

Coastal West Sussex Economic Plan (2016-2020)

Prepared for:
Coastal West Sussex Partnership Board





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Foreword



The political, organisational and economic landscape has changed since the last Coastal West Sussex Economic Strategy was produced and our new economic priorities now reflect this.

- At national level, reductions in public spending will continue between 2016-2020 as the Government pursues its aim of eliminating the budget deficit and rebalancing the economy.
- At regional level, the Coast to Capital LEP's Strategic Economic Plan has targets to create 60,000 new jobs, build 26,000 new homes and provide 970,000 sq.m of commercial across the region. Its Growth Deal has secured £202m local economic development initiatives.
- At sub regional level, the Greater Brighton Economic Board and the Three Southern Counties Partnership have agreed devolution priorities to negotiate with central Government.

We face external uncertainties that we cannot control, including the European Union referendum and persistent weaknesses in the global economy. We will have to manage these uncertainties in the best way we can and focus our energies on where we can make a practical and tangible difference to our local economy.

Many of our challenges have not changed significantly. We still need to:

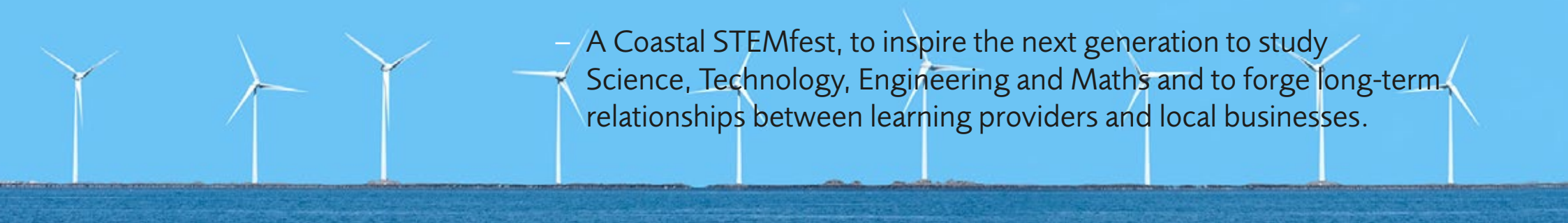
- Create a stronger and more diverse economy and spread the benefits of economic growth more evenly;
- Make best use of our land to provide good quality housing and employment floorspace;
- Equip our residents with the skills that they need to prosper in the future;
- Improve our transport and digital infrastructure; and
- Build more homes that are affordable and which meet the changing needs of the local population.

Over the past three years we have:

- Identified the key employment and housing sites across Coastal West Sussex, the appropriate infrastructure improvements needed to deliver growth, and we have formed the right governance structure to further identify and manage spatial planning issues that impact on the wider geography;




- Produced a Local Strategic Statement (LSS) that sets out the long term strategic objectives and short term priorities for delivering growth across the Coastal West Sussex and Greater Brighton area. This won an RTPi award in 2014 for Innovative Planning Practice in Plan Making;
- Provided input into the Coast to Capital LEP's Strategic Economic Plan which formed the basis of £40m investment in CWS over 5 years, including £7.28m in 2015-16;
- Led a bid to secure pump priming investment to deliver a project that will grow the value of tourism across Coastal West Sussex; and
- Worked in partnership with others to deliver
 - A project to grow the local supply chain and contribute to the Rampion Wind Farm development;
 - A careers information portal, Pathway – Steps to Success for use by local schools; and
 - A Coastal STEMfest, to inspire the next generation to study Science, Technology, Engineering and Maths and to forge long-term relationships between learning providers and local businesses.



The mechanisms for achieving local growth are now different. We need to be more creative and work even more closely together to improve our economy. As a business-led partnership, we are committed to bringing our combined talents and knowledge to the table. We are confident that we can help deliver strong growth in Coastal West Sussex over the next five years.

The role of the Coastal West Sussex Partnership Board is to influence, co-ordinate, lobby, broker, communicate, promote, engage and lead in ways that may sometimes be more difficult for local authorities and their partners.

We will be a strong voice for Coastal West Sussex, adding value where we can and focusing on specific interventions and actions that will make a tangible difference to the Coastal West Sussex economy.

A handwritten signature in black ink, appearing to read 'Kirk M. Brown', followed by a long horizontal flourish.

Kirk Brown

Chair

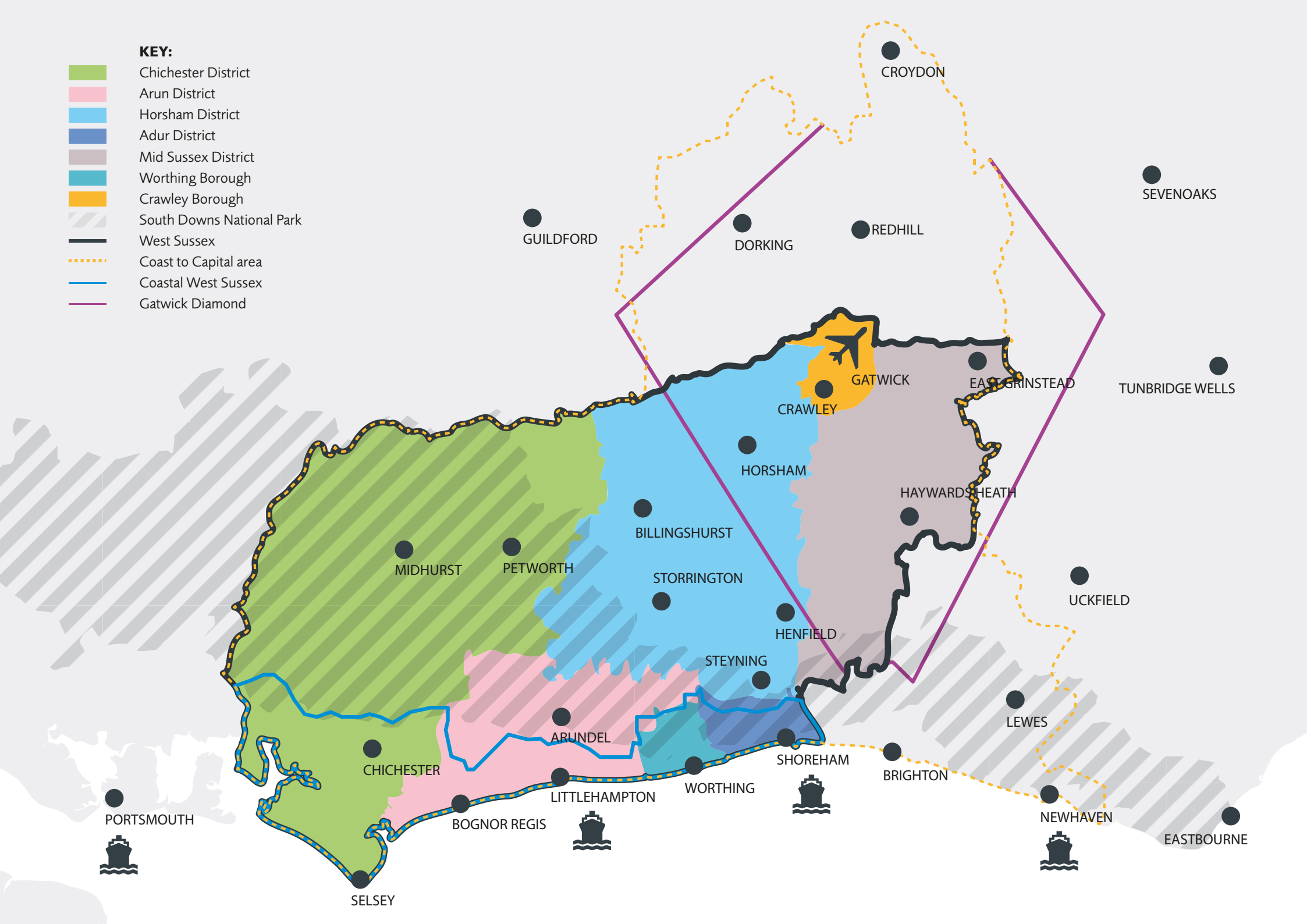
Coastal West Sussex Partnership

Executive Summary



KEY:

- Chichester District
- Arun District
- Horsham District
- Adur District
- Mid Sussex District
- Worthing Borough
- Crawley Borough
- South Downs National Park
- West Sussex
- Coast to Capital area
- Coastal West Sussex
- Gatwick Diamond



OUR VISION

Our economic plan sets out our ambitions for the Coastal West Sussex economy and identifies actions that the Coastal West Sussex Partnership will take to support the vision already agreed for the broader area, which is for Coastal West Sussex and Greater Brighton to be a sub-region:

- Where businesses will want to locate and grow, with a thriving economy supporting a wide range of employment opportunities, high quality, commercially viable sites and a high level of skill and education attainment;
- Which offers a choice of housing to meet the changing needs of the population, with access to a decent home for everyone;
- Which is easy to travel around, with excellent transport links both around Greater Brighton & Coastal West Sussex and to major destinations in the wider South East;
- Where high quality digital communication plays a key role in supporting the way we live and do business;

- Where residents, businesses and visitors continue to benefit from Greater Brighton & Coastal West Sussex's high quality natural environment; and
- Where each town continues to play a different role with its distinctive character, opportunities and 'sense of place'¹.

Our vision, priorities and actions also support the ambitions of the Three Southern Counties Partnership to deliver smart and sustainable economic growth.

¹. This Vision is in the *Greater Brighton & Coastal West Sussex Local Strategic Statement – Delivering Sustainable Growth 2013-2013*



OUR PRIORITY THEMES AND GUIDING PRINCIPLES

The Coastal West Sussex Partnership is a business-led partnership that will use its individual and collective talents and knowledge to take actions where it can to make a difference to the local economy. Its actions will be driven by eleven guiding principles under four priority themes:

Priority Theme 1: Building Business Confidence

- Businesses leaders must be confident to invest, expand and grow their operations within Coastal West Sussex and help to identify and support new entrepreneurs from within the area.
- Business leaders must champion investment decisions across Coastal West Sussex, including those to and from London and other accessible economic centres, where there is clear evidence that decisions will impact positively on economic growth, job creation, employment space and housing.
- There must be a coordinated and positive approach to marketing Coastal West Sussex to encourage large and small businesses to invest in the area, whilst celebrating its cultural and creative offer.

Priority Theme 2: Improving Connectivity and Investing in Infrastructure

- All key business zones across Coastal West Sussex must have access to ultrafast broadband connectivity to support innovation, creativity and business location decisions.
- There must be a healthy supply of first class business accommodation, which is essential to meet the needs of new inward investors and businesses wishing to expand in Coastal West Sussex.
- The foundations for economic growth must build on the unique assets of Coastal West Sussex and its component parts whilst complementing those of neighbouring areas.
- Support investment into key infrastructure that improves connectivity across CWS to Brighton, Portsmouth and north to Gatwick and London

Priority Theme 3: Providing Homes

- Business leaders must champion the need to provide additional homes across Coastal West Sussex, but not at the expense of losing prime business space.
- All new housing developments should include an appropriate element of homes that, considering the Coastal West Sussex average salaries, will be affordable for the local workforce.



Priority Theme 4: Improving Workforce Skills

- Business leaders must work collaboratively and build connections with schools, Further Education and Higher Education institutions to develop relevant education and skills programmes, and employment pathways for young people and adults alike.
- All private and public businesses should commit to providing careers and employment advice, apprenticeship, internship and skills development opportunities for people across Coastal West Sussex.

OUR RATIONALE FOR ACTION

- **Devolution and Local Authority Finance:**

Responsibility for local economic development is being devolved to Local Enterprise Partnerships, sub-national partnerships, (such as the Three Counties Partnership and the Greater Brighton Economic Board), local authorities and other partners through Local Growth Deals and City Deals. Replacing the central government grant to local authorities with a system of incentives, places the onus on public and private sector partners to work better together to support economic growth that will help deliver the public services that are needed. Local economic development priorities will be set out in the West Sussex Growth Plan and in our local authorities' Place Plans.

- **Improving Productivity:** Despite relatively high levels of employment, Coastal West Sussex lags behind many parts of the south east of England in economic performance. In many parts, it remains over-reliant on traditional sectors that are not expected to generate significant employment in the future, and low value added consumption dependent sectors that often provide low-paying jobs.

- **Improving Skills:** Qualification levels amongst our workforce are low by regional standards and many of our businesses are concerned about the work-readiness and core skills of our young people. If we are to develop a high value added economy that builds on our advanced engineering, digital and creative skills, we need to improve our area's skills base, particularly in terms of STEM and enterprise education. Changes in the way that vocational education is funded and delivered, provide private sector businesses with an opportunity to be more actively involved in education and training activities.

- **New Development Opportunities:** There are opportunities to spread the benefits of economic growth more evenly across Coastal West Sussex by developing strategic sites, particularly in Adur and Arun. These could generate significant numbers of high value added job opportunities. However, many sites need public investment and support to overcome constraints to make them commercially viable.

- **Improving Transport Infrastructure:** Much of our road and rail network is slow and unreliable, making Coastal West Sussex uncompetitive. Improving the A27 and other trunk roads at key points is a major local priority, as is improving the speed and reliability of east-west coastal rail links. Over capacity and congestion mean that all new developments will need to be well-served by public and private transport links and they should encourage more sustainable forms of transport.

- **Building More Homes:** Low levels of housing completions have contributed to high house prices. This has put home ownership out of the reach of many young people, in particular. This threatens our economic future as our businesses could find it increasingly difficult to compete with other parts of the country for talent. We also need to ensure that the mix of housing reflects the changing demands of different elements of the population.

- **Improving Digital Connectivity:** Access to ultrafast broadband and 5G mobile connectivity are increasingly required by ambitious businesses. There are still parts of Coastal West Sussex, where broadband and mobile access are poor. This is particularly the case in our rural areas, but we must also race to keep up with business expectations in our commercial centres. We also need to ensure that our businesses have the skills to utilise digital technology effectively to support their business growth plans.

HOW THE PLAN WILL BE MONITORED AND IMPLEMENTED

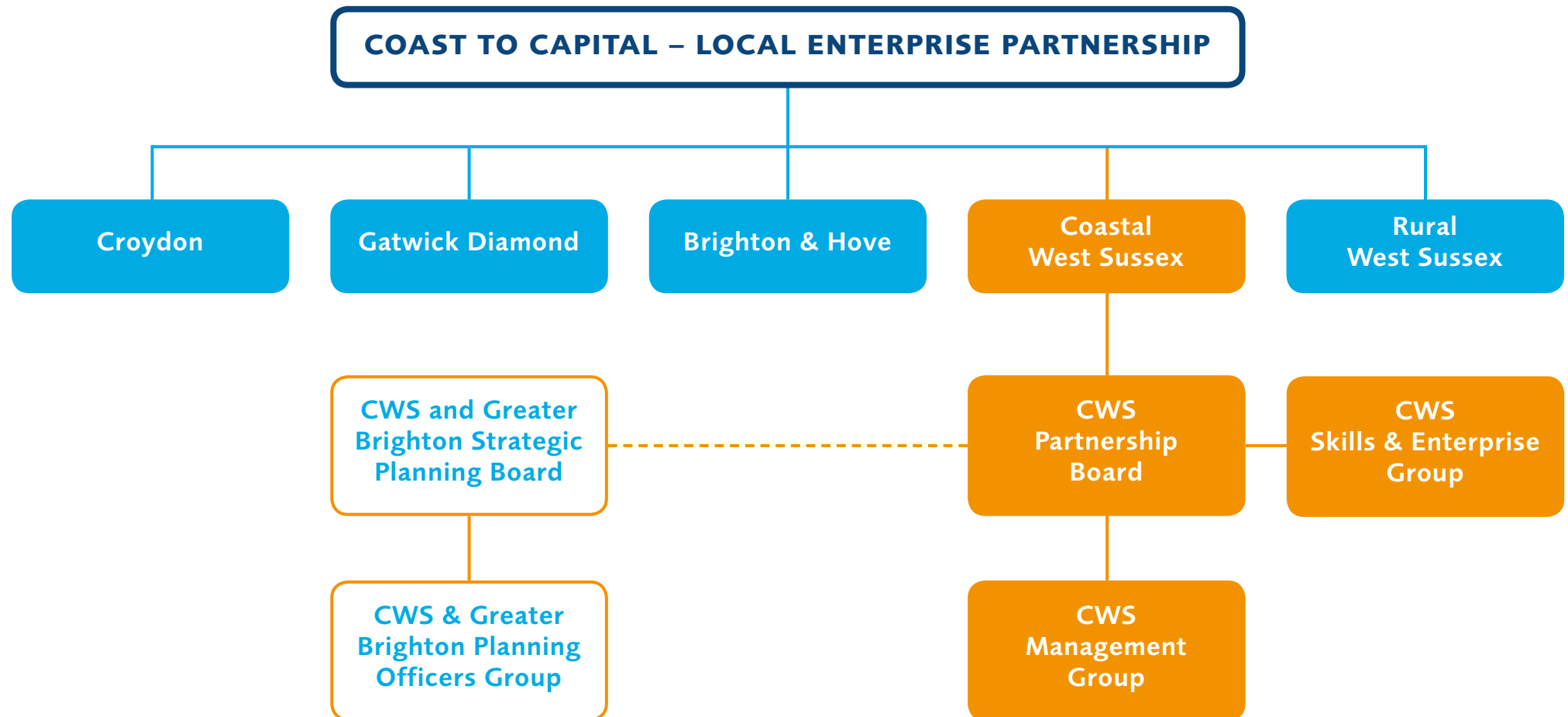
The Coastal West Sussex Board will have overall responsibility for ensuring that the actions within this plan are implemented. The Board will be supported by a Management Group and a Skills and Enterprise Group. Much of the delivery will be co-ordinated by the Coastal West Sussex Partnership's professional staff, led by the Partnership Director, who will report quarterly on progress to the Board, the Management Group and the Skills and Enterprise Group.

Much of our role as a business-led partnership is to provide the business voice, to support and challenge public service commissioners and providers where necessary and to lobby, influence and persuade on issues that are of the greatest importance to Coastal West Sussex businesses.

We will be collaborative, make the best use of our talents, focus on issues where we can make a difference, and be flexible enough to respond to fresh circumstances and issues as they emerge.



LOCAL ECONOMIC DEVELOPMENT STRUCTURES



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Coastal West Sussex A Profile



1.1 DEMOGRAPHICS

- A quarter of our residents are aged 65+ and this is projected to increase to 33% by 2034.
- There could be a further 46,000 residents by 2034, but the number of working age residents is projected to fall.
- Most population growth is projected to be in the west of the sub-region (Arun and Chichester).
- The demographic projections could have a major impact on the structure of the economy, the type of services that will be demanded and its overall attractiveness to younger age groups.

Coastal West Sussex is sandwiched between Brighton & Hove and Portsmouth, both major commercial centres. Much of it is also easily accessible to Gatwick Airport and London. The South Downs National Park and its varied coastline make it a popular visitor destination for families, in particular.

Worthing, Bognor Regis, Littlehampton, Shoreham by Sea, Chichester and Selsey are its main urban centres, each with its own identity. It is also widely known for its rich soil and sunlight, making it one of the UK’s leading plant and food producers.

In 2014, Coastal West Sussex had a resident population of just under 438,000, six out of ten (61%) of whom lived in Arun or Chichester Districts. A quarter (25%) of its resident population is aged 65+ years, and this rises to 28% in Arun District.

The number of people living in Coastal West Sussex has increased by nearly 51,000 over the past twenty years, with more than four out of ten (41%) of this increase being accounted for by population growth in Arun District.

Figure 1.1 Demographic Change in Coastal West Sussex 1994-2034²

	1994		2014		2034	
	Count	Percent	Count	Percent	Count	Percent
0-18	79,700	21	87,400	20	92,600	19
19-64	209,700	54	238,800	55	231,400	48
65+	97,600	25	111,700	26	160,400	33
ALL	387,100	100	438,000	100	484,400	100

Source: ONS Mid Year Population Estimates 1994-2014 & WSCC population projections 2014-34 in Adur, Arun, Chichester and Worthing Strategic and Investment Planning Population and Demographics (March 2015)

2. Numbers rounded to the nearest 100

The figure shows the change in the Coastal West Sussex resident population between 1994 and 2014 and the projected change between 2014 and 2034.

Most of the increase (58%) has been amongst working age people (aged 19-64 years). This pattern has been most marked in Worthing, where this age group accounted for 85% of all population growth and where there was a decline in the post-working age population. The trend in Chichester is markedly different. Here, post-working age residents accounted for nearly half (47%) of all the District's population growth and pre-working age residents (0-18 years) accounted for just 10% of the population growth.

Projections suggest that Coastal West Sussex could have a further 46,000 residents by 2034. Nearly eight out of ten (79%) of this increase is projected to be in the two western districts (Arun and Chichester). These projections also suggest that population growth over the next twenty years could be almost exclusively amongst post-working age residents. Indeed, the number of residents aged 65+ is projected to increase by 48,700, whilst the number of working age residents is projected to fall by 7,400.

If this were to happen, it would mean that one third (33%) of all local residents were aged 65+ and that working age people (19-64 years) accounted for fewer than half (48%) the local residents. This could have a significant impact on the structure of the labour market and on attempts to reposition the area as a place that is attractive to young, working age residents.

1.2 THE ECONOMY

- There are 7,000 more people employed in Coastal West Sussex than there were in 2009: 13,000 more in the private sector and 6,000 fewer in the public sector.
- More than eight out of ten (84%) of the additional jobs are part-time and there has been virtually no increase in full-time employment over the past five years.
- The labour market is tight, particularly in the west of Coastal West Sussex. Combined with the falling number of working age residents, this could make recruitment difficult for local businesses.
- The rate of growth in new businesses is low compared with England as a whole. However, many of the new businesses are in high value added sectors of the economy.
- The visitor economy is important to Coastal West Sussex, but there has been little growth in visitor numbers or in real terms visitor expenditure over the past five years. Many of its tourist facilities are no longer of the quality that higher spending visitors expect.
- Low skill levels and a lack of aspiration and work readiness amongst young people are widely considered to inhibit Coastal West Sussex from broadening and strengthening its economic base.

Employment

Figure 1.2, on page 18, shows that the private sector has led employment growth in Coastal West Sussex since the 2008/09 recession. In 2014, there were over 13,000 more people working in the private sector than there had been in 2009 and 6,000 fewer people working in the public sector.

The private sector now accounts for 82.6% of all local employee jobs, compared with 77.8% in 2009.

Nearly half of all the additional jobs that have been created are in Chichester (45%), but the overall increase in employee employment (+4.7%) is marginally below the increase across England as a whole (+5.4%).

Figure 1.3, on page 18, shows that the vast majority (84%) of the additional 7,000 jobs are part-time, which means that the overall amount of employed work (full-time equivalent jobs) is considerably lower (+4,200).

There has been virtually no increase in full-time employment in Chichester over the past five years and the number of full-time employees in Adur actually fell. This pattern contrasts sharply with trends across England as a whole, where part-time work has accounted for less than a quarter (23%) of all employment growth since 2009.

Figure 1.2: Public and Private Sector Employment Change in Coastal West Sussex 2009-2014³

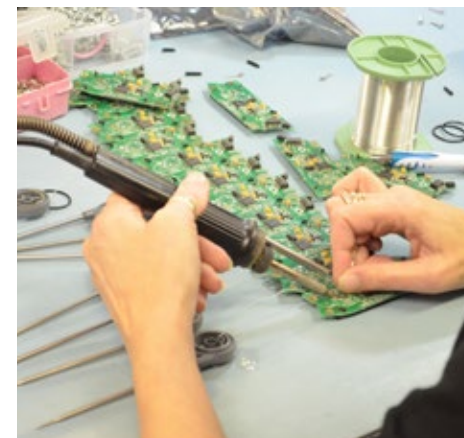
Area	2009-2014 Change					
	All		Public		Private	
	Count	Percent	Count	Percent	Count	Percent
Coastal West Sussex	+7,300	4.7	-6,100	-17.7	+13,300	+11.1
Adur	-500	-2.9	-900	-25.6	+300	+2.2
Arun	+2,100	+5.5	-1,000	-15.4	+3,100	+9.5
Chichester	+3,300	+6.2	-4,100	-30.5	+7,400	+18.5
Worthing	+2,400	+5.5	-100	-1.1	+2,500	+7.8
England	+1,235,200	+5.4	-510,700	-10.8	+1,745,900	+9.5

Source: Business Register and Employment Survey 2009 & 2014 ONS via NOMISWEB

Figure 1.3: Changes in Full-time, Part-Time and Full-Time Equivalent Employment 2009-2014⁴

Area	2009-2014 Change					
	Full-time		Part-time		Full-Time Equivalent	
	Count	Percent	Count	Percent	Count	Percent
Coastal West Sussex	+1,200	+1.2	+6,100	+11.5	+4,200	+3.3
Adur	-600	-5.0	+100	+1.4	-600	-3.7
Arun	+500	+2.1	+1,600	+11.8	+1,300	+4.1
Chichester	+100	+0.3	+3,200	+17.8	+1,700	+3.8
Worthing	+1,100	+4.1	+1,300	+8.0	+1,800	+4.9
England	+948,000	+6.0	+287,200	+3.9	+1,091,600	+5.6

Source: Business Register and Employment Survey 2009 & 2014, ONS via NOMISWEB



3. Note: Numbers have been rounded to the nearest 100

4. Notes: a) Numbers have been rounded to the nearest 100;
b) Full-Time Equivalent has been calculated based on 1.0 x full time job + 0.5 x part-time job.

Average earnings, too, are below those in England, both for residents and for workers and there is little evidence of relative improvement over the past five years.

Employment levels are higher locally than nationally. The Coastal West Sussex employment rate is 78.1%, compared with 73.3% in England. However, there are significant differences between the east and west of the sub-region. The employment rates of 72.5% in Adur and 73.3% in Worthing suggest that the labour market in the east of the sub-region may be less tight than in its west, where the employment rates are 80.7% in Arun and 82.5% in Chichester.

Given the current tightness of much of the Coastal West Sussex labour market and the projected decline in its working age population, it may not always be easy for employers to fill large numbers of new vacancies from the existing labour force. However, the right opportunities may encourage out-commuters to take up jobs in Coastal West Sussex that are closer to home.

Businesses

There are just over 17,000 businesses in Coastal West Sussex; over 1,600 more than there were in 2010. Arun and Chichester combined account for two-thirds (66%) of all the businesses in the Coastal West Sussex sub region.

Figure 1.4, below, shows the change in business counts in Coastal West Sussex and its constituent local authorities between 2010 and 2015. The overall increase of (+10%) is lower than the rate of increase across England as a whole (+17%).

Figure 1.4: Change in Business Stocks 2010-2015

	2010	2015	2010-2015 Change	
	Count	Count	Count	Percent
Coastal West Sussex	15,510	17,115	+1,605	+10.3
Adur	1,925	2,185	+260	+13.5
Arun	4,615	5,025	+410	+8.9
Chichester	5,840	6,355	+515	+8.8
Worthing	3,125	3,550	+425	+13.6
England	1,797,910	2,116,295	318,385	+17.7

Source: Count of UK Businesses (Enterprises) 2010 & 2015, ONS via NOMISWEB



However, business density (67.2 businesses per 1,000 working age residents) is well above the England average (61.5), largely due to the very high number of businesses in Chichester (96.3 per 1,000 working age residents).

There have been increases in the number of businesses across many sectors, but the most significant growth has been in the following sectors:

- Management consultancy (+210)
- Specialist construction (+175)
- Professional, scientific & technical (+145)
- Office administration and other business support (+145)
- Architectural and engineering (+120)
- Food and Beverage (+115)
- Computer programming and consultancy (+100)
- Services to building and landscape (+100).

Many businesses in these sectors are likely to be engaged in high value activities, but could often be micro (or even home-based) businesses that employ only a very small number of people. Nevertheless, their growing presence may provide opportunities to generate the type of high level job opportunities that could improve productivity within Coastal West Sussex.

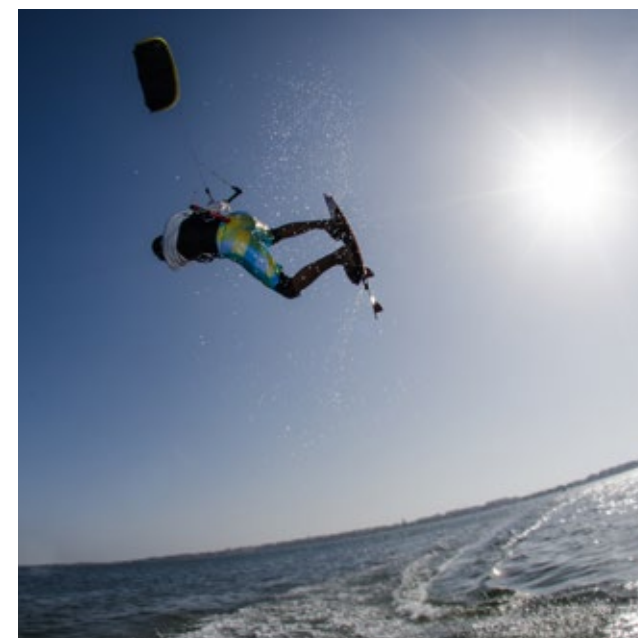
Coastal West Sussex already has several high profile businesses in the horticultural and engineering sectors. Rolls Royce's new site in Bognor Regis is an endorsement of the attractiveness of Coastal West Sussex for leading edge businesses; whilst businesses

such as Ricardo in Shoreham, B&W Speakers in Worthing and MG Duff in Chichester are world leaders in their fields. Other major local employers include GlaxoSmithKline, the Environment Agency, Southern Water and the Inland Revenue, whilst Shoreham Port is one of the UK's most successful cargo ports.

Tourism

Tourism is a vital part of the Coastal West Sussex economy, but according to a recent study into the Coastal West Sussex visitor economy⁵ there has not been a significant increase in visitor numbers or visitor expenditure over the past five years. Chichester is the prime focus of the visitor economy not least because of its high profile events and strong cultural heritage.

The whole area is considered to be a safe and suitable destination for families, in particular, and it has good quality beaches and excellent local produce. However, the study suggested the area's visitor economy underperforms and that many of the services and facilities are not of the quality that visitors expect. It recommended setting a target to grow the value of the visitor economy by at least 5% in real terms by 2018 through greater private sector involvement, better co-ordination of services, improved destination marketing and investment in upgrading the visitor offer to attract more staying visitors, particularly from higher socio-economic groups.



5. Underground Sussex: Growing the Value of Tourism in Coastal West Sussex, Venues Advisor et al, 2015

2

Setting the Context



2.1 DEVOLVING DECISION-MAKING

The National Picture

- City Deals and Growth Deals are aimed at devolving greater responsibility for economic development to regional and sub-regional levels.
- An incentive-based approach to local government funding is replacing the central government grant system. This requires a fresh, more collaborative and entrepreneurial approach to delivering local services, with a stronger role for public-private sector initiatives, in particular.
- New devolution deals are currently being negotiated, which could further strengthen local decision-making across a number of service areas.

The Sub National Picture

- The Coast to Capital Strategic Economic Plan has targets to create 60,000 new jobs, build 26,000 new homes and develop 970,000 sq.m of employment floorspace by 2020/21.
- Coast to Capital has secured £204m of Growth Deal funding to support locally agreed economic development priorities by 2021 and both the Greater Brighton Economic Board and the Three Southern Counties Partnership are currently negotiating new devolution deals with central Government.

What this means for Coastal West Sussex

- The West Sussex Growth Plan will set out West Sussex County Council's infrastructure and investment priorities and will be informed by Place Plans for each of its local authorities.
- Coastal West Sussex businesses are well-placed to influence the economic landscape and to help local authority and other public sector partners to agree priorities and implement local actions to deliver economic growth.

The National Picture

Many of the principles that were introduced by the 2010-2015 Government have remained in tact since the election of a new Conservative Government in 2015. From a local economic development perspective, the devolution agenda is chief amongst these. City Deals and Growth Deals have been agreed to enable local areas to:

- Take responsibility for decisions that affect their area;
- Do what they think is best to help local businesses grow;
- Create economic growth; and
- Decide how public money should be spent.

Local Enterprise Partnerships are now firmly established as the vehicles through which the Growth Deals are channeled and they have all developed their own Strategic Economic Plans and European Structural and Investment Fund strategies. These set out the regional economic priorities that will determine how public funding will be used to support local economic growth.

New incentives for local authorities to promote growth aim to offset the phasing out of the central government grant, resulting in fresh approaches to partnership working between them and with other private and public sector partners. In the 2015 Spending Review and Autumn Statement, the Government set out plans for local authorities to retain 100% of their business rate revenue to fund

local services and, with the support of local business representatives on Local Enterprise Partnerships, to implement local business rate policies to stimulate growth and fund infrastructure investment⁶.

The New Homes Bonus provides local authorities with additional income from housing completions over a six-year period; the Government's One Public Estate programme aims to help local authorities design more efficient asset management strategies that support economic growth; and both the Community Infrastructure Levy (CiL) and Tax Increment Finance (TIF) provide further ways for local authorities to raise revenue to support economic development activity.

New Devolution Deals are being negotiated with City Regions and other local partnerships, and the £12bn that has been allocated to the Local Growth Fund will be channeled through Local Enterprise Partnerships as part of the agreed Growth Deals.

⁶ Spending Review and Autumn Statement, HM Treasury, November 2015

The Sub National Picture

The Coastal West Sussex Partnership is one of five sub-regional partnerships working with Coast to Capital, the Local Enterprise Partnership. It is also part of the Greater Brighton City Region Economic Board (which also includes partners in Brighton & Hove, Lewes and Mid Sussex); and Coastal West Sussex is part of area covered by the Three Southern Counties Partnership (which comprises East Sussex, West Sussex and Surrey).

The Coast to Capital Strategic Economic Plan and Growth Deal

The Coast to Capital LEP's Strategic Economic Plan (SEP) provides the strategic framework for economic development within the region. It forms the basis of the Local Growth Deal that has been negotiated with central Government and sets the priorities for allocating European Structural and Investment Funds for the period 2014-2020.

The SEP's six-year programme includes targets to create 60,000 new jobs, build 26,000 new homes and deliver 970,000 sq.m of new commercial floorspace. It has six strategic priorities:

1. Successful Growth Locations, including transport investment – this includes the Coastal Corridor (stretching from Shoreham to Chichester); Enterprise Bognor Regis Enterprise Zone; and Shoreham Harbour and Airport;

2. Successful Businesses – this focuses on supporting business investment and enterprise;

3. Building Competitive Advantage – this involves backing investment and development in key economic sectors, including creative digital and IT, advanced engineering (including marine and automotive), environmental technologies (low carbon and renewables), business and financial services, healthcare and life sciences, food production, and tourism;

4. Skills and Workforce – this means making best use of talent in the region, focusing particularly on STEM skills, improving management and leadership and supporting young people to make a better transition to the labour market;

5. Growth is Digital – this means ensuring that the digital infrastructure in the region is fit to drive growth, including developing ultrafast broadband clusters and improving mobile coverage; and

6. Housing and infrastructure – this involves investing in strategic infrastructure to unlock growth and creating sustainable communities, including increasing housing completions and investing in flood defences to enable developments on specific sites within the region.

The Growth Deal brings together local, national and private funding to improve business support and skills; accelerate research and innovation; and invest in transport, flood defences and resilience. It includes

a £202m of central Government Local Growth Funds, which is expected to lever at least £240m of additional investment from local partners by 2021 for the Coast to Capital region. This excludes match funding for European Social Fund skills activities.

Greater Brighton Devolution Prospectus – Platforms for Productivity

Adur and Worthing are part of the Greater Brighton City Region. Its Devolution Prospectus builds on the economic development priorities set out in the Greater Brighton City Deal, which sought to develop a network for growth centres, throughout the city region.

The Prospectus' three 'platforms for productivity' are:

- Driving Economic Productivity;
- Releasing Social Productivity; and
- Driving Public Service Productivity.

It sets out ambitions to create an integrated transport system for the City Region; unlock growth sites for housing and employment; promote enterprise through growth centres, including at Shoreham and Worthing; and improve digital infrastructure. Social productivity will be released by providing seamless education and skills pathways; delivering Living Wage Housing; and creating a Greater Brighton Local Government Digital Service. Public Service productivity will be delivered by developing stronger regional leadership, improving

collaboration and joint working, and repositioning the public sector so that is better able to harness equitable economic productivity.

The document includes ambitious asks of Government, including devolving funding from the Apprenticeship Levy and business support budgets, enabling stamp duty to be locally retained, accelerating improvements to the A27, establishing a joint property board to make best use of public assets, and developing a local area curriculum within schools that reflects the needs of the local economy. The Greater Brighton Economic Board, which will oversee the approved actions within the Devolution Prospectus, aims to move from a joint committee governance structure towards a Greater Brighton Combined Authority, with concordats with neighbouring county councils.

The Three Southern Counties Devolution Prospectus

The 3SC Partnership comprises County and District and Borough Councils, twelve Clinical Commissioning Groups, three Local Enterprise Partnerships, two police forces, one Combined Fire Authority and the South Downs National Park.

The Three Southern Counties' (3SC) Devolution Prospectus sets out ambitions to deliver strong and sustainable growth, enhance productivity and transform public services. It includes proposals to develop a modern transport system, to increase housing delivery and land supply, improve skills and

digital connectivity and find new ways to deliver an integrated local health and social care system. It emphasises the close links that the three counties have with London and the need to provide the infrastructure to manage the significant levels of in-migration from the capital residents to the three counties, which have increased housing costs and transport congestion and added to the pressure on local public services. It proposes devolving all funding for skills and employment programmes.

What this Means for Coastal West Sussex

Adur, Arun, Chichester and Worthing District/Borough Councils have all produced Place Plans. The West Sussex Growth Plan will set out the infrastructure and investment priorities for West Sussex. This will be informed by local Place Plans for each of its local authorities, including Adur, Arun, Chichester and Worthing.

The West Sussex Growth Plan has four main components relating to Start of Life, Later Life, Economic Drivers and Infrastructure. Its overall aims include raising GVA per head, deliver housing growth and infrastructure improvements, increasing the volume of higher value jobs and helping young people to get the best possible start in life.

The Place Plans focus on how to develop the sites that will deliver the employment and housing that is needed to secure sustainable economic growth within each district/borough.

Coastal West Sussex businesses, through the Partnership, are well-placed to influence the economic landscape and to help local authority and other public sector partners to agree priorities and implement local actions to deliver economic growth.



2.2 BUILDING BUSINESS CONFIDENCE

The National Picture

- National forecasts suggest a return to sustainable economic growth over the next five years, although significant risks remain.
- Across the UK, there are more people in work than there had been prior to the 2008/09 recession and there is a clear rebalancing in favour of the private sector.
- House prices rises are expected to continue outstrip increases in average earnings, making home ownership unaffordable for large numbers of people.

The Sub National Picture

- The Coast to Capital region is one of the UK's most affluent regions. It has low levels of worklessness, high business density and a small number of niche high growth business sectors. Gatwick Airport is central to its economic development, providing a focus for international trade, whilst its close proximity to London provides huge market opportunities for the region's businesses.
- However, much of the region is poorly served by its transport infrastructure, high house prices reduce its attractiveness to young people and in many parts of the region unfavourable demographics and low productivity inhibit economic growth.

What this means for Coastal West Sussex

- Although employment is buoyant locally, productivity (GVA per head) is low, particularly in Adur and Arun. There is an over-reliance on traditional and low value added economic sectors and part-time work.
- Local economic and employment growth has been concentrated in Chichester and neighbouring Brighton & Hove and there is a need to find ways of spreading the benefits of economic growth more evenly across the sub-region.

The National Picture

The recovery from the 2008/09 recession has been slow, but there is evidence that the UK economy is now on a path towards longer term economic growth. Significant risks remain, including the slowdown of the world's emerging economies and on-going challenges within the Eurozone. However, the Office for Budget Responsibility forecasts average annual GDP growth of around 2.4% between 2016 and 2020; and the Bank of England suggests that consumer confidence and investment intentions are now both strong and that real income growth is gathering pace, all of which provide a strong basis for growth in domestic demand.

Employment in the UK remained more buoyant than might have been expected, given the scale of the 2008/09 recession and the number of people in work has continued to rise steadily since. There are now around 31 million people in work – approximately 1.7 million more than there had been at the end for 2007. The private sector now accounts for 83.2% of all employment, compared with 80.4% at the end of 2009 and the number of job vacancies in the economy has returned to pre-recession levels. However, nearly a third (30%) of all new employment since the end of 2009 is accounted for by people working on a self-employed basis and there has been a disproportionate increase in part-time work, which now accounts for 27% of all employment in the UK.

High house prices remain a challenge in many parts of the country. They are expected to increase at around

5 per cent year in the foreseeable future, making affordability even more of a challenge, given that this is expected to exceed wage inflation.

The main economic challenges identified by the Government are highlighted in *Fixing the Foundations – Creating a More Prosperous Nation (2015)*. This sets out how it aims to address the productivity gap that the UK has with many of its main competitors by encouraging long-term investment in economic capital, including infrastructure, skills and knowledge, and by promoting a dynamic economy that encourages innovation and helps resources flow to their most productive use.

Figure 2.1 Economic Output and GVA per Head (2014)

	Economic Output	GVA per 16-64 resident
Adur	£0.7bn	£18,800
Arun	£1.7bn	£19,400
Chichester	£2.4bn	£34,700
Worthing	£1.8bn	£27,900
CWS	£6.7bn	£26,500

Source: Experian/Nathaniel Lichfield & Partners Analysis⁷

7. Greater Brighton and Coastal West Sussex Background Papers – Background Paper 1 (Economy) Nathaniel Lichfield & Partners 2015

The Sub National Picture

The Coast to Capital region is amongst the most affluent regions in England. Unemployment is relatively low, and both economic activity rates and business start-up rates are high. In 2010 it contributed £38.9bn to the UK economy. International trade and good access to London are central to the success of its economy. Gatwick Airport at its heart and is a strong focus for the developing international trade across the region. In addition to its connectivity, the region's strengths include the presence of three universities, and numerous global companies; a small number of niche high value sectors and an outstanding natural



environment. However, in many parts of the region, productivity levels are low, much of the transport infrastructure is weak and high housing costs can make it difficult to attract and retain talented people. The Coast to Capital LEP has identified priority sectors, where it believes it has a competitive advantage. These are: Creative digital and IT; health and life sciences; advanced manufacturing/engineering; financial and business services; and environmental technologies.

What this Means for Coastal West Sussex

By national standards, the Coastal West Sussex economy is reasonably strong. However, it remains a weaker component of the south-east and the Coast to Capital regional economies. Economic activity and employment rates are high (82.2% and 78.6%) are both high and unemployment is relatively low (4.5%). However, some parts of the sub-region are over-reliant on traditional economic sectors that are not expected to be the main source of new jobs and sectors that tend to provide low value employment. The table below shows the economic output of the Districts/Boroughs within Coastal West Sussex and the differences in productivity.

The figure below shows the economic output and GVA per head estimates in Coastal West Sussex in 2014.

Figure 2.2: Distribution of Jobs in Coastal West Sussex (2014)

	Share of Jobs	Share of 16-64 year olds	Job Density
Adur	11.3	14.6	0.61
Arun	24.9	33.7	0.58
Chichester	36.4	25.9	1.11
Worthing	27.4	25.7	0.84
CWS	100.0	100.0	0.79

Source: Experian/Nathaniel Lichfield & Partners⁹

The Coastal West Sussex economy is worth £6.7bn and it has an average output of £26,500 per working age population. Chichester accounts for more than a third (36%) of the value of the Coastal West Sussex economy and is most productive by some margin. By contrast, productivity in both Adur and Arun is much lower at £18,000 and £19,400 respectively.

In 2014, there were 198,600 workforce jobs and 252,500 working age (16-64 years) residents in Coastal West Sussex. The table below shows the share of workforce jobs and working age residents in each of the Districts/Boroughs within the sub-region, together with the job density⁸.

Employment is not equally distributed within Coastal West Sussex. There is a high concentration of jobs in Chichester and a low concentration of jobs in both Adur and Arun, reflecting the differences in productivity and economic value highlighted in Figure 2.1.

A study by Nathaniel Lichfield & Partners in 2015 on behalf of the Greater Brighton Economic Board identified that much of Coastal West Sussex is heavily influenced by the fortunes of neighbouring Brighton & Hove, which has seen significant growth in both employment and economic performance over the past decade. Large numbers of working residents in Adur, in particular, commute into neighbouring Brighton & Hove to work. In the west of Coastal West Sussex, Chichester provides jobs for many of Arun's residents. Current forecasts suggest that nearly half the new jobs that will be created in the sub-region by 2031 will be in Brighton & Hove and Chichester, potentially exacerbating economic imbalances and adding to pressures on employment land supply, housing provision and transport infrastructure.

8. Job Density is the number of jobs divided by the number of working age (16-64 year old) residents

9. Greater Brighton and Coastal West Sussex Background Papers – Background Paper 1 (Economy) Nathaniel Lichfield & Partners 2015

Economic diversification has been identified as a major challenge for most of Coastal West Sussex by Nathaniel Lichfield & Partners. A great deal of its economy is characterised by traditional industries that are not expected to provide significant sources of new jobs and by "consumption-related" services, which, although likely to remain plentiful, often provide low value, low paying employment.

Historically, the stock of office space in Coastal West Sussex has been limited, but there may be opportunities for this to change. Many of the strategic sites are located outside of the area's main employment centres (Brighton & Hove and Chichester), so there is an opportunity to use these effectively to spread the benefits of economic growth more evenly across the Coastal West Sussex sub-region.



2.3 IMPROVING PLANNING AND UNLOCKING SITES FOR COMMERCIAL DEVELOPMENT

The National Picture

- The Government has prioritised improvements in the planning process and making best use of publicly owned assets as key priorities. The One Public Estate programme aims to encourage public sector bodies together to develop a joined up approach to managing their land and property and to release surplus assets for commercial development.

The Sub National Picture

- The Coast to Capital LEP has targets to develop 970,000 sq.m of employment floorspace by 2021. This will be delivered by focusing primarily on several strategic sites, many of which require public investment to make developing them commercially viable.

- The Greater Brighton and Coastal West Sussex Strategic Planning Board has been established to improve the planning process locally.

What this means for Coastal West Sussex

- The refreshed Local Strategic Statement 2015 – 31 and the four local Place Plans have identified the following major sites as priorities for commercial development:

Adur

New Monks Farm; Shoreham Airport and Shoreham Harbour

Arun

Enterprise Bognor Regis, Bognor Regis Seafront and Town Centre, University of Chichester, Angmering

Chichester

West of Chichester, Tangmere, Shopwyke, Northgate, Bus Station

Worthing

Decoy Farm, Union Place, Teville Gate, Grafton Centre, Montague Street, Stagecoach Bus Depot, Martletts Way, West Durrington

- Several of these sites have physical constraints and viability issues, including flood defences and access improvements. These will need public investment to make them commercially viable for developers.



The National Picture

The National Planning Policy Framework (NPPF)¹⁰ sets out the Government's vision for delivering sustainable development and its requirements for the planning system. At its heart is a "presumption in favour of sustainable development". There is an emphasis on empowering local people to "shape their own surroundings" and an expectation that planning should be a "creative exercise" in finding ways to improve local areas in ways that are environmentally efficient, support social progress and contribute to economic growth.

In 'Fixing the Foundations', the government commits to providing funding for infrastructure and assembly to unlock brownfield sites for development and to speed up the planning decision-making process, which it sees as a major barrier to development. It will implement a "new commercially-driven approach" to land and property management across the central government estate, with the aim of releasing public land for productive use.

In December 2015 the third phase of the One Public Estate (OPE) programme was launched. It will see partnerships of local authorities looking to deliver

10. National Planning Policy Framework, Department for Communities and Local Government, 2012

major service transformation, large-scale economic growth and efficiencies across local authority boundaries, City Regions and devolved areas. It will also see single authorities looking to deliver the major economic schemes that will transform their areas with new homes and jobs.

The Sub National Picture

The Coast to Capital LEP has targets to deliver 970,000 sq.m of new employment floorspace across the region by 2021. The main focus of this will be on strategic growth locations at Burgess Hill, Croydon, Manor Royal (Crawley) and north of Horsham, the East Surrey M25 corridor, Brighton & Hove, the Coastal Corridor from Shoreham to Chichester, Enterprise Bognor Regis, Newhaven Enterprise Zone, and Shoreham Airport and Shoreham Harbour. Many of these have infrastructure constraints that will require public intervention to make them commercially viable.

The Coastal West Sussex and Greater Brighton Strategic Planning Board has been established to identify and manage spatial planning issues that impact on more than one planning area and ensure there is a clear and defined route through the local planning process which will facilitate the development of strategic housing and commercial sites.

What this Means for Coastal West Sussex

Adur

- Adur's economic development priorities are based around unlocking key strategic sites at Shoreham Airport, Shoreham Harbour and New Monks Farm. These sites could deliver 41,000 sq.m of new commercial floorspace. However, flood defence measures need to be funded and implemented, transport improvements need to be delivered, particularly a new junction on the A27 to unlock New Monks Farm and Shoreham Airport; and businesses on Shoreham Harbour need to be relocated to suitable alternative sites, such as Decoy Farm in Worthing.

Arun

- Arun's Place Plan identifies sites that could deliver 135,000 sq.m of commercial floorspace, providing over 5,300 jobs. The emerging priorities in the District are to deliver Enterprise Bognor Regis, Bognor town centre and seafront, expansion at the University of Chichester, Littlehampton town centre and seafront, and Angmering. There are ambitions to create a creative/digital hub in Bognor Regis, a digital/engineering park at the University of Chichester and to develop the District's visitor economy. Most of the commercial floorspace development is centred on Enterprise Bognor Regis.

Chichester

- The Chichester Place Plan identifies sites that are expected to deliver 27,000 sq.m of commercial floorspace and 3,000 new jobs by 2017. Key employment growth locations are West of Chichester, which has a B1 employment floorspace allocation; Tangmere, which has a B1 and B2 allocation; and Shopwyke has four hectares of employment land. Chichester city centre is also a strong focus, including implementing measures to strengthen the evening economy, attract visitors and cater for the student population.

Worthing

- Most of the development sites in Worthing focus on transforming its town centre into a high quality commercial and visitor destination. Specific sites include Teville Gate and the entrance to Worthing railway station; Union Place, as a focus for leisure facilities; the Grafton Centre, which will open up the town centre to the seafront; Martlets Way and the site of the Stagecoach Depot. Between them, these sites could provide over 8,000 sq.m of employment floorspace, over 17,000 sq.m of new retail space; and 19,000 sq.m of new leisure space.
- In addition, there are plans for significant public realm investment. On the outskirts of the town, Decoy Farm could be developed to provide suitable alternative accommodation for the Stagecoach Depot and businesses on Shoreham Harbour.

2.4 PROVIDING HOMES

The National Picture

- Annual housing completions to 2033 need to be nearly double the completions for 2013 and 2014 to meet current and forecast demand.
- A low volume of house building and high demand has made housing unaffordable for increasing numbers of younger people.
- The Government has produced a five point plan for house building that focuses strongly on building affordable homes, releasing publicly owned land for housing development, and making it easier for SME house builders to build new homes.

The Sub National Picture

- An undersupply of housing has made home ownership unaffordable to many people in much of the Coast to Capital region. This diminishes the attractiveness of the region to young people, in particular, exacerbating recruitment challenges for employers. The Coast to Capital LEP has set out a series of housing challenges to address by improving the supply of land for housing and making better use of existing and vacant stock.
- Both the Greater Brighton Economic Board and the Three Southern Counties Partnership have proposed establishing Housing Delivery Boards, bringing together all the main agencies to improve the supply of local housing.

What this means for Coastal West Sussex

- In-migration from London and Brighton has increased the demand for homes in Coastal West Sussex. Projections of 17,500 new homes by 2025 represents an increase in completion rates of nearly 50%.
- A high proportion of the homes (37%) are expected to be built in Arun. However, across Coastal West Sussex, there is a strong reliance on major developments to deliver the housing that is required. Many of these have significant development constraints. Without public funding it may be difficult to achieve the housing targets.
- Local studies have emphasised the importance of providing the right mix of homes that are well served by communications infrastructure and which are close to where people work.

- The Place Plans have identified the following major sites for house building:

Adur

New Monks Farm and Shoreham Harbour

Arun

Toddington (Angmering), and a range of other options are being considered

Chichester

Shopwyke, West of Chichester, Westhamptnett and Tangmere

Worthing

Worthing Town Centre and West Durrington

- Many of these sites have significant infrastructure constraints, including access and flood defences, which make them commercially unviable without public investment.



The National Picture

The link between housing and economic development has become increasingly stark and improving the rate of housing completions has become a national priority. The number of new homes has not kept pace with demand in many parts of the country, contributing to high house prices that has meant that home ownership is now out of reach for many people.

England needs more than 200,000 new homes to be built each year until 2033. This is well in excess of completions in 2014 (113,000) and 2013 (108,000). The Government has set out a five point plan for housing, aimed primarily at improving access to home ownership for first time buyers. It has targets to deliver 400,000 affordable housing starts by 2020-21, including 200,000 Starter Homes, 135,000 through the Help to Buy Scheme including and reforming the planning system to free up land for homes.

It aims to release more public sector land for housing, providing capacity for a further 160,000 new homes, making it easier to release undeveloped commercial, retail and industrial land for housing; improve support for SME house builders; develop new garden cities; and use revenue from increases in Stamp Duty on second homes to fund affordable housing.

The Sub National Picture

There is a long-standing under-supply of housing in the Coast to Capital region, which has contributed to high house prices and which reduces the attractiveness of much of the region to young people, in particular. However, it is not just the insufficient supply that is the problem, the mix of housing does not always reflect demand. The Coast to Capital LEP's Strategic Economic Plan sets out a series of housing challenges for the region, including bringing vacant stock back into use, making better use of current stock, challenging views on housing density, and ensuring that there is an adequate supply of new development sites.

The Greater Brighton Devolution Prospectus sets out plans to develop a Greater Brighton Housing and Property Investment Plan; establish a Greater Brighton Property Board, comprising all relevant Government departments and agencies to deliver a One Estate approach to managing property and land assets; and establish a Greater Brighton Housing Company to accelerate housing delivery in the city region. It intends to use Stamp Duty retention and the revenue from the New Homes Bonus to support these activities.

The Three Southern Counties Devolution Prospectus sets out aims to identify public sector sites that can be used for affordable housing, agree shared priorities with the Homes and Communities Agency (HCA) and establish a Housing Delivery Board with Government departments and agencies.



What this Means for Coastal West Sussex

There is evidence of significant in-migration to Coastal West Sussex from Brighton & Hove and directly from London. The lack of family housing and high property prices in Brighton & Hove have resulted in young families looking to move to where the housing stock better reflects their needs and where house prices are more affordable.

Coastal West Sussex is well positioned to attract these people, who might otherwise look to relocate to other areas outside the Greater Brighton & Coastal West Sussex sub-region. Current projections suggest that just over 17,500 new homes will be built in Coastal West Sussex by 2025 with over a third (37%) being built in Arun District. However, in order to achieve this, the rate of house-building will have to increase by 48% compared with the previous decade, with the most significant uplift (+118%) being in Adur District¹¹.

Much of the planned house building is predicated on successfully developing major strategic sites, such as Shoreham Harbour and New Monks Farm in Adur, West of Chichester and Tangmere in Chichester, Angmering in Arun and West Durrington in Worthing. However, there are often infrastructure constraints, particularly relating to highways improvements, and flood defences that prevent these sites from being developed. In many cases, these will require public sector investment.

11. Greater Brighton & Coastal West Sussex Background Paper 2 – Housing Market, May 2015

Adur

- The Adur Place Plan sets out targets to build 3,600 new homes by 2031, including 600 at New Monks Farm, 970 at Shoreham Harbour and 480 at West Sompting. However, there are infrastructure constraints in each of these that need to be addressed in order to develop these sites. Both development at New Monks Farm and Shoreham Harbour require improved A27 access to achieve suitable access and connectivity and the development at Shoreham Airport can only proceed following completion of the Shoreham Adur Tidal Walls Scheme.
- The Shoreham Harbour development requires flood defence measures at the Western Harbour Arm, transport improvements, the relocation of some existing business activity and the site at West Sompting requires transport mitigation measures to improve capacity on the A27.

Arun

- There is the potential to provide 11,300 new homes in Arun across a range of growth locations. The precise detail of these locations has yet to be determined, but they could deliver between 650 and 900 houses per year. The options include sites at Angmering, Middleton, Ford, Fontwell, Littlehampton (West Bank), Pagham, Bersted, Ferring, Climping, Yapton and the 'three villages' (Barnham, Eastergate and Westergate).

Chichester

- The Chichester Place Plan sets targets to deliver 3,600 new homes on four strategic development sites by 2031. : West of Chichester (1,600 homes); Tangmere (1,000 homes); Shopwyke (500 homes); and Westhampnett (500 homes). The key to unlocking a number of these sites is increasing the waste water treatment capacity in the District. The solution to this is upgrading the Waste Water Treatment Works at Tangmere, but this is not scheduled to be delivered until 2018.

Worthing

- The Worthing Place Plan sets targets to deliver over 3,000 new homes by 2031. This includes 630 new homes in Worthing Town Centre (Teville Gate – 300; Union Place – 50; Aquarena -140; Grafton Centre – 100; and Stagecoach Site – 40). In addition, 700 homes (and potentially 1,000 homes) are planned for the West Durrington Site. There are a number of viability and infrastructure issues that need to be resolved in order to unlock these sites, some of which are likely to require public investment.

2.5 IMPROVING WORKFORCE SKILLS

The National Picture

- The government is developing a system of employer-led professional and technical qualifications, with respected apprenticeships at its core.
- A new apprenticeship levy will fund the expansion of the national apprenticeship programme and a voucher system aims to create a more demand led system.
- The Government would like there to be a University Technology College within reach of every city in the country and wants there to be better collaboration between employers and learning providers.
- A programme of Area Reviews of Post-16 Education and Learning Provision aims to reconfigure how learning is delivered so that it reflects local economic needs.

The Sub National Picture

- The Coast to Capital LEP Skills Strategy focuses on stimulating demand for skills, improving labour supply and making more effective transitions to work.
- The Review of Post-16 Education and Training Provision in Sussex provides an opportunity to ensure local learning provision reflects the needs of the local economy.
- The Greater Brighton Economic Board has ambitions to improve the supply of local apprenticeships and to develop a local area curriculum.

What this means for Coastal West Sussex

- Low levels of adult skills and concerns about the work readiness of young people are considered by many employers in Coastal West Sussex to be a barrier to growth.
- There is a strong local focus on improving STEM skills, improving careers guidance and vocational pathways for young people and on improving enterprise education within schools and colleges.



The National Picture

The Government sees addressing skills weaknesses as essential to addressing the UK's productivity gap. Central to this is creating a system of "respected, employer-led professional and technical qualifications and opening up the UK's "excellent university sector" to all who can benefit from it.

It plans to strengthen the Maths and English skills of school leavers, increase the number of qualified teachers in STEM (Science, Technology, Engineering and Maths) subjects and ensure that there is a University Technology College "within reach of every city". It will introduce an Apprenticeship Levy on large employers to fund a huge expansion of apprenticeship starts. The funding will be routed through employers, in the form of digital vouchers, with the aim of creating a more responsive, demand-led system.

Colleges will be invited to become Institutes of Technology, delivering high standard sector specific qualifications at Levels 3,4 and 5; and there are ambitions to simplify the range of qualifications that are available to make progression routes clearer. The Government wants to encourage better collaboration between schools, colleges and employers and expects local employers to take a "leading role" in establishing a post-16 skills system that is responsive to local

economic priorities, as agreed in the Post 16 Education and Training Institutions Reviews.

Widening participation in Higher Education remains a government priority and it plans to remove the cap on student numbers that restricts expansion by some universities and it aims to encourage new providers to enter the higher education market.

The Sub National Picture

The Coast to Capital LEP's skills strategy focuses on three main priorities to address skills:

- Stimulating the Demand for Skills by Encouraging Business Ambition;
- Ensure Skills Provision Meets the Needs of the Coast to Capital region's Businesses, Focusing on its Priority Sectors; and
- Ensure People Make Informed Decisions About their Learning and Career Choices.

It focuses on developing skills in its priority sectors: Health & Life Sciences; Creative, Digital & IT; Environmental Technologies; Advanced Manufacturing & Engineering; Financial & Business Services; Food Production and the Visitor Economy. It also recognises the importance of ensuring that the

care and construction sectors are provided with the supply of skilled workers that they need. There is a strong emphasis on improving transitions into work and on improving the supply of people with STEM related skills.

The Greater Brighton Devolution Prospectus stresses the need to increase 17 year olds' participation in education in Adur and Worthing, improve the quality of careers guidance, and improve vocational pathways for young people. There are ambitions to improve employer-education activity, expand the apprenticeship programme, deliver high quality teaching in STEM subjects and create a local area curriculum that targets local high growth specialisms. Its 'asks' of government include devolving National Careers Service funding, retaining revenue from the Apprenticeship Levy and devolving responsibility for commissioning the Work Programme and Youth Contract to the Greater Brighton Economic Board.

The Three Southern Counties Devolution Prospectus sets out aims to address the supply of local skilled people to improve productivity. An aim is to retain more of the skilled people who currently commute to London by providing better quality jobs and to secure greater influence in shaping and commissioning local employment and skills provision so that it better meets business needs. This would include devolving funding for skills and employment programmes targeted at 14-25 year olds and the Apprenticeship Grant

for Employers; establishing a Skills and Employment Board to oversee skills and employment policy; and reshaping local curricula so that they better support growth opportunities in key sectors.

What this Means for Coastal West Sussex

Workforce skills were identified by Nathaniel Lichfield & Partners as a key issue for Coastal West Sussex in their background papers for the Greater Brighton Economic Board. It suggests that in Adur and Arun, in particular, there is a low level of educational attainment amongst the workforce. A strategy that aims to support growth in high value added sectors of the economy will need to be supported by an improvement in skills levels.

The Coastal West Sussex Partnership has emphasised the importance of improving the supply of local skills in its previous actions and it has a strong focus on strengthening links between local businesses and learning providers. The aim is to improve enterprise education, develop new vocational learning pathways and strengthen the supply of people with STEM skills locally.

Adur

- The aim in the Adur Place Plan is to ensure that local people are well placed to secure local high value jobs that are expected as a result of planned growth across Greater Brighton and Coastal West Sussex. This includes preparing for the environmental growth centre in Shoreham and the creative, digital and IT growth centre in Worthing. Local demographic changes mean that there will continue to be a demand for people with skills to manage and deliver high quality care and the Place Plan identifies a need to improve employability skills amongst young people, in particular.

Arun

- The aim is to develop a joint approach between learning providers and local employers to develop skills for local priority sectors (Creative, Digital and IT, Advanced Manufacturing/Engineering, Tourism and Healthcare).
- There is a focus on developing clearer learning pathways, including apprenticeships, to local employment and focusing on interventions that address economic deprivation and poor health outcomes.

- Plans to create a new Digital and Technology Park on the University of Chichester's Bognor Regis Campus will radically extend the university's academic portfolio and increase opportunities to grow new businesses and create jobs both locally and regionally.

Chichester

- The priority is to develop a schools plan that provides school places and a quality education for local residents. The aim is for learning opportunities to be linked with strategic development locations at West of Chichester, Shopwyke and Westhampnett and at sites that have already been permitted (Graylingwell and Rousilliion Barracks).

Worthing

- The Worthing Place Plan aims to ensure that local people are well placed to secure high value jobs that are expected to be provided by the planned growth. This includes developing locally coordinated skills initiatives package that is aimed at key sectors within the economy. The main focus is expected to be in key growth sectors, including Creative, Digital and Information Technology (CDIT), Environmental Technologies and health and social care. There is also a priority to improve transitions from education into the labour market for young people.



2.6 IMPROVING TRANSPORT INFRASTRUCTURE

The National Picture

- The Government plans to create a new Roads Fund, resourced from Vehicle Excise Duty revenues, to fund investment in the strategic road network.
- Parts of the rail network are at or over capacity and many routes, including those affecting Coastal West Sussex have become unreliable. The Government intends to channel resources through the train operating companies, rather than Network Rail to address this.

The Sub National Picture

- Much of transport infrastructure across the Coast to Capital region is operating at over-capacity, contributing to unreliable road and rail routes. The Coast to Capital LEP's priorities include several improvements to the A27, improving east-west coastal rail services, encouraging modal shift, and ensuring that new developments are adequately served by public transport.
- The Greater Brighton Economic Board and the Three Southern Counties Partnership are developing a joint Infrastructure Plan and are looking to secure a ten-year devolved funding commitment from central Government to deliver the actions within it.

What this means for Coastal West Sussex

- Unbalanced economic growth and high levels of out-commuting put pressure on the local transport infrastructure. Both the A27 and A259 become heavily congested at peak times, making journey times long and unreliable.
- The "metro" train system that operates across Coastal West Sussex means that intra-regional journey times are often too long. Connectivity between the area's urban centres needs to be improved and ticketing systems need to be more flexible, so that rail travel is more affordable for lower earners.
- New developments should be well served by public transport, encourage modal shift and recognise a trend in lower car ownership amongst younger people.

The National Picture

An effective transport system connects people to jobs and products to markets and it is fundamental to supporting sustainable economic growth. However, levels of congestion are rising, the quality of the UK's road network lags behind those of many of its main competitors, and the Government estimates that there is a backlog of maintenance works on the road networks of around £8.6bn. The government plans to create a new Roads Fund as part of its Roads Investment Strategy. It will be funded from Vehicle Excise Duty revenues and will be used to fund investment in the strategic road network.

Parts of the rail network are also at, or over, capacity. The number of passenger journeys has increased by 57% over the past decade and many routes, particularly in the south east of England, have become unreliable. The government aims to drive up performance by devolving more power to route managers who are closer to the front line and by channeling public money through the train operating companies, rather than via Network Rail.

The Sub National Picture

Despite its proximity to London and Gatwick Airport, the Coast to Capital region faces several significant transport challenges. Many of its road and rail routes, including the A27, are operating at over capacity, resulting in long and unreliable journey times. In many of the region's towns and cities facilities to support cycling and walking are not as good as they could be. The Coast to Capital LEP Strategic Economic Plan identifies several road schemes that need to be taken forward with Highways England, including: Chichester bypass improvements (A27); Arundel bypass (A27); Fontwell Junction improvements (A27); and Worthing & Lancing corridor (A27).

There are also priorities to improve capacity on the Brighton main railway line, improve east-west rail services along the coast, and remove level crossings, including on the A284 Lyminster bypass. There are plans for a passing loop for westbound trains at Worthing and a long-term ambition for an 'Arundel Chord', which would open up a direct link between Worthing and Horsham.

Other priorities include ensuring that new developments are well-served by public transport, easing congestion in urban centres through road re-configuration, and encouraging sustainable forms of transport.

The Greater Brighton Devolution Prospectus recognises the need for continued investment in the city region's transport infrastructure. In partnership

with the Coast to Capital LEP and the Three Southern Counties Partnership the Greater Brighton Economic Board aims to improve east-west connections identified through a joint Infrastructure Plan, secure a ten-year devolved transport funding commitment from central government; extend the role of bus services so that they are linked to new developments; promote more sustainable forms of transport; and deliver a high speed Brighton mainline rail service.

The Three Southern Counties Devolution Prospectus sets out ambitions to develop a modern transport system across East Sussex, West Sussex and Surrey. This includes making significant improvements to "crucial transport corridors" including the Brighton Main Line and the A27, reducing congestion and removing bottlenecks and improving journey times and reliability. The 3SC Partnership is seeking greater influence over rail franchise commissioning, cooperation agreements with Network Rail and the Department for Transport and fiscal devolution so that transport infrastructure investment decisions can be made locally.

What this Means for Coastal West Sussex

The heavy concentrations of employment in Chichester and Brighton & Hove and strong out-commuting flows from some parts of Coastal West Sussex to the Gatwick Diamond and to London put significant pressure on the region's transport infrastructure.

Improving east-west transport links has long been a high priority locally. Drivetimes between Brighton & Worthing, a distance of just 12.5 miles, can be as much as 60 minutes at peak times and journey times between Brighton and Chichester can be up to one and a half hours.

Rail journeys across Coastal West Sussex are also generally slow. This reflects the current "metro" style stopping service and the absence of express services that provide fast links between major centres across the sub-region.

It is not just journey times that is the problem. Travel costs and reliability are also issues. Congestion on the A27, particularly around Chichester, Arundel and Worthing and on the A259 between Bognor Regis and both Chichester and Worthing makes journey times unpredictable. The unreliability of the Southern Trains' service is recognised as a problem at national level and the structuring of rail fares can make the costs of train journeys to work high for lower income workers, because of the requirement for upfront costs to purchase season tickets.

Transport improvements need to complement the planned housing and employment growth plans in Coastal West Sussex and improve access to and from Shoreham Harbour. This means improving connectivity between employment centres, ensuring that new residential developments are well-served by the local transport infrastructure, increasing the 30 minute journey time distance within the sub-

region, and providing opportunities to grow more sustainable forms of travel.

Adur

- A new A27 Junction and Supporting Sustainable Transport Measures will unlock the mixed use developments at New Monks Farm and Shoreham Airport. The Shoreham Sustainable Transport Package will enable development at Shoreham Harbour and Airport and support long-term mitigation of traffic growth associated with these development opportunities.

Arun

- Improvements to the A29 are required to improve access to and from Bognor Regis growth sites. There is also a need to invest in improvements to the A259 (East Arun) and to deliver the A284 Lymington by-pass. This will link Angmering to the A27 and enable the delivery of the Angmering development allocation of 600 homes and nine hectares of employment land.

Chichester

- Improving the A27, including the Chichester bypass, is a major priority in the Chichester Place Plan. This will enable housing and employment space to be developed in the District. The improvements will be

led by Highways England, but financial contributions will also be sought from developers of the four Strategic Development Locations. There are also plans to reconfigure the road layout of the B2178 that provides access to Northgate in Chichester city centre. This will support growth and improve linkages within the city centre.

Worthing

- The transport priorities in the Worthing largely relate to improving access to and from development sites. These include Decoy Farm, Martlets Way, West Durrington and public realm improvements in Worthing Town Centre.



2.7 IMPROVING DIGITAL CONNECTIVITY

The National Picture

- The Government estimates that investment in high speed broadband and mobile technology could add £6.4bn GVA and deliver 20,000 additional jobs to the national economy by 2024.
- The Government has produced a Digital Communications Infrastructure Strategy that sets targets for 95% of households to have access to superfast broadband speeds by 2017.

The Sub National Picture

- The Coast to Capital Strategic Economic Plan includes actions to improve digital skills, develop ultrafast broadband clusters, improve mobile coverage and cover 'not spots' in rural locations.
- The Greater Brighton Economic Board has plans to develop a network for digital hubs across the Greater Brighton city region and to provide public wi-fi access in its urban areas.

What this means for Coastal West Sussex

- All the local Place Plans prioritise improving ultrafast broadband and 5G mobile coverage in the Coastal West Sussex commercial centres. There are also targets to ensure that rural residents and businesses are well-served by digital technology.
- Develop the Creative, Digital and IT sector is an important local priority, as is ensuring that Coastal West Sussex businesses have access to and have the skills to make best use of digital technology to support their growth plans.

The National Picture

The government estimates that investment in high speed broadband and mobile technology will increase GVA by £6.3bn nationally and create 20,000 new jobs by 2024. Its Digital Communications Infrastructure Strategy sets targets for 95% of UK households to have access to superfast broadband speeds of at least 24Mbps by 2017, up from its current 80% coverage. It suggests that, as well as being a key driver to broader economic development, the digital sector itself is becoming an important feature of the UK economy. It grew at seven times the pace of the economy as a whole between 2008 and 2013 and it now directly supports 4% of employment in the UK and contributes 7.5% of its GVA. E-commerce spending is higher in the UK than in other major nations and broadband and internet usage are comparatively widespread. Fast and reliable internet and mobile connections are now considered to be critical to business success and they contribute to home-working and labour market flexibility.

The Sub National Picture

Improving Digital Connectivity is a key priority for the Coast to Capital LEP, the Greater Brighton Economic Board and the Three Southern Counties Partnership. 'Growth is Digital' is one of the six priorities in the Coast to Capital Strategic Economic Plan. It includes proposed actions to improve digital skills, develop ultrafast broadband clusters, improve mobile coverage and cover the 'not spots' in rural locations. The Greater Brighton Devolution Prospectus aims to ensure that there is continued investment in broadband, with 100% connectivity across the City Region and public wi-fi access in its urban areas. Its proposals include creating a network of connectivity hubs in key centres across the Sussex coast, developing ultrafast broadband and access to 5G mobile. Its 'asks' of government include local control of the BDUK budget and improving the co-ordination of funding streams to support digital connectivity.

The Three Southern Counties Devolution Prospectus has ambitions to develop a 'world-class digital infrastructure' by investing in superfast broadband coverage, using ultrafast dark fibre in the region's towns and rolling out 5G mobile coverage.

What this means for Coastal West Sussex

Gigabit connectivity can act as a magnet for new business development, creating new jobs and bringing new opportunities for small companies and start-ups to compete on a level playing field.

Proposals to create Ultrafast hubs throughout Coastal West Sussex builds on the digital growth seen in Brighton & Hove. It is part of a wider intention, set out in Coast to Capital's Strategic Economic Plan, to drive regeneration and growth by establishing internationally competitive digital connectivity, providing Coastal West Sussex with competitive advantage.

Adur

- The Adur Place Plan focuses on progressing ultrafast (gigabit) speed digital pure fibre network in Worthing and Shoreham, building on West Sussex County Council's programme that will give 95% of residents the option to purchase high speed broadband capability.

Arun

- The Arun Place Plan includes aims to create ultrafast broadband hubs across all the District's coastal areas, develop a digital/creative hub in Bognor Regis and a build new digital/engineering park at the University of Chichester.

Chichester

- The aspiration is to deliver ultrafast broadband (1Gbps) in all urban and growth areas in the District and superfast broadband (30mps) to rural and hard to reach areas. All future developments will have digital connectivity as a planning requirement.

Worthing

- The Worthing Place Plan focuses on progressing ultrafast (gigabit) speed digital pure fibre network in Worthing and Shoreham, building on West Sussex County Council's programme that will give 95% of residents the option to purchase high speed broadband capability.

3

The Economic Plan



3.1 OUR VISION

Our economic plan sets out our ambitions for the Coastal West Sussex economy and identifies actions that the Coastal West Sussex Partnership will take to support the vision that has already agreed for the broader area. This is for Coastal West Sussex and Greater Brighton to be a sub-region:

- Where businesses will want to locate and grow, with a thriving economy supporting a wide range of employment opportunities, high quality, commercially viable sites and a high level of skill and education attainment;
- Which offers a choice of housing to meet the changing needs of the population, with access to a decent home for everyone;
- Which is easy to travel around, with excellent transport links both around Coastal West Sussex and Greater Brighton and to major destinations in the wider South East;
- Where high quality digital communication plays a key role in supporting the way we live and do business;
- Where residents, businesses and visitors continue to benefit from Coastal West Sussex and Greater Brighton's high quality natural environment; and

- Where each town continues to play a different role with its distinctive character, opportunities and 'sense of place'.

The Coastal West Sussex Partnership supports this vision and the themes and actions within this economic plan are designed to make sure that it makes its contribution towards it over the next five years. It also supports the ambitions of the Three Southern Counties Partnership to deliver smart and sustainable economic growth.

The Partnership recognises that many issues that will impact upon the local economy are beyond the scope of its remit and that over the course of the five year strategy, new circumstances that arise may require fresh approaches than those set out in the Plan.

The Coastal West Sussex Partnership will focus on issues where it can make an impact, engage activities where it can add value, and be both flexible and outward-looking in its pursuit of solutions to the challenges that face the Coastal West Sussex economy over the next five years.

The economic plan sets out our guiding principles, links to our vision and actions for the Coastal West Sussex Partnership between 2016 and 2020 under the following four themes:

- Priority Theme 1: Building Business Confidence
- Priority Theme 2: Improving Connectivity and Investing in Infrastructure
- Priority Theme 3: Providing Homes
- Priority Theme 4: Improving Workforce Skills

The actions in the Plan are the contribution that the Coastal West Sussex Board will make towards achieving these. They do not constitute the totality of actions and interventions that will be made by partners to support economic development in Coastal West Sussex over the next five years.

Priority Theme 1: Building Business Confidence

Our Guiding Principles

- Businesses leaders must be confident to invest, expand and grow their operations within Coastal West Sussex and help to identify and support new entrepreneurs from within the area.
- Business leaders must champion investment decisions across Coastal West Sussex, including those to and from London and other accessible economic centres, where there is clear evidence that decisions will impact positively on economic growth, job creation, employment space and housing.

- There must be a coordinated and positive approach to marketing Coastal West Sussex to encourage large and small businesses to invest in the area, whilst celebrating its cultural and creative offer.

Links to Our Vision

A place

- Where businesses will want to locate and grow, with a thriving economy supporting a wide range of employment opportunities, high quality, commercially viable sites and a high level of skill and education attainment.
- Which is easy to travel around, with excellent transport links both around Coastal West Sussex and Greater Brighton and to major destinations in the wider South East.
- Where residents, businesses and visitors continue to benefit from high quality natural environment.

Rationale

- The stock of businesses in Coastal West Sussex grew by 325 (2%) between 2009 and 2014, compared with a 10% increase in stocks across England as a whole. With the right support for local start ups and the provision of suitable commercial accommodation, Coastal West Sussex should expect to see a significant increase in business stocks over the next five years.

- Employment rates in Chichester and Arun are already high, but there is evidence of some labour market slack in Adur and Worthing. The unfavourable projected demographic profile means that there may need to be a focus on attracting new working age residents to Coastal West Sussex and reducing the volume of out-commuting to neighbouring areas if the stock of people in work is to increase significantly.

- Planning processes remain a source of frustration amongst many businesses nationally and locally¹². The Planning policy framework, the incentive based approach to local economic development and the establishment of the Coastal West Sussex and Greater Brighton Strategic Planning Board all provide opportunities to design planning services so that they fully support developments that support sustainable economic growth.

- Road and rail infrastructure improvements are widely seen as vital to improving local economic prospects. Delivering road improvements (to the A27, in particular) and encouraging modal shift have long been high priorities, whilst the unreliability of local rail services has been recognised at national level.

- Major development opportunities, including at Enterprise@Bognor Regis, Worthing Town Centre and New Monks Farm, provide opportunities for a fresh and co-ordinated approach to promoting Coastal West Sussex to inward investors as an attractive business location.



12. Greater Brighton and West Sussex Business Survey, Marshall Nairne Ltd & Emergent Research and Consulting (2014)

Our Actions

1. Active participation in the Coastal West Sussex and Greater Brighton Strategic Planning Board to improve the local planning environment.
2. Lobby and influence developers and raise the profile of the Coastal West Sussex Board to help secure new investment into Coastal West Sussex.
3. Develop and agree assessment criteria and modelling to enable the Coastal West Sussex Board to make informed decisions about prioritising key proposed developments.
4. Develop a Coastal West Sussex Investment Prospectus and undertake a Coastal West Sussex promotional media campaign aimed at attracting and retaining investors.

Priority Theme 2: Improving Connectivity and Investing in infrastructure

Our Guiding Principles

- All key business zones across Coastal West Sussex must have access to ultrafast broadband connectivity to support innovation, creativity and business location decisions.
- There must be a healthy supply of first class business accommodation, which is essential to meet

the needs of new inward investors and businesses wishing to expand in Coastal West Sussex.

- The foundations for economic growth must build on the unique assets of Coastal West Sussex and its component parts whilst complementing those of neighbouring areas.
- Support investment into key infrastructure that improves connectivity across CWS to Brighton, Portsmouth and north to Gatwick and London

Links to Our Vision

A place

- Where businesses will want to locate and grow, with a thriving economy supporting a wide range of employment opportunities, high quality, commercially viable sites and a high level of skill and education attainment.
- Where high quality digital communication plays a key role in supporting the way we live and do business.
- Where each town continues to play a different role with its distinctive character, opportunities and 'sense of place'.

Rationale

- According to the Coastal West Sussex Place Plans, there is 135,500 sq.m of employment space in Arun, 41,000 sq.m in Adur, 90,000 sq.m of allocated space in Chichester, and over 50,000 sq.m of space in Worthing. Not all of this will be developed in the lifetime of this strategy. However, an effective focus on deliverable sites will ensure that there is a significant increase supply of commercial floorspace.
- Digital connectivity is now crucial to successful business locations. Significant progress has been made in improving broadband and mobile technology connectivity in recent years, but improvements are still required, particularly in rural parts of Coastal West Sussex. The growth in the Creative, Digital and IT sector across Sussex provides a good opportunity, with the right investment, to position Coastal West Sussex in the vanguard of digital technology development.
- Coastal West Sussex has considerable economic assets to build on, including specialisms in environmental technologies, culture and creative industries, marine technologies, health and care and horticulture. Our cultural heritage and natural assets make Coastal West Sussex an ideal visitor destination for many types of people, particularly those from in and around London.

Our Actions

1. Work with Coastal West Sussex, the Greater Brighton Economic Board and the Three Southern Counties Partnership to secure ultrafast broadband, better 5G mobile connectivity in key business locations in Coastal West Sussex, and promote the use of the Digital Connectivity Grant.
2. Develop tourism products and services that promote Coastal West Sussex as a whole and help secure efficiency improvements to the organisation of destination management activities.
3. Galvanise the business voice to support investment into the A27 and key infrastructure that improves connectivity and opens up new employment sites.
4. Champion the retention of employment land space allocations for key sites and work with developers and local authorities to help secure development designs that help to broaden the Coastal West Sussex economic base.



Priority Theme 3: Providing Homes

Our Guiding Principles

- Business leaders must champion the need to provide additional homes across Coastal West Sussex, but not at the expense of losing prime business space.
- All new housing developments should include an appropriate element of homes that, considering the Coastal West Sussex average salaries, will be affordable for the local workforce.

Links to Our Vision

A place

- Which offers a choice of housing to meet the changing needs of the population, with access to a decent home for everyone.

Rationale

- Low rates of housing completions have contributed to high housing costs, relative to local earnings. This makes home ownership beyond the reach of many local young people. It also means that Coastal West Sussex risks losing talented young people to other more affordable areas, undermining attempts to strengthen to attract new businesses and strengthen the local economy.

- In-migration from neighbouring Brighton & Hove and from London has added to the pressure to provide more, suitable homes in Coastal West Sussex, particularly for young families, but also for older people.
- The stock of housing in some parts of Coastal West Sussex does not seem to reflect emerging housing needs. There is evidence of under-occupancy of larger homes and a lack of smaller units in some of the area's urban centres.
- The proposed Greater Brighton and Three Southern Counties Housing Delivery Boards provide an opportunity to develop a better co-ordinated approach to increasing the supply of housing locally.

Our Actions

1. Actively support mixed-use regeneration schemes that include housing on allocated land and which are provided with appropriate supporting infrastructure.
2. Support mixed-tenure schemes to help ensure local people can afford to live and work in the area.
3. Work through the Coastal West Sussex and Greater Brighton Strategic Planning Board to plan collaboratively to deliver the level and type of housing needed to satisfy local demand.

4. Ensure the Coastal West Sussex business voice is heard in planning for housing developments in locations that best support business growth.

Priority Theme 4 - Improving workforce skills

Our Guiding Principles

- Business leaders must work collaboratively and build connections with schools, Further Education and Higher Education institutions to develop relevant education and skills programmes, and employment pathways for young people and adults alike.
- All private and public businesses should commit to providing careers and employment advice, apprenticeship, internship and skills development opportunities for people across Coastal West Sussex.

Links to Our Vision

A place

- Where businesses will want to locate and grow, with a thriving economy supporting a wide range of employment opportunities, high quality, commercially viable sites and a high level of skill and education attainment.

Rationale

- Low qualification levels in many parts of Coastal West Sussex contribute to the area's 'low skills equilibrium', where employment levels are high, but jobs are over concentrated in low value added activities.
- Proposed major developments across Coastal West Sussex provide a significant opportunity to attract new, higher value added employment into the sub-region. Local people need to be equipped with the skills to be able to benefit from these new employment opportunities.
- Educational achievement in some schools is still below average and young people without a good foundation in English in Maths, in particular, risk having a weak attachment to the labour market over the longer term.
- Coastal West Sussex organisations will have to contribute a levy of 0.5% of their salary bill that exceeds £3m from 2017 and all businesses will have an annual voucher of £15,000 to fund apprenticeship training. This change in the way apprenticeships are funded and accessed provides an opportunity to secure more business involvement in skill development and enterprise activities.
- The Greater Brighton Economic Board and the Three Southern Counties Partnership are both seeking more local control of skills careers advice funding.

Our Actions

1. Develop a proactive approach to promoting links between local businesses and learning providers through the Coastal West Sussex Skills and Enterprise Group.
2. Work with stakeholders, including West Sussex County Council, to develop a robust and sustainable work programme and to support the organisation of regular STEM activities, such as the Coastal STEMfest and enterprise education events.
3. Encourage the take up of the Apprenticeship Grant by Coastal West Sussex SME employers and work with larger employers to promote training and enterprise activities by businesses in their supply chain.



4

How the plan will be implemented



The Coastal West Sussex Board will have overall responsibility for delivery the key actions within this strategy. These actions will make a contribution to the 2020 visions for Coastal West Sussex under each priority theme.

The Coastal West Sussex Board is one of the five Coast to Capital Area Partnerships, which act as a sub-regional body to support the implementation of the Coast to Capital LEP priorities at local level. It also is a member of the Coastal West Sussex and Greater Brighton Strategic Planning Board.

The figure below shows how Coastal West Sussex Partnership Board supports and reports into other Boards and Partnerships locally and regionally.

The Coastal West Sussex Board is an informal partnership, which brings together leaders and senior officers from business, education institutions and the public sector to work collectively on economic issues that impact on the coast. The Board generally meets four times a year and its main functions are to:

- Coordinate activity between its constituent local authorities and enable them to have a greater collective voice on issues of mutual concern;
- Provide a forum for business to set and to influence public policy on issues that impact on business and economic performance;
- Be an important vehicle for setting local economic development priorities; and
- Be a conduit for delivering the Coast to Capital LEP strategic priorities

It is served by a Management Group, which includes representatives from local authorities and the business community. It meets four times a year and its main functions are to:

- Between meetings of the full Partnership, the affairs of the Partnership are administered by the Coastal West Sussex Management Group.
- The Management Group reports to the full Partnership.

- Where possible input of the full Partnership is sought prior to decision-making. However, the Management Group can be called upon to determine the Partnership's stance on a particular issue in circumstances where the collective opinion of the full Partnership cannot be determined in a timely manner.

- The Management Group is also responsible for assessing financial and performance management responsibility of the thematic groups and the Partnership Board, and reporting back to the Partnership any notable issues.

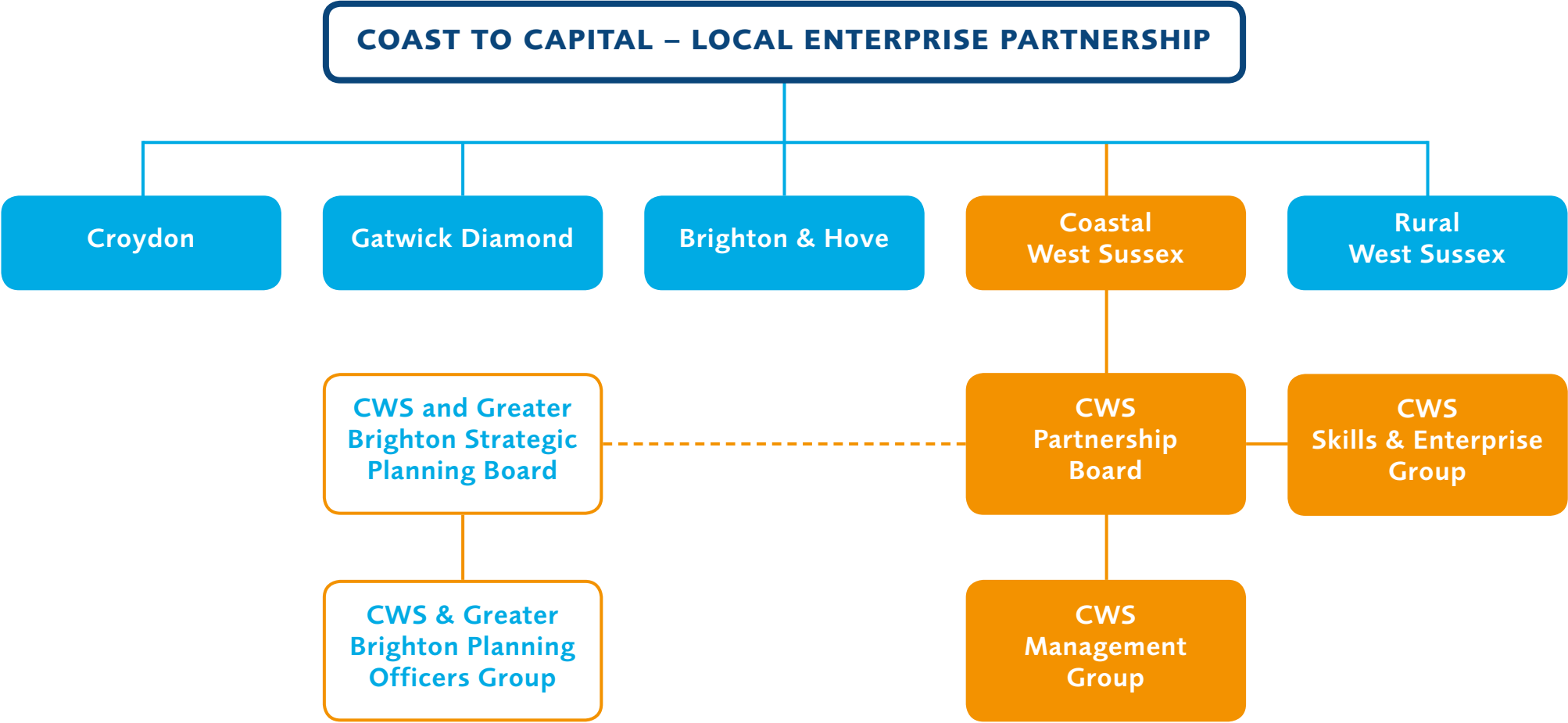
The Coastal West Sussex Partnership Board is also served by a Skills and Enterprise Group, which includes representatives from education, business and the public sector. It meets four times a year and its main functions are to:

- Create a more enterprise experience for young people; and
- Skills for Growth – respond to our growth sectors by creating a ladder of progression and opportunity

The actions of the Coastal West Sussex Partnership are delivered by the Partnership Director, who reports to the Management Group, the Skills and Enterprise Group and Coastal West Sussex Board.

Each of the themes within this strategy will have a Board Champion, who will work closely with the Coastal West Sussex Partnership Director to ensure that the actions within the strategy are delivered.

LOCAL ECONOMIC DEVELOPMENT STRUCTURES



Annex

Annex I: About This Document

This strategy has been developed by Nairne Ltd and Marshall Regen Ltd, in partnership with the Director of the Coastal West Sussex Partnership. It has been funded by Coastal Communities Team Funding guidance on developing Economic Plans.

It has been developed with extensive reference to national, regional and local strategies and plans, particularly the local authorities' Place Plans and in consultation with Board Members and stakeholders.. All data that have been used to inform the analysis within the strategy has been drawn from publicly available datasets and from evidence provided in the Place Plans and background papers and documents, as referenced.

The structure of the Economic Plan and the main priorities and commitments within it have been subject to extensive discussion and subsequent agreement at Coastal West Sussex Board meetings.

The Economic Plan's actions have been developed by the consultancy team and the Director of the Coastal West Sussex Partnership and have been agreed by the Coastal West Sussex Board. These may be subject to change during the life of the strategy, as the need to respond to different circumstances arises.

Annex II: Summary of Major Development Opportunities

This table provides a summary of the major development opportunities in Coastal West Sussex, as set out in the Adur, Arun, Chichester and Worthing Place Plans in February 2016. The homes, commercial floorspace and new job estimates are subject to change, pending more detailed economic impact assessments for each site.

Adur

Shoreham and Lancing
600 new homes, 25,000 sq.m of commercial floorspace, 2,000 new jobs

Shoreham Harbour
970 new homes, 16,000 sq.m of commercial floorspace, 1,300 new jobs

Arun

Greater Bognor Regis
109,000 sq.m of commercial floorspace, 4,100 new jobs

Greater Littlehampton
2,600 new homes, 27,000 sq.m of commercial floorspace, 1,200 new jobs

Chichester

West of Chichester
1,600 new homes

Tangmere
1,000 new homes

Shopwyke
500 new homes, 40,000 sq.m of employment land

Westhampnett
500 new homes

Chichester Industrial Estates
250 new jobs

Worthing

Town Centre
630 new homes, 3,000 sq.m of commercial floorspace, 5,500 new jobs

Decoy Farm

Annex III: Coastal West Sussex Board Members

The table below shows the membership of the Coastal West Sussex Board, as at February 2016. The Partnership is informal and therefore welcomes new business people to contribute to its work programme.

Local Businesses

<i>Organisation</i>	<i>Representative</i>
GlaxoSmithKline	Kirk Brown - Chair
Lancing Business Park	Damian Pulford
	CC-Michael Punter
Ricardo	Andrew Swayne
Southern Water	Susan Solbra
Shoreham Port	Peter Davies
West Sussex Growers Association	John Hall
Butlins	Jeremy Pardey
Stiles Harold Williams	David Martin
Inpress Plastics	Henry Powell
Carpenter Box	Chris Coopey
Body Shop	Neil Jarvis

Business Representative Organisations

<i>Organisation</i>	<i>Representative</i>
Institute of Directors	Howard Wilder
Federation of Small Businesses	Ann Swain
Worthing and Adur Chamber	Tina Tilley
Chichester Chambers	Kerry Kyriacou
Chichester Chambers	Alan Edmonds
Bognor Regis Ltd	David Myers
Marine South East Ltd	Iain Shepherd

Local Authorities

<i>Organisation</i>	<i>Representative</i>
Adur District Council	Alex Bailey
	Cllr Pat Beresford
	Martin Randall
Arun District Council	Cllr Gillian Brown
	Karl Roberts
	Nigel Lynn
Chichester District Council	Steve Oates
	Gillian Keegan
	Diane Shepherd
West Sussex County Council	Nigel Peters
	Duncan Barratt
Worthing Borough Council	Cllr Byran Turner

Stakeholders

<i>Organisation</i>	<i>Representative</i>
Coastal West Sussex Partnership	Caroline wood
Department for Business, Innovation and Skills	Philip Carr
Coast to Capital Local Enterprise Partnership	Julie Kapsalis
	Paul Castle
Northbrook College	Sue Dare
University of Chichester	Romy Jones
Chichester College	Shelagh Legrave



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