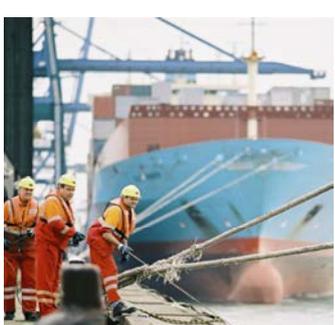
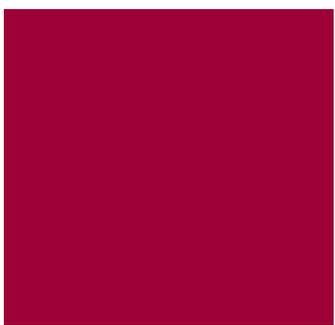
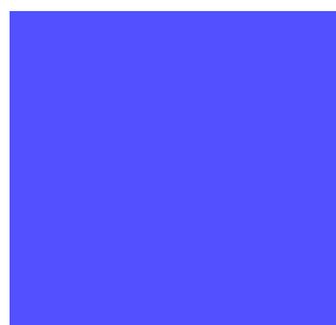


# EAST SUFFOLK GROWTH PLAN

2014 - 2025

working in partnership  
towards a brighter future



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# FOREWORD

East Suffolk enjoys an outstanding quality of life.

Our natural and cultural assets make East Suffolk an exceptional place to live and work.

As Leaders of Suffolk Coastal and Waveney District Councils our aim is to maintain and improve this quality of life whilst encouraging sustainable growth.

The outlook for the future is positive but we cannot take prosperity for granted. We are ambitious for East Suffolk and this growth plan identifies how we will achieve sustainable economic and housing growth through the rest of this decade and into the next.



Cllr Ray Herring  
Leader—Suffolk  
Coastal District  
Council



Cllr Colin Law  
Leader—Waveney  
District Council



# INTRODUCTION

- 1.1 The East Suffolk Growth Group (ESGG) was established in 2013 to provide direction to the task of growing the East Suffolk economy, in response to the local and countywide aspiration to achieve economic growth. The group comprises members and officers of both Suffolk Coastal District Council (SCDC) and Waveney District Council (WDC). Its aspiration is to develop a plan for sustainable economic and housing growth whilst maintaining and enhancing the high quality built and natural environment.
- 1.2 The ESGG is one of five partners that have developed and are now delivering on the Suffolk Growth Strategy (SGS) and Delivery Plan. A number of our objectives for growth will be delivered through the SGS and the purpose of the East Suffolk Growth Plan (ESGP) is to complement, add value and provide a more local focus for these growth ambitions.

- 1.3 The SGS and ESGP share the following priority growth sectors and locations:

- Energy
- Tourism
- Ports & Logistics
- ICT
- Lowestoft & Great Yarmouth Enterprise Zone
- Sizewell
- Greater Ipswich (inc. Martlesham)
- Felixstowe & A14 Corridor

- 1.4 The ESGG and the SGS will also inform the emerging Strategic Economic Plan (SEP) which is being produced by New Anglia Local Enterprise Partnership. The SEP will provide a single coherent growth plan across Norfolk and Suffolk. The importance of this document cannot be underestimated as it will provide the framework for national and European investment in economic development and supporting infrastructure between 2014 and 2025.
- 1.5 The ESGG acknowledges that it cannot achieve economic and housing growth directly but that it has a crucial role to play in creating the right environment for this growth to flourish. These sentiments are echoed in Lord Heseltine's 'No Stone Unturned in Pursuit of Growth' report, which says:

*"Experience indicated that there are some things only government can do to drive growth. There are many areas where government should stand aside completely. But in the vast majority of cases we will only get the very best results for our economy if government, business and local leaders exploit their skills and resources in partnership."*

- 1.6 The ESGP sets out its growth ambitions through the development and enhancement of key sectors and strategic growth locations. These factors are supported by cross-cutting elements such as housing, skills, inward investment, infrastructure investment and the low carbon economy which will facilitate economic expansion across the east Suffolk economy and principally in the key sectors and growth locations. The current Local Plans for both districts provide the context, in terms of the scale and distribution of employment and housing growth, for the identified growth locations.



# VISION

2.1 East Suffolk is a unique place with distinctive economic strengths. It has an unparalleled combination of coastal natural assets in close proximity to the economic powerhouse of the City of London.

2.2 Our vision is that by 2025 East Suffolk will be more prosperous; with more businesses, stronger businesses and more jobs.

We will achieve this vision by:

- Protecting and enhancing our natural coastal assets.
- Strengthening our world-leading businesses and key sectors.
- Making the most of East Suffolk's unique location.

2.3 Our goals are challenging but we will work with county, regional and national partners to achieve them:

- We will create the right conditions to increase the number of jobs in East Suffolk by 10,000: from 104,000 in 2012 to 114,000 in 2025.
- We will create the right conditions to increase the Gross Value Added per person in East Suffolk so that by 2025 the GVA per person is in line with the NALEP average of £21,500 and in excess of the national average of £20,000 per person.
- We will facilitate the creation at least 900 new enterprises by 2025, so that we outperform the national average of 36 enterprises per 1,000 people. (In 2012 there were 8,685 active enterprises in East Suffolk, in line with the national average of 36 per 1,000 people).



## Delivery Plan

2.4 This report sets out the growth ambitions for East Suffolk. Once it has been approved by SCDC and WDC Cabinets in June 2014, a Delivery Plan will be put together to elucidate how these growth aspirations will be achieved.

The East Suffolk Delivery Plan will outline how we will build upon the work we are already doing with our partners , such as:

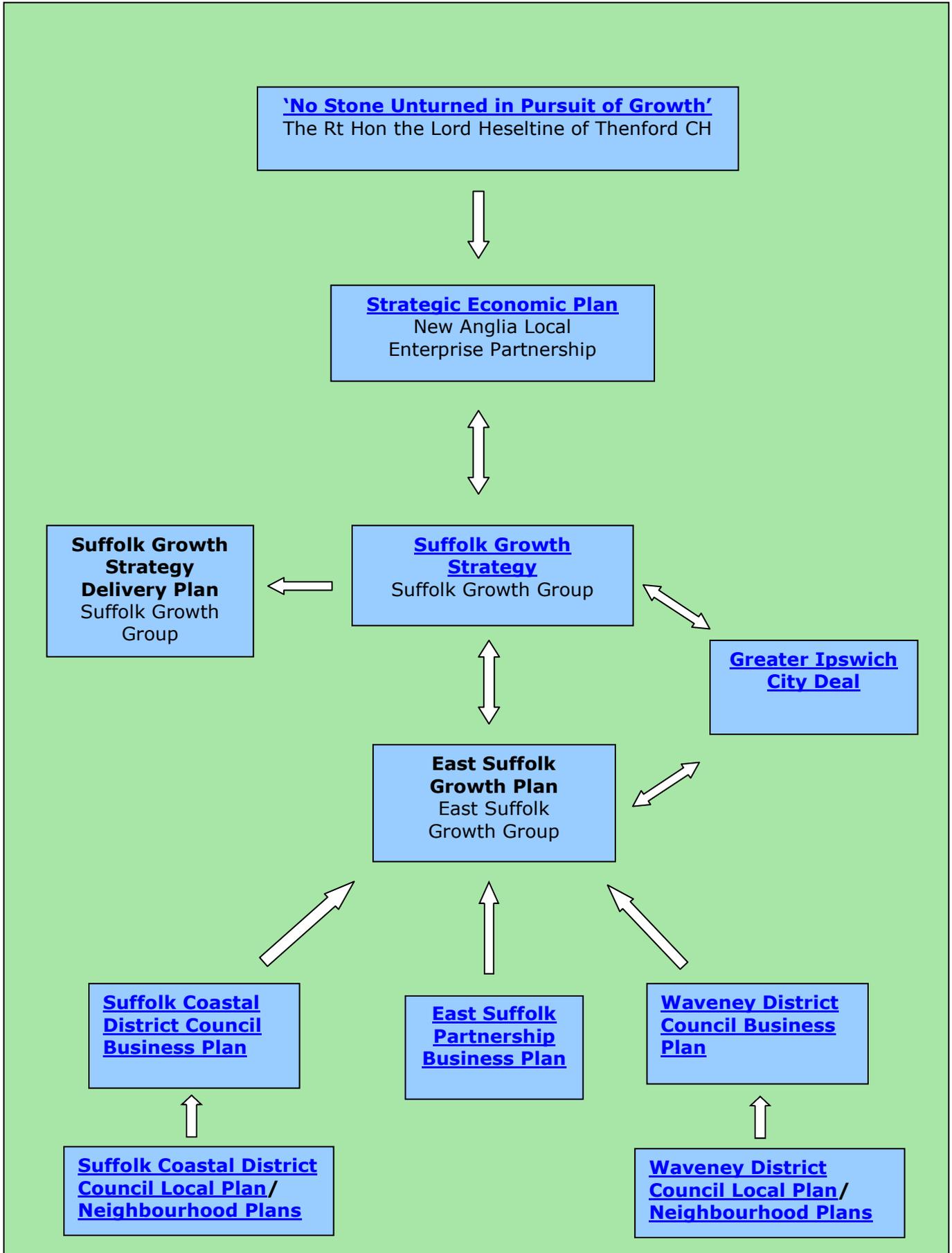
- Working with Government and NALEP to deliver the Ipswich and Norwich City Deal.
- Successfully deliver the Enterprise Zone and Centre for Offshore Renewable Engineering in Lowestoft.
- Successfully attracting a disproportionate share of Growing Places Fund to support capital investment in projects across East Suffolk.
- Bidding for and attracting at least £1m of Growing Business Funds to roll out business support packages across the whole of East Suffolk.
- Working with NALEP to deliver the Green Economy Pathfinder project.
- Working with NALEP on the development of the Growth Hub across East Suffolk.
- Assisting NALEP in delivering the Skills Manifesto and working with our county partners on locally-based skills packages.
- Investing in interventions to support the growth of our key sectors.
- Working within Suffolk to support the Youth Guarantee and to create new apprenticeships.
- Investing in high-level skills and research expertise in our growth sectors: supporting partnerships between UCS and our key business innovators.
- Working with the LEP and other partners to improve business access to finance.
- Unlocking barriers to development - without compromising our environmental advantage - to create new employment sites.
- Working with our partners in market towns across East Suffolk to ensure they develop and thrive.
- Support the AONB and the Suffolk Coast DMO in the delivery of the AONB tourism strategy resulting from the EU Balance project.



# ECONOMIC & STRATEGIC CONTEXT

- 3.1 Although the two districts in East Suffolk are diverse, the common theme in the years since the economic crisis of 2008 has been the impact of the global downturn and ensuing recession. Hence, the national context of the East Suffolk Growth Plan is that of recession and prolonged economic difficulty followed by a period of fragile growth. The most recent forecasts for economic growth suggest that the trend of a growing economy will gather momentum in the short and medium term.
- 3.2 At a national level, economic growth is a political priority and the coalition government has introduced a series of policies and interventions aimed at stimulating growth. One of the coalition government's first initiatives was to establish a number of Local Enterprise Partnerships (LEPs) across the country, including the New Anglia LEP that was established in 2011 to promote economic growth in Norfolk and Suffolk.
- 3.3 The New Anglia LEP published 'Towards a Growth Plan' in July 2013, as a forerunner to their Strategic Economic Plan (SEP). The SEP, due to be published in 2014, will be the framework for investment by central government and local partners. This single, coherent Growth Plan will enable Norfolk and Suffolk to be in a strong position to benefit from investment opportunities that arise from the government's new 'Single Local Growth Fund' and the new European Union programme.
- 3.4 The New Anglia LEP has embarked upon a number of initiatives including the City Deal programme that will increase the financial resources available to the greater Norwich and the greater Ipswich areas for skills development, business support and innovation. The benefits from this programme will include increased apprenticeship provision, business incubation facilities in the ICT sector and improved linkages between University Campus Suffolk, the University of East Anglia and business.
- 3.5 The report '*No Stone Unturned in pursuit of Growth*' by Lord Heseltine states clearly that government must '*reverse the trend of the past century and unleash the dynamic potential of our local economies*'. It notes that '*decisions on housing or transport, education or welfare support will have a greater impact on our economic prospects than any form of direct support provided to business*'. The report's central tenet – that local leaders are best-placed to understand the opportunities and obstacles to growth in their local communities – led to the further expansion of the influence of the LEPs and the creation of the Single Local Growth Fund for regional development. If East Suffolk is to achieve the economic vitality to which it aspires, effective engagement with the New Anglia LEP and the articulation of a clear vision for East Suffolk's future is vital.
- 3.6 The diagram on the following page illustrates how the various growth strategies are influencing economic growth.

**Figure 1: Economic Growth Plans - Strategic Context**

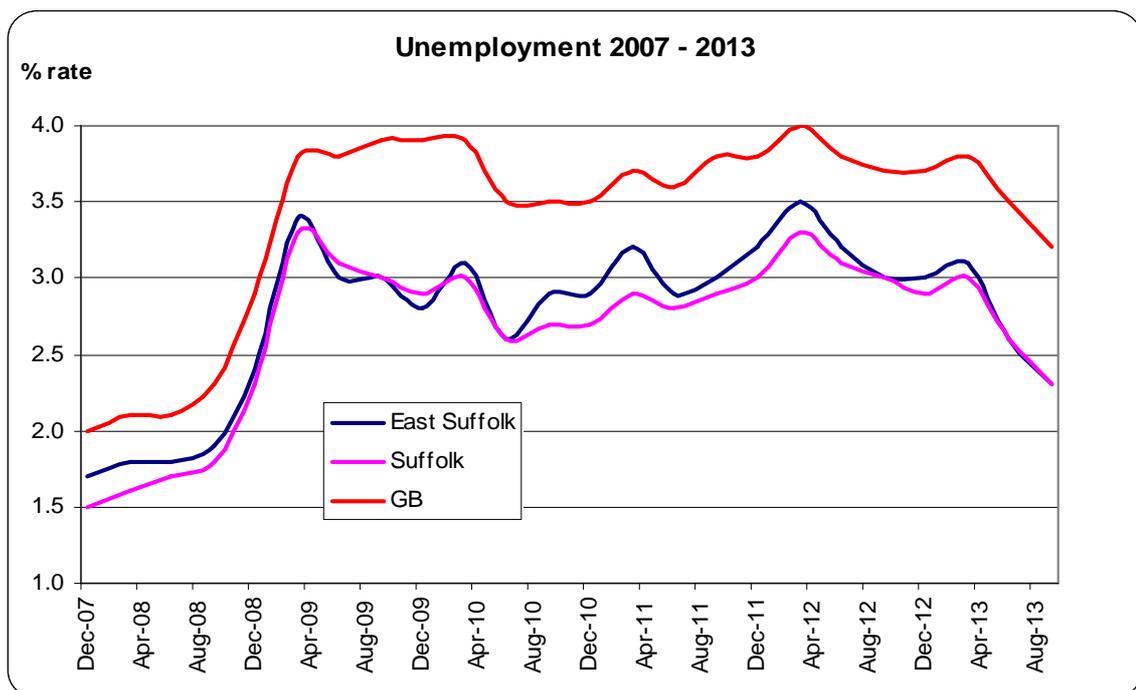




# EAST SUFFOLK ECONOMIC SUMMARY

- 4.1 Local conditions both during the recession and in the recovery phase have been better than the national average. The 'benchmark' indicators of unemployment rates and GVA (Gross Value Added) show that the East Suffolk economy has outperformed the national economy by a significant margin and the regional economy by a smaller margin, over this period.
- 4.2 Across the two districts, unemployment peaked in February 2012 and the current unemployment rate is consistent with the OECD's definition of '\*full employment'. Moreover, following the financial crisis, the rate of unemployment rose more slowly and fell faster than the national, county and regional rates and the decline in GVA was slightly below the national level over the same period. However these sub-regional averages mask significant pockets of unemployment and economic under performance in the larger urban areas of Lowestoft, Felixstowe and Beccles.

**Figure 2: Unemployment Rates (2007 - 2013)**



Source: Claimant Count, ONS

- 4.3 In the medium-term employment and population levels are set to increase. Employment growth is expected to be modest, particularly in the Waveney area, however this growth plan aims to generate a step change in economic performance which will boost these employment forecasts.

*\*Full Employment- When the economy is producing to its maximum sustainable capacity, using labour, technology, land, capital and other factors of production to their fullest potential (<http://stats.oecd.org/glossary/detail.asp?ID=6266>).*

4.4 East Suffolk is home to 240,000 people (2010-based Population Projections, 2010-2035, ONS), and this figure is set to increase by 33,700 (2010-based Population Projections, 2010-2035, ONS) over the next twenty years. Although there has been recent population growth in both districts, and significant further growth is predicted, there is a sharp distinction between the projections for Suffolk Coastal and Waveney areas as shown below:

### Population and Employment Growth

**Figure 3**

	2008-2012		2012-2022	
	Population growth (000s)	Employment growth (000s)	Population growth (000s)	Employment growth (000s)
SCDC	0.5	-1.1	14.3	5.0
WDC	-0.6	-0.9	0.8	0.2

*Source: ONS Interim 2011-based subnational population projections, persons by single year of age/Employment Forecasts*

### Workplace Earnings & Skills

4.5 Skills and qualification levels in East Suffolk are higher than the national average but nonetheless present barriers to economic growth, and there are well-documented skills gaps across most growth sectors. The challenges are greater in the Waveney district than in Suffolk Coastal. This difference in relative skill levels is reflected strongly in the average earnings of the two districts.

**Figure 4**

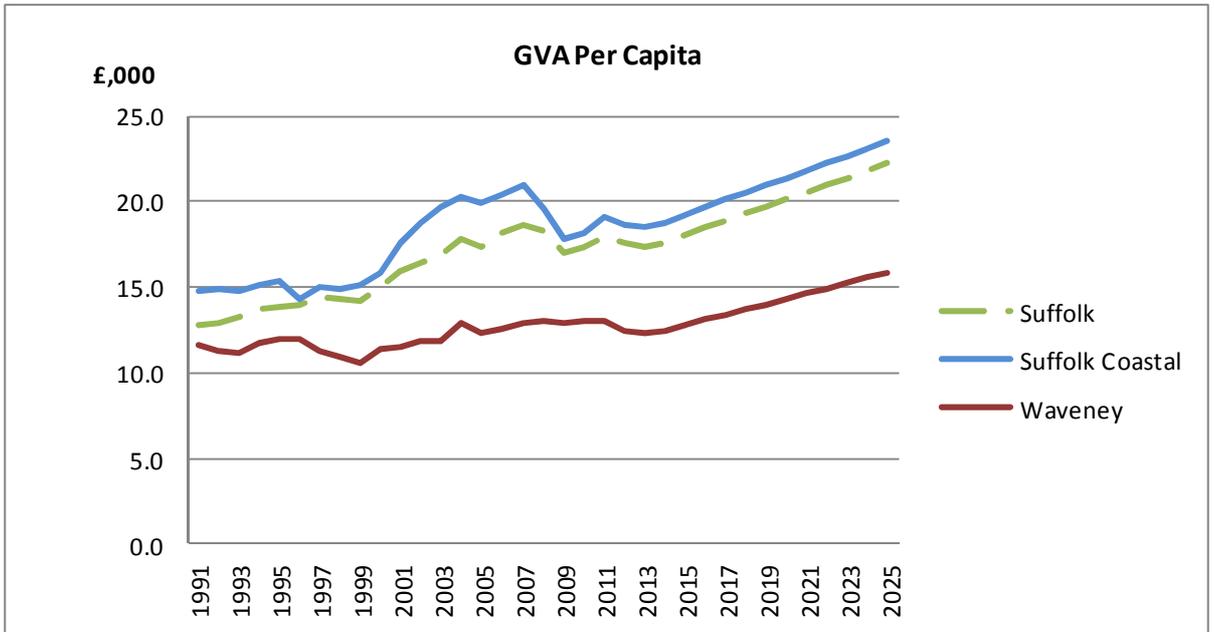
	Median weekly earnings (residence) 2013	NVQ Level 4 or higher 2012	No Qualifications 2012
Suffolk Coastal	£549.50	35.0%	7.0%
Waveney	£451.40	21.4%	8.1%
Suffolk	£485.50	29.5%	7.3%
Great Britain	£518.10	34.4%	9.7%

*ONS: Median gross weekly earnings & Annual Population Survey*

### GVA Growth 2014 – 25

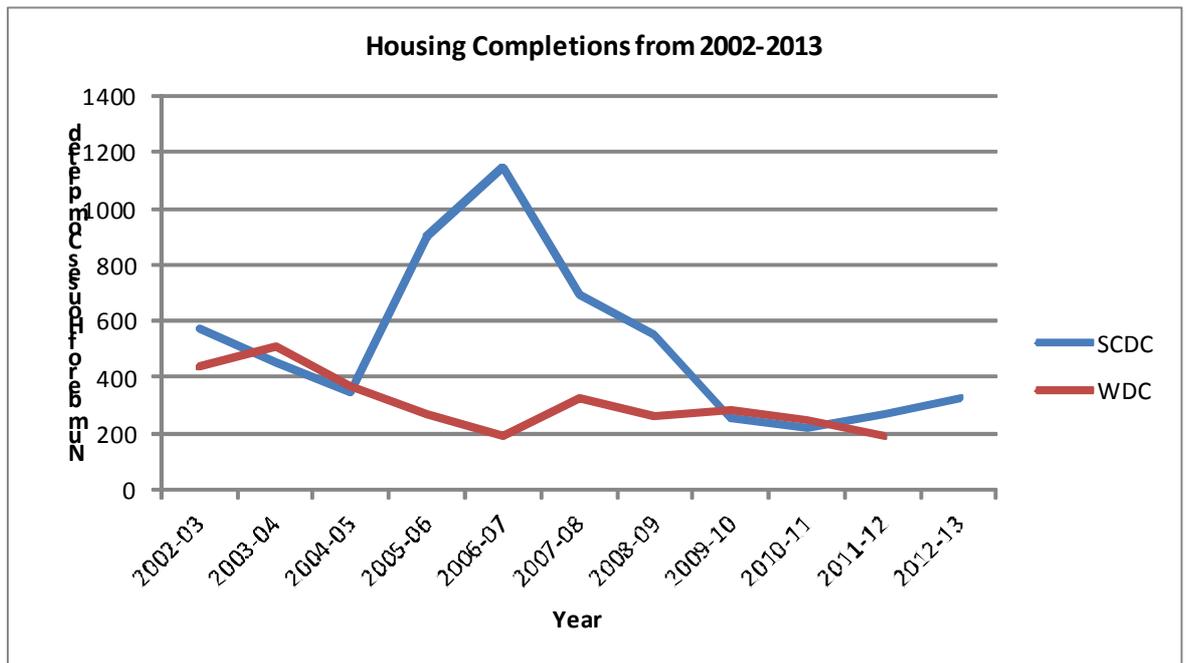
4.6 Historically Gross Value Added (GVA) per capita has been significantly greater in Suffolk Coastal than Waveney. As the table overleaf shows, forecast economic growth rates suggest that between 2014 and 2025 the difference in economic performance between Suffolk Coastal and Waveney will increase. Suffolk Coastal will continue to outperform the Suffolk wide-economy and Waveney will continue to under perform by comparison to the rest of Suffolk.

**Figure 5**



Source: East of England Forecasting Model

**Figure 6**



Source: Suffolk Coastal- Suffolk Coastal District Council, Local Plan, July 2013, p146.  
 Waveney- Waveney District Council Annual Monitoring Report 2012.

## Strengths and Challenges

4.7 The East Suffolk area has several competitive strengths:

- Excellent sea connections to global markets;
- Its coastal location and the related opportunities provided by the low-carbon energy sector;
- Proximity to the City of London and the sizeable Greater London economy;
- Magnificent natural assets that provide tourism opportunities and make it attractive to inward investors.
- Emerging and established sectors with huge potential for growth

4.8 However, it has a number of challenges:

- Inadequate road connectivity, with the A12 and A14 (a trans-European route) requiring upgrades.
- Insufficient rail capacity, including reliability and timetabling issues on the East Suffolk Lines, in particular on the Felixstowe Branch.
- Utilities provision is inadequate which could seriously hamper East Suffolk's growth ambitions.
- Broadband is poor in most rural areas and there are too many mobile 'notspots'. The Better Broadband for Suffolk programme (which began in Autumn 2013 and is due completion in Autumn 2015) will secure broadband speeds of at least two megabits per second (mbps) by 2015, with 85% of the population having access to 'superfast' (>24mbps) broadband
- Flood risk has the potential to reduce economic output in many locations across East Suffolk, as has been recognised by NALEP. The threat of flooding and the threat of coastal erosion are a barrier to both residential and commercial property development.
- Skills gaps and labour immobility present problems, and Waveney in particular has poor educational attainment.
- Environmental constraints that arise from the AONB, SPA and similar designations.





# GROWTH ENABLERS

5.1 In addition to the specific focus East Suffolk partners will be bringing to bear to deliver the growth priorities for our key sectors and growth locations there are a number of cross cutting issues which are critical in facilitating the planned growth. These key elements listed below will be instrumental in realising our growth ambitions. As with actions relating to the growth sectors and growth locations these will be delivered in a variety of ways – directly by the local authorities and in partnership with a host of public and private sector organisations.

## **Workforce Skills**

5.2 Enhancing the skills of both the adult workforce and young people entering the labour market is a critical factor to enabling local economic growth. Employers, large and small, across East Suffolk consistently cite skills shortages as a block to their growth ambitions. Furthermore businesses considering relocation to east Suffolk need to be confident that appropriately skilled labour is available and therefore there are implications for the success of the inward investment activities.

5.3 Low level skills (particularly in Waveney) and the mismatch between supply and demand have been long-running problems in East Suffolk and the county as a whole. These issues are particularly apparent in the key growth sectors we are seeking to support as part of this growth plan.

5.4 As a principal player in the Suffolk Growth Group the East Suffolk councils are working with the other local authorities across the county and the LEP to transform skills from a growth barrier to a growth stimulus. Short and medium-term activity in this area includes:

- Creation of a locally-led skills system which prioritises investment to ensure residents have the right skills at the right time
- Developing an integrated careers and advice system to more-effectively connect young people to employment and skills opportunities
- Establishing a Suffolk-wide apprenticeship service supporting employers to drive the growth of high quality apprenticeships and increase awareness amongst young people of what's on offer
- Prioritising investment in high-level skills and research expertise in our growth sectors through supporting the further development of UCS and its networks, including the establishment of new partnerships between UCS and the innovation centres to strengthen research and knowledge transfer Significantly reducing youth unemployment by establishing a youth guarantee supporting every young person into employment. Lobbying for investment in basic skills development at both primary and secondary education.

## Infrastructure investment to unlock growth

- 5.5 Lack of investment in transport and communications infrastructure has been consistently acknowledged as a barrier to growth in the county and particularly in East Suffolk. A number of initiatives are planned and currently progressing in relation to our main transport arteries and broadband/ mobile communications.
- 5.6 There has been a nationally-recognised need to upgrade the A14 near Cambridge for many years. Originally, the proposals included a toll charge for use of the improved road but following the successful "no toll" campaign the Government decided to drop this part of the plan. The works are planned to start in 2016 and the partner organisations are continuing to work together with the aim of achieving completion at the earliest possible date.
- 5.7 In the 1990's the idea of an Ipswich northern bypass was proposed. This route would remove traffic from the A14, improve movement in and around the north of Ipswich and provide an alternative route when issues arise on the Orwell Bridge. Although the proposal has not been developed, and is not therefore likely to be built in the short or medium term, the route remains an aspiration for the East Suffolk Growth Group.
- 5.8 The A12 between Ipswich and Lowestoft was "detrunked" in 2001 and has subsequently suffered from extreme under investment. The Local Transport Body (LTB) 'long list' included multiple A12 projects such as the 4 villages bypass, various junction improvements and a Third River Crossing at Lowestoft. It is the main route into Suffolk from the south but includes sections that are narrow single-carriageway with 30mph speed restrictions. The 4 villages bypass would deliver improvements but is not the only restricted section. The necessary improvements seem only possible if the new nuclear power station is built at Sizewell and even then are not guaranteed.
- 5.9 The A11 and A47 together form an essential route into Suffolk as well as Norfolk. The route is especially important for the emerging offshore energy sector in Great Yarmouth and Lowestoft as well as other businesses located in the Enterprise Zone. The A11 will be fully dualled by 2014, but dualling of the A47, particularly along the Acle Straight, is desperately needed if it is not to pose a barrier to growth and we will continue to support the A47 Alliance in its effort to achieve this. We have worked closely with transport colleagues to ensure this dualling is included within the LTB list as a first step towards securing these improvements.
- 5.10 The Great Eastern Main Line is in need of new rolling stock on all services. The East Suffolk branch line requires an increase in track capacity, stations should be enhanced and line speed and frequency of services all need improvements. Freight plays an increasingly important role on our rail network, particularly given the key national role played by the Felixstowe container port and the opportunity that improvement to the Felixstowe to Nuneaton rail corridor presents to reduce road congestion. In order to address these issues an alliance of business leaders, local authorities, local enterprise partnerships, MPs and rail groups launched a blueprint to improve East Anglia's rail network. Called "Once in a generation - a Rail Prospectus for East Anglia", it put forward the case for a realistic and technically feasible programme of improvements between now and 2032.

- 5.11 Broadband and mobile communications are poor in most rural areas of East Suffolk. Good fixed and mobile connections are increasingly being seen as essential for business growth and relocation, education and skills development, and therefore the investments being made under the 'Better Broadband for Suffolk Programme' are essential. This activity is only the beginning of our drive to improve communications infrastructure and we will continue to work with our public and private sector partners to secure further investment and improvements during the lifetime of this plan.

### **Commercial Land Supply**

- 5.12 Land for commercial development is in short supply in appropriate locations within East Suffolk. It is vital therefore that development land is identified and all effort made to overcome development barriers such as infrastructure deficits and access issues. East Suffolk will work collaboratively with partners to secure any funding required and gain agreement to bring forward sites for commercial development.
- 5.13 East Suffolk's coastline is vulnerable to tidal surges that periodically drive down the North Sea, the most recent example being December 2013. Flood defences are key pieces of infrastructure that protect economic assets and enable them to function during flood events. Given the economic importance of flood risk management for commercial and industrial centres and regeneration areas, we will continue to work with partners to secure adequate and appropriate investment in flood defences.

### **Housing**

- 5.14 East Suffolk has significant planned housing growth over the next fifteen years, linked into the provision of jobs. This growth is set down in the Local Plans for each district and is largely focused on the most sustainable towns and villages in terms of the provision of services and facilities and their potential to grow. It is likely that in order to meet the needs of the existing and future population additional housing will need to be planned for.
- 5.15 Delivery of housing is an economic growth sector in its own right: local trades and suppliers are required to meet the construction demands, so local employment provision and additional spend in the local area will be created. Housing is also a useful way of helping to secure the delivery of needed infrastructure, both directly and indirectly. Indirect means include the spend of incentivised income and Community Infrastructure Levy (CIL) to help alleviate known and future local infrastructure issues associated with development. The councils' Local Plans provide the evidence base that encourages utilities providers to invest in East Suffolk.
- 5.16 Additional future housing should continue to be keyed in to where the jobs are required. This future planning work needs to be undertaken collaboratively with neighbouring authorities.

Actions in this area include:

- 5.17
- Actively engage with utility providers through the Suffolk Utility Liaison Group to ensure the timely delivery of infrastructure to support planned housing growth.
  - Actively engage with developers to understand their development timelines for planned housing and any barriers to delivery.
  - Work with developers to unlock constraints to planned housing delivery.
  - Work with adjacent local authorities to consider future housing requirements and the spatial distribution.
- 5.18
- In *No Stone Unturned*, it is noted that the UK is unusual '*amongst advanced industrial countries in not having a strong and stable business support infrastructure*' and proposes the building of such an infrastructure around chambers of commerce. However, unlike some other areas of the UK, the East Suffolk business support infrastructure is strong. Town-based groups have strong membership and there is a tradition of collaboration through, for example, the Waveney Business Forum and Heritage Coast Market Towns Initiative. WDC and SCDC recognise the importance of supporting the work of these business associations and will continue to encourage their affiliation to the Suffolk Chamber of Commerce.

### **Inward Investment & Enterprise**

- 5.19
- As part of the Suffolk Growth Group we are working with local authority partners to develop a greatly enhanced inward investment service which will attract economic investment into the county. As a result of East Suffolk's many competitive advantages we are well placed to disproportionately benefit from this activity.
- 5.20
- Furthermore East Suffolk authorities are partners in the emerging Growth Hub initiative which will provide a local, focussed business support service which will increase the number of start-up enterprises and provide greater support for SME expansion. The East Suffolk economy is especially reliant on SMEs therefore better targeted business support providing greater access to national schemes will be a huge boost.

## External Funding

- 5.21 A sub-group of the East Suffolk Growth Group, The East Suffolk Funding and Finance Group, will work with partner organisations to maximise external funding opportunities and maximise the financial worth of our own assets. Funding sources include EU structural funds, central government and regional funds, local financial 'pots' such as Community Infrastructure Levy (CIL) and retained business rates. Where applicable, private investment will be encouraged.
- 5.22 The East Suffolk and Finance Group will coordinate a 'pot' known as the East Suffolk Economic Growth Fund to develop sound business cases for projects within prioritised growth locations and sectors, and for those projects that will tackle barriers to economic and housing growth. This is of growing importance, given the competition for funds in the current economic climate and the short timeframes to turn projects around.
- 5.23 Assisted Area Status case for the Lowestoft and Great Yarmouth Sub-region is currently being championed by a partnership of the county, district and borough councils and the New Anglia LEP. If granted to the sub-region for the period 2014-2020, it would offer funding opportunities and enable greater investment and incentives for inward investment into the area.





# GROWTH OPPORTUNITIES

- 6.1 It is a well-established principle in economic development that an area should play to its strengths and that by focusing on its competitive advantage, economic growth can be maximised. A core strength for East Suffolk is its abundance of established and emerging growth opportunities. [The Suffolk Growth Strategy](#) recognises these key economic assets and of the six growth locations it has identified across the county, four are based in east Suffolk. Similarly, of the key sectors identified in Suffolk, over half are predominantly based in East Suffolk.

## **Growth Locations**

- 6.2 The Suffolk Growth Strategy has identified the following East Suffolk locations as 'Tier 1' growth locations:

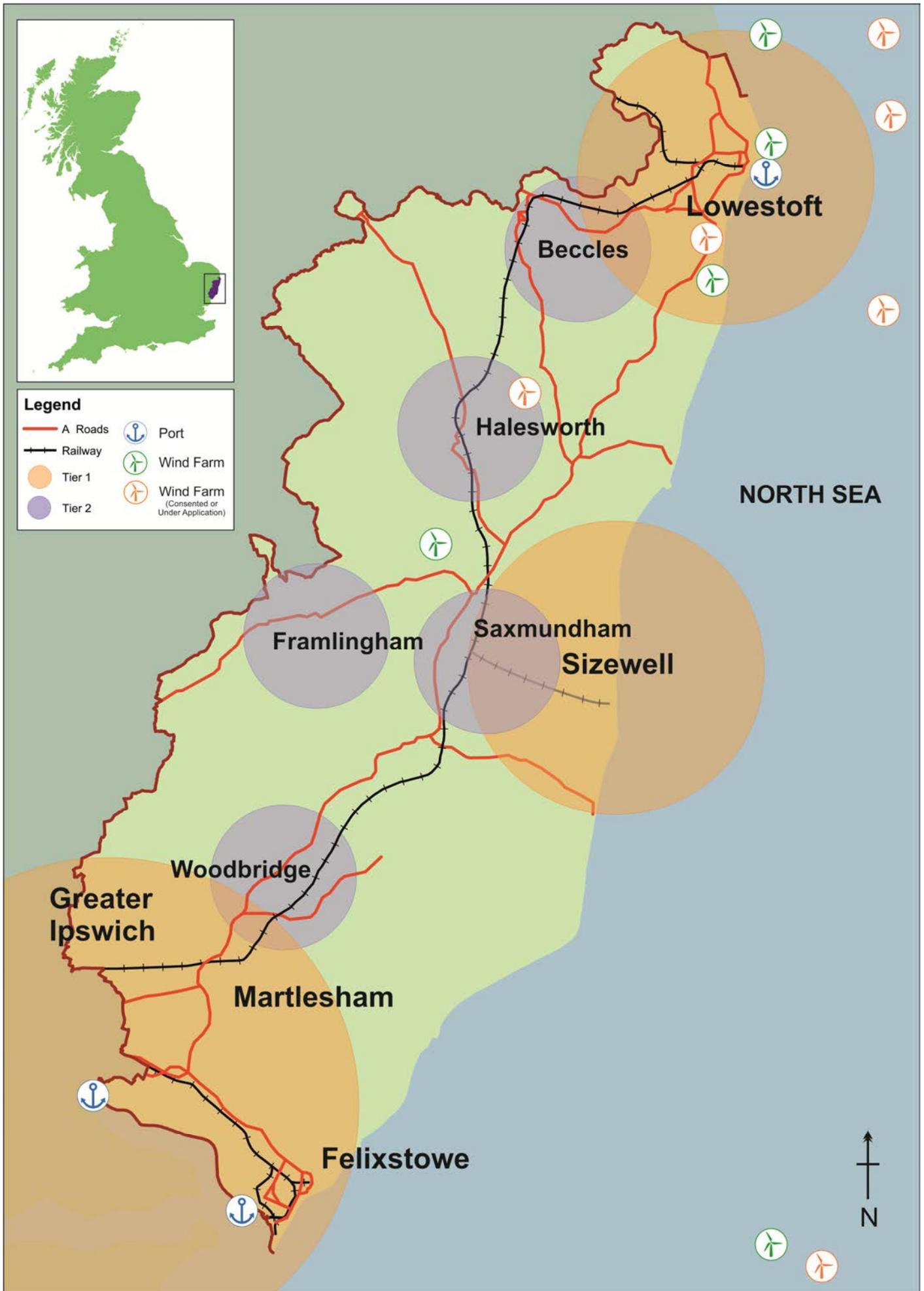
- ✦ Felixstowe & A14 corridor
- ✦ Lowestoft and Great Yarmouth Enterprise Zone
- ✦ Sizewell
- ✦ Greater Ipswich (including Martlesham)

- 6.3 These locations have been identified on the basis of their county, regional and national importance in terms of delivering economic and housing growth. Greater Ipswich is included because it overlaps with the Suffolk Coastal district and because of the impact of the City Deal on the communities and businesses of Suffolk Coastal

- 6.4 The Suffolk Growth Strategy proposes the following outcomes for these locations in East Suffolk:
- Delivery of around 2,000 jobs *over and above those already anticipated from existing businesses within growth locations by 2025*;
  - A steady pipeline of development sites coming forward to enable employment growth.

The map overleaf shows the main growth locations, population centres and communication networks within East Suffolk.

**Figure 7—Growth Location Map**



## Key Sectors

6.5 East Suffolk has a number of sectors that are of significance to the area's economy. In terms of wealth creation, employment and growth potential the following sectors have been identified as critical to future economic growth:

Ports & Logistics  
Energy  
ICT  
Tourism

6.6 These sectors have also been defined as key sectors by the LEP and by the Suffolk Growth Group because they meet four different important criteria:

- High GVA per head per annum (as predicted by the East of England Forecasting Model, November 2013).
- Local assets/infrastructure which deliver a significant competitive advantage (as determined by our smart specialisation approach).
- Potential interventions have been clearly defined (as part of SWOT analysis) and are likely to demonstrate high additionality (i.e.) growth would not occur "naturally".
- Fit with the government's national industrial strategy.

6.7 Therefore, their continuing strength and development is vital to the East Suffolk economy. As such they will be the focus of our sector-based actions in partnership with the SGG and LEP as well as through locally-led activity.

### **Interventions to promote growth locations and develop key sectors**

6.8 In order to realise the potential of the East Suffolk economy, we will:

- Use the new Suffolk Inward Investment service to target the opportunities provided by our 'ready to go' sites to attract investment and support business growth;
- Simplify our approach (where possible) to planning and unblocking unnecessary barriers to development bring forward the sustainable development of major employment sites to attract new businesses;
- Work in partnership with our towns and market towns to maximise their opportunities as 'engines for growth';
- Consider targeted business rate relief;
- Provide assistance with workforce planning, recruitment and supply chain development;

## Ports and logistics: Felixstowe and Lowestoft

- 6.9 The Port of Felixstowe, Britain's largest container port, is of obvious importance to the national economy. The port provides some of the deepest water close to the open sea of any European port and it plays a pivotal role in keeping the UK's trade moving. Maintaining the port's status in light of competition from London Gateway, Southampton and European ports is a priority.
- 6.10 The port has already undergone significant development, with capacity expected to grow by an additional million TEUs\* by 2025 and infrastructure improvements that will enable it to handle the latest mega-vessels'. With UK container traffic likely to grow steadily, there are opportunities for further growth through diversifying Felixstowe's bulk-breaking and post-processing capabilities.
- 6.11 Good transport links through direct road (A14) and rail access to the rest of the country are vital to the operation of the Port. The port currently handles more than 40% of UK container trade and the majority of incoming shipments are transported to distribution centres in the midlands and Northern counties. Over a third of these are transported by rail. The port is uniquely positioned in the UK in being able to handle the world's largest container ships, the number of which is set to increase rapidly from 2013. It directly employs over 2,700 people with a further 10,000 employed in related businesses.
- 6.12 The availability of land for offices, warehousing, container storage, agile manufacturing and lorry parking is crucial to port development. The Felixstowe peninsula in particular has a shortage of such land and therefore districts need to work together to address the issue collectively across Suffolk. By contrast, London Gateway has undeveloped industrial land adjacent to the port, both to support the agile manufacturing sector and proximity to the London market, all of which make it attractive.
- 6.13 However, a recent study by MDS Transmodal for the Port of Felixstowe suggests that Felixstowe has a price advantage of £26 per container compared with London Gateway and that:

*"The Port of Felixstowe's location, scale advantage and rail connectivity means that it appears to continue to offer the lowest cost unit gateway solution for imports and shipping lines of all the south-east UK container ports."*

*MDS Transmodal March 2013*

- 6.14 The Swedish Port of Gothenburg is the Port of Felixstowe's main competitor with regard to the new class of super-vessels, and is gearing up to be Europe's entry port for these ships. Consignments may in the future enter Gothenburg and be broken down for onward travel to the UK, entering the UK by various ports depending on final destination. Worryingly, this scenario would see Felixstowe losing its competitive advantage. In addition, subsidies at Thames Gateway and other European and UK ports, for example recent dredging carried out to support the Port of Liverpool, have placed Felixstowe at a competitive disadvantage.

*\*TEU- A Twenty-Foot Equivalent Unit (intermodal 20ft containers are a standard length, but not a standard height; therefore an equivalent unit is used to approximate the overall capacity of container ships and container terminals ([http://en.wikipedia.org/wiki/Twenty-foot\\_equivalent\\_unit](http://en.wikipedia.org/wiki/Twenty-foot_equivalent_unit))).*

6.15 Within the council's Core Strategy, the policy for Felixstowe is to reverse recent economic decline to enable it to fulfil its potential as a 'major centre' as defined by the strategy. The 'Felixstowe Futures' partnership was established in 2006 to develop a regeneration and enhancement strategy for Felixstowe and adjoining villages. Investment in the town has already seen initiatives including:

- A £2 million Shared Space Scheme for Hamilton Road and Bent Hill that provides a level surface, attractive seating areas and improved shopping environment.
- A new public space and canopy has been provided at The Triangle, the mid-point of Hamilton Road, which performs the function of town square and meeting point.
- New housing and leisure provision at Felixstowe South Seafront is providing £1.4 million public realm works and high quality housing.
- A £2.8 million project to restore and refurbish the Felixstowe Seafront gardens.

6.16 The Port of Lowestoft is important to the offshore energy industry and a large number of supply chain companies are located in the port area. It supports what remains of the town's fishing industry and there are significant marine leisure facilities in both harbours. The town is the largest in East Suffolk with a population of over 60,000 and has a rich maritime heritage. However, the past thirty years have been challenging with decline in both fishing and manufacturing and the changing nature of tourism. However, 70 to 80% of new employment and housing development in Waveney is forecast to be in Lowestoft and future prospects from the energy sector look positive.

6.17 The Port of Lowestoft has an established reputation as a centre for servicing the offshore oil and gas industry, and more recently for the construction, operation and maintenance of North Sea windfarms. It is the closest port to the East Anglia Array windfarm, consisting of up to 1,200-1,800 wind turbines just 14km off the coast. This £24bn development has the target capacity of 7,2GW, which could produce enough electricity to meet the needs of over 4 million households. The town is already home to the operations and maintenance base for the 500MW Greater Gabbard scheme off the coast at Sizewell.

**Potential for growth:**

- 6.18
- Recent and planned expansion of the Port of Felixstowe will result in capacity growth of 50% and predicted employment growth of 5% - 1,400 new direct and indirect jobs - by the end of the decade.
  - The opportunities for the Port of Lowestoft relate mainly to the renewable energy industry. 13,000 jobs are anticipated onshore in the EZ and many more in offshore activities.

### **Barriers to growth:**

- 6.19
- Shortage of land for port-related development;
  - Competition from UK and European ports, with competitor advantage compounded by government subsidies;
  - Shortcomings in road and rail infrastructure;
  - Decline in some aspects of town centre, industrial and resort infrastructures in both Felixstowe and Lowestoft; despite recent Felixstowe port expansion and Lowestoft energy sector growth.

### **Actions to address barriers:**

- 6.20
- Support the Port of Felixstowe's development plans;
  - Support the development of the Lowestoft EZ, and energy-related port activities in both Felixstowe and Lowestoft;
  - Promote the Port of Lowestoft through CORE, EL and NSEA activities.
  - Develop proposals for strategic land assembly; Review employment sites; bring forward appropriate sites for port-related development in both Felixstowe and Lowestoft;
  - Work with partners to secure improved road and rail infrastructure to enhance port activities;
  - Lobby government for increased investment in UK ports and for a 'level playing field' in terms of public investment.
  - Support the Landguard Partnership in applying to HLF for £4.5 million to upgrade the visitor experience on the Landguard Peninsula;
  - Support for the redevelopment of Felixstowe Pier: *planning approval has been granted for the redevelopment of the Pier and the council will work alongside the pier developer to improve the adjoining landscape;*
  - Leisure development: a partner is being sought to support the Council in developing its leisure offer in Felixstowe.

## **Energy: Sizewell and the Lowestoft Enterprise Zone**

- 6.21 East Suffolk is at the heart of energy sector opportunities. Nowhere in the UK has a broader energy mix or as much potential. Of the £271bn of planned investment in energy projects by 2020, £30.8bn is predicted to be in Suffolk and Norfolk. Our offshore gas industry is still growing and we are at the heart of the world's largest market for offshore wind. Sizewell A and B currently employ over 1,200 people, of which 400 are employed in the decommissioning of Sizewell A. A new nuclear reactor is planned at Sizewell which would result in an investment of over £14 billion over ten years. This will create 20,000-25,000 jobs during construction, with a peak workforce of 5,600 at any time; as well as 900 permanent operational jobs.
- 6.22 The Government has granted Enterprise Zone (EZ) status to key employment sites in Lowestoft and Great Yarmouth, largely because of the potential of the fast-growing energy industry. The EZ covering 122 hectares across the two towns and aims to attract energy firms through a package of business rate discounts, streamlined planning rules and access to high speed broadband. The area has also been designated by the Government as one of the country's six Centres for Offshore Renewable Engineering (CORE).
- 6.23 Even without the construction of Sizewell C, the area is a significant centre for employment in the nuclear sector, with over 1,200 jobs across the decommissioning and operation sites. Furthermore there are an additional 1200 temporary contract staff on site during planned outages bringing additional economic benefit to the Sizewell area.

### **Potential for growth:**

- 6.24
- The nuclear industry is set to expand and Sizewell is one of eight proposed new nuclear sites in England and Wales. The proposed 3.2GW Sizewell C new nuclear power station would create 20,000+ construction jobs during the 9 year build programme with up to 5,600 people being employed at peak construction and a further 900 permanent jobs for at least 60 years. There are opportunities to develop associated research and development activities related to nuclear energy.
  - By 2025 it is estimated that the EZ will have generated 13,500 jobs, 200 firms and 540,000 square metres of commercial floor space across Suffolk and Norfolk.
  - The emerging renewable energy sector is gathering pace:-
    - The Greater Gabbard wind farm, (140 turbines) has just had its official opening.
    - A further 140 turbines will be installed at the Galloper wind farm in 2014/15
    - Scottish Power Renewables and Vattenfall have formed East
    - Anglia Offshore Wind Limited - to develop the East Anglia Array. The array will comprise 1,500 turbines and create around 5,000 direct and indirect jobs.

- If the East Anglia Array Zone 1 is approved, onshore construction could begin in 2016, with offshore work starting in 2017: three years of construction and 20 years of operation. The consent application for East Anglia Zone 3 is expected in 2014, with the Zone 4 application following in 2015. Zones 2, 5 and 6 are also hoped to be developed in the future, but further details are yet to be released.

### **Barriers to growth:**

- 6.25
- Most offshore oil and gas platforms are beyond their service life but high oil and gas prices have delayed the decommissioning that needs to occur in the next few years.
  - Jobs are high-value and highly skilled across the sector but there are huge skills shortages. The Engineering Construction Industry Training Board (ECITB) predicts that 60,000 personnel will be needed by 2023 to replace retirees and meet future demand and most jobs will require a good level of education. Only 51% of pupils currently achieve the benchmark of five or more GCSEs at A-C grades in the Waveney area.
  - For turbine assembly and installation a large land mass with access to a deep water port is required. Eastport, Great Yarmouth and Harwich have this capacity but not the Port of Lowestoft. However, the competition for the wind energy sector may not come from local ports but from Europe: the foundation pieces for the Greater Gabbard were delivered from the Netherlands. Road and rail access is not good enough to support wind farm development adequately.
  - Offshore operations and maintenance companies prefer to have river frontage, but Lowestoft has a shortage of commercial land with good quality quay heading.

### **Actions to address barriers:**

- 6.26
- Continue to support the development of the energy sector;
  - Promote the expansion of businesses within the Enterprise Zone;
  - Implement the Lowestoft Area Action Plan (AAP) which has been developed to provide a spatial policy framework for Lake Lothing and the Outer Harbour. The plan identifies a range of employment, residential, recreational, community, transport and environmental improvements and builds on the policies in the Waveney Core Strategy. It will deliver employment-led regeneration including at least 1,000 jobs, town centre extension and 1,500 dwellings. Completion of this is aimed for 2021; with housing allocations aimed to be completed by 2025.
  - Continue to implement the Lowestoft Transport Infrastructure Prospectus (LTIP), A47 & A11 dualling, and the 4-villages bypass
  - Work with Suffolk County Council and energy companies to ensure that the local workforce has the necessary skills.

- Develop the infrastructure to support employment sites in the EZ and beyond.
- Contribute to the implementation plans for Sizewell C
- Support the upgrade of the A12: The A12 is not a trunk road between Ipswich and Lowestoft and is in serious need of upgrade, even for the current volumes of traffic. If a new nuclear power station is built at Sizewell then the problems caused by the extra construction and commuter traffic will make the situation untenable.

### **Information Economy/ICT: Greater Ipswich and Martlesham**

- 6.27 The ICT sector is one of East Suffolk's biggest wealth creators and has the capacity to outperform most other sectors in terms of future growth. The sector is a wealth creator in its own right but it also underpins the wider economy, as an enabler of economic growth across the private sector and a driver for Improved efficiency in the public sector. Almost 6,000 people are employed in the ICT sector in Suffolk and the BT research facility at Adastral Park contributes over £800 million a year to the local economy.
- 6.28 The sector has higher-than-average skills levels and correspondingly high pay levels. Although the sector is diverse, businesses share an emphasis on innovation, are strong exporters and have a tendency to grow (or fail!) very fast in comparison with some other sectors. It is characterised by high levels of business-start-up activity.
- 6.29 East Suffolk is home to Adastral Park, BT's worldwide R&D operation, situated in the parish of Martlesham, 6 miles east of Ipswich. Martlesham has a small population but its proximity to strategic roads and employment sites has resulted in its designation as a Strategic Employment Area. This is one of the UK's largest concentrations of research excellence in ICT, with 3,000 professionals working onsite for diverse companies such as Alcatel-Lucent, BT, Cisco Systems, Fujitsu, Nokia Siemens Networks and Huawei Technologies.
- 6.30 BT has embarked upon an ambitious development programme for the Adastral Park site, which will see the development of both residential and business units beginning construction within the next five years. The Adastral Park site already hosts 'Innovation' Martlesham, an ICT cluster that supports 45 ICT-related businesses and is set for further expansion.
- 6.31 The proximity of the Adastral Park site to University Campus Suffolk presents an opportunity to create a centre for innovation and research in ICT and to exploit opportunities arising from the 'Smart Anglia' initiative.

## Potential for Growth

- 6.32
- Proposals by BT to develop Adastral Park could see the refurbishment of 2357 sq m of existing employment space, and the development of 2,000 new homes, an additional 60,000 sq m of employment space and the potential for 2,000 new jobs . This has the potential to support the continued growth of this world class ICT cluster which will support contribution to the employment base of East Suffolk and beyond.
  - The number of ICT businesses at Innovation Martlesham is set to double over the next three years and the cluster is forecast to support 2,000 jobs in the longer term.

### Barriers to growth:

- 6.33
- Poor broadband speeds are particularly challenging to businesses in the ICT sector.
  - Skills requirements are high and the shortage of an appropriately-skilled workforce is a challenge in Suffolk.
  - Businesses in this sector are particularly hard for the public sector to engage with. 95% of enterprises in the UK's information economy sector employ fewer than ten people.

### Actions to address barriers:

- 6.34
- Continue to support the further development of Innovation Martlesham, including collaborative work to develop a new facility on Ipswich waterfront
  - Work with the LEP's 'Smart Anglia' initiative to derive more benefit from the sector;
  - Continue to lobby for improved broadband and mobile network improvements, towards a target of 100% mobile phone coverage and 90% superfast broadband coverage;
  - Work alongside UCS and the City Deal programme on interventions to help those companies with fewer than 10 employees;
  - Work with the LEP to improve access to finance for start-up companies in the ICT sector;
  - Engage and work with the government's Information Economy Council to strengthen the sector in East Suffolk;
  - Promotion of apprenticeship schemes within the ICT sector and added incentives for SME apprenticeships;

([www.adastralvision.com/vision/employment\\_economy.html](http://www.adastralvision.com/vision/employment_economy.html)).

## **Tourism: coastal and rural East Suffolk and its market towns**

- 6.35 10% of East Suffolk's working population is employed in tourism and the sector is worth over £500 million to East Suffolk. Although jobs in the sector are relatively low-skilled and poorly paid they offer desirable employment, particularly in terms of part-time and short-term opportunities. The sector's strength arises largely from the natural attractions of East Suffolk coupled with the area's proximity to tourist markets in London, the home-counties and the midlands.
- 6.36 The Suffolk Coast brand is very strong indeed – wide skies, artisan food, beach huts, rolling countryside, coastal landscapes. Population growth in the Midlands and South East, rising travel costs that encourage 'staycations', interest in 'authentic' English destinations and a weak pound have combined to bolster tourism opportunities in East Suffolk.
- 6.37 East Suffolk has some significant tourist attractions, including its coastal resorts, market towns and surrounding countryside, arts and heritage attractions (Aldeburgh Music, many small museums, general leisure attractions (Africa Alive!, Pleasurewood Hills Theme Park, Easton Farm Park) and areas of natural beauty such as the Suffolk Coast Area of Outstanding Natural Beauty (AONB), the Broads and the Waveney Valley. The quality of historic and built environment presents tremendous opportunities for tourism, not only in terms of heritage sites such as Orford and Framlingham castles, but also the built environment of the many villages and market towns. Outdoor pursuits, including sailing, cycling, walking and fishing are also a strong feature of the area's tourist economy.

### **Potential for growth:**

- 6.38
- The ability of the tourism sector to grow and develop depends to a great extent on the safeguarding of the area's tourist assets and on the ease of access to the area. The growing population in the Greater London area and Suffolk's expanding population presents an increasing market for East Suffolk's attractions.
  - The tourism sector has not only grown consistently in East Suffolk for the past twenty years but has outstripped the rate of tourism growth at the national level. There is no reason to expect that this trend will be reversed in future.

### **Barriers to Growth:**

- 6.39
- The customer base is changing: an increasing proportion of our visitors is drawn from the affluent London area and customer demands are becoming more sophisticated. The sector is dominated by small businesses that can find it hard to adapt to changing customer need. Particular difficulties in customer service provision have been identified, linked to lack of investment, poor skills levels and a lack of training within the sector.

- The traditional B&B is in decline and there has been a corresponding rise in demand for self-catering accommodation and for 'niche' or 'boutique' hotels. The area's accommodation stock is slowly changing but there is insufficient accommodation in many parts of East Suffolk.
- Some of our resorts are 'full' in peak season weekends and there is an ongoing challenge to extend the season and to attract visitors outside these peak times.
- Coastal erosion already presents problems in both resort and rural coastal areas and this is likely to become a more prominent challenge in the future.

### **Actions to address barriers:**

#### 6.40 *Build the brand:*

- Work with the Waveney Valley and Sunrise Coast area to establish a suitable route to market for their customer base; whether that be through the Suffolk Coast brand or some other identity.
- Support the marketing and promotion of the distinctive resorts of Felixstowe and Lowestoft.
- Work with the LEP and partners to simplify the brands within the LEP area
- Build on our success in promoting the area as a film/TV location.

#### *Develop the brand:*

- 6.41
- Encourage and support new accommodation and new/enhanced tourist attractions;
  - Work with SMEs to improve the quality of the product;
  - Use our strong town-based partnerships as a vehicle to promote and develop tourism.
  - Create an additional 1,000 tourism jobs in East Suffolk by 2025.

#### 6.42 *Ensure the brand remains strong into the future:*

- safeguard the area's distinctive qualities;
- bring customers to our food, drink and agricultural businesses via tourism.

## Tier 2 Sectors and Growth Locations

6.43 Having identified and prioritised East Suffolk's key sectors, it is recognised that there are several other employment sectors that are of significant importance to East Suffolk. These sectors include;

- Agri-tech.
- Food and drink production.
- Creative industries.
- Financial services.

6.44 Equally, in addition to the Tier 1 locations there are a number of market towns across East Suffolk which offer significant opportunities for growth in population, business base and sphere of influence and are identified as 'Tier 2' locations, namely;

- Beccles and Worlingham
- Halesworth
- Framlingham
- Saxmundham
- Woodbridge & Melton

6.45 The Suffolk Growth Strategy recognises the importance of our towns and market towns to their communities as centres of commerce, culture and recreation. Each one is unique and has the opportunity to be an engine of growth.

6.46 However, The Suffolk Growth Strategy also recognises that for them to prosper and grow, they also need support. Action 13 of the 'Suffolk Growth Strategy Delivery Plan' commits local government to work in partnership with our towns and market towns to maximise their capabilities as engines of growth.

6.47 Some of East Suffolk's town and market towns are thriving; others less so. The towns listed above have been identified in this plan based on the level of employment and/or housing growth anticipated in the Local Plans for each District over the next fifteen years.

### **Opportunities for growth:**

- 6.48
- These market towns are recognised as important centres of commerce, culture, tourism and recreation. Each is unique and has the opportunity to be an engine for economic growth.
  - The market towns are important in that whilst the key employment sectors are largely based in East Suffolk's Tier 1 growth locations, the market towns tend to support the smaller employment sectors such as food production, retail and financial services.

- The Suffolk growth strategy recognises that these market towns need support if they are to prosper and grow and this is echoed at national level through initiatives such as the Portas Review and the recent Grimsey Report. Across Suffolk eleven towns have received funding from government under the Portas initiative, and six of these are within the East Suffolk area.

#### **Barriers to growth:**

- 6.49
- Lack of expertise in the face of competition from larger towns and from the growth in internet trading.
  - Lack of investment in town centre infrastructure has contributed to a decrease in business confidence on the high street in some towns.
  - Lack of resource to promote and develop the economies of these towns has left them vulnerable during the economic downturn and many small businesses, particularly in the retail and service sectors, have ceased to trade.

#### **Actions to address barriers:**

- 6.50
- Work with SCC and other districts to develop a county-wide support package for market towns, including the establishment of a Suffolk Town Team network.
  - Develop a town centre fund to support the development of East Suffolk's market towns.
  - Continue to support business & town centre organisations and town teams in each town.
  - Support the Lowestoft BID\* and the creation of additional BIDs where demand is identified.
  - Support the delivery of Broadway Farm Halesworth, by seeking funding for site development and working with partners to facilitate progress of the project.

*\*BID– Business Improvement District: a defined area within which businesses pay an additional tax (or levy) in order to fund projects within the district's boundaries. BIDs can also draw on other public and private funding streams ([http://en.wikipedia.org/wiki/Business\\_improvement\\_district](http://en.wikipedia.org/wiki/Business_improvement_district)).*



# MEASURING SUCCESS

7.1 Through our collaboration on the SGS and Delivery Plan as well as our own plans we have identified an ambitious set of activities that will drive economic and housing growth in our sub-region. In order to measure our performance and be accountable for our commitments we will be regularly providing an objective measure of our progress.

7.2 The performance indicators set out below will provide a measure of both our achievements and the trends in east Suffolk's labour market. By providing these two sets of measures we can report on our progress in the context of the wider macro-economic environment.

## **Performance indicators based on our interventions:**

- 7.3
- Total number of direct & indirect jobs created
  - Total number of jobs sustained
  - Total number of businesses created
  - Total sq.m of employment floor space created
  - Total sq.m of land regenerated
  - Total number of dwellings created
  - Total amount of income generated (business rates, rent, return on investment, etc)
  - Total amount of external funding attracted (public & private)
  - Overall economic value generated (inward investment, salaries, multiplier effect etc)

## **Labour Market Trends**

- 7.4
- Employment rate
  - Employment by sector
  - Unemployment rate
  - Youth unemployment
  - Long-term unemployment
  - Weekly earnings
  - Workforce skills
  - Tourism volume & value statistics



# APPENDIX A

## Baseline Labour Market Information

	SCDC	WDC	LEP AREA	GB
Employment rate	79.2%	71.2%	75.1%	71.1%
Unemployment (JSA Claimants aged 16–64)	1.1%	3.3%	2.4%	2.9%
Youth unemployment rate (JSA claimants aged 18-24)	2.8%	7.8%	4.9%	4.9%
% Long term unemployed claimants (over 12 months, JSA claimants )	27.2%	30.8%	30.1%	30.8%
NVQ4 or higher qualifications	35.0%	21.4%	29.8%	34.4%
No qualification	7.0%	8.1%	8.4%	9.7%
Gross weekly pay (workplace)	£557.80	£420.90	Not available	£517.80
Gross weekly pay (residence)	£549.50	£451.40	Not available	£518.10

### Data Sources:

*Employment rate: ONS annual population survey, Jul 2012–Jul 2013. % are for those aged 16-64.*

*JSA claimants: aged 16-64, youth unemployment (ONS JSA claimant count—age duration with proportions, December 2013). JSA claimant count records the number of people claiming Jobseekers Allowance (JSA) and National Insurance credits at Jobcentre Plus local offices. This is not an official measure of unemployment. Note: % is number of persons claiming JSA as a proportion of resident population of the same age.*

*Long term unemployment: % long-term unemployment are as a proportion of the total number of persons claiming JSA (ONS claimant count—age duration with proportions).*

*Qualifications: (ONS annual population survey, Jan–Dec 2012). % is a proportion of resident population of area aged 16-64.*

*Gross weekly pay: (ONS annual survey of hours and earnings, 2013). Median earnings in pounds for employees working or living in the area.*

## Employment by Sector (2008)

SECTOR	SUFFOLK COASTAL (employee jobs)	SUFFOLK COASTAL (%)	WAVENEY (employee jobs)	WAVENEY (%)	NEW ANGLIA LEP (employee jobs)	NEW ANGLIA LEP (%)
Manufacturing	3,300	7.1	6,800	17.2	71,800	11.6
Construction	1,600	3.4	2,400	6	33,500	5.4
Services	39,400	84.4	29,500	74.6	495,300	79.7
Distribution, hotels and restaurants	10,000	21.4	10,800	27.2	156,100	25.1
Transport and communication.	10,500	22.4	1,700	4.3	35,300	5.7
Finance, IT and other business activities.	6,300	13.6	5,500	13.8	110,300	17.8
Public admin, education and health	10,300	22.1	9,900	24.9	164,400	26.5
Other services	2,300	4.9	1,700	4.4	29,200	4.7
Tourism-related†	4,500	9.70	4,400	11.1	56,300	9.1

Source: ONS annual business inquiry employee analysis (2008)

† Tourism consists of industries that are also part of the services industry (see the definitions section)

% is a proportion of total employee jobs.



# APPENDIX B

## Housing Completion Data

Number of Housing Completions		
Year	SCDC	WDC
2012-13	324	
2011-12	270	192
2010-11	216	248
2009-10	256	280
2008-9	550	263
2007-8	694	323
2006-7	1,150	191
2005-6	902	271
2004-5	347	367
2003-4	456	507
2002-3	571	436
<b>Source:</b>	<i>Suffolk Coastal District Local Plan July 2013 p146</i>	<i>WDC Annual Monitoring Report 2012*</i>

*\*The monitoring period for this report was 1st April 2011 to 31st March 2012.*



Waveney District Council  
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in partnership