



GREATER BRIGHTON ECONOMIC BOARD

**19 OCTOBER 2021
10.00AM**

VIRTUAL MEETING

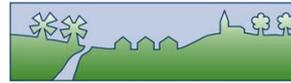
AGENDA



ADUR & WORTHING
COUNCILS



Lewes District Council



MID SUSSEX
DISTRICT COUNCIL



ADUR & WORTHING BUSINESS PARTNERSHIP



BRIGHTON & HOVE
ECONOMIC
PARTNERSHIP

**Coast to
Capital**



University of Brighton

US

University of Sussex



Members:	<p>Councillors: Lamb (Chair), Humphreys, Allcock, Ash-Edwards, Gunner, Nicholson, Mac Cafferty and Parkin</p> <p>Business Partners: Trevor Beattie, Andrew Green, Prof. Debra Humphris, Claire Mason, Dean Orgill, James Dempster, Andrew Swayne and Prof. Adam Tickell</p>
----------	---

Contact:	<p>John Peel Democratic Services Officer 01273 291058 john.peel@brighton-hove.gov.uk</p>
----------	---

AGENDA

12 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.

13 MINUTES OF THE PREVIOUS MEETING

7 - 12

To consider the minutes of the previous meeting held on 20 July 2021

14 CHAIR'S COMMUNICATIONS

GREATER BRIGHTON ECONOMIC BOARD

15 COAST TO CAPITAL EXPRESSION OF INTEREST UPDATE

Verbal Update

16 GREATER BRIGHTON RECOVERY REPORT AND ACTION PLAN

13 - 62

Report of the Chair, Greater Brighton Officer Programme Board

17 CLIMATE SUMMIT - NEXT STEPS

Verbal Update

18 GB10 PLEDGES ON THE ENVIRONMENT

63 - 82

Report of the Chair, Greater Brighton Officer Programme Board

19 INVESTMENT PROGRAMME PROGRESS UPDATE

83 - 110

Report of the Chair, Greater Brighton Officer Programme Board

The Board actively welcomes members of the public and the press to attend its meetings and holds as many of its meetings as possible in public.

Agendas and minutes are published on the council's website www.brighton-hove.gov.uk.
Agendas are available to view five working days prior to the meeting date.

Electronic agendas can also be accessed through our meetings app available through www.moderngov.co.uk

Meeting papers can be provided, on request, in large print, in Braille, on audio tape or on disc, or translated into any other language as requested.

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, 11 October 2021

The Date of the next meeting is 1st February 2022

GREATER BRIGHTON ECONOMIC BOARD

10.00am 20 JULY 2021

VIRTUAL MEETING

MINUTES

Present: Councillor Lamb (Chair) Allcock, Ash-Edwards, Humphreys, Gunner, Nicholson, Mac Cafferty and Parkin

Business Partners: James Dempster, Andrew Green, Clare Mason, Dean Orgill, Andrew Swayne, Prof Adam Tickell

PART ONE

1 RATIFICATION OF CHAIR

1.1 Natalie Brahma-Pearl read the following statement:

“At its meeting on 27 April 2020, the Board agreed to a number of recommendations as to its Operating Principles, one being the process by which the Chair of the Board would be nominated for the 2021/22 term. Since the previous meeting, a confidential nomination and voting process was undertaken in accordance with that agreement Councillor Lamb was nominated by fellow Board Members to the role of Chair of the Board for the 2021/22 municipal year”.

1.2 The Board unanimously agreed to appoint Councillor Lamb as Chair of the Board for the 2021/22 municipal year.

2 PROCEDURAL BUSINESS

2a Declarations of substitutes

2.1 There were none.

2b Declarations of interests

2.3 There were none.

2c Exclusion of the press and public

2.4 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.

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

3 MINUTES OF THE PREVIOUS MEETING

2.1 **RESOLVED-** That the minutes of the previous meeting held on 27 April 2021 be approved as the correct record.

4 CHAIR'S COMMUNICATIONS

4.1 The Chair thanked fellow members of the Board for being given opportunity to become Chair for 2021/22 that would give opportunity to refocus ahead of what would be a serious economic challenge to the Region in the course of the coming years. The Chair stated that one of his aims was to refocus on delivery of projects such as decarbonising the region's housing stock.

5 CRAWLEY RECOVERY FOCUS

5.1 The Board received a presentation from Clem Smith on the Crawley Recovery Focus.

6 GREATER BRIGHTON RECOVERY: WHERE NEXT?

6.1 The Board considered a report of the Chair, Greater Brighton Officer Programme Board that requested the Board commissions rapid, research by consultants as a snapshot of the City Region economy as it emerges from the pandemic, to outline the shape of recovery and identify stress points and agreement for the Greater Brighton Programme Board to lead on the work of re-focussing the purpose and ambition of the partnership using the findings of the updated report.

6.2 Multiple Board Members proposed bringing forward an update report in October 2021 rather than February 2022 due to the urgency of the matter.

6.3 Geoff Raw noted that research was required to put forward bids for investment to government and obtain private sector investment in what was a competitive market.

6.4 Max Woodford confirmed a report could be brought to the next meeting or at the very least detailed feedback.

6.5 RESOLVED-

1) That the Board commissions updated and rapid, research by consultants as a snapshot of the City Region economy as it emerges from the pandemic, to outline the shape of recovery and identify stress points.

2) That the Board agrees for the Greater Brighton Programme Board to lead on the work of re-focussing the purpose and ambition of the partnership using the findings of the updated report.

- 3) That a report outlining how partners can pool resources and work collectively to deliver outcomes that benefit all members goes to the 1st February 2022 Economic Board meeting.

7 LOW CARBON ECONOMY BLUE/GREEN PRINT

- 7.1 The Board considered a report o the Chair, Greater Brighton Officer Programme Board that sought agreement for the development and production of a net-zero innovation led economy Investment Plan (Blue/Green Print) to use as a lobbying tool. Approval that the Board attend, support and promote the events taking place across the region in the lead up to COP26 this November in Glasgow and that the Board tasks officers to look at working with other regional partners to host a Greater Brighton led Climate Summit in October 2021 to showcase the work and current aspirations happening within the region as part of the preparation for the road to Cop26.
- 7.2 Geoff Raw noted that attendance at COP26 and hosting a summit would give the opportunity for alignment and make a case for significant investment opportunities.
- 7.3 Councillor Mac Cafferty welcomed the report that built on a lot of good work that had previously been undertaken and addressed the potential opportunity in dealing with the serious and pressing problem of global warming.
- 7.4 Andrew Swayne stated his support for the report and highlighted that projects and initiatives relating to a green economy was a very strong USP for the Region.
- 7.5 Councillor Nicholson welcomed the report stating that a strategic vision for a green economy was intrinsically linked to the economic recovery of the Region.
- 7.6 Councillor Humphreys stated that he was apprehensive that hosting and attending a summit would be a big effort for little gain however, he had been assured by the comments made by Geoff Raw as well as endorsement of the report by other Board Members.
- 7.7 Councillor Gunner stated that he was supportive of the first two recommendations however, he had some concern that no financial figures were detailed in the report and no quantifiable measures of success.
- 7.8 Councillor Allcock stated that he endorsed the report that was progressive and responsible, and he was sure that officers would reflect on the comments made.
- 7.9 Nick Hibberd stated that the Region needed to attract investment and the report covered areas where the tangible benefit would be attracting investment for a pipeline of projects.
- 7.10 Geoff Raw noted that the timetable for the summit was tight however, a lot of the initial work had already been undertaken and the logistics of the event would not be as demanding as a summit attended in person. A draft agenda for the summit could be circulated to the Board and Brighton & Hove City Council would be meeting most of the cost of hosting the event.
- 7.11 Councillor Parkin and the Chair thanked Geoff Raw for his comments that had provided assurance.

7.12 RESOLVED-

- 1) That the Board agree to the development and production of a net-zero innovation led economy Investment Plan (Blue/Green Print) to use as a lobbying tool. This investment plan will outline the region's investment requirements to be leaders in the UK's green industrial revolution and transition to net zero.
- 2) That the Board attend, support and promote the events taking place across the region in the lead up to COP26 this November in Glasgow.
- 3) That the Board tasks officers to look at working with other regional partners to host a Greater Brighton led Climate Summit in October 2021 to showcase the work and current aspirations happening within the region as part of the preparation for the road to Cop26. This showcase could demonstrate the benefits of partner collaboration enhancing our collective action to address the climate crisis whilst promoting economic recovery.

8 CREATION OF A GREATER BRIGHTON RETROFIT TASK FORCE

- 8.1 The Board considered a report of the Chair, Greater Brighton Officer Programme Board that sought approval for the establishment a Greater Brighton City Region Retrofit Task Force to ensure the city-region's homes and buildings are fit for a zero-carbon future. This work will be overseen by Lewes District Council and led by the University of Brighton.
- 8.2 The Chair stated that Crawley had undertaken some work in this area and were happy to share that and assist with work going forward.
- 8.3 Councillor Allcock welcomed the report and asked if locally based suppliers and people could be appointed to undertake the work and what thoughts had been given into bring private landlords into the scheme.
- 8.4 Ian Fitzpatrick confirmed that the community wealth building would be a central part of the project delivery and there were methods to bring in the private sector such as offering parts and materials at the same cost as the public sector price.
- 8.5 Councillor Nicholson welcomed the report that was the starting point toward a much bigger ambition. A key factor in the success of the scheme would be collective working, local training and skills development and boosting local supply chains.
- 8.6 **RESOLVED-**
 - 1) That the Board expresses support of working together on a city region wide project, led by Lewes District Council and the University of Brighton, to find the best solutions in the decarbonisation of council owned housing stock. The board acknowledges that this agreement is in principle whilst some of the detail continues to be worked through noting that local authority members will need to approve to proceed through their own processes.
 - 2) The Board agrees for the regional Task Force to be established at speed and delegates the authority for this group to lead on the work.

- 3) The Board agrees that the governance arrangements for the Task Force are that it reports back on emerging findings to the Greater Brighton Economic Board in April 2022, with the completed Asset Management Plan and Roadmap in October 2022.

9 GREATER BRIGHTON FOOD PLAN

- 9.1 The Board considered a report of the Chair, Greater Brighton Officer Programme Board that requested approval to begin the scoping work for a Greater Brighton Food Plan focussed on building resilience and integrating innovations.

9.2 RESOLVED-

- 1) That the Board agree to begin the scoping work for a Greater Brighton Food Plan focussed on building resilience and integrating innovations. This scoping work will involve time commitments from relevant officers and employees.
- 2) That the Board agree for the scoping work to commence and, subject to the findings being positive, that officers take forward the preparation of a food plan and present the plan for consideration and approval by the Board in April 2022.

10 GREATER BRIGHTON INVESTMENT PROGRAMME

- 10.1 **RESOLVED-** That the Board note the report and the Investment Programme Update at Appendix 1.

The meeting concluded at 12.05pm

Signed

Chair

Dated this

day of

Subject:	Recovery Report and Action Plan
Date of Meeting:	19th October 2021
Report of:	Chair, Greater Brighton Officer Programme Board
Contact Officer: Name:	Claudia Raistrick
Email:	Claudia.raistrick@brighton-hove.gov.uk
LA(s) affected:	All

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

- 1.1 The Greater Brighton Economic Board ('the Board') is ready to play a leading role in economic recovery in the region and new opportunities are rapidly emerging to show leadership in our Region, to forge more collaborative working and to promote initiatives to mitigate threats in the post-pandemic economy.
- 1.2 At the July 2021 meeting, the Board agreed to commission rapid research by consultants as a snapshot of the City Region economy as it emerges from the pandemic, to outline the shape of recovery and identify stress points. It was also agreed that a workshop would take place to scrutinise the findings of the research to re-focus our approach and outline our ambition to deliver an updated Greater Brighton vision.
- 1.3 The Board agreed to bring a report to the October 2021 meeting, combining the updated report and the workshop outcomes to deliver a re-focussed approach outlining our ambition to deliver an updated Greater Brighton vision.

2. RECOMMENDATIONS:

- 2.1 That the Board note the findings of the research, carried out by Hatch (appendix 1)
- 2.2 That the Board note that the draft action plan is still in an early form, and work will commence to broaden the scope of the plan to reflect the regional projects and ambition.
- 2.3 That the Board delegate authority to the Greater Brighton Programme Board to continue working on the draft action plan, taking into account any Board Member discussion and reflecting strategic steer on priorities given at this meeting, and seek sign off via Local Authority CEOs and Board Business Partners at the appropriate time, so that work can commence at pace..
- 2.4 That the Board delegate authority to the Greater Brighton Programme Board to oversee the delivery of the action plan, and monitor and evaluate progress.

- 2.5 That the Board note that work has begun to source a live data feed to inform future decision making.

3. CONTEXT/ BACKGROUND INFORMATION

- 3.1 In the summer of 2020, the Greater Brighton Economic Board commissioned Hatch to undertake a short and sharp assessment of the current and likely impacts of the pandemic on the Greater Brighton region. At that stage of the pandemic, there was limited available economic and labour market data and as such the Board and many other economic partnerships across the country focused on short-term measures to protect the economy based on economic forecasts.
- 3.2 One year later, we are still in the midst of the pandemic. However, with the raft of temporal data available it is possible to begin to glean what the economic impact has been – and is likely to be – on the Greater Brighton region. The pandemic has framed what a prosperous and attractive place the region is to live in with high demand by potential future residents.
- 3.3 Our proximity to London and the perception of advantage that we have by being located in the South East means we may miss out on any ‘levelling up’ effect. It is not helped by the fact that the data used to categorise local authority’s into priority bandings, was 2018/19 pre-covid data. This meant that Crawley were put in the least in need tier for the Levelling Up Fund, which is not where it should be in terms of needing support to recover from the economic effects of covid.

Key findings of the report:

- 3.4 Many of the region’s businesses have found opportunities during the pandemic and designed new services and products with national demand. However, as a visitor economy hotspot, the region has been hit by the subsequent waves of lockdown and the impacts on the high street and those working in arts and culture will take time to recover. And there has been a significant impact in Crawley as flight volumes through Gatwick continue to remain low.
- 3.5 Since the start of the pandemic, the Greater Brighton region has lost an estimated 7k PAYE jobs (net) with 7k people having found new jobs. Across the Greater Brighton total earnings paid on a PAYE basis has reached a high point and now exceeds pre-pandemic levels. This is unique as in most other parts of the country, total payroll earnings remain lower than the pre-pandemic figure in March 2020.
- 3.6 As there has been a net loss of 7k payroll employees, this means that salaried employees are earning more on average post-pandemic than they were before the pandemic. Survey evidence indicates that the increase in pay has not been shared equally across the pay scale and has disproportionately benefited higher earners. This reflects the higher concentration of professional and management roles located across the region.
- 3.7 Across the region 17k additional people now claim work-related benefits. While the numbers have increased, when taken as a proportion of the working age

adult population, the rates remain roughly in line with the UK average, with some regional differences, notable higher than average rates in Crawley.

- 3.8 Greater Brighton business insolvencies are running at higher rates than the UK average. Since the start of the pandemic, almost 900 Greater Brighton businesses have gone into liquidation. The rate of insolvencies is slightly higher than the UK average and this likely reflects the larger share of small professional services firms and consultancies based in the region – businesses that are reliant on short-term contracts.
- 3.9 The Stamp Duty holiday combined with a desire for more outside space drove the residential property market in areas outside of London. As a result many areas across Greater Brighton achieved property price growth that outstripped London and the wider South East.
- 3.10 One of the most notable patterns is the lagged return to use of public transport across the Greater Brighton region. At present the use of public transit stations, including rail and bus, is down 50% on pre-pandemic levels. This is significantly lower than the England average which is 20% below.

Sectoral Analyses:

3.10 The following sectors are covered in the analyses:

1. **Creative, arts and digital**
2. **Aviation and logistics**
3. **Retail and high streets**
4. **Tourism and cultural**
5. **Financial services and professional services**
6. **Agriculture and viticulture**
7. **Manufacturing**

Key findings:

- 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 cultural sector was impeded by lockdowns but has rallied over the summer months

- Financial services and professional services sectors did well during the pandemic
- Agriculture and viticulture has been impacted by restrictions on events and hospitality
- Manufacturing has been impacted unevenly with some sub-sectors thriving and others being severely impacted

Action plan:

- 3.11 The recovery workshop attended by the Greater Brighton Programme Board and local authority CEOs reviewed the 2020 Recovery Plan actions, under the Greater Brighton themes. Participants discussed which actions to continue working on, which had been completed and which ones were no longer relevant. People were also encouraged to put forward new or emerging pieces of work to support or deliver. Out of this workshop an action plan has been drafted, with SMART targets so that progress can be monitored. Following Board member discussion about strategic direction of the Greater Brighton Economic Board's work, and thought given to prioritisation of the actions, work will continue to revise the draft into a deliverable action plan. This work is proposed to be carried out by the Greater Brighton Programme Board who will also oversee the delivery of this plan.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

- 4.1 In creating a deliverable action plan with clear timescales and tangible outputs, the work of the Board can be clearly tracked and progress monitored. The ongoing economic impact of COVID-19 cannot be ignored and a 'continue as we were' approach is not feasible. The Board agreed at the last board meeting in July to produce an updated sustainable Recovery Plan for the region. The recommended actions within the revised plan have been shared with Board members for their feedback and so represent their views. They will be monitored on an ongoing basis by the Greater Brighton Programme Board.

5. COMMUNITY ENGAGEMENT & CONSULTATION

- 5.1 The Greater Brighton Recovery Report and Action Plan has been circulated and shared with board members who have provided their feedback, which has been incorporated into the plan.

6. CONCLUSION

- 6.1 The Greater Brighton region has continued to be significantly impacted by the COVID-19 pandemic, notably in the creative, arts, visitor economy, retail and transport sectors. The Action Plan highlights the actions the Board can take to mitigate against the impacts and encourage the economy to grow in a sustainable way. The Board must work together and across geographical boundaries to make this happen.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 The Greater Brighton Economic Board supported the Recovery Report and Action Plan with the estimated cost of £9,000 being met from 2021/22 Greater Brighton Economic Board operational budget. There are no further financial implications expected regarding the completion of the draft action plan.

Finance Officer Consulted: Rob Allen

Date: 04/10/21

Legal Implications:

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

Lawyer Consulted: Joanne Dunyaglo

Date: 04/10/21

SUPPORTING DOCUMENTATION

Appendices:

1. Greater Brighton Recovery Report
2. Greater Brighton Draft Action Plan

Background Documents

1. None

COVID-19 Impact Assessment

Greater Brighton Economic Board

Report – Workshop 7th September 2021



Table of Contents

1. Report Forward
2. Section 1 – Economic impacts
3. Section 2 – Sectoral impacts
4. Section 3 – Post COVID economic trends



Note about data sources and approach:

The analyses contained in this report were undertaken during 1 August 2021 and 24 August 2021. All data contained in this report is the most up to date available at the time.

Sources include ONS, HMRC Gazette Insolvency data, Google Mobility data and various surveys conducted by GBEB partners. Where possible the report uses datasets that are available at a small spatial area and allows the Greater Brighton economic area to be aggregated. Where this is not possible, regional data sets have been adjusted to reflect the Greater Brighton spatial area.

Report Forward

In the summer of 2020, the Greater Brighton Economic Board commissioned Hatch to undertake a short and sharp assessment of the current and likely impacts of the pandemic on the Greater Brighton region. At that stage of the pandemic, there was limited available economic and labour market data and as such the Board and many other economic partnerships across the country focused on short-term measures to protect the economy based on economic forecasts.

One year later, we are still in the midst of the pandemic. However, with the raft of temporal data available it is possible to begin to glean what the economic impact has been – and is likely to be – on the Greater Brighton region. The pandemic has framed what a prosperous and attractive place the region is to live in with high demand by potential future residents. Many of the region’s businesses have found opportunities during the pandemic and designed new services and products with national demand.

However, as a visitor economy hotspot, the region has been hit by the subsequent waves of lockdown and the impacts on the high street and those working in arts and culture will take time to recover. And there has been a significant impact in Crawley as flight volumes through Gatwick continue to remain low.

During the Autumn months the Government plans to unwind a number of COVID support schemes, namely the CJRS and SEISS, and further rounds of business loans are unlikely. The cessation of these programmes will reveal the extent to which economic damage was temporary or permanent. Supporting people through labour market transitions and businesses to continue trading will be key to preventing economic scarring.

Over the following pages is a summary of where the Greater Brighton region stands, using the most up to date economic data. Following that is a summary of the current position and challenges faced by the region’s core sectors.

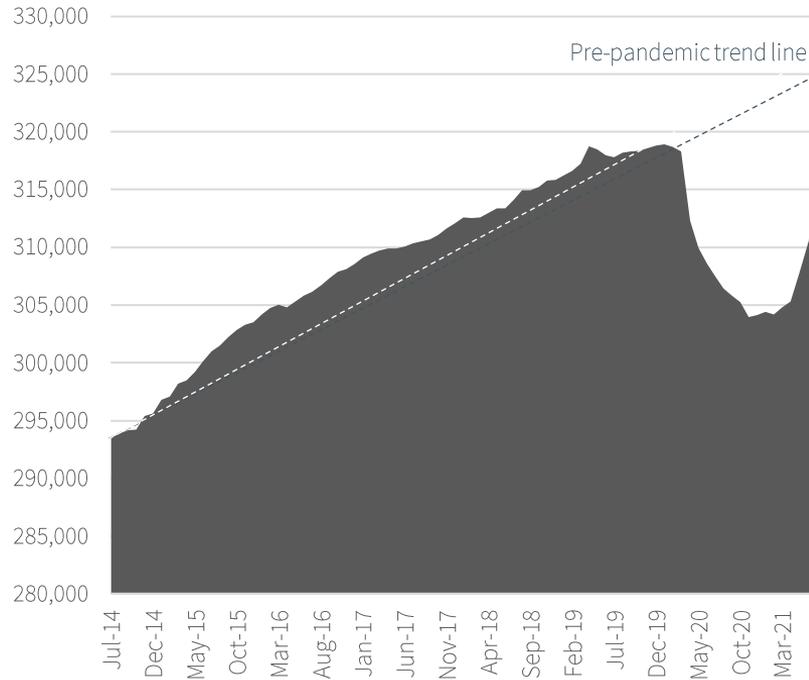
The purpose is to provide a baseline of quantitative and qualitative data and intelligence Greater Brighton Economic Board representatives can use to inform ideas on for a unified, regional response. Initial ideas will be discussed at a workshop on 7th September 2021.

Central to this will be the opportunity to transition to a low carbon / net zero economy. This is a key element of GBEB priorities and will be key to both economic recovery and tackling the climate emergency.

+ Section 1: Impacts of COVID on Greater Brighton

Since the start of the pandemic, the Greater Brighton region has lost an estimated 7k PAYE jobs (net) with 7k people having found new jobs

Total number of people on payroll in GB



Source: HMRC RTPi data up to July 2021, Hatch analysis

Copyright © Hatch 2021. All Rights Reserved.

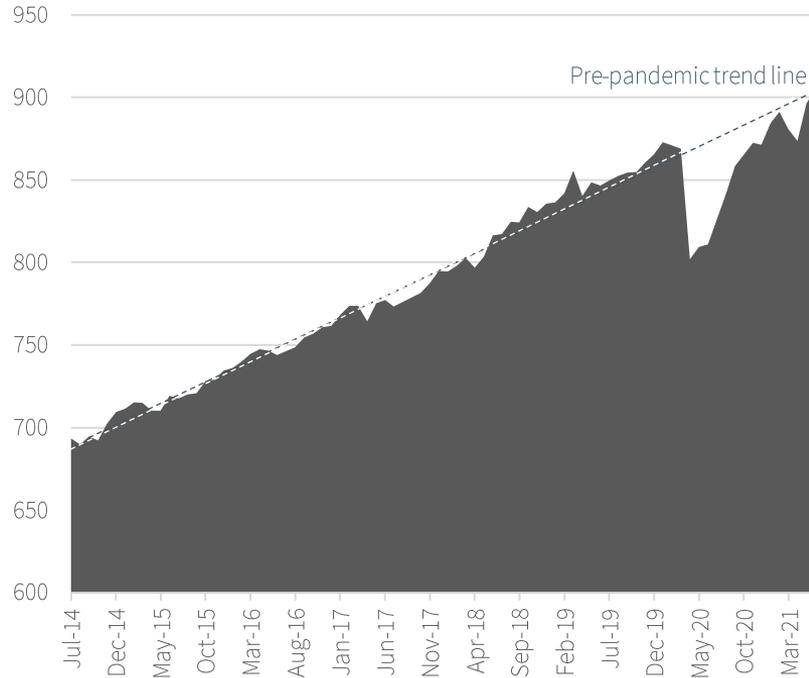
Before the pandemic, the Greater Brighton region had about 400k jobs. In March 2020, 318k of these jobs were salaried positions with formal employment status where staff were PAYE registered with HMRC. The number of payroll registrants fell as people were made redundant. Some redundancies resulted from the insolvencies of major retailers with a high street presence in the Greater Brighton region as well as smaller professional services firms. Other redundancies resulted from corporate restructuring as businesses sought to reduce fixed costs.

In late 2020/early 2021, about 14k payroll jobs had been lost, but in the intervening months there have been 7k new PAYE registrants which means that half of all people who lost a job since the start of COVID have found replacement work. As the economy continues to improve over the coming months, this figure should increase.

However, had the pandemic not happened, following historical trend lines, the region would have an estimated 325,000 on payroll against a figure of 312,000 for June 2021. In addition, many of the people showing up on PAYE may be on furlough, as discussed below.

Greater Brighton PAYE residents are earning more than they ever have

Total Earnings (£mns) of people on payroll in GB



Source: HMRC RTPi data up to July 2021, Hatch analysis

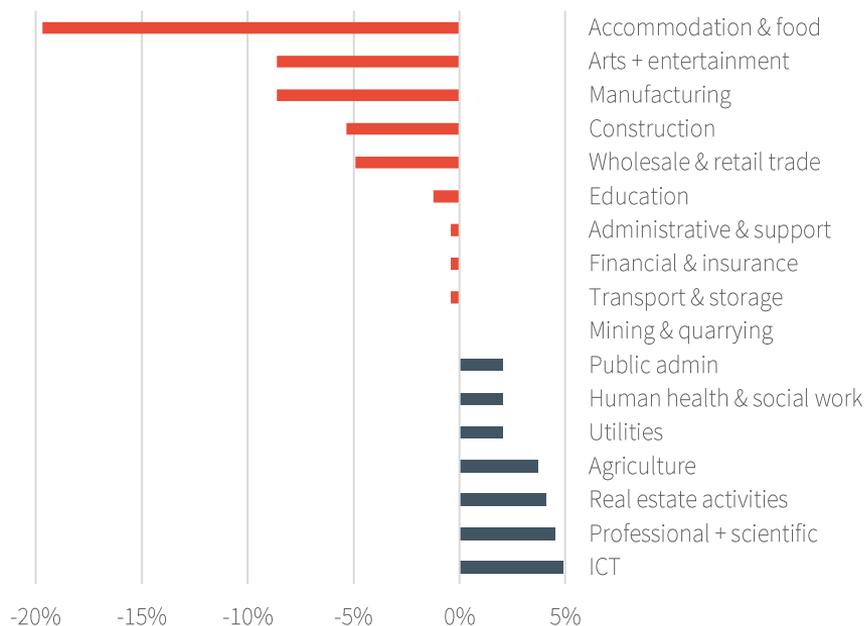
Across the Greater Brighton total earnings paid on a PAYE basis has reached a high point and now exceeds pre-pandemic levels. Regional monthly payroll earnings for July 2021 reached £905mn. This is unique as in most other parts of the country, total payroll earnings remain lower than the pre-pandemic figure in March 2020.

As there has been a net loss of 7k payroll employees, this means that salaried employees are earning more on average post-pandemic than they were before the pandemic. Survey evidence indicates that the increase in pay has not been shared equally across the pay scale and has disproportionately benefited higher earners through discretionary bonuses to retain staff. (FT)

This reflects the higher concentration of professional and management roles located across the region.

There have been shifts in the sectoral distribution of jobs with an overall net loss of about 60k jobs

Change in workforce jobs by sector between March 2020 and March 2021



There has been a net reduction in the number of workforce jobs across Greater Brighton despite the continuance of the CJRS scheme. The net reduction of workforce jobs is 1.4% which compares favourably against the equivalent figure of 3% loss for the UK.

The loss of workforce jobs reflects the fact that many businesses have chosen to downsize or close in the face of ongoing challenges. However, as closures in sectors such as retail and accommodation and food have been well-publicised, there has been less acknowledgement of the growth in workforce jobs across several Greater Brighton sectors.

The sectors include public health and admin (as would be expected) as well as ICT, real estate and professional and scientific. This likely reflects the more long-standing changes brought about by the pandemic that are currently and will continue to benefit the region – namely changes in spending and living patterns, the shift of businesses to online platforms, the move of professional services firms out of expensive urban centres and people and families relocating.

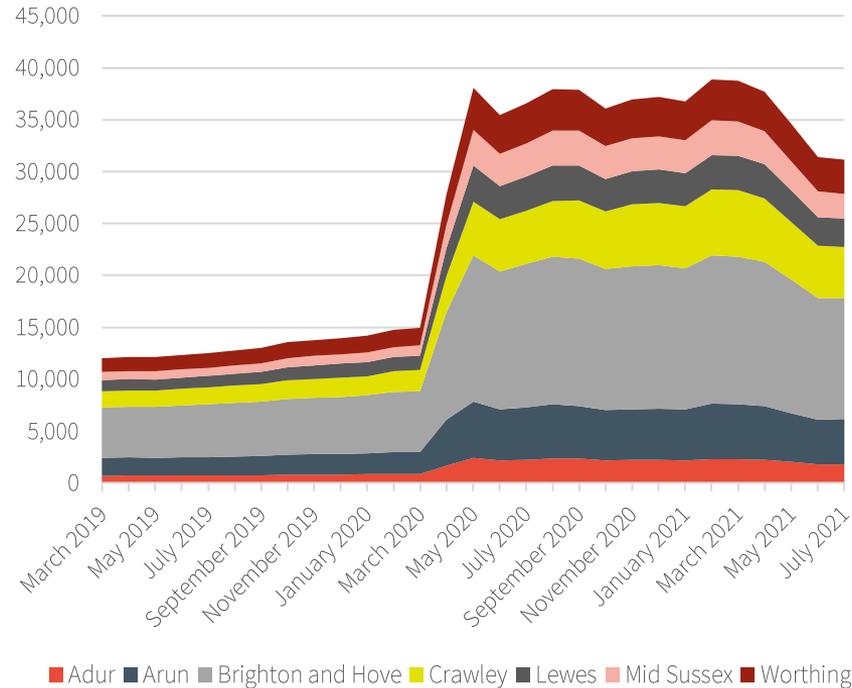
Source: NOMIS (DWP) workforce jobs by sector, March 2021, Hatch analysis

Note: Transport and storage includes aviation

Copyright © Hatch 2021. All Rights Reserved.

Across the region 17k additional people now claim work-related benefits

Claimant count



As would be expected, the claimant count has spiked since the start of the pandemic with an additional 17k people now claiming work-related benefits. The greatest increase in volume has been in Brighton & Hove, which is directly linked to the impact of lockdowns and social distancing on the city's tourist economy. There has been a slight decrease since the start of this summer, however the figures have plateaued.

As the payroll decrease was 7K (per previous slide) this suggests that many people who were self-employed or on short-term contracts have found it unable to find work and have been forced to claim benefits.

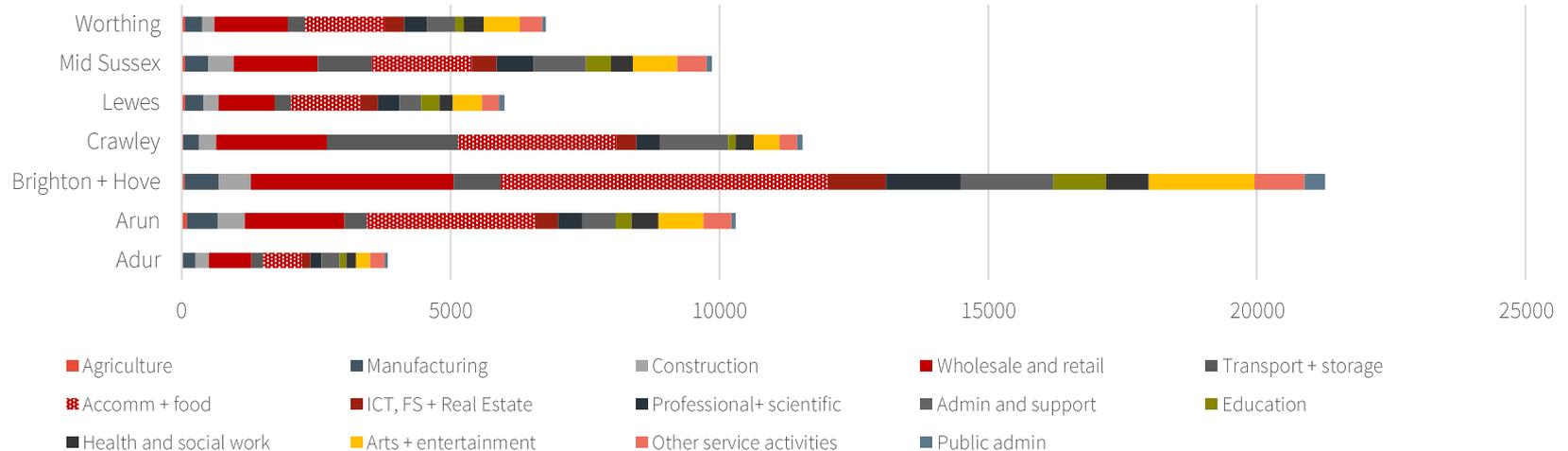
While the numbers have increased, when taken as a proportion of the working age adult population, the rates remain roughly in line with the UK average, with some regional differences, notable higher than average rates in Crawley.

Source: NOMIS (DWP) claimant count volumes up to July 2021, Hatch analysis

Copyright © Hatch 2021. All Rights Reserved.

In April 2021 12.5% of the Greater Brighton working age population was on furlough

Count of people on CJRS by sector



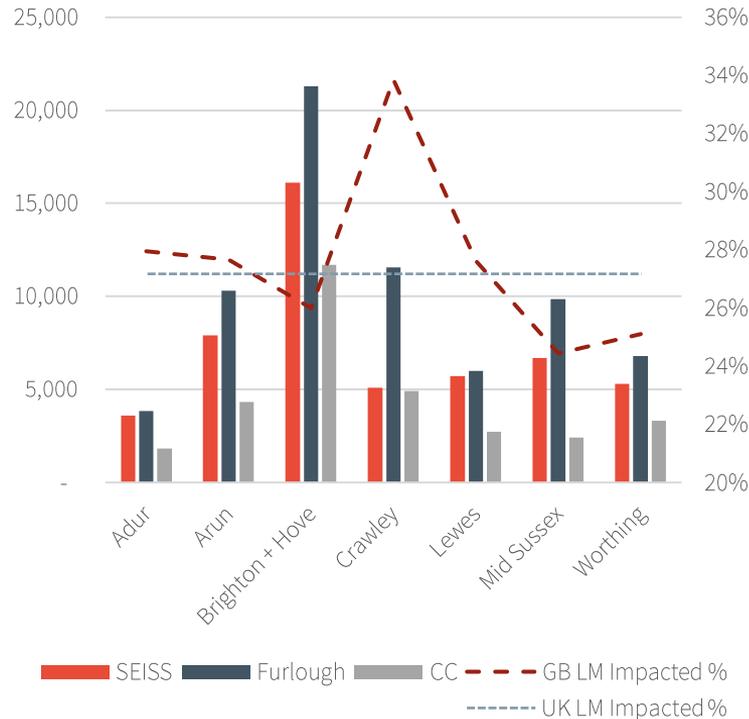
Source: CJRS (HMRC) Statistics. July 2021 release (covering up to April 2021), Hatch analysis

Just under 70k people were on CJRS in April (latest available data). The CJRS take-up rate of 12.5% is in line with the UK figure of 12.1% for April. The numbers may have dropped over the summer months as businesses staffed up to support day trips and longer family breaks. Half of all people in the Greater Brighton region on CJRS

work in visitor economy-related sectors, namely retail, accommodation and food, and arts and entertainment. The CJRS scheme is due to close on 31 September and the Government has provided no indication to date that the scheme will be once again extended. There is a risk that some people on CJRS will be made redundant on closure of the scheme.

With 27% of all working age residents reliant on state support

Claimant, CJRS and SEISS counts by local authority



The claimant count alone does not provide a full story. Across the region there are many more people on furlough (thus still on PAYE) than there are claiming benefits. And more people reliant on Self Employment Income Support Scheme (SEISS) that there are claiming benefits. Both the CJRS and SEISS schemes will end in September 2021.

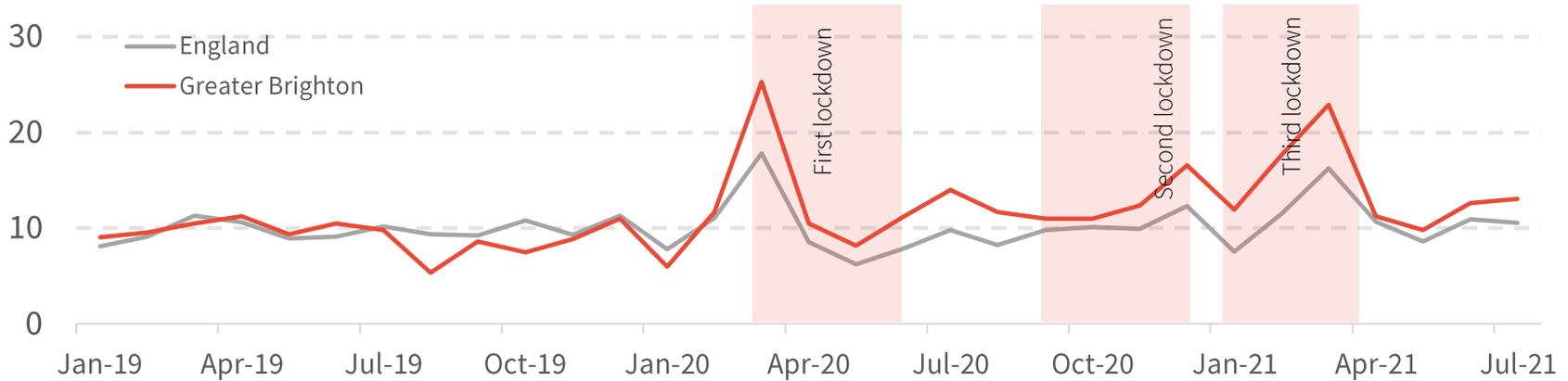
There is a high risk that a proportion of people on CJRS will be made redundant on the termination of the scheme and will sign-on for benefits as they search for work. In addition, the closure of the SEISS scheme will also push self-employed workers to claim as well. It is difficult to predict the impact on claimant count volumes, though it is inevitable there will be a sharp increase over the coming months.

When taken together – CJRS, SEISS and claimant count – across the Greater Brighton region, 27.4% of the working age population are being supported by the state. This is in line with the national average of 27%. There are some important spatial differences with Crawley experiencing a higher-than-average rate of 33% (reflecting the ongoing repercussions of low flight volumes to Gatwick Airport) and whilst Brighton & Hove have the highest numbers in volume, are below national average.

Source: NOMIS (DWP) claimant count volumes; HMRC SEISS volumes, HMRC CJRS volumes; all data June 2021, Hatch analysis
 Copyright © Hatch 2021. All Rights Reserved.

Greater Brighton business insolvencies are running at higher rates than the UK average

Total insolvencies per 10,000 businesses (Gazette data)



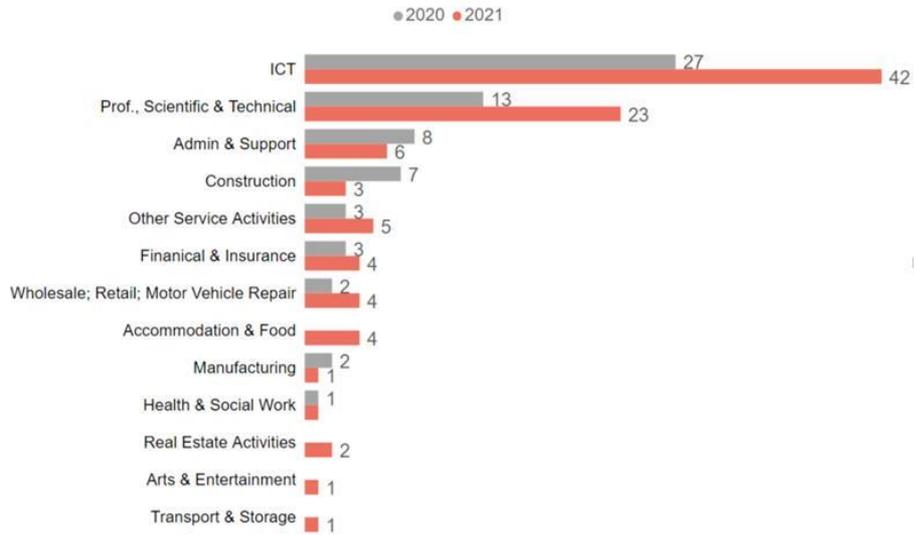
Source: Gazette, monthly insolvency and liquidation orders registered at the Court of Rolls, Hatch analysis

Since the start of the pandemic, almost 900 Greater Brighton businesses have gone into liquidation. This means they have either have been declared or are in the process of being declared insolvent by the Court of Rolls. The rate of insolvencies is slightly higher than the UK average and this likely reflects the larger share of small professional services firms and consultancies based in the region – businesses that are reliant on short-term contracts.

The pattern of insolvencies over the three lockdowns has mirrored the national pattern with the third lockdown having a particularly strong impact. Major businesses based in the Greater Brighton region that became insolvent include Brighton Holiday Homes.

Insolvencies have been concentrated in professional services and ICT, which reflects the make-up of the GBR business base

Greater Brighton business insolvencies by sector (Jan-June)



The Greater Brighton region has a greater proportion of SME ICT and professional services firms and this is reflected in the insolvency breakdown by sector. The chart on the left shows the volume of insolvencies for the period of January through June for 2020 and 2021.

In the ICT sector, many of the businesses that became insolvent in 2020 were directly related to online advertising – designing of online advertising campaigns and deployment of front-ends. During the first lockdown retailers and consumer services suspended variable costs and this had a direct impact on these businesses. This year many of the ICT businesses in trouble have been in the software design space.

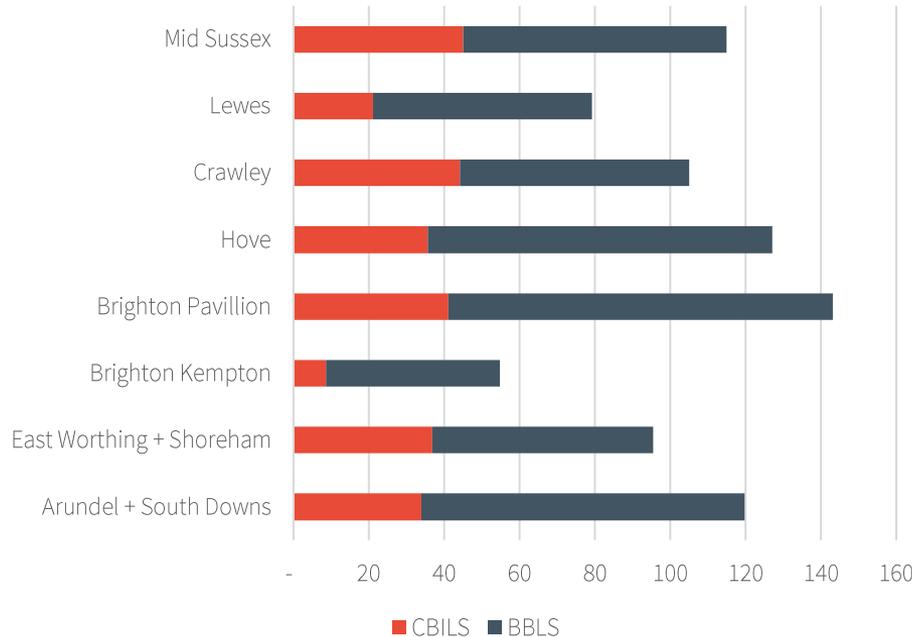
There has also been an uptick in professional services insolvencies year on year. This reflects the small size of many of these small consultancy businesses, with limited cash on balance sheet.

Source: Gazette, monthly insolvency and liquidation orders registered at the Court of Rolls for period Jan to June, Hatch analysis

28

Greater Brighton businesses have received £840mn in loans through government schemes

Total loan value (£m) as of July 2021 by local authority



Source: British Business Bank (BBB) CBILS and BBLs monthly reporting by Parliamentary Constituency, Hatch analysis

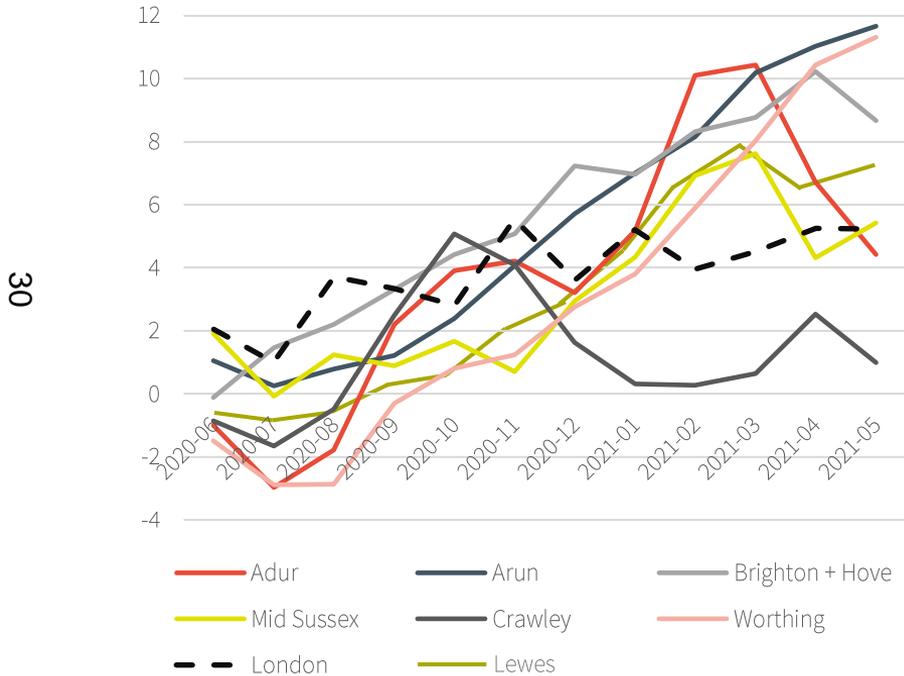
To support businesses experiencing loss of demand and cash flow issues, the Government put in place two loan schemes. The Coronavirus Business Interruption Loan Scheme (CBILS) provides loan up to £5mn to businesses with turnover up to £45mn and was recently replaced by the Recovery Loan Scheme (RLS). The Bounce Back Loan Scheme (BBLs) provided smaller loans of £50k or less.

Across the Greater Brighton region, £840mn of loans were secured by businesses through the two schemes. A total of 1k CBILS loans were negotiated (of £250k average loan value) and 20k BBLs loans of on average £30k. Both schemes offer up to a one-year repayment holiday and many businesses are approaching the 12-month repayment deadline. There is ongoing lobbying to government to extend the repayment holiday beyond 12-months.

Survey evidence shows that loans have been used to cover payroll and pay supply chain to ensure businesses continues uninterrupted. There has been some suggestion that some funds have been to make capital purchases to aid with expansion.

Residential property price growth in Greater Brighton is outstripping many parts of the country, with the exception of Crawley

YoY (%) change in house price index



Source: ONS HPI dataset through to May 2021, Hatch analysis

Copyright © Hatch 2021. All Rights Reserved.

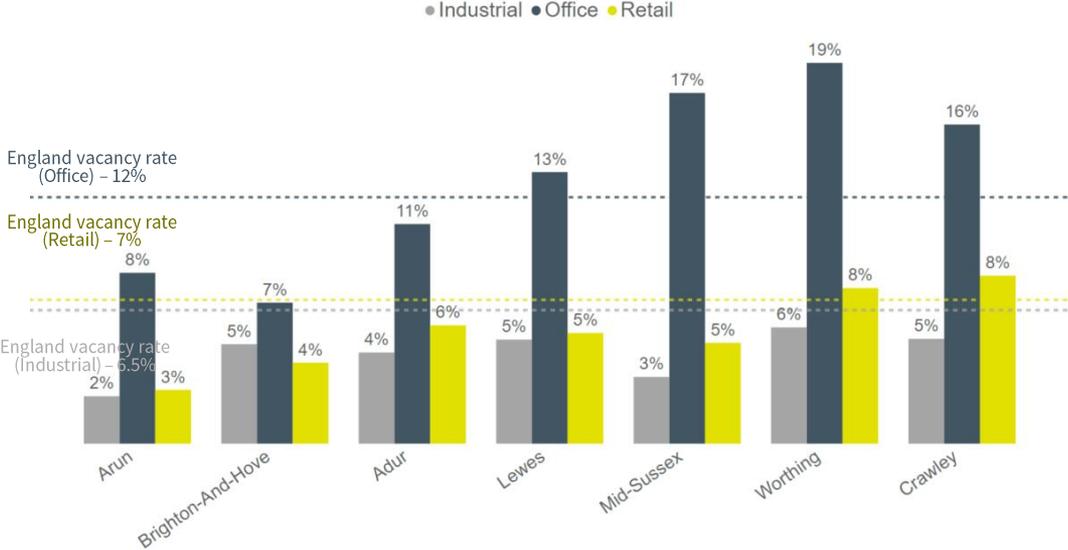
The Stamp Duty holiday combined with a desire for more outside space drove the residential property market in areas outside of London. As a result many areas across Greater Brighton achieved property price growth that outstripped London and the wider South East.

Over the coming months this pattern is expected to continue, even as Stamp Duty returns to regular rates from October 2021. Many businesses based in London and the South East are considering formalising hybrid and flexible working which will enable people and families to move outside of daily commuting catchment areas. The Greater Brighton region is particularly desirable given its sophisticated and culturally-rich towns and cities, coastline and national parks.

This presents an opportunity for the region to attract more high earning residents (and their spending power) into the region.

Commercial vacancy rates are creeping upwards with high vacancy rates for office space

Vacancy rate for GBEB Local Authorities by Use Class, June 2021



Source: Squire Data, vacancy counts, Hatch analysis

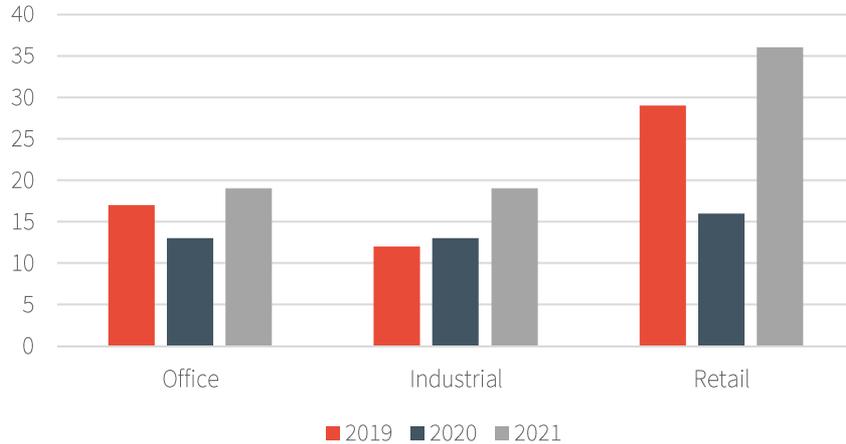
An interesting pattern is emerging in the Greater Brighton commercial real estate market. Despite the fact 20,000+ chain store outlets have closed since the start of the pandemic, the vacancy rate for retail space remains lower than the England average, with the exception of Worthing and Crawley. This may reflect the diversification of the retail offer and preponderance of independent shops. The industrial vacancy rate is also significantly below the England average.

Of note is the higher vacancy rate for office space. The rates seen in Worthing, Crawley and Mid-Sussex are in line with what is being seen in medium-sized urban centres. This partially reflects a reduction in lease take-up by small professional firms where staff can work from home. However, this available space may provide an opportunity for competitive locations to develop town-based workhubs that offer an “office when needed” to people working at home with main offices further away. Or some sites may be converted to residential under the new Permitted Development legislation.

31

Commercial lease transaction volumes are higher in 2021 than they were for the full 2019 year

Volume of commercial lease transactions, full year 2019 + 2020, 6-months for 2021



Source: Co-Star data, transaction counts, Hatch analysis

In the first six months of 2021, the number of commercial property transactions outstripped 2019 volumes for the full-year. There is particularly high demand for retail space despite the success of online shopping during the pandemic, particularly for sites in Brighton.

Location of commercial lease transactions in 2021

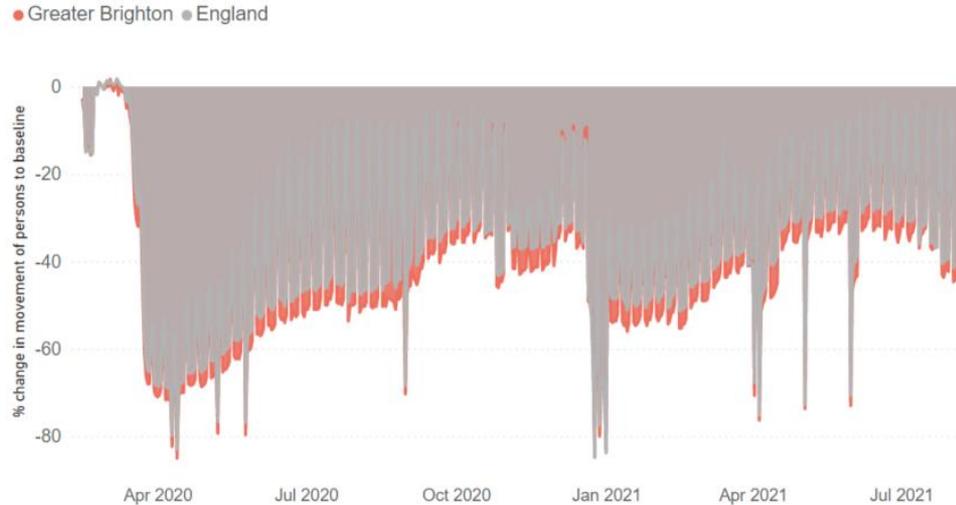


Source: Co-Star data, transaction counts, Hatch analysis

Hayward's Heath and Crawley have seen a number of industrial property transactions particularly for logistics-related premises as well as office space. The high transaction volumes illustrate the fact some existing office and industrial spaces may be in the wrong locations.

Greater Brighton residents are returning to work at slower rates than the rest of England

Workplace mobility at workplaces across Greater Brighton



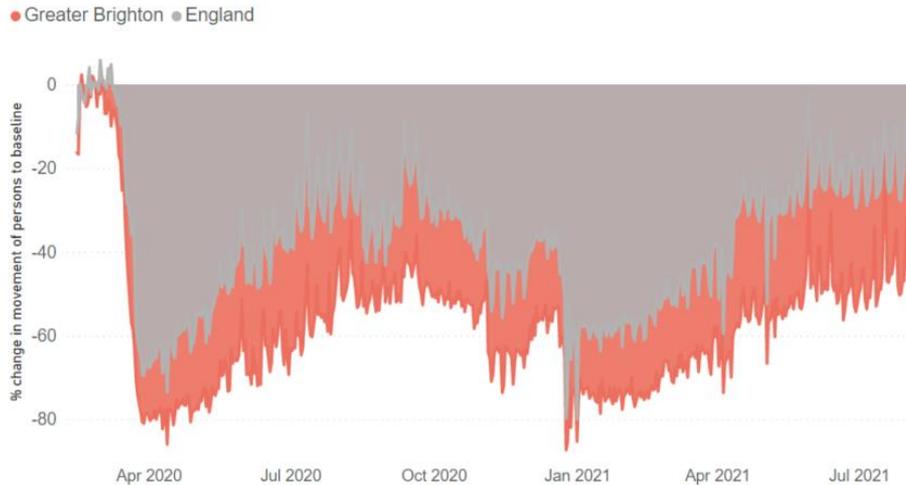
Source: Google Mobility, pre-pandemic baseline = 0, Hatch analysis

Across the UK, workplaces have 40% fewer people movements (as recorded by mobile phone towers) than at pre-pandemic levels. The numbers started to improve during the spring, with levels reaching sub-30%. However, over the summer months fewer people have returned to the office, perhaps reflecting a greater propensity to work at home as children are off from school. Greater Brighton resident movements have been the most active of all UK cities at returning to the workplace with *Centre for Cities* reporting 49% return to work rate for Brighton against an 18% rate for the UK.

It will be instructive to track workplace movements over the autumn months to determine whether the high rates of Greater Brighton residents returning to work holds and what proportion remains a permanent change with roughly 30% of the workforce no longer commuting to an office. If this is the case, this shift will impact on the stores and amenities located near offices across the region.

Widespread reluctance to return to public transport across the Greater Brighton region

Transit station mobility, GBR (Google Mobility data)



Source: Google Mobility, pre-pandemic baseline = 0, Hatch analysis

One of the most notable patterns is the lagged return to use of public transport across the Greater Brighton region. At present the use of public transit stations, including rail and bus, is down 50% on pre-pandemic levels. This is significantly lower than the England average which is 20% below.

It is possible that the use of public transport is being replaced by private vehicle which would be detrimental to the region's environmental goals. It may also reflect a reduced public transport during the pandemic.

Work may be required to overcome residents' reservations about the use of public transport to prevent a permanent behaviour change.



Section 2: Sectoral Analyses

The following sectors are covered in the analyses:

1. Creative, arts and digital
2. Aviation and logistics
3. Retail and high streets
4. Tourism and cultural
5. Financial services and professional services
6. Agriculture and viticulture
7. Manufacturing

1. Creative, Arts and Digital has been badly hit and will take time to recover

Pre-COVID

- The creative, arts and digital sector makes up around 15% of the area's total business base, generating a turnover in excess of £1.5 billion. Most creative and digital activities in the region revolve around music (11.7%), marketing and advertising (11.4%), design (10.8%), architecture and planning (10.3%), computer software (9%), apparel and fashion (8%) and arts and crafts (8%). Other smaller activities include publishing, PR & comms, media production and photography. Since 2014, growth has been particularly prominent in the software and performing arts.
- Creative businesses are very small: out of the 22% businesses that have no employees, a quarter are in the creative industries
- Creative and digital businesses are technology intensive and highly reliant on international import-export chains: 34% of technology intensive businesses and 36% of creative businesses were more likely to export internationally; and 47% of technology intensive businesses and 34% of creative industries relying on imports of goods or services
- Businesses in this sector were already fragile with one in five businesses mentioned lack of demand as an obstacle to business growth with many seeking to relocate outside of the region due to high costs

COVID Challenges

1. Alongside the tourism and retail/wholesale industry, the creative sector is among the most affected by the coronavirus crisis. Lockdown and social distancing measures have significantly changed the way we interact with creative content, given the lengthy duration of closures endured by the likes of galleries and theatres. Indeed, more than 11% of the sector's business base had not returned to trading as of August 2021 according to the ONS BICS Survey.
2. The visual and performing arts (galleries, theatres and events) and traditional media production activities (TV, radio, newspaper, books and advertising) have been hard hit by the crisis, with the majority of these sectors being forced to suspend their activities. This has had an immediate impact on self-employed freelancers, who have found themselves out of work, facing bankruptcy and in urgent need of financial support, leading to an uptick of around 5% in the volume of creative professionals ceasing their work in the creative sector during April-June 2020 according to the Creative Industries Policy and Evidence Centre's December 2020 report.
3. Oxford Economics have predicted a GVA drop of around £29 billion for the creative sector—this represents a contraction twice the rate of the broader economy. This will involve the redundancies of approximately 122,000 permanent workers in the sector and 287,000 freelancers.

2. Aviation continues to be hit whereas the logistics sector has experienced significant growth

Pre-COVID

- The broader logistics sector, of which *some* Aviation activities are a part, is of significant importance to the GB region – accounting for 7% of all employment, with a location quotient of 1.5 vs England (i.e. degree of employment density where 1.0 is the same degree as England) as of 2019. The size of the sector (not including its supply chain) was £1.9bn in 2019 – also 7% of the GBEB region's total GVA.
- The UK is the world's third largest air passenger market, with 120m passengers flying to the UK in 2019, supporting 1.5m jobs and generating around £100bn Gatwick Airport which was the second busiest airport in the UK. Through direct activities associated with the airport the sector supported economic output of £1.5bn in 2016, with a further £1.1bn of indirect economic output*.
- Greater Brighton is a hub for aviation, aerospace and defence manufacturing which is driven largely by the direct activities associated with Gatwick Airport.
- Prior to the Covid-19 pandemic the airport had reported that there had been growth in both passenger numbers and revenue in the 9 month period leading up to 31st December 2019. The published results, by Gatwick Airport, showed that just under 37 million passengers passed through the airport, resulting in an 0.3% increase. The increase in passengers was mainly down to long haul flight passengers**.

COVID-Challenges

1. The latest data from London Gatwick shows that the airport saw a 93% drop in air traffic movements between January 2020 and January 2021. Only 17% of destinations served by Gatwick are currently on the destination 'green list' (August 2021). In the first six months of 2021, the airport made a £245mn loss.
2. Gatwick does not expect flight numbers to return to 2019 levels for 24 to 36 months. This reduction in traffic will have a knock-on effect on locally-provided services and international HQs locating near the airport. Unite estimate that the UK aviation sector has endured over 61,000 job losses since the start of the pandemic, as of March 2021.
3. Whilst rules on self-isolation for returning UK holidaymakers have been relaxed (provided they are double jabbed), numerous disincentives remain in place against people travelling by air, including the cost of tests which is incurred by the consumer, the possibility of having to isolate abroad, and extra paperwork required to fly overseas.
4. Logistics firms have faced short-term challenges to setup regional operations to keep up with demand and with many in the process of reprofiling operations to provide centres located near to large populations instead of relying on two or three national hubs.

3. Retail and high streets were impacted during lockdowns but the independent retail sector is now growing

Pre-COVID

- The Retail and High Street sector accounts for 18% of the total business base in the region as of 2020, based on a Hatch selection of SIC codes. This is equivalent to 14% of all employment in the region.
- As of August 2021, Google Mobility data suggests that people are returning to high streets at a slower rate than England.
- Retail activity is particularly established in Brighton and Hove (with an employment density of 1.1 relative to England, as of 2019, according to the Business Register and Employment Survey). Brighton city currently sits at 22nd in the UK CACI retail towns ranking.
- The Business Survey further highlighted online competition as one of the key challenges to growth that businesses in this sector face. The lack of financial resources was also cited as an obstacle to growth, resulting in low levels of product and service innovation in the retail sector.

COVID Challenges

1. Retailers across the UK have reported the sharpest fall in sales in the year to April 2021, a level unmatched since the financial crisis of 2008. Although conditions for the Retail and High Street sector have improved since then, the British Retail Consortium has said that the recovery is now slowing* and vacancies continue to rack up across British town centers.
2. Ipsos Mori are detecting greater comfort amongst the British population to return to pre-pandemic activities such as going to restaurants, hairdresses, and bars and clubs. Its latest polling (July 2021) found increases of around 5 percentage points on people feeling 'comfortable' re-engaging in such activities compared to the previous month.
3. Similar research by GfK highlights that "people are notably less worried than they were a year ago about the virus and the health of those around them" and therefore willing to re-engage in behaviors recently outlawed by lockdown such as retail/recreation. COVID consumer behaviors may "stick" long after the crisis, however, with an accelerated shift to online shopping, as well as alternative forms of delivery, the behavior change is expected to remain permanent features of consumer behavior going forward.

Sources: <https://brc.org.uk/news/corporate-affairs/retail-sales-strong-but-slowing/>, Comfort in returning to "normal", 8-11th May 2021, Ipsos Mori, Impact of COVID-19 on consumer behaviour, July 2021, GfK, British Independent Retailers Association

4. Tourism and cultural sector was impeded by lockdowns but has rallied over the summer months

Pre-COVID

- The GB region possesses outstanding tourism and culture offers, backed by a strong hospitality sector. In Brighton and Hove alone, there are 14,000 jobs in the accommodation and food services sector, making up around 42% of all the employment in that sector across the region. Brighton was the tenth most visited town in the UK by both inbound and overseas visitors in 2019.
- The thriving performing arts sector had a yearly turnover of £329m in 2019 and employed 3,500 people and benefited from the Royal Pavilion, Brighton Museum & Art Gallery, Brighton Dome & Theatre Royal, and events such as the Brighton Pride and Brighton Festival. Another key event is the Sussex Festival of Performing Arts. The proximity to the South Downs National Park is also an attractive factor of the region's visitor economy.
- Overseas visitors to the region accounted for 20% of all visitors in 2019, a drop from the 26% in 2016. Scandinavia, Germany, the United States, France and Australasia were the most frequently mentioned countries of origin. Domestic visitors mainly come from the South East (24%) and the Greater London Area (20%). The main reasons for visiting Brighton include going to the beach (26%) and seeing friends/relatives (18%).

COVID-19 Challenges

1. The impact of COVID-19 has been severe. Although lockdown restrictions are lifted in the UK as of July 2021, there remains hesitancy about attending non-socially distanced venues according to Ipsos Mori (May 2021). There is emerging evidence that this hesitancy will take time to overcome.
2. Many businesses in the tourism and cultural sectors owe significant rent arrears to landlords. There is ongoing uncertainty over who is accountable to pay for months of lost rent incurred during the three national lockdowns.
3. The events value chain supporting the tourism and culture sector has also been hard hit. As of April 2021, the city of Brighton and Hove still had approximately 29% of workers in the accommodation sector furloughed – compared to 26% for the UK as a whole. As of August 2021, 90% of firms in the accommodation and food service sectors had returned to trading as normal. This was the same for other tourist destinations across the region.
4. In spite of lockdown restrictions ending fully in July 2021, social distancing measures remain in place which has reduced capacity and revenues even for venues that are able to reopen.

5. Financial services and professional services sectors did well during the pandemic

Pre-COVID

- The professional, scientific and technical sector is one of the more-established sectors in the region with concentrations in Crawley, Brighton and Hove and Mid Sussex.
- Some new notable campuses are being established including the Science and Technical Park in Burgess Hill, the Environmental Technologies Centre near the Brighton City (Shoreham) Airport and the Sussex Innovation Centre near Brighton Station with further investments by the region's universities.
- There had been a trend for firms with global and national HQs based in London to base support and back-office functions in the region as the cost per desk was lower. In addition, many professional services firms set up regional hubs to service local clients.
- The region was home to a large number of SME professional services firms, namely small consultancies and marketing agencies.

COVID-19 Challenges

- The financial services sector has been more resilient to the impacts of the pandemic due as employees were able to work remotely. Economic output for the sector dropped 3% during the pandemic with 2% of eligible jobs furloughed compared to 13% average for the whole economy.
- The sector has been surprised at how seamless the move to home working has been. Large firms, including Barclays, have stated that they may no longer require their London HQ in Canary Wharf and instead operate using a series of satellite offices. This provides an opportunity for the Greater Brighton region as up to two thirds of FS employees live outside of London.
- Accountants and restructuring experts (management, operations and strategy consultants) are likely to be in high demand, as small businesses and large organisations will look to restructure their debt and work around cash shortages caused by the Covid 19 crisis. UK banks will put aside £5bn to cover the first quarter of loan losses which gives an indication of the upcoming scale of support required.

6. Agriculture and viticulture has been impacted by restrictions on events and hospitality

Pre-COVID

- The UK food and drink sector generates around £121bn annually and employs over 4 million people making it the largest manufacturing sector in the country*. The Greater Brighton region has one of the largest horticulture industries which supports 9,000 jobs and generates around £1billion for the economy.
- The Greater Brighton agriculture sector is supported by the historically booming tourism industry that attracts around 24.5 million tourists to West Sussex annually. The tourism jobs that are created by the industry in West Sussex equate to around 8,500 in the food and drink industry with the direct expenditure at £346 million in the food and drink industry.
- The viticulture sector is a growth market five new vineyards established annually since 2016 and helping to establish an international brand for the region. The sector now boasts one of the greatest vineyards in the world with Ridgeview vineyard, and in 2019 it became the only British vineyard to be included in the Top 50 vineyards in the world global list.
- The horticultural sector has experienced strong growth with many brands starting as small family businesses such as Kate's Cakes and Higgidy Pies and the Real Pie Company.

COVID Challenges

1. The agricultural sector suffered initially as a result of the closure of hospitality but recovered once new home markets were accessed.
2. The viticulture sector has suffered with the restrictions on the wedding industry. The wedding sector contributes +£14bn to the economy of the UK annually. Many sectors have been impacted by the inability to hold wedding celebrations which includes the wine merchants and the rest of the food and drink industry.
3. The pandemic posed a greater threat to the wine industry in 2020 than climate change and increased tax. The break in the production and supply chains combined with increased demand through household consumption created a perfect storm. The local Ridgeview vineyard exports to a number of countries including Japan and USA with production expected to hit over 500,000 bottles by 2023.
4. The agricultural sector has been hampered by the combined factors of Brexit, the pandemic, and the ongoing shortage of labour to harvest has create challenges. This has led to some interruptions to market with reports of higher spoilage than in previous years, all of which have impacted bottom lines.

7. Manufacturing has been impacted unevenly with some sub-sectors thriving and others being severely impacted

Pre-COVID

- Advanced manufacturing is a key sector in the economy with around 830 businesses and 8,000 people. The area has a variety of world leading high-tech manufacturing businesses including Rolls Royce Motor Cars, Bowers and Wilkins and Eurotherm.
- Prior to Covid the advanced manufacturing sector had been negatively impacted by Brexit uncertainty. According to research from Make UK (the UK manufacturing body) the sector had ground to a halt at the end of 2019 and had experienced big drops in European exports over previous years.
- The Greater Brighton Business Survey found that 55% of manufacturing companies export internationally, which is over double the SME national average. Additionally, 18% of the manufacturing businesses stated that they were heavily reliant on EU markets, while 30% of manufactures stated economic uncertainty as a reason for not innovating.

COVID Challenges

- The manufacturing sector was classed as essential and remained open through the restrictions. The lifting of coronavirus restrictions on the 19th July has positively impacted the manufacturing industry with the sector expected to grow twice as fast in 2021 with Make UK reporting the highest quarterly output volumes since the research began 30 years ago.
- The adaptability of the manufacturing sector resulted in a 'call to arms' to help combat Covid, with Ricardo using its expertise and resources to create bespoke face shields for the NHS healthcare staff.
- The pandemic led to changes in commuting behaviour, which combined with concern about the climate crisis led to a substantial uplift in bicycle sales. Prior to the global pandemic electric vehicles (EV's) were experiencing rapid growth, although the future market has been predicted to both increase and decrease. However, initial data shows that while the automotive market has taken a dive the EV sector has shown strength which could continue.
- Greater Brighton firms such as Zedify have successfully used the Clean Growth UK support and they use zero-emission electric cargo bikes to deliver food, office suppliers and other goods across congested towns. The company originated in Brighton and now spans across 9 UK cities employing 100 people.

+ Section 3: Post-COVID economic trends

Post-COVID economic trends

Set out below are some of the universal themes that are expected to drive the reshaping of the UK economy over the coming years.

Accelerate opportunities to transition to low carbon through infrastructure investment.

Prioritisation of locally-sourced food supply chains to tackle food miles and support local agriculture and viticulture.

Permanent shift to remote working and hybrid working for some professions.

New consumer behaviors (e.g. online shopping) will stick and this will drive a repurposing of high streets/town centres.

Restructuring of corporate portfolios with an increase in mergers and acquisitions activities and 'greening' activities.

Successful places will develop place-specific policies and activities that build on the momentum of these national trends.

Emphasis on living near natural assets and move from urban conurbations to improve quality of life.

Growth of domestic staycation market as families consider environmental (and financial) barriers of overseas travel.

Acceleration of digital health with emphasis on proactive diagnostics for direct use by consumers.

Renewed interest in corporate cost-savings and stream-lining as businesses scramble to repay government-backed loans. ji

Accelerate opportunities to invest in low carbon businesses.



Important Notice

This document has been prepared by Hatch for Greater Brighton Economic Board (“The Board”) and solely for the purpose on the terms agreed with The Board. We accept no liability (including for negligence) to anyone else in connection with this document.

The Information used in preparing this document has been provided from third party sources. Hatch has not sought to establish the reliability of those sources nor verified such information. Accordingly, no representation or warranty of any kind (whether express or implied) is given by Hatch as to the accuracy contained in this document.

COVID-19 Recovery Plan

Greater Brighton Economic Board

DRAFT – Recommendations and Actions



GBEB's current levers and mandate

The Greater Brighton Economic Board (GBEB) is a formal partnership constituted in 2014 by the Greater Brighton City Deal with membership drawn from local authority elected representatives and officials, universities, economic partnerships and industry. GBEB is a non-statutory board with the following levers:

- A. Convening powers to create, coordinate and secure opportunities for the region
- B. Direct dialogue with the region's innovators and technology platform providers
- C. Leveraging the region's cross-party political power with unified messaging
- D. Coordinating local authority programmes and use of directly owned assets to maximise collective impact

A review of past action plans and strategies drafted by GBEB was undertaken to identify current and common economic development themes, past initiatives and activities to develop a multi-year action plan for GBEB. The action plan has been shaped under the umbrella of a framework to prioritise collective economic development priorities over the short-term (during the post-COVID era) and guide the path for future growth.

The Framework

Long-term strategic outcome (2031)

Greater Brighton is prosperous and net zero with opportunities that deliver a better standard of living for everyone.

Five-year objectives (2021-2026)

Resilient	Talented	Creative	Connected	International
-----------	----------	----------	-----------	---------------

Progress Indicators (reported annually)

<ul style="list-style-type: none"> • Vol carbon emitted • Vol carbon absorbed • Net position 	<ul style="list-style-type: none"> • # new skilled residents • # trained by specialism • # new jobs 	<ul style="list-style-type: none"> • Revenue growth • # of listed companies • # of events/production 	<ul style="list-style-type: none"> • Avg fibre speed • # of EV points • Avg train speeds • # of 5G users 	<ul style="list-style-type: none"> • Visitor spend • Global livability index • # new global business HQs
---	--	---	--	---

Actions to be led by GBEB 2021/22

Set up Decarbonisation Investment Fund	Post furlough LM action plan	Undertake spatial office space review	Coordinate 5G test-bed campaign	Establish dedicated corporate relocation service
Launch GB Climate Change 5 consumer initiatives	Establish GB Digital Talent Board	Coordinate Expo 23 campaign	Regional spatial plan for EV infrastructure	Restore international tourism

Long-term strategic outcome (2031)

The definitions incorporated in the long-term strategic outcome are as follows:

Greater Brighton is **prosperous** and **net zero** with **opportunities** that deliver a better **standard of living** for **everyone**.

Prosperous:	higher GVA per capita than other UK regions and/or a higher fiscal contribution
Net Zero:	reduction of regional CO ² emissions and increase in CO ² absorption to parity
Opportunities:	jobs, training, investment capital and customers
Standard of Living:	income inequality, air quality, access to nature, nutrients and food, medical and social care
Everyone:	children, elderly, students, adults, employed, unemployed and those with specific needs

Five-year objectives (2021-2026)

The proposed five-year objectives are as follows:

Resilient	Talented	Creative	Connected	International
Establishing Greater Brighton as the most net zero-forward region in the UK measured through reduction in CO2 emissions	Creation of quality jobs and skills development, particularly in new economy and technology opportunities linked to the region	Number of native creative and digital businesses scaled-up and excelling in national and global markets.	The most connected region for people (physical movement), ideas (networks) and information (FTTP + 5G).	Greater Brighton a recognised brand for sustainably focused, creative innovation.

Progress Indicators

Each five-year objective should be backed up by a plan for measurement and monitoring using 2021 as the baseline. Suggestions for potential measures for each are set out below:

Resilient	Talented	Creative	Connected	International
<ul style="list-style-type: none">• Vol carbon emitted• Vol carbon absorbed• Net position	<ul style="list-style-type: none">• # new skilled residents• # trained by specialism• # new jobs	<ul style="list-style-type: none">• Revenue growth• # of listed companies• # of events/production	<ul style="list-style-type: none">• Avg fibre speed• # of EV points• Avg train speeds• # of 5G users	<ul style="list-style-type: none">• Visitor spend• Global livability index• # new global business HQs



- Create a GBEB Progress Dashboard with 2021 as baseline.
- Report annually against long-term outcome and five-year objectives
- Provides measure of progress, holds Board to account and can be used as evidence with government and regional positioning

Actions to be led by GBEB in 2021/22

Proposed GBEB actions for 2021/22:

Resilient	Talented	Creative	Connected	International
Set up Decarbonisation Investment Fund (DIF)	Post furlough LM action plan	Undertake spatial office space review	Coordinate 5G test-bed campaign	Establish dedicated corporate relocation service
Launch GB Climate Change 5 consumer initiatives	Establish GB Digital Talent Board	Coordinate Expo 23 campaign	Regional spatial plan for EV infrastructure	Establish Inward Investment R&D desk

Proposed actions have been included in the framework only if the action:

- Would benefit from cross-regional coordination/oversight
- Isn't already being carried out by local authorities or C2C
- Can be delivered using GBEB's existing powers and levers
- Is directly linked to the ten-year outcome and five-year objectives

The pool of actions has been limited to ten to ensure focus and maximise the chance of successful delivery.

Resilient Actions 2021/22

Five-Year Objective	GBEB Actions 2021/22	Description	Aim
Resilient	R1: Set up Decarbonisation Investment Fund	GBEB to establish an outline design for a regional Decarbonisation Investment Fund. The Fund would be run by a third party (e.g. Triodos Bank) and would obtain low-rate finance from the UK Infrastructure Bank to make security-backed loans to businesses, industry and transport providers to enable decarbonisation capital programmes.	To establish a high-profile Fund to signal the region's commitment to decarbonisation while providing a practical instrument that helps existing businesses and industries take practical action.
Resilient	R2: Launch GB Climate Change 5	There are a range of climate change initiatives such as One Planet Plate, an initiative aimed at encouraging restaurants to create dishes with minimal carbon footprint. GBEB to short-list initiatives to cover major areas of the consumer economy (e.g. retail, food and drink, supermarkets, hotels) and adopt and champion 5 initiatives as part of the GB Climate Change 5.	To provide Greater Brighton businesses and consumers with options aligned to the region's net zero aims. It also helps to establish Greater Brighton as the most net-zero forward region as a means of attracting like-minded businesses, students and residents.

Talented Actions 2021/22

55

Five-Year Objective	GBEB Actions 2021/22	Description	Aim
Talented	T1: Post-furlough LM action plan	GBEB to establish a short-term Labour Market (LM) group to track changes in payroll and claimant counts across the areas of the region (both drops and increases). The aim is to quickly pick up the places where the closure of the CJRS scheme is leading to redundancies and coordinate regional agencies including Jobcentre Plus and support national campaign including Kickstart. Alongside that, business creation and pockets of unfilled vacancies will be monitored spatially.	To quickly diagnose unemployment hot-spots - with particular concern around Crawley – and coordinate regional action to maximise the chances of people transferring to growing sectors. To identify locations with high volumes of new business registrations and unfilled vacancies.
Talented	T2: Establish GB Digital Talent Board	GBEB to establish a Digital Talent Board, which will complement C2C’s Skills Advisory Panel (SAP). Whereas the SAP is focused on regional skills, the Digital Talent Board will draw membership from advanced technology firms and research departments (e.g. Sussex Centre for Quantum Technologies and Future Networks).	The aim of the Board is to establish a detailed picture of the advanced capabilities already available in the region to draw talent and new businesses and to share ways to improve the region to draw-in targeted talent pools.

Creative Actions 2021/22

Five-Year Objective	GBEB Actions 2021/22	Description	Aim
Creative	Cr1: Undertake spatial office space + creative space review	GBEB to commission a spatial office and commercial space review on behalf of the region. The nature and use of offices is undergoing a massive change as companies and workers adopt hybrid working practices. The review will assess the availability, location and appropriateness of current office and commercial stock across the region with recommendations for change and will look at measures to create dedicated working space for creative sectors.	To coordinate a regional plan, drawing on directly owned office and commercial assets to establish Greater Brighton as a natural home for regional corporate hubs and workers seeking hybrid working environments who plan to relocate out of cities.
Creative	Cr2: Coordinate Expo 23 campaign	GBEB to establish a region-wide competition and communications to showcase businesses at Expo 23 in Buenos Aires. The theme of Expo 23 is <i>Creative Industries in Digital Convergence</i> . Expo 23 will provide a global stage for Greater Brighton's creative digital businesses to obtain global customers and investment.	To use Expo 23 as a means of creating region-wide focus by creative digital businesses on new international markets and providing a collective deadline to bring new products and prototypes to market.

Connected Actions 2021/22

Five-Year Objective	GBEB Actions 2021/22	Description	Aim
Connected	Co1: Coordinate 5G test-bed campaign	GBEB to work with the Digital Catapult Centre to find ways to increase involvement by businesses in the Brighton 5G testbed. This should include direct involvement by local authority public services (e.g. social care provision) to design and test use-cases that would lead to better outcomes.	To increase participation in the region's 5G test-bed. Awareness of how to participate and what companies could benefit, particularly in the area of local public services is low. Greater participation may lead to break-through innovations, particularly in net zero public services.
Connected	Co2: Regional spatial plan for EV infrastructure	GBEB to commission a region-wide spatial plan for EV infrastructure that includes input by major EV infrastructure companies such as Gridserve. The act of commissioning and publishing the plan will act as a catalyst for investment as many EV infra firms are waiting for firm signalling from regional development agencies.	To establish Greater Brighton's future transport plans as net zero and catalyse the development of a strong and well thought out EV infra to attract like-minded businesses and residents.
Connected	Co3: Hydrogen Sussex	GBEB to work with Hydrogen Sussex to identify regional coordination activities, particularly around local authority run fleets, to accelerate regional adoption of hydrogen.	To support Hydrogen Sussex to achieve its aim of stimulating the development and adoption of alternative fuels.

International Actions 2021/22

Five-Year Objective	GBEB Actions 2021/22	Description	Aim
International	I1: Establish dedicated relocation service	GBEB to coordinate a proactive inward relocation service to target national and global companies seeking hub offices in the UK South East. GBEB will draw on existing services and help commission new ones to provide a seamless service to international and national businesses including providing a list of potential offices meeting their specifications, coordinating visits by corporate decision-makers and providing an overview of city services to relocating staff.	To establish Greater Brighton as the easiest region in the SouthEast to relocate to for businesses considering moving HQs out of expensive London and international businesses looking to establish a UK HQ.
International	I2: Restore international tourism	GBEB to lead the establishment of a new strategic tourism body to coordinate and shape Greater Brighton's international tourism offering by providing a single, consolidated message, comprehensive offer that reflects the region's strengths and maximise marketing power.	To establish Greater Brighton as the most vibrant and attractive UK destination for international tourists outside of London, with high brand awareness and step-change increase in international visitors.



Important Notice

This document has been prepared by Hatch for Greater Brighton Economic Board (“The Board”) and solely for the purpose on the terms agreed with The Board. We accept no liability (including for negligence) to anyone else in connection with this document.

The Information used in preparing this document has been provided from third party sources. Hatch has not sought to establish the reliability of those sources nor verified such information. Accordingly, no representation or warranty of any kind (whether express or implied) is given by Hatch as to the accuracy contained in this document.

Subject:	10 Pledges on the Environment Update 2021
Date of Meeting:	19th October 2021
Report of:	Chair, Greater Brighton Officer Programme Board
Contact Officer: Name:	Kirsten Firth
Email:	Kirsten.firth@brighton-hove.gov.uk
LA(s) affected:	All

FOR GENERAL RELEASE

1. PURPOSE OF REPORT AND POLICY CONTEXT

1.1 The Greater Brighton Economic Board ('the Board') oversaw the development of 10 Pledges on the Environment, which all GBEB members signed up to in October 2020. It was agreed at this meeting to report back on progress made at the October 2021 Greater Brighton Economic Board.

This report gives an update, one year on, on the 10 Pledges. It demonstrates that 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.

Appendix 1 provides more detail on each Pledge, and **Appendix 2** provides a list of relevant research in the University of Sussex.

1.2 Further work is planned to develop leadership in developing the low-carbon economy and this is noted as 'next steps'.

1.3 The Pledges form the background to the Board's development of a Blue/Green Investment Plan. They contribute to demonstrating that the Greater Brighton area can be an exemplar to government about how to decarbonise a small city, rural communities and coastal areas.

2. RECOMMENDATIONS:

- 2.1 That the Board notes the progress demonstrated on the 10 Pledges on the Environment since October 2020
- 2.2 That the Board supports the actions needed to take the Pledges forward in the next year to October 2022.
- 2.3 That the Board receives a further annual update on the 10 Pledges in autumn 2022.

3. CONTEXT/ BACKGROUND INFORMATION

- 3.1 The Economic Board oversaw development of GB10 Pledges that sit above the Energy and Water plans. These 10 environmental pledges are approved actions agreed and ratified by the Board in October 2020. The Pledges are a promotional tool which is used to push forward the city region's work towards a post carbon economy through a variety of channels. When they were agreed in 2020, the Board asked to be updated on their progress in 12 months.
- 3.2 To accompany the pledges a video has been produced to bring the pledges and plans to life.
- 3.3 The 10 Pledges and the underlying Energy and Water Plans are closely linked to the economic recovery and future prosperity of the City Region.
- 3.4 The Greater Brighton Economic Board and the Greater Brighton Infrastructure Panel are well established and regionally recognised bodies which offer local leadership on a number of work strands that are pushing the city region towards a low carbon/post carbon economy. The overarching partnerships with local authorities, further and higher education partners, business, economic partnerships provide an effective showcase with insight into a variety of issues.
- 3.5 The Infrastructure Panel brings together technical experts and infrastructure providers and there is some substantive background work already completed, including **The Greater Brighton Energy and Water Plans** which were developed by the Infrastructure Panel with the aim of unlocking sustainable growth.
- 3.6 The Energy Plan identifies proposals to accelerate the delivery of energy projects that will boost resilience and security and at the same time help reduce carbon emissions to zero.
- 3.7 The Water Plan builds on work around the water environment that's already in progress across a number of organisations to set out opportunities to address ongoing challenges in new, innovative ways, yielding much increased benefits

for the local area, compared to current, 'conventional' approaches. The intention is to move new building development towards 'water neutrality.'

3.8 Substantive next steps are being progressed including:

- **Blue/Green Investment Plan** - an overall strategy and pipeline of projects in readiness to pitch for investment. This Investment Plan will encapsulate all of the work being done at a city region level to move towards a net-zero economy, and the investment – both public and private – necessary to drive that transition. As such, Blue/Green Investment Plan will be the main strategic guide to the future implementation of the GB10 Pledges.
- **Homes Retrofit Task Force** – joining forces to establish good practice and efficiencies in improving social housing energy efficiency
- **Sussex Bay Project and Sussex Kelp Restoration Project** – focusing on mechanisms for blue carbon and blended finance
- **Sussex Kelp Restoration Project** – focus on science and evidence for benefits for carbon and biodiversity
- **Hydrogen Sussex** – developing a hydrogen economy across Greater Brighton
- **Lobbying** – a number of areas are identified where Greater Brighton could lobby to enable and facilitate the environmental pledges:
 - o Development of carbon codes beyond current woodland & peatland (including blue carbon)
 - o Champion delivery of robust local plan policies that support the restoration of nature (e.g. through delivery of SUDS) in line with current and emerging environmental legislation.
 - o Tighter water and energy efficiency standards in new homes and to champion retrofitting
- Audits of corporate and commercial buildings to support programmes of energy efficiency and bidding for funds.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

4.1 Prior to COP26, this is a timely update to showcase progress made across the city region on climate action.

4.2 The 10 Pledges have formed an excellent platform for joint work between Greater Brighton members. The 'next steps' actions highlight a range of practical actions that GB members individually and together are taking forward.

5. COMMUNITY ENGAGEMENT & CONSULTATION

5.1 None required.

6. CONCLUSION

6.1 The 10 Pledges on the Environment have supported Board members in carrying forward their own actions and targets on climate change. Progress

also demonstrates that Greater Brighton is developing leadership and capacity on a range of climate actions.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 There are no direct financial implications resulting from this report, however, the Board will support future actions needed to take the Pledges forward in the next year should they arise. This may include exploring investment and funding opportunities.

Finance Officer Consulted: Rob Allen

Date: 04/10/21

Legal Implications:

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

Lawyer Consulted: Joanne Dunyaglo

Date: 04/10/21

SUPPORTING DOCUMENTATION

Appendices:

1. 10 Pledges on the Environment – Update October 2021
2. Developing new solutions for tackling climate change: some examples from University of Sussex

APPENDIX 1 - 10 Pledges on the Environment – Update October 2021

1. **Kelp:** backing a scheme to introduce a carbon capturing kelp forest off the Sussex coast

Key achievements	<p>Sussex Nearshore Trawling Byelaw confirmed & permanent (March 21).</p> <p>Sussex Kelp Restoration Project moving at pace with a focus on science & evidence underpinning benefits (carbon and beyond).</p> <p>Sussex Bay Project moving at pace with a focus on mechanisms for delivering blue carbon and blended finance.</p> <p>Sussex Nature Partnership facilitating a number of projects across GB area focused on nature recovery to deliver multiple benefits</p>
Next steps	GB to use collective voice to push government for carbon codes beyond current woodland & peatland (including blue carbon)

2. **Water Recycling:** partnering projects to introduce recycled water into new homes

Key Achievements	<p>Southern Water/South East Water project exploring water recycling from Peacehaven wastewater treatment works to Barcombe/ Arlington reservoirs.</p> <p>Southern Water progressing strategic solutions in wider region to blend large scale recycled water with raw water to reduce the pressure on sensitive ecological sites (chalk rivers).</p> <p>Crawley Water neutrality study published, that explores how to enable development whilst managing demand for water and environmental impacts. Water recycling forms a part of the package of measures proposed.</p>
------------------	---

3. **Zero Emission Fleets:** committing to phasing out diesel cars, refuse trucks, vans

Arun DC	Expects to have EVCPs at a number of ADC staff buildings installed by April 2022. Once the infrastructure is in place, the Council's fleet will transition to electric vehicles for cars and small vans.
Adur & Worthing Councils	AWC have installed electric vehicle chargers at Commerce Way depot and purchased 3 electric vehicles for council operations, with plans to increase the size of low carbon fleet as further vehicles replaced.

BHCC	<p>A strategy is being developed to transition to a zero-carbon fleet by 2030, replacing vehicles as leases are renewed. Currently 25 vehicles are electric (>5% of the fleet) and the council has just taken delivery of an electric refuse vehicle.</p> <p>The Housing Repairs and Maintenance service have taken on a new fleet which includes some electric vehicles, and EV chargers are installed at the housing centre.</p> <p>Hydrogen options are being considered for larger vehicles such as refuse trucks.</p>
Crawley BC	<p>The Decarbonisation Action Plan in response to the Climate Emergency declaration will include proposals to switch to low carbon vehicles across the Borough's fleet as soon as possible.</p>
GB Met	<p>The College has a small fleet of minibuses and vans and is working towards replacing existing vehicles with electric when current leases expire. Currently two electric vans are on order.</p>
UoB	<p>Supporting our wider plans to decarbonise transport and achieve a reduction in local air pollution, in February 2020, 3 EV pool cars entered operation to enable staff to travel emission-free for business trips. With a progressive return to work, usage and demand for these vehicles will be promoted and assessed this year. This, and other supporting data will be used in our plans to achieve net zero transport emissions by updating our travel plan strategy. Our overall intention is to reduce and remove high impact & uncontrolled pollution created by grey fleet business mileage.</p> <p>The next challenge for us is to support the emergent hydrogen economy; the potential to work with our value chain to decarbonise our contractor fleet offers potential that we plan to explore.</p>
UoS	<p>The University's Sustainability Strategy contains a commitment to "make all of the University's vehicle fleet ultralow emissions by 2025 by only procuring and leasing new vehicles that are ULEVs"</p>
SDNPA	<p>Of a fleet of 27 vehicles, 5 are hybrid electric / diesel and 1 is electric. Looking into lower emission alternatives to Land Rovers and pick-up trucks, but this sector is lagging behind the car and van sectors in providing hybrid / electric models.</p>
Ricardo	<p>Ricardo are addressing the UK's EV battery shortage by leveraging its expertise in niche-volume manufacturing, battery research and development (R&D), second life and recycling, complex supply chain management and strategic consultancy.</p> <p>The company is also harnessing its world-renowned expertise in batteries to explore opportunities to minimise the environmental impact of battery-pack manufacture through 'second life processing' and recycling of core elements from construction. This should help to 'level up' the UK supply chain in critical electric-vehicle components to</p>

	support manufacturers producing fewer than 10,000 electrified vehicles per year. Ricardo's future manufacturing strategy is very much aligned to this emerging need for world-leading electrified vehicle components.
Ricardo	A cleaner fuel source feeding directly into rail operations: Ricardo is part of a consortium aiming to build and connect solar electricity generation directly to the railway network to provide zero-carbon power cheaper than from the grid and deliver as much as 10% of the UK Southern Region's rail power needs. Founded by climate charities 'Possible' and 'Community Energy South', Riding Sunbeams has a vision to power railways with unsubsidised, direct-wire renewable generation while delivering positive social impact to line-side communities. Direct supply of solar power to rail traction systems has significant potential for metros, trams and railways in the UK and around the world. Ricardo has been a partner working closely with Riding Sunbeams since 2019 on solutions for systems at each stage of the development of the proposition.

4. **EV Charging Points:** supporting a huge increase in electric vehicle charging points.

WSSC, Districts & Boroughs	West Sussex County Council and District and Borough Councils, made a decision in August 2021 to award a contract with a company to install, operate and maintain a West Sussex county-wide EV Charge Point network. This will start in November 2021 and involve installing charge points over 15 years to all areas of West Sussex, including Arun, Adur, Crawley, Mid-Sussex, and Worthing. First EVCPs expected to be installed by April 2022.
BHCC	<p>200 lamp-post chargers have been installed. By March 2022 we expect to have 100 exclusive lamp-post recharging bays.</p> <p>The replacement and upgrading of existing fast chargers is complete, with 58 exclusive fast recharging bays installed and operational.</p> <p>Installation of 3 on-street rapid taxi hubs with 18 rapid charging bays (including 6 for public use) has been completed and the charge points are now operational.</p> <p>BHCC is seeing a steady increase in monthly usage as more public charge points come online. The government recently announced that further funding will be made available which will allow for further funding bids for chargers to be submitted this financial year.</p> <p>Planning requirement for 10% parking spaces in new developments to have EV chargers</p>

Crawley BC	A specific commitment is included in Crawley's new Local Plan which requires new development to meet the anticipated demand for Electrical Vehicle (EV) Charging Infrastructure. Provision of EV charging infrastructure in Crawley is further supported by West Sussex County Council's 2019 'Guidance on Parking in New Developments'.
Lewes	Procurement due to start September 2021 for LDC estate EVCPs
GB Met	Installing a charging point at our West Durrington campus and investigating the potential for further charging points at other sites. These will use electricity generated by solar PV panels installed on-site by Brighton Energy Coop.
UoB	Rollout of electric vehicle charge points (EVCPs) has gone from strength to strength, increasing from eight to 63 in one year, following 55 new charge-points now installed at our Moulsecoomb campus multi-story car park. Plans to extend this by a further 50 charge points will be reviewed in 2021. More widely, the regeneration of the Moulsecoomb area through our £300m Big Build programme has enabled us to redesign the community streetscape to promote and prioritise active travel by foot and by bike.
UoS	Sustainability strategy commits the University to "begin to invest in replacing priority fossil fuel dependent infrastructure with lower carbon alternatives by December 2026, with a first step of producing feasibility studies in a number of areas including upgrading electric vehicle, scooter and bike charging infrastructure."
SDNPA	Owns one public charging point, a 50kWh unit

5. Rewilding: supporting an increase in natural landscapes and rain garden projects

Key achievements	<p>The Aquifer partnership's Rainscape Campaign – Brighton's first schools raingarden in progress (Moulscoomb Primary).</p> <p>Sussex Nature Partnership established a Local Authority Network to support Environment Bill readiness (nature recovery networks, biodiversity net gain etc) and share best practice around green space valuation and innovative investment.</p> <p>South Downs National Park Authority launched their 'ReNature' nature recovery campaign.</p> <p>Organisations such as BHCC and Southern Water developing land management strategies to help achieve net zero and other commitments</p>
------------------	---

Next steps	GB to champion delivery of robust local plan policies that support the restoration of nature (e.g. through delivery of SUDS) in line with current and emerging environmental legislation.

6. Home Visits: supporting Southern Water’s 50,000 water and energy efficiency home visits

Key achievements	Adaptation during Covid - home visits had to evolve and water companies now offering virtual home visits. Household water use across the South East has risen as more people are working from home so WaCo’s have had to adapt and react quickly.
Next steps	GB continue to use collective voice to push for tighter water and energy efficiency standards in new homes and to champion retrofitting

7. Low Carbon Heating: rolling out schemes to replace oil home heating with electric and other low carbon fuels

Adur & Worthing Councils	<p>The Worthing Heat Network project continues, with two rounds of HNIP funding secured in the past year to enable the project to develop a bid to HNIP. This additional legal and technical work allowed a HNIP bid to be submitted in April for significant capital funding for the commercialisation and construction phases of the project. A concessionaire contract is expected to be let in 2022.</p> <p>Public Sector Decarbonisation Scheme funding has been secured to deliver two large heat pump projects at Sheltered Housing sites that will remove gas heating from over 50 homes. A bi-valent heating system will also be installed at the Shoreham Centre.</p> <p>In total, PSDS and Low Carbon Skills funding should deliver a 5% reduction in the councils' carbon emissions in one year.</p>
BHCC	Currently scoping out the next contract for heating and hot water provision in council-owned housing, that will support a transition away from gas over the next 10-15 years. Installed some air-source heat pumps in council housing over the last year.
Crawley BC	<p>Crawley Homes working on plan to decarbonise social housing and working with Net Zero collective to develop deep retrofit plans progressing with trial of initially 10 house archetypes that will inform blueprint for decarbonisation for whole housing stock.</p> <p>Crawley Town Centre District Heat Network is currently under construction, due for completion in Feb 2022, which will contribute 35%</p>

	carbon reduction on BAU. Connected to three social housing blocks (approx. 300 units) and the new Civic Centre and commercial offices.
SDNPA	<p>Currently supporting the development of a Community Renewables Pathway for the National Park Area. As a pilot, SDNPA supported 5 community groups/rural parishes to develop plans for their area and look at funding opportunities. A plan is being developed on how this pilot can be rolled out across the National Park as a whole.</p> <p>We have started a project supporting the farming sector to understand their carbon footprint and support rapid transition to low carbon. This will be delivered through working with the Farm Cluster groups across the National Park.</p>
UoB	<p>Setting the standard and demonstrating what is possible is key to a creating a future vision for our students and staff. Reflecting sustainability as one of our four core values, we've achieved the BREEAM 'Excellent' Standard for sustainable design and construction at our £300m campus development at Moulseccomb. This approach reflects our ambitions for delivering buildings fit for the future, as outlined in a forthcoming updated Estates strategy. Decarbonisation of both power and heat is a key priority.</p> <p>Building on our work on the innovative thermal energy storage system to provide low-carbon heating and cooling, we shall undertake a feasibility and options approach to retrofit our campus buildings with low and zero carbon heating, including new local heat networks. This will be undertaken with the intention to develop local expertise and provide experience and work opportunities for our students.</p>
UoS	Committed to beginning a feasibility study on the replacement of our Combined Heat and Power Plant with a low carbon alternative by December 2021
OVESCO	The CommuniHeat project plans to take the parish of Barcombe off oil and switch to electric heating. The project delivery partners are OVESCO, Community Energy South, Buro Happold and UK Power Networks. https://communiheat.org/

8. **Public Buildings:** reducing energy use by 50 per cent by 2030

Adur & Worthing Councils	<p>Nearly £2m of Public Sector Decarbonisation Scheme funding has been secured to deliver two large heat pump projects at Sheltered Housing sites that will remove gas heating from over 50 homes and a bi-valent heating system will also be installed at the Shoreham Centre.</p> <p>Additional energy efficiency measures will be installed in Civic Buildings in Worthing as well as 6 solar PV arrays on corporate buildings.</p>
--------------------------	--

	In total, PSDS and Low Carbon Skills funding should reduce the councils' carbon emissions by over 5% in one year.
Arun DC	Currently implementing a carbon audit for our Scope 1, 2 and 3 emissions. The audits for the main corporate buildings will develop a road map to help them get to net zero.
BHCC	<p>Solar PV installations with a peak capacity of 330kW were commissioned across the corporate portfolio in Spring 2021, producing 200mWh of renewable electricity in the first five months of operation and saving around 50 tonnes of CO₂. An additional tranche of Solar PV arrays with a peak capacity of 500kW are planned to be installed at the tail end of 2021/22, with feasibility & financial appraisals currently being produced.</p> <p>Consultants were commissioned to produce a pilot of energy audits to provide a pipeline of feasible efficiency projects for future investment or to take advantage of any available external grant funding. Additional funding was awarded through the Low Carbon Skills Fund in September 2021, to secure consultants to carry out remaining efficiency audits across corporate & school sites. The findings from these studies will be used to form a Heat Decarbonisation plan and a pipeline of feasible efficiency measures focussing on a 'Whole Building' approach.</p>
Crawley BC	New Town Hall being constructed, connected to District Heating Network, to BREEAM Excellent standard; due for completion Spring 2022
GB Met	<p>Solar PV has been installed at our Pelham, East Brighton, West Durrington and Shoreham campuses in conjunction with Brighton Energy. This will provide power for our sites with surplus returned to the main network.</p> <p>We have submitted a bid for significant capital funding to improve the performance of Pelham Tower by undertaking work to reroof, re-glaze and clad the building, reducing energy consumption.</p>
UoB	<p>Building on our work on low carbon buildings we are one of the top-10 UK universities for solar power, and our 1500 solar panels generate over 445,000kWh per year - equivalent to energy used in 150 homes.</p> <p>New innovative partnership approaches with Brighton Energy Cooperative have overcome financial and technical barriers to implementation with our demonstration of solar-powered electric vehicle charge points at Varley Park student halls of residence.</p>
UoS	The Sustainability Strategy commits to improving the energy efficiency of our estate. We will undertake an initial high-level audit of the energy efficiency of all of our buildings to identify the most cost-effective ways

	of reducing energy consumption by December 2021. We will then take these findings to prioritise a more detailed audit of the 20% of the most poorly performing buildings by 2023 and complete a detailed investment opportunity analysis of the entire estate by 2030. We are currently undertaking the first round of these audits – including the auditing of our library, which is a core public building as our special collections are accessible to anyone in the community.
SDNPA	<p>Roof-mounted PV panels generate approx. 7000 kWh p.a.</p> <p>Submitting a Planning application to replace a biomass boiler in the Hall with air source heat pumps. This system would still require a gas back-up but the gas would be used a lot less than before.</p> <p>Other measures include a full refit of the lighting to LED units; Aquatron movement-detection controls on water use; and a Building Management System to monitor and control energy consumption.</p>
OVESCO	OVESCO is in the process of taking a Solar Park of approximately 16mW through the planning process. The site is located in Lewes District and has secured development land and a grid offer. There is potential for site to sell electricity via PPA to a local off-taker Q4 2022
Next steps	<p>Local authorities are planning audits of corporate and commercial buildings to support programmes of energy efficiency and bidding for funds.</p> <p>Greater South East Energy Hub is supporting local authorities to bid for government decarbonisation funds.</p>

9. **Innovation:** establishing an Innovation Forum to share latest research and best practice

Key Achievements	<p>Sussex Innovation Forum (UoS) established with Green Growth Platform business services (UoB) to explore innovative approaches to decarbonisation of infrastructure.</p> <p>Innovation Ecosystem Development Group, chaired by UoB, is exploring ways to support the use of economic innovation to support the GB pledges.</p> <p>UoB and Green Growth Platform convened a workshop to develop science and practitioner led project(s) to advance knowledge and practice for the restoration and management of wetlands and coastal habitats, in order to deliver benefits in terms of carbon storage, biodiversity gains and other eco systems services.</p> <p>Extensive programme of research to advance Pledges 1-10 under way - see list of research projects at Appendix 2</p>
------------------	--

	UoB is the research lead for the GBEB Retrofit Taskforce supporting the decarbonisation of social housing stock (Phase 1).
Next steps	<p>Academic-led collaboration between both universities to convene key GBEB decision-makers and scope out a Green Blueprint (ie a route map) for becoming a net zero city region, drawing on developments and learning to date across all other GBEB pledges and plans.</p> <p>The Green Blueprint will set out what changes need to be made, by when, who is responsible, likely costs, dependencies, consequences and risks. It will serve as a guide for major investment planning, policy change and organisational action.</p>

10. **Lobby:** using Greater Brighton’s powerful voice to lobby government for investment

At the Greater Brighton Economic Board meeting in July 2021, the Board agreed to the host a regional climate summit and to develop a net-zero innovation led Blue/Green Investment Plan. Both were identified as opportunities to be leaders in the UK’s green industrial revolution, to lobby government and to attract investment to accelerate the transition to net zero.

These pieces of work demonstrates that Greater Brighton (a unique sub region which includes a small city, rural communities, deprived coastal areas, a National Park and a UNESCO Biosphere) can amplify a coherent voice and call for ongoing discussions with government and negotiate on funding. This Blue/Green Investment Plan will include a pipeline of investment projects – showcasing the work taking place and revealing our ambitious next steps – to take the form of a ‘Pitch Document’.

The Blue/Green Investment Plan would be the overall strategy and each of the projects in the pipeline would have an outline business case in readiness to pitch for investment. The main benefit from this work will be to shape the thinking of local government, business partners and the LEP into how they approach a post-carbon economy for the area. Once delivered, this pitch document can be communicated to government to drive government interest in the activities of the region leading to investment.

**Appendix 2 - Developing new solutions for tackling climate change:
some examples from University of Sussex**

Innovation	Academic lead/ research group	Outline	GBEB Pledges
Electric vehicle battery developments	Prof Peter Kruger Sussex Programme for Quantum Research (SPQR)	<ul style="list-style-type: none"> ▪ Just completed: a new quantum sensor commercial battery imaging system co-developed with local green energy start-up, CDO2, unveiled at low carbon vehicle technology event Cenex-LCV (22-23 September 2021). ▪ Under development: Safer more efficient batteries for airline industry 	3, 4 & 9
Energy demand & infrastructure planning	Profs Tim Foxtan, Steven Sorrell, Dr Mari Matiskaninen Dr Ralitsa Hiteva Centre for Research into Energy Demand Solutions (CREDS)	Consortium researching into the changes in energy demand needed for the transition to a secure and affordable, low carbon energy system and the implications for infrastructure planning. Live project: Sussex University-sponsored programme of Innovation Forums on tackling aspects of climate change for local stakeholders.	4, 7, 8 & 9
Kelp	Dr Mika Peck	Expert in the conservation of tropical environments and development of new tools to monitor the state of the environment, from tropical rainforest to reefs. Live project: Sussex University-sponsored kelp sample collection (with University of Brighton) and evaluation to produce a roadmap for kelp farming in Sussex Bay area.	1, 3 & 9

Net zero neighbourhoods	Dr Marie Claire Brisbois & Dr Donal Brown	<p>Experts in domestic energy policy. Live projects:</p> <ul style="list-style-type: none"> ▪ Improving energy efficiency in private rented accommodation, working with the UoS student accommodation service; stakeholder event planned in Oct / Nov (incl. landlords, letting agencies, BHCC private housing team and Sussex Student Lettings) to expand the project ▪ Analysing EPC and HMO data to correlate relationship between housing condition and landlord type ▪ Consortium with Glasgow & Leeds to understand consumer behaviour in energy choices. 	3 & 7
Improving water pump and domestic appliance efficiency	Dr Esra Sorguven, Thermo-fluid Mechanics Research Centre	<p>Live project to improve energy efficiency of water pumps through novel flow measurement techniques (Sussex funded project, working with Southern Water)</p> <p>Several live projects to improve the design and manufacturing of domestic appliances which use c 2.5% of the UK's energy consumption and generate £7bn in annual revenue – with Beko; Arcelik & AIRONN.</p>	2, 3 & 9
Hydrogen Engineering expertise	<p>Dr Spyros Skarvelis-Kazakos</p> <p>Dynamics, Control and Vehicle Research</p> <p>Dr Fan Zhang</p>	<p>Expert in hydrogen-related technologies and a member of the Supergen H2FC Science Board (http://www.h2fcsupergen.com/wp-content/uploads/2019/01/UK-H2FC-Capability-Document.pdf - see p.90).</p> <p>Smart grids: His current focus is on hydrogen as a multiple energy carrier optimisation and on increasing renewable energy capacity by improving electricity grid reliability and controllability (thus reducing the impacts of the uncertainty of renewables).</p> <p>Expert in hydrogen embrittlement of duplex stainless steel: Hydrogen embrittlement is a widely known phenomenon in high strength materials that are responsible for subcritical crack growth in material, fracture initiation and catastrophic failure with subsequent loss in mechanical properties such as ductility, toughness and strength. Hydrogen energy systems are reliant on the production, transportation, storage, and use of gaseous hydrogen. The safety, durability, performance and economic operation of these systems is challenged by the hydrogen embrittlement of the materials. Fan has the expertise required to assess safety and materials efficiency in a demonstration project.</p>	3, 7 & 9

	Dr Kun Liang Prof Julian Dunne	<p>Expert in hydrogen laminar flame measurement and engine performance with addition of hydrogen. Recently he has some work on cryogenics systems which can re-liquify hydrogen if there is boil-off gas in the charging point. Kun has the expertise required for engine performance measurements and modelling hydrogen combustion in IC engines, as well as similar measurements and modelling in CHP.</p> <p>Developed new patented technologies at Sussex for free-piston engines offering electrically-controlled VCR (variable compression ratio) needed for hydrogen or ammonia combustion in internal combustion (IC) engines. Free-piston engines are being seriously considered for hybrid electric powertrains, either in series propulsion or as a range extender.</p>	
Zero waste RFID tags using new nanomaterials	Prof Alan Dalton Materials Physics Group	Commercial work with business partner AMD to develop a number of graphene based nanomaterials which are metal-free and more ecologically-friendly. Current developing an alternative metal-free radio-frequency identification tag for use by supermarkets to track products with major supermarket chain.	3 & 9
Vehicle to Grid optimisation	Dr Arash Moradinagade-Dizkah Dynamics, Control and Vehicle Research	<p>Live project:</p> <ul style="list-style-type: none"> ▪ Optimisation and control, energy efficient control allocation, vehicle to grid and smart grids 	3, 4 & 9
Improved efficiency of current combustion engines	Profs Julian Dunne & Peter Fussey Dynamics, Control and Vehicle Research	<p>Live projects:</p> <ul style="list-style-type: none"> ▪ Optimised Resonating Free Piston Generator ▪ Evaporative Cooling of Internal Combustion Engines - with Ricardo. <p>Technology available to be licensed: High Energy Density Power Generator.</p>	3 & 9

Renewable Power generation	Prof Martin Rose	Expert in renewable power generation – urban wind and wave. Live project to design wind powered car “Sussex Power Storm”	3 & 9
Future Refrigeration: ammonia linear compressor	Dr Kun Liang	International partnership to investigate future refrigeration systems using a novel oil-free linear compressor and ammonia as refrigerant. The benefits of such systems are zero ozone depletion potential (ODP), zero global warming potential (GWP), high efficiency and low cost Live Sussex University-sponsored project to support linear technologies including development of Stirling engine for electric vehicle range extension	3 & 9 3, 4 & 9
Renewable energy from waste	Dr Mark Puttock-Brown	Experimental and numerical investigation of heat transfer and fluid dynamics of rotating cavities in gas turbine secondary air systems working with partner GE Aviation Numerical design of radial turbines for waste heat recovery utilising organic working fluids	3 & 9

Appendix 3 – Alignment of academic expertise to GB10 pledges: some examples from University of Brighton

Elements of the University of Brighton’s contribution to the GB10 pledges are incorporated in the main paper. This appendix provides signposts to additional information on core expertise relevant to the pledges and examples of recent work and collaborations. This is not intended to be a definitive list and further detail can be provided as activity relating to the pledges progresses.

GB Pledge	Leading academic expertise	Examples of recent work and collaborations
1: Kelp	Dr Ray Ward, Centre for Aquatic Environments	<ul style="list-style-type: none"> - Natural England report on carbon sequestration and storage in aquatic habitats including kelp forests - Member of the scientific advisory panel for the Help Our Kelp campaign
2: Water recycling	Professor James Ebdon and Dr Ian Mayor-Smith, Environment and Public Health Research & Enterprise Group	<ul style="list-style-type: none"> - Collaborative project with Southern Water on water reuse strategies for the South East
3: Zero emission fleets	Dr Penny Atkins, Advanced Engineering Centre Professor Rob Morgan, Advanced Engineering Centre	<ul style="list-style-type: none"> - Report on Hydrogen engines’ role in decarbonising the heavy duty sector - Hydrogen engine prototype testing with Ricardo - Co-development of the near zero-emission recuperated split-cycle engine with Dolphin N2
7: Low carbon heating/8: Public buildings	Professor Marco Marengo & Dr Marco Picco, Advanced Engineering Centre Incoming Professor of Sustainable Construction Professor Mohammed Arif	Spin-out providing building energy assessments during planning stages

	Duncan Baker-Brown	Brownfield development, modular building and associated sustainable building practices. Sustainable building design, circular economy
--	--------------------	--

Subject:	Greater Brighton Investment Programme – Progress Update		
Date of Meeting:	19 October 2021		
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 20 July 2021.
- 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 July 2021 to 30 September 2021.
- 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 450,000m² of employment floor-space. Current active projects are listed below with a summary of progress since the last update.

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

Design team still on hold to allow for completion of all necessary survey work. Commissioning of fire compartmentation is being sought via existing partnership, following lack of interest at tendering stage. Design process will recommence once this has been realised.

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

The continuing focus of Digital Catapult Brighton is the 5G Festival - a DCMS-supported programme to develop emerging technologies to support the production, distribution and consumption of music in new ways. An additional strand of the project called "Alternative Stages" was launched in the previous period. Its goal is to help smaller labels, studios and venues in the music industry commercially benefit from virtual production and distribution technologies and from aligned regional developments including the Research & Innovation Fibre Ring. Work continues on the technical development of various aspects of this project including distributed live and as-live music concerts, virtual versions of venues (including Brighton Dome), and enhanced fan experiences. A series of workshops for the regional music industry has been designed and will commence in October.

In last period we also began a strategic review of DCB in order to reflect on and respond to the recent Parliamentary Report on Catapults. This report requires us to ensure that we align the national innovation priorities with regional strengths, needs and opportunities.

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

Further substantial progress has been made on both the office the office block and The Dance Space (the final 2 buildings to be completed) as well as offsite and onsite public realm works.

3.1.4 Plus X (Brighton) - £7.7m

Plus X remained operational and continued to grow membership. Plus X signed an agreement with a cafe provider to operate the ground floor café. The café, which opened in August, provides locally sourced and nutritious food to members and visitors. The Brighton Research Innovation Technology Exchange programme for ambitious and established businesses primarily based in the Coast to Capital Local Enterprise Partnership region continued. Other elements of the comprehensive redevelopment reached an advanced stage, with several buildings at or nearing completion. The first two residential blocks are due for completion by the end of 2021, and external works to other residential blocks continues. The University of Brighton's adjacent development also progressed well. The new student halls on the Mithras House site are due for completion in September 2021. The University's new academic building, Elm House, was completed and was handed over to the University. Construction of the pedestrian bridge spanning the Lewes Road has begun and is due for completion in the early part of 2022.

3.1.5 Valley Gardens – Phase 3 (Brighton) - £8.0m

There has been no further update since last meeting and the last position is as follows:

The third public consultation exercise for Valley Gardens Phase 3 has completed in late 2020, which will inform the detailed design stage.

Following a tendering process that completed in late 2020 through the council's new Transport Professional Services Framework the next stage of the scheme design commenced in January 2021.

It is now planned for the detailed design of the scheme and the construction contract procurement will be completed by end of this calendar year.

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

Flood wall construction has been delayed due to further flood water modelling. Work is expected to start in Winter 2021 on the new flood defence wall.

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

See 4.13 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:

Following the grant of planning permission in March 2020 Mosaic Capital choose to market the scheme for sale. A number of challenges have been identified with the consented scheme which rendered it undeliverable and unviable. To prevent recurring and sustained market failure on the site Worthing Borough Council stepped in and completed the purchase of the 1.47ha site on 23rd August 2021 and will bring forward a new development strategy for the site.

3.2.2 Union Place:

Following the grant of planning permission Worthing Borough Council along with partner LCR have commenced the marketing of the site in June 2021. The review and shortlisting of developers will take place in October and a preferred developer contracted by Christmas 2021

3.2.3 Decoy Farm (Worthing) - £4.8m

There has been no further update since the last meeting and the last position is as follows:

Remediation of the landfill completed as at 26 March 2021.
The Phase 1 output to remediate Decoy Farm and bring 7 hectares of land back into use has been achieved. Full use of Local Growth Funding has enabled the site to be unlocked, ready for commercial development.
Full use of Coast to Capital Local Growth Funding achieved by the 31st March 2021 deadline.

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

Housing and infrastructure development has continued at pace with a number of units completed and occupied on the site.

Work is due to commence on the A27 roundabout in Autumn 2021 for completion in late 2022.

Ikea announced that they will not continue with their proposed new store and that they will market the site for a suitable development in September 2021

3.2.5 Growth Location (Burgess Hill) - £14.9m

Town Centre Regeneration: Completion of the S106 agreement and planning permission for the redevelopment of the Martlets Shopping Centre was issued on the 2nd July.

Northern Arc: Work is continuing on site with housebuilder Countryside Properties. Work on both the Eastern Bridge and Link Road and the Western Link Road is set to continue, with the whole on these links scheduled for completion by the end of 2021. Homes England progressing the feasibility for the first primary school on the site. Pre-application discussions have commenced for secondary school on site. Planning application has now been received for the pedestrian and cycle bridge that will link Freeks Farm with the eastern neighbourhood centre.

A feasibility study is being progressed for the Centre for Community Sports which is to be delivered on the site.

Place and Connectivity: Work continues delivery of the first of the phase 1 schemes including public art and other public realm improvements to the underpass at Wivelsfield Railway station. Detailed design work continues for highway improvements at Burgess Hill and Wivelsfield Stations, public realm improvements for Church Walk / Church Road, and access & connectivity improvements for Victoria Business Park. Delivery continues on Green Link (70% complete, 5km/7km) and Green Circle routes (90% complete, 4km/4.35km).

A2300 corridor improvements: Construction began in spring 2020 and is progressing to programme (Northern carriageway completion date anticipated for Summer 2021; both carriageways anticipated to be completed by Winter 2021).

Employment space, The Hub: The second phase of development (a 5,000m² warehouse for Roche Diagnostics) was completed in early February. Outline planning permission for the remaining 40,000m² has been approved, and issued. **Digital Infrastructure:** Works to implement the Digital Infrastructure across and around Burgess Hill, including a southern link to Brighton and a northern link via Horsham to Crawley, are well progressed. The Local Full Fibre Network (LFFN) project has now been delivered totalling 15km of dark fibre and the Burgess Hill Fibre Exchange. Customer Enquiries are now being received and first customer connections expected soon.

One public estate (OPE) 7: The Brow - redevelopment of an extended Brow site in Burgess Hill will provide enhanced accommodation for the emergency and primary care services and to create space for 440 new homes (led by WSCC). Consultants Faithful and Gould have completed a draft viability study which is currently being reviewed to agree next steps.

Land adjacent to Burgess Hill station - Officers are working with key stakeholders including Network Rail and The Arch Company (the principal land-owner at the site). Review of feasibility and appraisal work commenced April 2021 for completion by October 2021.

Goddards Green Waste-Water Treatment Works: Phase 1 of the project has been completed delivering most of the odour reduction benefits. All the £4m LGF-funding has been spent, alongside the £6.54m HIF grant. The remainder of the project will be funded by private Southern Water investment (£13.6m)

3.2.6 Black Rock /Waterfront (Brighton) - £12.1m Dukes Mound works are nearing completion.

Sea wall works package awarded and starts 11 October.

A short film about the project has been produced [Black Rock rejuvenation \(brighton-hove.gov.uk\)](https://www.brighton-hove.gov.uk/black-rock-rejuvenation)

Engagement with stakeholders continues and direct communications via Blackrockcommunity.com website is ongoing.

The local wildlife site has now been relocated and vegetated shingle is growing well in the new location. 2nd and 3rd phases in the Autumn will use seed plugs from Millennium Seed Bank and original sea kale growth from LWS. A short film to describe this part of the project has been launched on the website [The relocation and expansion of Black Rock's Local Wildlife Site - YouTube](https://www.brighton-hove.gov.uk/black-rock-rejuvenation).

As part of the conservation and required maintenance to the green wall, the council's parks team is going to be carrying out trimming of the lower branches of the fig tree and tying it in to newly installed training wires. This is part of the agreed plan which will look after and maintain the plants on the wall going forward.

This work will support the tree and encourage it to grow up the retaining wall rather than out into the road. There have been some issues with availability of materials (composite decking) and longer lead in times for steel and concrete. Current programme is working well with no major issues reported.

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 Economic Board put forward eight bids, five of which received funding totalling approximately £9.9m. The project updates are as follows:

3.3.1 Adur Civic Centre (Shoreham-By-Sea) - £1.8m

Planning application for phase 2 was submitted by Hyde Housing Group in August 2021 following a delay caused by Covid 19. It is expected to be considered by a planning committee in Autumn 2021 with a view to commencing on site in Spring 2022.

Completion of the 172 homes and business space is expected by April 2024.

3.3.2 Springman House (Lewes) – £2.0m

There has been no further update since the last meeting and the last position is as follows:

Following the purchase of the site by Lewes District Council, plans were drawn up with the East Sussex Fire and Rescue Service Sussex Police and the South East Coast Ambulance Service. NSQL, the majority landowner at the NSQ site, has now sold its land to the developer – Human Nature. In December 2020, the Council's Cabinet agreed heads of terms for the sale of its own land to this same developer in order that it can comprehensively redevelop the site. Human Nature has confirmed that it will submit a new planning application for the NSQ and the Council is now liaising with the developer to understand its plans and timescales for the site, including the fire station.

3.3.3 Railway Quay (Newhaven) - £1.5m

Flood defence works on site now completed and negotiations underway with existing tenant re: relocation. LDC has secured £1.3m from the Getting Building Fund to convert the former UTC building into a maritime and sustainable technology hub, offering education / training space and commercial facilities for SME's. This has been augmented by a commitment of £500k from LDC towards the estimated £1.8m project costs. Lease negotiations with DfE are being finalised and hopeful of taking possession before end of 2021. A final layout plan is being prepared and it is planned to undertake an Expression of Interest process to elicit appropriate commercial partners for the project.

Phase 1 of Railway Quay is now complete, funded through the Towns Fund and CiL to deliver The Sidings - offering new visitor, community and sustainability facilities, including a café and a base for the local gig rowing club. Lease negotiations are being finalised to add an active travel hub and funding has been secured from DfT towards a trial of e-cargo bikes to be based at the site.

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

The Council's appointed Management Contractor, Westridge Construction Limited, has completed remedial works to achieve weatherproof buildings. All structural remedial works to the 200-year-old Corn Exchange timber frame and roofing works have been completed to secure the building envelope. The Studio theatre fibrous plaster ceiling and copper roof require replacement as they have reached the end of their useful lives and have been brought into scope. Finishing and completion works are progressing with the installation of the Corn Exchange oak wall boarding substantially completed. Covid-19 and possibly Brexit appear to be impacting availability of materials with longer delivery times and further delays remain a risk. On site measures including physical distancing, track and trace venue check-in, increased cleaning regime and visitors asked to wear facemasks are continuing. Practical Completion is now anticipated in May 2022.

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 fourth 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. Unallocated LGF Growth Deal Funds of £9.1m were available from June 2019 with 6 bids (totalling £6.248m) being awarded to schemes within the Greater Brighton region, these are shown at paragraph 3.6 above. Future or revised business plans will be reported accordingly within the timescales of the project timetables.

Finance Officer Consulted: Rob Allen, Principal Accountant
Date: 04/10/21

Legal Implications:

7.2 None.

Lawyer Consulted: Joanne Duniyaglo, Senior Property Lawyer
Date: 04/10/21

Equalities Implications:

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

Sustainability Implications:

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

Any Other Significant Implications:

- 7.4 None.

SUPPORTING DOCUMENTATION

Appendices:

Greater Brighton Investment Update Report October 2021

Background Documents:

None



Greater Brighton Economic Board

Investment Programme Update Report

October 2021

Contents

Item		
1	Adur Civic Centre – Shoreham	Page 3
2	Burgess Hill Strategic Growth Programme	Page 4
3	Circus Street- Brighton	Page 6
4	Decoy Farm - Worthing	Page 7
5	Digital Catapult- Brighton	Page 8
6	Black Rock	Page 9
7	Heritage Centre Stage - Brighton	Page 10
8	New England House - Brighton	Page 11
9	New Monks Farm – Shoreham By Sea	Page 12
10	Plus X - Brighton	Page 13
11	Railway Quay - Newhaven	Page 14
12	Springman House - Lewes	Page 15
13	Teville Gate - Worthing	Page 16
14	Union Place - Worthing	Page 17
15	Valley Gardens - Brighton	Page 18
16	Western Harbour Arm – Shoreham-By-Sea	Page 19



Adur Civic Centre – Shoreham



Funding (all years)

Total LGF Funding	£1.71m
Total Public Funding	£0.0m
Total Private Funding	£9.89m
Total Other Funding	£0.00m
Total Funding	£11.60m

Outputs

Phase 1 North Site -30,000sqft of employment space

Phase 2 South Site – 987sqm of employment space and 171 residential units

What happened in the last period?

Planning application for phase 2 was submitted by Hyde Housing Group in August 2021 following a delay caused by Covid 19. It is expected to be considered by a planning committee in Autumn 2021 with a view to commencing on site in Spring 2022.

Target Milestones (Phase 2)

Start on site: Spring 2022

Completion: Completion of the 172 homes and business space is expected by April 2024 (Homes England deadline)

Aims & Objectives

Adur District Council have led on the development of a two phase scheme for the former Council offices in Shoreham. Phase 1 involved the development of a 30,000 sqft (gross) office building which is now complete and let to local business Focus Group following £9.89m of Council investment.

For Phase 2 the Council have identified Hyde Housing as the preferred bidder for the site (Hyde Housing) and are working to finalise contracts. A planning application is anticipated in Spring 2020 for 173 homes (100% affordable in line with Hyde Housing’s strategic partnership with Homes England) and ground floor commercial space.

Key Facts

Delivery Partners: Adur District Council. Willmott Dixon, Hyde Housing Group

Burgess Hill Strategic Growth Programme



Artist's impression

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 grant funding has been secured:

- **£17 million** from the Local Growth Fund (LGF) to support A2300 corridor improvements comprising an upgrade to a 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 Burgess Hill and Wivelsfield railway stations, public realm improvements, and an inter-urban cycle route between Haywards Heath and Burgess Hill.
- **£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 fund and **£2 million** LGF and **£1.6 million** retained business rates to support the implementation of new digital infrastructure for Burgess Hill which in turn will stimulate the market for internet service providers.
- **£165k** from One Public Estate for design and feasibility studies to redevelop 'The Brow' and land adjacent to Burgess Hill Station.
- **£1 million** Access for All funding to improve accessibility at Wivelsfield Station.

Key Facts

Delivery Partners: Mid Sussex District Council, Homes England, West Sussex CC, Burgess Hill Town Council, Coast to Capital, Department of Transport, and developers.

Funding (all years)

LGF Funding	£33.9m
Homes England funding	£370.5m
DCMS & other digital funding	£3.8m
OPE Funding	£165k
Access for All	£1.0m
WSCC Funding	£3.34m
MSDC Funding	£3.69m
Total Public Funding	£416.39m
Total Private Investment	£643.3m
Total Funding	£1,059.7m

Following their acquisition of the Northern Arc land parcels, the Council has an approved Infrastructure Delivery Plan (IDP) with Homes England which confirms an investment of £162m in strategic infrastructure.

Outputs

5,000 new homes, a Science and Technology Park (up to 100,000m² employment space), two business parks, 15,000 new jobs (including construction jobs), a major town centre regeneration (offering retail space, commercial leisure space including a cinema and a bowling alley, a hotel as well as new homes), improvements to the A2300 corridor, a package of public realm and sustainable transport schemes, new schools, increased GP capacity, improved leisure facilities, full-fibre digital infrastructure.

What happened in the last period?

Town Centre Regeneration: Completion of the S106 agreement and planning permission for the redevelopment of the Martlets Shopping Centre was issued on the 2nd July.

Northern Arc: Work is continuing on site with housebuilder Countryside Properties. Work on both the Eastern Bridge and Link Road and the Western Link Road is set to continue, with the whole on these links scheduled for completion by the end of 2021. Homes



England progressing the feasibility for the first primary school on the site. Pre-application discussions have commenced for secondary school on site. Planning application has now been received for the pedestrian and cycle bridge that will link Freeks Farm with the eastern neighbourhood centre.

A feasibility study is being progressed for the Centre for Community Sports which is to be delivered on the site.

Place and Connectivity: Work continues delivery of the first of the phase 1 schemes including public art and other public realm improvements to the underpass at Wivelsfield Railway station. Detailed design work continues for highway improvements at Burgess Hill and Wivelsfield Stations, public realm improvements for Church Walk / Church Road, and access & connectivity improvements for Victoria Business Park. Delivery continues on Green Link (70% complete, 5km/7km) and Green Circle routes (90% complete, 4km/4.35km).

A2300 corridor improvements: Construction began in spring 2020 and is progressing to programme (Northern carriageway completion date anticipated for Summer 2021; both carriageways anticipated to be completed by Winter 2021).

Employment space, The Hub: The second phase of development (a 5,000m² warehouse for Roche Diagnostics) was completed in early February. Outline planning permission for the remaining 40,000m² has been approved, and issued.

Digital Infrastructure: Works to implement the Digital Infrastructure across and around Burgess Hill, including a southern link to Brighton and a northern link via Horsham to Crawley, are well progressed. The Local Full Fibre Network (LFFN) project has now been delivered totalling 15km of dark fibre and the Burgess Hill Fibre Exchange. Customer Enquiries are now being received and first customer connections expected soon.

One public estate (OPE) 7: The Brow - redevelopment of an extended Brow site in Burgess Hill will provide enhanced accommodation for the emergency and primary care services and to create space for 440 new homes (led by WSCC). Consultants Faithful and Gould have completed a draft viability study which is currently being reviewed to agree next steps.

Land adjacent to Burgess Hill station - Officers are working with key stakeholders including Network Rail and The Arch Company (the principal land-owner at the site). Review of feasibility and appraisal work commenced April 2021 for completion by October 2021.

Goddards Green Waste Water Treatment Works: Phase 1 of the project has been completed delivering most of the odour reduction benefits. All the £4m LGF-funding has been spent, alongside the the £6.54m HIF grant. The remainder of the project will be funded by private Southern Water investment (£13.6m)

Target Milestones — Various (project-specific).

Circus Street – Brighton



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.

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 sq ft. office building; 450 student accommodation bed spaces; “The Dance Space” (dance studios, offices, public performance space and HQ for South East Dance); start-up workshops, retail units and restaurant; public realm to include a square and landscaped courtyards.

What happened in the last period?

Further substantial progress has been made on both the office the office block and The Dance Space (the final 2 buildings to be completed) as well as offsite and onsite public realm works.

Target Milestones End Date: October 2021

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 would encourage student and new resident population spending in and around the site and would boost the local economy by more than £10m each year due to a multiplier effect.

The main office building will be a new centre for innovation and enterprise that will maximise the potential for linking the University’s research functions and private organisations that will cohabit in the building. This Innovation Hub will, in turn, create and support fledgling new business in the City and generate opportunities for students, graduates and university staff to work alongside SMEs and larger organisations.

The Dance Space provide a new HQ for South East Dance as well as 3 studios (one for public performances) and office space for other cultural industries. The growing artistic

Decoy Farm – Worthing



Outputs

- **Phase 1:** To remediate the 7 hectare former landfill site, unlocking it for commercial development.
- **Phase 2:** To deliver up to 13,536sqm of employment floorspace by developing new commercial units to meet existing and future industrial demand.

What happened in the last period?

- Since completion of the remediation works in March nothing has happened on the site in terms of works.

Disposal/Development Strategy

- Phase 2 of the development and output to deliver employment floorspace is progressing well.
- A draft Outline Business Case has been prepared.
- Planning consultation events have been held and an outline planning application is in progress.

Target Milestones

No update received

Aims and 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 will boost employment opportunities and economic performance in the entire Coast to Capital LEP region.

Funding (all years)

Total LGF Funding	£4.84m
Total Public Funding	£4.84m
Total Private Funding	£15m
Total Funding	£25m

Key Facts

Delivery Partners: Worthing Borough Council, West Sussex County Council, Private Sector, Coast to Capital LEP.



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?

The continuing focus of Digital Catapult Brighton is the 5G Festival - a DCMS-supported programme to develop emerging technologies to support the production, distribution and consumption of music in new ways. An additional strand of the project called “Alternative Stages” was launched in the previous period. Its goal is to help smaller labels, studios and venues in the music industry commercially benefit from virtual production and distribution technologies and from aligned regional developments including the Research & Innovation Fibre Ring.

Work continues on the technical development of various aspects of this project including distributed live and as-live music concerts, virtual versions of venues (including Brighton Dome), and enhanced fan experiences. A series of workshops for the regional music industry has been designed and will commence in October.

In last period we also began a strategic review of DCB in order to reflect on and respond to the recent Parliamentary Report on Catapults. This report requires us to ensure that we align the national innovation priorities with regional strengths, needs and opportunities.

Target Milestones

Alternative Stages project to commence October 2021

5G Festival delivered – March 2022

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 Digital Catapult Centre Brighton (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.

Key Facts

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

Black Rock - Brighton



also provide much needed improvements for the area in the interim. New infrastructure and a more developable site will be accompanied by temporary events space to support Covid recovery and a new temporary BMX pump track. A new play area and restored Reading room and Temple will also create more of a destination for visitors and residents. Long term development will be governed by a Development Brief which will be progressed during 2021/22.

Key Facts

Delivery Partners: Brighton and Hove City Council Major Projects and Regeneration Team are leading the project.

Funding (all years)

Total LGF Funding	£12.11m - underway
Total Public Funding	£12.611
Total Private Funding	Subject to final Business Case
Total Other Funding	£600k S106
Total Funding	£12.611m

Outputs

A revised economic impact assessment is currently underway to assess final outputs for the redeveloped Black Rock Site under a range of future scenarios. These will be included in the next update.

What happened in the last period?

Dukes Mound works are nearing completion.

Sea wall works package awarded and starts 11 October.

A short film about the project has been produced [Black Rock rejuvenation \(brighton-hove.gov.uk\)](https://blackrockrejuvenation.brighton-hove.gov.uk)

Engagement with stakeholders continues and direct communications via Blackrockcommunity.com website is ongoing.

Aims & Objectives

The scope and outputs for the Waterfront project have now evolved in to two projects, with the agreement of the Local Enterprise Partnership. A revised series of outputs has been agreed for the Black Rock project which focus upon two key phases of enabling (underway) and future permanent development (to be progressed with a target of 2026 for completion). See alternative for summary of Waterfront project (below).

The aim of the project to regenerate the Black Rock site is now underway, with a successful planning application achieved in June 2020 and five works packages at various stages. The first two works packages, to deliver improvements to Dukes Mound junctions and begin work to the new beach boardwalk, have appointed contractors and are nearing completion. The Sea Wall works are now underway and the Marina Link, followed by the works to existing heritage and Kemptown Gardens will begin in autumn 2021.

Completion remains targeted for early summer 2022 when the new event space will open. The Development Brief for the Black Rock site will be developed over the coming months to synchronise with work on the Eastern Seafront Masterplan.

The overall objective of the project is to regenerate the Black Rock site. A package of improvement works will unlock and de-risk the site for a future development, but will

The local wildlife site has now been relocated and vegetated shingle is growing well in the new location. 2nd and 3rd phases in the Autumn will use seed plugs from Millennium Seed Bank and original sea kale growth from LWS. A short film to describe this part of the project has been launched on the website [The relocation and expansion of Black Rock's Local Wildlife Site - YouTube](#).

As part of the conservation and required maintenance to the green wall, the council's parks team is going to be carrying out trimming of the lower branches of the fig tree and tying it in to newly installed training wires. This is part of the agreed plan which will look after and maintain the plants on the wall going forward.

This work will support the tree and encourage it to grow up the retaining wall rather than out into the road. There have been some issues with availability of materials (composite decking) and longer lead in times for steel and concrete. Current programme is working well with no major issues reported.

Target Milestones

- Phased Completion – November 2021 to May 2022

Heritage Centre Stage – Brighton



Funding (all years)

Total LGF Funding	£3.00m
Total Public Funding	£21.70m
Total Private Funding	£5.70m
Total Other Funding	£0.00m
Total Funding	£30.40m

Outputs

Employment: created and/or safeguarded - 337

Businesses assisted: financial and non-financial - 624

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

Carbon reduction 39.961 tonnes of CO₂.

What happened in the last period?

The Council’s appointed Management Contractor, Westridge Construction Limited, has completed remedial works to achieve weatherproof buildings. All structural remedial works to the 200-year-old Corn Exchange timber frame and roofing works have been completed to secure the building envelope. The Studio theatre fibrous plaster ceiling and copper roof require replacement as they have reached the end of their useful lives and have been brought into scope. Finishing and completion works are progressing with the installation of the Corn Exchange oak wall boarding substantially completed. Covid-19 and possibly Brexit appear to be impacting availability of materials with longer delivery times and further delays remain a risk. On site measures including physical distancing, track and trace venue check-in, increased cleaning regime and visitors asked to wear facemasks are continuing. Practical Completion is now anticipated in May 2022.

Target Milestones

End Date: May 2022

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	11.1 million
Total Private Funding	n/a
Total Other Funding	n/a
Total Funding	n/a

Outputs

Upgrade building, including providing a net additional 7,090m² of new employment floor-space. Following the land deal with Legal & General on the adjacent Longley Industrial Estate, some of this City Deal floorspace output will be provided on the Longley site, with the remainder forming part of a proposed extension to New England House.

What happened in the last period?

Design team still on hold to allow for completion of all necessary survey work. Commissioning of fire compartmentation is being sought via existing partnership, following lack of interest at tendering stage. Design process will recommence once this has been realised.

Target Milestones

- Planning application: Late 2021
- Commence works on site: Mid 2023
- End Date: Late 2024.

Aims & Objectives

Upgrade and expand New England House so that it becomes a credible and highly visible hub for Greater Brighton's creative, digital and IT (CDIT) businesses.

Key Facts

New England House (NEH) is a business centre, built by the local authority in the early 1960s to provide workspace for industrial businesses. Over time, it has been subdivided into around 120 units. It is actively marketed as a centre for CDIT businesses and is much in demand for its relatively affordable workspace.

The building is in urgent need of refurbishment – especially its exterior. Under the Greater Brighton City Deal, BHCC was awarded £4.9 million in 2014 towards the refurbishment and expansion of NEH to consolidate its role as a flagship for the city's CDIT sector.

Delivery Partners: Brighton & Hove City Council

New Monks Farm - Shoreham-By-Sea



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 (WSCC) and Adur District Council (ADC).

Funding (all years)

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

Outputs

1. A £150 million capital investment;
2. The delivery of 600 new homes, 30% of which will be affordable;
3. 876 gross new jobs;
4. £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?

- Housing and infrastructure development has continued at pace with a number of units completed and occupied on the site.
- Work is due to commence on the A27 roundabout in Autumn 2021 for completion in late 2022.
- Ikea announced that they will not continue with their proposed new store and that they will market the site for a suitable development in September 2021

Target Milestones

Delivery of New Junction to the A27: December 2022

Completion of Development: December 2028

Plus X – Brighton



Plus X building

Aims & Objectives

The 'Plus X' seven storey innovation hub is a U+I Plc concept, a model they have delivered successfully elsewhere. As a key element of the comprehensive mixed-use redevelopment it provides 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 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	£12m
Total Funding	£19.7m



Outputs

Contractual outputs: 4,910m² of new employment space, 517m² of high specification prototyping labs/workshops, 100 onsite jobs, £5.427m of match funding.

Non-contractual outputs: 200 other jobs, £250,000 follow-on investment, 141 businesses supported.

What happened in the last period?

Plus X remained operational and continued to grow membership. Plus X signed an agreement with a cafe provider to operate the ground floor café. The café, which opened in August, provides locally sourced and nutritious food to members and visitors. The Brighton Research Innovation Technology Exchange programme for ambitious and established businesses primarily based in the Coast to Capital Local Enterprise Partnership region continued. Other elements of the comprehensive redevelopment reached an advanced stage, with several buildings at or nearing completion. The first two residential blocks are due for completion by the end of 2021, and external works to other residential blocks continues. The University of Brighton's adjacent development also progressed well. The new student halls on the Mithras House site are due for completion in September 2021. The University's new academic building, Elm House, was completed and was handed over to the University. Construction of the pedestrian bridge spanning the Lewes Road has begun and is due for completion in the early part of 2022.

Target Milestones – Complete development End Date: Dec. 2022.

Railway Quay - Newhaven



Funding (all years)

Total LGF Funding	£1.5m
Total Public Funding	£800k (so far, mix of TF and CiL)
Total Private Funding	TBC
Total Other Funding	TBC
Total Funding	TBC

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. LDC has secured £1.3m from the Getting Building Fund to convert the former UTC building into a maritime and sustainable technology hub, offering education / training space and commercial facilities for SME's. This has been augmented by a commitment of £500k from LDC towards the estimated £1.8m project costs. Lease negotiations with DfE are being finalised and hopeful of taking possession before end of 2021. A final layout plan is being prepared and it is planned to undertake an Expression of Interest process to elicit appropriate commercial partners for the project.

Phase 1 of Railway Quay is now complete, funded through the Towns Fund and CiL to deliver The Sidings - offering new visitor, community and sustainability facilities, including a café and a base for the local gig rowing club. Lease negotiations are being finalised to add an active travel hub and funding has been secured from DfT towards a trial of e-cargo bikes to be based at the site.

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, 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 blue light facility on the site of Springman House, this project will unlock the 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 new homes and commercial floor-space through the North Street Quarter (NSQ) regeneration scheme, and enable Lewes’ “blue light” services to be co-located.

What happened in the last period?

There has been no update since the last period. Previous update is as follows:

Following the purchase of the site by Lewes District Council, plans were drawn up with the East Sussex Fire and Rescue Service Sussex Police and the South East Coast Ambulance Service. NSQL, the majority landowner at the NSQ site, has now sold its land to the developer – Human Nature. In December 2020, the Council’s Cabinet agreed heads of terms for the sale of its own land to this same developer in order that it can comprehensively redevelop the site. Human Nature has confirmed that it will submit a new planning application for the NSQ and the Council is now liaising with the developer to understand its plans and timescales for the site, including the fire station.

Target Milestones

End Date: To be confirmed, subject to Human Nature’s programme including planning.

Aims & Objectives

The project involves the formation of new fire and ambulance station facilities. A key project aim is to deliver modern new premises for both services.

Key Facts

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

Teville Gate - Worthing



Teville Gate House Construction 12/12/2019

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 freeholders, Mosaic Global Investments (Mosaic) and Hanson Development to develop out the scheme for office, residential and commercial.

Key Facts

Delivery Partners: Worthing Borough Council, Mosaic Global Investments, Coast to Capital LEP, Hanson Developments & HMRC, Homes England

Funding (all years)

Total LGF Funding	£2.09m
Total Public Funding	£2.0m
Total Private Funding	£79m (wider site) £32m (Teville Gate House)
Total Funding	£81.00m

Outputs

(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). 70,000sqft office building at Teville Gate House for HMRC.

What happened in the last period?

- Site acquired by Worthing Borough Council for redevelopment in August 2021

Target Milestones

Autumn/Winter 2021 – revised strategy for the site being developed by landowners.

Union Place - Worthing



Funding

Total LGF Funding	£3.60m
Total Public Funding	£5m
Total Private Funding	£31.4m
Total Other Funding	TBC
Estimated GDV	£70m

Outputs

- 169 - New Homes – 30% affordable
- 610sqm - Commercial Space
- 90 - Guest room Hotel
- 3 /4 Screen – Cinema
- 1072sqm- Flexible Cultural Space
- 245 – Parking spaces

What happened in the last period?

- S106 agreement drafted and formal planning permission issued
- Phase 1 put to market for development partner with deadline of 23rd September.
- Bids being considered and shortlisted for selection.

Target Milestones

- Appoint preferred developer - Autumn 2021
- Detailed planning application expected Spring/Summer 2022

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 entered into a land pooling agreement for the site with partners London and Continental Railways (LCR). The partners have prepared a development strategy for the sites which has been approved at JSC. The development strategy could include direct delivery or selling the consented scheme to a developer.

Key Facts

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

Valley Gardens Phase 3 – 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, accessibility, 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

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 - 63,866m².

Funding (all years)

Total LGF Funding	£6.00m
Total Public Funding	£1.84m
Total Private Funding	£0.0m
Total Other Funding	£0.00m
Total Funding	£7.84m

What happened in the last period?

There has been no update for the quarter July to October 2021. The previous update was as follows:

The third public consultation exercise for Valley Gardens Phase 3 has completed in late 2020, which will inform the detailed design stage.

Following a tendering process that completed in late 2020 through the council's new Transport Professional Services Framework the next stage of the scheme design commenced in January 2021.

It is now planned for the detailed design of the scheme and the construction contract procurement to be completed by end of this calendar year.

Target Milestones

End Date: Autumn 2022

Western Harbour Arm – Shoreham-By-Sea



Proposed scheme

Aims & Objectives

A new flood defence wall and cyclepath to be constructed in Shoreham adjacent to the A259 on Brighton Road where the flood defence is at its most vulnerable point for flooding. ADC purchased a 3.5m strip of land off Sussex Yacht Club through grant funding from Coast 2 Capital LEP. The sale of the land would enable the yacht club to build a new club house and allow the council to demolish the redundant club house where the new flood wall will be located.

Key Facts

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

Funding (all years)

Total LGF Funding:	£3.50m
Total Public Funding:	£1.14m
Total Private Funding:	£0.00m
Total Other Funding:	£0.00m
Total Funding:	£4.64m

Outputs

- Flood defence scheme to protect residents and businesses
- Cycle path
- New yacht club for Shoreham.

What happened in the last period?

- Demolition contract appointed

Target Milestones

- Demolition of redundant Yacht Club October/November 2021
- Commencement of Flood Defence construction Spring 2022
- Completion Autumn 2022