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## Executive summary

***Norfolk and Suffolk are the UK's clean growth region. Our ambition is to be a globally leading clean, technology-driven and inclusive economy which delivers sustainable food production and energy generation in the transition to a post-carbon economy.***

With an economy worth £36 billion<sup>1</sup> Norfolk and Suffolk make a significant contribution to UK plc. It is a diverse economy with globally competitive clusters and growing specialisms from agri-food and clean energy to ICT and digital creative.

Norfolk and Suffolk are strongly connected with the rest of the world. Felixstowe is the UK's largest container port and handles around 40% of its container trade. Norwich, Stansted and Schiphol Airports are within close reach and connect people to over 400 global destinations. The region benefits from fast links to London and Cambridge.

The two counties have one of the highest concentrations of knowledge-intensive activity in the country. Around 8000 people work across science parks and innovation and research centres covering specialisms from UX design, AI and advanced engineering to clean energy, marine and microbiome research.

High-growth firms flourish here, with 43% growth since 2012 significantly out-pacing both the eastern region, 23%, and the UK 12%. Norwich and Ipswich are in the top 10 fastest growing cities in the UK with vibrant, diverse economies.

Record numbers of people are engaged in the economy, with 81% of the working age population in Norfolk and Suffolk active, and employment levels exceed the national average. Skills levels and wages levels however are lower, but that gap is closing.

The Norfolk and Suffolk economy has clear and well-defined potential for growth. This strategy sets out a series of coherent and specific interventions, which aim to lift the area's productivity closer to the national average. The scale of the productivity prize is significant. If Norfolk and Suffolk were operating at the same productivity rate as the UK average, it would contribute an additional £4 billion GVA per annum.

This strategy is based on robust evidence and has been developed by a strong local partnership of businesses, local authorities, social enterprises, universities and colleges. It builds on the priorities and targets set by local partners in the Norfolk and Suffolk Economic Strategy, the local blueprint for inclusive growth and productivity gains, with an overall goal to transform the economy into one of the best places in the world to live, learn, work and do business.

This will be driven by our major strengths in clean energy, agri-food and ICT digital, and a wider programme to drive up productivity and innovation in business across our foundation sectors.

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<sup>1</sup> Norfolk and Suffolk Local Industrial Strategy evidence base – contains all data in this document unless otherwise stated.

## **Our Potentials**

### **Clean Energy – Powering the world**

Norfolk and Suffolk are at the epicentre of the world’s largest market for offshore wind energy . This is worth just under £1 billion a year. Once planned investment and new generation projects are on stream, the region will be the largest contributor of clean energy to the UK and central to a successful national transition to a zero carbon economy.

Planned investment in renewable and nuclear power generation will produce enough energy to power more than 58% of the UKs homes. Transforming the local energy system and new innovations in energy wider resource use will drive productivity gains across all businesses.

The region’s expertise extends to other sources of energy including nuclear, solar, anaerobic digestion and natural gas - the low carbon transition fuel.

As well as a key role in the production of energy, Norfolk and Suffolk is also playing a leading role in the transition to a zero-carbon economy. Working with Hertfordshire Local Enterprise Partnership and Cambridgeshire and Peterborough Combined Authority and the wider Greater South East Energy Hub to deliver the Local Energy East Strategy and local projects at scale which will benefit communities, private investors and businesses operating in the low carbon sector, is a priority.

***Norfolk and Suffolk are well placed to be a global exemplar for clean, low carbon energy production, exporting services and skills globally, expanding the distribution of affordable sustainable energy to our local communities and businesses.***

To maximise the clean energy opportunity local partners will work with government to develop an All Energy Centre of Excellence which brings together the strengths, capability and capacity of Norfolk and Suffolk’s fifty years of all energy expertise and focuses on supply and demand, innovation around new technology and supports the collaboration across industry to develop a shared all energy workforce.

### **Agri-Food – Feeding the world**

Norfolk and Suffolk are home to the largest agri-food sector the UK generating £3.5 billion worth of output per year. Agriculture is changing fast. Opportunities such as automation are transforming agriculture, streamlining crop and livestock production, and informing crop and soil modelling. At the same time, soil degradation, biodiversity loss and climate change alongside a growing global population are driving new challenges and consumer behaviours.

The two counties have a world-leading research base centre at [Norwich Research Park](#) (NRP) which is at the forefront of global agri-food research and Europe’s largest single site hub of research, training, education, and enterprise in food and health. There are few places which are so uniquely equipped to make telling contributions to the major challenges facing the world in the 21st Century: food and energy security, healthy ageing and living with environmental change.

***Norfolk and Suffolk has all the ingredients to develop, pioneer and apply new approaches to sustainable agriculture, utilising clean energy and innovative water management, and increase value added processing and exports through the applications of new technologies and systems.***

To maximise the clean agri-food opportunity local partners will build an innovation hub for regional food processing innovation and business growth in Norfolk and Suffolk, working with research and education institutes across the region

### **ICT Digital – Connecting the world**

[Adastral Park](#), near Ipswich, is home to BT's Global Research and Development HQ, and a growing cluster of 128 high-tech companies at Innovation Martlesham, employing 3,843 people, generating £515m GVA with a comparatively high productivity rate of £140,000 per job. It is a recognised centre of commercial research for quantum technologies, and has the ecosystem necessary to become the national centre for developing the UK's converged digital infrastructure and a global centre for the digital economy. It plays a significant role in the technology evolution being UK's number one pattern filer for Artificial Intelligence.

Norwich has a growing cluster of digital creative businesses, as recognised by the Tech Nation report, Norwich University of the Arts (NUA), with its specialism in arts, design and media, is centre of the dynamic creative community and home to the Ideas Factory incubation centre for digital creative businesses and UX Lab.

The city boasts a rich ecosystem of interlocking meet-up groups catering to a range of tech and digital interests, with strong links to Cambridge through the Norwich to Cambridge Tech corridor and to Shoreditch in London in 90 minutes.

Comparative strengths in ICT/Digital including machine learning, automation and satellite technology, present opportunities to integrate new technologies into agri-food, clean energy and the wider economy of Norfolk and Suffolk.

***Grow and secure the ICT and digital creative clusters at Adatral park and Norwich as national assets and establish a UK first unique advance highspeed optical wireless network which interlinks Internet of Things testbeds to support large-scale experiments, strengthening Norfolk and Suffolk's position as a leading area in AI and data intelligence and sharing.***

Local Partners will work together with government to deliver the Adastral Park 2025 vision, to take the site to a new level as a major national strategic asset and growth engine for the UK ICT sector. Through the High-Potential Opportunity offer that is being developed with the Department for International Trade which will bolster inward investment activity and drive new overseas investment to the site. Working together to further develop the facilities which will help deliver UK leadership in the global ICT sector, accelerate the growth of the UK's emerging telecoms software manufacturing sector and grow the Innovation Martlesham cluster to over 200 ICT companies and academic partners.

Building on the accomplishments of the Norwich University of the Arts who are ranked in the world's top 10 for game development and securing an international reputation for producing graduates who excel in a constantly evolving industry and the emerging cluster, local partners will create a new digital accelerator centre for scale up businesses in the digital and creative

cluster centred in Norwich, including co-working space and networks, supported by both the University of East Anglia and Norwich University of the Arts.

Led by BT Adastral and the University of East Anglia, region wide partners, including those in Cambridgeshire and Essex will work together to develop the economic case for a Smart Emerging Technology Institute and testbed (SETI) – a unique advanced high-speed optical and wireless network (including 5G) which interlinks Internet of Things testbeds to support large-scale experiments. These experiments will generate vast amounts of valuable real-time, real-world data. SETI's users will be able to share this data in a controlled manner without relinquishing ownership.

### **Enhancing the foundations of productivity**

This Local Industrial Strategy also recognises the strengths of the foundation sectors in the Norfolk and Suffolk economy - financial services, culture and the visitor economy, ports and logistics, advanced manufacturing and construction. Tackling the productivity challenges in these sectors is a key part of the Local Industrial Strategy.

**Ideas:** Norfolk and Suffolk have strong innovation assets, but innovation is concentrated in a small number of innovative firms, such as Nova Farina (Norwich), Mirus (Hingham), PBD Biotech (Thurston), Coderus (Innovation Martlesham) and world-class research assets, including Norwich Research Park and Adastral Park, near Ipswich. There is a long-tail of non-innovative businesses.

Norfolk and Suffolk partners will work to increase the number of businesses innovating and investing, including increasing diffusion and commercialisation to support clean growth.

This will include strengthening and developing innovative networks which enable the right ideas to move from discovery through to commercialisation, linking up innovation centres across Norfolk and Suffolk's and neighbouring areas which will result in greater impact by increased collaboration and coordination.

**People:** People are the heartbeat of any economy; a strong and sustainable supply of skilled people are vital to its success and size. Norfolk and Suffolk have a large, diverse and growing population. Like most areas in the UK, there are distinct inclusive growth challenges.

Local partners will continue to work together to grow an inclusive economy with a highly skilled workforce where skills and employment provision meets business need and the aspirations of individuals.

Improving technical skills and adopting new techniques will further drive productivity and growth. Many businesses across different sectors have increasingly similar technical needs. Further developing links between businesses and world class universities will help further drive innovation.

Building on existing partnership working to raise aspiration and take up of the skills needed to benefit from highly skills local opportunities, particularly in digital and energy.

**Infrastructure:** Boosting infrastructure enables success. Places and communities are interconnected, depend on transport links and draw on many of the same labour market and supply chains.

Norfolk and Suffolk will work to increase local investment in energy and water efficiency, storage and management infrastructure, alongside existing transport, housing and digital that will enable all residents to take advantage of economic opportunities.

**Business Environment:** The two counties have a strong business environment and good levels of business support. Businesses that start here, stay here with good business survival rates – almost 47 per cent of firms are still in business five years after starting up, which is higher than comparators. With a lower than average business death rate, the economy is challenged by a long-tail of low productivity firms, which are likely to be small businesses, particularly given higher than average proportions of small companies in the business base.

New programmes will be put in place to target business growth and scale up, alongside improved sustainability, resource use and exporting, in order to drive productivity. There will also be a focus on helping companies raise investment and attract new business and new talent to the area.

**Places:** Norfolk and Suffolk are an attractive place to live consistently attracting more people of all ages, including young people, families and skilled professionals, than leave the area.

There are major growth locations in Norfolk and Suffolk, with a robust evidence base and detailed understanding of what is needed to continue to drive and unlock their further successes. These locations are Norfolk and Suffolk's priority places:

- Ipswich and the surrounding area.
- Norwich and the Greater Norwich area.
- The Norfolk and Suffolk Energy Coast, including Bacton, Great Yarmouth, Lowestoft and Sizewell, with assets on and offshore.
- The Cambridge-Norwich corridor growth – connecting two global centres of research.
- The critical east-west growth corridors along the A47 from Lowestoft and Great Yarmouth to King's Lynn and the A14 from Felixstowe through Ipswich, Stowmarket, Bury St Edmunds, Newmarket and Haverhill to Cambridge /Peterborough.
- King's Lynn - and the A10 and rail corridor to Cambridge.

Norfolk and Suffolk will build on the place-focused approach to improving access to skills and employment agreed in its economic strategy, recognising the different requirements of its towns, urban, coastal and rural areas, connecting pockets of significant deprivation which exist alongside the largest future opportunities.

Local Partners will communicate a clear, ambitious offer to the world central to attracting the people, investors and businesses of the future.