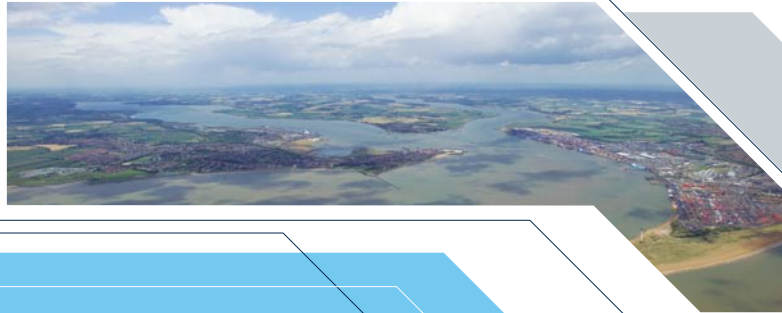




HAVEN GATEWAY PARTNERSHIP   
**BEST OF BRITAIN**

*Delivering opportunity, jobs and growth*



# THE RATIONALE - AN ENGINE OF GROWTH

*The Haven Gateway sub-region is one of the fastest growing areas in the UK. It has a compelling vision and through its ports is a hugely prosperous international gateway, with a clear economic identity whose success is crucial to both Essex and Suffolk as well as UK plc.*

The Haven Gateway's identity and proposition remains compelling and our achievements to date have created a firm foundation for continued success.

Despite the pace of growth slowing slightly due to the recession, the Haven Gateway remains ahead of its housing trajectory with significant growth set to continue. There will be some 100,000 additional people living in the sub-region by 2031 (on top of the 70,000 that have arrived since 2001) with Colchester and Ipswich both identified in the top ten fastest growing UK towns.

Since 2001, creating opportunities and benefits to all those who live and work in the sub-region, through developing communities, attracting investment and unlocking infrastructure, are all key achievements of the Haven Gateway Partnership.

This report sets out the key economic priorities for the sub-region – demonstrating what success looks like through the delivery of breakthrough projects and activities and stronger and more effective collaboration to provide the right environment and investor confidence for business to grow.





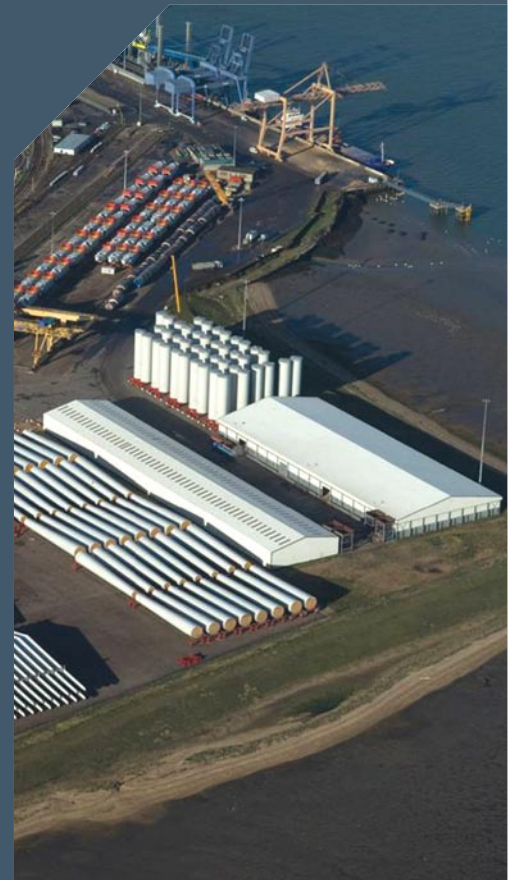
## THE ROLE OF THE PARTNERSHIP

The Haven Gateway Partnership is a public/private sector partnership adding weight of voice, capacity, knowledge and know-how. It is an outward facing economic partnership and has the enviable position of being able to take a helicopter view of this important sub-region and strategically influence and guide effective and integrated delivery of housing and economic growth challenges and ongoing investor confidence – the total place model.

The public/private interface continues to offer a robust and unique package that will be important in seeing this sub-region continue to grow sustainably and significantly.

### *It offers:*

- An international gateway – servicing both the Haven Ports and London Stansted
- Proximity to market – London and Europe through the ports
- A low cost base
- Key strengths in telecoms, low carbon, ports and logistics, tourism and creative industries
- Acute housing need and demand
- A resilient and balanced economy
- A clear investment plan that provides a clear indication of where growth and infrastructure will come forward
- A suite of housing and employment sites which provide a return on investment and ensure a pipeline of projects as the economy strengthens
- A stable and well-functioning Partnership, joining up both public and private sector aspirations
- A commitment to deliver sustainable, smarter growth backed up by a robust evidence base and both strategic and tactical intervention
- An economic intelligence framework and agreed advocacy plan influencing both policy and targeting of increasingly scarce resources





## PURPOSE

The Haven Gateway Prospectus sets out the Partnership's vision for delivering economic growth across the sub-region over the next 3-5 years. It has unique competitive advantages over many other areas. It articulates and prioritises the key economic sectors and projects throughout the sub-region.

This document presents the key sectors for development and the opportunities for investment to integrate the delivery of significant housing and economic growth.

*Without intervention, the sub-region is likely:*

- To undershoot its original job targets by 15% but remains on trajectory to achieve its housing targets creating a major imbalance
- To significantly under deliver its affordable housing targets (current trajectory 18% against a target of 35% - 40%)
- To increase the infrastructure deficit in the sub-region so increasing congestion
- To increase its use of carbon
- To see a decline in the level of accessible open space
- To only show marginal increase in GVA
- To show a worsening skills situation



## OBJECTIVES & TARGETS

*The Haven Gateway Partnership was set up in 2001 primarily to support the consent of expansion for Felixstowe and Harwich ports and ensure maximum value was obtained from the sub-region's role as an international gateway.*

*The granting of Growth Point status in 2006 significantly broadened the role of the Partnership and its vision and priorities were confirmed in 2008 with the publication of its corporate statement – Delivering Smarter Solutions – 2008 -11. In the context of a new government, the recession and Local Government Review, the partnership has agreed to revisit this statement in the winter of 2010/11.*



## TOTAL PLACE HAVEN GATEWAY INVESTMENT PLAN

The sub-region's investment plan was published in December 2008 and sets out the key infrastructure priorities that will deliver the significant economic and housing growth scheduled for the sub-region.

It is underpinned by a programme of development that identifies where funding will be prioritised over the next 5 years. In particular, this has formed the basis to allocate growth funding 2008 - 11 but also presents the opportunity for a single underpinning programme of delivery to which other regional agencies can identify funding – the 'single conversation' and a means by which other funding sources such as planning tariffs, tax increment financing and local asset-backed vehicles could be prioritised.

*The Partnership has agreed to redraft its investment plan by December 2010 so that it will be the primary form of evidence to support any further Growth Fund application. In doing so, it also presents the opportunity to develop increasingly joined-up services across the Haven Gateway to deliver more integrated working so creating a stronger value proposition and to use this joined-up model in a more targeted and Total Place structure.*





# GOING FOR GROWTH

*Low Carbon Energy | Creative Industries | Ports and Logistics  
Innovation, ICT and Broadband | Tourism*



*'The Haven Gateway has and will continue to be at the forefront of delivering significant sustainable growth.'*



## GOING FOR GROWTH LOW CARBON ENERGY

*Tackling climate change and long-term energy security for the future will require the delivery (and decommissioning) of new and obsolete technologies and new markets in nuclear, offshore wind and solar energy. The Haven Gateway is uniquely placed with the most accessible deep sea port facilities close to the North Sea wind farms; Sizewell and Bradwell nuclear power stations and unique solar opportunities.*



### Key Facts

Phase 3 Development of offshore wind farms is anticipated to generate some £80bn investment and up to 70,000 new jobs

Deep water facilities at Harwich provide a unique offer and proximity to these developments being only 70 miles from the East Anglian Array wind farm

Harwich is being used extensively to support the wind farm development of Gunfleet Sands, Greater Gabbard and Thanet

### The Market

Working with Norfolk and Essex, the energy and low carbon sector is already well established and has an estimated market value of £33bn in 2009/10. Nuclear power had an annual market value of £3.7bn scheduled to increase annually by 2.6%. North Sea wind farm development is anticipated to deliver up to 70,000 jobs and some £80bn investment. The redevelopment of Sizewell will cost some £3bn and create up to 5,000 jobs through construction

### The Key Propositions

Working with First East, Essex, Suffolk and Norfolk to deliver maximum economic benefit from the low carbon cluster

To deliver planning consent for the redevelopment of Bathside Bay by the end of 2010 and secure redevelopment as a major manufacturing/marshalling hub to service the delivery of North Sea wind farms

Work with Suffolk/Essex on a delivery framework for nuclear decommissioning and development

Establish a coherent skills framework for the sector in the region

Work with University of Essex and regional bodies on the feasibility of solar provision

Using 'eco-development' funding to explore opportunities for low carbon housing development

### Key Successes – 2011-2014

Harwich secures significant role in servicing the London Array development

Bathside Bay developed as a hub for the manufacturing/marshalling to serve the North Sea wind farm development

Sizewell C project confirmed and development agreement with EDF agreed

Low-carbon skills plan adopted and delivered within the region





## GOING FOR GROWTH CREATIVE INDUSTRIES

*Creative industries contribute some 6.2% to the UK economy with over 2 million people employed nationally. Creative industries directly affect place as well as economic benefit, as the availability of 'creatives' provides a key opportunity to broaden thinking and provide a different perspective on the issues.*



### Key Facts

There are 1664 businesses in the creative sector across the Haven Gateway employing 18,000 people with a turnover in excess of £1.2bn annually

The sector accounts for 8.8% of all employment in Haven Gateway, as compared with 6.7% in the UK

Over the next 5 years, the sector will require an additional 2,570 permanent FTE employees and an additional 7,000 freelance / temporary employees will be required. In 5 years' time, creative employment in the area will total 27,800 FTE jobs – an increase of 22% on current levels

The Haven Gateway has three major cultural economic hubs – in Ipswich (Dance East/New Wolsey), at Aldeburgh (Aldeburgh Music) and Colchester (First Site due to open in 2011)

### The Market

The creative industries contribute some 6.2% to the UK economy and are predicted to grow on average at more than double the rate of the rest of the economy – some 150,000 more people mostly in managerial, professional and highly skilled occupations. The UK has the largest music market in the EU, and third largest in the world. The UK is also the biggest developer base in Europe for computer games

### The Key Propositions

To deliver three cultural economic hubs across the sub-region and particularly reinforce the economic impact of the First Site investment

To provide additional studios and incubator units

To work with EEIDB and Colbea to increase business support and to develop the creative industry sector

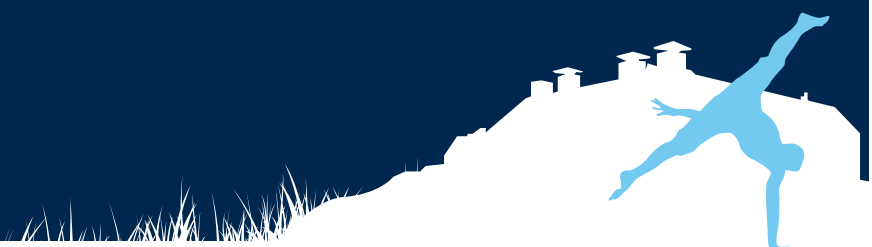
Collaborate with HG partners on delivering a joined-up cultural offer promoting cultural tourism and specifically turning day visits into short stays

### Key Successes – 2011-2014

Delivery of a collaborative Haven Gateway 2012 cultural programme to encourage cultural tourism during 2012 and deliver an additional 'maritime centres theme'

First Site opens together with an adjacent creative hub workspace as part of the cultural economic hub joint prospectus with the Arts Council

Aldeburgh Music delivery of World Youth Orchestra in 2012 as part of the Cultural Olympiad



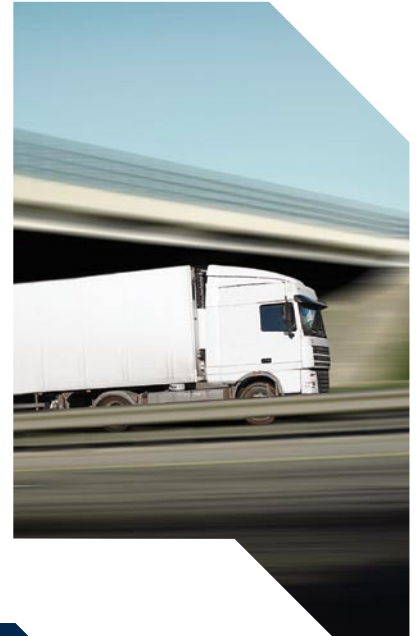


## GOING FOR GROWTH PORTS & LOGISTICS

*The Haven Gateway is the UK's principal gateway for boxed freight and includes the UK's largest container port - the Port of Felixstowe. In addition there are four other Haven ports – Ipswich, Harwich Navyard, Mistley and Harwich International Port. Ipswich is the largest agri-port in the UK and Harwich International a major passenger gateway and the UK's third largest cruise port.*

40% of all the UK's freight crosses the Orwell Bridge and the port, with its deep sea facilities and close proximity to the Channel shipping lanes, is first point of call in Europe to the world's largest freight ships. With Phase 1 of the Felixstowe South configuration due to open later in 2010, capacity at Felixstowe is set to expand by 50% placing increase demands on the rail and road network.

The Ports and Logistics industry already delivers some 32,000 jobs across the Haven Gateway, at an average wage 20% above the regional average.



### Key Facts

This sector employs some 32,000 people across the sub-region  
- 18% of the workforce

Phase One of Felixstowe South reconfiguration will be completed in late 2010

The average wage in the sector is £29,000 – approximately  
20% above the regional average

### The Market

Proximity to ports is one of the key locational advantages for many businesses across the sub-region and historically the Haven Ports have underpinned economic growth in this region for centuries. Initially in agricultural goods and machinery and more recently in global containerised freight, the Haven Ports are critical to the success of UK plc – daily ro-ro servicing of the London fruit and veg markets; exporting of grain from the Suffolk agricultural economy and the importing of timber from the Baltic states; aggregates to serve the Olympics; an increasing role in servicing offshore wind farm development and the UK's largest container port.

### The Key Propositions

Work with all the Eastern region's ports on a stronger voice for ports and gateways as part of the region's economy

Explore with the ports, EU and other innovative financial solutions to deliver improved transport infrastructure including twin-tracking the Bacon curve

With EEIDB, Choose Suffolk and Invest Essex, market the Haven Gateway's 'agile manufacturing' proposition

Increase market share of the cruise sector

### Key Successes – 2011-2014

Haven Ports deliver ongoing 'busiest years'

Funding secured for twin tracking Bacon curve and further investment north of Leicester on F2N and funding secured for the FSR rail terminal

The allocation of additional land (up to 200 acres) to support the sector and its development to provide additional jobs to support increased economic benefit from port expansion





## GOING FOR GROWTH INNOVATION, ICT & BROADBAND - THE 'WIRELESS SUB-REGION'

*The Haven Gateway is home to the UK's largest IT research and development facility at Martlesham. Businesses benefit directly through increased productivity, facilitating innovation and access to new markets.*



### Key Facts

The roll-out of superfast broadband creates jobs – it is projected that a nationwide roll-out could create 600,000 jobs adding £18bn to GDP and a 10% increase in broadband penetration delivers 1% increase in GDP

By 2012, £1 in every £5 of all new commerce will be online

UK users spend more time online (34 hours per month) than users elsewhere in Europe (24 hours)

### The Market

There are over 17 million broadband lines in the UK projected to grow to 21 million by 2011 – spending some 10% value of all sales (of non-financial sector businesses). For users, better connectivity means greater consumer choice and access to online public services and information. With speeds rising, there is greater demand for components to handle ever increasing bit rates, speeds in excess of 100 Gb/s, and capacity through new products and technology

### The Key Propositions

The delivery of Martlesham – Open Innovation creating 2,000 additional jobs, complementary to the Centre of Integrated Photonics at Martlesham

IDEA – the delivery of the skills escalator

Accelerated roll-out of superfast broadband and innovative solutions to provide broadband in rural areas

### Key Successes – 2011-2014

Universal broadband coverage throughout the sub-region by 2012

Superfast broadband to key growth nodes

Delivery of Innovation Martlesham incubator





## GOING FOR GROWTH TOURISM

*Tourism is one of the fastest growing sectors in the UK, with the East of England showing the fastest increase in leisure trips nationally. As well as a destination, particularly for day trips and short stays, the sub-region provides an important gateway to passengers through Harwich International Port – some 500,000 visitors. The Haven Gateway is in close proximity to the UK's third largest airport at Stansted.*



### Key Facts

21,700,600 visitor trips are made to the sub-region annually creating a value of trips estimated at £1,185,305,750

The industry directly supports some 25,390 jobs across the sub-region

Fastest growing region in the country for leisure trips - provisional figures for international arrivals for the full year 2009 vs 2008 and for holiday visits showed more growth than any other region with a significant 25% uplift. Total nights stayed also grew by 13% (2nd highest) and average spend grew 30% (3rd highest)

Together with the highest growth in the domestic staying market, the region is the fastest growing region for leisure trips

### The Market

The sub-region provides an authentic experience for the discerning visitor. The visitor economy is now the largest employer in Suffolk and it directly contributes to food and drink, transport, culture and other sectors. Currently, with a favourable exchange rate, UK tourism is directly benefiting from a robust value proposition likely to be reinforced by the Olympics in 2012

### The Key Propositions

Tourism is primarily led through joint work with Visit Essex, Choose Suffolk and East of England Tourist Board. A joint action planning between the three parties together with HGP will be published

### Key Successes – 2011-2014

Increased joint working between Choose Suffolk to deliver visitor growth to the sub-region including:

Delivery of a 'A Big Weekend' throughout the Haven Gateway

Specific Olympic related interventions to support tourism: *Gateway to the Games; additional campsite provision; joint itineraries throughout the sub-region; sub-regional familiarisation visits for visiting journalists*

Increased short stay visitors

International marketing campaign with main carriers

Increasingly joined-up cultural activities





## BEST OF BRITAIN CONCLUSION

*The Haven Gateway has and will continue to be at the forefront of delivering significant sustainable growth. The forecasts for growth in these key sectors are compelling. The sub-region is uniquely placed to benefit from these sectors, which are at the forefront of economic growth and deliver a sense of place as well as an economic based solution.*

We have clear, ambitious and evidenced plans and a strong record of delivery. In more challenging times we will need to be more innovative, more joined-up and willing to use new approaches to make things happen.

Increasingly, the delivery of smarter, sustainable growth will require increasingly joined-up working between the public sector bodies so that in the context of the regional spatial strategy and regional economic strategy we can deliver integrated housing and economic growth within the sub-region.



[www.haven-gateway.org](http://www.haven-gateway.org)

HAVEN GATEWAY PARTNERSHIP  
SUITES 3 & 5 THE CENTRE  
THE CRESCENT  
COLCHESTER BUSINESS PARK  
COLCHESTER  
ESSEX, CO4 9QQ

T: 01206 843753  
F: 01206 848419  
E: [info@haven-gateway.org](mailto:info@haven-gateway.org)



The authors of this report are employed by the Haven Gateway Partnership. The work reported herein was carried out with grant aid paid by EEDA. Any views expressed are not necessarily those of EEDA. © Copyright 2010

TREBUCHET DESIGN | +44 (0)1473 213000