adopt a fair and consistent approach to organisations that express an interest in joining, and for proposed new members consideration would need to be given to the following five questions;

- i. Does the organisation buy into the Board's agreed vision and priorities?

- ii. Do they share economic characteristics and represent the Greater Brighton functional economic area?
 - iii. Do they add capacity to help the Board deliver on its agreed vision and priorities?
 - iv. Will they add to the Board's reputation, in terms of legitimacy, standing and reach?
 - v. Are they going to actively participate and commit resource to supporting the Board and deliver the work programme?
- 3.7 The Board is asked to extend its geographical remit and membership; formally inviting Arun District Council to become a constituent member of the Joint Committee. This is subject to the approval of Arun District Council. It would also trigger a variance in the Board's Heads of Terms that will require the formal ratification of all Joint Committee members.

3.8 Some points for consideration are summarised below;

Functional Economic Area

- 3.8.1 Recent work undertaken by the West Sussex and Greater Brighton Strategic Planning Board has recognised that Arun lies within both the Housing Market area and Functional Economic Market Area of that part of the coast including all or parts of Adur, Worthing, Brighton & Hove, Lewes and Mid Sussex.
- 3.8.2 Arun is a net exporter of workers to the City Region, as well as forming part of its housing market. Based on 2011 Census data, Arun provides jobs for around 4,500 Greater Brighton residents, whilst 9,000 of Arun's residents were employed across the City Region. Aligning strategy and investment activity would add value.
- 3.8.3 Arun can add much to the critical mass and economic diversity of the Greater Brighton City Region economy. Arun's economy supports around 55,000 jobs, and the addition of Arun to Greater Brighton would take the City Region's job base (currently circa 475,000) to over half a million, which would be a significant milestone. The current Gross Value Added (GVA) of Greater Brighton is around £23.1bn. Arun's economy currently generates around £2.3bn GVA, which would represent a 10% uplift to the current Greater Brighton Economy.
- 3.8.4 In terms of job growth, estimates from Experian indicate that Greater Brighton could grow by around 73,000 jobs over the next 20 years, with growth in Arun being around 5,300 new jobs over the same time period. If included in Greater Brighton, the projected job growth in Arun would provide an uplift of around 7% to the City Region total.
- 3.8.5 Arun has a broad-based economy including representation in a number of high-value sectors including knowledge-based manufacturing and advanced engineering activities. The greatest uplift to Greater Brighton's current GVA would be seen in the agriculture, construction, accommodation and food services and wholesale and retail sectors.
- 3.8.6 This reflects that Arun has local sector concentrations in construction, wholesale and retail, accommodation and food services, real estate, public administration

and defence, human health and social work and arts, entertainment and recreation. The key sector strength in Arun is accommodation and food service activities, in particular restaurants and mobile food service activities, and holiday and short stay accommodation.

- 3.8.7 In addition, Arun has a distinct local concentration of knowledge-based manufacturing and engineering activities. Supporting growth in specialised and highly-productive industries is a key objective of the Government's Industrial Strategy. There are a number of advanced engineering/manufacturing firms within Arun, hence Arun's businesses could be well placed to respond.

Housing Delivery

- 3.8.8 Arun provides a source of relatively affordable housing that contributes to the functioning of the Greater Brighton economy. ONS statistics show that in 2016 around 1,900 people moved out of Greater Brighton and into the Arun region, specifically from Worthing and Brighton & Hove. The District has significant potential to increase future capacity for housing and employment space in Greater Brighton. Current Local Plans for the six Greater Brighton local authorities give a combined figure of around 49,000 new homes to be built up to 2032. Arun's Local Plan, which was adopted in June 2018, makes provision to deliver 20,000 dwellings over the period. This would increase the City Region's housing delivery by 40%.
- 3.8.9 The Arun Local Plan proposes a wide range of housing allocations including several large-scale strategic sites which will provide sustained high levels of deliver over the medium and long term. When considered in the context of the housing trajectories published by the Greater Brighton local authorities to 2026, this indicates that Arun could be contributing about 32% of housing delivery in the City Region by 2022/23.

Employment Land Supply

- 3.8.10 In addition to housing, the Arun Local Plan makes provision for significant capacity for additional employment floor space, which could supplement the City Region's constrained supply. The Local Plan provides allocations for around 292,000m² of floor space capacity. The most significant allocation is Enterprise Bognor Regis and this space has started to come forward for development. These allocations would be the largest in Greater Brighton, with the next highest being the proposed 200,000m² of commercial space across strategic employment sites in Burgess Hill.
- 3.8.11 Commercial property market intelligence indicates that businesses from Greater Brighton, particularly along the coast, seeking new accommodation for expansion or upgrading would be likely to consider Arun if there was a lack of suitable floor-space in their districts, particularly as regards larger space requirements. This has recently been demonstrated by the Rolls Royce expansion in Bognor Regis, away from the company's Goodwood base at Chichester.
- 3.8.12 Arun is likely to play an increasingly important role in accommodating some of the commercial property needs of Greater Brighton and the A27 corridor in particular. This might apply both to occupiers relocating from more constrained

locations, but importantly being retained within the City Region, or working to a “hub and spoke” model whereby they structure their operations and supply chains across a range of locations.

Skills

3.8.13 Chichester University (Bognor Regis Campus) has invested over £50m with direct assistance from the Council for the new Learning and Resource Centre and the new Tech Park at the Bognor Regis Campus. The Learning Resource Centre will promote STEM courses and bring 1,500 new students to the town. The council has also developed Enterprise@Bognor Regis with a Local Development Order which has unlocked sites for development, resulting in attracting Rolls Royce to create a new logistics and finishing site.

Infrastructure and Other Priorities

3.8.14 The ambition and vision for housing outlined in 3.8.8-3.8.9 require significant infrastructure support. Arun’s Infrastructure Delivery Plan sets out the requirements, which include the development of a new secondary school and nine primary schools on top of current educational expansion. The A27, A259 east-west corridor and north-south A23 corridor are both key priorities for Arun.

3.8.15 Arun can actively contribute to the Board’s future work plan, particularly on housing, economic growth, strategic planning and adding new projects to the pipeline for future funding bids to Government and others.

3.8.16 Arun’s membership would give additional capacity and capability to deliver sub-regional spatial priorities in a coordinated way, building on existing mechanisms such as the West Sussex and Greater Brighton Strategic Planning Board.

4 ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

4.1 The alternative would be for the membership to remain as it is currently, but for the reasons outlined in 3.8.1-3.8.16, the recommendation is that Arun District Council should be formally invited to join the Board

5 COMMUNITY ENGAGEMENT & CONSULTATION

5.1 The governance committees of constituent Board members will be consulted as part of the changes to Heads of Terms.

6 CONCLUSION

6.1 Arun exhibits strong economic and functional relationships with Greater Brighton and provides a complementary offer. Extending membership of the Board to Arun would give scope to further exploit the synergies between the local economies through coordinated investment and strategy, to the benefit of both Arun and Greater Brighton more widely.

6.2 The Board is asked to note the benefits of Arun District Council joining the Board and accordingly approve the extension in membership; formally inviting Arun

District Council to become a constituent member of the Joint Committee. This is subject to the approval of Arun District Council. It would also trigger a variance in the Board's Heads of Terms that will require the formal ratification of all Joint Committee members.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 Constituent members make annual contributions toward the operational costs of the GBEB. These operational costs include running costs such as employees, legal, finance, administrative and democratic services support. The contribution also supports specific work plans which are reported to this board throughout the year. The member's contributions are based upon the organisation's percentage of working population. Contributions will be sought from Arun District Council for the financial years following ratification in accordance with the methodology used to calculate the contributions from current members.

*Finance Officer Consulted: Rob Allen, Principal Accountant
Date: 12/03/19*

Legal Implications:

- 7.2 The GBEJC is a joint committee established pursuant to section 102 of the Local Government Act 1972. The Local Government Act 1972 and The Local Authorities (Arrangement for the Discharge of Functions (England) Regulations 2012 requires the constituent authorities of a joint committee to decide the membership of that committee. The constituent authorities can make the decision that Arun District Council can become a constituent member of the Board.

*Lawyer Consulted: Joanne Dougnaglo Senior Property Lawyer
Date: 11/03/19*

Equalities Implications:

- 7.3 The Economic benefits of Arun District Council joining the Board are set out in section 3 of this report and include opportunities relating to housing, employment space, skills and strategic planning all of which contribute to economic growth for the city region and greater opportunities for its residents.

Sustainability Implications

- 7.4 Arun exhibits strong economic and functional relationships with Greater Brighton and provides a complementary offer. Extending membership of the Board will provide a stronger, collective voice to support the resilience of the local economies to the benefit of both Arun and Greater Brighton more widely.

SUPPORTING DOCUMENTATION

Appendices:

None

Subject:	Greater Brighton Investment Programme – Progress Update		
Date of Meeting:	26th March 2019		
Report of:	Chair, Greater Brighton Officer Programme Board		
Contact Officer:	Name:	Nick Hibberd	Tel: 01273 293756
	Email:	Nick.Hibberd@brighton-hove.gov.uk	
LA(s) affected:	All		

FOR GENERAL RELEASE

1. PURPOSE OF REPORT AND POLICY CONTEXT

- 1.1 The purpose of the Investment Plan Update is to provide the Greater Brighton Economic Board (“the Board”) with an update on progress on the Greater Brighton Investment Programme (“the Investment Programme”) since the Board’s last meeting on 29th January 2019.
- 1.2 Updates are included on the Local Growth Fund (LGF) allocations made as part of the Growth Deal Rounds 1, 2 and 3. The period covered by this report is 1 October 2018 to 30 December 2018.
- 1.3 This cover report provides some context on the LGF Funding Rounds and narrative updates on the Investment Programme projects. Further details on the individual projects can be found in the Investment Programme Update report at Appendix 1.

2. RECOMMENDATIONS:

- 2.1 That the Board note the report and the Investment Programme Update at Appendix 1.

3. CONTEXT/BACKGROUND INFORMATION

LGF Growth Deal Rounds 1 & 2

- 3.1 A total of approximately £90m was allocated to projects across the City Region from LGF Growth Deal rounds 1 & 2. These projects will deliver a total investment of approximately £376m into the City Region, unlocking an estimated 14,000 jobs, 8,200 homes and 450,000sqm of employment floor-space. Current active projects are listed below with a summary of progress since the last update.
- 3.1.1 *Flood Alleviation Scheme (Newhaven) £7.5m*

January to March 2019 saw progress in the Port area of the scheme but continued frustration concerning the development of a flood barrier over the railway line. The rail flood barrier is required for protection against indirect

flooding following storm surge overtopping in the Ouse floodplain. This is being held up due to difficulties reconciling respective institutional requirements on future liabilities. A potential 'backstop' is the approval of an emergency response plan for the 25m gap in flood defences over the railway in the scheme's Area 1, north of Newhaven. There is better news from the Port area of the scheme, where we have pioneered the trial use of cement-free concrete in a short flood wall and this is may be the first use of this innovative low-carbon building material in a structural setting. We are on track to complete work in the Port area by May 2019 and with that, protection against direct flooding will be in place throughout Newhaven.

3.1.2 Port Access Road (Newhaven) £10.0m

Construction commenced early January, with site clearance works underway. BAM Nuttall has been appointed as contractor Construction is expected to take 19 months to complete.

3.1.3 New England House Growth Centre (Brighton) - £4.9m

Legal & General's planning application for the adjacent Longley Industrial Estate is due to be considered at the council's 20 March Planning Committee. As previously reported, if permission is granted, this will be the key to securing a private sector mixed use redevelopment on Longley that would include a significant element of new employment floor-space (that would count towards City Deal output) and a premium for the council as freeholder towards securing the remainder of the City floor-space output on the New England House site, along with the building's refurbishment.

Further design work has been undertaken in respect of NEH, with financial modelling currently underway on the latest option that has taken on-board a range of planning and transport concerns.

3.1.4 Digital Catapult & 5G Testbed (Brighton) - £1.8m

Since opening the 5G Brighton testbed at the FuseBox in October, we have continued to work with a range of SMEs early-adopters, helping them understand the technical and commercial opportunities that 5G might provide. We have also been preparing an open call to enable a second tranche of businesses to engage, and that open call is now due to launch for applications in late March. We have been working on developing a second user-testing location for the testbed and an announcement around that location is also expected this month. The Immersive Lab has upgraded some of its core facilities, particularly to support businesses who require motion capture technology. We have supported the Uni of Brighton Hive systems change project, have delivered a series of practical workshops for those working in immersive and a series of events (the most recent focussed on the fashion industry) for non-immersive businesses interested in the opportunities this technology might bring. Two of the businesses we have been working with, Gorilla in the Room and Metasonics, have been nominated for the Tech Nation Rising Star award.

3.1.5 Circus Street Innovation Centre & Regeneration (Brighton) - £2.7m

Construction continues to progress, although work on some blocks has recently slipped against the timetable. The student accommodation and residential blocks are at advanced stages, with the student accommodation requiring handover and completion in time for occupation for the academic year commencing this September. The Dance Space has now reached its full height. Offsite infrastructure works have recently commenced.

3.1.6 Preston Barracks Central Research Laboratory (Brighton) - £7.7m

Construction of the CRL building continued in line with the programme, with the structural frame now at an advanced stage. Cladding works are due to commence within the coming months, and in the meantime interior design work and signage proposals continue to be developed. The target completion date for the CRL remains December 2019. Construction of the student blocks on the barracks site commenced in December 2018, completion of which is planned for summer 2020. U+I recently completed a deal with Optivo Housing who will deliver the 369 new homes on the site. Work on the first residential blocks is due to start in mid-2019, and completion of the full development is scheduled for the end of 2022.

3.1.7 Valley Gardens – Phases 1 & 2 (Brighton) - £8.0m

The Valley Gardens Phase 1&2 scheme construction work is progressing with a new footway on the eastern corridor, buildouts on the Morley and Kingswood Street Junctions which will link with the Circus Street developments works. A new and improved drainage system has been implemented and new street lighting will follow. Traffic management arrangements are in place and are consistently being monitored to help reduce any disruptions to the general traffic. The appointed Landscaping Sub-Contractor, East Sussex Landscaping (ELS) is due to commence work shortly to restore and enhance the gardens area. We continue to provide monthly updates on the progress of the scheme which is e-mailed to our circulation list and for those passing the works site you will now see our hoarding panels providing an overview of the project.

3.1.8 Adur Tidal Walls & Western Harbour Arm Flood Defences (Shoreham-By-Sea) – £10.5m

Work on the Adur Tidal Walls flood defences started in 2016 and is now in the final stages. Materials used in the construction include 2,500 steel sheets measuring 26 miles in length, more than 220m reinforced flood glass, 700 metre reinforced concrete walls and 15,000 bricks. Construction teams have worked within a few yards of peoples home to complete the scheme. Some of the project has involved a Giken train, of which only two exist in the western hemisphere; and a floating jack which costs £60,000 a week to hire. The scheme also involved the protection of 800 reptiles (slow worms and lizards) moved from site to Mill Hill and Lancing. The official launch will be in March 2019. Negotiations continue with the Yacht Club to complete the land deal following agreement on Heads of Terms. A planning application has been submitted for the replacement Yacht Club facility which is being considered by Adur District Planning authority,

and a separate planning application for the proposed flood defences along the A259 has been submitted.

Adur District Council has commissioned Mott MacDonald to prepare detailed business case to justify the additional funding from the Environment Agency to support the flood defence wall to be delivered.

3.1.9 A2300 Corridor Improvements (Burgess Hill) - £17.0m

See 3.25 below

LGF Growth Deal Round 3

3.2 In February 2017 Coast to Capital announced that it has secured £66m through Round 3 of the Growth Deal. All six projects put forward by the Board were allocated funding - totalling £48.77m. The project updates are as follows:

Worthing Central Phase 1 (Worthing) - £5.6m

3.2.1 **Teville Gate:**

Mosaic Capital is expected to submit a planning application for their redevelopment shortly.

3.2.2 **Union Place:**

The site has been acquired by Worthing Borough Council using the Worthing Central LGF grant allocation. The Land Pooling Agreement has been in place since September 2018.

The development strategy was approved at JSC 6th November 2018 and the sale and leaseback of site C has taken place.

3.2.3 Decoy Farm (Worthing) - £4.8m

Council LEP application was submitted and presented to the Investment Committee and funding has been agreed.

3.2.4 New Monks Farm & Airport (Shoreham-By-Sea) - £5.7m

Planning permission has been granted for the application submitted for development (600 dwellings, Ikea and new roundabout onto the A27). This will be subject to Secretary of State Call in.

3.2.5 Growth Location (Burgess Hill) - £14.9m

Northern Arc: The statutory consultation period on the planning application (received in December) has now completed, very few responses were received with no surprises. A delivery development partner has been appointed to deliver Freeks Farm and a reserved matters application is anticipated shortly. Work on the first stage of the development (Freeks Farm) remains scheduled to begin in 2020.

Place and Connectivity: West Sussex County Council, as the lead delivery body for the project, is finalising the legal agreement with the Local Enterprise Partnership. The detailed design is underway with construction scheduled to complete in March 2021.

A2300 corridor improvements: The project remains on schedule with construction to complete in March 2021.

Employment space, The Hub: Construction now very close to completion on the first of six phases of development, a 4,000 m² warehouse, with planned handover to DPD in April. The planning application for the second phase of development, to deliver a further 5,000m² of employment space, is being considered by officers.

Digital Infrastructure: A supplier engagement event took place on 17 January for the procurement of the scaffold network. Contract options are now being considered, with procurement to begin in early summer 2019. Discussions are underway with the West Sussex districts and WSCC about a business rates retention pilot scheme to fund a fibre spine for West Sussex. Officers are also in close liaison with the Brighton Digital Exchange about establishing a connection between to the Burgess Hill digital exchange.

One public estate (OPE) 7: At the end of February OPE confirmed that the two bids submitted by the Council in December had been successful. The OPE 7 funding awards will support feasibility studies for: (1) redevelopment of the land adjacent to Burgess Hill station to deliver up to 150 new homes, 500 jobs, and retail opportunities, (2) redevelopment of an extended Brow site in Burgess Hill to provide enhanced accommodation for the emergency services and to create space for 440 new homes.

Goddard's Green Waste Water Treatment works: the funding agreement for the £4m LGF funding has now been signed, with the funding agreement for the £6.5m HIF funding presently being finalised. Detailed design and procurement is work underway with the project delivery and spend ahead of schedule. Construction scheduled to begin in early 2019, with practical completion in December 2019.

3.2.6 Sussex Bio-Innovation Centre (Falmer) - £5.52m

The University is currently engaging with the design team and preferred contractor to determine how we could take forward the revised project. The university have also engaged with external procurement legal advisors in order to ensure they do not transgress any procurement rules/regulations linked to the OJEU process, and avoid potential challenges should they proceed with the preferred contractor.

3.2.7 Black Rock Development (Brighton) - £12.1m

The legal agreement with Aberdeen Standard Investments is now agreed and will be engrossed end of March. The project is moving into the first delivery phase, including appointment of a Project Director and progression of the Enabling Works Package for Black Rock, Eastern site.

LGF Growth Deal Unallocated Funds Rounds 1 & 2 – December 2016 Call

3.3 In December 2016 Coast to Capital announced that it had approximately £46.65m of unallocated funds available to support capital growth projects. The Greater Brighton Board put forward eight bids, five of which received funding totalling approximately £9.9m. The project updates are as follows:

3.3.1 Springman House (Lewes) – £2.0m

The Council completed the purchase of Springman House from the vendors in March 2017. In June 2017 the Council's Cabinet authorised the design and construction of the new blue light facility. In January 2018, architects were appointed to commence work on master-planning and design options.

The architects have undertaken detailed consultation with the blue light end users in order to establish their operational requirements. Work on the site masterplan and building layout options is currently underway and planning consultants have now been instructed to commence preparation of a planning application for the site.

3.3.2 Railway Quay (Newhaven) - £1.5m

Flood defence works on site now completed and negotiations underway with existing tenant re: relocation. Initial masterplan has been prepared and discussions undertaken with potential tenants. However delays have been created by impending closure of adjacent UTC@harbourside . No further decisions will be made until the future of the UTC has been finalised – Government has just established East Sussex College Group as the Preferred Bidder and further negotiations are awaited. The UTC is expected to re-open in September 2019.

3.3.3 Eastside South (Newhaven) - £1.6m

Work on Phase 1 has been completed, with one new occupier (ValetPro) now operational. The second occupier is expected to become operational in early 2019.

Work on Phase 2 commenced in April. Phase 2 is being built according to demand, with the first unit nearing completion.

3.3.4 Heritage Centre Stage – Corn Exchange & Studio Theatre (Brighton) - £3.0m

Since the last update work on site has included continuing remedial works to Corn Exchange roof joists to address significant structural defects; structural works to upper floors and roof 29 New Road; Installation of partition walls and first fix in Studio Theatre; Corn Exchange large window decoration; continuing installation of chiller and heating pipework; installation of steelwork for public lift and back of house staircase continuing; closing up of Studio basement; installation of partition walling in Studio café/kitchen ground floor continuing; installation of underfloor heating and screed in Gallery; M&E first fix completing and commencing second fix

The Contract Administrator has awarded a total of 33 weeks Extension of Time resulting in the new contract Completion date of 12 April 2019. However, the main contractor is reporting works continuing to October 2019.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

4.1 None required.

5. COMMUNITY ENGAGEMENT & CONSULTATION

5.1 None required.

6. CONCLUSION

6.1 The Board is asked to note the contents of this report.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

7.1 There are no direct financial implications associated with this report regarding the progress made in the third quarter of this financial year on approved schemes within the Greater Brighton Investment Programme. Schemes already included within the Greater Brighton Investment Programme have approved business cases in place with funding options identified and these have been reported to their respective bodies. The progress of each scheme is detailed within the Investment plan Update Report in appendix 1. Future or revised business plans will be reported accordingly within the timescales of the project timetables.

*Finance Officer Consulted: Rob Allen, Principal Accountant
Date: 15/03/2019*

Legal Implications:

7.2 There are no legal implications arising directly out of this report.

*Lawyer Consulted: Joanne Dougnaglo, Senior Property Lawyer
Date: 15/03/2019*

Equalities Implications:

7.3 None arising from this report. Equalities issues will be addressed on a project-by-project basis.

Sustainability Implications:

7.4 None arising from this report. Sustainability issues will be addressed on a project-by-project basis.

Any Other Significant Implications:

7.5 None.

SUPPORTING DOCUMENTATION

Appendices:

Greater Brighton Investment Update Report March 2019

Background Documents:

None



Greater Brighton Economic Board

Investment Programme Update Report

26th March 2019

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Highlight Summary



PROJECT	DELIVERY PARTNERS	REPORT HIGHLIGHT
Central Research Laboratory	Brighton & Hove City Council (Delivery Body), U+I Group Plc (Developer) and University of Brighton	The target completion date for the CRL remains December 2019. Construction of the student blocks on the barracks site commenced in December 2018, completion of which is planned for summer 2020. U+I recently completed a deal with Optivo Housing who will deliver the 369 new homes on the site. Work on the first residential blocks is due to start in mid-2019, and completion of the full development is scheduled for the end of 2022.
Digital Catapult	Wired Sussex & University of Brighton, University of Sussex, BHCC, American Express	Since opening the 5G Brighton testbed at the FuseBox in October, we have continued to work with a range of SMEs early-adopters, helping them understand the technical and commercial opportunities that 5G might provide. We have also been preparing an open call to enable a second tranche of businesses to engage, and that open call is now due to launch for applications in late March. We have been working on developing a second user-testing location for the testbed and an announcement around that location is also expected this month.
Newhaven Flood Alleviation Scheme	Environment Agency, Lewes DC, Coast to Capita LEP, SE LEP	January to March 2019 saw progress in the Port area of the scheme but continued frustration concerning the development of a flood barrier over the railway line. The rail flood barrier is required for protection against indirect flooding following storm surge overtopping in the Ouse floodplain. This is being held up due to difficulties reconciling respective institutional requirements on future liabilities. A potential 'backstop' is the approval of an emergency response plan for the 25m gap in flood defences over the railway in the scheme's Area 1, north of Newhaven. There is better news from the Port area of the scheme, where we have pioneered the trial use of cement-free concrete in a short flood wall and this is may be the first use of this innovative low-carbon building material in a structural setting. We are on track to complete work in the Port area by May 2019 and with that, protection against direct flooding will be in place throughout Newhaven.
Waterfront	Brighton and Hove City Council leading the Enabling package of works. The remainder of the project will be led in partnership with Standard Life Aberdeen, who are funding the design and development stage.	The legal agreement with Aberdeen Standard Investments is now agreed and will be engrossed end of March. The project is moving into the first delivery phase, including appointment of a Project Director and progression of the Enabling Works Package for Black Rock, Eastern site.

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Burgess Hill Strategic Growth Programme



Proposed scheme

Aims & Objectives

The programme will deliver transformative change to the town, secure major growth and significant improvements in housing, jobs, infrastructure, and social and community facilities. To support the programme the following funding has been secured:

- £17 million from the Local Growth Fund (LGF) to support A2300 corridor improvements comprising an upgrade to dual carriageway, junction improvements, and the provision of a footway and cycleway linking to the National Cycle Network,
- £10.9 million LGF funding for a Place and Connectivity package of sustainable transport schemes including improvements to the Burgess Hill and Wivelsfield railway stations, public realm improvements, and an inter-urban cycle route,
- £4 million LGF and a further £6.5 million Housing Infrastructure Fund (HIF) to improve the Goddard's Green Waste Water Treatment works, unlocking land to develop a further 256 homes,
- Up to £2.2 million from the Government's Local Full Fibre Network (LFFN) fund to support the implementation of new digital infrastructure for Burgess Hill which in turn will stimulate the market for internet service providers.

Key Facts

Delivery Partners: Mid Sussex District Council, Homes England, West Sussex County Council, Burgess Hill Town Council, Coast to Capital LEP, Department of Transport, Department of International Development, developers (New River, Glenbeigh, Fairfax).

Funding (all years)

Total LGF Funding	£31.9m
OPE Funding	£165k
Total Public Funding	£61.6m
Total Private Funding	£993.3m
Total Funding	£1,054.9m

Following their acquisition of the Northern Arc land parcels, Homes England have confirmed there will be an investment of approximately £162m in strategic infrastructure supporting the development. Further detail on the Homes England investment will be featured in future reports as it becomes available.

Outputs

5,000 new homes, a Science and Technology Park offering up to 100,000 m² of employment space, two further business parks covering 25 hectares, together creating 10,000 new jobs, a major town centre recreational facility offering over 14,500 m² of retail space plus 142 new homes, a 63 bed hotel and cinema, major improvements to the A2300 corridor and a sustainable transport package, two new primary schools and one secondary school, increased capacity at GP practices, new and improved leisure facilities, and full-fibre digital infrastructure.

What happened in the last period?

Northern Arc: The statutory consultation period on the planning application (received in December) has now completed, very few responses were received with no surprises. A delivery development partner has been appointed to deliver Freeks Farm and a reserved matters application is anticipated shortly. Work on the first stage of the development (Freeks Farm) remains scheduled to begin in 2020.

Place and Connectivity: West Sussex County Council, as the lead delivery body for the project, is finalising the legal agreement with the Local Enterprise Partnership. The detailed design is underway with construction scheduled to complete in March 2021.

A2300 corridor improvements: The project remains on schedule with construction to complete in March 2021.

Employment space, The Hub: Construction now very close to completion on the first of six phases of development, a 4,000 m² warehouse, with planned handover to DPD in April. The planning application for the second phase of development, to deliver a further 5,000m² of employment space, is being considered by officers.

Digital Infrastructure: A supplier engagement event took place on 17 January for the procurement of the scaffold network. Contract options are now being considered, with procurement to begin in early summer 2019. Discussions are underway with the West Sussex districts and WSCC about a business rates retention pilot scheme to fund a fibre



spine for West Sussex. Officers are also in close liaison with the Brighton Digital Exchange about establishing a connection between to the Burgess Hill digital exchange.

One public estate (OPE) 7: At the end of February OPE confirmed that the two bids submitted by the Council in December had been successful. The OPE 7 funding awards will support feasibility studies for: (1) redevelopment of the land adjacent to Burgess Hill station to deliver up to 150 new homes, 500 jobs, and retail opportunities, (2) redevelopment of an extended Brow site in Burgess Hill to provide enhanced accommodation for the emergency services and to create space for 440 new homes.

Goddard's Green Waste Water Treatment works: the funding agreement for the £4m LGF funding has now been signed, with the funding agreement for the £6.5m HIF funding presently being finalised. Detailed design and procurement is work underway with the project delivery and spend ahead of schedule. Construction scheduled to begin in early 2019, with practical completion in December 2019.

Central Research Laboratory - Brighton



Proposed scheme

Aims & Objectives

The CRL is a U+I Plc concept, a model they have delivered successfully elsewhere. As a key element of the comprehensive mixed-use redevelopment it will provide a unique, high quality workspace model, tailored to the unique needs of Brighton’s creative and entrepreneurial businesses, particularly those designing and making physical products. It aims to be somewhere inspiring, functional, sustainable and flexible in its design. It is an innovative provision of shared workspaces and facilities that promote collaboration and facilitate serendipity. The shared spaces will range from events spaces to prototyping labs, meeting rooms and cafe/break out spaces, something that will attract both small and larger tenants.

Key Facts

Delivery Partners: Brighton & Hove City Council (Delivery Body), U+I Group Plc (Developer) and University of Brighton (together the partners in the overall mixed-use development across the combined sites).

Funding (all years)

Total LGF Funding	£7.7m
Total Public Funding	£0.00m
Total Private Funding	£7.2m
Total Other Funding	£0.00m
Total Funding	£14.90m

Outputs

Contractual outputs: 4,645sqm of new employment space, 500sqm of high specification prototyping labs/workshops, 107 onsite jobs, £5.427m of match funding.

Non-contractual outputs: 300 other jobs, £250,000 follow-on investment, 99 businesses supported.

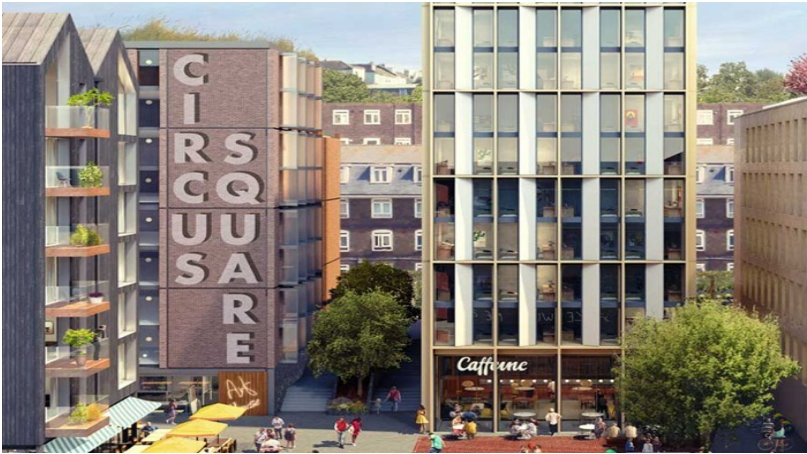
What happened in the last period?

Construction of the CRL building continued in line with the programme, with the structural frame now at an advanced stage. Cladding works are due to commence within the coming months, and in the meantime interior design work and signage proposals continue to be developed. The target completion date for the CRL remains December 2019. Construction of the student blocks on the barracks site commenced in December 2018, completion of which is planned for summer 2020. U+I recently completed a deal with Optivo Housing who will deliver the 369 new homes on the site. Work on the first residential blocks is due to start in mid-2019, and completion of the full development is scheduled for the end of 2022.

Target Milestones

End Date: 13/12/2022.

Circus Street - Brighton



Proposed scheme

Key Facts

Delivery Partners: U+I plc (Cathedral Brighton), Brighton & Hove City Council

Funding (all years)

Total LGF Funding	£2.70m
Total Public Funding	£0.40m
Total Private Funding	£106.57m
Total Other Funding	£0.00m
Total Funding	£109.67m

Outputs

142 new homes; 387 additional jobs and 232 net additional jobs after displacement and substitution; 30,000 sqft office building; 450 student accommodation bed spaces; Cultural building (The Dance Space) for South East Dance (SED); office floor-space providing opportunities for start-ups; retail units and restaurant; public realm to include a public square and landscaped courtyards.

What happened in the last period?

Construction continues to progress, although work on some blocks has recently slipped against the timetable. The student accommodation and residential blocks are at advanced stages, with the student accommodation requiring handover and completion in time for occupation for the academic year commencing this September. The Dance Space has now reached its full height. Offsite infrastructure works have recently commenced.

Target Milestones

End Date: 23/03/2020.

Aims & Objectives

The mix of residential, business, education and cultural occupiers on the site will bring a wide variety of people into the area, benefitting existing local businesses. Economic impact studies indicate that the development will create approximately 232 predominantly local jobs. It will generate £1 million in council tax, new business rates contributions and new homes bonuses. It will encourage student and new resident population spending in and around the site and should boost the local economy by more than £10m each year due to a multiplier effect.

The main office building will provide modern high quality floor-space, of which there is a known shortage in the city.

The Dance Space will house South East Dance and provide them with much-needed production space, a theatre and public space for community participation. The growing artistic community in Brighton has no dedicated space for dance and it is estimated that 60,000 people will use the space every year. It will become a cultural and community hub, where people gather to collaborate, participate, watch and learn.

Decoy Farm - Worthing



Funding (all years)

Total LGF Funding	£4.84m
Total Public Funding	£4.84m
Total Private Funding	£7m
Total Other Funding	TBC
Total Funding	TBC

Outputs

a) Unlocking up to 40,000sqm of employment space for development of mainly B1 and B2/B8 uses; b) Facilitating the redevelopment of a number of key sites within Worthing town centre, as envisioned in the Greater Brighton City Deal; and c) Supporting the development of Shoreham Harbour by providing suitable alternative accommodation to relocate existing harbour businesses.

What happened in the last period?

Council LEP application submitted and presented to Investment Committee and funding has been agreed.

Target Milestones

- Spring 2019** – LEP funding agreement signed
- Autumn 2019** - Planning Application submitted
- End Date:** April 2021

Aims & Objectives

An ambitious plan to upgrade an environmentally challenging but sizable plot of allocated employment land that has stood unused for over three decades. The completed project would boost employment opportunities and economic performance in the entire Coast to Capital LEP region.

Key Facts

Delivery Partners: Worthing Borough Council

130

Digital Catapult - Brighton



Funding (all years)

Total LGF Funding	£0.50m
Total Public Funding	£1.00m
Total Private Funding	£0.50m
Total Other Funding	£0.00m
Total Funding	£2.00m

Outputs 10,000 businesses receiving information about emerging technology opportunities; 1,000 businesses receiving non-financial support; 250 businesses assisted to cooperate with universities and other research institutions; 100 businesses supported to introduce new products or services to the market or the firm; 30 hackathons, boot-camps or pit-stops; and 10 in-depth collaborative R+D projects.

What happened in the last period?

Since opening the 5G Brighton testbed at the FuseBox in October, we have continued to work with a range of SMEs early-adopters, helping them understand the technical and commercial opportunities that 5G might provide. We have also been preparing an open call to enable a second tranche of businesses to engage, and that open call is now due to launch for applications in late March. We have been working on developing a second user-testing location for the testbed and an announcement around that location is also expected this month.

The Immersive Lab has upgraded some of its core facilities, particularly to support businesses who require motion capture technology. We have supported the Uni of Brighton Hive systems change project, have delivered a series of practical workshops for those working in immersive and a series of events (the most recent focussed on the fashion industry) for non-immersive businesses interested in the opportunities this technology might bring. Two of the businesses we have been working with, Gorilla in the Room and Metasonics, have been nominated for the Tech Nation Rising Star award.

Target Milestones **End Date:** March 2020

Aims & Objectives

To enable businesses to develop and exploit new products and services utilising emerging technologies (AA/VR, 5G, AI, etc), in order to improve productivity, develop better employment prospects and increase GVA in the region. The DCCB provides opportunities for start-ups and small businesses to connect with university research knowledge, work with large corporations, access innovation expertise and to engage with two core emerging technology platforms - the Immersive Lab and the 5G testbed. The 5G testbed received additional funding and the initial development and engagement activity is taking place at DCCB, hence the project date extension in 5 above.

Key Facts

Delivery Partners: Wired Sussex & University of Brighton, University of Sussex, BHCC, American Express.

Eastside South - Newhaven



Funding (all years)

Total LGF Funding	£1.60m
Total Public Funding	£0.00m
Total Private Funding	£6.21m
Total Other Funding	£0.00m
Total Funding	£7.81m

Outputs

7,986m2 of new commercial floor-space, together with associated job creation.

What happened in the last period?

Work on Phase 1 has been completed, with one new occupier (ValetPro) now operational. The second occupier is expected to become operational in early 2019.

Work on Phase 2 commenced in April. Phase 2 is being built according to demand, with the first unit nearing completion.

Target Milestones

End Date: Early 2020.

Aims & Objectives

The Newhaven Enterprise Zone (EZ) is a collaboration between Lewes District Council and Coast to Capital LEP that aims to shift the town towards a higher-value economy over the next 25 years. The EZ covers eight key strategic sites (79ha) in a mixture of public and private ownerships, offering a mix of greenfield sites and the opportunity to develop, refurbish and intensify economic activity across a number of brownfield sites formerly used by heavy industry. The focus of the EZ is on growing the emerging 'clean, green and marine' sectors in particular. Over the 25-year lifespan of the EZ, it is estimated that 55,000m2 of new commercial floor-space will be created, 15,000m2 of existing commercial floor-space will be refurbished. This will create / sustain up to 2,000 FTE jobs.

Key Facts

Delivery Partners: Westcott Leach (landowner) in partnership with Lewes District Council & Coast to Capital LEP.

Heritage Centre Stage - Brighton



Funding (all years)

Total LGF Funding	£3.00m
Total Public Funding	£14.24m
Total Private Funding	£5.70m
Total Other Funding	£0.00m
Total Funding	£22.95m

Outputs

Employment: created and/or safeguarded - 337

Businesses assisted: financial and non-financial - 624

New floor space constructed/refurbished: learning - 157m² new floor space constructed/refurbished, Commercial - 2,652m²

Carbon reduction of 39.961 tonnes of CO₂.

What happened in the last period?

Since the last update work on site has included continuing remedial works to Corn Exchange roof joists to address significant structural defects; structural works to upper floors and roof 29 New Road; Installation of partition walls and first fix in Studio Theatre; Corn Exchange large window decoration; continuing installation of chiller and heating pipework; installation of steelwork for public lift and back of house staircase continuing; closing up of Studio basement; installation of partition walling in Studio café/kitchen ground floor continuing; installation of underfloor heating and screed in Gallery; M&E first fix completing and commencing second fix The Contract Administrator has awarded a total of 33 weeks Extension of Time resulting in the new contract Completion date of 12 April 2019. However, the main contractor is reporting works continuing to October 2019.

Target Milestones

End Date: August 2019.

Aims & Objectives

- New Business Model & Commercial Strategy that increases future resilience by improving commercial performance and reducing running costs
- Enhanced contribution to Brighton’s cultural tourism by a strengthened City Centre & Cultural Quarter offer
- Returning the Royal Pavilion Estate to a world class heritage destination & protecting the heritage
- Achieving the long term vision for both organisations
- Evidence-based improved Visitor/ Audience experience, and improved learning, access & participation).

Key Facts

Delivery Partners: Brighton & Hove City Council & Brighton Dome & Brighton Festival

New England House - Brighton



Funding (all years)

Total LGF Funding	n/a
Total Public Funding	£4.9 million (City Deal)
Total Private Funding	n/a
Total Other Funding	n/a
Total Funding	n/a

Outputs

Upgrade building, including providing a net additional 7,090sqm of new employment floor-space.

What happened in the last period?

Legal & General’s planning application for the adjacent Longley Industrial Estate is due to be considered at the council’s 20 March Planning Committee. As previously reported, if permission is granted, this will be the key to securing a private sector mixed use redevelopment on Longley that would include a significant element of new employment floor-space (that would count towards City Deal output) and a premium for the council as freeholder towards securing the remainder of the City floor-space output on the New England House site, along with the building's refurbishment.

Further design work has been undertaken in respect of NEH, with financial modelling currently underway on the latest option that has taken on-board a range of planning and transport concerns.

Target Milestones

End Date: 31/03/2022.

Aims & Objectives

Upgrade and expand New England House so that it becomes a credible and highly visible hub for greater Brighton's creative high-tech businesses.

Key Facts

Delivery Partners: Brighton & Hove City Council

134

New Monks Farm - Shoreham-By-Sea



Funding (all years)

Total LGF Funding	£5.70m
Total Public Funding	£5.7m
Total Private Funding	£144m
Total Funding	£150m

Outputs

- A £150 million capital investment;
- The delivery of 600 new homes, 30% of which will be affordable;
- 876 gross new jobs;
- £2.8m in public sector receipts from council tax revenues, new homes bonus and new business rates; and £11.5m additional annual GVA to the Adur economy

What happened in the last period?

Planning permission granted for application submitted for development (600 dwellings, Ikea and new roundabout onto the A27). Subject to Secretary of State Call in.

Target Milestones

- Commence On Site:** Spring 2019
- Delivery of New Junction to the A27:** December 2021
- Completion of Development:** December 2025
- End Date:** December 2025.

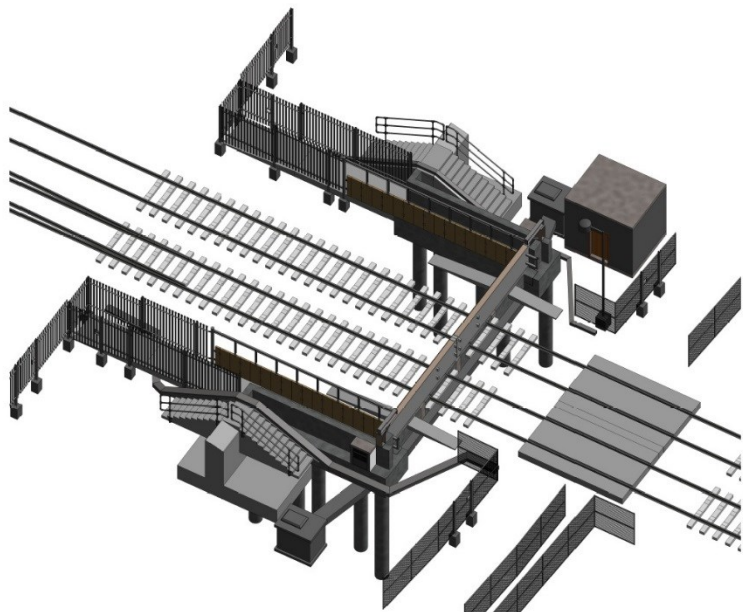
Aims & Objectives

The project is to develop a strategic employment and housing growth centre in Shoreham. Its main components are: (a) The provision of a new and improved signalised 6-arm junction on the A27 which will unlock housing and employment space by allowing access to and from the wider area and the specific development sites; (b) The building of 600 new homes and 10,000m2 employment floor-space at New Monks Farm.

Key Facts

Delivery Partners: New Monks Farm Development Ltd, Highways England, West Sussex County Council and Adur District Council.

Newhaven Flood Alleviation Scheme



Funding (all years)

Total LGF Funding	£3.00m
Total Public Funding	£14.50m
Total Private Funding	£0.00m
Total Other Funding	£0.00m
Total Funding	£17.50m

Outputs

3km of flood defences on the east and west banks of the Ouse, comprising concrete walls, earth embankments, sheet steel piles, flood gates.

What happened in the last period?

January to March 2019 saw progress in the Port area of the scheme but continued frustration concerning the development of a flood barrier over the railway line. The rail flood barrier is required for protection against indirect flooding following storm surge overtopping in the Ouse floodplain. This is being held up due to difficulties reconciling respective institutional requirements on future liabilities. A potential ‘backstop’ is the approval of an emergency response plan for the 25m gap in flood defences over the railway in the scheme’s Area 1, north of Newhaven. There is better news from the Port area of the scheme, where we have pioneered the trial use of cement-free concrete in a short flood wall and this is may be the first use of this innovative low-carbon building material in a structural setting. We are on track to complete work in the Port area by May 2019 and with that, protection against direct flooding will be in place throughout Newhaven.

Target Milestones

End Date: November 2019.

Aims & Objectives

Build physical infrastructure to provide protection from tidal flooding up to a 1 in 200 year event for 431 homes, 390 businesses, rail and road infrastructure and in addition facilitate development under the auspices of the new Newhaven Enterprise Zone

Key Facts

Delivery Partners: Environment Agency, Lewes DC, Coast to Capita LEP, SE LEP.

Port Access Road - Newhaven



Funding (all years)

Total LGF Funding	£10.00m
Total Public Funding	£13.27m
Total Private Funding	£0.00m
Total Other Funding	£0.00m
Total Funding	£23.27m

Outputs

Construction of the Newhaven Port Access Road from the Pargut roundabout to the Port roundabout, unlocking new employment land at East Quay within Newhaven Port.

What happened in the last period?

Construction commenced early January, with site clearance works underway. BAM Nuttall has been appointed as contractor Construction is expected to take 19 months to complete.

Target Milestones

End Date: Mid 2020.

Aims & Objectives

Construction of a new road into Newhaven Port that will unlock significant new land to meet the economic needs of Newhaven through expansion of Port-related activities.

Comprising approx. 650m of new road, including a new 3 span bridge over the Newhaven to Seaford railway line and Mill Creek, and associated landscaping/environmental works.

Key Facts

Delivery Partners: East Sussex County Council.

137

Railway Quay - Newhaven



Funding (all years)

Total LGF Funding	£1.5m
Total Public Funding	£0.01m
Total Private Funding	TBC
Total Other Funding	TBC
Total Funding	£1.51m

Outputs

New commercial floor-space, job creation and land remediation. Details currently being finalised.

What happened in the last period?

Flood defence works on site now completed and negotiations underway with existing tenant re: relocation. Initial masterplan has been prepared and discussions undertaken with potential tenants. However delays have been created by impending closure of adjacent UTC@harbourside. No further decisions will be made until the future of the UTC has been finalised – Government has just established East Sussex College Group as the Preferred Bidder and further negotiations are awaited. The UTC is expected to re-open in September 2019.

Target Milestones

End Date: TBC.

Aims & Objectives

The Newhaven Enterprise Zone (EZ) is a collaboration between Lewes District Council and Coast to Capital LEP that aims to shift the town towards a higher-value economy over the next 25 years. The EZ covers eight key strategic sites (79ha) in a mixture of public and private ownerships, offering a mix of greenfield sites and the opportunity to develop, refurbish and intensify economic activity across a number of brownfield sites formerly used by heavy industry. The focus of the EZ is on growing the emerging 'clean, green and marine' sectors in particular. Over the 25-year lifespan of the EZ, it is estimated that 55,000m² of new commercial floor-space will be created and 15,000m² of existing commercial floor-space will be refurbished. This will create / sustain up to 2,000 FTE jobs.

Key Facts

Delivery Partners: Lewes District Council.

Springman House - Lewes



Funding (all years)

Total LGF Funding	£2.00m
Total Public Funding	£4.34m
Total Private Funding	£0.00m
Total Other Funding	£0.00m
Total Funding	£6.34m

Outputs

By enabling the development of a new multi blue light facility on the site of Springman House, this project will unlock the £180m North Street Quarter scheme - a major, strategic mixed-use development in Lewes. Relocating the Community Fire Station from its existing premises on North Street, Lewes will: enable the delivery of 416 new homes and 13,000m² of commercial floor-space, through the £180 million North Street Quarter (NSQ) regeneration scheme, and enable Lewes' "blue light" services to be co-located.

What happened in the last period?

The Council completed the purchase of Springman House from the vendors in March 2017. In June 2017 the Council's Cabinet authorised the design and construction of the new blue light facility. In January 2018, architects were appointed to commence work on master-planning and design options. The architects have undertaken detailed consultation with the blue light end users in order to establish their operational requirements. Work on the site masterplan and building layout options is currently underway and planning consultants have now been instructed to commence preparation of a planning application for the site.

Target Milestones

End Date: Anticipated 2021, subject to Planning.

Aims & Objectives

The project involves the formation of new fire and ambulance station facilities with close adjacencies and shared facilities with the existing police station.

The proposed site is tight in terms of space and will contain a fully operational police station throughout the construction duration. The site will likely also house a commercial development to aid viability.

Key Facts

Delivery Partners: Lewes District Council are the lead delivery body in partnership with East Sussex Fire & Rescue Service, Sussex Police and the South East Coast Ambulance Service.

Sussex Bio Innovation Centre - Falmer



Proposed scheme

Aims & Objectives

The Sussex Bio-Innovation Centre will provide a much-needed new facility for entrepreneurs and businesses in the Coast to Capital region’s developing Life Sciences sector providing an enabling infrastructure to test new ideas, share expertise and develop new commercial products within a first class university setting. The Centre will be a key element of Life Sciences development at the university, providing a research and development interface between academia and business to foster the next generation of pharma and biotech companies.

Key Facts

Delivery Partners: University of Sussex.

Funding (all years)

Total LGF Funding	£5.52m
Total Public Funding	£0.00m
Total Private Funding	£81.99m
Total Other Funding	£0.00m
Total Funding	£87.51m

Output

Local Growth Funding will deliver; 2,202sqm of dedicated specialist accommodation Support for 20 new life sciences business teams at a time, Over 60 specialist bio-science graduate-level jobs plus additional senior business staff, A further 20 specialist bio-science technician, business support and management positions.

What happened in the last period?

The University took a decision to stop the current New Life Sciences build project, and not pursue the design which provided accommodation and facilities for all practical teaching and research activities undertaken by the School of Life Sciences along with a Bio Innovation Centre. The revised project will look to design and build a research only facility for the School of Life Sciences but also incorporating a Bio innovation Centre. The University is currently engaging with the design team and preferred contractor to determine how we could take forward the revised project. We have also engaged with external procurement legal advisors in order to ensure we do not transgress any procurement rules/regulations linked to the OJEU process, and avoid potential challenges should we proceed with the preferred contractor.

Target Milestones

End Date: 2020/21.

Teville Gate - Worthing



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Aims & Objectives

Teville Gate (TG) forms part of the Worthing Central Programme (Phase 1) to transform key brownfield sites in Worthing town centre. This project will facilitate the redevelopment of the site by undertaking site preparation works, consisting of the demolition of all buildings within the redline and provision of a temporary surface car park. Thereafter the Council will continue to support the freeholder, Mosaic Global Investments (Mosaic) to submit a viable planning application in order to deliver the scheme.

Key Facts

Delivery Partners: Worthing Borough Council and Mosaic Global Investments.

Funding (all years)

Total LGF Funding	£2.09m
Total Public Funding	£0.01m
Total Private Funding	£78.90m
Total Other Funding	£0.00m
Total Funding	£81.00m

Outputs

Following the demolition of all buildings this 1.4 ha site has the potential to deliver (a) 375 new homes (b) 3,410sqm of commercial floor-space (restaurants, cafes and on-site gym) (c) 6,740sqm of retail floor-space (state of the art supermarket) (d) 493 gross jobs (net jobs 314) (e) Modern car parking infrastructure (over 160 spaces for residents and visitor use) (f) New public realm (approx. 4,000sqm, creating an improved public corridor from Worthing station to the town centre).

What happened in the last period?

Mosaic Capital is expected to submit a planning application for their redevelopment shortly.

Target Milestones

Winter 2018/19: Planning application to be submitted

Spring 2019: Temporary surface car park completed

End Date: Mar 2021.

Union Place - Worthing



Funding (all years)

Total LGF Funding	£3.60m
Total Public Funding	£5m
Total Private Funding	£40m
Total Other Funding	TBC
Total Funding	£45m

Outputs

A business case has been approved by the LEP which identifies the potential to deliver: (a) 179 new homes (b) 26,800 sqm of commercial floors-pace (c) 2,011sqm of leisure floor-space (cinema) (d) Hotel - 66 rooms (e) 164 gross jobs (net jobs 89) (f) Modern parking infrastructure (up to 220 residential spaces) (g) New public realm (approx. 900 sqm).

A joint development strategy with LCR was agreed at JSC on 6th November 2018 which sets out a preferred mixed use delivery route.

What happened in the last period?

The site has been acquired by Worthing Borough Council using the Worthing Central LGF grant allocation.

Land Pooling Agreement in place September 2018.

Development strategy approved at JSC 6th November 2018.

Sale and leaseback of site C has taken place

Target Milestones

End Date: Mar 2021.

Development Strategy: October 2018 JSC Committee

Further timescales will dep end on the Development Strategy

End Date: Mar 2021

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Aims & Objectives

Union Place (UP) forms part of the Worthing Central Programme (Phase 1) to regenerate key brownfield sites in Worthing town centre. The Council has agreed to enter into a land pooling agreement for the site with partners London and Continental Railways. The partners have prepared a development strategy for the sites which has been approved at JSC. The development strategy could include building out ourselves (direct delivery) or gaining planning consent and selling to a developer.

Key Facts

Delivery Partners: Worthing Borough Council, London & Continental Railways, Coast to Capital LEP.

Valley Gardens - Brighton



Proposed scheme

Aims & Objectives

Simplification of traffic network, provision of 'public transport corridor' to the west with general traffic on the western corridor. Enhanced public realm, gardens and materials throughout. The scheme aims to contribute to improved air quality, safety, connectivity, improve efficiency and upgrade signals at junctions. Reduce street clutter and provide enhanced greenspace for public enjoyment.

Key Facts

Delivery Partners: C2C Local Enterprise Partnership

Funding (all years)

Total LGF Funding	£8.00m
Total Public Funding	£1.71m
Total Private Funding	£0.41m
Total Other Funding	£0.00m
Total Funding	£10.13m

Outputs

Match Funding (BHCC) £1.712m, Local Funding £0.414, Total resurfaced roads - 1,588m, Total length of cycle ways - 670m, Area of land experiencing flooding - 63,866 sqm.

What happened in the last period?

The Valley Gardens Phase 1&2 scheme construction work is progressing with a new footway on the eastern corridor, buildouts on the Morley and Kingswood Street Junctions which will link with the Circus Street developments works. A new and improved drainage system has been implemented and new street lighting will follow. Traffic management arrangements are in place and are consistently being monitored to help reduce any disruptions to the general traffic. The appointed Landscaping Sub-Contractor, East Sussex Landscaping (ELS) is due to commence work shortly to restore and enhance the gardens area.

We continue to provide monthly updates on the progress of the scheme which is e-mailed to our circulation list and for those passing the works site you will now see our hoarding panels providing an overview of the project.

Target Milestones

End Date: 2020/2021.

Waterfront - Brighton



Aims & Objectives

Firstly, to deliver a brand new 10,000 seater dual purpose conference and events venue at the vacant Black Rock site on Brighton seafront as part of a two site solution, labelled the "Brighton Waterfront" regeneration project. Secondly, the regeneration of a key strategic central city site to provide a new regional shopping destination for the city, in line with the approved City plan, utilising the newly vacated Brighton Conference centre site on Brighton's seafront. To ensure that the above timescale is met, the council will be proceeding with a package of works to de-risk and prepare the Black Rock site for the new venue which will utilise LEP funds as part of an "Early Works Package", the remainder of funding being allocated towards the construction of the new venue starting in 2021.

Key Facts

Delivery Partners: Brighton and Hove City Council will be leading the Enabling package of works. The remainder of the project will be led in partnership with Standard Life Aberdeen, who are funding the design and development stage.

Funding (all years)

Total LGF Funding	£12.11m
Total Public Funding	£120.60m
Total Private Funding	£0.00m
Total Other Funding	£0.00m
Total Funding	£132.71m

Outputs

Jobs directly connected to intervention - 1,832, Commercial floor space constructed - 27,800, Safeguarded jobs - 518, Commercial floor space refurbished - 53,383sqm. All outputs remain estimates as the project design and development stage has not completed at the time of the C2C LEP submission.

What happened in the last period?

The legal agreement with Aberdeen Standard Investments is now agreed and will be engrossed end of March. The project is moving into the first delivery phase, including appointment of a Project Director and progression of the Enabling Works Package for Black Rock, Eastern site.

Target Milestones

End Date: 18/12/23.

Western Harbour Arm – Shoreham-By-Sea



Proposed scheme

Aims & Objectives

A sum of £3.5 million was identified for flood defences to unlock developments on Shoreham’s Western Harbour Arm. This project will deliver a flood risk management scheme at Sussex Yacht Club on the Western Harbour Arm. The site is adjacent to the historic harbour town of Shoreham-by- Sea, West Sussex, and thus this scheme will safeguard existing town centre businesses as well as provide an unrestricted flow of traffic on the A259.

Key Facts

Delivery Partners: Adur District Council, Environment Agency and Sussex Yacht Club, Shoreham Harbour Partnership.

Funding (all years)

Total LGF Funding:	£3.50m
Environment Agency Funding:	£1.14m (up to)
Total Funding:	£4.64m (up to)

Outputs

The project is for the construction of a flood wall to the rear of the existing line of defence; protecting the A259 and communities behind but allowing some riverside inundation during flood events on the Sussex Yacht Club site. The proposed location of the setback flood wall would largely be along the rear (northern) side of the site adjacent to the A259. Based on the Environment Agency’s Design Guidance a reinforced concrete core and foundation wall is considered to be the most technically viable solution.

What happened in the last period?

Negotiations continue with the Yacht Club to complete the land deal following agreement on Heads of Terms. A planning application has been submitted for the replacement Yacht Club facility which is being considered by Adur District Planning authority, and a separate planning application for the proposed flood defences along the A259 has been submitted.

Adur District Council has commissioned Mott MacDonald to prepare detailed business case to justify the additional funding from the Environment Agency to support the flood defence wall to be delivered.

Target Milestones

End Date: Mar 2021.

September 2020 Completion of ADC’s flood prevention works.

