

HOW TO DELIVER GREAT JOBS

TOWARDS A REGIONAL INDUSTRIAL STRATEGY FOR NORFOLK AND SUFFOLK

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Prepared for the Trades Union Congress (TUC), September 2017

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EXECUTIVE SUMMARY

Against the backdrop of industrial strategy's newfound prominence, this study focuses on the areas of Norfolk and Suffolk. Its aim is to examine the possibilities for boosting 'good jobs' in these areas whilst supporting the UK's transition to a low-carbon future. This report focuses on the key sectors of food and drink manufacturing and those associated with the coastal economy; including tourism, fishing and offshore oil and gas and renewable energy. The research is based on interviews with local stakeholders, analysis of quantitative data on the area's economy and a roundtable discussion at Ipswich Town Hall.

We identified several factors in the Norfolk and Suffolk economies which impact upon prospects for good jobs. These include:

- **Low unemployment, low wages, low productivity:** the area has lower than average wages and high income inequality. Labour productivity is below the national average and this is likely due to the prevalence of jobs in services industries, such as tourism, retail and social care.
- **Manufacturing in decline and pressure on food and drink production:** there is a ready supply of cheap labour and little evidence of capital investment. Where productivity has increased, this has often been accompanied by redundancies, stagnant wages and pressure on workers to do more despite there being less staff.
- **An important but struggling fishing sector:** the prominence of fishing vessels in the counties' major ports has declined because of shipping, energy and tourism using port infrastructure. The majority of fishing vessels and employment are in the inshore fleet (smaller boats), but their fishing capacity and limited access to quota mean that these fleets struggle.
- **Lack of connectivity:** the two counties face serious issues with transport infrastructure. Digital infrastructure falls short of national averages and government targets.
- **Business and ownership structures pose a challenge to good jobs:** management decisions at larger food and drink manufacturers are often responsive to movements in share prices and investor sentiment, exacerbating

jobs' precariousness. The ownership structures of assets and high productivity industries raise questions about how much wealth is retained in the local area.

- **Brexit:** although the parameters of this are currently unclear, it is difficult to overestimate the impact that changes to trade, immigration, the national regulatory framework and the ongoing devaluation of the pound could have.
- **Front line of both climate change and green technology:** the natural environment is integral to the area's identity and economy. It is vulnerable to climate change but is well placed to become an exemplar of how to transition to a green economy.

In response to the challenges outlined above, we identified some key areas for change:

- **Nature of work:** There is evidence of an erosion of conditions at work and workers' ability to bargain to improve them. This has implications for the training, cohesion and stability of the work force.
- **Skills – where people are at now vs 'growth industries':** the education sector is not equipping enough young people with the skills needed for jobs in growth sectors. The loss of jobs in oil and gas highlight the risk of losing expertise because of failure to actively manage industrial transitions. The financial and time barriers to re-training for adults are considerable, especially for those who have families.
- **Coordination between sectors and organisations:** Norfolk and Suffolk have many sectors which are interdependent – an important part of an effective industrial strategy for the area therefore will be identifying and building these links, particularly for local actors.
- **Governance structures:** Following the collapse of an East Anglian devolution deal, Norfolk and Suffolk lack a cross-county organising structure. The New Anglia LEP is well regarded but lacks funding and staff to fulfil the functions required.

The report brings together all of these findings in order to make some recommendations for a successful industrial strategy which would deliver good jobs in Norfolk and Suffolk.

OBJECTIVES:

- Ensuring that local people and institutions are at the decision-making table and have power to shape policy and practice
- Delivering good jobs across the country in a way that is consistent with decarbonisation
- Ensuring that local people benefit from the value and wealth generated in their areas

RECOMMENDATIONS TO ACHIEVE THESE:

1. Real strategic power at a regional level: a new body to coordinate decision-making and get the right voices round the table.

Regional: a new regional body with leadership and participation from local government, employers, unions, universities and colleges, third sector using a social partnership approach to coordinate infrastructure investment, skills coordination, coastal management and industrial transition.

National: work with local institutions to create a network of regional bodies.

2. Better pay and productivity in the sectors that need it most such as retail, hospitality and food manufacturing.

Regional: New Anglia or new regional body should convene regional sector groups of employers and unions to address questions of pay and productivity. Local government at city, district and county level should adopt the TUC's Great Jobs Agenda and take action to promote it, including adoption of the real Living Wage as a first step

National: create new sectoral institutions specifically focused on low-paid sectors and take action to reduce zero hour contracts and introduce a premium pay rate for non-guaranteed hours.

3. Skills strategy tailored to demands of local people and firms equipping young people so they can access future opportunities.

Regional: skills budgets should respond to specific challenges faced in different sectors by better connecting business and education institutions and ensuring better careers advice and guidance for young people about future opportunities.

National: devolve skills budgets so local priorities can be met. Reverse cuts to Further Education budgets. Increase re-training support and financial compensation for people affected by transition. Involve trade unions in the new National Institute of Apprenticeships and Institutes of Technology.

4. Investment for the long term: in transport infrastructure, broadband infrastructure, and science and innovation.

Regional: New Anglia or new regional body should conduct a holistic review of infrastructure needed given future developments including energy construction and decommissioning, and develop a coordinated plan.

National: National Infrastructure Commission to engage with and fund local plan. Replace EU funding for innovation post-Brexit, including Horizon 2020 funding for Low Carbon Technologies. Regional growth fund for fisheries to replace the EMFF, focused on ports.

5. People, employers and government shaping the new economy together through strategic planning and appropriate support for workers, with a focus on the development of low-carbon industry and local assets in the region.

Regional: introduce dialogue between workers and decision-makers and planning mechanisms to ensure future trends deliver for local people. Prioritise social impact and community economic development when appraising investment and funding decisions. Adopt a target for community or locally owned energy.

National: introduce greater support and compensation for adults affected by transition. Set an ambitious national target for energy generation from offshore and marine renewables of at least 50% of energy to come from renewables by 2030. Increase support for local energy supply markets.

INTRODUCTION

What is industrial strategy?

The formation of a forward-facing industrial strategy is now a key aim of government policy. Central to this ambition is the need to enact deep changes to the way the UK economy functions in order to improve the prosperity of people throughout the country. This occurs in the context of continuing major imbalances in the economy, lacklustre recovery from the financial crisis and uncertainty and opportunities arising from the decision to leave the European Union.

Industrial strategy has traditionally been classified into ‘vertical’ and ‘horizontal’ approaches. Vertical industrial strategy focuses on particular sectors that are strategically important, with the government indicating that life sciences, ultra-low emission vehicles, advanced manufacturing, nuclear power and creative industries as the first in line for ‘sectoral deals’¹. Horizontal policies seek to influence the economic environment more broadly and can include action on skills and education or changes to regulatory or tax regimes. In practice, these approaches are complementary and can overlap.

In early 2017 the government launched a green paper and consultation that received over 1,900 responses². This included an important acknowledgement of the need to reduce inequalities and transition to a low-carbon economy, both of which are crucial in meeting the aim of increasing long-term prosperity for all (as detailed in a forthcoming New Economics Foundation paper). These principles, however, must be central and the trigger for radical action if the government’s ambitions are to be realised.

As the Trades Union Congress response to the green paper expresses, job creation must not only focus on productive and well-paid sectors but for growth to be truly inclusive the quality of employment across the economy must also be raised³. A prioritisation of workers’ experience and ability to contribute to raising productivity leads to a definition of a high-quality job being one where workers have a meaningful voice in the workplace, fair and decent pay, regular hours, access to learning and progression, fair treatment and respect and a healthy workplace⁴. Millions of jobs across the UK do not

meet this definition and a successful industrial strategy must address the question of how to improve these jobs.

As the Industrial Strategy Commission highlights, industrial strategy is important not just as a package of policies but as “the organising principle for UK supply-side economic policy across all government departments, in the devolved administrations, local authorities and in the emerging tiers of regional government”⁵. The mapping and active management of linkages between public, private and third sector economic actors present an opportunity for interventions to be more than just the sum of their parts. The need for local knowledge, and expertise to do so effectively, implies the importance of a place-based approach to industrial strategy, which is reflected in the Government’s proposals as they stand.

Research methods

To begin to understand what this looks like in practice, this report forms part of a wider programme of research commissioned by the TUC looking at how an industrial strategy could help deliver ‘good jobs’ in three areas with distinct issues and opportunities.

The aim of this report is to understand how a locally tailored industrial strategy can support and increase the number of good jobs in Norfolk and Suffolk. East Anglia’s high-tech success story, Cambridgeshire, has an output per hour worked that is 5% higher than the UK average. Conversely, despite clusters of highly productive sectors, districts in neighbouring Norfolk and Suffolk are between 1% and 11% below the national average⁶, with high levels of inequality within the county borders. It is unsurprising, therefore, that people in the area have important contributions to make on how to boost good jobs in ‘left behind’ communities across the country by eradicating these types of place-based inequalities.

We define good jobs as those with the same features as the TUC’s concept of high-quality work whilst also supporting the objective of transitioning to an ecologically sustainable economy. The research involved the analysis of quantitative data on the area’s local economy, interviews with 18 local stakeholders and a roundtable at Ipswich Town Hall. Interviewees included key leaders in local government, business, the Local Economic Partnership (New Anglia), trade union representatives from several

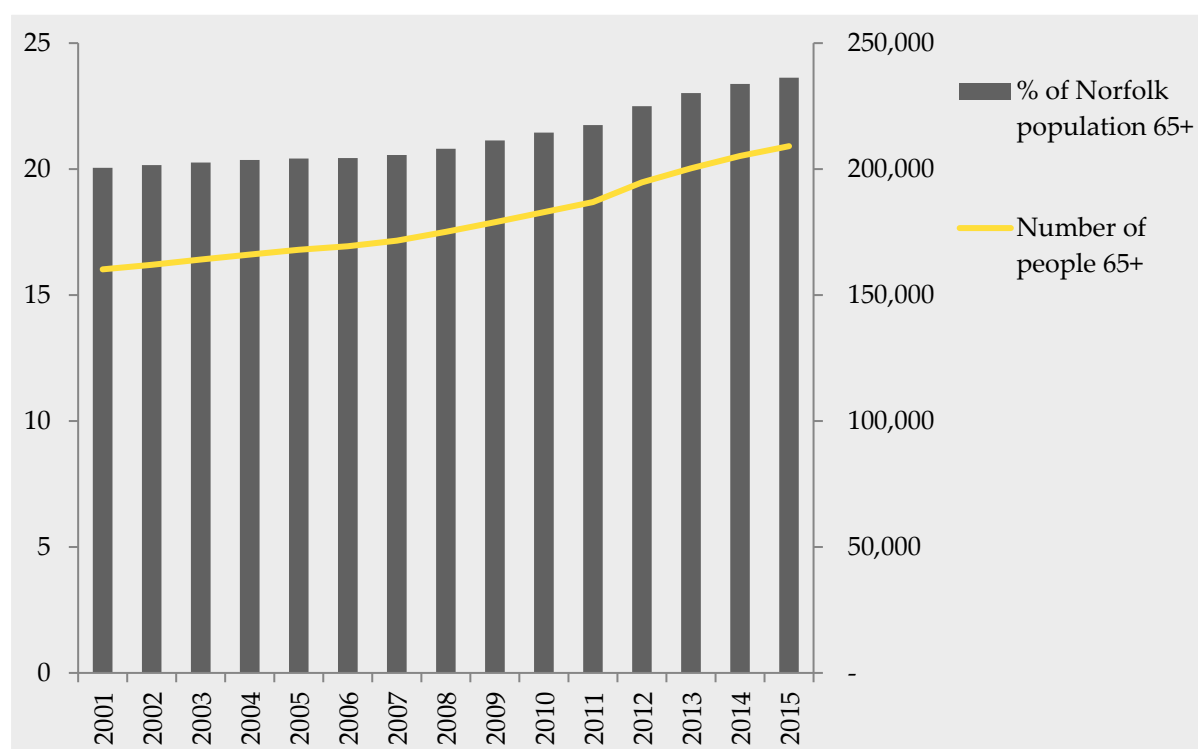
workplaces, and academics focusing on sectors that highlight the distinct nature and potential future of the Norfolk and Suffolk economy. These were food and drink manufacturing and industries associated with the coast, namely offshore energy, tourism and fishing.

Overview of Norfolk and Suffolk

Norfolk and Suffolk are counties situated in East Anglia, bordered to the west and south by Cambridgeshire and Essex respectively and to the east by the South North Sea.

Norfolk has a population of 896,000 people and Suffolk 748,000⁷, around 10% of whom live in the county towns of Norwich and Ipswich. Other larger settlements are King's Lynn, Bury St Edmunds and the port towns of Lowestoft and Felixstowe, the latter home to Britain's biggest container port and a busy point on many shipping routes through Europe⁸.

Outside of these urban centres, the majority of wards in the two counties are classed as rural, with many of the top 50 most rural districts in England falling within their boundaries⁹. The picturesque coast and countryside mean that the area is a popular retirement destination; 21% of the population in East Anglia is retired compared to 13% for the UK as a whole¹⁰. Nearly a quarter of East Anglia's population is over 65, significantly higher than the national average of 17.7% and having grown substantially since the financial crisis of 2008.

Figure 1: Population of over-65s in Norfolk

Source: Norfolk Insight

This is particularly true for Norfolk. North Norfolk has nearly twice the national average proportion of elderly people. The exception is Norwich, which has a much younger age profile and a lower proportion of people over 65 than the rest of the country.

Local government comprises Norfolk and Suffolk County councils, Norwich City Council, Ipswich Borough Council, and a range of district councils. The Local Economic Partnership is called New Anglia. A proposed devolution deal was withdrawn in 2016 after five local authorities voted against the plan; Cambridgeshire and Peterborough subsequently went ahead with the creation of a metro mayor and combined authority.

Key Sectors

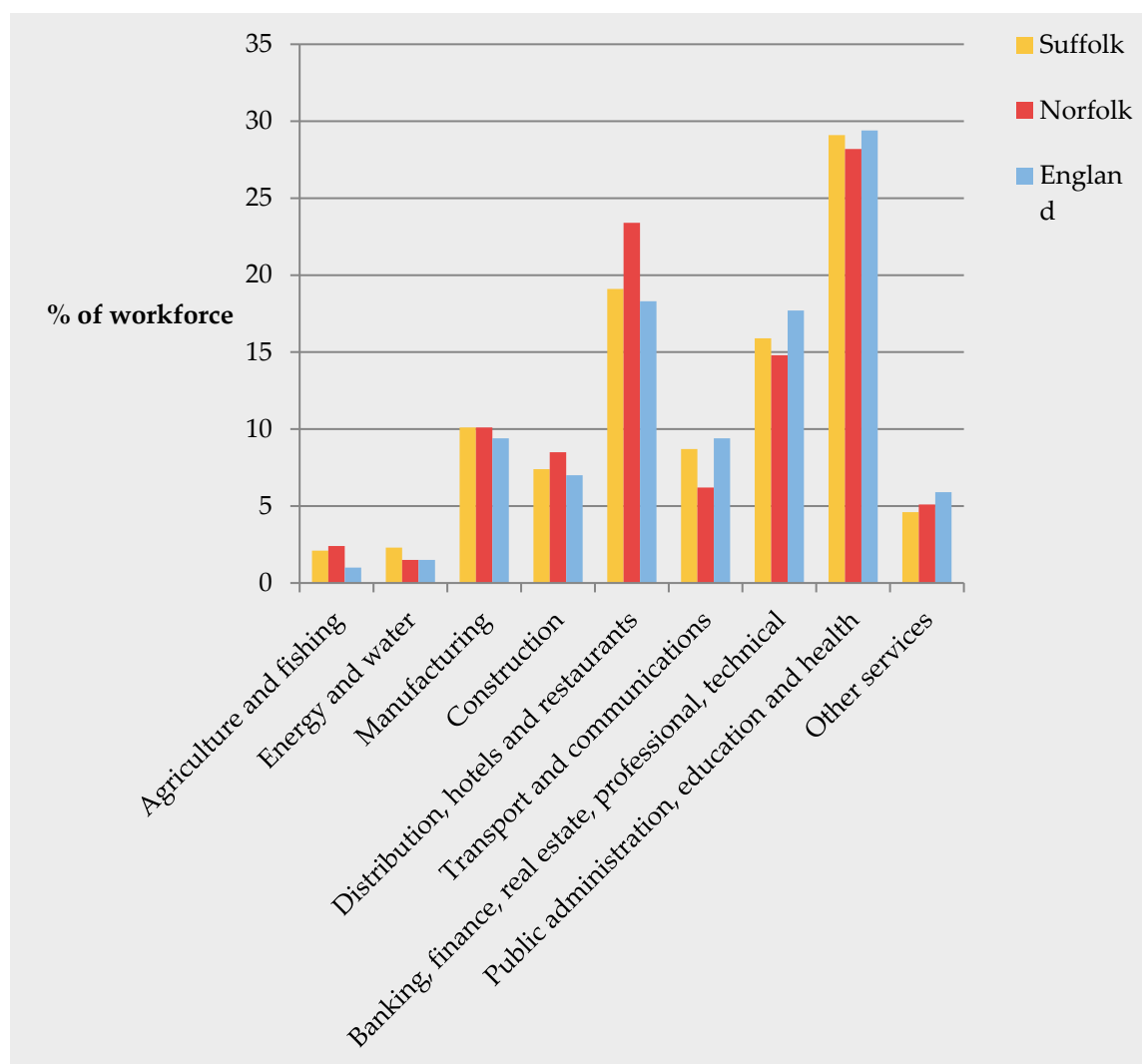
The sectoral makeup of East Anglia is broadly similar to that of England as a whole, with some exceptions (*figure 2*). Outside London and the South East, the East of England has the lowest proportion of public sector employment in the UK. There are slightly higher proportions of people working in construction and manufacturing, although the latter has been in decline.

Although a smaller proportion of the workforce is employed in technical and financial jobs than the UK average, these are still important jobs for the area. Near Ipswich, BT employs around 4,000 scientists and engineers at its research facility in Adastral Park, which is also includes a hub for around 100 ICT start-ups¹¹. The University of East Anglia in Norwich is in the top 25 universities for research¹² and is home to the Tyndall Centre for Climate Change Research. East Anglia also has the largest insurance sector outside of London¹³.

Food manufacturing

The rural nature of the area means that there are notably higher proportions of employment in agriculture and fishing, with 50% of the UK's sugar production taking place in the region¹⁴. As a result, an important component of manufacturing is in food and drink, with 7.5% of the workforce in Waveney employed in food and drink manufacturing due to the presence of large employers such as Birds Eye and Bernard Matthews¹⁵. Other key employers in the sector are Britvic, Colman's, Branston Pickle and brewers Adnam's and Greene King.

Figure 2: Sectoral composition of workforce in Norfolk, Suffolk and England



Sources: Suffolk Observatory (Annual Population Survey data), Norfolk Insights (census data)

The coastal economy

A higher proportion of people working in hotels and restaurants, energy, and fishing is also evident, highlighting the importance of the coastal and offshore economy. Tourism is a key source of employment for coastal communities in East Anglia, largely comprised of work in accommodation providers but also marine recreation. Our analysis suggests that there were 25,000 people directly employed in tourism in coastal districts in East Anglia in 2013, with the potential for 4,000-6,000 additional jobs by 2025. This also supports the wider economy, with Visit Norfolk estimating that the visitor economy supports around 62,000 or 17% of all employment in the county alone.¹⁶

Offshore energy has long been an important industry for Norfolk and Suffolk. The first North Sea gas was discovered off East Anglia in 1965¹⁷ and the area now contains 150 oil and gas offshore platforms¹⁸. According to UK Oil and Gas, around 5% of the industry's UK direct and indirect jobs are based in the East of England, with a particular concentration in Great Yarmouth and North Norfolk, where six gas terminals at the Bacton complex are located. Job numbers across the UK, however, fell by around a quarter due to the recent global downturn in oil prices¹⁹.

The sea off the East of England also hosts 70% of the offshore wind capacity installed in the UK²⁰, corresponding to 63% of the world's offshore wind capacity²¹. This is largely accounted for by the 140-turbine Great Gabbard windfarm, completed in 2013 with operations based outside of Lowestoft²², with the Galloper extension due for completion in 2018²³. Also under construction are 102 turbines as part of the East Anglia ONE project, with further projects under development²⁴.

Nuclear power is also a notable part of the region's energy mix, with Sizewell B currently running until 2035, Sizewell A in the process of being decommissioned and consultations running on plans for Sizewell C near the plants' namesake coastal village.

Finally, other key components of the coastal economy are fishing and its associated processing and retail activities. In 2014, the value of catches landed at key ports and beaches in Norfolk and Suffolk totalled £4.7 million²⁵. In the same year, majority fish processing sites in Norfolk and Suffolk turned over £53 million, generating £9 million in gross value added.

Motivated by these unique features of the Norfolk and Suffolk economy, this report focuses on food manufacturing and the sectors associated with the coastal economy, although it contains evidence and recommendations that cut across industries. This approach generates insights into how to maximise existing local assets and expertise to generate good jobs, whilst supporting workers in industries experiencing decline or rapid changes.

EXISTING REALITIES

Several features of the Norfolk and Suffolk economy affect prospects for good jobs.

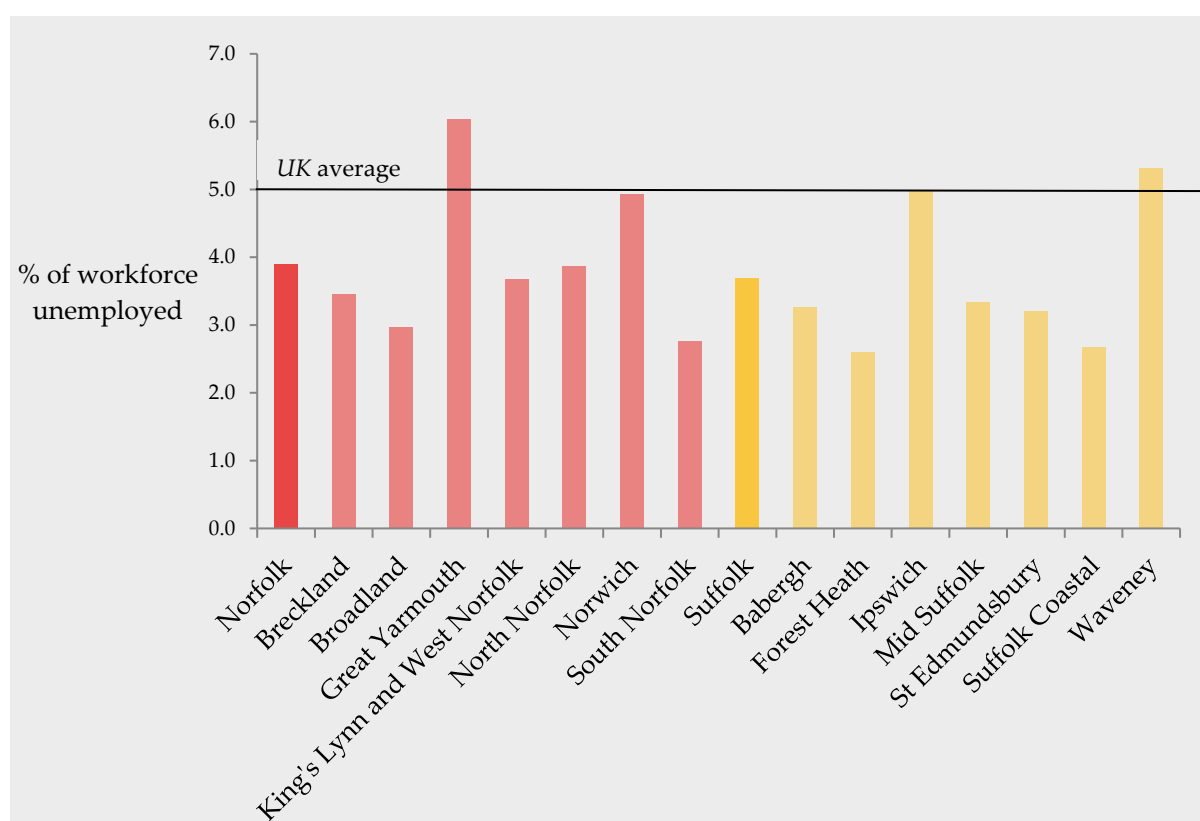
These include:

- Low unemployment, low wages, low productivity
- Manufacturing largely in decline
- An important but struggling fishing sector
- Business and ownership structures
- Brexit
- Lack of connectivity
- Front line of climate change and opportunities for green activity

An industrial strategy for the area will need to address these constraints and opportunities.

Low unemployment, low wages, low productivity

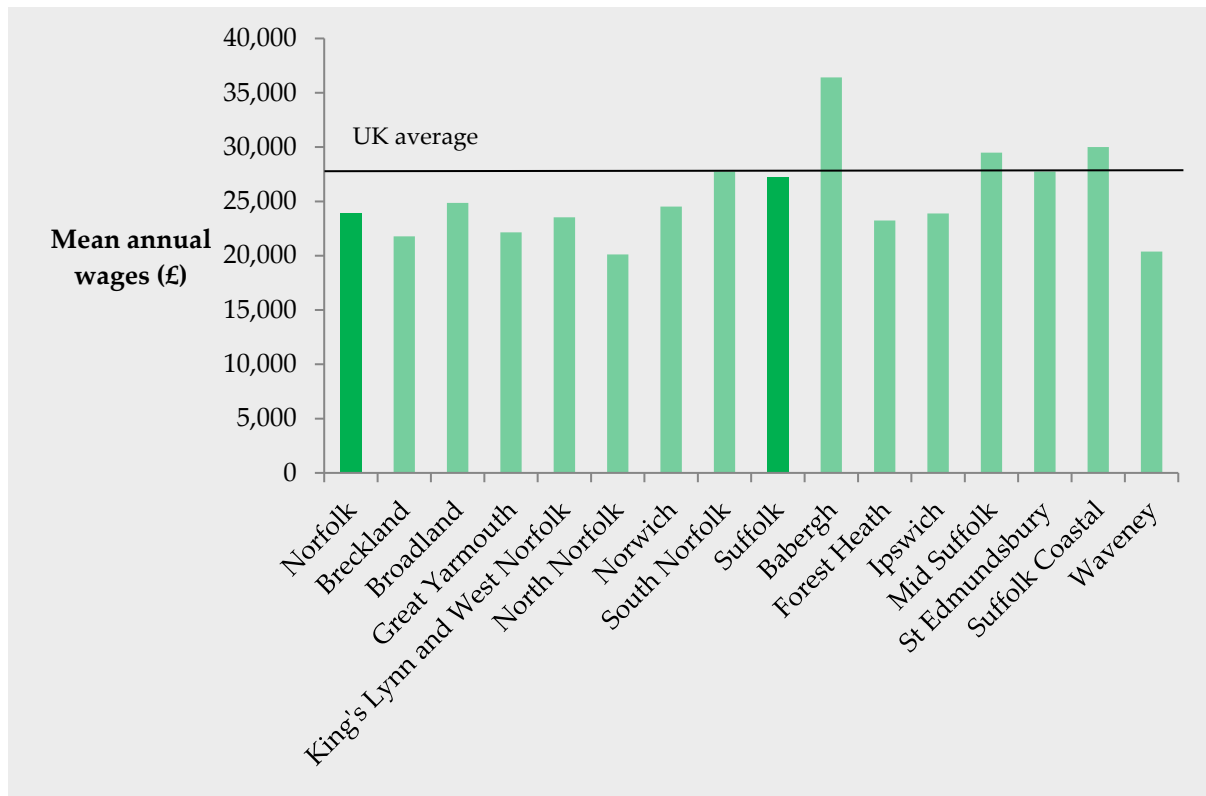
Levels of unemployment are generally lower in East Anglia than the UK average. There are, however, specific localities where it is close to or above the national average – namely, Norwich, Ipswich, Waveney and especially Great Yarmouth (*figure 3*). These areas also have higher numbers of long-term unemployed people and are the main urban centres of the region.

Figure 3: Unemployment in East Anglia by area

Source: ONS Annual Population Survey

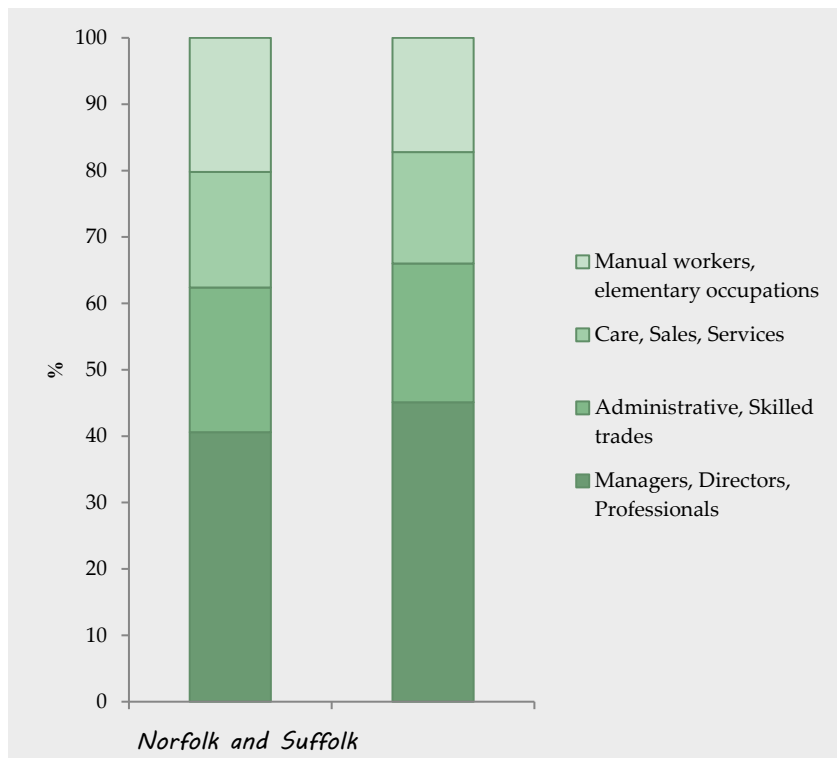
Although unemployment is low, pay is as well; only a few local authorities have annual wages higher than the national average (*figure 4*). The New Anglia LEP characterises the area as a predominantly ‘low-skill, low-wage economy’²⁶ and there is a general skew of jobs in the area towards those with lower-skill classifications, such as manual workers (*figure 5*). Norfolk and Suffolk are also characterised by the worst income inequality in the UK, as measured by the 80:20 ratio (3.52 and 3.59 respectively compared to a national average of 3.24).

Figure 4: Average annual wages in East Anglia by area



Source: Annual Survey of Hours and Earnings, Office for National Statistics

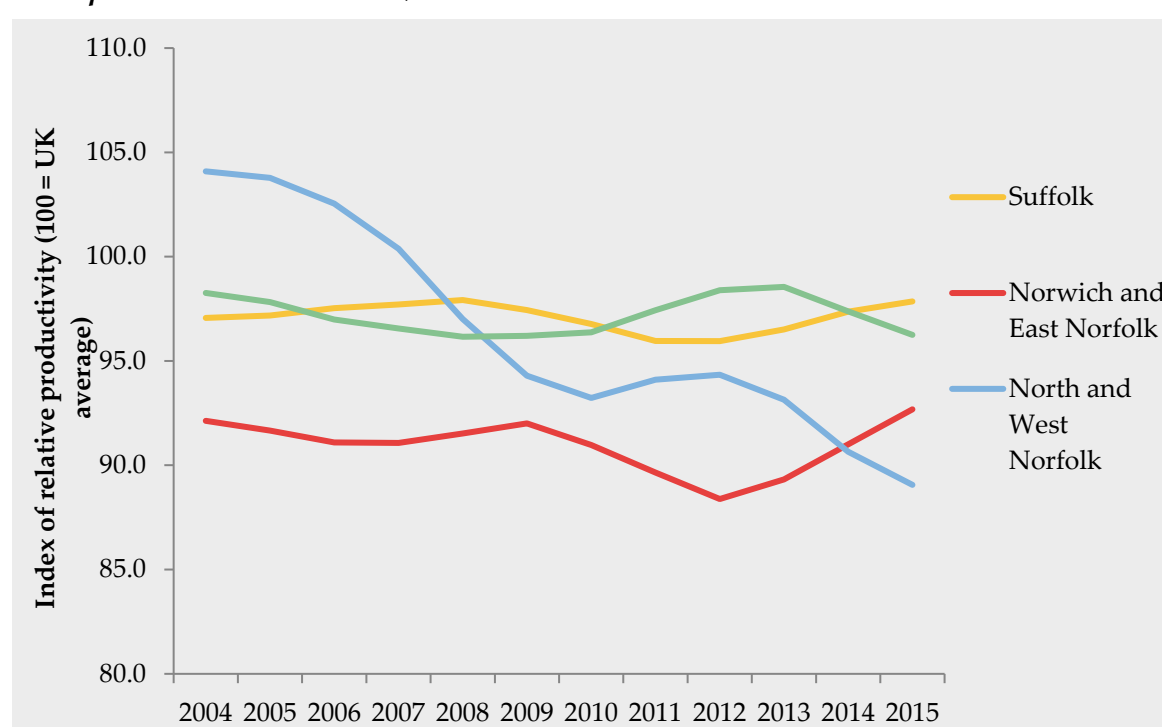
Figure 5: Employment by sector in Norfolk and Suffolk, and the UK



Source: ONS annual population survey

The predominance of low wage levels may be partially explained by the fact that the lower-skilled jobs that are more common in East Anglia tend to generate less gross added value per hour of labour. This means that labour productivity is generally lower than the UK average. Low wages and low productivity can be mutually reinforcing. Cheap labour reduces the need for employers to invest in productivity improvements and minimal productivity improvements make it more difficult for employers to increase wages.

Figure 6: Relative productivity in Norfolk and Suffolk (nominal smoothed GVA per hour worked index)



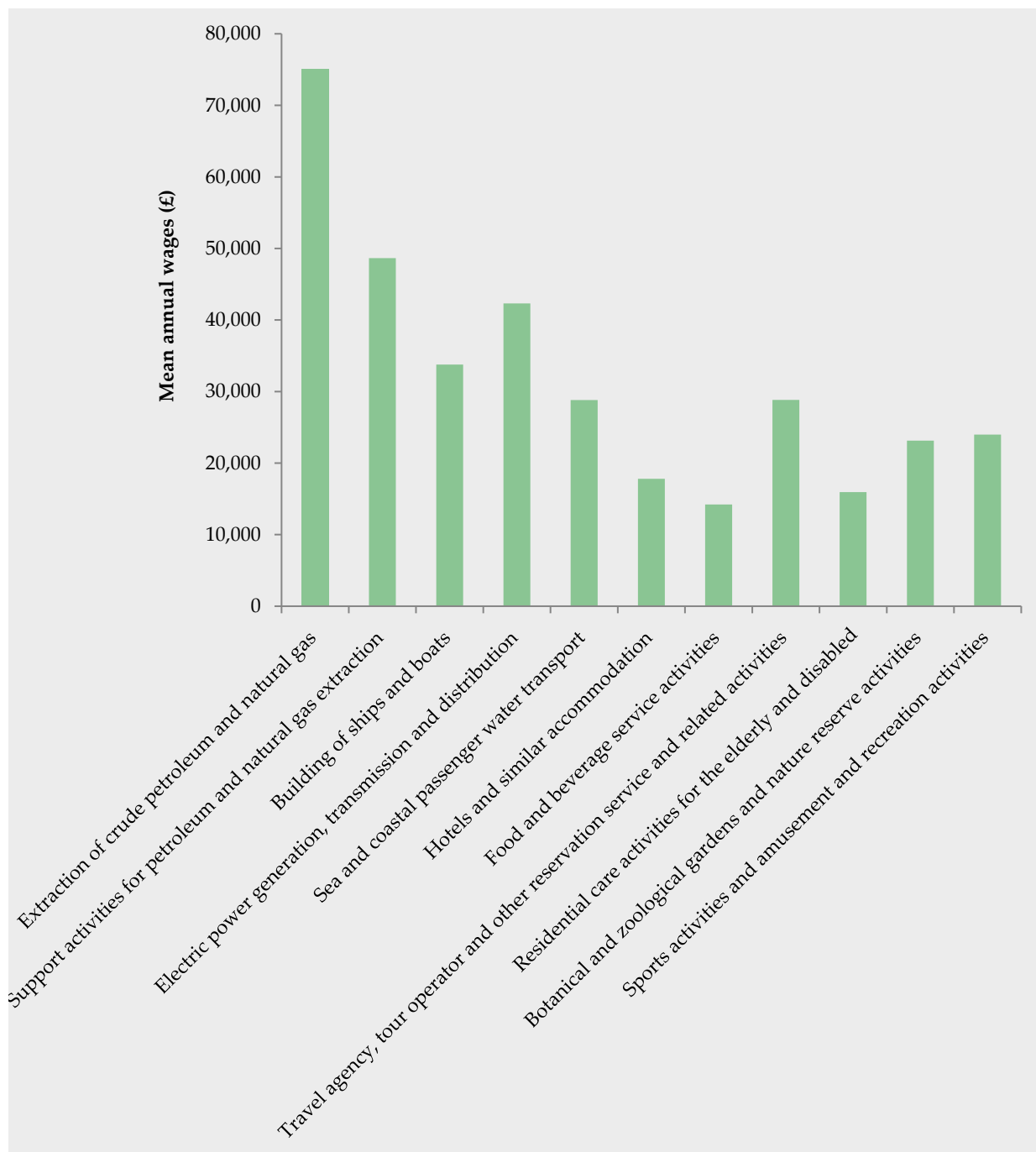
Source: Office for National Statistics

North and West Norfolk suffer from particularly low levels of productivity, having experienced rapid relative decline since the mid-2000s (*figure 6*). Looking at wages in industries relevant to the coastal economy, this could be explained by the importance of jobs in tourism and social care in the district (*figure 7*). By contrast, Babergh may be an outlier in terms of average salary due to car parts manufacturing.

The decline of manufacturing and rise of lower-productivity sectors including tourism, retail and social care has contributed to lower productivity in the UK generally compared to other countries, amplified by the fact that these low-wage sectors have

especially low productivity even compared to low-wage sectors in other countries²⁷. The next section looks at how this phenomenon has manifested in East Anglia.

Figure 7: Mean annual wages by sector



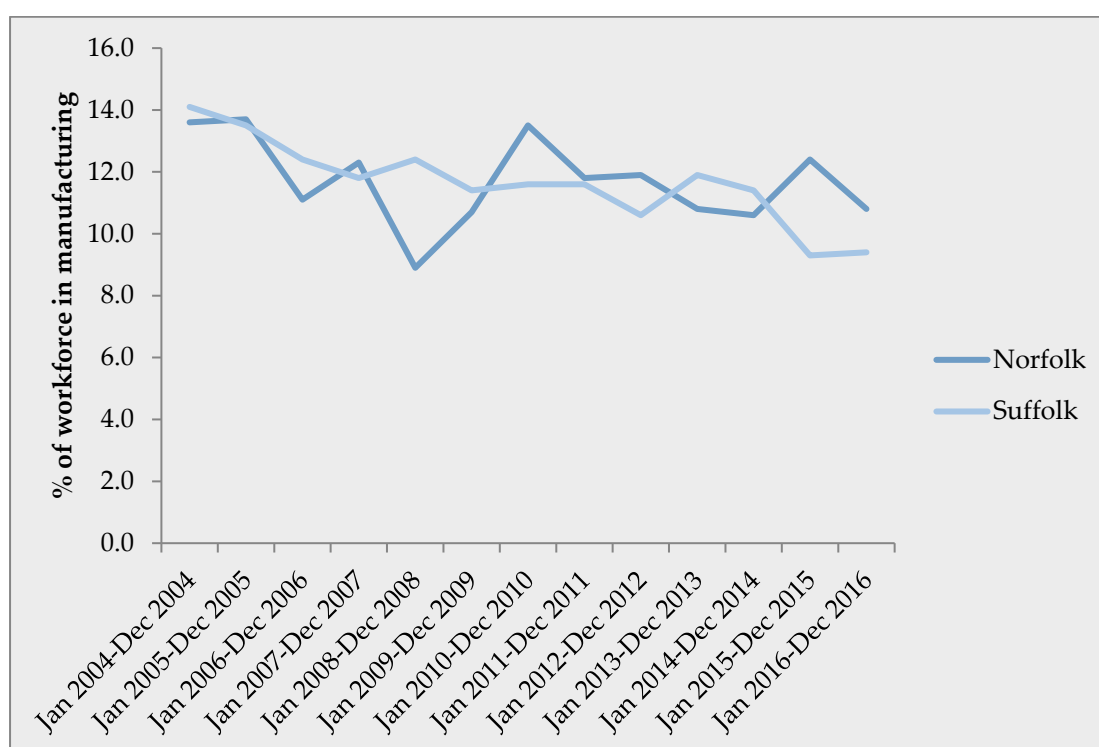
Source: Annual Survey of Hours and Earnings

Manufacturing largely in decline

Food production is the country's largest manufacturing sector, accounting for 18% of all manufacturing production in the UK²⁸ and the fact that Norfolk and Suffolk is a key agricultural centre provides a natural advantage for food and drink factories.

Manufacturing has traditionally provided higher productivity jobs to workers with limited or no formal training but the percentage of workers in the sector has fallen (*figure 8*).

Figure 8: Percentage of workforce in manufacturing in Norfolk and Suffolk

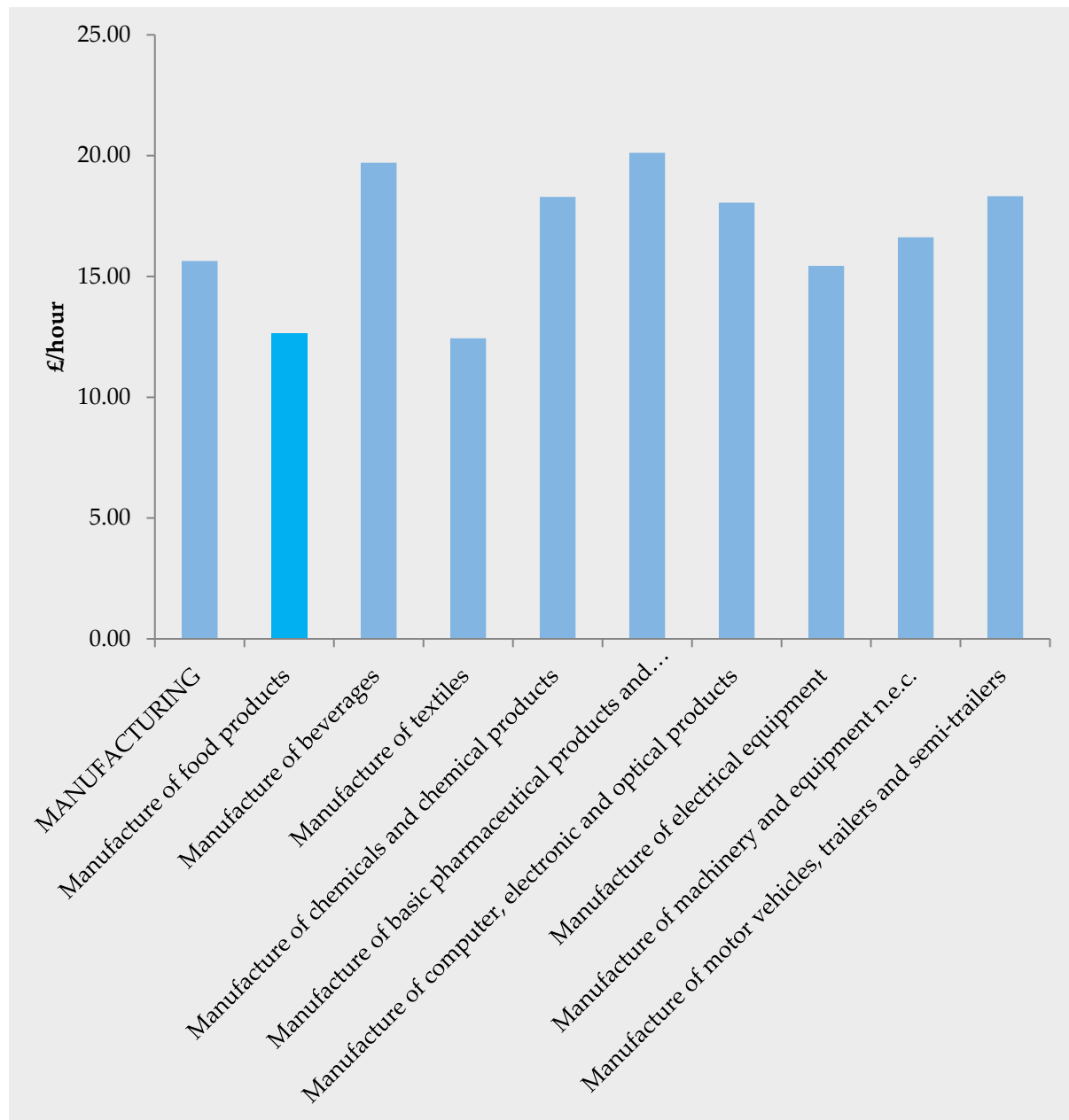


Source: Annual Population Survey, ONS

As highlighted by the recent loss of 500 jobs at Delphi Diesel in Suffolk, it is non-food and drink manufacturing that has been affected the most by this decline, often due to cheaper labour costs in other countries²⁹. Consequently, those who work in food and drink production in Norfolk and Suffolk feel that they are 'the only ones that make anything anymore' locally.

This has mixed consequences for wages in the area. In terms of the national average, food manufacturing is the worst paid whilst beverage production is amongst the best paid (*figure 9*). This divide was evident in Norfolk and Suffolk; whilst Bernard Matthews is known as a minimum wage employer, Britvic has a reputation for higher wages.

Figure 9: Pay per hour in manufacturing jobs



Source: Annual Survey of Hours and Earnings

Even companies in these sectors, however, are under pressure. Demand for products like turkey, soft drinks and burgers can be highly seasonal and volatile, often depending on the weather. Many food producers are struggling with tight margins on products due to aggressive buying techniques on the part of major supermarkets, themselves competing in their own price wars³⁰.

This means prospects for major food and drink employers in the region are mixed.

Bernard Matthews has been making large operational losses³¹ and redundancies³² and

is considered to be in long-term decline³³. Nomad Foods, owner of Birds Eye, made a very large loss around a year and a half ago and continues to struggle³⁴. Britvic recently posted some growth in margins across its business but profits were down due to restructuring and acquisition costs³⁵. Many respondents in the sector felt like their plants and jobs were under threat, with some having experienced recent waves of redundancies. Several spoke of repeated references to cost pressures on the part of senior managers.

“We don’t know whether we’re going to be here in two, three years’ time, so there’s that uncertainty over the workforce here.”

Nationally, food and drink manufacturing has lower output per hour than the rest of manufacturing³⁶ and there is an argument that increasing productivity would allow employers to increase wages in the sector. Automation could increase productivity and the government is supporting research projects with the express aim of developing robotic systems for food manufacturing³⁷.

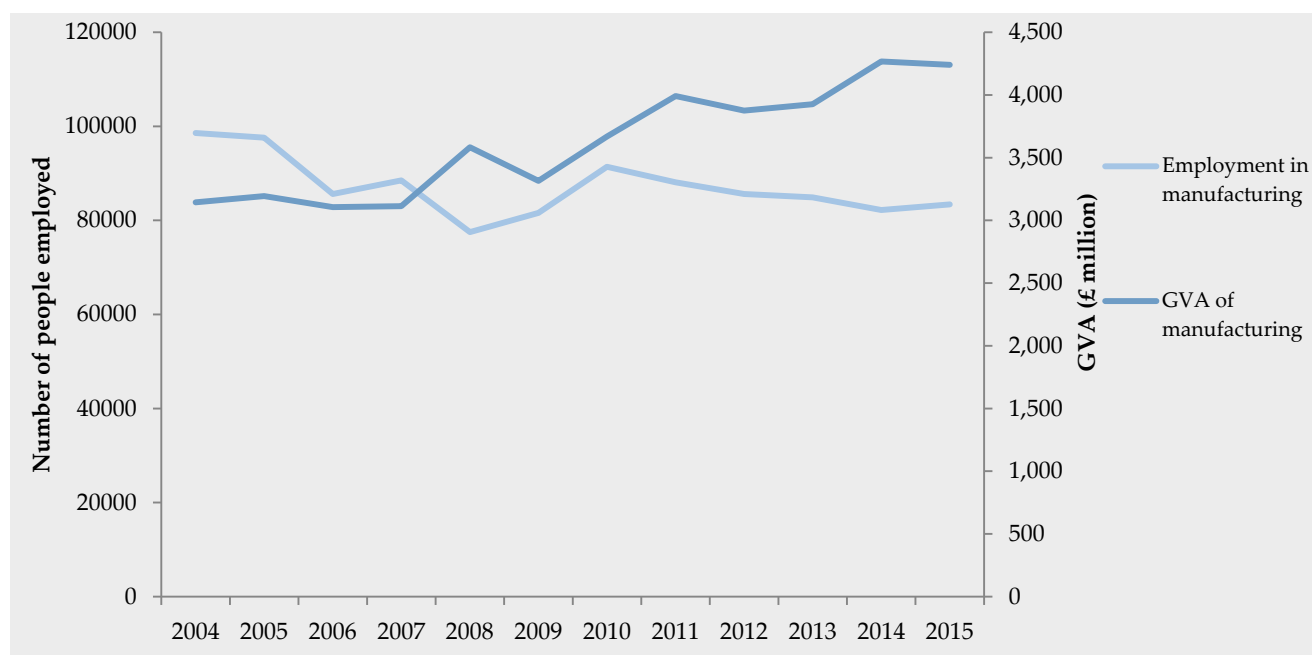
As many commentators have noted, however, this could also lead to job losses and increased levels of unemployment that could be particularly concentrated in areas such as Norfolk and Suffolk. There was limited evidence from a respondent that redundancies had occurred followed the introduction of robots on to a packing line.

More prevalent was under-investment in machinery, lending support to the idea that low wages in the area meant that food producers have been substituting capital for cheap labour. As such, most respondents did not see automation as an important threat.

“If they can’t be bothered to introduce canteen machinery or pay people properly they are hardly going to introduce robots!”

Despite a lack of investment, productivity in manufacturing in East Anglia has increased since the financial crisis (*figure 10*) and evidence from respondents suggests that this has also been the case in food and drink production.

Figure 10: Gross Value Added and number of people employed in manufacturing



Source: ONS

There was evidence that this has been achieved by a driving down of conditions (including in one instance cutting corners on health and safety) and by intense pressure on workers to produce more with smaller teams. All respondents in the sector spoke of below-inflation wage settlements and ‘doing more for less’.

*“We’re still running the same lines we were 10 years ago, with 5 or 6 people less per shift. **Same machinery, same everything.**”*

*“If you work on packing lines, ten years ago there might have been 12 people on that packing line, there’ll now be four or five **but the output is more**. So there’s a lot more work to do, there’s a lot more expected of you. You work hard and more and **more is put on everybody at every level**...not management, shop floor workers. There’s **more responsibility** for some, there’s a lot **more physical** work for others. The pay is good pay...but it doesn’t keep up with inflation.”*

*“The **machinery is 30 years old** and the new managers are demanding things are done that cannot physically be done with the machinery we have.”*

This led to many of the workers and union reps expressing feelings of despondency. All respondents had been in the sector for over a decade, and whilst they acknowledged

that food and drink manufacturing was always challenging due to shift work, they felt that pay and conditions had gotten worse.

*“It used to be a really good place to work and in some ways, you’d feel quite proud to work there because you knew it was good pay and you knew...**you felt like you got an honest day’s pay for an honest day’s work.** Now it’s not like that at all, you feel like you’re under constant barrage of stress and the money is good but you work horrible hours for it, your family life suffers for it...”*

There was evidence that workers in firms under pressure felt trapped due to the options for those with limited qualifications outside of manufacturing being low paid, seasonal and insecure work in the services industry.

*“There just isn’t jobs for people who aren’t electricians, accountants or whatever, who **haven’t got a profession.** The sort of jobs we’re in, there just isn’t many of them. Certainly not any sort of reasonable wage.”*

*“Most of the people I know from the factory now, they’re either cleaning wards in a hospital, they’re all in **service industries**...apart from the skilled engineers...The actual workers on the shop floor...**I don’t know anyone who’s come out and is better off than they were or is on the same level.**”*

In addition, several respondents highlighted the fact that because many workers were long-serving – some having joined straight from school – and believed their factory may close soon, they thought they would miss redundancy money if they moved on. As a result, the workforce in some food and drink manufacturers is in limbo, with little power or incentive behind arguments for better conditions, as redundancy payment would be necessary to supplement the poorer wages that they are likely to encounter in other jobs.

“The reason people aren’t leaving is because everybody has been there minimum ten years and they’re all expecting more redundancies, which everybody wants.”

It is important to note, however, that not all food and drink manufacturers in Norfolk and Suffolk are facing decline. In particular, there is optimism around the performance of British Sugar³⁸ and growing breweries in the area, with both Adnams³⁹ and Greene King⁴⁰ posting stable profits and expanding. This suggests that food and drink production can still play an important part in supporting good jobs in the area.

An important but struggling fishing sector

In 2015 there were an estimated 5,569 fishers in England. The industry comprises both large-scale fishing vessels over ten metres in length which generally fish offshore (541 vessels) and small-scale fishing vessels under ten metres in length, which fish inshore and are referred to as ‘the inshore fleet’ or the ‘under tens’ (2,598 vessels).⁴¹

Access to the North Sea has been crucial for the economic development of East Anglia since the region was first populated. Major ports include: Gorleston, Great Yarmouth, Kings Lynn, Norwich and Wells in Norfolk and Felixstowe, Ipswich, and Lowestoft in Suffolk. With shipping, energy and tourism all using port infrastructure, the prominence of fishing vessels in these ports has declined.

*“...Great Yarmouth and Lowestoft are now renewables energy ports and only support inshore under 10 boats, we have no more distant water fleet left. **Renewable energy** has brought a lot to the economy of Lowestoft but been to the **detriment of the fishing industry.**”*

Kings Lynn and Lowestoft are by far the most significant fishing ports in East Anglia. Kings Lynn landed around £1.7 million worth of fish and shellfish in 2014, the majority of which (84%) was landed by vessels over 10m in length. By contrast, Lowestoft landed approximately £741,000 of fish and shellfish and has 292 fishing vessels registered, of which over three-quarters are under 10m in length.⁴² Taken together, landings from ports and fishing communities in the region totalled around £4.7 million in 2014 (*figure 11*).

Figure 11: East Anglian fisheries landings data by volume, value and vessel size (2014) (Marine Management Organisation)⁴³

Port	Total landings (tonnes)	Over10m	10m&Under	Total value (£)	Over10m	10m&Under
Aldeburgh and Orford	35	-	35	£ 158,849	-	158,849
Cromer	177	-	177	£ 388,846	-	388,846
Felixstowe	37	-	37	£ 125,778	-	125,778
Great Yarmouth	109	5	104	£ 91,150	3,536	87,614
Kings Lynn	2,087	1,625	462	£ 1,695,391	1,422,800	272,591
Lowestoft	450	307	142	£ 741,538	435,950	305,588
Southwold	123	5	118	£ 162,927	3,877	159,050
Sheringham	24	-	24	£ 33,031	-	33,031
Sizewell Beach	2	-	2	£ 11,548	-	11,548
Wells	1,217	678	539	£ 1,304,823	676,232	628,591

Beyond the major ports listed above, there are also small-scale fishing vessels that are launched from beaches all along the East Anglian coast. Beach-launched fleets include those (from North to South) of: Brancaster, Weybourne, Sheringham, Morston, West and East Runton, Cromer, Overstrand, Happisburgh, Caister (Norfolk); and Lowestoft, Southwold, Sizewell, Aldeburgh, Orford, and Felixstowe ferry (Suffolk). The smaller beach-launched fleets have considerably lower volume and value of landings, in line with their fishing capacity and vessel size, and land mainly shellfish.

The vast majority of fishing vessels and the associated employment for coastal communities are in the inshore fleet. This does not mean, however, that they are the main generators of revenue for the region, as their fishing capacity and the current system for distributing fishing quotas in the UK has left inshore fishers struggling to remain financially viable. Allocations of quota were based on historical catches when

inshore fleets had no obligation to record this information, leaving inshore fishers effectively excluded.

As a result, despite supporting most of the employment in the fishing industry both nationally and in Norfolk and Suffolk, the UK inshore fishing fleet only receives 1.5%⁴⁴ of the share of fishing rights for quota species when compared to boats over 10m. Whilst the profit margins of the large-scale fleet continue to set historic highs, the small-scale fleet is plagued by low margins. In addition, most inshore vessels are not represented by regional trading bodies called Fish Producer Organisations (POs), such as the Lowestoft FPO⁴⁵, which means that they have less influence over future policy and management.

“[T]hey were left out of that initial allocation and it’s been a sorry tale of being let down by greed and political expediency and equal access to a common resource.”

*“Because of the uncertainty... their **cash flow is erratic** and they find it increasingly difficult to employ crew. It’s **hard to recruit youngsters** into the industry as there is such uncertainty...which impacts health and safety as they **have to go to sea single-handed**...compared to Scotland or Yorkshire or Wales it’s the least profitable and least dynamic of our inshore fisheries.”*

In addition, the quota of fishing in Norfolk and Suffolk allocated to larger boats is not landed in the area. In the case of Lowestoft, this has eroded the wider supporting facilities for fishing, putting further pressure on smaller boats. This highlights the interdependence of larger and smaller boats and the importance of a diverse fleet. Also, as small-scale vessels tend to fish out of small ports or rural beaches, a rebalancing of quota from larger to smaller vessels would result in a shift in activity, easing the pressure to compete with other sectors using ports.

*“The six affiliated vessels in the Lowestoft producers’ organisation have a fixed quota allocation of 80,419 units this year. That is a **significant amount of fish, but none of it is landed in Lowestoft** – 68% goes to the Netherlands and 32% to Scotland. Those boats – the *Wilhelmina*, the *Ansgar*, the *Margriet*, the *Hendriks Brands*, the *Sola Fide* and the *Sol Deo Gloria* – **bring very little if any economic and social benefits to Lowestoft.**”⁴⁶*

*“Lowestoft...was a major port with a very significant infrastructure and when the large boats... sold out to the Dutch and the vessels operated out of the Netherlands rather than Lowestoft **the infrastructure such as ice making and marketing fell away**...I think the small boat fleet suffered as a result as there is a kind of **interdependence, as the large vessels provide the continuity of supply and the smaller boats piggyback on that**. If there was an increase in supply then I think it would attract back buyers and infrastructure could be redeveloped.”*

The fish processing sector is also a significant part of the seafood value chain. The UK fish processing sector is the largest in Europe in terms of both employment (nearly 18,000 FTE jobs spread over 376 processing units in 2016) and turnover (£3.1 billion for sea fish in 2014).⁴⁷ The gross value added (GVA) of the sea fish processing industry is estimated at £554 million.⁴⁸

For Norfolk and Suffolk, in 2016 there were 11 majority fish processing sites employing 212 full-time equivalents and employment in this sector has been fairly stable. Over half of employment located at sites undertake a mixture of primary and secondary processing activity. In 2014, the estimated turnover of majority fish processing sites in Norfolk and Suffolk was £53 million, generating £9 million in gross value added (GVA). The challenge, however, is that much like other types of food manufacturing, large-scale fish processing is not necessarily tied to the area and faces similar pressures.

*“Processing can **move around and source fish from different parts of the UK** unrelated to the geography of where it’s caught so it doesn’t really have specific regional issues and they can be difficult to tease out at times...Processors are **trying to attract staff** and keep them on, it’s still quite **labour intensive** as an industry.”*

Lack of connectivity

Norfolk and Suffolk is disconnected from the rest of the country and there are serious issues with transport infrastructure. Road and rail connections were identified as poor, with journeys between the east and west of the area especially slow. This is despite recent hard-won investment to turn the A11 in to Norwich in to a dual carriageway⁴⁹ and the success of the Great Eastern Rail Campaign, which saw a commitment to invest

£476m in to the main line running between London, Ipswich and Norwich⁵⁰. The LEP has argued for increased road access to the Port of Felixstowe and improvement to railway infrastructure at the Ely junctions, Trowse Swing Bridge and Haughley junction⁵¹.

*“It’s often joked that when you’re in Great Yarmouth, the **closest bit of motorway is in Holland** because the M11 finishes in Cambridge.”*

*“There’s a fundamental geographical and structural problem with this region...Linked to that is infrastructure, the really rather **poor rail and road links** within the region are a **real break on economic activity**, particularly the time it takes.”*

This may have affected national firms’ decisions on whether to invest in the area. Respondents described how food and drink manufacturers with sites in other regions of the UK had chosen to invest in those rather than plants in Norfolk and Suffolk. Concerns were also raised over the ability of the region to facilitate the expansion of offshore wind farms and the possible construction of a new nuclear reactor at Sizewell.

*“[This] is a bit of a **precarious** site. If you look over on the map of the UK, we’re right over on the East coast, so that **costs us every time** we make something and put it on a truck...just to get it on to that **central spine**.”*

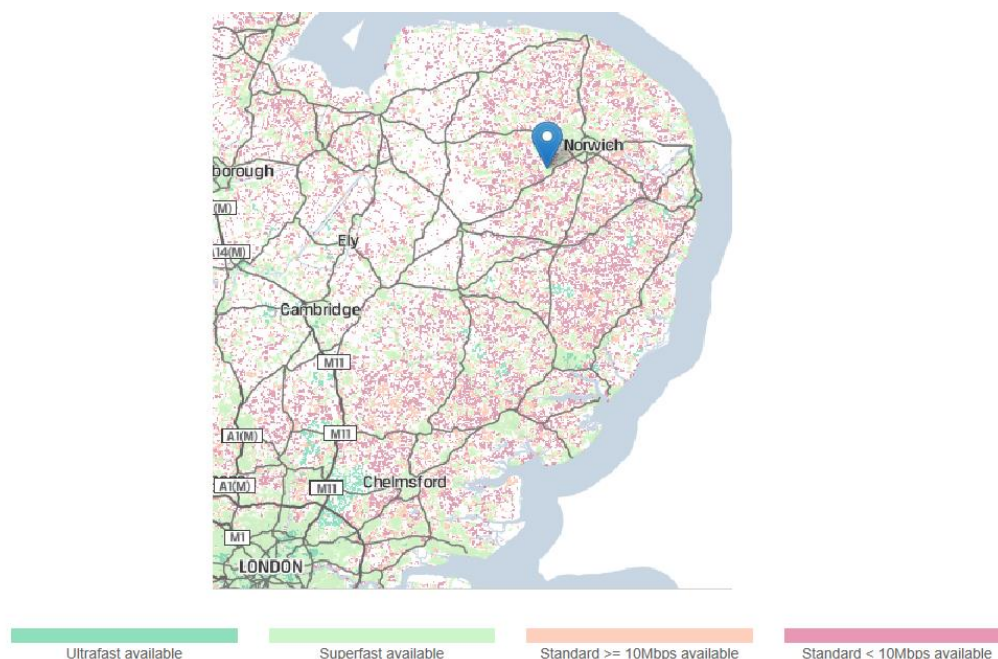
Poor public transport also reduces people’s ability to access jobs and services. East Anglia’s long coastline means communities in the seaside towns and villages of Norfolk and Suffolk are particularly affected. At least one large food manufacturer provided transport for workers living in more remote parts of the area and one respondent felt that workers’ reliance on this was a serious barrier to finding other work.

*“There are parts where people really can’t afford to live in so they might **work somewhere and live elsewhere** and that connectivity is a really important **impediment**.”*

*“There [are job] options...but it all **depends on if people have got transport to get to these other places**...[The food manufacturer] supplied transport...A lot of them have been there since they’ve left school. Because they’ve had free transport, they’ve not bothered getting the license or any alternate transport.”*

Norfolk and Suffolk are also in need of investment in digital infrastructure. There is still a lack of superfast broadband in rural parts of the area (*figure 12*). In Suffolk, 89% of the population have access to superfast speeds, whilst in Norfolk 87% do. This compares to 91% for the UK overall and the government target of 95% by the end of 2017⁵².

Figure 12: Map of access to superfast broadband in East Anglia



Source: Ofcom

This type of infrastructure is evidently important if Norfolk and Suffolk are to realise their ambitions of becoming a centre for growth in digital industries.

*“One of the advantages of computing and online enterprise and activity is **it can be done anywhere...you’ve got a good connection**. So something that comes up quite frequently is improving the broadband internet connections for enabling a whole number of different economic activities.”*

Business and ownership structures pose a challenge to good jobs

In Norfolk and Suffolk, there was evidence that some of the ownership models and corporate governance of businesses in the area pose a challenge to increasing the number of good jobs. With larger food and drink manufacturers, there was some evidence that production was highly exposed to movements in share prices that could be triggered by and amplify the impact of any shorter-term reputational issues. Some respondents felt that management decisions were largely led by these movements in investor sentiment, exacerbating the precariousness of their jobs.

*“[The] **share price had gone way down**....we had to do a huge recall. Whereby six years ago we were working seven days a week for nine months of the year **even now, all these years later**, we’re still running five days a week.”*

*“To sell the site...a [tens of millions] injection in one year...their **share price is going to soar**. So they can move the productivity somewhere else and a double whammy, get that profit from selling that site. I just think that’s a no-brainer.”*

In addition, month-by-month decisions around production, assessment of costs and as a result, hiring and allocation of hours were often highly centralised, with some head offices based outside of the local area. There was some evidence that workers involved in production often did not have a clear idea of the justification behind these decisions and therefore no way of challenging or engaging with them. One respondent explained that in one case, this has led to increased feelings of mistrust amongst shop floor workers.

*“We work on a forecast, **our forecast is worked out way in advance**... As it stands right now, we’re overselling...we’re bringing more people in and we’re overselling by a nice margin. That could fall flat at any time; we’ve seen it before, **it’s peaks and troughs**, we suddenly go mad for about a month and then it goes really quiet because everyone’s just bought loads of stock and then they’ve got to sell it.”*

*“After it had all been sorted out, the tonnage...someone did it wrong, it jumped up...There was a lot of **speculation that they’d done it just to get rid of people**.”*

The ownership structures of high productivity industries mean it is unclear how much wealth is retained in the local area. There were concerns over whether higher-skilled workers were from local communities, how much they were spending in the area and how much the capital of those making money in Norfolk and Suffolk was being invested in new digital start-ups in the area. The ownership of assets, particularly in rapidly growing sectors, is also of concern, with some respondents noting that this was a particular issue with offshore energy. For example, the Great Gabbard wind farm is half owned by German utility company RWE and Scottish and Southern Energy⁵³.

*“...if you talk to angel investors, they are investing in Cambridge, which is a phenomenon all on its own and then London... some of that **capital that’s available is getting deployed outside** of the region.”*

*“The vast proportion of [offshore wind construction] will be non-UK. Foundations, towers, turbines are **manufactured in Germany**. Siemens have a blade factory in Hull. Other parts are coming from China, Spain, Italy, Germany, Poland, **brought over into the ports and then taken out into sea for installation**.”*

In addition, the large number of SMEs, particularly in tourism and tourism-servicing sectors like restaurants and cafes, mean it is challenging for many employers and workers to coordinate or advocate for investment or policy change that would benefit them. Although these types of businesses are important to the Norfolk and Suffolk economy, they are often overlooked.

*“So many small businesses in the region are providing services for tourism or other industries that **collectively are incredibly valuable and important but on an individual basis have very little power** and perhaps aren’t seen as being particularly valuable but looking at them cumulatively, they’re incredibly important.”*

Brexit

Any formation of industrial strategy of course takes place in the context of the UK’s proposed exit from the EU. Although the parameters of Brexit are currently unclear, it is difficult to overestimate the impact that changes to trade, immigration, the national regulatory framework and the ongoing devaluation of the pound could have. A coherent industrial strategy could be a mechanism to try to cushion the negative impacts of these changes, whilst ensuring opportunities to rebalance the UK economy in a positive way are seized upon. Risks and opportunities in a given region will be highly dependent on the nature of the local economy, further emphasising the need for place-based industrial strategy. This was evident in the sectors in Norfolk and Suffolk considered in this research.

In the short term, the depreciation of the currency could provide a boost to some sectors. Tourism to Norfolk and Suffolk may experience an increase from UK residents finding foreign holidays more expensive and travellers from Holland and Germany taking advantage of the cheaper pound. Similarly, demand for products destined for export markets could increase. In Norfolk and Suffolk, there was evidence that this was true for shellfish in particular but was less the case for largely UK-focused food and drink manufacturers.

*“[The] fall of the pound helps and **fish prices are very good as most of it goes abroad**. It’s true for shellfish and any exports, immediate consequence positive but **longer term it will depend on the tariff regime.**”*

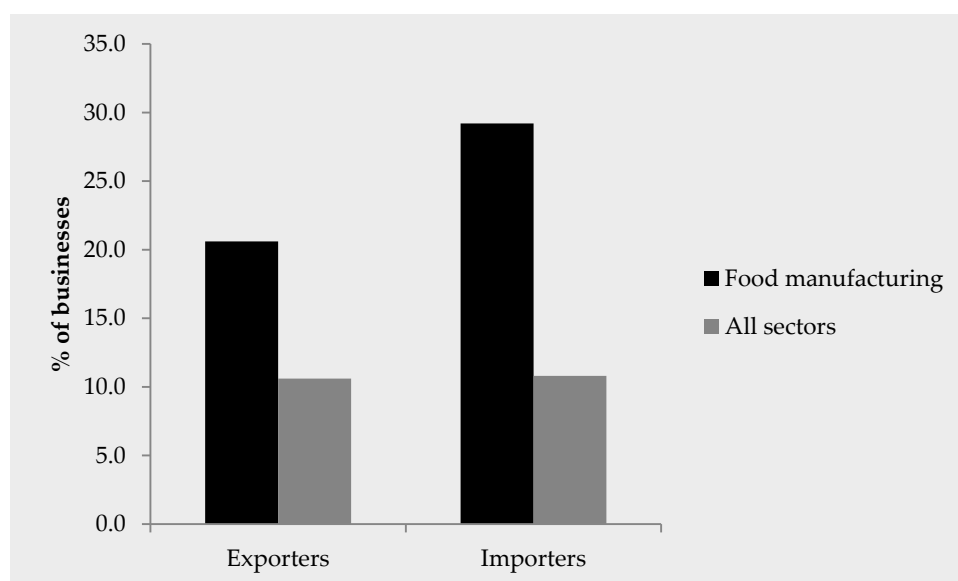
It is important to remember, however, that many of these advantages are contingent on the current low barriers to trade and immigration resulting from the UK's current membership of the Single Market. In particular, food manufacturing businesses are highly reliant on international trade, 21% of whom are exporters and 29% importers, compared to 11% and 11% average for all sectors (*figure 14*).

Some respondents said that the increased costs of imported inputs were already affecting the companies they worked for but others were sceptical that this would have that much of an effect, either because companies had vertically integrated foreign suppliers or the main inputs were sourced in the UK. In addition, around 70% of the UK seafood exports are to European markets and negotiations that result in tariffs and other trade barriers could be significant for fishermen and fish processors alike⁵⁴.

*"Our yearly **cost is estimated to be going up [by millions] per year... because all our materials come from abroad, so they've had to put a contingency in to what that's going to do to affect the cost of the site to run... We get a budget to keep that site running for 12 months and that all bites in to that.**"*

*"[A] **significant proportion of what we catch and land is exported** and if we don't get a good deal out of Brexit...I have my very significant doubts, not least as the **French and Dutch have a very significant interest in the North Sea** near these counties... they will be fighting tooth and nail to use **WTO tariffs...which would make a massive difference...so not all that glitters in this sense is gold.**"*

Figure 13: Exporter and importer businesses in the UK



Source: Annual Business Survey

Several respondents from different sectors and organisations expressed concern over a potential reduction in immigrant labour into Norfolk and Suffolk following the exit from the EU. There is a large proportion of migrants in all stages of food production; nationally, 37% of workers in food manufacturing are not from the UK⁵⁵ and 41% of fish processing workers are from the EU⁵⁶.

*“...There is a **high dependence** on immigrant labour in the **processing factories** as there is on the farms in [the area]. If you look at the country as a whole, for processing one of the **big fears is access to cheap labour.**”*

Employers seeking to keep costs low could be a key driver of migration in to the area if there are insufficient numbers of people from Norfolk and Suffolk willing to work under the wages and conditions they are offering. But some respondents in food and drink manufacturing felt that the lack of reasonably paid jobs in Norfolk and Suffolk meant that employers would easily find local workers to replace European labour.

Furthermore, a reduction in immigration does not necessarily mean wages in the area will increase but rather that firms may be pushed to invest in automation or relocate out of the UK, especially if companies are concerned with retaining access to European markets. There is some evidence that such moves are already planned⁵⁷. These options are not possible, however, for the tourism sector, where there is uncertainty over the potential impact of a reduction in immigration.

Amongst fishermen, Brexit represents a potential opportunity to increase the UK quota via changed fishing rights. But realising the benefits of a full nationalisation of UK waters is based on the assumption that all former EU-27 catches in UK waters are instead caught by UK vessels and landed into UK ports. If this were the case, the UK fishing industry would increase production by 630,000 tonnes (worth EUR 470 million). This could be unduly optimistic due to a limited capacity to catch and process such quantities and the ability of the market to absorb this catch increase without a corresponding sharp drop in price.

*“The **opportunities would be absolutely huge** if we were able to catch all the fish in...an exclusive area that we could fish off our coast. Over time we could **rebuild the herring industry**... you could build up **a fleet of boats in Lowestoft** and fish the North Sea and you could rebuild the stocks if you **didn't have the Dutch electro fishing boats** hoovering up our stocks. Whether it will happen **we don't know.**”*

Another substantial risk is the prospect of the UK attempting to increase its quota share with no accompanying change on the EU side. This situation would lead to an increase in fishing pressure that may damage the health of fish stocks. In addition, any increase

in quota would only benefit good jobs in the area if it was rebalanced towards smaller vessels. With no changes to how quota is allocated within the UK, any Brexit gains would accrue through the standard allocation procedures to fleets that currently hold quota rights.

Nonetheless, Brexit still raises the possibility for new thinking around approaches to the management of fishing. A mirroring of Brussels institutions in Westminster may simply replicate the resentment many fishers feel towards the EU management of fisheries. A new 'co-management' approach giving opportunities for fishers to be involved in management could create a new more positive relationship with fishers.

As with many regions in the UK, Norfolk and Suffolk receives substantial funding from European Structural Investment Funds. Nationally, the 2007-2013 round of these funds is estimated to have supported the creation of 24,767 businesses and 114,889 jobs. In Norfolk and Suffolk, these funds were used primarily to support the development of high-tech, high-growth green sectors and the withdrawal of them could negatively affect the growth of these more nascent projects⁵⁸. Respondents also expressed concern over the future of research funding and scientific collaboration.

*"In the scientific areas...They are enmeshed in **European and international collaborations** and funding and the guarantees that the government has given in the short term are **not providing much comfort** at all because they need to be **looking beyond 2020 for their research funding streams**. So there is a lot of uncertainty there."*

Between 2015 and 2020, £86 million from European Regional Development Fund, European Social Fund and European Agricultural Fund for Rural Development⁵⁹ has been allocated to the area. It is unclear how much of this falls under the government's guarantee to fund projects signed before the 2016 Autumn Statement and how much may not be underwritten once the UK leaves the EU.

Front line of climate changes and green activity

Norfolk and Suffolk's natural environment is integral to the area's identity and economy. It was also identified by respondents as being a crucial part of the appeal of working and living in the area.

"We're right on the eastern edge of the country...It's really nice here, it's a great place, we have a little boy...and I wouldn't want to bring him up anywhere else because there's lots of countryside, lots of fresh air, we live by the sea, you couldn't fault it."

Norfolk and Suffolk are, however, particularly vulnerable to climate change. Serious challenges such as coastal erosion and flooding due to storm surges are already being experienced and the area is under threat from rising sea levels.

*“The region’s **one of the top two or three that’s going to be affected by a whole suite of climate-related changes...** We also have some very **key infrastructure in the region, things like the Bacton gas terminal, which is on...an eroding coast.**”*

*“If you think about somewhere like Great Yarmouth or Lowestoft, **if sea levels rise by a metre in the next 100 years...you could probably build a wall to keep Lowestoft safe but the cost would be astronomical and as soon as you have a centimetre more sea level rise it’s all pointless and for nothing. If you actually want to keep people living...in the low-lying bits then something much more radical needs to be done.**”*

On the other hand, the area is well placed to become an exemplar of how to transition to a green economy. According to the ONS, the East of England already has a lower carbon footprint than the national average⁶⁰. The importance of energy generation in the area means investment in the sector in Norfolk and Suffolk has implications for how low-carbon the energy supply is to a much larger area of the country.

*“Without East of England, **the lights and heating would go out in London and the South East, the Midlands, and the South West.** But government doesn’t remember this.”*

The recent downturn in oil prices and resulting redundancies shows that a transition to an energy industry less exposed to global and volatile commodity prices would be good for jobs as well as helping the UK meet its climate commitments. Oil and gas, however, remain important to the region and although these jobs are ultimately environmentally unsustainable they are nonetheless mostly high-skill, high-wage jobs. Any transition to a low-carbon economy must recognise this and work with the people currently employed in this sector in a constructive way.

*“It’s a question of **where are you now and how can we start along the journey of reducing environmental impact.** There’s nothing more guaranteed to put people’s backs up than saying **you work in a bad industry and you need to work in this good industry.** It’s an **ill-defined and emotional concept.**”*

What one respondent described as the ‘booming’ industry of offshore wind demonstrates how the development and installation of clean energy can bring high-skill, high-wage jobs to the region and could potentially absorb workers from other industries. In this respect, not bringing more of the clean energy supply chain to the UK would be a significant wasted opportunity.

*"I feel this government and other governments have **missed a really big trick**...Great Britain is renowned for innovation and manufacturing...why don't we make wind turbines? Why aren't we making solar panels?...The amount of work that would generate, not just by making them but by **installing, fitting and maintaining** them would be **enough to keep the industry side of the UK going** for the next 30, 40 years because that's **such a big project**."*

Additionally, the decommissioning of oil and gas and nuclear facilities in the area represents a big opportunity but requires an active role to ensure businesses and workers in the region benefit from this, including investment in specialist infrastructure at ports, transport infrastructure and a focus on the skills needed by local people to access the new jobs. The role of national government was acknowledged in the Conservatives' 2017 manifesto, where they pledged to "work with the industry to create a multi-use yard and the UK's first ultra-deep water port to support this industry"⁶¹.

*"**Decommissioning will be a huge cost and spend** over coming years. There is a danger that the work will go to firms abroad in Belgium or Holland. **It should be done here**. Barriers to that happening are things like **heavy lift vessels**...the UK doesn't have any...and **port facilities**... we need **a specialist facility** to handle these platforms and take them apart for materials to be smelted and re-used."*

It is not just the energy sector that offers opportunities for green, good jobs. Respondents identified technology and methods for natural resource management and climate adaptation as areas that Norfolk and Suffolk are already leading in. Rethinking business models, supply chains and the connections between sectors could also boost sustainable jobs that benefit the area's communities. The Green Economy Pathfinder board convened by the LEP was highlighted as a particularly important initiative that required further support⁶².

*"...These problems are intense in this region in the UK but they're common to many places around the world. So **if this region leads the innovation** in housing, transport, communications and adaptation, the business of sustainable development, then **that could be a major export** for the region."*

*"We import about 75% of our seafood, a lot of which is from the southern hemisphere and the carbon footprint is massive. We want more people to **buy local fish from local ports**...this would **also improve the fisherman's lot**...There is **less carbon involved in fishing and eating local fish** than any other protein source."*

THINGS TO CHANGE

Quality of work

Despite historically low levels of unemployment, stagnating real pay and the rise of flexible forms of work has led to concerns over the quality of work in the UK. As the recently completed Taylor Review of Modern Working Practices notes, the nature of people's work impacts not only on their individual wellbeing but also on how productive our economy is overall⁶³.

Unfortunately, there is evidence of an erosion of conditions at work and workers' ability to improve them in Norfolk and Suffolk. Multiple stakeholders spoke of a rapid increase in the use of agency workers in food and drink manufacturing, alongside flexible contracts with a set number of minimum hours that are added to as demand fluctuates.

From the employers' perspective, agencies represent a way to minimise fixed labour costs in an industry where demand is volatile and seasonal. Some respondents, however, felt the use of agency workers was disproportionate and was a deliberate attempt to avoid costs associated with the imminent closure of declining plants.

*"We have a running cost for each site...we can **only employ a certain amount of people because that's part of that costing**...if we got an extra 20 people in it would make their life a lot easier but the cost of our product would go through the roof and wouldn't be comparable, **not competitive** you see."*

*"You've always got this threat hanging over you because you've always got these agency workers that **you can make redundant free of charge**. Essentially now we're finding the permanent staff are going down, so it would be **cheaper to shut us down**, so there's always that threat hanging over our heads."*

Agency workers were occasionally taken on as contracted, permanent workers, though this appeared to be highly contingent on the short-term situation of the business and there was little evidence that this happened often. As workers retired, they were often replaced with agency staff rather than traditional full-time employees.

*"We've had people leave because they retire...and **rather than replace them we bring agency in** and get them trained up and as soon as **they give us the thumbs up** that we're in a **better place with our cost** we'll take some people on to fill all the skills gaps you see and they become permanent members of the team."*

Several respondents felt that frequent fluctuations in staffing and a dislocation of hiring decisions from site-level management has meant work on a line is less efficient and less safe. There was evidence that large food and drink employers tend to limit training for most on the shop floor, including agency workers, to what is needed for health and safety reasons. Many respondents felt that this was inadequate, as the short-term nature of some agency staff meant that they did not have enough time to become accustomed to their work and that this could be dangerous.

*“The training courses are...if you’re doing a role that needs that we’ll make sure you’ve got that and that’s offered to you...It is all tailored to where they’re working, **so if an agency guy is working in that area, he will be trained just like every normal operator around him.**”*

*“The agency staff have no training, **they’re literally dumped in with you**, they’re not even introduced to you...They don’t have a clue what they’re doing, they might not even speak English, which is quite usual and **you literally are carrying people and it’s very hectic.**”*

Whilst it is possible that some agency workers may also appreciate the flexibility of their working arrangement, there was evidence that agency workers had experienced hardship due to not being allocated enough hours. In addition, they could be constrained in how much they could work by being reliant on means-tested in-work benefits to make ends meet. In this way, insecure work contracts could lead to a less flexible and efficient workforce as well as individual adversity.

*“In the past, the **agency people at Christmas time had to go to food banks** because there wasn’t enough work for them.”*

*“A lot of the agency people because of being on **such low wages** they claim family tax credit, so if they were to do more hours like the rest of us do, **that would mess up their family tax credit.** So of course you lose that flexibility, which **puts more strain** on the guys who are permanent.”*

Permanent staff also felt that the precarious nature of agency work meant that it was hard for agency staff to say no to unreasonable demands or argue for better conditions. This has resulted in even permanent staff, who are ostensibly better protected, feeling under pressure and resentful towards their agency counterparts.

*“Agency people **don’t try and push things** more because they’re on zero contract hours and the company at any time can say **I don’t want those people on site**...It’s a bit different for the flexis but they’re only guaranteed [a set number of hours] and if the same goes there...**if the company don’t like them, they’ll say give them less shifts**...People don’t push things because **they’re frightened** of losing their jobs or losing their hours.”*

*“The flexis are always really **keen to do things, cut corners**...they just want to get a decent living. Then the company is expecting everyone to work like that, so people are running round like headless chickens **just to show they’re worthy of a better paid job and it just makes it worse for everyone else.**”*

There was a general sense of a breakdown in relationship between workers of all types and management, including a lack of clarity over conditions and unilateral decisions around pay. In one case, this limited the impact of the National Living Wage, as the employer included bonuses in the calculation of average daily rates at the same time as making them more conditional.

*“Management **have become a lot more petty** in disciplinaries...The level of professionalism amongst managers is crap. A lot of managers we have are promoted from the shop floor...they don’t pick a good honest person who’s going to try their best, **they pick a yes person** who’s going to do what they’re told.”*

As unemployment continues to fall, the erosion of conditions in some food and drink factories could be dissuading people from applying for these jobs, even if they are well paid. This could lead to a vicious cycle of a ‘crowding out’ of full-time employment and increasing reliance on agency workers. There was some evidence that this has an effect on companies’ ability to fill higher skill roles.

*“For what the company offers, there does seem to be this **lack of people with the right skill set**...I do get a little bit despondent...I would have thought people would be clambering to get into a company like this.”*

*“**If an engineer left they would struggle to get a replacement because of the reputation of the place**, people obviously talk and they know that maybe the money’s good but the job itself, what they have to do, isn’t that good.”*

Alternative options to food and drink production, such as work in the care sector, are also insecure. Work in tourism is seasonal and tends to have few permanent roles, with one respondent highlighting the fact that it was difficult to accommodate the influx of workers and guests in high season.

*“A lot of them have just gone part-time work, which is like caring and shop work. There’s **not an awful lot of full-time work** about here.”*

The Taylor Review makes several useful recommendations to attempt to protect workers from the exploitative use of flexible working arrangements. These include a premium wage for non-guaranteed hours and a right for those on zero hours contracts to request a more permanent contract⁶⁴. Whilst a useful starting point, given the power

imbalance between workers and employers, these measures would need to be strengthened to provide real protection, particularly those employed by agencies.

Skills: labour market base and where people are at now vs 'growth industries'

The education sector in Norfolk and Suffolk is currently not equipping young people with the training needed to power the growth of sectors such as renewable energy, digital industries and data science. The most common skills gap in the area identified by respondents was a deficit in engineers of differing qualification levels and specialisations. This is despite some recent initiatives lead by the LEP such as the 'Fabric First' programme to spread energy-saving construction skills⁶⁵.

*"...there's a need for engineers. Actually, the further education system recognises that but is still **turning out people for a 20th century economy**...Construction is still big, photography, hairdressing, hospitality...Now I'm not decrying any of those career choices but the engineering element isn't coming through strongly enough."*

The context of this mismatch is a real-terms cut of 13.6% to the 16–19 education budget between 2010 and 2014-15⁶⁶. Part of this cut is associated with the replacement of the Educational Maintenance Allowance with a smaller 16-19 bursary programme. In addition, the Adult Skills Budget for those aged over 19 was cut by 11% between 2014-15 to 2015-16 alone, with the non-apprenticeship component around 23% below 2014-15 levels in real terms. Some of this funding has been replaced by education loans⁶⁷.

Both Great Yarmouth and Lowestoft Colleges were subject to financial notices of concern and as per the recommendations of the Norfolk and Suffolk area review, are in the process of merging⁶⁸.

Apprenticeships and technical education will play critical roles in ensuring that young people are able to access quality work and industry has the skilled workers it needs. Nationally 60% of apprenticeships are level 2 or lower, with little or no opportunity to progression to level 3 and therefore little lifetime impact on earning power, and many are being used to train existing employees. At worst, opportunities described as apprenticeships are in reality bad jobs with poor pay and no prospect for progression. Government reforms to integrate apprenticeships and technical education through the creation of the National Institute of Apprenticeships and 15 technical education routes

are welcome given the need to simplify and raise the quality of apprenticeships. The absence of trade union input in the process is an omission in comparison to other successful European technical education systems which ought to be rectified.

One important way to address the skills challenge is to develop earlier and more meaningful collaborations between education institutions and employers to contribute to the development of higher quality apprenticeships and technical education. Government at a national, regional and local level has a role to play in brokering relationships and encouraging best practice. To make this work for the two counties, local governance structures need to have formal links with national sector bodies to make sure that apprenticeship and technical education provision responds to the long-term needs of different industries.⁶⁹ It is possible over time that 'local institutions could play a more formal role regulating the quality of training, conducting assessment procedures, and helping employers and colleges to adapt the curricula of training programmes set nationally to local context – as they do in other northern European countries'.⁷⁰

One local example of best practice is the Energy Skills Foundation Programme at East Coast College on their Yarmouth and Lowestoft campuses. It is a one year pre-apprenticeship scheme developed in response to attrition rates experienced by employers of young people leaving part-way through an engineering apprenticeship. The scheme has been successful in lowering attrition rates and is therefore keeping more local young people on the pathway to engineering work. In relation to universities, as one respondent pointed out, the Teaching Excellence Framework means that there are incentives for universities in the area to engage with business but the reverse is not necessarily true. The importance of the visibility of key growth sectors in communities and schools was also raised.

Retaining university graduates is another challenge for the area. The East of England is the worst UK region in terms of retaining graduates that are originally from the area⁷¹. In Norfolk and Suffolk, there are net outflows amongst people over the age of 25, with respondents reporting that graduates tended to do their first job in the area before moving on to a large city. One interviewee linked this to a lack of cultural amenities in Ipswich.

“Graduates tend to go to the bright lights of London, Leeds and Manchester and do not return until they start their families about age 35 to 40.”

The current focus of skills investment in Norfolk and Suffolk on equipping young people to work in green, high growth areas is of course important. There was however, limited acknowledgement of the skills needs of those already in work, especially those who have been working in declining sectors for some time. This could have serious consequences for the financial stability of a significant number of households living in the area and hamper their ability to share in the benefits of economic growth.

*“...Not being prejudiced and there are always outliers...but mainly the people who are working in food manufacturing are **not going to be the ones working in biotech.**”*

*“When I started there, come out of university... in to this job and **they pay you a good wage, you don’t leave, you stay...**but now I’ve got to a point where **I haven’t got a profession** and I’m too old really to learn one. So for someone who’s in their twenties, then maybe training is the answer...but for people like us... we’re just **a bit too young to retire and a bit too old to start afresh.**”*

Moreover, there was evidence that employers could benefit from the skills held by the current workforce. Examples include informal skills that could be transferrable from food and drink to wind turbine manufacturing and maritime skills gained through fishing that are relevant to offshore energy and tourism. The loss of jobs at Delphi in Sudbury, redundancies in oil and gas and the number of fishermen going out of business highlight the risk of losing the expertise of more senior workers due to not actively managing struggling sectors.

*“There are a lot of people who couldn’t cope with, for example, **shift work**. They couldn’t cope with a relative amount of **monotony**, that sort of environment that we work in. So I think if you’re used to that...you can **take that into another manufacturing environment...**”*

*“With the increase of the renewables industry – even in the 70s the oil and gas industry – **our fishing skills were immediately transferable to the energy industry.** I bet the vast majority of those guys running the marine support and supply services come from a fishing background, it’s a **nursery for maritime expertise** that shouldn’t be forgotten.”*

*“It’s not just physical training it’s also **mentoring**, it’s the knowledge and experience of fishing grounds and the historical knowledge and that **takes time to understand**. Once the older fishermen go then that **chain breaks and the knowledge is lost** and you have a far **less efficient and more damaging industry** as it’s not able to be finely tuned.”*

The barriers to retraining for adults were highly practical; they were largely time pressures and a lack of financial support. These were especially an issue for those who already have families and mortgages. The Open University model was raised as a useful, flexible approach but the increasing costs of courses has meant that they are less accessible to those on middle-to-low incomes.

*“I **couldn’t go back** and go into college or anything like that and not earn any money, I would **have to go and earn** some money somewhere, **otherwise I lose my house**.”*

*“The reason I don’t do [training] is cos **I got a family, I’m working shifts**, on my weeks off I’m usually in one or two days, union business sorting things out.”*

Some respondents emphasised the importance of an active industrial strategy in providing some measure of stability for those transitioning between industries by actively linking people with training and jobs.

*“You can’t do it overnight, so there has to be a plan, some **investment underpinning the plan and some certainty that the path will be stuck to**...Lots of our members expect to have to change jobs, develop their skills throughout their careers but we’ve **got to give people some certainty** about what that pathway might look like for them and their **ability to plan their own lives around it**.”*

Trade unions can play a crucial role in this process. There was evidence that union representatives can be motivated and well placed to understand the needs of members who may be exiting their workplace. In this example, highly tailored and empathetic support on the part of a rep enabled a worker facing long-term unemployment due to disability to start their own successful business.

*“...**We went through different stages of the process helping him out** with work stuff...We’re talking about a young man, **had been fit as a fiddle**...then all this happened to him. He’s got a love of animals as well. So with the money we managed to get when he got pensioned off, he had a lump sum, with the training that he done that was funded completely by [a charity] **he’s now got his own little business**...where he does*

*hydrotherapy for dogs, which has got a double effect; **he's now self-sufficient, he's earning money** but also he's spending most of his working day in hot, warm water, which is **helping his condition no end**. That was a real **success story**."*

Coordination between sectors and organisations

Norfolk and Suffolk has many types of industry and sectors that are highly interdependent. An example of a mutually reinforcing and supportive dependency highlighted by several respondents was the link between coastal tourism and small-scale fishing. This shows how parts of the economy in Norfolk and Suffolk that make a smaller individual contribution to the area's GVA can still be crucial to economic activity in other sectors. An important part of an effective industrial strategy for the area will therefore be identifying and building these links.

*"Administrators don't seem to realise that a **scattering of small boats on a beach doesn't seem like much** but you lose much more as tourist come for that, it's an **integral part of the tourist experience**. So then you lose the tourism, then you lose the shop and the hotel and before you know it the local school has gone."*

*"...rather than seeing those as **separate management units** and separate sectors, really think how the activities you do offshore could benefit, for example, **multi-use systems**. So you're farming algae as fertiliser amongst the wind farms to put on your fields on land. We're thinking about more **integrated practices** that also help **share the wealth from these big activities offshore on land**."*

Conversely, there were several examples of missed opportunities and issues arising when different organisations were not able to work together. This was generally a result of unintended consequences of policy decisions, including inefficiencies in national offshore training certification and data protection rules that make it difficult for statutory bodies to work with the third sector. This suggests a need for an efficient process whereby local actors can flag issues with national regulation in a systematic and coherent way.

*"There isn't always a good connection **between institutions and organisations that are actually trying to deliver** sustainable development. They're **constrained because they can't easily work together** and data share and all these issues."*

*"How can oil and gas and renewable organisations work together? At the moment they don't. They have **totally different training and operating schemes**. The **Health and***

***Safety Executive** treat them totally differently...the **Civil Aviation Authority** deal with them separately, in relation to helicopters... We've seen 10,000 redundancies in the oil and gas sector; one of the issues we have faced is people losing jobs in hydrocarbons but being told they **don't have the right qualifications for working offshore, when they have been working offshore for the last twenty years.**"*

Another key reason why different organisations struggle to collaborate is that partnership work is often under-resourced. Many people in Norfolk and Suffolk have innovative ideas on how to work together but do not have the capacity to do so, with barriers arising as partnership work is neither parties' core function. For example, despite the importance of universities and businesses coordinating closely to meet skills needs and diffuse research, difficulties were identified due to different time scales in funding and business models in the two sectors.

*"Partnership working is something that **everybody's keen on**...but in the public sector, we're constantly being squeezed to do **more with less** and in the private sector, everyone has their **core business** that they have to get on with...doing this kind of **partnership working always ends up being edge of desk**. Therefore, there's a lot more talking than action... to really delivering solutions in this region and elsewhere, **there needs to be top down investment in building the partnerships and putting the time in to making those partnerships work.**"*

Governance structures

To achieve change on any of the above domains, there is a clear need for a well-resourced coordinating body. There is considerable appetite in Norfolk and Suffolk for a greater devolution of not only funding decisions but also other administrative powers. For example, respondents described the need for regional or small-scale Fish Producer Organisations. Some suggestions for principles that these new organisations could follow are outlined in NEF's Blue New Deal⁷².

"There has to be appropriate scrutiny and that can be at a local level and those people are held accountable rather than money coming down on a loaded and coded basis; "You can have this money and you can determine where it's going to be spent but we would really like it spent in this area, this area and this area." I think you want... more devolution and accountability."

Respondents also emphasised the importance of long-term and strategic planning, especially in terms of investing in an environmentally sustainable way. This ranged from planning infrastructure and towns in a way that would be resistant to flooding in the long term and helping families when the value of their homes were affected by changes in coastal management policy. This requires consistency on both a regional and national level; for example, for the offshore wind sector in Norfolk and Suffolk to grow, central government needs to provide assurance that the subsidies regime for the sector will remain stable.

*“There was a hold the line policy and then it suddenly switched to do nothing...People that have **bought houses** on the **understanding that their houses were going to be protected** indefinitely were suddenly in the situation where it wasn’t...So people who’ve just got a mortgage might suddenly be in negative equity and **unable to move because of a policy change.**”*

*“The political system...the time scales at which things are being planned and implemented **do not have foresight** in an area where this is an expectation of great environmental change.”*

As highlighted by the Industrial Strategy Commission, basing decisions on commonly used cost benefit methodologies may undervalue outcomes that are important to future socially just prosperity⁷³. This is particularly important when it comes to managing the environmental and social assets that exist within Norfolk and Suffolk.

*“...Actively taking into account in economic analyses of **the value of our ecosystems services** that we have here...natural capital that is huge for tourism, for wellbeing, for coastal defence. The value of a salt marsh in providing coastal defence for example...carbon sinks, all sorts of things. **It’s really important but it’s not fundamental to the way that our economic system works.**”*

To be effective, any co-ordinating body in Norfolk and Suffolk must engage a wide range of stakeholders in a meaningful way. In particular, the voices of ordinary workers, small business owners and the third sector appear to be missing from conversations at both the national and regional level. There was some evidence that this could help repair feelings of mistrust between workers, management and communities and business in general.

*“This has to include business in some way but this needs to include people with no personal interest. Maybe **ordinary people on the street, people like us.**”*

Following the collapse of an East Anglian devolution deal, the only cross-county organising structure in Norfolk and Suffolk is currently The New Anglia LEP. Its remit is to ‘lead economic growth and job creation in the local area’⁷⁴. To this aim, a number of sub-committees provide guidance on how to invest millions of pounds obtained from central government via a Growth Deal, with the LEP board making the final decision on what projects to fund.

The New Anglia LEP is well regarded by stakeholders and is committed to working in a collaborative, multi-sector way but it suffers from a number of structural limitations. Its board is comprised of leaders from the private sector, county councils and further and higher education but there is a lack of real engagement with other third sector organisations or the workforce, who have no formal input into its decision-making processes. A local example of a structure that does incorporate these voices is the East of England NHS Social Partnership Forum, which brings together commissioners, NHS employers and trade unions⁷⁵.

The LEP, however, struggles to invest in cross-sector partnerships as it is constrained by a lack of capacity and resources. This can affect how projects are prioritised and the visibility of the LEP as an organisation; for example, several respondents such as union representatives and owners of small fishing businesses were unaware that it existed. Central government control means its core budget is largely determined on a short-term basis and it is hampered by a lack of staff.

*“[LEPs] need to engage [unions] but also third sector organisations...and really create a consensus around what the future looks like. LEPs just **do not have the capacity** to do that....because they come together as **boards**...they typically have a fairly **small executive team** and...it’s really through the executive team that these people make things happen on a day to day basis. They’re **too busy dealing with public funding** that’s been devolved to them but still carries **heavy caveats.**”*

Consequently, there is a gap for how regional ambitions for coordination should function in Norfolk and Suffolk and a question remains over what geographical level this should occur. Some respondents favoured the weight of the former East of England

Development Agency, whilst others felt that Norfolk and Suffolk are too politically and economically different from counties like Essex and Hertfordshire for a structure with this remit to work.

*“I think you need to think about regions in a **bigger way than just 39 LEP areas**. Norfolk and Suffolk is a **relatively small economy**; if you bring Norfolk, Suffolk, Cambridge and Essex together, you’ve got something with much **more heft**, something that’s **meaningful to the UK**. At the moment, if Norfolk or Suffolk succeeds or fails, it’ll have an impact...but there’s something about **having scale**, there’s something about what the Regional Development Authorities were.”*

The rejection of a devolution deal due to opposition from five local councils shows that this must happen in a way that makes sense to the communities and political structures currently operating in the area. At its heart, this involves questions about how to balance the priorities of different communities, including which geographical areas to focus investment on.

*“The thing that knocked devolution off the rails was **the idea of a metro mayor**. That was just something that **was completely alien** to someone who was in the deepest wilds of Norfolk, really. So how do you create a structure that has a **focus on the economy of the region, a line in to central government** so central government can talk to one body about the economy? So when the Chancellor’s pulling his budget together he can pick up the phone.”*

*“Where do we want to end up? One of the really striking contrasting end points that came up in some of the long term futures discussions...were two futures, one where you have...**population focused into intensive city living**, with a relatively human-free landscape around or **people spread out living in a more perma-culture style existence with less urban living** and...less wilderness.”*

RECOMMENDATIONS

The delivery of good jobs in Norfolk and Suffolk requires both the growth and expansion of new sectors providing high-quality low-carbon jobs as well as the improvement of sectors where quality of jobs is low. The only way to succeed in this endeavour is through a place-based approach which harnesses the power and knowledge of local people, from employers to unions, universities to local government, and which takes action at a national level where this is necessary.

There are three principles we believe a successful industrial strategy will commit to:

- **Ensuring that local people and institutions are at the decision-making table and have power to shape policy and practice**
- **Delivering good jobs across the country in a way that is consistent with decarbonisation, defined as including: voice at work, fair and decent pay, regular hours, fair treatment and respect, healthy workplaces, and learning and progression.⁷⁶**
- **Ensuring that local people benefit from the value and wealth generated in their areas**

To achieve these objectives, we make recommendations under five categories:

1. Real strategic power at a regional level: a regional body to coordinate decision-making and get the right voices round the table. These must include local government, employers, unions and the third sector.

2. Better pay and productivity in the sectors that need it most such as retail, hospitality and food manufacturing.

3. Skills strategy tailored to demands of local people and firms equipping young people so they can access future opportunities.

4. Investment for the long term: in transport infrastructure (rail, road and ports to facilitate market access and energy construction/decommissioning); broadband infrastructure (to support communications and digital industries); science and innovation (to support renewables industry among others).

5. People, employers and government shaping the new economy together through strategic planning and appropriate support for workers, with a focus on the

development of low carbon industry and local assets in the region.

Real strategic power at a regional level

Our findings have shown the need for coordinated governance and decision-making at a level above that of local government but below that of national government, in order that policy properly meets the needs of the two counties. Given the withdrawal of the potential devolution deal after its rejection by five local authorities, the question of how to provide this kind of regional leadership is a challenging one. However there is definitely appetite locally to work together and some good examples of this happening organically. **We recommend the creation of a regional body capable of planning and coordination** that has the following attributes:

- Participation – from democratically elected local politicians as well as trade unions, employers and representatives from the third sector.
- Time – funding and accountability structures that allow for serious horizon scanning and planning for future trends, looking to 2030 and beyond.
- Money – financial resources to properly fulfil its functions.
- Powers – to act locally adopting social partnership approaches to coordinate infrastructure investment, skills coordination, coastal management and industrial transition.
- Accountability for its decisions.
- Improved ability to work more closely with partners outside Norfolk and Suffolk whether in neighbouring areas or at the national level

New Anglia LEP is well regarded and effective, but would need to change in order to meet all of the above criteria. LEPs are private-sector led organisations with some local government participation, about which the National Audit Office has expressed serious concerns on value for money and capacity to deliver⁷⁷. A body such as the one we are proposing would have the remit of ensuring private sector activity is aligned with public strategic objectives.

If New Anglia were to be the coordinating body it would need: amendment to its remit; a requirement to broaden its board membership to include for example unions and the workforce; greater reliability of funding; and increased accountability for its decisions. There should be a process exploring areas where funding can be pooled, decisions made

and interaction with national government can happen across the administrative geographical boundaries of Norfolk and Suffolk where appropriate. The scope of the organisation should be reviewed in a democratic way after an agreed amount of time to assess whether cross-boundary partnerships support its remit being expanded or changed. There is also a question for national government about how it can best work collaboratively with such a new institution.

Real strategic power at a regional level	
Regional / local	National
<ul style="list-style-type: none"> · Leadership from local government: county, city and district councils · Participation from employers, unions, universities and colleges, third sector · Local adoption of social partnership approaches to coordinate infrastructure investment, skills coordination, coastal management and industrial transition 	<ul style="list-style-type: none"> · Create a regional body capable of planning and coordination that has: <ul style="list-style-type: none"> · Participation from democratically elected local politicians, employers, trade unions and representatives from the third sector. · Powers – to act locally adopting social partnership approaches to coordinate infrastructure investment, skills coordination, coastal management and industrial transition · Money – financial resources to properly fulfil its functions · Accountability for its decisions · Time – funding and accountability structures that allow for serious horizon scanning and planning for future trends, looking to 2030 · Review of whether organisation should remain strictly within Norfolk and Suffolk boundaries

Better pay and productivity in the sectors that need it most

Many of the issues we identified in lower paid sectors related to the quality of work.

There is an important role for industrial strategy in addressing these issues and shaping

the future quality of work by setting ambitious goals and then implementing changes to move towards them. This will involve action from both national and regional/local policymakers. We recommend changes to labour market regulations, which until now have allowed insecure forms of employment practice to undermine wages and conditions and contribute to a low productivity business model.

A sectoral approach is very important, as reflected in the Government's 'challenge' to different sectors to make proposals for a sectoral approach to improving productivity. We recommend the development of a sectoral approach using the social partnership methods adopted widely elsewhere in Europe. Specific sectors in the region where this could be relevant include food manufacturing, retail and tourism, with an emphasis on building the capacity of local organisations that are already working in this way. Most importantly, sectoral approaches should not be restricted only to the high value high productivity growth sectors and should be adopted by regional and local actors in addition to national government.

National and local government should also use procurement and commissioning powers to promote higher pay through the adoption of the TUC's Great Jobs Agenda, and adopt the real Living Wage as a concrete first step. This generates recognition for those employers who are making a contribution to tackling low pay and also increases private sector focus on making productivity improvements to help pay for wage increases. The devolved administrations in Scotland and Wales have moved in this direction and the UK Government should do so as well.

Allowing trade unions better access to workplaces, improving the connections between union representatives across locations in multi-site companies and reforming corporate governance to include workers on boards are also measures that would contribute to the improved quality of low-paid work.

Better pay and productivity in the sectors that need it most	
Regional / local	National
· New Anglia should convene regional	· Create new sectoral institutions focused on low paid

<p>sector groups in retail, tourism and hospitality and food manufacturing that include employers and unions to address questions of pay and productivity. Engagement with the SME sector will be crucial given their prominent role in tourism hospitality and retail in the region.</p> <ul style="list-style-type: none"> • Local government at city, district and county level should adopt the TUC's Great Jobs Agenda as standard for jobs and take action to promote it • As a first step to supporting better jobs, local government should follow the example of Norwich and Ipswich Councils and play a leadership and convening role firstly by paying the real Living Wage and secondly by bringing together leading employers willing to pay and promote the real Living Wage to the people they directly and indirectly employ, and down their supply chains. • Employers should adopt the real Living Wage and play a leadership role 	<p>sectors which bring employers, unions and government together to improve productivity, training and progression.</p> <ul style="list-style-type: none"> • Reduce significantly the use of zero hours contracts • End the Swedish derogation to reduce employers' incentive to use agency workers which undermines pay and conditions of permanent employees • Introduce a right for agency workers to become permanent employees after a specified length of service • Introduce a mechanism for ensuring a premium pay rate for non-guaranteed hours, to increase the incentive for employers to give workers sufficient notice of their shifts, and compensate them appropriately otherwise • Improve the enforcement of NMW through greater investment in the enforcement team in HMRC, recognising that the coverage of the NMW has increased • Use procurement and commissioning powers to promote the real Living Wage by awarding public contracted work to employers who guarantee to pay their employees and contractors the higher rate. • Government should give unions better access to workplaces and allow trade unions to use electronic balloting to reduce waste and increase participation and workforce engagement. • There should be real worker participation in board decision-making, made possible by national corporate governance reform to put workers on boards.
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Skills strategy tailored to demands of local people and firms

Nationally, skills policy has been inconsistent for decades⁷⁸. Stability and coordination will be key to future improvement as the Government's reforms are implemented. Other countries which have successful education and technical skills systems, like Germany, Denmark, Austria and Switzerland, have achieved this through a regional approach combined with specialist technical institutions in the context of a stable policy environment.

In some other regions in the UK, the skills budget has been devolved to an elected mayor and combined authority. The lack of such a body in Norfolk and Suffolk presents a major challenge in coordinating the skills system and further strengthens the case for a regional coordinating body as a means of addressing these issues in the two counties.

Alongside education institutions, employers and local government, unions and workforce engagement are key and a social partnership approach should be adopted to ensure their participation as this is developed. Voluntary efforts by trade bodies or particular education institutions are to be welcomed and supported with funding. An intentional and coordinated approach is essential to ensure better business-education partnerships can help shape provision to meet future opportunity and needs so that young people from Norfolk and Suffolk can access opportunities in growing industries.

Skills strategy tailored to demands of local people and firms	
Regional / local	National
<ul style="list-style-type: none"> · Skills budgets should respond to specific learning in different sectors about challenges faced by connecting business and education institutions and prioritise the scaling and transferral of ideas to other sectors where appropriate · Boost participation of employees, unions and employers in regional skills institutions · Continued investment in Seafish and Eastern Seafish Training Association 	<ul style="list-style-type: none"> · Devolve skills budgets so that the skills system in Norfolk and Suffolk can respond to and meet local priorities. Coordination between national government departments including DFE is essential. · Prompt business to work with education institutions through a fund that matches employer contributions to the cost of co-developing courses in areas where there are current skills gaps

<p>ESTA to continue training for young fishermen in business planning and how to organise high value, short supply chains locally.</p> <ul style="list-style-type: none"> · Ensure better careers advice and guidance to promote understanding among students in schools and colleges about future opportunities specific to the region e.g. engineering and construction roles in offshore renewables. 	<ul style="list-style-type: none"> · Reverse cuts to Further Education budgets and align financial incentives of FE colleges with the skills needs of the regional economy · Support and financial compensation for people affected by transition through a funded system to support adult re-training. The costs of re-training could be met through the savings generated by Government as proceeds from the Apprenticeship Levy replace current apprenticeship funding. Those on low incomes should be prioritised · Ensure skills policy is joined up to other areas of industrial strategy such as plans for infrastructure investment and science and innovation research & development. · Improve the quality of apprenticeships introduced under the levy, not just the total number. · Include engagement with trade unions in the new National Institute of Apprenticeships and Institutes of Technology, to assist with setting and monitoring of quality standards
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Investment for the long term

It was clear from a range of respondents, from local government leaders to food manufacturing workers, energy industry leaders to fishers, that there is a serious need

for investment in transport infrastructure, digital connectivity and research. In particular, there is a unique combination of likely future activity around the coast which includes the decommissioning of Sizewell A, decommissioning of older oil and gas offshore platforms, further offshore wind construction and an opportunity to grow and diversify fishing activity. This represents huge opportunity for the region but will also require considerable coordination and development of new infrastructure. We recommend a holistic review of the need for structural investment in the area and the development of a plan to substantially improve transport connectivity and infrastructure.

Investment for the long-term		
	Regional / local	National
Increased investment in transport and digital infrastructure, and science and innovation	<ul style="list-style-type: none"> · LEP or new regional body should conduct a holistic review of infrastructure needed given likely future developments including energy construction and decommissioning, and develop a coordinated plan · Liaise with National Infrastructure Commission 	<ul style="list-style-type: none"> · National Infrastructure Commission to engage with and fund local plan · Replace EU funding for innovation post-Brexit: Government policy needs to be backed up by long-term innovation funding commitments. Government should ensure that, post-Brexit, the UK matches or exceeds EU funding streams that would have paid for research and innovation, including Horizon 2020 funding towards Low Carbon Technologies. · Regional growth fund for fisheries to replace the EMFF once we leave the EU focused on ports

People, employers and government shaping the new economy together

We heard clearly from respondents that there is a clear need for a much more effective system to support adults who are in transition from one industry to another. Consistent cuts to adult education budgets since 2010 have had a negative impact and the financial barriers to re-training experienced by lower income workers must be removed.

The people in industries undergoing transition are best placed to understand the current skills base in the area and the historic example of the Lucas Plan points to the opportunities for facilitating workers across skill levels, roles and sectors to feed in to a plan that is centred on the existing capacity of those already working in Norfolk and Suffolk. The UK will need to expand non-hydrocarbon sources of energy in order to meet the strategic objective of decarbonisation. To ensure that the benefits generated through the process of industrial transition is shared more equally, alternative ownership models that focus on how communities can retain wealth locally should be prioritised.

People, employers and government shaping the new economy together	
Regional / local	National
<ul style="list-style-type: none"> · Dialogue between workers and decision-makers: the adoption of a social partnership approach as is common in countries like Germany and Denmark to discuss the challenges and opportunities of transition · Planning mechanisms to identify future trends and ensure they deliver for local people · Audit of formal and informal skills present in workforces in declining industries and plans for supporting workers with those skills to use them in alternative sectors · Prioritise social impact and community economic development 	<ul style="list-style-type: none"> · Achieving a mix of public-private contributions to the cost of workforce development and re-training through incentivising employers to invest · Support and compensation for adults affected by transition is critical to ensure successful re-training · Set an ambitious national target for energy generation from offshore and marine renewables. This should at least match the TUC's call for 50% of energy to come from renewables by 2030. · Increase support for local energy supply markets, including by clarifying the requirement by local generators to supply to the national grid. Government

<p>when appraising investment and funding decisions</p> <ul style="list-style-type: none">· Norfolk & Suffolk should set a target for community or locally owned energy. The planning process should be amended accordingly to give a greater emphasis to community owned energy projects with genuine local benefit	<p>needs to enable new, local business models to be tested that ensure that the value created by locally-generated power is <u>realised and shared locally</u> in the form of lower energy prices, new jobs and skills in a local economy, improved energy security and stronger support for local renewable energy.</p> <ul style="list-style-type: none">· Establish a National Maritime Research Centre to bring together existing bodies and funding supporting the UK's maritime industries with a particular focus upon innovation in marine operations and vessels that currently fall between maritime transport and the offshore renewable sectors (from Renewables UK).· Provide certainty around ongoing subsidy to renewables, particularly emerging methods of generation such as tidal energy to encourage cost reductions and innovation.· Agree with the EU on who owns what share of the fisheries resource as a first step. Map and present trade-offs to national and regional stakeholders. Set up a transitional arrangement that ends in 2020, to cover the time between leaving the CFP and the initiation and implementation of a UK fisheries Act.· Reallocate any quota gains so that the entire UK fleet benefits, including preferential treatment for the inshore
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	<p>fleet, who currently do not have access to quota New fishing opportunities should go to those who can demonstrate they fish sustainably and generate value to their local economy.</p> <ul style="list-style-type: none">· Use Fisheries Bill to create viable, regional systems of co-management, including inshore Producer Organisations.
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ENDNOTES

- ¹ Department for Business, Energy and Industrial Strategy (2017). *Building our industrial strategy: Green paper*. London: Department for Business, Energy and Industrial Strategy. Retrieved from <https://www.gov.uk/government/consultations/building-our-industrial-strategy>
- ² Rt Hon Greg Clark MP (2017, 24th July). *Boosting earning power everywhere*. Retrieved from <https://www.gov.uk/government/speeches/boosting-earning-power-everywhere>
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