



Greater Brighton Economic Board

Annual Report 2021/22

April 2022

Greater Brighton Economic Board Members

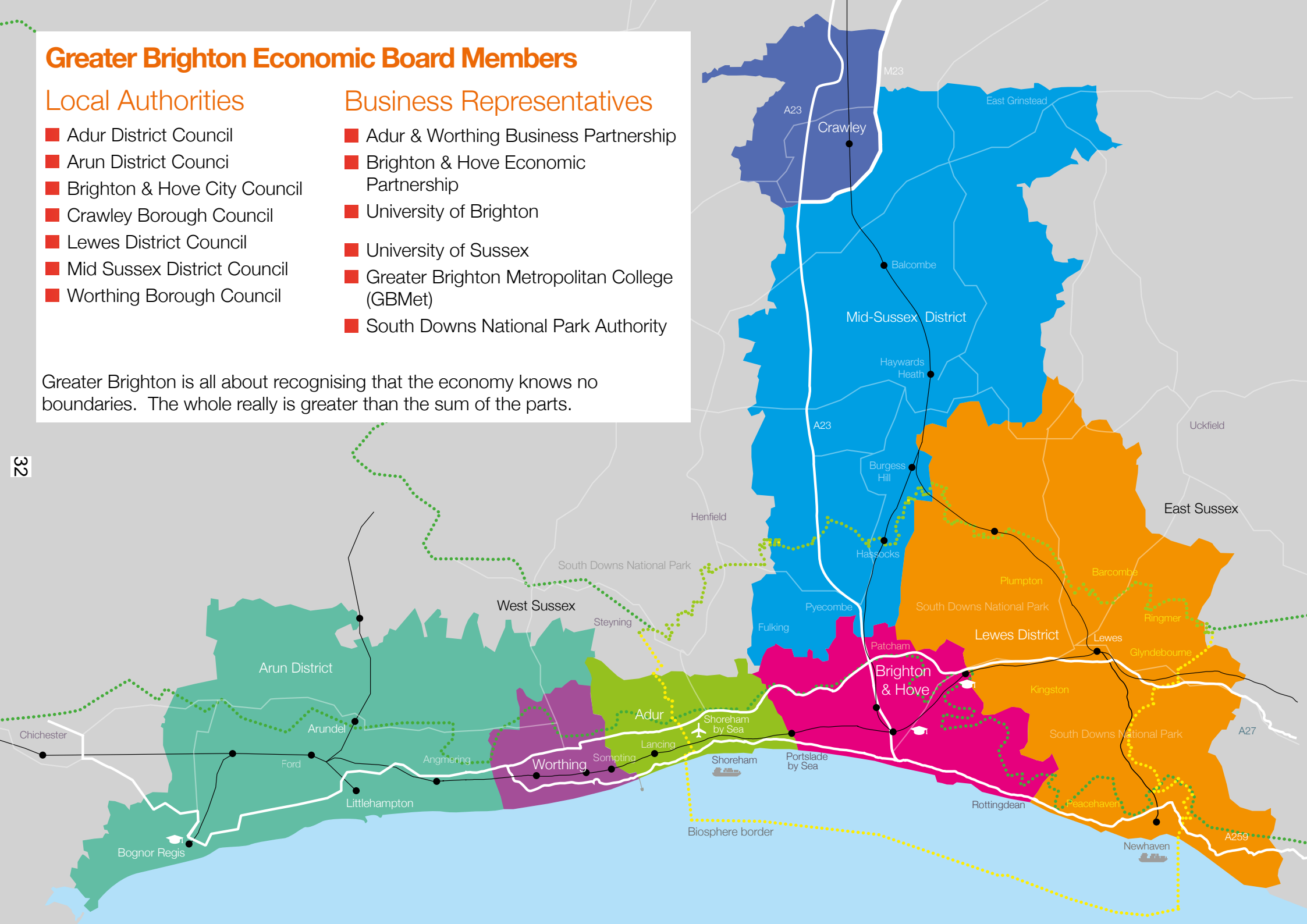
Local Authorities

- Adur District Council
- Arun District Council
- Brighton & Hove City Council
- Crawley Borough Council
- Lewes District Council
- Mid Sussex District Council
- Worthing Borough Council

Business Representatives

- Adur & Worthing Business Partnership
- Brighton & Hove Economic Partnership
- University of Brighton
- University of Sussex
- Greater Brighton Metropolitan College (GBMet)
- South Downs National Park Authority

Greater Brighton is all about recognising that the economy knows no boundaries. The whole really is greater than the sum of the parts.



Reigniting economic growth

Greater Brighton Response

In April 2020 it became clear that COVID-19 presented a global health and economic challenge the likes of which we had never experienced. The economic impact on the City Region would be significant. Two Impact Assessment Reports were commissioned to help us understand the economic, social and health impacts of COVID-19 to the Greater Brighton region. Once the impact was understood informed decisions could be made around economic recovery. The original report was published in the summer of 2020, and following the second period of lockdown at the end of 2020 and into spring of 2021, a revised report was produced in October 2021.

The key findings from the second report were that;

- Creative, Arts and Digital has been badly hit and will take time to recover
- Businesses linked to the Aviation sector continue to be hit whereas the logistics sector has experienced significant growth
- Retail and high streets were impacted during lockdowns but the independent retail sector is now growing
- Tourism and culture were impeded by lockdowns but rallied over the summer months
- Financial services and professional services sectors did well during the pandemic
- Agriculture and viticulture were impacted by restrictions on events and hospitality
- Manufacturing was impacted unevenly with some sub-sectors thriving and others being severely impacted

Towards a Post-COVID Economy

The recovery reports set out a number of themes that are expected to drive the reshaping of the UK economy over the coming years. Successful places will develop place-specific policies and activities that build on the momentum of these national trends. The key opportunities for Greater Brighton include;

- Accelerating opportunities to transition to low carbon through infrastructure investment
- Prioritising locally-sourced food supply chains to tackle food miles and support local agriculture and viticulture
- The permanent shift to remote and hybrid working for some professions
- New consumer behaviours (e.g. online shopping) will stay and drive a repurposing of high streets and town centres
- Growth of domestic staycation market as families consider the environmental and financial costs of overseas travel
- Accelerating digital health with emphasis on proactive diagnostics for direct use by consumers
- Accelerating opportunities to invest in low carbon businesses

With these expected trends in mind, Greater Brighton has an action plan to make appropriate interventions that will catalyse growth in a post-COVID economy. Examples of some of this work will be highlighted throughout this report.

Business leading the way

Greater Brighton is home to businesses of regional, national and global significance. Many businesses, large and small, from across the region, have learned quickly to adapt to the backdrop of COVID-19, exploit the opportunity and have been able to thrive through the pandemic. Furthermore, the pandemic hasn't dampened the strong appetite for entrepreneurs wanting to set up their own businesses in Greater Brighton, and some great new businesses have launched over the last 24 months.

Roche Diagnostics

Roche Diagnostics has been a key part of the healthcare industry's unprecedented response to COVID-19.

Since the onset of the pandemic in March 2020, the firm, which has a UK base in Burgess Hill, has been providing the UK with a number of different tests including the PCR and lateral flow tests that we are now very familiar with. It usually takes a minimum of two years to develop a diagnostic test, and get it approved and regulated before it is distributed across the health system. But in less than a month the Roche team analysed the genetic sequence of the virus that causes COVID-19, created a diagnostic test and secured validation.



Curated Grey

Starting a business is never easy, but one Brighton resident has shown it can be done from the comfort of your own home – even in a pandemic.

During the first National lockdown Melanie Carter developed the idea for Curated Grey, an online mini department store selling homeware, jewellery, women's accessories and children's clothing.

Having gained 11,000 Instagram followers in less than a year and operating from home, the business is now making a name for itself, largely down to the fact the online shopping industry is performing better than ever.

Having started out as a Buyer for various High Street retailers, Melanie has used the skills she gained – searching for and building relationships with global manufacturers and suppliers – to set up her business, which she runs with help from family and friends.

Although physical retailers are facing hardship at the moment the business owner hopes that one day, she will be able to open her own shop in Brighton, and that her brand can sit alongside the likes of Zara Home and H+M.



Business leading the way

The Real Pie Company

With restaurants closing in March 2020 as part of the national COVID-19 lockdown, many Greater Brighton businesses worked tirelessly to bring top-quality food to people's doors.

The Real Pie Company in Crawley was one of those companies stepping into the breach, its kitchen dealing with a surge in demand for its pies over the course of the lockdown.

The family-run business started life in 1999 in a Sussex butcher's shop, eventually moving into its Crawley kitchen where it ships handmade pies bound for London and towns across the south.

Just weeks before the first COVID-19 lockdown began, 14 of the company's pies were commended by the British Pie Awards, including a gold medal for its steak, mushroom and stilton pie.

So naturally The Real Pie Company's online delivery service was very popular as restrictions kept people at home.

Yet the COVID-19 pandemic has brought the firm closer to its roots than ever. In November 2020 it opened a shop in the Sussex village of Cowfold, its first retail outlet since the company closed its Crawley shop to expand its pie production.



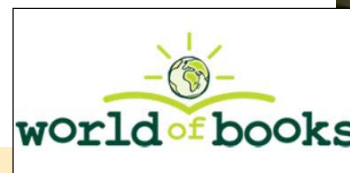
World of Books

World of Books Group, based near Worthing, was founded in 2008 with an ethos to do good, to help charities and protect the planet. As a certified B-Corporation, it meets the highest standard of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose. Using business as a force for good is at the very heart of the company's operations – and since the start of the pandemic, this commitment has never been more important.

In March 2020 the company donated 70,000 books to schools across the United Kingdom. An initiative in their Big Book Giveaway drive, it formed part of their commitment to donate 1 million books to good causes by the end of 2021.

In the midst of lockdown, the company also launched an innovative new partnership with Virgin Money Giving, giving customers an alternative and unique way to donate to good causes. Through the integration of technologies between Virgin Money Giving and Ziffit, World of Books Group's free trade-in app, the value of customers' unwanted books, CDs, games and DVDs could be donated to a charity of their choice. It has so far raised thousands for good causes.

As the NHS tackled an urgent need for PPE during the first lockdown, World of Books Group utilised the capacity within their extensive logistics and transport network to deliver vital PPE to NHS hospitals and care homes, supporting those risking their lives on the front line of our health services.



Blazing the trail to net zero

Greater Brighton Climate Summit

The 12 October 2021 saw the Greater Brighton Climate Summit. The half-day conference attracted an online audience of around 200 including climate change experts, government officials, local environment groups and members of the public.

They were told that without action on carbon emissions, temperatures were likely to continue to rise in Greater Brighton. Winter rainfall would increase on average by 25% with a corresponding summer decline, dramatically affecting the environment.

Figures show that the people in the region averaged around 8,000 kilograms of carbon dioxide emission per person per year. This needed to drop drastically to around 3,000 to counter the effects of climate change.

Despite the challenges ahead, the conference heard that actions were already being taken that demonstrate how Greater Brighton is a flagship city region leading the fight against climate change. Among the initiatives outlined were:

- Plans to create a Sussex Bay marine park restoring the kelp forest off the coast which captures carbon up to 100 times more effectively than trees
- Plans were developing to create a green hydrogen fuel hub at Shoreham Port using wind and wave power and cutting-edge technological work was underway at engineering company Ricardo creating carbon-free engines for the future
- Work ongoing to transform Brighton & Hove bus fleet from diesel to clean electric and hydrogen fuel. A similar initiative is taking place with Metrobus in Crawley
- Ground breaking co-operation between the Universities of Brighton and Sussex to create an Innovation Centre for climate change technologies

- Work underway to create a Greater Brighton investment platform to attract support for new technologies, creating new jobs and opportunities

With the political leaders and other partners working with clear and collective aspirations, there is a fighting chance to solve climate crisis for the benefit of Greater Brighton communities now and for future generations. Significant investment is needed to unlock powers and take the action that is so urgently needed, and the Board has called on Government to accelerate the pace and scale of change.

A full recording of the conference can be accessed [here](#)



Blazing the trail to net zero

In the autumn of 2020 the Board agreed and launched its GB10 environmental pledges. These pledges promise to use our combined authority, lobbying power, expertise and knowledge to becoming a carbon neutral region, through championing a major programme of projects on environmental action and clean growth. The Greater Brighton city region pledges to help tackle the climate change crisis and place itself at the centre of partnership efforts to effect real change. Link to 10 pledges video – [here](#).

The agreement on the GB10 pledges followed after agreeing ambitious energy and water plans for the Greater Brighton region.

The Greater Brighton Energy Plan has over 30 investible energy projects under way. These projects will reduce energy demand, cut carbon emissions, and bring community benefits, and also contribute to a resilient energy system for the future. Some projects innovate with novel technologies and new ways of integrating energy systems, other projects seek to scale up and coordinate well-known interventions.

The Greater Brighton region is one of the most water-stressed in the UK, and the Greater Brighton Water Plan sets ambitious targets to reduce water consumption. Important now, but absolutely critical against the backdrop of climate change and the expected population changes by 2050.

GB10 Pledges

The Board's commitment to transitioning to a net zero carbon region has helped to drive solid progress on:

- The Sussex Kelp Restoration Project and development of the Sussex Bay initiative to restore nature and enhance the potential of marine and coastal environments to deliver carbon sequestration, biodiversity and other public benefits.
- Joint working on high-profile infrastructure including Hydrogen Sussex and the Housing Retrofit Task Force
- Members in an improved position to bid for national funding on public sector decarbonisation
- Delivery of the first school raingarden (in progress) at Moulsecoomb Primary school through The Aquifer Partnership's 'Rainscape Campaign'.
- South Downs National Park Authority launching 'ReNature' nature recovery campaign.
- Adaptive work by water companies to deliver water efficiency messages during Covid when home visits were not possible.
- Lobbying to enable and facilitate the environmental pledges



Blazing the trail to net zero

Hydrogen Sussex

Hydrogen Sussex, born out of the Greater Brighton Energy Plan, is the body supporting and facilitating the hydrogen economy across Sussex. A successful launch event was held in February 2021 with well over 200 attendees including government ministers and a diverse range of stakeholders from across the private and public sectors.

A UK Hydrogen Strategy was published in October 2021, together with notice of a Net Zero Hydrogen Fund for 2022, as part of a raft of decarbonisation strategies culminating in the government's Net Zero Strategy in November 2021. Hydrogen will have a critical role in the UK's net zero energy future.

The UK Hydrogen Strategy highlights the potential of public sector funding to leverage private investment in innovation, to unlock commercialisation and create a market for hydrogen. The ambition to produce 5 GigaWatts of hydrogen by 2030 would mean the creation of a thriving new hydrogen industry, which could support over 9,000 high-quality jobs and £900 million of GVA. Government investment in hydrogen to de-risk early projects, could unlock over £4 billion of private sector co-investment by 2030.

Moving quickly to develop a strong UK hydrogen economy by 2030 presents opportunities for investment in projects and associated infrastructure and supply chain companies. With such a critical role to play in enabling the UK hydrogen economy, it is important that a joined up and strategic approach is taken to hydrogen Research and Innovation investment.



Blazing the trail to net zero

Hydrogen Sussex

The UK Hydrogen Strategy highlights the need for these to be in place by 2025:

- **Sector development:** sector & government develop supply chains & skills base
- **Consumer Awareness:** regional stakeholders and community priorities understood
- **Private investment:** strategic partnerships with key organisations in place, financial sector engaged, private investment / capital in place
- **R&D:** programmes in place coordinating effort and supply chain development
- **Industry development & deployment:** industry led tech development and testing across value chain, consumers engaged

With Hydrogen Sussex, the Greater Brighton Region is very much on the front-foot. Hydrogen Sussex had already built a significant network of key stakeholders across local and central government and the private sector, and has been engaging other stakeholders including regional MPs to enhance support and understanding of the region's hydrogen ambitions.

This all puts the region very much at the forefront of a hydrogen fuel revolution. However, to ensure the potential of this opportunity is maximised there is a need to develop an investment proposition and strategy for the City Region. The aim of the investment proposition would be to give a clear focus and direction, establish a place-based perspective, and ensure that research and innovation is embedded in all hydrogen projects. The investment proposition is complementary to and gives a supporting framework for individual projects to proceed, mapping to a variety of funding sources and focusing on research excellence and delivery at commercial pace.

Without an investment proposition and strategy, Greater Brighton will be at a significant disadvantage in bringing in significant investment for hydrogen, in comparison to neighbouring regions. To that end the Board has invested £25,000 to support development and delivery of the proposition and strategy, and this work will be carried out through 2022.



Nurturing economic growth

Upgrading our Infrastructure

In January 2020, the Board approved an ambitious Digital Action Plan for Greater Brighton which identified that the digital arena cuts across 11 thematic areas including, Business, the Internet of Things, Retail, Visitors and Transport.

The impact of Covid-19 on the way we work, buy things and access services has accelerated the demand for next-generation internet speeds and digital services. In 2021 the Digital Action Plan was reviewed and refreshed in light of the Covid pandemic, and the exciting and essential work will continue at pace through 2022.

The pandemic has also highlighted the disparity between those individuals and businesses that have the means and skills to access new services and use new technologies and those that can't, either because they don't have the means, and/or the necessary skills. To that end, the Board is supporting a digital inclusion study, which will identify what the key challenges and issues are around digital inclusion.

The Greater Brighton Economic Board is committed to public transport as being an efficient and environmentally friendly way of residents moving around the City Region and beyond. The Board will continue support public transport providers to encourage users onto public transport.

The priority corridors for the region remain Brighton Mainline, M23/A23, A27, A259 and A26. Greater Brighton is represented on the Transport for the South East (TfSE) South Central Radial Area Study Forum, which is an opportunity to make clear to TfSE and other regional stakeholders the challenges, priorities and opportunities for transport within the Greater Brighton region.

Upgrading our Infrastructure

The Greater Brighton One Public Estate Programme was established in 2016, following Government launching the national programme a few years earlier. The Programme provides funding to support and enable local authorities to deliver public property and land initiatives with the main aim being to get more from the collective public sector estate. This includes unlocking surplus sites for new housing and jobs, enabling more joined-up public services for local communities, or creating further opportunities for local authorities and public sector partners to reduce running costs and generate income to deliver savings for the taxpayer.

Since 2016, just over £6m has been awarded to the Greater Brighton programme to support a portfolio of 32 projects. These projects will help to make the best use of the City Region's limited land supply to help build the economic, social, and environmental resilience of the region, including supporting progress on the GB10 Environmental Pledges.



A great year ahead

City Region Blue-Green Investment Plan

As mentioned previously in this report, with the Energy and Water Plans, GB 10 Pledges and Hydrogen Sussex, the Greater Brighton region is in a position to become an exemplar in sustainable, green growth.

In July 2021 the Board agreed to the development of a net-zero innovation-led Investment Plan. This Blue/Green Investment Plan will be the product of an ambitious collaboration between the public and private sector. Its main purpose will be to outline the region's investment requirements to become a leader in the UK's green industrial revolution and transition to net zero.

The document would also serve to showcase the Greater Brighton region as a home to pioneering businesses, new technologies and green innovation as we make progress to net zero emissions, laying the foundations for economic growth in a way that creates thousands of jobs. This will in turn make the case for attracting investment in the region. This Blue/Green Investment Plan would take the form of a 'pitch document' that would be owned by the city region as a whole, and form the basis of future negotiations with government about the areas that government could leverage national benefits by investing in Greater Brighton.

In July 2021 the Board agreed to contribute a significant sum to support development of the Plan and to stimulate private sector investment, and this work will continue through 2022 and into 2023.

Food for Thought

As demonstrated throughout this report, building economic, environmental, and social resilience is a strategic priority for the Board and is captured within the GB10 Environmental Pledges. Food fits within this area of focus.

The UK food and drink sector is valued at more than £100 billion and the food industry is the largest manufacturing sector in the country, employing 4 million people and generating around £121 billion annually. The Coast to Capital LEP geography is one of the largest horticulture areas in the UK, employing upwards of 9,000 FTE jobs providing in excess of £1 billion of production.

Food system vulnerabilities have been revealed through the Covid-19 pandemic. Opportunities now exist to rebuild local supply chains and infrastructure.

There are further systemic issues that the food industry faces. First, over half of adults are overweight and obese - the UK has the 3rd highest rate of obesity across the EU and rates are still increasing. Second, despite the fact that the food industry in Britain is highly efficient 4.3 million tons of food is wasted in the supply chain. The average family spends nearly a fifth (18%) of their budget on food but throw away the equivalent of 6 meals per week. Third, the global food system is responsible for up to 30% of total greenhouse gas emissions and if our diets met dietary standards the greenhouse gas emissions from our food would drop by 17%.

In the summer of 2021 the Board agreed to the development of a regional food plan that would look to address these challenges, and help to support and build a sustainable and climate resilient economy. The Food Plan will be aligned to Government's National Food Strategy and international work around developing sustainable, resilient, healthy and fair food systems.

A great year ahead

Levelling-up

On 2 February 2022, Michael Gove, Secretary of State for Levelling Up, Housing and Communities (DLUHC) unveiled the government's flagship Levelling Up White Paper. The Paper sets out a complete 'system change' of how government works that will be implemented to level up the UK. The white paper aims to change geographical inequalities and bring success to the whole country, making the economy stronger, more equal, and more resilient.

At the heart of this new way of making and implementing policy are 12 national missions to be achieved by 2030. These missions are the policy objectives for levelling up, and thus form the heart of the government's agenda for the 2020s.

These missions will be cross-government, cross-society efforts. The first mission, for instance, will see pay, employment, and productivity grow everywhere, and the disparities between the top and worst performing areas narrow. This is the first time a government has placed narrowing spatial economic disparities at the heart of its agenda.

As well as the 12 missions, Government have identified Six "Capitals" which are the drivers of growth and prosperity including physical capital (infrastructure and housing), and human capital (skills, experience, health).

Five Pillars underpin the new policy regime, and the 12 missions outlined above form one of the pillars.

Levelling-up

For Greater Brighton, there are a number of opportunities presented by the White Paper;

- Alignment to Government's net zero targets, mean green growth is very much to the fore. Having agreed the GB10 Pledges in 2020 and more recently the Blue Green Investment Plan, and being a big supporter of Hydrogen Sussex, the City Region is well placed to help Government deliver its objectives.
- Government places a high level of importance on the role creative industries will play in Levelling Up. Greater Brighton is home to a strong creative industries sector including some renowned clusters.
- The Government places emphasis on private sector investment driving change. Within the Blue Green Investment Plan the plans for a revised Infrastructure Panel include leveraging in private sector investment.

There are also some challenges within the paper. In several places the south-east is lumped in with London, which is a perennial problem that Greater Brighton leaders continue to lobby against. The Board will continue to make the strongest possible case for Government investment in Greater Brighton in order to level-up communities within our region.



Remarks from the Chair

Founded as part of the successful efforts to secure a City Deal for the region, since 2014 the Greater Brighton Economic Board has led the way in delivering almost £200m of investment across Adur, Brighton, Lewes, Mid Sussex, and Worthing.

In the years which followed, Greater Brighton's boundaries expanded to include Arun and Crawley, with the population of the city region growing to over a million people and an economy of over £21 billion.

With the City Deal funding coming to an end, the purpose of the board has increasingly shifted from overseeing the government's capital investment in the city region to identifying areas where collaboration across the board has the potential to deliver better outcomes than individual action alone. It is in this new role that the board has brought forward ambitious plans aimed at addressing a range of issues, with a particular focus on enabling a successful shift to net zero across the city region.

The release of the Levelling Up White Paper earlier this year brings with it both challenges and opportunities for our area. The goal of 'Levelling Up' is widely interpreted as meaning a refocusing of government support onto 'left behind' areas conventionally associated with the North of England, yet we have within our city region significant pockets of deprivation and for the UK to prosper economically we need areas such as Greater Brighton to continue to thrive.

The aims of the White Paper are ambitious, yet with the absence of substantial new public investment, the realisation of those goals hinges upon the decentralisation of powers to upper-tier authorities and functional economic areas, with the paper setting out a roadmap for devolution across the country as a whole. This forces a choice upon the board and in the coming months we will have to decide collectively what we believe will best deliver for our communities. Should we remain focused solely upon collaborating around an ad hoc set of issues or do we feel that Greater Brighton has the potential to take on those same decision-making powers which can be found across our competing city-regions? Which approach will best ensure we deliver for the people who live and work within our city region?

No one can deny that in the face of COVID-19, the last two years have proven the most challenging in the history of the board and yet I strongly believe that with the question of devolution looming, it is 2022/23 which is set to be Greater Brighton's most significant year.



Links and Resources
www.greaterbrighton.com