

Greater Brighton Economic Board

DRAFT COVID 19 Sustainable Recovery Plan

1.0 Introduction

The Greater Brighton region is a prosperous and attractive place to live underpinned by high value sectors. The area covers a geography from Seaford in the East, to Bognor Regis in the West and north to Crawley and Gatwick Airport. It is home to 988,000 people, 619,000 of whom are of working age and it provides 400,000 jobs across 42,000 active businesses.

However, like other parts of the UK, COVID-19 has, and will continue to, impact the region's economy significantly: GVA (output) is estimated to shrink by 11% in 2020; youth employment will be high as many young people work in the most impacted sectors such as retail and tourism; performing and creative arts sectors have been forced into hibernation; and transport and logistics has seen a mixture of challenges with belly cargo through Gatwick Airport collapsing and export-related transport and logistics companies seeing revenues decline¹.

Two thirds of businesses have made use of the Government's job retention scheme which will move to a job support scheme at the start of November, and there is concern about further unemployment, particularly within the 18-24 and 60-64 age ranges. The number of insolvencies has also risen. There were 74 insolvencies across the Coast to Capital LEP region in June, which is up from 39 in May.

The COVID-19 pandemic has also occurred in the lead up to the UK withdrawal from the EU for which there will be economic impacts on the region, as well as implications of new trade deals. Nationally and internationally, we are addressing the climate change emergency and highlighting green recovery. It will be important to take account of this within any recovery plan.

Much has already been delivered. Local authority partners have awarded over £200 million in business grants to over 15,000 eligible businesses, and over £180k in discretionary grants to support other businesses most in need at this critical time. In addition, some sectors are returning to a pre-COVID -19 position much quicker than anticipated. Manufacturing industries including building production, automotive and, construction are doing well. Domestic tourism is experiencing a brief recovery and consumers are thinking and spending locally.

2.0 Greater Brighton Impact Analysis

It is crucial to understand the short-medium term impacts of the pandemic but also consider how longer-term structural changes in the economy will impact on the City Region. The Board and its recovery plan must be agile and be able to adapt to sudden changes in government response and /or the possibility of local lockdown scenarios. It is also important to fully understand and respond to the impacts on City Region residents and workers. At a

¹ GBEB COVID 19 Impact Assessment [Hatch Associates]

national level, analysis of those that have either lost their jobs as a result of the crisis, or have been furloughed, indicate that young people, women, and older members of the workforce have been disproportionately affected - possibly because these groups are more likely to work in sectors such as retail, hospitality and tourism, which are amongst those most acutely impacted. Among those in younger age groups will be many who are leaving full time education and seeking their first job.

In May 2020, the Greater Brighton Economic Board commissioned Hatch to undertake an impact assessment to understand the challenges based on the intelligence available and the composition of the local economy. This report uses these findings to recommend a series of strategic interventions for the region to tackle the issues and optimise opportunities. This is done against the backdrop of the Board's Five-Year Strategic Priorities, which were agreed in January 2019.

2.1 Summary of findings

The impact assessment for the region highlighted six main impacts. These findings are; a rise in unemployment, closure of local businesses and significant challenges in four main sectors; Creative, Arts and Culture, Education, the Visitor Economy and Transport. The following sections of the recovery plan will look at these in more detail, and aligned to the Board's Strategic Priority Themes; International, Creative, Connected, Talented and Resilient.

However, first it is important to consider the wider regional landscape and recovery activity already identified.

3.0 Wider regional picture

Coast to Capital LEP (C2C) have just published their COVID-19 Economic Impact Assessment which recognises that GVA output across the LEP area is likely to fall by up to 17% in 2020. To recover that lost output and return to pre-COVID-19 GVA levels by 2029, regional GVA growth would need to at least double to 6% by 2026². This assessment highlights similar business, employment and sectoral impacts to the City Region, reflecting the similar geographies.

In response, C2C are developing a draft recovery plan to enable the economy of the region to build back stronger, smarter, greener. The Greater Brighton Recovery Plan supports the objectives laid out by C2C.

To build back stronger; support Crawley with a plan to grow, adapt and broaden the UK's most COVID-19 impacted town into a more diverse and dynamic place. Development of new housing, commercial space and an enhanced skills and innovation offer will match the ambition of Global Britain and of a model for sustainable living.

To build back smarter; build upon the knowledge and innovation community which already exists in Brighton and has been developing in other areas such as Worthing. Expedite investments in knowledge for all, building on areas of competitive advantage, including support for the development of an internationally significant hub for Quantum Technologies,

² Coast to Capital – Coronavirus (COVID 19) Economic Impact Assessment Aug 2020, Hatch

alongside the ongoing evolution of our mature sectors, with continuing advances in digital and clean growth sectors.

To build back greener; draw on our talented workforce and local business specialisms, to lead a green recovery across the whole region. Work toward UK ‘net-zero’ targets on climate change by 2050 with a twin-track approach, decarbonising the energy supply across homes, transport and industry while securing and coordinating investment in natural capital to offset emissions, through new development.³

4.0 Greater Brighton Economic Board Vision and Priorities

The Greater Brighton Economic Board will continue to make the strongest possible case for Government investment into the City Region. The Board will also look to influence the development of the Government’s policy to ensure that Government adopts mechanisms for boosting economic recovery that will benefit the Greater Brighton economy.

The Board approved its Five Year Strategic Priorities in January 2019, with the vision for the region to have a growing, modern economy that is international, creative, connected, talented and resilient.

Across all these themes, the we aim to create an innovate and entrepreneurial ecosystem that reflects the needs of the City Region’s complex economy. We aim to address the skills agenda, using the ambition-driven ecosystem concept to facilitate connections between universities and businesses to address skills shortages together with realising innovation potential.

4.1 INTERNATIONAL

The Board has agreed that an international profile will not only increase the region’s chances of securing foreign direct investment, but a growing international reputation will also enhance the City Region’s standing at a national, regional and local level. Never is that more important than now as businesses in the region close and certain sectors struggle. It is now important for the region to capitalise on the anticipated movement of businesses out of London and pitch for the region as a smarter, greener, cheaper alternative equidistant from Gatwick. The Board and its partners must also work with the City-Region’s global companies, their networks and supply chains to rebuild the economy.

For both universities in the City Region, international students are an important source of income (20%). The COVID-19 crisis has meant a reduction in international students taking up places in UK HE institutions for the 2020/21 academic year. Private language schools and those that target international students have been hit, with GVA related spending also reduced. This could also be compounded by a decline in university take up by domestic students who choose to defer their first year, a situation made more challenging as a result of the A-Level and BTEC grade awards confusion in August.

Building an international reputation is crucial for the region’s universities. More positively, there is scope to better leverage the global R&D links of both universities to expand access to markets for local businesses and play an important role in ensuring they still attract and

³ C2C – Build back stronger, smarter and greener

retained skilled talent in the region. The region also has significant potential in a strong emerging position in Quantum computing, with a new university-based company recently launched to build the first large-scale quantum computer using microwave technology rather than lasers. This is backed by household name investors with the ambition for Brighton and Hove to become a Quantum city. Brighton and Hove and the University of Sussex and Greater Brighton partners should champion the ground-breaking technologies developed in labs on campus to utilise existing technical expertise to create a new industry sector in Quantum, and complementary ecosystems of high-tech companies surrounded by a relevant supply chain, enabling a skilled workforce and creating jobs.

Furthermore, with the UK withdrawal from the European Union, many BREXIT challenges remain unknown at this point in time. The Board has a part to play in minimising risk for the economy, maximising opportunities and working together to lobby government for international trade deals that support the region's businesses.

ACTIONS

- Inward investment in the region is low. Greater Brighton's Inward Investment Desk currently being developed by the GBEB Business Support Team should continue to develop at pace, utilising the recently agreed place narrative for the region and an improved website and supporting businesses to relocate to the region. Funding should be identified to support this crucial work.
- The Board should also support R&D innovation led recovery and growth, through the global R&D networks of the universities and global companies across Greater Brighton, increasing the number of businesses benefiting from national schemes such as Knowledge Transfer Partnerships including by:
 - Highlighting recovery-relevant academic expertise at the University Brighton, notably in Clean Growth and Innovation Management
 - Highlighting skills growth programmes within the Universities.
- The Board must support establishing positioning Brighton as a 'quantum city' supported by leading edge technological skills training at the heart of any such a plan. The ambition is to make Brighton an incubator for knowledge-economy based entrepreneurial activity, as well as a hub to create a highly skilled, creative workforce which can generate young scale-up businesses.

4.2 CREATIVE

4.2.1 Business Support

Brighton and Hove is in the top 20 towns and cities in the UK for insolvencies since the start of the lockdown. There were 74 insolvencies across the Coast to Capital LEP region in June, which is up from 39 in May. Results from the latest British Chamber of Commerce Coronavirus Business Tracker reveal that business conditions improved only moderately in the weeks since the UK economy suffered an historic contraction in Q2 2020, with firms still reporting high levels of reliance on government support schemes to help stem cashflow issues. More than 1 in 3 of businesses say they have three months or less worth of cash in reserve.

ACTIONS

- The Board will ensure that Businesses will continue to be supported to grow by the Business Hot House programme being run by the University of Chichester and C2C's Growth Hub, in addition to innovation, growth and recovery programmes being run by the University of Sussex and the University of Brighton.
- As demand for flexible workspaces continues to rise, the region should build on the successful workspaces within the region such as Platf9rm, Plus X and the Sussex Innovation Centre (Brighton & Hove) and the Track (Bognor) and promote these more widely. Further public sector investment may become available to support this and the Board should bid for this to expand the offer in the region.
- The Board officers will act as a centralised point to help identify gaps in our Business Support activity (e.g. self-employed and sole traders) and bring together key actors to ensure there is effective sign posting between the different programmes. The Board will actively seek to invest and sponsor such initiatives.

4.2.2 Creative Industries and the Visitor Economy

The UK's creative industries have been an international powerhouse and, prior to the coronavirus pandemic were the fastest growing sector of our economy. In Greater Brighton creative industries generate over £1.5 billion annual GVA for the local economy⁴. Much of the creative, cultural and visitor economy ground to an immediate halt as the lockdown took effect. The situation was exacerbated with the lockdown starting at the end of March, meaning businesses were closed during traditional key peak demand times such as the Easter weekend and the two May Bank Holidays. The sector has gradually reopened from the 4 July, but the continued ban on large gatherings and resulting cancellation of all festivals, sporting events and other large events through the summer has hit the region hard, and the ripple effect on the many small businesses that supply these events has been acutely felt. The parts of the sector that depend on attracting audiences or visitors will be the last to resume operations and they may not be able to operate 'as normal' for years.

Many creative small and medium enterprises (SMEs) and freelancers have had their work dry up and seen their projects disappear almost immediately. Although the furlough scheme has provided a lifeline for many, much of the initial support package put forward by the Government was inaccessible to the sector. The majority of culture and leisure organisations are relatively small, have narrow profit margins (where they generate any form of profit at all) and do not have significant reserves to rely upon. Some elements of the sector, including theatres and leisure centres have expensive venues which have substantial fixed costs associated with them irrespective of whether they are open to the public. For the most part these organisations are very reliant on income generation to support their business model and are often equally reliant on a volunteer workforce. On 17 June, the Creative Industries

⁴ Josh Siepel University of Sussex research on Creative Industries in Greater Brighton

Federation cited research claiming that over 400,000 creative jobs could be lost this year, with the UK creative industries projected to lose £1.4 billion a week in revenue in 2020.

The Government's announcement of £1.57 billion rescue package for cultural organisations was welcomed on 5 June. However, some parts of the sector (leisure in particular) have yet to benefit from a specific package of support and still face many of the same problems they did in May.

Many staff in the hotel, food and accommodation and arts entertainment and recreation industries have been furloughed and may not be retained. As social distancing measures remain, capacity and volume of visitors is impacted especially where venues and locations cannot utilise outdoor space and the weather changes.

On the positive side, lockdown has prompted a huge interest in culture and creativity, including e-books, digital exhibitions and streamed theatre shows to crafts activities and community singing. The crisis has demonstrated how important culture can be in supporting mental wellbeing. Furthermore, work patterns that will become the 'new normal' are nothing new to creative enterprises and freelancers. They are used to working digitally and remotely, and have a wealth of experience in remote collaboration that will be useful to other sectors who are having to adapt.

The creative industries have been the fastest growing part of the UK economy in recent years. With appropriate support, they have the potential to lead the way in the 'bounce back' from COVID-19⁵. Through the DRIVA programme, the University of Brighton has developed a range of short-courses to support creative industries to respond to these challenges with 364 regional/local companies participating in recent events.

ACTIONS

- The Board welcomed the £1.57 billion Government support package for cultural organisations and will lobby Government for other support packages for cultural and heritage organisations currently deemed ineligible.
- The Board will work with partners such as Visit England, Experience West Sussex and Visit Brighton to support the visitor sector promote the region for staycation breaks and holidays.
- The Board should work with local trade bodies and Visit Brighton and Experience West Sussex to lobby national government for a Tourism Sector Deal for the region
- The Board will seek out new opportunities for business growth projects in tourism and creative industries to transform the pace of growth in these sectors, attracting new investment and moving into new markets to build back stronger.

⁵ LGA Creative Places – Supporting your local creative economy

4.3 CONNECTED

4.3.1 Digital

Digital has become the most critical part of the UK's infrastructure during the COVID-19 crisis. The expansion of home working and the shift towards e-commerce have accelerated the move towards digital. Digital companies can capitalise on these opportunities. Greater Brighton is home to a prosperous digital, media and tech sector, with one of the few 5G testbeds outside of a university. It's one of the most successful in the UK, with a turnover significantly exceeding £1 billion annually⁶ The region is also home to a significant cluster of online gaming companies. Most of these companies grew online presence, products and revenues during lockdown and are continuing to do so. Some have found it difficult to recruit staff with the right skills and computational power to programme. Data visualisation companies have also experienced the same restraints as demand for their services has grown, particularly in the Health sector.

The region also has a strong emerging position in Quantum Computing with the ambition for Brighton and Hove to become a Quantum city. Brighton and Hove and the University of Sussex and partners need to utilise existing technical expertise to create a new industry sector in Quantum, an ecosystem of high-tech companies surrounded by a relevant supply chain, enabling a skilled workforce and creating jobs.

However, digital exclusion exists within the region and whilst the offer of online training is good, not all unemployed can access this training.

ACTIONS

- The Board supports the West Sussex Gigabit programme and will push for a speedy roll out of ultrafast digital infrastructure in a collaborative way, particularly within the region's rural communities to avoid digital exclusion
- The Board should develop a report on digital inclusion provision at each local authority, specifying funding levels, providers, numbers reached and future plans
- The Board should continue with the development of the Greater Brighton Digital Action Plan and stimulate the adoption of digital technologies and skills among non-digital businesses and residents, including the potential to focus on specific sectors or settings.
- The Board and its partners should work with the business sector to support local training providers to provide digital skills training required for vacant positions.
- The Board should support C2C's plan for two urban innovation districts within Brighton and Hove to provide much needed lab and commercial space, to facilitate collaboration, innovation and commercialization.
- The Board should support establishing Brighton as a 'quantum city' with quantum skills training at the heart of any such a plan to make Brighton an incubator for future entrepreneurial activity as well as a hub to create a skilled workforce.

⁶ Wired Sussex 2020

4.3.2 Transport

Gatwick airport accounts for an economic footprint of 85,000 jobs, many based within the City Region and £5.3 billion towards GDP (2016 Oxford Economics). Aviation is one of the sectors most affected by COVID-19, with an unprecedented impact on Gatwick Airport and its associated workforce, businesses, supply chain and passengers. The reduction of international long-haul flights at Gatwick Airport, the temporary pausing of take-off and landing slots for BA and Virgin Atlantic and the knock-on effect to supply chains and the wider aviation sector means the impact is significant. The area's economy is particularly exposed with a lack of resilience in the wider economy, particularly within Crawley and Mid Sussex, when the airport is adversely affected by international events impacting on air travel. Economic recovery is likely to take time and considerable support⁷. Gatwick Airport Limited has developed its own 'ask of Government' including a sector specific extension to the Coronavirus Job Retention Scheme until April 2021 to protect the workforce; and for an approach to quarantine for inbound travellers based on county-by-country risk.

Lockdown has seen an increase in active travel modes such as walking and cycling and a decrease in public transport use. The Government is keen to see infrastructure in place to support sustainable travel modes and reduce congestion. Many local authorities in the region are increasing the number of cycle lanes and improving the public realm to facilitate walking whilst maintaining social distancing.

ACTIONS

- The Board should support Gatwick Airport's ask of Government in regard to the job Retention Scheme.
- The Board will support the local authority partner delivery of the Emergency Active Travel Fund schemes across the region such as the Bike Share scheme and improved cycling and walking infrastructure.
- The Board will support public transport providers to encourage users back onto the networks in a safe and socially distanced way
- The Board will lobby Network Rail to continue with the improvement plans to the Brighton Mainline.
- The Board will continue to lobby for improvements to the main transport corridors; A27, A259, A23 and A29.

⁷ WSCC Draft Economy Reset Plan

4.4 TALENTED

There were 25,870 claimants aged 16+ in West Sussex for June, over 2.5 times the number in March, though there has been some reduction in the last month. Crawley has seen the highest increase in the number of claimants from March – June 2020 (3,220) and Mid Sussex the highest percentage increase over March-June.

Young people (16-34 years) account for the majority of those claiming benefits and this is reflective of the UK as a whole. However, it is also believed that there is some under-reporting of job losses in this age range due to a reluctance to claim Job Seekers Allowance and/or Universal Credit if still living at home with parents.

In addition, many of those finding themselves out of work or facing significant job insecurity are experienced, high skilled individuals across a wide age profile.

The education, skills and employment landscape are being severely impacted, including opportunities for school leavers, apprenticeship provision, the impact on further and higher education settings, and graduate employment.

Crawley has the highest employment vulnerability of any town or city in the UK; 80% of the town's jobs have been identified as being impacted or vulnerable.

ACTIONS

- The Board will support the new 'Plan for Jobs announced by the Government in July including investment in apprenticeships, traineeships, the National Careers Service, and a new 'Kickstart Scheme' to fund the direct creation of high-quality jobs for young people at the highest risk of long-term unemployment. The Board will promote the scheme to employers and signpost to local providers'
- With a rise in unemployment, particularly in the 18-24 age range, and some sectors struggling to need the same number of employees as pre-COVID, the Board should promote schemes to support those who wish to retain and gain new skills for sectors that are growing such as Digital and Sustainability and Clean Growth.
- The Board and its partners should work closely with the region's colleges and employers to provide face to face and on-line professional development short courses, training and upskilling for unemployed so they can be matched to vacancies.
- The Board should support C2C's efforts with partners in the public and private sector to create a world-class innovation centre within Crawley, in the heart of Manor Royal, so Crawley can diversify to support other industries in addition to aviation.
- The Board supports WSCC, ESCC and Brighton and Hove to work together with the Sussex Learning Network to develop a collaborative 'pan Sussex' approach to ensuring education and training at all key stages is available locally; that learners of all ages are aware of them, including mature learners and employers; and progression pathways are highly visible.
- The Board should actively support the development of skills and employment opportunities that reflect a modern, low carbon economy. These include the huge opportunity around a large-scale retrofit programme, in which Greater Brighton could become a national exemplar.

- The Board should support the Coast to Capital LEP and the Energy Catapult with their bid to establish a Decarbonisation Skills Academy in the Greater Brighton City Region, with the support of BHCC, Crawley BC, Greater Brighton Metropolitan College, Chichester Colleges, and the University of Brighton. The Decarbonisation Skills Academy will aim to provide the skills training programmes required to deliver the skilled labour for large scale housing retrofit programmes.

4.5 RESILIENCE

Individuals, businesses and other institutions need to be agile and react decisively and positively to external forces, such as economic shocks or Government policy announcements. Resilience needs to be built in a proactive way, and technology will have an important role to play in embedding new solutions. For the Greater Brighton economy to continue to recover from the COVID-19 pandemic and grow into the future, there is a need to build resilience and security into our blue, brown and green infrastructure. There is also a need to build resilience in our communities and residents.

ACTIONS

- The Hatch report identified the Greater Brighton region as a focus for sustainable growth. In fact, both the recently completed Greater Brighton Energy and Water plans are testament to this and provide a number of projects to help the region become more resilient. There is an opportunity to use the region's strengths in green technology and innovation to support this type of recovery. This also offers potential for reskilling within a green economy. With the government and LEP focus on building back greener there is an opportunity to support the retrofitting of existing housing and public sector stock identified within the Greater Brighton Energy Plan. Government incentives for this include the Green Homes Grant and the Public Sector Decarbonisation Grants. The Board (and composite local authorities) should bid for this funding.
- The Board should support the University of Brighton's leading role in the national Clean Growth UK Programme that has 1343 local business as members undertaking green growth activity within the region.
- The Board should create a Greater Brighton hydrogen hub to accelerate private sector production of green hydrogen drawing on the expertise of the University of Brighton's Advanced Engineering Centre and Clean Growth UK business network, as part of a wider focus on sustainable transport which reflects academic/industry partnerships in Advanced Engineering notably University of Brighton & Ricardo.
- The Board should support partners to deliver retrofit programmes for homes and buildings at a regional scale, working with leading private and community sector providers across the Greater Brighton area.
- Taking into account the Planning White Paper, the Board must support all new housing with green energy and support working from home (space and connectivity). Proximity to community social space must also be considered.

- The Board should deliver the region's digital and energy infrastructure pipeline of projects, aligning skills provision with industry specialisms to create new jobs and deliver a clean recovery.
- The Board must support the Crawley Recovery Taskforce and Recovery Board led by the Borough Council, including the Government's Towns Fund activities linked to the Crawley Growth Deal.
- The Board must support C2C's efforts with partners in the public and private sector to create a world-class innovation centre within Crawley, in the heart of Manor Royal, so Crawley can evolve to support other industries in addition to aviation.
- The Board must continue to develop the region's project pipeline, potentially leverage Local Growth Funding/Shared Prosperity Funding and highlight the potential of channelling future Government funding to the wider region and further profile and stimulate the local economy and attract growth companies.
- The Board will support positioning Brighton as a 'quantum city' with quantum skills supported by leading edge technological skills training at the heart of any such a plan to make Brighton an incubator for future knowledge economy entrepreneurial activity as well as a hub to create a highly skilled, creative workforce.

5.0 Communications

The COVID-19 pandemic and the need for recovery means Greater Brighton can no longer operate on a business as usual footing in terms of communications activity. There is great instability and government uncertainty. It is likely that there will be large-scale unemployment and many previously thriving sectors will continue to struggle. In addition, looking forward, Brexit and the Devolution White Paper will also impact on residents and businesses, as well as the identity of the region moving forward.

Whilst work will continue on site visits and case studies, social media channels including the website, press releases and publications in trade press, utilising GBEB 'experts', the Greater Brighton communications function is advocating a shift in emphasis for the coming year with 12 months of work focussed on four broad themes.

- Economic Recovery (including green recovery)
- Resources for our growing economy
- Infrastructure for our growing economy
- Skills for our growing economy.

The GB Comms team are developing an enhanced communications plan for 2020/21, in conjunction with the Chair, which will be presented to the Greater Brighton Economic Board in October.

6.0 Conclusion

The Greater Brighton region has been impacted significantly by the COVID-19 pandemic, notably in the creative, arts, visitor economy, transport and education sectors. The Greater Brighton Economic Board must continue to lobby government for support in these hard-hit sectors. The Board should consider the opportunities provided by new Government programmes and new funding streams; recognise national calls for a 'greener, fairer and more resilient' recovery and use this to frame recovery actions making reference to Government narrative on 'levelling-up'.

Building back a more resilient economy, environment and society is a key focus of this recovery strategy. The region has strong emerging positions in the digital and green sector. There is great potential to maximise the knowledge economy technologies and promote the accompanying skills that could have a transformative impact on the city region's offer and fortunes. Brighton and Hove and the Universities of Sussex and Brighton will build on the early example set by the quantum computing spin out to create a wider eco-system in quantum technologies and other high-tech companies surrounded by a relevant supply chain, attracting and growing a highly skilled workforce.

Parts of the region are home to digital and tech clusters and have seen demand and productivity grow but need a support for an increased digital workforce. Increased connectivity is key. Digital infrastructure in rural parts of Greater Brighton are set to be boosted after Mid Sussex District Council and the Coast to Capital Local Enterprise Partnership secured £3.2 million from the Government. The new additional funding secured for the Digital Sussex Rural Connectivity Programme will accelerate the delivery of gigabit capable connections in the surrounding towns and villages.

The Board's energy and water plans demonstrate that the region is seizing the initiative to initiate, support and coordinate projects which will both help the environment and lead a sustainable economic recovery. The Board should focus on supporting delivery of the energy and water projects including retrofitting homes to improve energy efficiency, using solar power to supply energy to public buildings and the rail network and achieving water use neutrality in the region despite the influx of 97,000 more people by 2030. Supporting the skills capacity in these fields will be crucial.

It is important to consider recovery against the backdrop of Brexit. There will be opportunities and challenges to the economy presented by the UK's withdrawal from the EU. There may be job creation/availability at a time when unemployment has risen but matching skills to vacancies may be difficult.

Most important will be that the Board and its partners work collaboratively on the recommendations outlined in this plan. This will increase the potential added value and leverage the Board could gain by working with neighbouring organisations in achieving these objectives through partnership working.