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Date: Thursday, 30 October 2025

### Dear Councillor,

### **Hull and East Yorkshire Business Board**

The next meeting of the **Hull and East Yorkshire Business Board** will be held at **11:00** on **Thursday, 06 November 2025 in Ergo, Bridgehead Business Park**.

The Agenda for the meeting is attached and reports are enclosed where relevant.

<u>Please Note</u>: It is likely that the public, (including the Press) will be excluded from the meeting during discussions of exempt items since they involve the possible disclosure of exempt information as describe in Schedule 12A of the Local Government Act 1972.

Yours faithfully,

& planking

**Democratic Services Officer** 







Tel: 01482 300300

Town Clerk Services, Hull City Council, The Guildhall, Alfred Gelder Street, Hull, HU1 2AA

### **Hull and East Yorkshire Business Board**

### To: **Membership:**

Councillor Ross

**Councillor Handley** 

Amelia Caruso

**Andy Capes** 

Angela Kirkwood

Beckie Hart

**Chris Crystal** 

Daniel Haley

David Hall

**David Garness** 

Finbarr Dowling

Jason Speedy

Jo Barnes

Katy Swaby

Madge Moore

Mark Barrett

Martin Corcoran

Paula Gouldthorpe

Phil Ascough

Phil Jones

Robert Brocklesby

Stephen Parnaby OBE

Thomas Martin

### **Hull and East Yorkshire Business Board**

### 11:00 on Thursday, 06 November 2025

### Ergo, Bridgehead Business Park

### AGENDA

### PROCEDURAL ITEMS

### 1 Apologies

To receive apologies for those who are unable to attend the meeting.

### 2 Declarations of Interest

To remind members of the Board for the need to record the existence and nature of any Personal and Discloseable Pecuniary interest in items on the agenda.

### 3 Minutes of the Meeting held on 13th June 2025

5 - 8

To approve the minutes as a true and correct record.

### **NON-EXEMPT ITEMS**

### 4 The HEYCA Gameplan – Draft for Consultation

9 - 50

This report presents the draft HEYCA Gameplan for consideration.

### 5 Local Growth Plan Development: Stage 1 Consultation

51 - 186

The paper outlines the overall approach and current activity to developing a Local Growth Plan for Hull & East Yorkshire Combined Authority through an initial stage 1 consultation.

6	Hull & East Yorkshire Local Get Britain Working Plan – Edition	187 -
	1	194

The purpose of this report is for HEYCA Business Board to be informed on the development of the Get Hull & East Yorkshire Working Plan.

# 7 Energy Security Update 195 - 200

To provide an update on energy security.

# 8 HEY Growth Hub & Programmes - Operational Update 201 - 206

This paper provides an overview of the Growth Hub activity in the six months to 30th September 2025. It also provides an overview of the performance of the Growth Hub's discrete programmes.

### **EXEMPT ITEMS**

### 9 No Exempt Items

THERE ARE NO EXEMPT ITEMS ON THIS AGENDA



### **HEY Business Board**

### 10.00am on 13th June 2025

### **Ergo, Bridgehead Business Park**

### **Members Present**

Jason Speedy (Chair), Phil Ascough, Jo Barnes, Mark Barratt, Robert Brocklesby, Andy Capes, Amelia Caruso, Martin Corcoran, Chris Crystal, Finbarr Dowling, David Garness, Paula Goldthorpe, Daniel Haley, David Hall, Councillor Anne Handley, Beckie Hart, Phil Jones, Angela Kirkwood, Thomas Martin, Prof Dave Petley, Councillor Mike Ross, and Katy Swaby.

### In attendance

HEY Business, Growth and Skills Hub: Harry Baross (Net Zero Coordinator), Jon Brunton (Growth Hub Manager), Chris Howell (Employment and Skills Manager), Teresa Chalmers (Chief Operating Officer). HCC: Alex Codd (Assistant Director Economic Development and Regeneration), Louise Hawkins (Democratic Services Officer) and Matt Jukes (Chief Executive).

ERYC: Alan Menzies (Chief Executive).

HEY Combined Authority: Mark Rogers (Interim Chief Executive).

Minute	Item	Action By/Deadline
No		
1	APOLOGIES	
	Apologies were received from Stephen Parnaby OBE, .	
2	APPOINTMENT OF DEPUTY CHAIR	
	The Board noted the appointment of David Hall as Deputy Chair of the Board.	
3	MINUTES OF THE MEETING HELD ON 5 <sup>TH</sup> FEBRUARY 2025	
	The Democratic Services Officer submitted, for approval, the minutes of the meeting held on 5 <sup>th</sup> February 2025.	
	<b>Agreed</b> – that the minutes of the meeting held on 5 <sup>th</sup> February 2025 be approved as a true and correct record.	LH
4	OVERVIEW OF PRIORITIES AND STRATEGIES PRESENTATION	
	M. Rogers and A. Codd provided the Board with a presentation which provided the Board with an overview of the Mayor's strategic priorities	

and the progress that had been made in relation to the strategies that the Combined Authority was required to develop.

M. Rogers informed the Board that a Prosperity Strategy was being developed which had seven key areas of interest; that there were cross cutting themes; that the language used within the documents was important; that the recent Government Spending Review had indicated an increase in public spending which included an additional £180m in transport funding for Combined Authorities; that the Mayor would continue to ask Government for more investment in Hull and East Yorkshire; that priorities included a better connected region, digital connectivity, Al investment, investing in young people, and addressing issues within local communities; that the Mayor was very committed to the region and wanted to ensure that there was an appropriate level of engagement with communities, and that a number of key documents would need to be agreed which included the Local Growth Plan and a Transport Strategy.

In relation to the Economic Framework the Board was informed that there were four main ambitions; that transport link and digital connectivity were key; that a consultation on the framework had taken place at the end of 2024; that a Humber Economic Strategy, which had five ambitions, was being developed.

The Board discussed the following matters –

- That there was a lack of reference to net zero within the documents and whether this was due to a change in language;
- That the Combined Authority would not take responsibility for culture and tourism in the region as this was being done by other organisations;
- iii. That the language used in strategies and plans was important to investors;
- iv. That it was felt that there was no need for any additional boards/groups in the region as it was already confusing for Central Government as to who it should consult. It was suggested that there needed to be one voice to represent and promote the region, and
- v. That there was an ambition of the local authorities for collaborative working across the Humber region.

M. Rogers explained that the Board would have a route to provide formal feedback to the Mayor; that the Board would have a key contact officer at the Combined Authority; that there would be a Joint Mayoral Committee across the Humber region; that the significant number of strategies and plans being produced was recognised however sometimes plans were required in order to be able to draw down funding and where possible bureaucracy would be minimised; that ways in which governance could be streamlined would be explored; that there would be a light touch review of the Business and Skills Boards terms of reference, and that the role of

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the Business Board was critical as the voice of business was important in developing the Prosperity Strategy. Agreed a. That the presentations be noted; b. That a briefing note which reflects the comments of the Bard is provided to the Mayor, and c. That members of the Board be asked to provide questions which can be forwarded to the Mayor for a response. MAYORAL RENEWABLE FUND 5 H. Baross presented a presentation which provided the Board with an update on the Great British Energy's Mayoral Renewables Fund. The Board was informed that the report to the Hull and East Yorkshire Combined Authority Executive Board, which had sought authorisation to accept the Great British Energy Mayoral Renewables funding if granted and subsequent allocation to the two Constituent Authorities to carry out the relevant renewable energy regeneration projects, had been agreed; that the local authorities had been asked to put forward renewable energy projects as the Combined Authority did not own any land; that a number of capital projects had been put forward; that the funding would be split 50:50 between Hull and East Riding; that it was expected that the primary allocation of £700,000 would be successful however the supplementary applications were part of a competitive process; that the governance arrangements were being put in place to enable work to take place at pace should the funding applications be successful. A discussion took place and Board members commented on the potential closure of the Vivergo Fuels site at Saltend, Hedon Road. Agreed – a. That the update be noted, and b. That feedback on the potential closure of Vivergo Fuels site is provided to the Board. 6 ADULT SKILLS FUND C. Howell provided the Board with a presentation on the Adult Skills Fund. The Board was informed that the Combined Authority could take ownership of the ASF; that the funding of around £16m would be one of the most significant allocations that the Combined Authority would receive; that there would be some flexibility as to how the funding could be used, and that the ultimate goal of the fund was getting people into work. **Agreed** – that the update be noted.

# J. Brunton provided a presentation which gave an update on the Growth Hub and Business and Economic Intelligence reporting. The Board was informed that the Growth Hub was a one-stop-shop for business support in Hull and East Yorkshire. It was a condition of Growth Hub funding that the regional business board provides strategic oversight and advice on the delivery of the Growth Hub service in-region, to ensure that it was aligned with business and stakeholder needs.

**Agreed** – that the update be noted.



Report to the HEY Business Board

6<sup>th</sup> November 2025

### The HEYCA Gameplan – draft for consultation

### Report of the Interim Chief Executive

### **Report Status:**

This item is not exempt

Therefore exempt reasons are not applicable

This is a non-key decision.

### 1. Purpose of the Report and Summary

1.1 This report accompanies a draft of the HEYCA Gameplan (at Annex A) and provides supporting information.

### 2. Recommendations

- 2.1 The Business Board is asked to:
  - Note the prior endorsement of the the draft HEYCA Gameplan (Annex A) by the HEY CA Board.
  - Note the Portfolios with particular reference to Investment & Skills.
  - Provide reflections, comments and thoughts around the Gameplan to support further development and refinement of the plan.

### 3. Reasons for Recommendations

- 3.1 On adoption, the HEYCA Gameplan will act as the 'keystone' of the Combined authority's strategic framework and will:
  - Describe, to stakeholders and the public the role of the Combined Authority and its organisational priorities, governance arrangements and ways of working;
  - Act as an early statement of what the CA will do, through statements of policy aspiration and initial Portfolio delivery plans that commit to near-term and medium-term actions; and
  - Establish a framework of outcomes across the range of HEYCA activity, against which future progress can be assessed.
- 3.2 At the meeting of the CA Board in September, an undertaking was given to ensure that the Business Board was able to comment on the Gameplan and its development.

### 4. Background

4.1 Following the May election, Mayor Campbell established a framework of strategic priorities for the Combined Authority. These are set out in **appendix 1**, below. The Mayoral priorities informed the design of the Portfolio arrangements adopted by the HEYCA Board in July. The alignment of priorities and Portfolios is shown in the diagram at **appendix 2**.

### 5. **Issues for Consideration**

In many respects, the Gameplan confirms the approach that will be taken to deliver on the devolution deal, which was extensively consulted on, with over 4,000 responses to an online survey and an aligned programme of focus groups to ensure boosted samples for key groups. The Gameplan also makes a series of commitments to working with the residents of Hull and East Yorkshire, including through high levels of transparency, formal consultation on key issues and supporting the voice of children and young people in our engagement processes.

In addition, the Business Board is asked to comment upon the early draft document that accompanies this report for further stakeholder consultation. The draft Gameplan will be shared with partners and presented to key audiences to solicit feedback. The consultation will

also ask stakeholders to identify where there are supporting actions that they could take to deliver on the HEYCA priorities.

Of particular relevance are the Portfolios linked to Good Jobs, which are of relevance to the Business Board strategic role. The Good Jobs priority reflects the two portfolios of Skills (Cllr Ross) and Investment (Cllr Handley).

Within these portfolios are the fundamental elements that will support the creation of a positive environment for private enterprise, investment and business growth.

The Investment Portfolio is concerned ultimately, with supporting the development of the regions infrastructure to support inward investment and business development across Hull & East Yorkshire. This will cover areas linked to the development of public infrastructure projects, as well as set out how the region will support development more generally, linking in with the development of areas such as transport and housing.

The Skills Portfolio covers broadly two areas, supporting those in work, and supporting people outside of the workforce through the development of skills. The fundamental element is around the utilisation of devolved resources such as the Adult Skills Fund, Free Courses for Jobs, and Bootcamps to support the regions economy and underpin the delivery of the upcoming Get Hull & East Yorkshire Working Plan.

### 6. Equalities Impact Information

6.1 An initial Equalities Analysis was presented to the CA Board.

### 7. <u>Legal Implications and Statutory Officer Comments</u>

7.1 There are no legal implications arising out of this report.

### 8. Financial Implications and Statutory Officer comments

8.1 There are no current financial implications arising from the recommendations within this report. Financial implications will arise from future decisions made within the recommended framework, if adopted, which will be guided by statutory officer advice at that time.

### **Contact Officers:**

Deb.Gray@hullandeastyorkshire.gov.uk

### Officer Interests:

None

## **Appendices:**

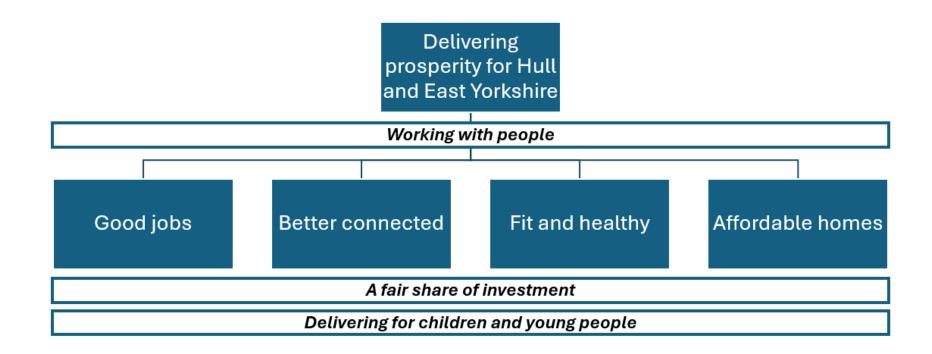
Appendix 1: Mayoral priorities framework

Appendix 2: Mayoral priorities and portfolios

Annex A: HEYCA Gameplan

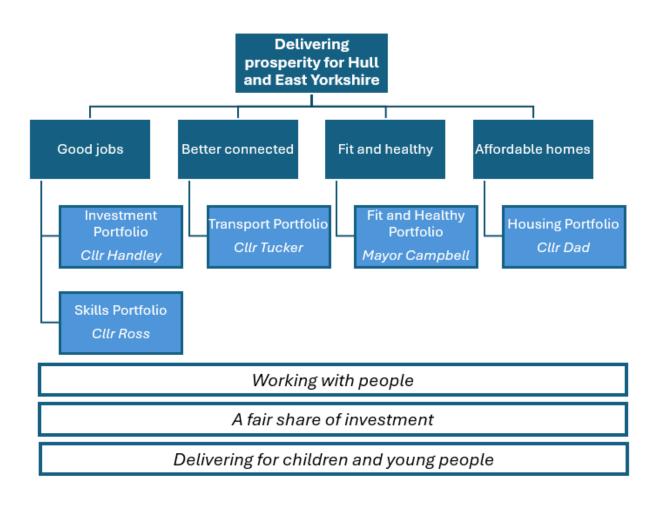
Appendix 1

### **Mayoral priorities framework**



Appendix 2

Mayoral priorities and Portfolios





✓ Good jobs
✓ Better connected
✓ Fit and healthy
✓ Affordable homes

# The HEYCA gameplan – prosperity and opportunity for all

Draft for consultation



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# Section 1: Introduction

This section frames and explains our gameplan. It sets a clear vision of prosperity and opportunity for all. It explains what we mean by this, how we'll work together and what success looks like.



### Mayor's Foreword

It's a privilege to present this plan for Hull and East Yorkshire – a plan grounded in the belief that prosperity should be shared by everyone in our region. From our port city to the towns and villages that span our coastline and countryside, we have a history to be proud of and an opportunity to shape our future. We can build an economy that works for all, while strengthening the communities that make this place unique.

I was born here, and I am proud to be the first elected Mayor of Hull and East Yorkshire. My vision for our region is straightforward. Jobs that match the skills and ambitions of all our people. Better transport links between our communities and the wider country. A healthier region where everyone can live longer, fuller lives. Affordable homes in neighbourhoods people are proud to call home. These are the priorities we need to build on.

No single organisation can make this happen. Let's work together – councils, businesses, public services and, above all, the people who live and work here. If we build on what we are already good at and unlock new opportunities, we can make sure everyone benefits from our growth. By working together, we can create lasting opportunities and prosperity for this generation and the next.

Luke Campbell MBE
Mayor of Hull and East Yorkshire



### **Executive Board introduction**

With confidence, hard work and a warm welcome, Hull and East Yorkshire meets the future head on. We're makers, builders and innovators by nature, whose work reaches far beyond our shores.

Our Humber ports form the UK's busiest trading estuary: a global gateway moving people and products at scale. Pioneers like Amy Johnson and Philip Larkin helped us all see life from a different angle.

Our skills and our spirit are grounded in proud traditions, from generations of hard graft and seafaring talent in our coastal communities; a deep connection to the land that still sustains our place as a national food security asset; and the mix of craft and construction expertise that gifted us the gothic beauty of Beverley Minster.

Those skills and that same spirit are alive today:

- In the blades we build at Alexandra Dock to power our region forward and increase energy security for the whole country
- In the trains we build at Goole Rail Village, delivering over 1,000 skilled jobs and new rolling stock to keep our capital moving
- And in the brighter futures we want to build at Saltend, where investment in hydrogen technologies can drive new technical skills, apprenticeships and early-career roles for young people across our region.

If you look at what's already underway – when we've had to fight to be heard and to get our fair share of investment, just think about what we can achieve now we have the chance to shape our future together.

Leaders across Hull and East Yorkshire have worked for many years to secure devolution and take control of our future. Now our task is clear: to work together and make it a success for every part of our region.

This is our gameplan for delivery. It sets out the first steps our Combined Authority will take and how we will work as one team.

Our vision is simple and ambitious: **Hull and East Yorkshire will be recognised as a region where confidence, connections and creativity bring prosperity and opportunity for all.** 



That means better jobs, homes people can afford, transport that brings people and places together, strong centres in city and towns, and opportunities that keep talent here. It means pride in our places, security for families and confidence for our young people.

We know that success comes when we work together, across political boundaries and local interests, for the benefit of the whole. Each of our roles bring a distinct focus, but is interdependent. Investment fuels growth across sectors. Transport links people and opportunities. Skills, housing and community safety provide the foundations of our shared prosperity. Health and wellbeing give people the chance to participate fully in society. Only by aligning these priorities can we achieve lasting change.

We all recognise that the Combined Authority is new, still building its capacity and ways of working. But we also recognise that people want to understand our priorities and how they can work with us.

This Gameplan is an initial set of commitments made at an early stage and while we are still forming our organisation. This means our plans may need to change and evolve as we go; but it is better to set a clear path at an early stage than wait until we have a perfect plan.

Our early stage of development also makes partnership working crucial. Our councils, businesses, colleges, voluntary groups and residents add strength and depth to our Combined Authority and can help drive real progress. Our role is to bring those voices together and focus our collective efforts.

The truth is we have all the ingredients. World-leading energy industries. Ports that connect us to the world. Universities and colleges that spark innovation and train the next generation. Communities with creativity and determination in equal measure.

This gameplan gives us the framework to focus our efforts, work in partnership and channel our shared belief that Hull and East Yorkshire can stand tall on the national stage.

- Luke Campbell, Mayor of Hull and East Yorkshire
- Cllr Anne Handley, Investment Portfolio Lead and Leader of East Riding Council
- Cllr David Tucker, Transport Portfolio Lead and Deputy Leader of East Riding Council
- Cllr Mike Ross, Skills Portfolio Lead and Leader of Hull City Council
- Cllr Jackie Dad, Housing Portfolio Lead and Deputy Leader of Hull City Council
- Jonathan Evison, Humberside Police and Crime Commissioner
- Jason Speedy, Chair of the HEY Business Board
- Jayne Adamson, Chair of the HEY Skills Board



### Our priorities for Hull and East Yorkshire

This plan is built on the belief that prosperity is shared.

Growth needs to be felt in our everyday lives and in every town, city and village – from the Humber ports to Beverley, Bridlington and the Wolds.

But prosperity in Hull and East Yorkshire is about more than just economic growth. It is about the security, opportunities and connections that people feel.

On taking office, the Mayor established a framework of priorities that form our definition of prosperity and provide the structure for this plan:

- Good jobs that match the skills and ambitions of our people.
- **Better connected:** with transport and digital skills and infrastructure that connect places, reduce isolation, and link us into the wider North.
- **Fit and healthy** lifestyles so people the freedom to participate fully in work, family and their local community.
- Affordable homes in safe neighbourhoods where people are proud to live.

These priorities are underpinned by consistent focus on ensuring we secure **a fair share of investment** for our region, **working** *with* **people** to develop and deliver our plans, and ensuring our **children and young people** have a role in building a future for themselves in our region.

For each of these priorities we have selected a small number of measurable outcomes that describe the things it is most vital that we improve if we're to deliver lasting prosperity.

These are whole-place and whole-population measures of success, and they require coordinated effort across all Combined Authority portfolios. But they also need the active involvement of all public services, of businesses and of local residents and community groups. No one agency can deliver this change alone.



## **HEYCA** outcomes framework

Priority	Lead portfolio	Туре	Indicator	Why this matters for HEY
Good jobs	Investment	Headline	GVA per hour worked	Lift productivity through growth in high value sectors and
				businesses; improvements in infrastructure and skills; and
				broad-based technology adoption.
Good jobs	Investment	Supporting	Gross median weekly pay	Resident-facing prosperity measure that complements
				productivity and tracks rising living standards.
Good jobs	Investment	Supporting	Business births (new enterprise	Signals firm creation linked to investment, Freeport supply
			registrations)	chains and local entrepreneurship.
Good jobs	Skills	Headline	Working-age population qualified	Matches demand in offshore wind, advanced manufacturing
			to at least Level 3	and logistics; levered by devolved skills budgets.
Good jobs	Skills	Supporting	16-17 year-olds NEET	Keeps young people connected to opportunity in coastal,
				rural and urban communities.
Good jobs	Skills	Supporting	Employment rate (16-64)	Whole-economy signal of opportunity creation across city,
				towns and coast.
Better connected	Transport	Headline	Access to services by public	Measure for a mixed urban, rural and coastal geography;
			transport, walking and cycling	focuses on reaching jobs, education and health.
Better connected	Transport	Supporting	Local bus passenger journeys	Practical test of a network that connects settlements and
				opens access to opportunity.
Better connected	Transport	Supporting	Adults who walk or cycle for	Tracks short-trip connectivity and low-cost access for
			travel at least once per week	smaller towns and rural areas.
Better connected	Transport	Supporting	Freight modal shift	Tracks share of total freight movement by each mode (focus
				on road and rail)
Fit and healthy	Fit and healthy	Headline	Healthy life expectancy at birth	Single, public-friendly outcome that captures the health gap
				and progress on prevention.
Fit and healthy	Fit and healthy	Supporting	Slope Index of Inequality in life	Keeps equity central for inner-city, coastal and rural
			expectancy	communities.
Fit and healthy	Fit and healthy	Supporting	Adults physically inactive	Practical prevention lever via active travel, parks and
				community sport.
Affordable homes	Housing	Headline	Affordable homes delivered	Supports city, towns and coast; helps first-time buyers and
			(gross)	retains local talent.
Affordable homes	Housing	Supporting	Net additional dwellings	Core signal of supply.
Affordable homes	Housing	Supporting	Permanent dwellings started	Tracks changes in rate of new building.
Affordable homes	Housing	Supporting	Homes EPC C or above	Links quality to lower energy costs.



### Our place, our economy, our Combined Authority

Hull and East Yorkshire, and the wider Humber region, is a vital trading gateway for the UK.

Our ports link a city that makes and moves things, and a rural and coastal economy that grows and supplies things, with national and international markets.

More than 600,000 people and around 20,000 businesses share one functional economy that ties Hull to Beverley, Bridlington, the Wolds and to ports and communities on both sides of the estuary. We have strong links north to Leeds and York, along the M62 to Manchester and Liverpool, and south to Sheffield, the East Midlands and the wider national economy. These links shape our labour market, supply chains and visitor flows.

Our sector mix is distinctive. Production industries account for a large share of output. Manufacturing contributes strongly, as do engineering, process industries, agri-food, logistics and the port estates that power our gateway role.

Hull and Goole handle significant volumes within a wider Humber complex that is the UK's busiest trading estuary by tonnage, and host designated Humber Freeport tax sites that support investment in energy generation, chemicals, logistics and advanced manufacturing.

Our region is an energy powerhouse, from manufacturing roles in Hull, to chemicals and hydrogen at Saltend, grid and pipeline assets, and a maturing carbon capture proposition that can anchor skilled jobs locally.

Our rural and coastal economy adds range and resilience, from high-performing agriculture and food processing to fisheries and a visitor economy centred on Bridlington and seaside towns.

Our economy trades east to west. The A63 and M62 carry freight from port to market and connect people to higher-skilled work. Spatial priorities focus employment land and investment along this corridor and around key centres.

Although employment has been resilient across our two authorities in recent periods, on pay and productivity we have ground to make up. We need to grow higher-productivity roles in energy, chemicals and health technologies linked to clinical and care innovation, and to improve labour market connectivity.



We also need to support and develop our foundational sectors in-hospitality, tourism, retail and social care; create better pathways for pay and progression; and make sustained progress on a range of economic, social and place outcomes at the same time.

This sort of transformational change takes time and can only be built through constant partnership working that is rooted in place and guided by our strengths.

### What only a Combined Authority can do

Our Combined Authority exists to work across boundaries and in partnership to reflect the scale at which our economy actually functions.

People live in one place and work in another. Freight moves from quayside to corridor to customer. Investment decisions cross council lines. We bring that system together so transport, skills, housing, energy and business support line up. No single organisation can join those pieces as cleanly as a mayoral combined authority with the mandate to act across the footprint.

We give investors and government a single front door. That means one clear proposition, one pipeline, one set of contacts and one timetable, all set in and coordinated with the wider Humber context.

We align land use, enabling infrastructure, skills and supply chains, so projects move from interest to delivery with fewer hand-offs. We secure and join-up funding to de-risk investments, crowd in private capital and anchor good jobs here.

We integrate movement and place. Local transport powers allow us to shape bus reform choices, station improvements and corridor improvements, then sequence them with housing and town-centre renewal. A regional view lets us tackle cross-boundary pinch points and work with other mayors to make sustained improvements across the north.

We lead the labour market. With devolved adult skills funding and a direct commissioning role, we can align provision to real demand in engineering, logistics, construction, health and digital. We convene colleges, the university and employers to design pathways from school to higher technical routes and apprenticeships, and we back in-work progression so people can move up.

We enable the right homes in the right places. A spatial framework at combined authority scale will provide long-term certainty and can link city-centre living, sensitive



town extensions and transport-gateway sites to the locations of future jobs. We bring the capacity at a more strategic level with councils, Homes England and developers to assemble and service sites, test innovative approaches to construction and align funding and financing.

We steward key markets and services. By coordinating with utilities, Network Rail, DfTO, National Highways and the Environment Agency, we can influence the timing of upgrades to support our investment pipeline. We bring the capacity to shape digital connectivity and improve data-sharing so businesses and public services can more easily and safely adopt modern software and AI, and residents can access services and training. Through procurement and commercial practice we will grow local supply chains, set clear expectations on wider value, and manage contracts so delivery stays on track.

We will work closely with the Police and Crime Commissioner (PCC) for Humberside. As a member of the HEYCA Board the PCC provides strong assurance on policing and access to a network of mature partnerships, linking the Combined Authority to our existing Community Safety Partnerships, the Humberside Criminal Justice Board, Humber Violence Prevention Partnership and Safer Roads Humber in ways that will help us act across the whole system. We have set out shared commitments in each of our delivery plans below and will develop working relationships over time that ensure we share evidence, insights and aligned planning and decision making that improves safety, confidence and opportunity across city, towns and coast.

We speak with one voice for our area. The Mayor provides visible leadership and democratic accountability, while our partnerships across the Humber and the wider north lets us act at scale where it's needed. Government expects a strategic partner it can trust with multi-year settlements. A combined authority fills that role and turns national opportunities into local projects people can see.

Above all, the Combined Authority will keep people at the centre. Resident and business voice and open reporting are built into how we work. That combination of scale, powers and public mandate is what makes a combined authority different. It is how we turn our strengths into prosperity and opportunity for all.



# Section 2: the HEYCA Gameplan

This section explains how we will deliver each against each of the mayoral priorities, and where the Leadership Board portfolios make their most direct contribution.

For each priority, we sketch out our context and aspirations, define key measures of success, and set out our first steps for delivery and the major projects we will target over the coming years.



# ✓ Good Jobs

### Context and aspirations

Our economic strengths run from energy generation and advanced manufacturing to digital and creative work, and across a large base of food production, visitor economy and public services. Our production industries already account for a nationally high share of output, reflecting our role in energy, manufacturing and ports.

This mix matters because it gives more residents a route into work and a path to progress. Our task is to turn these strengths into more secure, better paid roles across our city, towns and coast.

Energy and engineering anchor many of the best opportunities. At Alexandra Dock, offshore wind blade production shows how making at scale can lift pay and skills across supply chains. On the Humber, chemicals and energy projects are creating demand for technicians, process operators and engineers, with new apprenticeships and early-career roles for young people. Our ports and Freeport sites strengthen this by drawing in logistics, fabrication and component manufacturing, supported by land and infrastructure along the A63 and M62 corridor.

Digital capability now runs through every sector. Factories use sensors, data and automation to improve quality. Logistics firms optimise routing and warehouse flows. Health and care providers use digital tools to plan services and support people, patients and staff. We will help businesses adopt modern software and AI so they can design better, sell more and run smarter operations. That means practical support for smaller firms, peer learning between employers, and access to the right facilities and kit.

Foundational sectors create a large share of local jobs and deserve the same focus on quality and progression. Our area leads the country in static caravan and lodge manufacturing, which supports design, joinery and supply-chain jobs. Fisheries and the wider agri-food system link farms and food businesses into local and export markets. Retail, social care and public services provide work in every community and can offer real careers with the right training and management pathways. Steadier hours and higher skills are key to better visitor experiences in our tourism and hospitality sectors.



Skills and training turn opportunities into good careers. We will back clear routes from school to higher technical qualifications and apprenticeships, aligned with employer demand and insight into what's needed. This will include support and traineeship pathways for young people leaving school and routes for older people to re-engage in learning pathways to secure jobs. Devolved adult skills and local commissioning will raise attainment and support people to retrain. Colleges, the university and independent providers already offer strong foundations in engineering, energy, health and applied sciences. We will build on this with employers, so courses fit shift patterns and real jobs.

Good jobs here means access to fair pay, security and the chance to progress. They exist in factories and labs, in care settings and in classrooms, on farms and in kitchens, in studios and server rooms, on the quayside and in our town centres.

We will build on our economic strengths – leveraging investment in plant, digital technology and AI, and supporting better transport and strong local training routes. This is our route to a stronger economy and more opportunity for local people - an energy powerhouse for the UK and beyond; a centre of digital and mechanical engineering excellence; a global maritime and logistics gateway; and the place where businesses come to secure quality of life, the space to expand and a seat at the table.

### Tracking our progress

We will work to create more good jobs with government, business leaders, investors, education and training providers and our talented local workforce.

We will know we're succeeding when we see a positive shift in these in these indicators.

Priority	Lead portfolio	Туре	Indicator	Why this matters for HEY
Good jobs	Investment	Headline	GVA per hour worked	Lift productivity through growth in high value sectors and businesses; improvements in infrastructure and skills; and broad-based technology adoption.
Good jobs	Investment	Supporting	Gross median weekly pay	Resident-facing prosperity measure that complements productivity and tracks rising living standards.
Good jobs	Investment	Supporting	Business births (new enterprise registrations)	Signals firm creation linked to Freeport supply chains and local entrepreneurship.
Good jobs	Skills	Headline	Working-age population qualified to at least Level 3	Matches demand in offshore wind, advanced manufacturing and



				logistics; levered by devolved skills budgets.
Good jobs	Skills	Supporting	16-17 year-olds NEET	Keeps young people connected to opportunity in coastal, rural and urban communities.
Good jobs	Skills	Supporting	Employment rate (16-64)	Whole-economy signal of opportunity creation across city, towns and coast.



### Investment Portfolio delivery plan

### **Cllr Anne Handley**

Our Investment portfolio turns our strengths into jobs, productivity and higher wages. It leads our propositions to government and investors, shapes our Investment Framework, and coordinates programmes that unlock sites, infrastructure and growth.

The scope includes inward investment, trade readiness, sector development, the Freeport offer, our capital pipeline, planning facilitation and investor aftercare. It works with Transport, Skills and Housing so land, people and connectivity line up.

### Our first steps will be to -

- Commission an updated regional economic assessment to identify our strengths and areas where more can be done to drive growth and create good jobs.
- Develop a ten-year plan for growth that identifies our top investment opportunities and guides regional prosperity, and work with investors to lever in additional funding wherever possible.
- Create a new Investment Board to advise on how to use Combined Authority resources to best support the highest priority opportunities for growth in the region.
- Become the Accountable Body for the Humber Freeport and work with partners to streamline governance of the Humber to unlock investment and speed up and join up decision making.
- Continue to support businesses with access to effective programmes, such as Made Smarter, and expert advice and action.
- Continue to lobby government for a fair share of national investment in our people, our economy and our infrastructure.
- Attend national and international investment summits, conferences and trade missions, including in partnership with other northern Mayors.
- Prepare a business case for Local Innovation Partnerships funding, working closely with the University of Hull and other Yorkshire Universities.
- Support the Hull and East Yorkshire Local Visitor Economy Partnership.



### The big steps we will take in the coming years are to -

- Identify key growth locations across the region that can provide the focus for sustained investment activity.
- Develop a funding and financing strategy that leverages Combined Authority resources to their fullest effect, working with public, private and institutional investors.

**Working work with the PCC**, we will also support safe town and city centres and a vibrant night-time economy, reducing crime and antisocial behaviour that undermine growth and confidence.



### Skills Portfolio delivery plan

### **Cllr Mike Ross**

Our Skills portfolio will build a talent pipeline that matches our economy. It leads on the devolved Adult Education Budget, works with the Chamber of Commerce to produce improve skills provision in key sectors, and coordinates programmes for young people and adults.

To ensure we deliver on our priority for good jobs, the portfolio will focus on higher technical pathways, apprenticeships, basic and digital skills, and in-work progression.

### Our first steps will be to -

- Prepare and agree a whole-place, whole-system Work and Skills Strategy to set priorities and guide the range of inter-related skills funds and opportunities.
- From March 2026, take on the responsibility for the strategic direction, commissioning and accountability for the Adult Skills Fund, and Free Courses for Jobs. Directing over £16m of funding to transform Adult Skills and training across the region and preparing for the future introduction of the Lifelong Learning Entitlement.
- Work with the Hull and Humber Chamber of Commerce to co-develop a new Local Skills Improvement Plan that is business-led and addresses the skills gaps holding our key sectors back.
- Scope the role that a Good Work Charter could play to support residents with improved employment and training opportunities across our economy.
- Develop our evidence base and data insights using the information from the delivery of the Local Skills Improvement Plan, Adult Skills Fund, Skills Bootcamps, and the Get Britain Working/Connect to Work to shape commissioning decisions and future strategic planning.
- Ensure new employment support programmes are aligned with the wider Work and Skills Strategy and steps to remove barriers to in-work progression; and support the delivery of Connect to Work and the wider development of healthy workplaces in the region.



 Continue lobbying for greater influence on 16-19 education so we can respond to what businesses need and help young people start planning and realising a successful career at the earliest opportunity.

### The big steps we will take in the coming years are to -

- Fully align skills investments and priorities so people in Hull and East Yorkshire benefit from new, higher value jobs through training and in-work progression.
- Continue to make the case for the devolution of 16-18 powers and resources to support our young people into work and careers in the region.
- Design and launch consolidated youth skills, training and careers programme that brings together what is already working with targeted additional provision.

**Working work with the PCC**, we will also develop training and *employment pathways* for people at risk of offending or reoffending, and work to embed cyber security and awareness of online harms within entry-level routes and apprenticeships.



# ✓ Better connected

### Context and aspirations

Being connected will unlock work, learning, healthcare and culture. Our ambition is for clean, inclusive and digitally enabled mobility that makes everyday life simpler and places feel closer together.

Travel patterns will remain similar, with major flows east to west along strategic corridors, through the port estate and along city-to-town routes that link Hull with Beverley, Bridlington, Goole and elsewhere. Rail stations at Hull, Beverley, Goole and Bridlington will continue to connect the region to wider city networks. Buses will carry large numbers in urban areas and provide vital links for towns and villages. Walking and cycling will keep growing for short trips where routes feel direct and safe, supported by secure parking and, where appropriate, convenient charging for e-bikes and other personal light electric vehicles.

Freight will remain central to prosperity. Efficient port access, reliable rail paths and resilient highway links will shape delivery times and business confidence. As energy and manufacturing grow, and visitor numbers increase, dependable connections to centres, employment sites and the coast will become even more important. We will also support improvements that make freight movement cleaner, more efficient and better integrated with ports, railheads and last-mile logistics.

Digital connectivity will sit alongside transport as essential infrastructure. Full-fibre coverage, strong mobile networks and reliable backhaul will support firms that design and trade online and help residents access services, training and flexible work. We will champion digital tools that improve travel, including contactless ticketing, real-time information and journey planning, and data platforms that help plan, time and maintain the network more intelligently.

We will secure investment and work with operators, councils and infrastructure planners to make everyday journeys simpler, faster and more reliable. We will explore innovative services where they add value, including on-demand links for rural and coastal communities, mobility hubs that bring modes together, and safe, convenient options for micromobility. We will consider how new and enhanced light and heavy rail



connections could support growth where evidence shows a strong case, and we will safeguard potential alignments where appropriate.

Our Local Transport Plan will set a clear pipeline that sequences bus, rail and active travel so people feel improvements year by year. It will focus on dependable bus services on priority corridors, simpler and integrated fares, and information that is easy to use. Stations will work as gateways and as interchanges that support growth in surrounding areas. Walking and cycling links will connect homes to schools, colleges, health services and centres through direct routes and safer junctions. We will treat digital connectivity as part of the network, supporting 5G along key corridors and open data so services can respond to demand.

We will make the case for major cross-North enhancements that improve reliability, capacity and journey times on strategic rail and highway corridors linking Hull and the East Riding with Leeds, York, Sheffield, Manchester and beyond. Our asks will be backed by clear economic, social and environmental evidence, including better freight paths to and from the ports.

We will support investment in digital infrastructure to expand full fibre across urban, coastal and rural areas and improve mobile connectivity at known pinch points, including transport corridors and visitor hotspots. We will use data platforms to provide live travel information, guide network planning and target maintenance, and we will support digital skills so residents can confidently use online services and tools at work.

Together these steps will create a connected region. People will reach work, learning and services more easily. Businesses will move goods and welcome visitors with confidence. Digital networks and skills will support every sector. The result will be places that feel closer together and better linked to opportunity across Hull, the East Riding and the wider North.

### Tracking our progress

We will work to improve connectivity with government, transport providers, local councils, business leaders, public services and infrastructure providers.



We will know we're succeeding when we see a positive shift in these in these indicators.

Priority	Lead portfolio	Туре	Indicator	Why this matters for HEY
Better connected	Transport	Headline	Access to services by public transport, walking and cycling	Measure for a mixed urban, rural and coastal geography; focuses on reaching jobs, education and health.
Better connected	Transport	Supporting	Local bus passenger journeys	Practical test of a network that connects settlements and opens access to opportunity.
Better connected	Transport	Supporting	Adults who walk or cycle for travel at least once per week	Tracks short-trip connectivity and low-cost access for smaller towns and rural areas.
Better connected	Transport	Supporting	Freight modal shift	Tracks share of total freight movement by each mode (focus on road and rail)



# Transport portfolio delivery plan

### **Cllr David Tucker**

Our Transport portfolio connects people to work, learning and services, and connects freight and visitors to our places. It leads our Local Transport Plan; bus improvements, rail and station work with partners; active travel; and integration of transport with land use and regeneration.

To ensure we deliver on our priority to be better connected, the portfolio will focus reliability, affordability and accessibility that supports growth.

### Our first steps will be to -

- Publish our Bus Service Improvement Plan and lead the creation of an Enhanced Bus Partnership to deliver noticeable improvements to services across the region.
- Work with our rail operators to highlight and address consistent underperformance and to identify priority improvements for services and stations.
- Lobby to secure investment in rail, including electrification of the Hull to Leeds and Hull to Sheffield lines, and to ensure future programmes take account of the opportunity to deliver earlier impacts by starting the east of the country.
- Provide support to improve community transport, including considering the potential for a targeted seed funding programme.
- Put in place an active travel plan to direct investment to the right locations and in line with our strategic priorities.
- Agreed a Key Route Network that will benefit from Mayoral powers and oversight and put in place a Key Route Network Board to guide its development.
- Secure funding for battery powered buses and charging infrastructure for residents with electric cars, to support quieter roads and cleaner air in our towns and villages.
- Bid for additional funding to ensure everyone in Hull and East Yorkshire has
  access to digital devices, data and connectivity and the skills and confidence to
  use them.



• Play a full role in the regional resilience forum to help respond to prepare for and respond to emergencies and help keep people safe.

# The big steps we will take in the coming years are to -

- Put in place a statutory Local Transport Plan that provides a rich picture of our transport future and can unlock, guide and sequence major investment over the long-term.
- Develop the Combined Authority to become a fully established Transport Authority.
- Move to a simple integrated ticketing offer across operators in Hull and East Yorkshire

We will also work with the PCC on casualty reduction and safety for all road users, and to tackle crime and antisocial behaviour on public transport.



# ✓ Fit and healthy

# Context and aspirations

Good health underpins everything – we need to feel well to work, study, care for family and take part in community life.

We know that health is heavily shaped by place and the pattern of our demographics, with a younger, urban city and an older, rural and coastal county.

Safe streets help children walk to school. Good homes reduce illness and bills. Bus and rail links are needed to access health services, jobs and college. Access to nature – whether that's in parks, at the coast or across the Wolds – supports everyday activity and good mental health.

In Hull, life expectancy and healthy life expectancy are below the England average, with large gaps between the most and least deprived neighbourhoods. Deprivation in innercity neighbourhoods is linked to higher rates of COPD and diabetes and, while smoking has fallen strongly over the last decade, it remains higher than average which drives respiratory disease and earlier ill health.

Our population across the East Riding is older, which brings more dementia, musculoskeletal problems and falls. Longer travel distances – particularly for those living in coastal and rural communities – can also make it harder to access vital services.

Workplaces across the region can influence health through shift patterns and stable employment, and training and environmental measures to address health and safety risks, especially musculoskeletal strain and stress. Culture, sport and heritage groups also act as preventative factors, building social capital and reaching people that formal services often cannot.

Working with our partners in the NHS, councils and across the public, private and third sectors, we will use our increased influence and forthcoming public health duty to firmly put prevention first, and closer to home.



We will strengthen the link between health and work, forging closer links between employers, Jobcentre Plus, the NHS and local authorities and skills providers so residents get timely help that keeps them in work or helps them return sooner. Support will focus on what matters most for attendance and productivity, including mental health, early access to occupational health, and simple workplace adjustments. Employers will have clear routes to advice, and residents will see pathways that connect condition management, training and good jobs.

Sport and physical activity will be part of daily life, and we will back a culture of movement by working with clubs, schools, councils and event organisers so that grassroots sport grows and more fixtures come to our city, towns and coast. Big moments will inspire young people and first-time participants, while better walking, cycling and wheeling links between pitches, parks, shops and schools will make active travel part of everyday life.

We will use our planning powers to ensure developers build healthy places for future generations. New homes and renewals will meet clear standards for warmth and ventilation, and public realm in towns and on the coast will invite people to spend time outdoors.

The Mayor's Community Investment Fund will grow community capacity, and we will work strategically with umbrella agencies and anchor institutions across the region to complement their missions and our vital public services.

We will use data well, working with our NHS and local authority partners to ensure integrated dashboards can track healthy life expectancy, physical activity, smoking prevalence and other practical measures. Over time we will codify our approach into a regional health inequalities strategy that will drive major change to improve peoples' lives and address one of our regions most sustained barriers to growth.

# Tracking our progress

To deliver meaningful and sustained change in population health outcomes we will take a collaborative and movement making approach to our work, in partnership with our local NHS colleagues, local authorities and other public services, employers, training providers and, crucially, the voluntary, community, faith and social enterprise organisations and the people of Hull and East Yorkshire.



We will know we're succeeding when we see a positive shift in these in these indicators.

Priority	Lead portfolio	Туре	Indicator	Why this matters for HEY
Fit and	Fit and	Headline	Healthy life	Single, public-friendly
healthy	healthy		expectancy at birth	outcome that captures the
				health gap and progress on
				prevention.
Fit and	Fit and	Supporting	Slope Index of	Keeps equity central for
healthy	healthy		Inequality in life	inner-city, coastal and rural
			expectancy	communities.
Fit and	Fit and	Supporting	Adults physically	Practical prevention lever via
healthy	healthy		inactive	active travel, parks and community sport.



# Fit and healthy portfolio delivery plan

# Mayor Luke Campbell

Our Fit and Healthy portfolio improves the conditions that allow people to participate in work, education and community life. It focuses on prevention, healthy lifestyles, mental health, healthy ageing, and the links between health, housing, transport and work. This will include working with schools and youth groups to reach children early with positive messages, support and new opportunities.

To ensure we deliver on our priorities we will work with the NHS, public health, local public services, schools, employers and the VCSE to close health gaps and extend healthy life years.

### The first steps we will take are -

- Create a £1m Mayoral Community Investment Fund to support the people of Hull and East Yorkshire.
- Publish a plan for getting more people playing sport and being physically active in our region and attracting more sports and cultural events to our venues.
- Publish and deliver our Get Hull and East Yorkshire working plan to give residents
  the support they need to ensure health is no longer a barrier to work, working
  with our NHS, voluntary and community sector, businesses and public service
  partners.
- Work with our local authorities to design and deliver a new Connect to Work service.
- Support our serving and ex-service members by signing up to the Armed Forces Covenant.
- Help our care experienced children and young people have the best start in life by signing up to the Care Leavers Covenant.
- Design a programme of work to ensures health improvement is considered in everything the Combined Authority does, including taking a lead role on the NHS Integrated Commissioning Board and holding in a major Health Summit to galvanise action and impact.



- Prepare a business case to secure funding from government for a Youth Guarantee Trailblazer to support local young people.
- Prepare a business case to develop a Hull and East Yorkshire Health Innovation Zone that builds on our existing business and academic strengths in advanced wound care, digitally enabled clinical trials and applied digital health/AI.

# The big steps we will take in the coming years are -

 Develop an evidence based regional health inequalities strategy to guide service integration and prevention over the long-term.

We will also work with the PCC to reduce the harms from drug and alcohol use, supporting efforts to tackle drug-related crime to support people, families and communities; and implement whole-system approaches to preventing violence and domestic abuse in line with our forthcoming health improvement duty.



# ✓ Affordable homes

# Context and aspirations

The landscape setting of Hull and East Yorkshire is special. The Wolds, the Humber estuary, river corridors, streams and coastal landscapes give our region a distinctive feel and a rich natural environment. Our homes sit within a landscape that runs from a compact city core to market towns, villages and a long stretch of open coastland and throughout the region green and blue spaces support wildlife, provide places to play, cool our streets in summer and make daily life better. Planning for growth and caring for these assets needs to go hand in hand.

We will set a clear spatial framework that brings certainty to residents, developers and investors. Our new regional plan will show where growth goes first and how it connects to everyday life. Increasing city-centre living in Hull will add homes close to work, culture and transport, and support local businesses. Strategic growth locations will guide public and private investment, help us assemble and service sites, and give developers the confidence to build well and at pace.

We will work to secure funding to enable more brownfield regeneration and to improve the energy performance of older homes, tackling damp and cold, reducing bills and supporting healthy living. We will promote construction innovation and the supply chain opportunities this presents across our manufacturing base.

Alongside this, we will help increase the supply of homes people can afford, working with the councils and registered providers to ensure access to social rent, affordable rent and shared ownership in the locations that need them most. We explore how best to support first time buyers, key workers and community led development where there is local appetite.

In the private rented sector we will work to raise standards and improve security, and we will work with local partners to ensure there is targeted support that prevents homelessness and helps people move on from temporary accommodation. Working with councils, the PCC, landlords and community partners, we will use local insight to develop safe, secure homes and neighbourhoods, and focus on what builds trust, cohesion and pride in every community. Specialist and supported housing for older



residents and people with additional needs will be planned into new neighbourhoods and renewal schemes so that the right home is available at the right time.

We will plan and act at Humber scale where it makes sense, including to ensure long-term resilience and improved management of flood risk and coastal change. The estuary is a single system for environment, energy and trade, and we will take a strategic approach to assessing and managing environmental impacts, so infrastructure, housing and employment land can come forward with certainty while habitats are protected and improved.

Together these choices will create more homes in the right places, closer connections between homes and work, stronger centres, and neighbourhoods that feel part of the landscape they sit in.

# Tracking our progress

We will work with our councils, registered providers, Homes England, responsible landlords, developers and investors, builders, planners, utilities providers and community organisations across Hull and East Yorkshire to increase the supply of affordable homes in places people want to live.

We will know we're succeeding when we see a positive shift in these in these indicators.

Priority	Lead portfolio	Туре	Indicator	Why this matters for HEY
Affordable homes	Housing	Headline	Affordable homes delivered (gross)	Supports city, towns and coast; helps first-time buyers and retains local talent.
Affordable homes	Housing	Supporting	Net additional dwellings	Core signal of supply.
Affordable homes	Housing	Supporting	Permanent dwellings started	Tracks changes in rate of new building.
Affordable homes	Housing	Supporting	Homes EPC C or above	Links quality to lower energy costs.



# Affordable homes portfolio delivery plan

### **Cllr Jackie Dad**

Our Housing portfolio supports growth, renewal and sustainable development. It works with our local authorities to bring forward sites, accelerate affordable homes, support town-centre and coastal regeneration, and improves the quality and energy efficiency of our homes.

To ensure we can deliver priorities it will focus on ensuring that housing is aligned with transport and employment and enables good health and wellbeing.

### The first steps we will take are -

- Make a strategic assessment of our new powers in respect of land assembly, compulsory purchase, development orders, infrastructure levy and the creation of new Mayoral Development Corporations, to determine where these can best help unlock stalled sites, speed up planning consents and get homes built.
- Drive forward the development of new homes on brownfield sites using existing capital resources and make the necessary arrangements to secure devolution of further Brownfield Land Funding in the future years.
- Create a single pipeline of priority housing sites and working with Homes
   England and Registered Providers, publish a housing policy statement and
   establish a Strategic Place Partnership to sequence and govern investment in
   them, and wider housing activity.
- Work with our local authorities and partners to conclude and publish the Hull and East Yorkshire Nature Recovery Strategy.
- Develop a plan to support residents to cut energy bills and ensure their homes are warm and well insulated.
- Convene a regional construction and development industry forum and work with business leaders to hold a regional construction innovation summit in the New Year.
- Working with partners, prepare a business case for investment in a package of measures to tackle homelessness, based on evidence of what has worked locally and in other places.



- Undertake an audit of all publicly owned land in the region and work with partners to unlock the highest priority opportunities.
- Convene partners to ensure action to address flood risk remains a strategic priority and is integrated into investment and delivery plans across all relevant agencies.

## The big steps we will take in the coming years are -

- Prepare a regional Spatial Development Strategy to guide investment across our region, allocating broad areas for housing and employment land growth over the long-term, planning for the necessary infrastructure, protecting nature and addressing flood risk.
- Explore the potential to develop a Housing Investment Fund to leverage Combined Authority resources and align with private and institutional investment funds to unlock the delivery of more homes across the region.

We will also work with the PCC to design out crime in new and renewed neighbourhoods, using hotspot insight to guide investment and regeneration decisions.



# Section 3. How we will deliver

# Working at scale

The Hull and East Yorkshire Combined Authority works as part of a wider Humber system, and with national reach. We will play an active role in regional and national forums that give our area a stronger voice and a clear route to government.

### We will:

- Establish strong joint Humber governance arrangements with local authorities, business leaders and the Greater Lincolnshire County Combined Authority.
- Take full advantage of our membership of the Council of Nations and Regions,
   Council of Mayors, UK Mayors and The Great North to press the case for Hull and
   East Yorkshire.
- Work with Transport for the North and DfT to secure investment in key travel corridors, stations and across our network.
- Where appropriate, share evidence, align pipelines and present joined-up propositions with other Combined Authorities where that is the right spatial scale to secure investment.

# Our approach to investment

A Strategic Investment Framework is being developed to guide choices and sequencing for HEYCA investment funds. The framework will set clear priorities, a single pipeline, and a disciplined approvals route so public money unlocks private capital and delivers results people can see.

Further details will be set out in later drafts of the HEYCA Gameplan.

# Working with the people of Hull and East Yorkshire

Residents will be able to see, understand and influence what we do. We will explain decisions clearly, invite people to shape options early, and report outcomes in ways that build trust.

### We will:

 Work transparently with, open board papers, public questions and regular updates.



- Use simple language and presentations so people can follow projects, give feedback and see "you said, we did."
- Consult formally on key issues, including the development of a number of key strategic plans set out in this Gameplan
- Support citizen and youth voice to shape policy and delivery



✓ Good jobs
✓ Better connected
✓ Fit and healthy
✓ Affordable homes



Report to the Business Board

6 November 2025

**Local Growth Plan Development: Stage 1 Consultation** 

## Report of the Investment Lead

# **Report Status:**

This item is not exempt

Therefore exempt reasons are not applicable

This is a non-key decision.

# 1. Purpose of the Report and Summary

1.1 The paper outlines the overall approach and current activity to developing a Local Growth Plan for Hull & East Yorkshire Combined Authority through an initial stage 1 consultation

# 2. Recommendations

2.1 It is recommended that the Business Board note the contents of the report, comment on the approach outlined and provide any additional comments and views.

# 3. Reasons for Recommendations

3.1 All Mayoral Combined Authorities are required to produce a Local Growth Plan. The Board is requested to approve the approach including the suggested stage 1 consultation in order that this work can progress to necessary timescales.

# 4. **Background**

4.1 The Local Growth Plan (LGP) for Hull & East Yorkshire is a tenyear strategy designed to drive sustainable economic growth by integrating national priorities set out in the National Industrial Strategy with local ambitions identified through the Gameplan and other regional approaches to support investment and development.

It aims to support all sectors through a combination of region-wide business support and targeted initiatives for key sectors and workforce skills. The plan includes an assessment of regional strengths and challenges, sets out growth priorities (including 'big plays' to unlock economic potential) and details an investment and delivery plan.

The LGP will establish ten-year priorities and three-year deliverables, focusing on factors such as business support, entrepreneurship, access to capital, and skills alignment. It is evidence-based, aligned with national guidance, and will involve close partnership with government to agree shared and investment priorities.

# 5. **Issues for Consideration**

To develop an effective Local Growth Plan, there is need to ensure that we can test our initial thinking and approach with key stakeholders and the wider community. This includes sharing our new Regional Economic Assessment which forms a key part of our evidence base and will inform future delivery planning.

The Regional Economic Assessment Stage 1 report is included with this report.

To do this we are proposing that consultation around the Local Growth Plan takes place over two stages:

- Stage 1 Open Consultation which is intended to share our initial thinking around the Local Growth Plan, our research and evidence with stakeholders and allow the regions communities to respond to our overall approach.
- Stage 2 Targeted Consultation focused on working with Stakeholders to refine the draft Local Growth Plan and prioritise resources through the development of the Delivery Plan

The Stage 1 Consultation document is included as Annex A and provides an overall outline of our initial thinking in terms of the development of the Local Growth Plan.

The plan distinguishes between different sectors within the region. This is intended to serve two purposes, the first is to be clear about

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our priorities and approach as a Combined Authority and a region to those sectors which will have significant impact, and the second is (in line with policy guidance) to ensure that we remain aligned with, and able to benefit from, government priorities, including those identified in the National Industrial Strategy.

In addition, the plan will also identify foundational and enabling sectors (such as construction) which are important to the regional economy.

It is worth highlighting that the 'Big Plays' are strategic issues (e.g. Health, Skills, Innovation/Investment and Energy/Production) identified in the Gameplan and more broadly (such as through the Humber Industrial Cluster work) which need to be addressed to unlock our economic potential as a region and would have significant benefits across the entire regional economy.

A final element to highlight is that the regional economic assessment will move into a more detailed review of key sectors and this will include the need to engage directly with businesses within those sectors to understand their growth challenges.

### 5.2 Timeline

The indicative timeline for the development of the Local Growth Plan and the timings around consultation is as follows:

Date/Period	Event/Action	Details
Oct	Stage 1 Consultation Opens	Consultation published on HEYCA Website with a copy of Phase 1 Regional Economic Assessment
Nov/Oct	Stage 1 Consultation undertaken	Phase 2 Regional Economic Analysis Undertaken Investment Pipeline analysis
Jan/Feb 2026	Stage 2 Consultation	Draft LGP published  Phase 2 Regional Economic Assessment Published
March/April 2026	Final LGP Published for approval by CA Board	Strategic Investment pipeline  Delivery Plan

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# 6. **Equalities Impact Information**

An initial Equalities Analysis has been undertaken and included in the pack for the CA Board.

# 7. Options and Risk Assessment

- 7.1 All Mayoral Combined Authorities are required to produce a Local Growth Plan. An early consultation is an appropriate step to mitigate the risk that the subsequent Plan lacks legitimacy and local insight.
- 8. <u>Legal Implications and Statutory Officer Comments</u>
  - 8.1 None at this stage
- 9. <u>Financial Implications and Statutory Officer comments</u>
  - 9.1 No financial implications for the HEYCA MCA at this time.

# **Contact Officers:**

Steve Skelton

# Officer Interests:

None

### Appendices:

Annex A – Local Growth Plan Stage 1 Consultation Document (Draft)

Annex B - Regional Economic Assessment Phase 1 - Full Deck

**Background Documents: None** 

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# **Hull** and **East Yorkshire**Combined Authority

Local Growth Plan
Stage 1 consultation paper



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# 1. Introduction

This consultation paper presents the current context and emerging thinking on the Local Growth Plan (LGP) for Hull and East Yorkshire. It invites residents, businesses, public services, colleges and universities, and the voluntary and community sector to share their views on priorities and proposals. It is being published alongside a summary of the first phase of a new Regional Economic Assessment for Hull and East Yorkshire<sup>1</sup>.

The Local Growth Plan will set a shared direction for investment and economic development in the region. It will help the Combined Authority and its partners make clear choices about where to focus, how to remove barriers to growth, and how to align transport, skills, innovation and place-based investment so that effort adds up to more than the sum of its parts. The process for developing the LGP is set out in the diagram below.



At this stage, this paper proposes a structure and framework for the Local Growth Plan; summarises what the evidence says about the economy today, including setting out proposed leading sectors for growth alongside the role of foundational and enabling sectors; explains the main constraints to tackle; and asks for your views on the best choices we could make together.

We have posed X key questions that we are keen to hear thoughts on over the coming months. To have your say as part of this consultation please complete the survey at [insert link to MS form] **before Wednesday 17 December**.

<sup>&</sup>lt;sup>1</sup> The full data and analysis pack will also be published at www.hullandeastyorkshire.gov.uk



# 2. Hull and East Yorkshire today

Hull and East Yorkshire is home to just over 630,000 people and more than 20,000 businesses. The economy generates more than £15 billion in output each year. Manufacturing contributes a large share of local output, around one fifth of total GVA, which is more than double the national average. The ports of Hull and Goole form part of the wider Humber complex, handling significant volumes of UK trade and linking production in the region to markets at home and abroad.

The area's sector mix reflects real strengths in production and trade. There are strong bases in energy, including offshore wind supply chains and clean energy infrastructure, in advanced and specialist manufacturing, in agri-food and food processing, and in logistics and port-related services. Life sciences has a smaller footprint but is high value and aligned with local research and manufacturing assets.

Challenging indicators remain. Productivity per hour is below the national average. Only around two in five residents hold a higher-level qualification at Level 4 or above compared with nearly one in two nationally. Economic inactivity is elevated and long-term sickness accounts for more than a third of the inactive population. Public transport accessibility is uneven, with many rural and coastal communities falling outside a 45 to 60 minute reach of main employment and learning centres by public transport. The working-age population is projected to decline gradually over the next two decades.

Earnings and occupational structure underline the need to raise job quality and progression. The area has a smaller share of residents in professional and managerial roles and a higher share in elementary and process, plant and machine operative roles. Pay levels are below the national average for both workplace and resident earnings, with differences between Hull and the East Riding reflecting commuting patterns<sup>2</sup>.

This is the context in which we have published the draft HEYCA Gameplan, an overarching strategy to deliver on the Mayor's key priorities: to create good jobs, ensure better connectivity, support communities to be fit and healthy, and build affordable homes.

<sup>&</sup>lt;sup>2</sup> These issues and the associated data are explored in the accompanying evidence pack.



# 3. Our Local Growth Plan

The evidence points to a region with strong assets but lower than expected performance on productivity and wages. The case for change rests on unlocking the value in the production and trade base, supporting innovation and export intensity, widening access to opportunity, and enabling investment in places and infrastructure. Our new Combined Authority will be central to this – providing clearer leadership and the ability to align transport, skills, land use planning and economic investment.

A Local Growth Plan that can realise this potential could lift productivity, help retain and attract talent, and create good jobs in communities across the subregion. To do that, we need a framework that help ensure we prioritise the actions with the biggest payback, that partners work to a single strategy, and that can provide a basis for partnership with Government and investors; this requires accurate, up to date evidence and analysis and clear shared priorities

At this stage we are anticipating a three-part structure to achieve this:

- Where We Start From an analysis of the region's economy, assets and challenges, including a summary of the evidence base.
- Our Plan and Priorities the core of the document, including:
  - A target growth scenario
  - A small number of shared 'big plays' the shifts we need to make to realise our economic potential
  - A sectoral framework and strategies, clearing indicating what we believe are our growth ready sectors and most important enabling and foundational sectors
  - Shared priorities for action with government
- Investment and Delivery Plan the actions, investments and partnerships needed to deliver the Plan and measure impact.



# 4. Potential big plays

The local economy is diverse, but its underlying challenges are consistent and well-evidenced. The area performs below national averages on productivity, pay and qualification levels. Long-term sickness constrains participation, and some communities remain disconnected from opportunity. The industrial base is strong but faces transition pressures as technology and energy systems change. These are structural issues that will not be resolved through a long list of fragmented actions.

We recognise that our challenges are systemic, and that we need an integrated approach that strengthens the foundations of the economy while positioning the region to seize national and global opportunities. Phase 2 of our Regional Economic Assessment will dig deeper into the details of this context.

But at the same time, it's important to set out a concise strategy, because a clear focus helps create traction and align activity. To achieve this, we're considering centring our Local Growth Plan on the following three big plays, each of which represents an area where Hull and East Yorkshire already has genuine comparative advantage, where market and institutional failures are holding back growth, and where the Combined Authority and its partners have the levers to act.

# Big Play 1: Powering the Energy and Production Transition

Hull and East Yorkshire sits at the centre of the UK's energy and manufacturing economy. The Humber is home to major offshore wind operations, emerging hydrogen and carbon-capture projects, and a deep base of energy-intensive industries. Manufacturing accounts for roughly one-fifth of local output - more than twice the national share - and the ports of Hull and Goole handle a significant proportion of UK trade.

The opportunity is to link these strengths more deliberately. By aligning clean energy generation, industrial decarbonisation and port modernisation, the region could become the national hub for the energy transition and for advanced, low-carbon production. This would anchor thousands of high-value jobs and attract long-term investment into local supply chains.

The case for this Big Play rests on three observations from the evidence base:

- Concentration of assets: HEY holds one of the densest clusters of clean-energy and manufacturing assets in the UK.
- Bottlenecks to investment: grid capacity, site readiness and flood risk all constrain delivery.



 Potential for spillovers: improvements in these areas would lift productivity and confidence across the economy.

# Big Play 2: Skills, health and connectivity for growth

A strong economy depends on a healthy, skilled and mobile workforce. The local evidence shows that Hull and East Yorkshire's labour market is smaller and less qualified than the national average. Only around two in five residents hold a higher-level qualification (RQF 4+), compared with nearly one in two nationally. Economic inactivity is high, with long-term sickness the main cause. Many rural and coastal settlements lie beyond a 45–60-minute public-transport reach of major employment and learning centres.

These conditions reinforce one another: health problems reduce participation; limited access to jobs weakens incentive to train or travel; and small labour markets deter investment.

Breaking that cycle is essential if growth is to be both inclusive and sustainable.

The case for this Big Play is therefore rooted in people and connections. Devolution provides the tools to coordinate transport, skills and health interventions locally. A joined-up approach could enlarge the effective labour market, improve participation and productivity, and ensure that the benefits of growth are shared across all communities.

# Big Play 3: Innovation, investment and enterprise

The third Big Play focuses on the conditions that determine how quickly firms can adapt, innovate and grow. Hull and East Yorkshire's business base is resilient but under-capitalised. Fewer local firms report being innovation-active compared with national averages, and the area attracts relatively low volumes of private equity and growth finance. Management and leadership capability varies, and digital adoption remains uneven, particularly among smaller enterprises.

The region's universities, NHS institutions and research assets are important but underconnected to industry. A stronger innovation and finance ecosystem would increase productivity, support diversification, and attract and retain skilled workers.

The three Big Plays are mutually reinforcing. Energy and Production create demand for skills, infrastructure and innovation. Skills, Health and Connectivity expand the capacity of the workforce and ensure that growth benefits people and places across the region. Innovation and Enterprise raise productivity and competitiveness, amplifying the impact of investment in the other two plays.



## **Question 1**

Do you agree that this structure and approach will provide the right framework for Hull and East Yorkshire's Local Growth Plan?

Please tell us whether you think this proposed three-part structure and the use of a small number of 'Big Plays' provides the right balance between detailed evidence and describing a clear plan, or if other elements should be included or emphasised.



# 5. Sectoral framework

# 5.1 Why sector focus matters

The Local Growth Plan aims to identify the parts of Hull and East Yorkshire's economy that have both the greatest potential to grow and the strongest capacity to drive wider benefits raising productivity, creating good jobs, and stimulating innovation across supply chains.

The Combined Authority will therefore adopt a sectoral framework that recognises the different roles that sectors play in the local economy:

- Growth-ready sectors Sectors that are already performing well, with clear strengths, investor demand and innovation potential. These will be prioritised for immediate focus and partnership with Government and industry.
- **Growth-potential sectors** Sectors that show promise but face constraints, for example in skills, infrastructure or market development. These will be supported to strengthen capabilities and move toward growth readiness.
- Foundational and enabling sectors Sectors that underpin economic resilience and social value, including health, care, construction, education, utilities, logistics and retail. These will be prioritised for place-making, employment, and workforce development.

This framework ensures the Plan is both selective and comprehensive: selective in focusing effort where it will make the greatest impact, and comprehensive in recognising the interdependence between sectors and the significance of all parts of the economy.

# 5.2 Growth-Ready Sectors

The evidence identifies six sectors that together account for a large share of output and jobs, and are positioned to deliver higher productivity, export growth and innovation, and are closely aligned with national industrial strategy priorities.

# Agri-food and Agri-tech

Hull and East Yorkshire hosts a complete agri-food supply chain – from primary production and food manufacturing to logistics and retail. The sector supports around 14,000 jobs and contributes strongly to exports. Productivity is below the national average but improving, with innovation opportunities in precision farming, low-carbon food processing and waste-reduction technologies. Agri-tech adoption and local R&D partnerships could unlock major gains in value and sustainability.



# Energy

Hull and East Yorkshire play a vital role in offshore wind, hydrogen and carbon-capture industries, hosting globally significant firms and supply chains. The sector's employment growth and investment potential is unmatched in our region, and its success underpins both manufacturing and port growth. However, growth is constrained by grid capacity, land availability and skilled-labour shortages – issues that will require national partnership to resolve.

# Manufacturing

Manufacturing represents around one-fifth of local GVA – roughly twice the national share. It spans advanced materials, fabricated metals, engineering, chemicals and digital production, forming the backbone of the region's industrial economy. The sector is diverse but united by its dependence on innovation, supply-chain modernisation and skills.

Evidence shows that productivity per worker is above the regional average but below the national level, with high export intensity, particularly in chemicals and engineered products. Significant potential exists to decarbonise and adopt digital manufacturing technologies that could raise output and global competitiveness.

Within the broader manufacturing sector, we also recognise two key industries with particular potential that could benefit from additional focus:

### Defence

Defence is a high-value, highly specialised component of the manufacturing base. It contributes strongly to productivity growth and draws on the region's engineering, materials and systems-integration strengths. The sector's skills profile overlaps with advanced manufacturing and logistics, offering opportunities to transfer innovation, workforce and supplier capabilities into civilian industries. With rising national defence expenditure, the outlook for further investment and export diversification is positive.

### Life Sciences

Life sciences in Hull and East Yorkshire combine pharmaceutical manufacturing, medical technology and health innovation. The sector benefits from proximity to universities, NHS partners and established manufacturing infrastructure, allowing applied research and product development at commercial scale. While small in employment terms, it generates high output per worker and significant spillovers into health and wellbeing outcomes. Growth will depend on nurturing R&D partnerships and access to skilled technical staff.



# Ports and Logistics

Hull and Goole are national gateways handling a significant share of UK trade and energy flows. The sector's strength lies not only in freight movement but in the industrial ecosystems it enables. Modernisation of port estates, improved road and rail access, and digitalisation of logistics operations will be critical to maintaining competitiveness. This sector also provides high volumes of employment in both growth-ready and foundational roles.

# 5.3 A Plan for the Whole Economy

Prosperity in Hull and East Yorkshire also depends on sectors that may not show high productivity growth but are essential for resilience, employment, place-making and quality of life.

Our local growth plan needs to support sectors with clear growth potential, such as digital and creative industries, professional and technical services, and tourism, to overcome barriers in skills, infrastructure and investment readiness. These sectors provide diversification, attract young talent and reinforce the region's attractiveness as a place to live and work.

It will also recognise the role played by foundational and enabling sectors, including health and social care, education, construction, utilities, logistics and retail. These sectors employ the majority of local residents, underpin community wellbeing and provide the workforce, infrastructure and services that enable other industries to grow. Improving job quality, workforce progression and technology adoption in these sectors can raise overall productivity and participation, contributing directly to the Gameplan outcomes of Good Jobs, Better Connected, Fit and Healthy and Affordable Homes.



# **Question 2**

The evidence identifies six sectors with the strongest potential to drive growth in Hull and East Yorkshire: Agri-food and Agri-tech, Energy, Manufacturing (including Defence and Life Sciences), and Ports and Logistics. These sectors show the most positive combination of scale, specialisation and growth momentum, and are closely aligned with national industrial strategy priorities.

Do you agree that these should form the growth-ready sectors for Hull and East Yorkshire? Are there other sectors or sub-sectors you believe are important to include, or aspects of these sectors that deserve more emphasis?

## **Question 3**

Prosperity and growth depend on the strength of the whole economy. The evidence highlights that sectors such as digital and creative, professional and business services, and tourism, show growth potential; and that others, such as health and social care, education, construction, utilities, retail and logistics provide the foundations of our prosperity, employing most local residents and supporting economic resilience.

Which foundational or enabling sectors do you think matter most for Hull and East Yorkshire's long-term success? Where are the biggest risks or opportunities, and how could the Local Growth Plan help improve job quality, productivity or workforce resilience?



# 6. Understanding the constraints to growth

The evidence shows that the barriers to growth in Hull and East Yorkshire are systemic and inter-related. Infrastructure constraints, skills shortages, health inequalities, low business investment and access to finance do not exist in isolation – they reinforce one another. A lack of reliable transport, for example, limits access to training and employment; low participation reduces the labour supply available to growing firms; and low productivity constrains the ability to invest in innovation and better jobs.

For the purposes of consultation and analysis, however, these interconnected issues have been grouped into three broad lenses: place, people and business. This structure helps to distinguish between the physical and environmental conditions that enable growth (*place*), the skills, health and inclusion factors that shape participation (*people*), and the investment, innovation and enterprise capabilities that drive productivity (*business*). We have used this approach for the consultation document as it provides a practical framework for identifying priorities and understanding where coordinated action will have the greatest impact, but it won't necessarily translate to the draft LGP.

While many of these challenges can be addressed locally through better coordination of skills, transport, planning and investment, others sit at different levels of responsibility and influence. Some depend on local collaboration across councils and anchor institutions; others require regional scale or national intervention.

We're particularly interested in identifying which barriers to growth will need partnership with Government to make real progress, as the Local Growth Plan codify a small number of shared priorities with key national department. These might be issues where action on regulation, infrastructure funding, or national policy alignment is essential to unlock local potential.

## Place focused constraints

The evidence shows:

- Sites and premises: a shortage of modern, high-quality floorspace in some locations, and older estates under-perform. Some high-potential sites face limitations such as flood risk, utilities and power capacity or access constraints.
- Transport connectivity: many rural and coastal settlements fall outside a 45 to 60
  minute public transport reach of major jobs and learning centres. This reduces the
  effective size of the labour market and makes recruitment harder for employers.
   Improved frequencies, timed connections and better interchanges on key corridors
  could expand access to opportunity.



- Flood and climate resilience: parts of the area face significant flood risk and coastal change. Adaptation and strategic defences are essential to unlock investment and protect communities.
- Energy capacity and utilities: grid capacity and connection times affect the readiness of sites for energy-intensive investment. Coordinated upgrades could accelerate growth in manufacturing and clean energy.

### **Question 4a**

We would like your views on which place-focused constraints most limit growth, where investment should focus, and which of these issues are most likely to require partnership with Government.

# People focused constraints

The evidence shows:

- Skills: a smaller share of residents hold higher-level qualifications than nationally.
   Employers report persistent shortages in technical and professional roles, including engineering, construction, logistics and health technologies.
- Health and participation: long-term sickness accounts for more than a third of those
  who are economically inactive. Practical support to help people start, stay and
  progress in work could have the largest single impact on productivity and inclusion.
- Demography: the working-age population is projected to decline gradually, with differences between Hull and the East Riding. This reinforces the case for higher participation and retention of graduates.

### **Question 4b**

We would like your views on which people focused constraints most limit growth, where investment should focus, and which of these issues are most likely to require partnership with Government.



# Business focused constraints

### The evidence shows:

- Leadership, innovation and finance: a lower share of firms are innovation-active compared with UK averages. Access to equity and growth finance is thinner than in comparator areas. There is scope to deepen leadership capability, digital adoption and management practice, especially for SMEs and family businesses.
- Premises: many firms report difficulties accessing suitable premises. Availability is
  often constrained by ageing stock, limited options for modern flexible space, and
  infrastructure requirements such as grid capacity and transport access. Addressing
  these issues will be essential to attract investment, enable business expansion, and
  retain growing firms within the region.
- Export readiness: the value of exports relative to total output is lower than in some nearby economies. Targeted support could help firms move into higher-value markets.

# **Question 4c**

We would like your views on which business focused constraints most limit growth, where investment should focus, and which of these issues are most likely to require partnership with Government.



# 7. Working beyond our region

Economic geography does not stop at administrative boundaries. Hull and East Yorkshire's prosperity is closely linked to neighbouring places across the Humber and the wider North.

The region shares critical economic assets with its neighbours, including energy generation and transmission networks, ports and logistics corridors, manufacturing and supply chains, and research and innovation ecosystems. The labour market is also fluid, with people commuting across local authority borders for work, training and leisure, and businesses drawing on suppliers and customers from a wider area.

Working across areas can deliver better outcomes on programmes that rely on shared infrastructure or where scale is essential to attract investment. Examples include energy networks, digital and transport connectivity, housing growth corridors, and innovation assets such as university and NHS research partnerships. Collaboration will be most effective where there is:

The HEYCA Gameplan recognises that many of the region's strengths and challenges are shared across boundaries. Achieving good jobs, better connectivity, fit and healthy communities and building affordable homes, depends on collaboration on infrastructure, investment and workforce planning at a scale larger than any single authority.

The Combined Authority therefore aims to be both a strong voice for Hull and East Yorkshire and a constructive partner within the Humber, the wider Yorkshire and Lincolnshire economies, and the North as a whole.

### **Question 5**

Where do you think joint working across boundaries could add the greatest value for Hull and East Yorkshire? Which issues or opportunities are most likely to require close collaboration with neighbouring regions or with Government to make real progress?



#### 8. Linking growth to the Gameplan outcomes

The draft HEYCA Gameplan defines prosperity in broad terms – not just as higher output or income, but as the ability for people and places across Hull and East Yorkshire to thrive. Prosperity means communities that are economically secure, well connected, healthy, and able to shape their own futures.

The Gameplan sets four long-term outcomes that describe what prosperity looks like locally:

- Good Jobs an economy that provides secure, rewarding work and career progression, underpinned by rising productivity and skills.
- Better Connected places linked by reliable, accessible transport and digital infrastructure, where all communities can access opportunity.
- Fit and Healthy people supported to live well, be active and participate in work and their local community.
- Affordable Homes sufficient, quality housing aligned with economic opportunity, helping to retain and attract talent.

The Local Growth Plan will need to align investment and economic strategy with these wider priorities. But to deliver genuine prosperity the Plan must have both the analytical credibility to inform firm decision making that is grounded in sound evidence and robust economic reasoning, and the broad local legitimacy that comes from reflecting the views, ambitions and values of people, businesses and partners across the region.

This balance matters. A plan that is purely evidence-led may fail to engage those whose participation is essential to deliver it. A plan that is built only on consensus risks losing focus or impact. We need to build and maintain a link between rigorous analysis and shared ownership – using evidence to guide decisions, but also investing in the relationships and communication needed to build a common purpose for growth.

#### **Question 6**

Developing and delivering a Local Growth Plan requires both credible evidence and broad local ownership.

How should Hull and East Yorkshire best balance evidence-based decision-making with the need to build and sustain a wide local coalition for growth? What approaches, forums or ways of working could help ensure that decisions remain both analytically robust and widely supported over time?



#### 9. Next steps and how to get involved

This consultation marks an important moment for Hull and East Yorkshire.

For the first time, through devolution and the creation of our new Combined Authority, we have the opportunity to take control of our own economic future – to set a plan that reflects our strengths, ambitions and potential, rather than relying on decisions made elsewhere.

The Local Growth Plan (LGP) will be the central, shared economic strategy for the region. It will turn the ambition set out in the HEYCA Gameplan into a practical plan of action, defining how we will attract investment, support innovation, and ensure that the benefits of growth reach every community. It represents a key opportunity to align local leadership, business and government around a single, long-term vision for prosperity.

Our vision as a Combined Authority is simple and ambitious: **Hull and East Yorkshire will be** recognised as a region where confidence, connections and creativity bring prosperity and opportunity for all.

The LGP provides the main route to driving the growth we need to achieve this.

The Combined Authority is seeking feedback from residents, businesses, public services, colleges and universities, and community partners to help refine the priorities, challenges and opportunities identified in this consultation. Your insights will help shape how we deliver on the promise of devolution – using our new powers and partnerships to make a measurable difference in people's lives.

Over the coming months, we will:

- Review consultation responses and evidence to test and refine our priorities and "Big Plays".
- Develop the first draft of the Hull and East Yorkshire Local Growth Plan, setting out clear actions, priorities and delivery responsibilities
- Publish the second phase of the Regional Economic Assessment, and
- Continue to work with Government, investors and local partners to identify flagship projects and programmes that can demonstrate early impact.

You can share your views by completing the online consultation survey at [insert link] before Wednesday 17 December 2025.



If you would like to discuss the evidence or submit additional material, please contact [insert contact details].

This is more than just a technical exercise. Together, we can create a plan that delivers growth that works for everyone and lasting confidence in our ability to deliver it.

Your insights will help ensure the Local Growth Plan is both grounded in evidence and shaped by the voices of those who will deliver and benefit from it – providing a strong foundation for Hull and East Yorkshire's shared prosperity over the decade ahead.

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### Economic Evidence Base: Hull and East Yorkshire

**Draft** 



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### Introduction

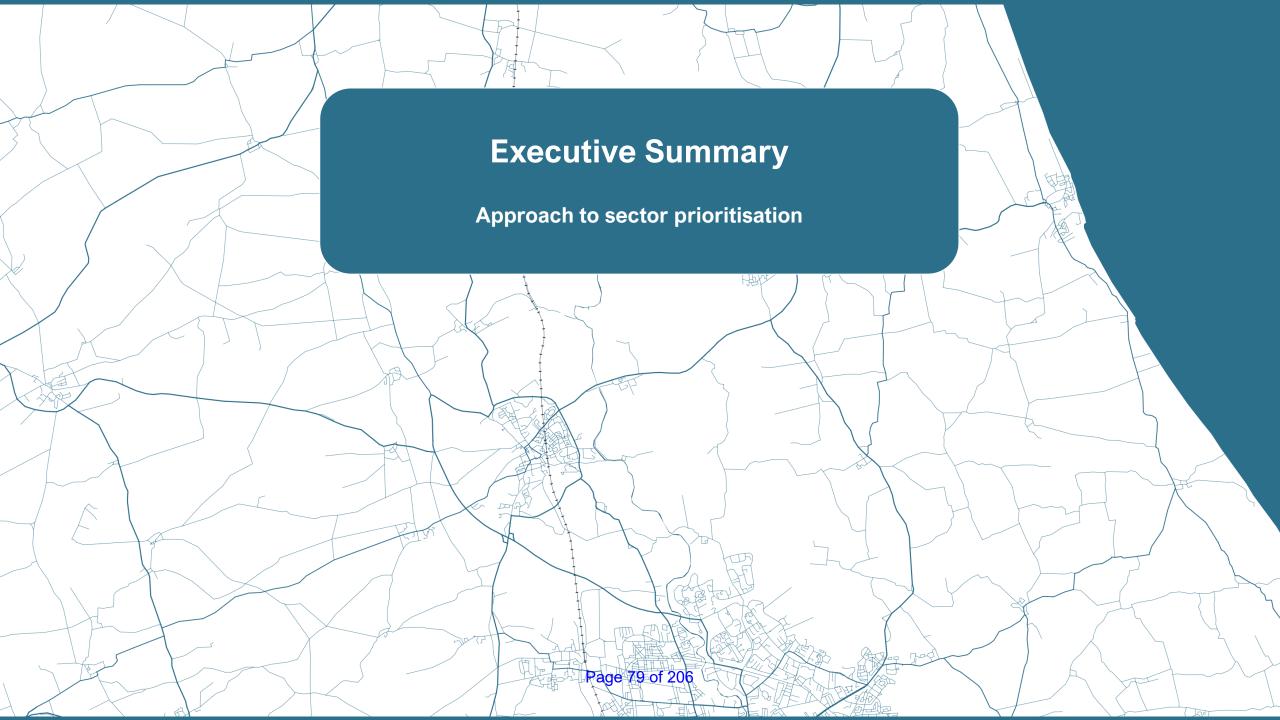
This emerging economic evidence base sets out the findings from the first phase of the regional economic assessment being carried out to support the development of the Local Growth Plan and to provide the combined authority and partners with a robust understanding of the regional economy.

This document brings together the initial findings from two strands of work focused on understanding the overall Hull and East Yorkshire economy and the sector composition and performance. It includes:

- A shortlist of headline metrics providing an overview of the economy as a whole
- Analysis of 7 conditions for growth to begin to understand the constraints on growth in Hull and East Yorkshire
- Analysis of the sectoral composition of the economy and the performance of sectors on different dimensions, as well as a focus on the eight Industrial Strategy sectors in Hull and East Yorkshire
- Initial summaries of the make up and spatial distribution of 5 suggested Local Growth Plan priority sectors

This is the first phase of a longer process to develop a comprehensive regional economic assessment. The next stage of work will focus in greater depth on the priority sectors to understand what the opportunities for growth are in Hull and East Yorkshire and the barriers to achieving growth in key sectors to inform the local growth plan and set the CA on a path to deliver opportunities and prosperity to people across the region.

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### The ask:

To systematically identify and prioritise key or 'driver' sectors within the regional economy to inform the Local **Growth Plan and** linked Investment Priorities.

### The growth mission & sectors

Whilst growth in general is a central objective, both the Industrial Strategy and the duty to produce Local Growth Plans (LGPs) make clear that government is seeking a particular type of growth.

This is growth that is **productive**, **innovation-led and export-oriented** and capable of improving the UK's competitiveness and resilience, rather than simply expanding economic activity in volume terms.

Government's focus is on 'growth-driving sectors', those able to push the productivity frontier, anchor investment and innovation, and deliver spillovers into supply chains and local economies.

This approach is intended to generate transformational growth, bringing positive change to the structure and performance of a place's economy. I.e. Not *just* more of the same.

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### In an LGP this means Govt. ...

is looking for	is not primarily looking for
<b>Productivity-led growth:</b> sectors that can move up the value chain, adopt new technologies, and increase output per worker.	Pure employment expansion in low-productivity activities.
Innovation-led growth: sectors linked to R&D, new technologies, and higher value-added products or services.	Maintenance of existing, low-innovation business models.
<b>Export and tradability:</b> sectors competing in national or global markets, generating external income and investment.	Activities serving only local demand with limited growth spillovers.
Sustainable and resilient growth: sectors aligned with energy resilience or economic security goals.	Short-term or carbon-intensive growth models lacking long-term viability.
Cluster-based and place-specific growth: building on distinctive local strengths and assets.	Generic sector support without regard to local comparative advantage.
Strategic growth: sectors that strengthen supply chains, drive technological diffusion, and enhance national missions.	Fragmented or defensive support for declining sectors.



### So, how should sectors be prioritised?

Not all sectors are positioned equally to deliver growth of the type and pace government is currently seeking. The timing and trajectory of sectors therefore matter as much as their long-term potential. Broadly, there are two types:

#### 1. Sectors showing positive growth momentum now.

These are sectors already on an upward trajectory, where market demand, investment, and innovation indicators suggest nearterm growth potential.

They are likely to respond quickly to targeted intervention and can deliver early, visible outcomes in productivity, employment, and value creation.

These are the priority sectors to put forward now as 'growth-driving' within the Local Growth Plan.

#### 2. Sectors with latent or constrained growth potential.

These sectors may remain important to the local economy, but are not currently positioned to drive the kind of frontier growth envisaged by government.

They may face structural, skills, infrastructure or market barriers that must be addressed before generating transformative growth.

These sectors warrant targeted development or capacity-building interventions, preparing them for future rounds of growth prioritisation.

Sector prioritisation is therefore not a process of selection and exclusion, but of staging and readiness.

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# The role of foundational sectors

Alongside the growth-ready and growth opportunity sectors, there are also foundational sectors, which may not be the leading drivers of the type of high-productivity, innovation-led growth sought by government, but which nonetheless play a vital role in the functioning and resilience of the local economy.

These sectors include activities that provide the essential infrastructure, services, and workforce based upon which other economic activity depends. For example, health and social care, construction, utilities, education, and core business services.

While these sectors may not be presented as 'growth-driving' in the national policy sense, they remain integral to the overall economic strategy of a place.

The task for the Local Growth Plan is therefore to ensure that foundational and enabling sectors are strengthened and modernised, supporting higher-quality employment and efficiency improvements, and maintaining the infrastructure for growth that allows the priority sectors to succeed.

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# This leads to a growth readiness framework with three types of sectors...

Category	Current Trajectory	Growth Readiness	Nature of Opportunity	Indicative Type of Intervention	Role in LGP?
1. Growth Ready	Positive and strengthening: clear signals of demand, investment, innovation, and productivity growth.	High	Sectors already showing momentum and capacity to respond rapidly to policy or investment support.	<ul> <li>Targeted investment &amp; growth acceleration</li> <li>Skills pipeline alignment</li> <li>Cluster development</li> <li>Trade &amp; innovation promotion</li> </ul>	Core - feature prominently in the Local Growth Plan as growth-driving and aligned with national priorities.
2. Growth Potential	Stable or mixed performance: local presence or strengths exist, but current growth indicators are weaker	Medium	Sectors with underlying capability but facing barriers (skills, infrastructure, market access, coordination).	<ul> <li>Capability-building &amp; productivity support</li> <li>Infrastructure / site readiness</li> <li>Skills and supply chain interventions</li> <li>Innovation diffusion / market development</li> </ul>	Development track - build conditions now so they can feature in future growth cycles and later in the LGP.
3. Foundational	Steady: mature and often low- growth but economically and socially vital.	Variable	Sectors provide employment, services, and system resilience; enable growth in other sectors.	<ul> <li>Quality and productivity improvement</li> <li>Workforce progression</li> <li>Digital and energy transition</li> <li>Service innovation</li> </ul>	Underpinning - integral to inclusion and resilience, but not positioned as nearterm growth drivers.

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# ... with a set of features we can observe ...

# Growth Ready

- Strong current growth momentum.
- · Clear alignment with national priorities.
- Demonstrable *near-term* ability to deliver high-value growth.

## Growth Potential

- Local strength, but under-performing or under-realised growth.
- Barriers in skills, infrastructure, productivity or market access.
- Medium-term potential to become growth-driving once constraints are addressed

### Foundational

- Core parts of the local economy
- Provide employment, essential services, and system resilience.
- Unlikely to become frontier "growth-driving" sectors, but critical to overall economic health.

# ... consistently and comparatively across all sectors to understand growth dynamics.

Indicator	Growth-Ready	Growth Potential	Foundational
Size	Usually medium to large employment base, but not essential if other significant local assets are present.	Maybe small to medium in scale but strategically important.	Typically, large employment sectors underpinning local labour markets
Value (GVA / Productivity)	<ul><li>High and/or rising productivity levels.</li><li>Strong GVA contribution per worker.</li></ul>	Moderate productivity, below others but improvable.	Lower (but stable) productivity, reflecting service or social value rather than tradable output.
Specialism (LQ)	<ul> <li>High specialism indicating strong comparative advantage or cluster presence.</li> <li>Established local capability or asset base.</li> </ul>	Emerging specialism presence, but not yet distinct	Ubiquitous activity, essential to place functioning but not unique.
<b>Growth Trends</b>	Positive and strengthening trend across employment, business counts and productivity.	Mixed or moderate trends – static or low growth.	Likely flat, with stable demand, essential service provision

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The Sector Growth Index aggregates five-year changes to employment, business counts, GVA, productivity and concentration (Location Quotients for employment and businesses) to assess how Hull and East Yorkshire's sectors changed between 2018 and 2023.

#### For each growth measure:

Condition	Score
Growing and faster than GB	1.5
Growing and equivalent to GB	1.0
Growing but slower than GB; or Static but GB declining	0.5
Static	0.0
Static but GB growing; or Declining but slower than GB	-0.5
Declining equivalent to GB	-1.0
Declining and faster than GB	-1.5

# A systematic analysis to identify *Growth Ready* sectors

The Sector Growth Index analyses whether a sector is seeing significant growth (>2% Compound Annual Growth Rate - CAGR) in any of employment, business counts, GVA and productivity (GVA per job) and considers the level of growth versus national trends. If the sector is growing significantly faster than the GB average, it gets a higher score.

The maximum score possible is 7, meaning that a sector has seen growth across all measures, each of which is also growing faster than nationally. -7 is the lowest possible score, reflecting a decline across all measures.

Bespoke sector definitions have been constructed by classifying 5-digit SIC codes into 26 sector groups, reflecting the full economic picture in HEYCA. The selection of sectors includes foundational sectors and some specific sectors relevant to Hull and East Yorkshire's economy.

All sectors analysed are mutually exclusive, meaning there is no crossover, and add up to total employment in the region. For example, manufacturing activities within agrifood, clean energy and defence are excluded from the manufacturing definition, despite still being in the same broad industry group previously analysed.

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### Hull and East Yorkshire's headline sector analysis...

Sector grouping	Employment	Businesses	GVA (millions)	Productivity	Average concentration
Retail & Wholesale	37,935	3,045	£1,660	£43,755	1.06
Health and Social Care	36,985	775	£1,354	£36,609	0.98
Professional Business Services	25,450	2,505	£1,276	£50,129	0.78
Leisure & Hospitality	24,585	1,975	£638	£25,950	1.03
Education	23,325	295	£975	£41,779	0.95
Manufacturing	16,825	885	£1,513	£89,918	1.81
Agri-Food	16,790	1,935	£903	£53,761	2.04
Construction	15,515	3,010	£1,003	£64,647	1.12
Public Administration	13,910	125	£852	£61,251	1.64
Other Services	10,360	1,360	£352	£33,995	0.90
Digital and Technologies	7,825	1,160	£443	£56,657	0.61
Advanced Manufacturing	7,720	195	£632	£81,909	2.13
Ports and Logistics	6,610	725	£300	£45,349	1.48
Other Transport activities	6,455	430	£279	£43,298	0.83
Real Estate	3,485	745	£1,914	£549,211	0.75
Utilities	2,930	130	£326	£111,301	1.47
Financial Services	2,565	315	£264	£102,924	0.51
Life Sciences	1,930	20	£291	£150,587	1.27
Creative Industries	1,855	380	£89	£48,095	0.49
Digital and Creative	1,845	195	£105	£57,035	0.58
Clean Energy	1,535	60	£117	£76,310	1.25
Fossil Fuels	1,135	15	£73	£64,439	1.03
Digital Manufacturing	525	20	£35	£66,294	0.53
Mining	250	5	£16	£63,948	1.54
Defence	185	5	£13	£70,352	16.62
Total	268,530	20,305	£15,400	£57,400	8 of 20 <b>5</b>

This table summarises the data produced for each sector at a static level in 2023. The sectors are colour-coded from most (green) to least (red).

As expected, the top employing sectors are more likely to have higher business counts and GVA. However, disparities exist, such as public administration, health, and education, which have high employment but low business counts, likely due to large employers such as the NHS. The largest employing sectors in Hull and East Yorkshire have some of the lowest productivity levels, which brings down the average.

Some correlations can be identified between the relative indicators. Though smaller in size, some of the most productive sectors in Hull and East Yorkshire also have a high business and employment concentration. The most productive sector is life sciences, with a GVA per job of £150,000, but it also has around 27% greater concentration of businesses and employment than Great Britain. Six of the seven most productive sectors have an average concentration of 1.25 or more.

# ...shows a mixed growth story – very few sectors are showing strong growth on all metrics.

Sector grouping	Employment growth	Business growth	GVA growth	Productivity growth	Concentration change
Retail & Wholesale	0.0%	0.7%	0.9%	0.9%	2.3%
Health and Social Care	1.5%	-0.6%	-1.9%	-3.4%	-2.4%
Professional Business Services	-1.4%	-1.0%	0.2%	1.6%	-5.5%
Leisure & Hospitality	0.9%	1.9%	3.0%	2.0%	-3.7%
Education	0.8%	-0.7%	3.3%	2.4%	-3.0%
Manufacturing	-2.2%	1.0%	1.1%	3.4%	1.0%
Agri-Food	2.8%	-1.7%	3.3%	0.5%	4.7%
Construction	6.9%	2.2%	5.9%	-1.0%	14.3%
Public Administration	0.1%	0.0%	1.2%	1.1%	-8.6%
Other Services	1.2%	1.7%	4.9%	3.6%	0.7%
Digital and Technologies	-1.3%	-2.3%	7.5%	8.9%	0.7%
Advanced Manufacturing	-0.5%	4.0%	-1.7%	-1.2%	13.7%
Ports and Logistics	1.1%	1.3%	-0.8%	-1.9%	-2.3%
Other Transport activities	1.2%	2.5%	-2.8%	-3.9%	-6.5%
Real Estate	-1.7%	2.1%	1.2%	3.0%	-11.0%
Utilities	0.6%	6.5%	-4.4%	-5.0%	5.8%
Financial Services	2.3%	0.6%	-0.3%	-2.6%	3.5%
Life Sciences	-0.7%	-10.6%	-0.2%	0.5%	-32.8%
Creative Industries	-2.0%	1.7%	1.1%	3.2%	-4.4%
Digital and Creative	-6.3%	-1.0%	-7.9%	-1.7%	-25.1%
Clean Energy	5.0%	3.7%	5.2%	0.2%	20.4%
Fossil Fuels	2.4%	-5.6%	5.5%	3.0%	9.6%
Digital Manufacturing	3.6%	-4.4%	1.0%	-2.5%	-0.6%
Mining	0.8%	-12.9%	7.0%	6.2%	-39.0%
Defence	2.9%	0.0%	4.9%	1.9%	23.1%
Total	0.60%	0.50%	1.09%	0. <u>49%</u>	of 20%

This table shows the compound annual growth rates for each metric over five years (2018-2023). The five-year total change in average concentration calculates the growth in average concentration.

The sectors experiencing the strongest growth in terms of size are construction, utilities, and clean energy, with construction showing a strong annualised growth in employment, and utilities in businesses.

In contrast, clean energy has a strong annualised growth in both. In terms of value, mining and digital technologies see a substantial productivity growth in five years, despite declining size.

Only a few sectors see growth in most indicators. The only sectors that have seen significant growth in three or more indicators are construction, defence and both clean and fossil fuel energy.

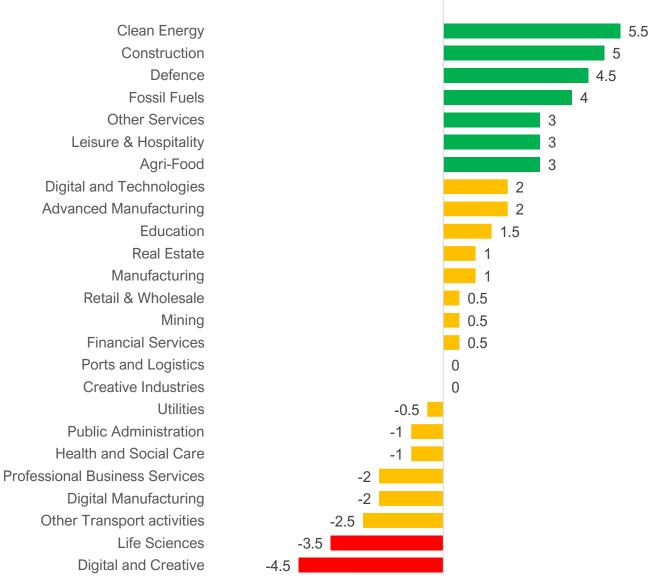
Due to varying growth rates across Hull and East Yorkshire's sectors when applying different measures, the following slide shows the growth index, aggregating all growth rates into a single score.

The index scores show that growth is occurring across a number of sectors, decline concentrated in only a few, and the majority remaining broadly static.

This indicates that the local challenge is not primarily about arresting widespread decline or 'swimming against a tide'.

Instead, the task is about creating the current: putting in place the conditions, investments, and coordination that can amplify existing momentum and generate stronger, self-sustaining growth flows across the economy.

#### **Growth Index Score**



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Source: ONS, Business Register and Employment Survey (BRES), 2023; ONS, UK Business Counts, 2023; ONS, Regional gross value added (balanced) by industry: all ITL regions, 2023

# Growth ready sectors

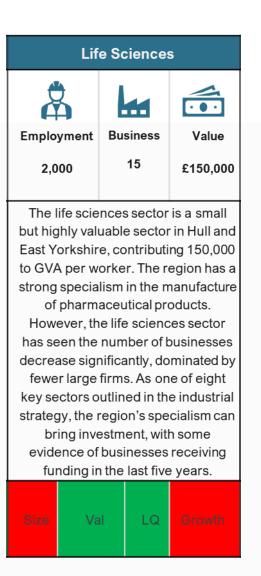
Showing a combination of strengths across size, value, specialisation and growth dynamics, the analysis points to these four sectors as those showing most growth readiness.

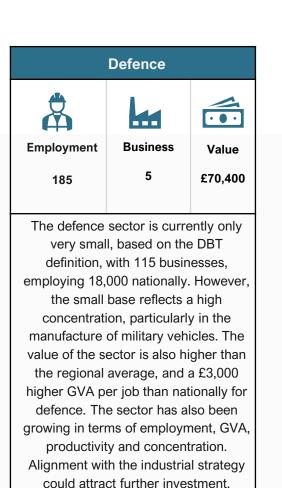
Agri-fo	Agri-food & Agri-tech		Energy			Manufacturing		Port	and Logist	ics	
\$	44			44	• • •	<b>A L</b>			44	•••	
Employment	Business	Value	Employment	Business	Value	Employment	Business	Value	Employment	Business	Value
16,800	1,900	£53,800	2,700	75	£76,300	25,000	1,100	£87,000	6,600	725	£45,300
manufac productivity averages, strong, parti and GVA. TI from geograp	also translated in, with more ation of emploan nationally ons exist across chain, especturing. The sign is equivalent but growth hocularly to employ and access through the	es to a high than twice oyment and v. Significant oss the full cially ector's to national as been aployment o benefits ss to global	contributing r than other s has a high cor being home driving clust Saltend Cher clean energ nationally sig investment. I growth, seein	is highly promore to GVA ectors. The sacentration in the to key infrager formation micals Park. By places the prificant and this also show g positive granultiple means	per worker sector also in the region, structures such as at Strength in region as can lead to wing strong owth trends	accounting employmer compared to also more v Yorkshire th high GVA centred ar sectors, with a showing sp growth tre advanced ma priority, ther	forkshire's e for a high shat, businesses nationally. Taluable in Huan other regiper job. Active ound one or a broad range pecialisms and ends. As defendents are strong inities in the second one second one or a broad range pecialisms and ends. As defendents are strong inities in the second one second one or a strong and a strong inities in the second or a strong inities in the second or a strong inities in the second or a strong or a	conomy, are of total and GVA he sector is Il and East ions, with a vity is not two sub- of activities d varying ence and re a national investment	logistics. The of the H specialisms strong opport Though less sectors, it is r billions of pou imports pas annually, des	e advantage in geographical umber and refunction tunity to grow a productive thationally sign ands worth of sing through monstrating the cent years, so support the second support suppo	n ports and al advantage egional provides a this sector. than other nificant, with exports and Hull's port the national as been so there is a

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# Growth ready sectors

Though very small in size, the Life Sciences and Defence sectors also meet some of the growth readiness conditions. Either growth trajectory and specialisation, in the case of Defence, or value and concentration in Life Sciences. Activities in both fall within the wider manufacturing sector.





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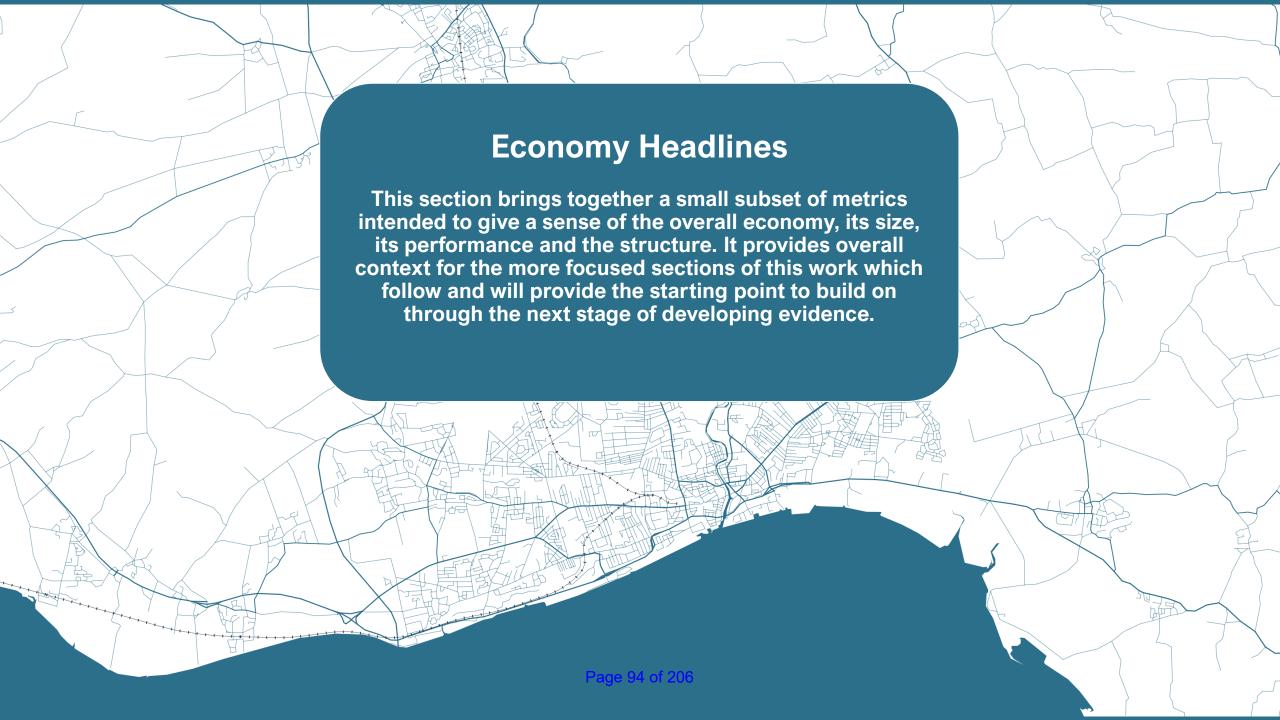
### **Moving forward**

Data indicates the most positive combination of size, concentration and growth momentum *now* in Agri-Food & Agri-Tech, Energy, Manufacturing and Port & Logistics, and whilst Life Sciences and Defence also 'rise to the top' these can be seen as sub-sectors within manufacturing. As such we recommend the next step should delve more deeply into each of these four as *Growth Ready* sectors to produce sector-specific evidence and insight to inform the development of the Local Growth Plan and related investment planning, including greater specificity on sub-sector specialisms.

The analysis also highlights that knowledge-based sectors, including professional, scientific, and technical services, along with creative and digital industries, are either static in growth or very limited in their local concentration and distinctiveness. This represents a significant structural challenge for the future transformation of the Hull and East Yorkshire economy. In much of the UK, these sectors and the so-called 'laptop jobs' (encompassing knowledge-intensive and digitally enabled activities) they bring form a critical component of modern, resilient economies. They drive innovation, productivity, and higher-value employment, while underpinning the competitiveness of manufacturing, public services, and the wider business base.

In Hull and East Yorkshire, however, these sectors are under-represented and under-developed, with far less depth than would be expected in a modern, diversified economy – particularly in a city. Their limited scale and slow growth risk becoming a binding constraint on future productivity and value creation, potentially limiting the region's ability to capture the benefits of technological and service-led transformation. Given their strategic importance, it is recommended that the Combined Authority undertakes a targeted deep-dive into these activities, cutting across knowledge-intensive professional services, creative industries, and digital technologies, to understand the barriers to growth and the interventions required to build greater capacity and capability in this area.

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### A small region

The smallest of the MCAs in England in population terms Hull and East Yorkshire's economic output is around one tenth of the regional total.

While low in national terms, productivity performance is broadly in line with the regional average.

However, median wages are lower and GVA per capita - a broad measure of the overall prosperity of a place - is significantly lower than the regional average.

The economic activity rate is higher than the regional average (and the national average of 75.4), which is due to a combination of a higher percentage in employment, and a higher unemployment rate.

Among those who are inactive there is a higher share inactive due to long term illness (over one third), with fewer students as a share of this cohort.

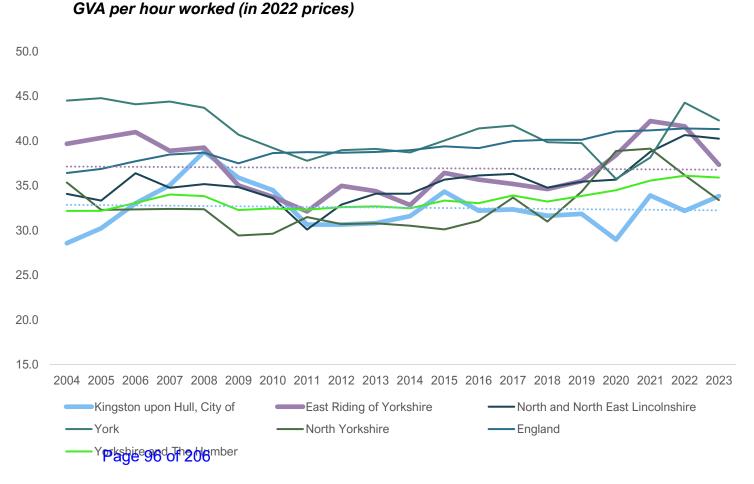
	Hull and East Yorkshire	Greater Lincolnshire	York and North Yorkshire	Tees Valley	Yorkshire and the Humber
Total GVA	£15,446	£26,937	£26,104	£15,486	£150,896
Population	631,285	1,120,749	844,571	712,858	5,672,962
GVA per Capita	£24,468	£24,035	£30,908	£21,724	£26,599
GVA per hour worked	£35.7	£35.5	£35.6	£34.8	£35.9
Median Earnings (workplace)	£580.5	£579.1	£575.0	£584.5	£588.1
Economic Activity rate	80.2%	75.2%	80.0%	75.1%	76.0%
Unemployment Rate	4.8%	3.4%	1.7%	4.3%	3.3%

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### Productivity growth performance is stagnant

Measured by GVA per hour worked, productivity in Hull has been broadly stagnant since 2010, while East Riding has seen a moderate positive increase over this period, likely exacerbating inequalities within the region.

Over most of the last 20 years productivity has been higher in East Riding than Hull, a reversal of the typical trend across MCAs where urban centres drive higher value activity.



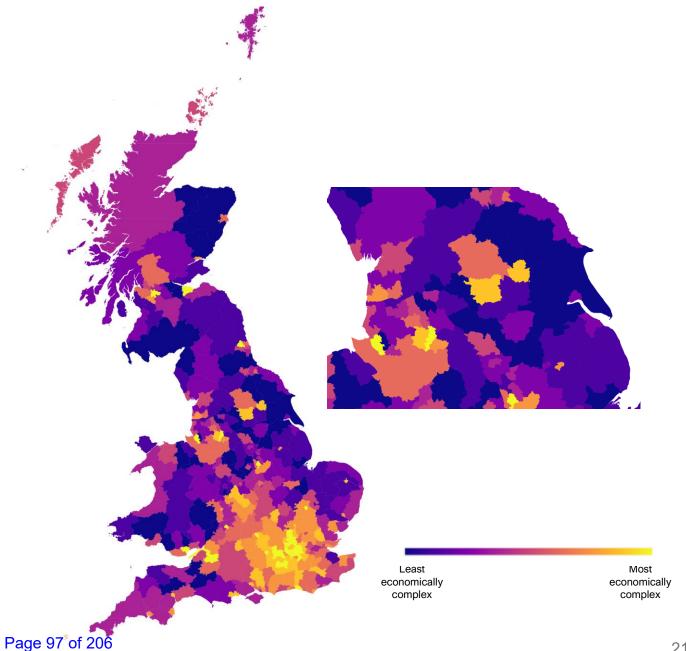
Source: ONS Regional GVA

### The economy is less diverse than other parts of the country

Part of the productivity challenge may be due to the mix of goods and services being produced in the region.

Economic complexity measures the productive capabilities of an economy, with a higher ranking on the index meaning that a place is producing a wider range of products and services. The economic complexity of a place is a way to understand the knowledge embedded in a place and tends to be highly correlated with other measures of economic success including productivity, growth. It also shows a strong negative correlation with income inequality (meaning places with a higher economic complexity ranking tend to have lower income inequality).

Hull and Riding both rank very low among GB local authorities, indicating that there is less capacity in the economy to produce a wide range of products and services compared to other places, and that their specialisms are in sectors which are less specialised or niche on the whole.



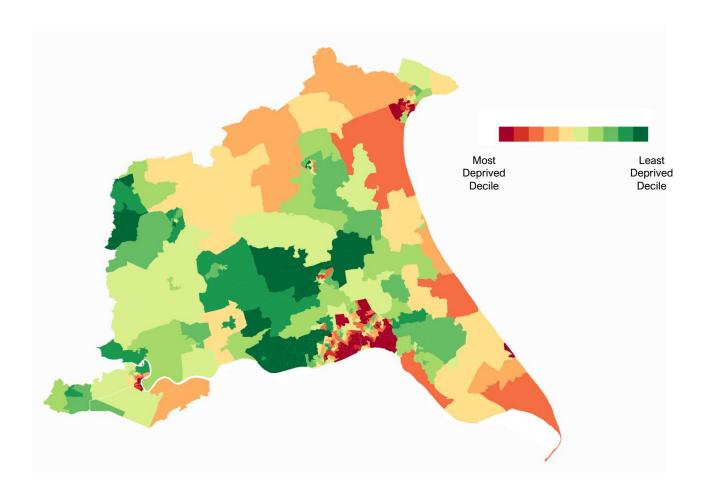
Source: Metro Dynamics analysis of BRES (2023)

### Deprivation data highlights pronounced inequalities

Along with differences in productivity performance, deprivation data shows marked inequalities within the region.

In the 2019 Indices of Multiple Deprivation, Hull was ranked as the 4<sup>th</sup> most deprived local authority in England with 54% of LSOAs in Hull among the most deprived 20% in England (and 45% are in the most deprived 10%).

East Riding is the 189<sup>th</sup> most deprived local authority, with 6% of LSOAs in the most deprived 10% nationally. Within the authority, deprivation is greatest along the coast, to the North and around the larger urban centres. However, there are also areas of very low deprivation, with a fifth of the LSOA in the least deprived 10% nationally.



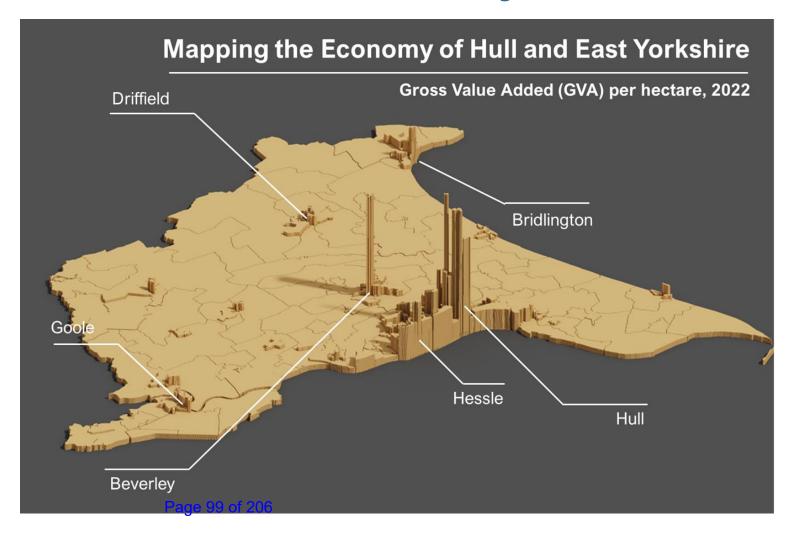
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### Hull has the most intensive areas of activity

While it is lower in productivity and faces major challenges with deprivation, Hull is the economic centre of the region.

The map on the right shows the region's economic geography. The height of the polygons visualised the GVA per hectare, showing the small areas where the most economic output was produced in 2022.

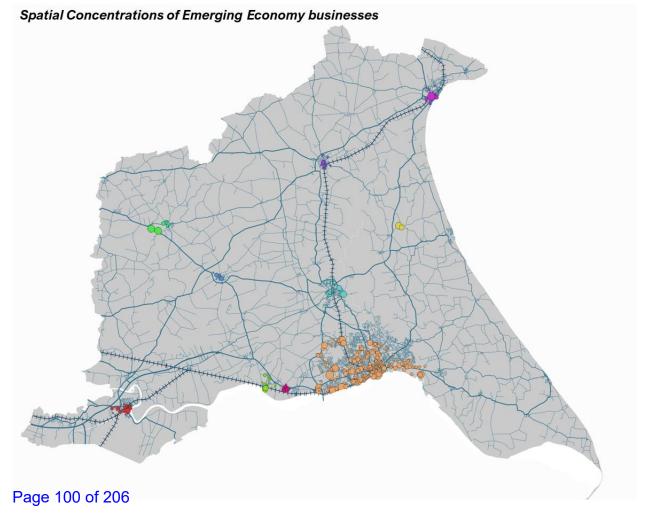
We can see the dominance of the city in terms of the volume of GVA produced clearly, both in the city centre and along the riverfront, as well as strong centres of activity in Beverley and Bridlington.



## **Emerging economy businesses are concentrated in town centres**

This map shows the spatial clusters of businesses which have been assigned a Real Time Industrial Classification by Data City, indicating that their activities place them in new or emerging parts of the economy not well captured by Standard Industrial Classification codes developed in 2007.

These businesses follow, as you would expect, a very similar spatial pattern to the small area GVA.



#### **Conditions for Growth**

This section contains analysis focused on understanding the conditions for Growth in the region, testing whether the necessary factors are present to help us understand what the barriers to growth are, and what this means for the Local Growth Plan. The analysis is at the economywide level, but in the second phase of work we will use this framework to understand the conditions for and barriers to sector growth.

### Introduction

To assess the performance and resilience of the Hull and East Yorkshire economy, analysis is framed around seven key growth constraints. The constraints to growth are critical conditions that underpin economic competitiveness, inclusivity, and long-term productivity, which help to identify strengths and barriers to growth.

- Commercial space: Adequate and modern commercial space is essential to attract and retain businesses, enable expansion, and support inward investment. This examines the availability, quality, and resilience of employment land and premises.
- Labour market: A strong labour market underpins productivity, while mismatches in skills or low participation limit growth and opportunity. This examines the size, skills, and participation of the working-age population.
- **Export:** Exporting businesses tend to be more innovative, competitive, and growth-oriented, making this a key driver of economic strength. This understand exporting, this assesses the proportion of firms engaged in exporting and the value of exports.
- **Investment:** Investment fuels growth by enabling firms to innovate, scale, and modernise. This considers capital investment, including business investment and equity finance.
- **Transport:** Connectivity shapes how people access opportunities and how businesses engage with markets and supply chains. This evaluates access to employment and services via transport networks.
- **Digital connectivity:** Strong digital networks are essential for competitiveness, innovation, and inclusion in a modern economy. This reviews access to high-speed broadband and digital infrastructure.
- Innovation: Innovation underpins long-term productivity growth and resilience, enabling economies to adapt to changing technologies and markets.

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### **Summary findings**





Labour market



**Export** 



Investment



**Transport** 





**Commercial space** 

existing stock,

vulnerabilities in

highlighting

resilience.

HEY faces increasing Hull and East Yorkshire has a smaller workingvacancy rates driven by limited age population, but growth in relatively high commercial employment utilisation and growth. Skills floorspace, low availability of good gaps and low levels of quality space and high-value job creation consistent negative limit productivity and lead to lower average absorption since 2024. Flood risk earnings compared adds pressure on the nationally.

Export
participation is
slightly above the
national average,
but overall export
value remains
modest. This
indicates strength
in engagement, but
limited scale in
high-value export

activity.

GCFC is above national benchmarks, yet firms secure fewer equity rounds and lower average funding values with a business base dominated by established businesses.

Hull has strong public transport links to key employment centres, but much of East Riding faces poor connectivity. This restricts access to opportunities, particularly for rural coastal communities.

Digital Connectivity

HEY outperforms national and regional averages for gigabit broadband, with coverage above 90% and close to universal in Hull. However, Bridlington shows risks of digital exclusion.

Innovation

Innovation activity lags regional and national levels, with fewer businesses identified as innovation active. Internal R&D and product innovation are also notably lower, with fewer Innovate UK grants and limited spinout activity compared to peers.

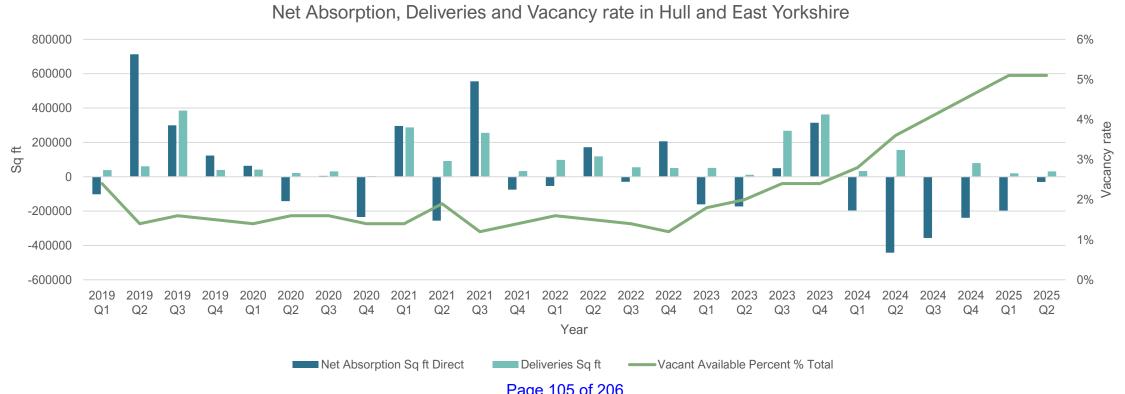
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### **Commercial Space**

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### **Net Absorption, Deliveries and Vacancy rate**

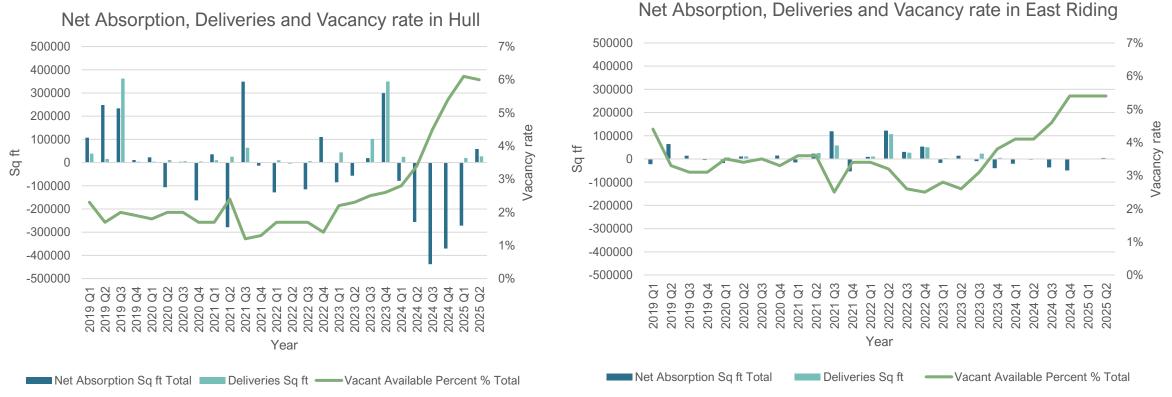
The graph looks at net absorption, deliveries and vacancy rate to understand commercial property market in Hull and East Yorkshire. Despite intermittent new deliveries of floorspace, vacancy rates have risen steadily from below 2% in 2022 to over 5% by 2024, the highest level in the past five years. This indicates a softening of demand relative to supply, suggesting that while space has been delivered to the market, occupier uptake has not kept pace.



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### **Net Absorption, Deliveries and Vacancy rate**

In both Hull and East Riding, vacancy rates have risen sharply since 2022, climbing to over 6% in Hull and more than 5% in East Riding by mid-2025. Hull has seen prolonged negative net absorption through 2023-24, and East Riding shows a similar pattern with spikes in deliveries around 2021-22 but absorption trailing off and vacancy rates rising steadily.



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### **Demand for commercial space**

Hull and East Yorkshire is demonstrating positive market dynamics, with strong levels of activity and clear signs of healthy demand compared with regional and national benchmarks.

The overall vacancy rate in Hull and East Yorkshire stands at 5.49%, which is lower than both the regional average of 6.6% and the national average of 8.9%. This indicates that demand is relatively strong across the market. Looking more closely, office vacancy in the subregion is 5.23%, again below the regional average of 6.56% and significantly below the national figure of 8.83%. By contrast, industrial vacancy is slightly higher at 6.10%, above both the regional (4.83%) and national (5.53%) averages.

Leasing activity is performing strongly, with properties taking on average just 9.3 months to secure a lease. This is a much faster turnaround than seen at the regional level, where properties typically take 14.4 months to let, or nationally, where the figure stands at 12.4 months. Furthermore, the probability of leasing within six months is 42.5%, significantly above the regional benchmark of 30.3% and the national figure of 32.8%.

Indicator	Hull and East Yorkshire	Yorkshire and Humber	UK
Vacancy rate	5.49%	6.6%	8.9%
Vacancy rate - Industrial space	6.10%	4.83%	5.53%
Vacancy rate - office space	5.23%	6.56%	8.83%
Months on market	9.3	14.4	12.4
Probability of leasing in 6 months	42.5%	30.3%	32.8%

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### Supply of commercial space

The supply of commercial space in Hull and East Yorkshire is characterised by lower costs but also limited provision of high-quality stock compared with regional and national benchmarks.

Market asking rent stands at £11.68 per square foot, well below the regional average of £15.65 and the national average of £30.23. Sales prices follow a similar pattern, at £90 per square foot compared with £127 regionally and £342 nationally. Annual rent growth has declined slightly by -0.6%, in contrast to growth of 2% regionally and nationally.

The share of high-quality space (rated 4–5 star) is just 1.9% of stock, compared with 2.3% across Yorkshire and Humber and 2.4% nationally. Vacancy rates for high-quality space are lower at 6.7% than the regional (10.5%) and national (11.2%) averages, but the vast majority of space (99.1%) is rated below 3 stars. Vacancy among this lower-grade stock is 5%, above the regional figure of 3.9%, although growth in this segment remains relatively strong at 3.2%.

Indicator	Hull and East Yorkshire	Yorkshire and Humber	UK
Market asking rent per sq ft	£11.68	£15.65	£30.23
Market sales price per Sq ft	£90	£127	£342
Annual market asking rent growth	-0.6%	2%	2%
Proportion of high-quality space (4-5 star)	1.9%	2.3%	
Vacancy rate of high-quality space (4-5 star)	6.7%	10.5%	11.2%
Growth in vacancy rate of high- quality space	4%	5.7%	3.9%
Proportion of space at lower quality space (less than 3 star)	99.1%	98.7%	
Vacancy rate of lower quality space (less than 3 star)	5%	3.9%	
Growth rate of lower quality space (less than 3 star) of 206	3.2%	1.6%	

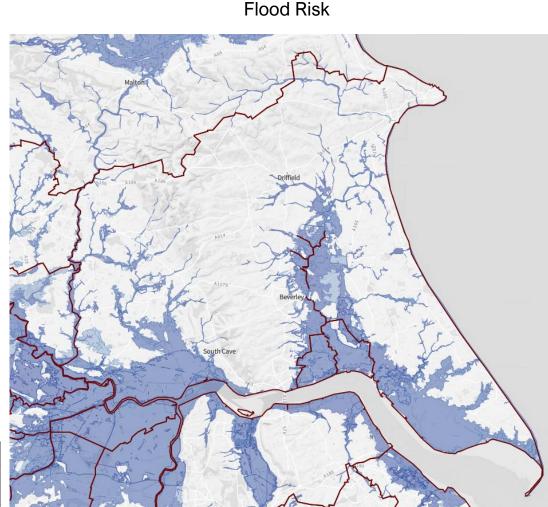
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### Flood and Coastal Risk

Hull and East Yorkshire face significant environmental risks, particularly from flooding and coastal erosion.

Commercial space in Hull and East Yorkshire is heavily constrained by environmental risk. Hull is one of only seven global cities at severe risk of flooding, with just 2% of land outside flood zones and around 90% of the city lies below sea level at high tide. In 2007, the UK's wettest summer on record affected more than 55,000 homes and businesses across the country, with one-fifth of the homes based in Hull.

Coastal erosion adds further pressure, with up to 12 metres of land lost between Holmpton and Easington in 2023–24 compared with the long-term average of 1.4 metres per year. Forecasts indicate 102 homes could be lost by 2105, before accounting for future acceleration due to climate change.



Less than 0.1% chance of flooding in any given year

Between a 0.1% and 1% chance of flooding in any given year

Greater than 1% chance of flooding in appaging 1/203 rof 206

# **Labour market: Supply**

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## **Population**

The population of Hull and East Yorkshire is just over 631,000 in 2024, with a structure that shows both a relatively young profile in Hull and an older population in the East Riding.

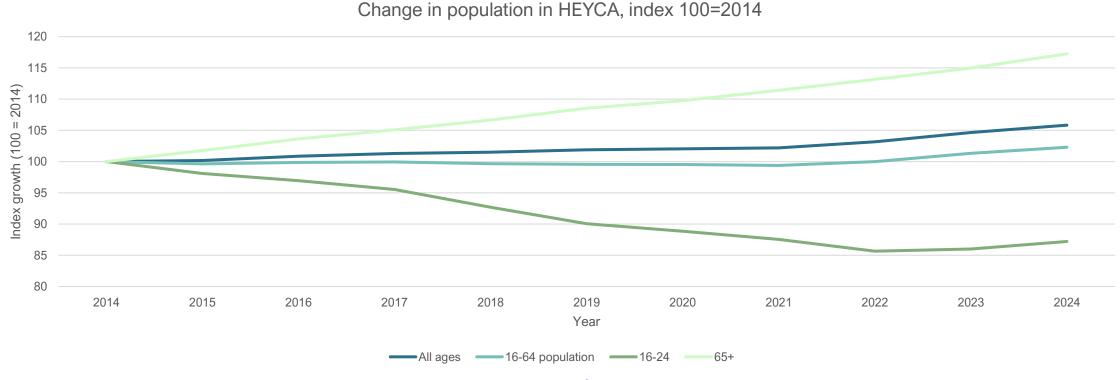
Across Hull and East Yorkshire, 18% of residents are aged 0–15, 9% are aged 16–24, 60% fall within the working-age group, and 22% are over 65. Hull has a younger profile, with 20% aged 0–15, compared to 16% in the wider region, and a higher proportion of working-age residents at 64% compared to 60% in York and North Yorkshire. In contrast, the East Riding has an older population, with 27% aged 65 and over compared with 16% in Hull.

		0-15	16-24	16-64 population	65+	All ages
	2024	110,746	59,272	381,436	139,103	631,285
HEYCA	Proportion of population	18%	9%	60%	22%	
	2024	55,396	31,541	177,306	42,699	275,401
Hull	Proportion of population	20%	11%	64%	16%	
	2024	55,350	27,731	204,130	96,404	355,884
East Riding	Proportion of population	16%	8%	57%	27%	
York and North Yorkshire	2024	130,982	90,866	508,168	205,421	844,571
	Proportion of population	16%	11%	60%	24%	

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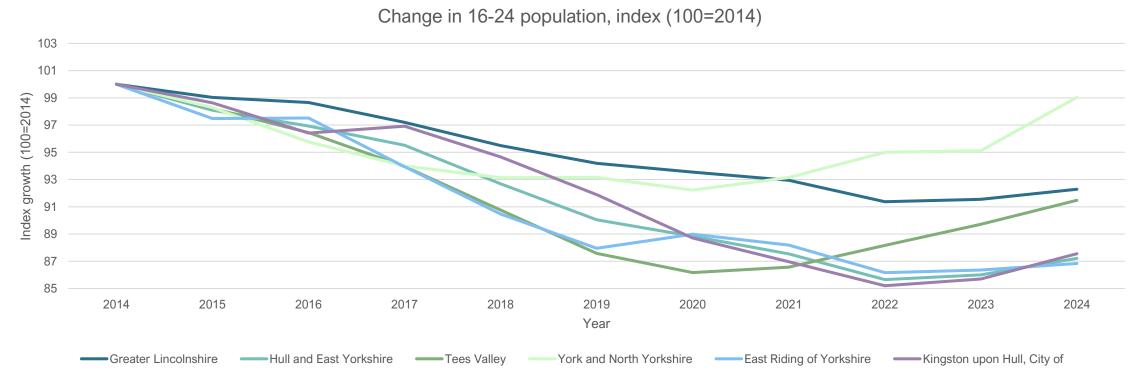
## Population growth in HEYCA

Population growth in Hull and East Yorkshire over the past decade has been modest overall, but with marked differences between age groups. Since 2014, the total population has increased by around 6%, with growth largely driven by older age groups. The number of residents aged 65 and over has risen steadily, growing by almost 18%. In contrast, the working-age population has remained broadly stable, showing only limited growth of around 3%.



## **Growth in 16-24 population**

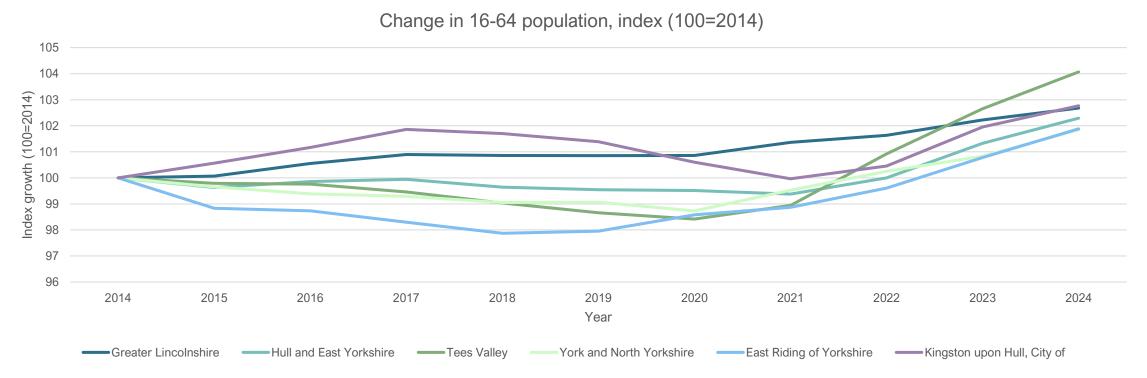
The 16–24 population has declined significantly across Hull and East Yorkshire over the past decade, reflecting a wider regional challenge in retaining young people. Between 2014 and 2024, the number of residents in this age group fell by more than 10% in Hull and East Yorkshire, with similar patterns seen in East Riding, Tees Valley and York and North Yorkshire. Hull itself has experienced one of the sharpest declines, with the trend persisting over the period.



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## **Growth in 16-64 population**

The working-age population (16–64) in Hull and East Yorkshire has shown steady growth over the past decade, with recent increases bringing it closer to the trends seen across comparator areas. Since 2014, the working-age population in the Hull and East Yorkshire has grown by around 3%, broadly in line with Greater Lincolnshire and York and North Yorkshire. Hull itself has seen some fluctuations but has ended the period on an upward trajectory.



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## **Economic inactivity**

Hull and East Yorkshire has high levels of economic inactivity, with a particular concentration among those recorded as long-term sick, which is significantly above the national average.

In total, 26,300 people in the subregion are economically inactive due to long-term sickness. This group accounts for 37% of the inactive population, compared with 28% nationally, and has increased by 26% since 2018, broadly in line with national trends. This represents a major constraint on labour supply.

Other categories of inactivity are less significant in scale. Students account for 18% of the inactive population, well below the national share of 27%, while retirees represent 18% compared with 13% nationally. The proportion looking after family or home is 15%, close to the UK average.

Type of economic inactivity	Number in HEYCA	Proportion of economic inactive in HEYCA	Proportion in UK	Annual Growth	UK	Long term growth (2018-2025)	UK
Students	12,900	18%	27%	-27%	2%	-27%	3%
Looking after family/home	11,100	15%	18%	-23%	-3%	-38%	-20%
Temporary sick	1,100	2%	2%	-76%	21%	-39%	19%
Long-term sick	26,300	37%	28%	-15%	4%	26%	26%
Retired	12,900	18%	13%	9%	-5%	11%	0%
Other	7,500	10%	11%	-36%	2%	-5%	3%

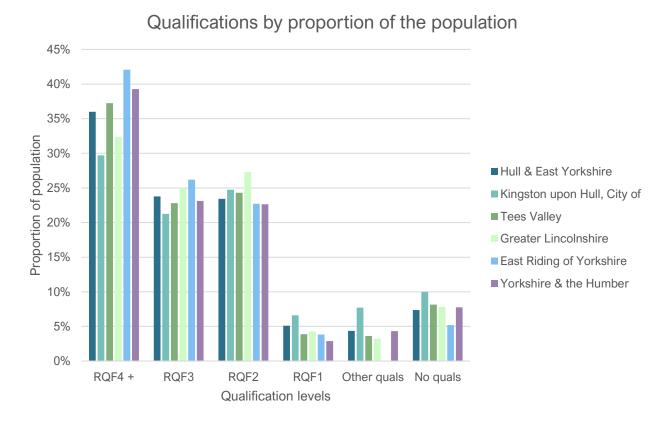
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### Qualifications

Patterns of qualifications across Hull and East Yorkshire show marked differences between Hull and the East Riding, with implications for skills supply and labour market performance.

Hull and East Yorkshire shows a mixed picture of qualification levels compared with other nearby economies. Hull and East Yorkshire performs broadly in line with Tees Valley and Greater Lincolnshire, with a relatively high share of residents holding lower-level or no qualifications and a smaller proportion educated to higher levels.

Hull has a lower proportion of residents with higher-level qualifications (RQF4+) and a larger share with no or low qualifications, reflecting lower educational attainment compared with both the East Riding and regional averages. In contrast, the East Riding has a stronger skills base, with higher proportions of residents holding RQF4+ qualifications and fewer with no qualifications.



## **Occupations**

The occupational profile of Hull and East Yorkshire highlights a workforce concentrated in lower and mid-level occupations, with fewer residents in higher-skilled roles compared with national averages.

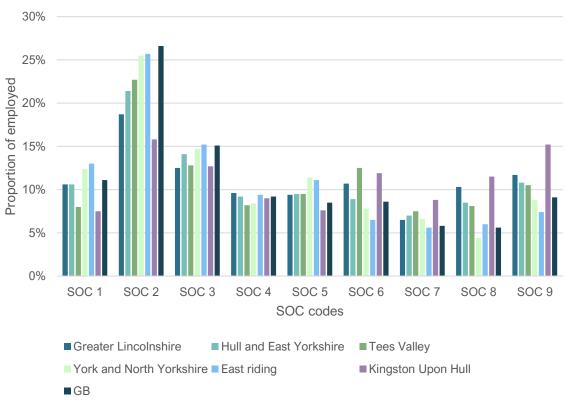
Employment in professional and managerial roles (SOC1–3) is lower than the national benchmark, particularly in Hull where the share of residents in these higher-skilled occupations is notably smaller. By contrast, employment in elementary and process, plant and machine operative roles (SOC8–9) is higher, reflecting the area's industrial and logistics base.

East Riding display stronger representation in professional and associate professional occupations, closer to the national and regional picture.

#### Major SOC2020 Key

- 1 Managers, directors and senior officials
- 2 Professional occupations
- 3 Associate professional occupations
- 4 Administrative and secretarial occupations
- 5 Skilled trades occupations
- 6 Caring, leisure and other service occupations
- **7** Sales and customer service occupations
- 8 Process, plant and machine operatives
- 9 Elementary occupations

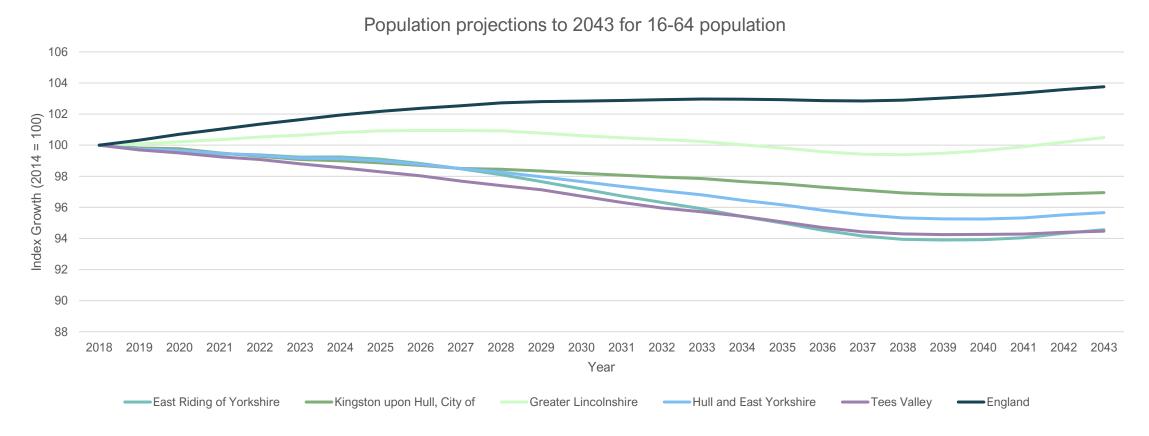
### Employment by Occupation (SOC) Apr 2024-Mar 2025



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## 16-64 population projections

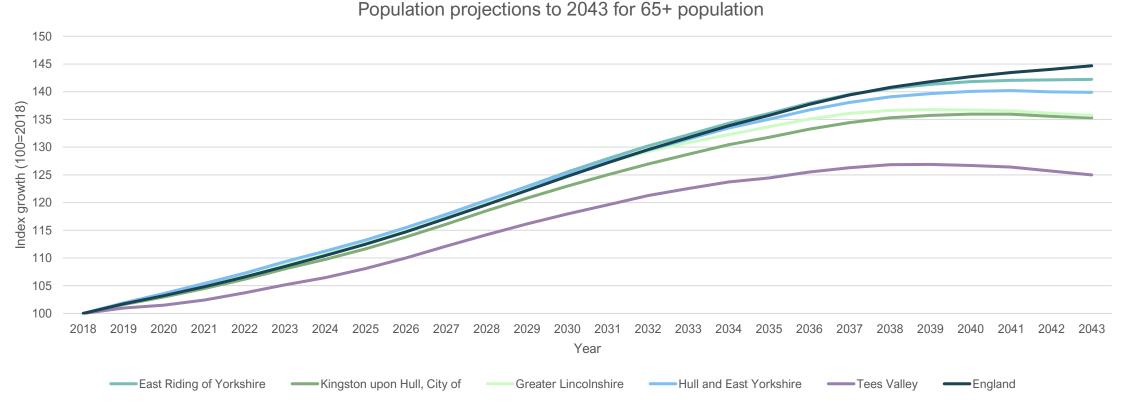
Hull and East Yorkshire's working-age population is projected to decline over the next two decades, falling by around 4% by 2043.



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## 65+ population projections

Comparatively, the 65+ population in HEYCA is expected to grow by 40% to 2043, faster than comparator combined authorities, but slower than national average. This increase is driven by East Riding, expected to increase by 42% compared to 36% in Hull.



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## **Labour Market: Demand**

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## **Employment**

Employment outcomes in Hull and East Yorkshire are broadly in line with national averages, but with differences between Hull and the East Riding that highlight underlying labour market challenges.

Hull and East Yorkshire has an overall economic activity rate of 80.2%, higher than the Great Britain average of 78.5%, similar to the performance of York and North Yorkshire (80%).

Within Hull and East Yorkshire, Hull lags at 72.9% employment rate, but this is higher in East Riding at 79.2%, indicating a stronger labour market. Unemployment in Hull is 6.1%, significantly above the GB rate of 4% and more than triple that of York and North Yorkshire (1.7%).

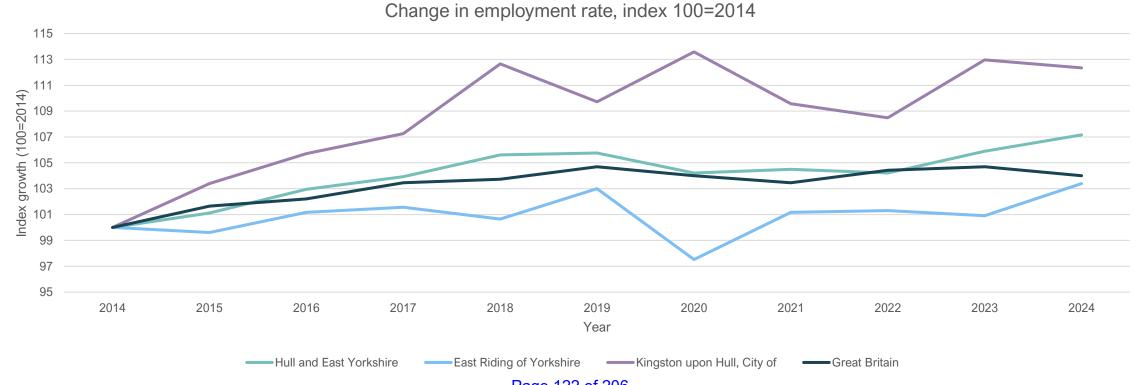
Economic inactivity across Hull and East Yorkshire is 19.8%, lower than the GB figure of 21.5%. Hull records a higher rate of 22.4%, while inactivity is lowest in the East Riding at 17.5%

	HEYCA	Hull	East Riding	GB	Tees Valley	York and North Yorkshire	Greater Lincolnshire
Economic activity rate (%)	80.2	77.6	82.5	78.5	75.1	80.0	75.2
Employment rate (%)	76.3	72.9	79.3	75.4	71.9	78.6	72.7
Unemployment rate (%)	4.8	6.1	3.8	4.0	4.3	1.7	3.4
Economic inactivity (%)	19.8	22.4	17.5	21.5	24.9	20.0	24.8

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## **Growth in employment rate**

Employment rates in Hull and East Yorkshire have grown steadily since 2014, broadly keeping pace with the national trend but with notable differences between Hull and the East Riding. Hull has experienced the strongest relative growth, with its employment rate rising more sharply than the subregional and national averages, despite some volatility in recent years. This contrasts with the East Riding, where growth has been more subdued and relatively flat over much of the past decade



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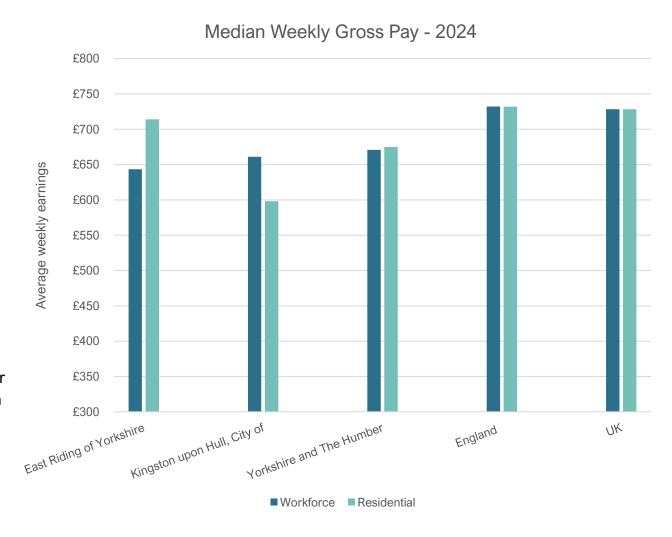
## **Earnings**

Earnings patterns across Hull and East Yorkshire highlight contrasting roles of Hull as an employment hub and the East Riding as a commuter economy.

Despite both the East Riding and Hull being below the national average for both workforce and residential median weekly gross pay, they both paint a very different picture in each category. This can be seen as in the East Riding residential weekly earnings are £70.70 higher than workforce weekly earnings and £39.40 above the regional weekly pay.

Conversely, in Hull, the workforce median weekly pay is £62.90 higher than residential earnings and is slightly below the regional pay of Yorkshire and The Humber at £9.80.

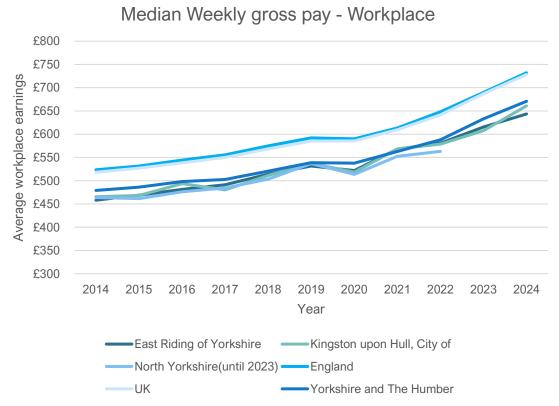
What this implies is that while the East Riding is more of a commuter area with outward commuting to higher-paid jobs, Hull is more of an employment hub, drawing in better-paid workers from elsewhere, but with a resident population that doesn't benefit as much from these higher wages. It can also be seen that Hull's residential weekly pay has been lower in comparison over the last ten years, but the gap has widened more recently.

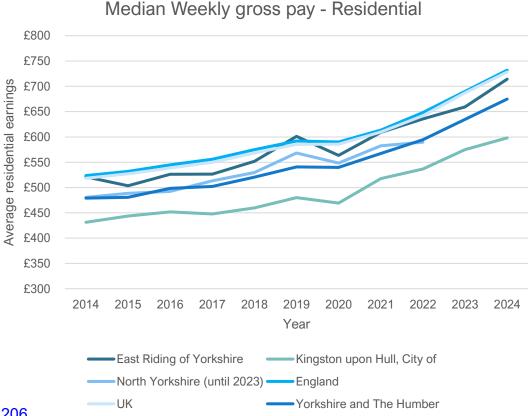


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## **Earnings**

Earnings growth trends in Hull and East Yorkshire reveal a divergence between workplace and residential pay compared with regional and national patterns. Both Hull and the East Riding fall below the national average for workforce and residential median weekly pay.



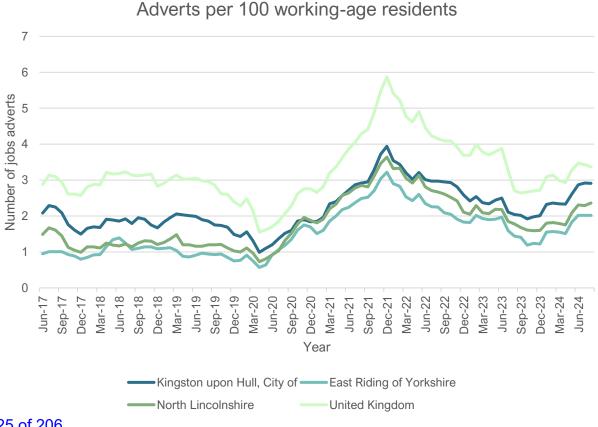


### Job adverts and demand for workers

Job adverts provide insight into the strength of labour demand, highlighting how Hull and East Yorkshire compare with neighbouring and national trends.

Prior to 2020, job advert volumes in the area were relatively stable. They declined sharply during the early stages of the pandemic but rebounded quickly in 2021, peaking in late 2021 and early 2022. While the scale of growth was lower than the national peak, both Hull and East Yorkshire broadly followed the UK trend.

Since then, vacancies have declined through 2022–23 and partially recovered by mid-2024. Hull consistently recorded higher levels of job adverts than the East Riding, although both remain well below the UK average. North Lincolnshire sits close to Hull, showing a similar trajectory.



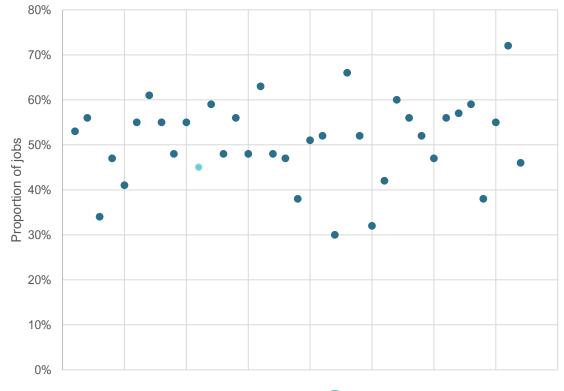
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### Skill demand and mismatch

Hull and East Yorkshire underperform on skill matching compared to many ITL2 areas.

At just 45%, the proportion of jobs in East Yorkshire and Northern Lincolnshire that align with resident skills is below the average for ITL2 areas across England. This lower rate of alignment reflects differences within the region, as East Riding has a relatively high qualification profile while Hull lags behind. The combined figure therefore masks these internal contrasts.

Proportion of jobs that matched the skills of people - All ITL2s, 2023



East Yorkshire and Northern Lincolnshire

ITL2 regions

# **Exporting**

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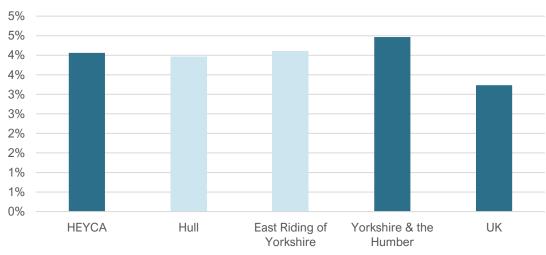
## **Exporting**

Exporting activity in Hull and East Yorkshire is modest compared to neighbouring economies, with similar number of businesses exporting but at a lower value.

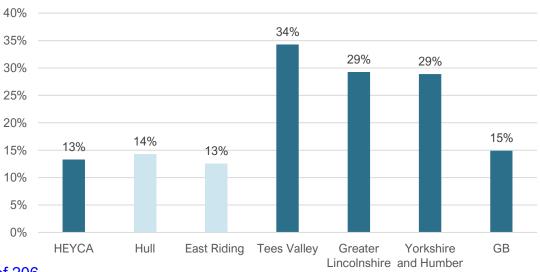
Across HEYCA, around 4% of businesses are exporters, broadly in line with the regional and national averages. However, exports as a share of total GVA are relatively low at 13%, with both Hull and the East Riding recording the same figure or slightly above, compared to much higher levels in nearby economies such as Tees Valley (34%) and Greater Lincolnshire (29%).

This indicates that while the number of exporting firms is similar to other parts of the country, the value of exports relative to overall economic output is weaker. The implication is that Hull and East Yorkshire's export base is narrower and less embedded in higher-value international markets than comparator economies.

#### Percentage of businesses exporting



#### Exports as a proportion of total GVA



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## Investment

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### Investment

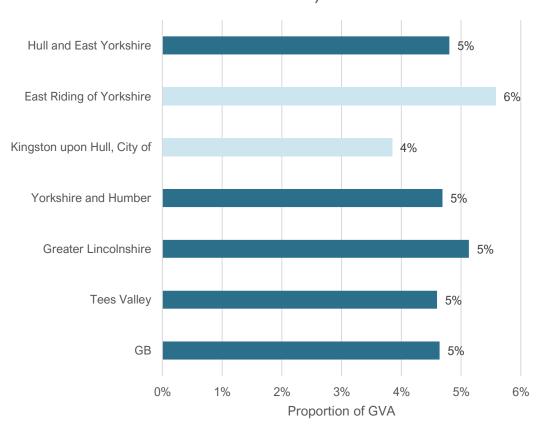
HEYCA notes similar levels of GFCF to comparator combined authorities, and regional/national averages.

Gross Fixed Capital Formation (GFCF) measures the value of investment in fixed assets such as buildings, infrastructure, machinery, and equipment made by businesses, government, and other organisations. It is a key indicator of investment in an economy, representing the total value of fixed assets acquired by businesses, governments, and other institutions.

GFCF accounts for around 5% of GVA in HEYCA on average between 2018-2022, similar to the GB benchmark of 5%. Within this, East Riding performs particularly strongly, with investment equivalent to just over 6% of GVA, higher than regional and national averages.

In contrast, Hull records a lower level at around 4%, highlighting weaker capital formation in the city compared with both regional and national benchmarks.

## GCFC as a proportion of GVA (5-year average 2018-2022)



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### **Business investment**

Business investment in HEYCA is comparatively constrained when set against national and regional benchmarks, with lower levels of equity funding activity, reducing the pipeline of innovation-driven growth.

Access to finance for businesses in HEYCA appears challenging, with just 135 equity funding rounds recorded, equivalent to 4.25 per 1,000 businesses. This is significantly below the UK rate of 7.29 per 1,000, highlighting the challenge of accessing early-stage and growth capital across the region. While the total value of equity funding rounds reached £432m, the overall volume of deals remains low, limiting opportunities for businesses to secure the finance required to scale and innovate.

At the same time, the average deal size in HEYCA, at £3.2m, and the median deal size of £350,000 are broadly in line with national norms, albeit slightly below regional averages.

	Indicator	HEYCA	Compared to the region	Compared to UK
	Equity funding rounds	135	1661	35481
Business Investment	Equity funding rounds per 1000 businesses	4.25	5.14	7.29
	Equity funding amount (£m)	£432	£5,580	£128,861
	Equity funding amount per funding round (£m)	£3.2	£3.7	£3.6
	Median deal size	£350,000	£330,000	£358,000

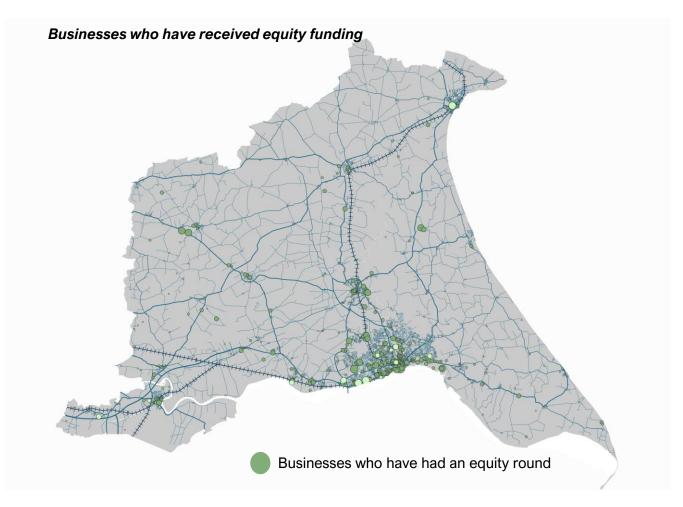
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## **Equity funding**

Equity funding in Hull and East Yorkshire is spatially concentrated, with most activity centred in and around Hull, reflecting the city's role as the main hub for investment.

The distribution of businesses that have secured equity funding rounds shows a heavy concentration in the urban core of Hull, particularly around the city centre and close to the port.

Smaller clusters of equity-funded firms are also evident along key transport corridors, including towards York and Leeds, as well as in market towns across East Yorkshire. However, the density of equity-backed businesses declines sharply outside Hull, highlighting a spatial imbalance in access to finance.



## **Business demography**

HEYCA's business demography highlights structural weaknesses, with lower start-up rates, higher business deaths, and weaker survival compared to national benchmarks, alongside a business base more dependent on established firms and external ownership.

The business birth rate in HEYCA is 10.4, below the UK average, while the death rate is higher at 11.4 with a five-year survival rate of just 40.6%, weaker than both regional and national averages. Although the share of high-growth businesses stands at 53.1 per 10,000, this remains below comparator areas, reflecting challenges in generating a dynamic and resilient enterprise base.

Nearly 90% of businesses are headquartered in the region, with 82% solely based in HEYCA. However, there are relatively high levels of businesses with UK-based or international parent companies, suggesting that larger firms from outside the region play a significant role in shaping the business landscape. Business stage data further illustrates this structure, with only 1.6% of businesses classed as scale-ups and 14.2% in early seed or venture stages.

	Indicator	HEYCA	Yorkshire & Humber	UK
	Business birth rate	10.4	11	11
	Business death rate	11.4	11.5	10.8
Dunimana	5-year survival rate	40.6	41	39.4
Business Environment	Business Churn	21.8	22.5	21.8
Environment	High growth businesses (per 10,000)	53.1	48.1	47.9
	Business density	335	343.79	409.41
	% of businesses that are HQ/reg	89.87%	91.75%	-
	% solely based in region	81.55%	84.97%	-
Business	% with International Parent Company	3.08%	2.42%	2.62%
Structures	% with UK based parent company	8.91%	7.08%	6.03%
	% Private Limited: share capital	96.20%	95.51%	93.26%
	% Private Limited: no share capital	2.67%	2.95%	3.09%
	% Public Limited: share capital	0.18%	0.12%	0.08%
	% est in last 5 years	44.79%	48.34%	51%
Business Stage	% est over 20 years ago	15.67%	12.16%	11%
	% with evolution stage tracked	2.17%	1.67%	1.21%
	% of tracked at seed/venture stage	14.20%	22.97%	40.33%
	% of tracked at growth stage	9.86%	9.64%	10.53%
	% of tracked established	68.84%	51.09%	38.32%
	% scale ups	1.60%	1.03%	0.56%

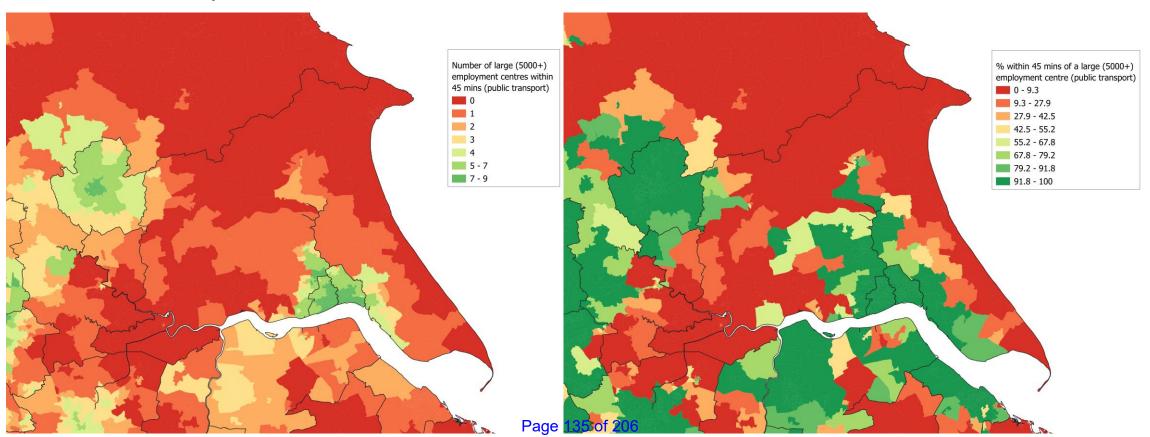
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# **Transport**

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## **Transport**

Access to large employment centres by public transport is highly uneven across Hull and East Yorkshire. Whilst Hull has strong accessibility to large employment centres in 45 minutes, the maps show that only limited parts of East Riding achieve high levels of accessibility within 45 minutes of a centre with 5,000 or more jobs.



Source: Journey time statistics, DfT

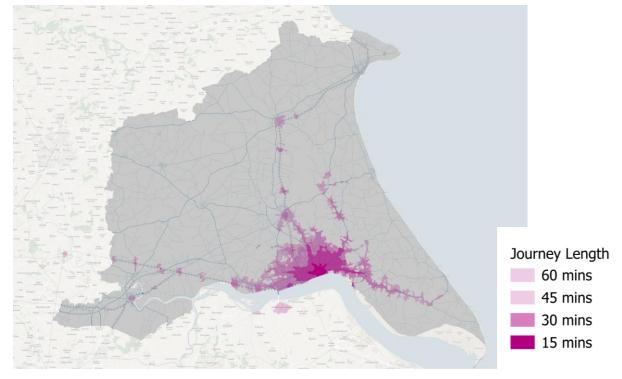
## **Transport Connectivity**

The maps below show public transport connectivity from two key employment areas in Hull and East Yorkshire, Beverly and Hull City Centre. Hull City Centre is accessible in 60 minutes for all areas of Hull, but only accessible to places with train stations in East Riding. Beverley displays a similar pattern, with access largely confined to the local area and main transport corridors.

#### **Public Transport connectivity from Beverly**



#### **Public Transport connectivity from Hull City Centre**

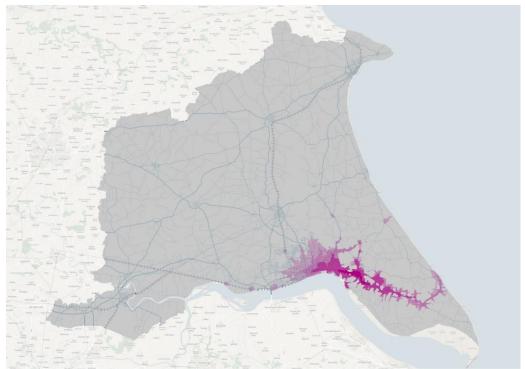


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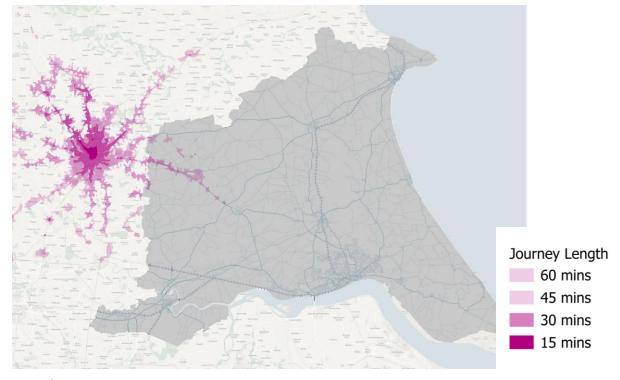
## **Transport Connectivity**

The maps below show public transport connectivity from two key employment areas in Hull and East Yorkshire, Hull Waterside and York. From Hull Waterside, public transport has covered east-west but leaves large areas of East Yorkshire outside effective commuting range. By contrast, connectivity from York demonstrates a far wider reach for residents in Hull, with limited connectivity in 60 minutes to some areas of East Riding.

#### **Public Transport connectivity from Hull Waterside**



#### **Public Transport connectivity from York**



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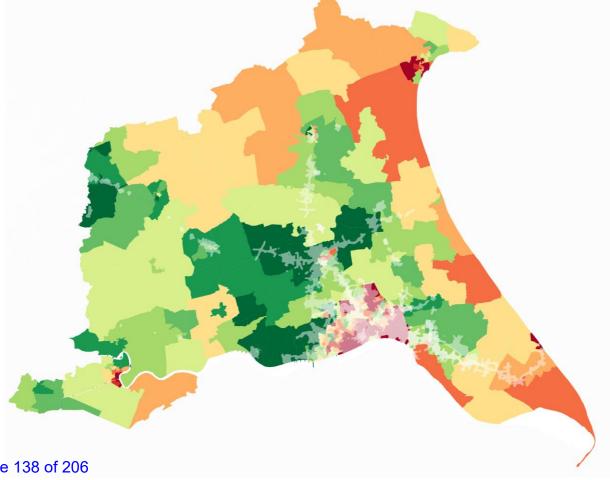
## **Transport and employment**

Transport and employment patterns highlight the importance of connectivity in addressing deprivation and improving access to opportunity.

To understand public transport access to areas in relation to their relative level of deprivation, we have overlayed the travel time isochrones for a 45-minute public transport journey to the 3 areas in Hull and East Yorkshire with highest level of employment and York, using the 2019 IMD map.

The analysis shows that while areas in central Hull benefit from relatively strong access to employment opportunities, some peripheral and rural communities, especially costal communities, face more limited public transport connectivity. These same locations often coincide with higher levels of deprivation, reinforcing spatial inequalities and creating barriers to labour market participation.

#### Transport connectivity to highest activity areas, and deprivation



# **Digital Connectivity**

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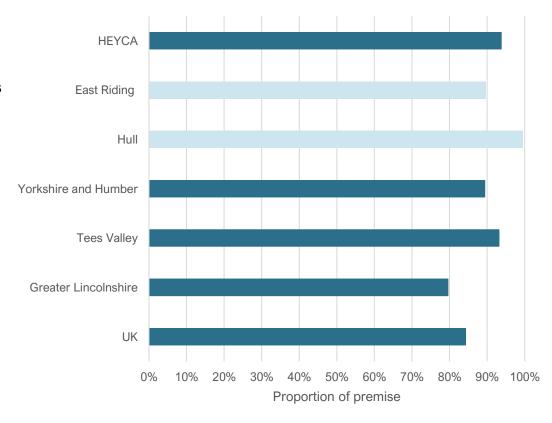
## **Digital Connectivity**

Digital connectivity is a relative strength for HEYCA, with levels of gigabit broadband availability significantly exceeding the UK average and supporting both business competitiveness and household access.

Gigabit broadband refers to high-speed internet connectivity capable of delivering speeds of at least 1 gigabit per second (Gbps). This enables faster downloads, seamless streaming, and improved digital connectivity for businesses and households. Access to gigabit broadband is increasingly seen as essential infrastructure, underpinning productivity, innovation, and quality of life.

Across HEYCA, coverage exceeds 90% of premises, with Hull itself close to universal availability. This is well above the UK average of just over 80% and places the region ahead of many comparator areas. For example, availability in Greater Lincolnshire is closer to the national figure, while Tees Valley also falls below Hull's near-complete coverage. East Riding also performs strongly, with levels broadly in line with HEYCA overall.

### Gigabit Availability as a proportion of premises



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## **Innovation**

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### **Innovation**

Less businesses in Hull and East Yorkshire are innovation active, with fewer businesses receiving funding compared to region and nation.

Only 26.8% of businesses in Hull and East Yorkshire are classed as innovation active, significantly below Yorkshire and the Humber (35.4%) and the UK average (36.3%). This underlines a structural challenge in embedding innovation across the local business base. The proportion of firms engaged in product innovation is particularly low at 13%, compared to almost one in five nationally.

Internal research and development activity is also limited, with just 7.8% of businesses conducting in-house R&D, well below the national benchmark of 13.8%. This suggests a weaker pipeline of innovation-led growth and fewer firms investing directly in knowledge creation. 0.4% of businesses report spending on R&D in their filings, marginally above the UK average, this captures only large firms and represents a narrow base of activity rather than broad engagement across the economy and this is not geographically specific, with no way to determine whether these businesses with a base in Hull and East Yorkshire are spending this money in the region.

Access to external innovation finance is another constraint. Only 0.02% of businesses have received an R&D grant, still in line with national levels, but far too small a proportion to drive significant regional transformation.

Indicators	Hull and East Yorkshire	Compared to region	Compared to UK
% Innovation Active	26.8%	35.4%	36.3%
% product innovators	13%	19.6%	19.4%
% performing internal R&D	7.8%	13.7%	13.8%
% reporting spending on R&D	0.4%	0.3%	0.2%
% receiving R&D grant	0.02%	0.02%	0.02%

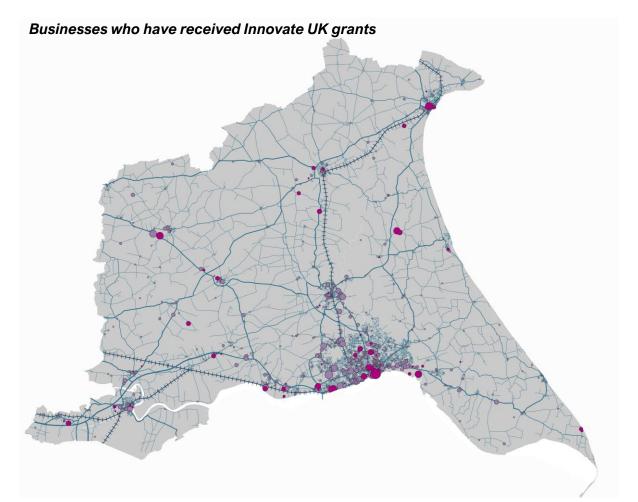
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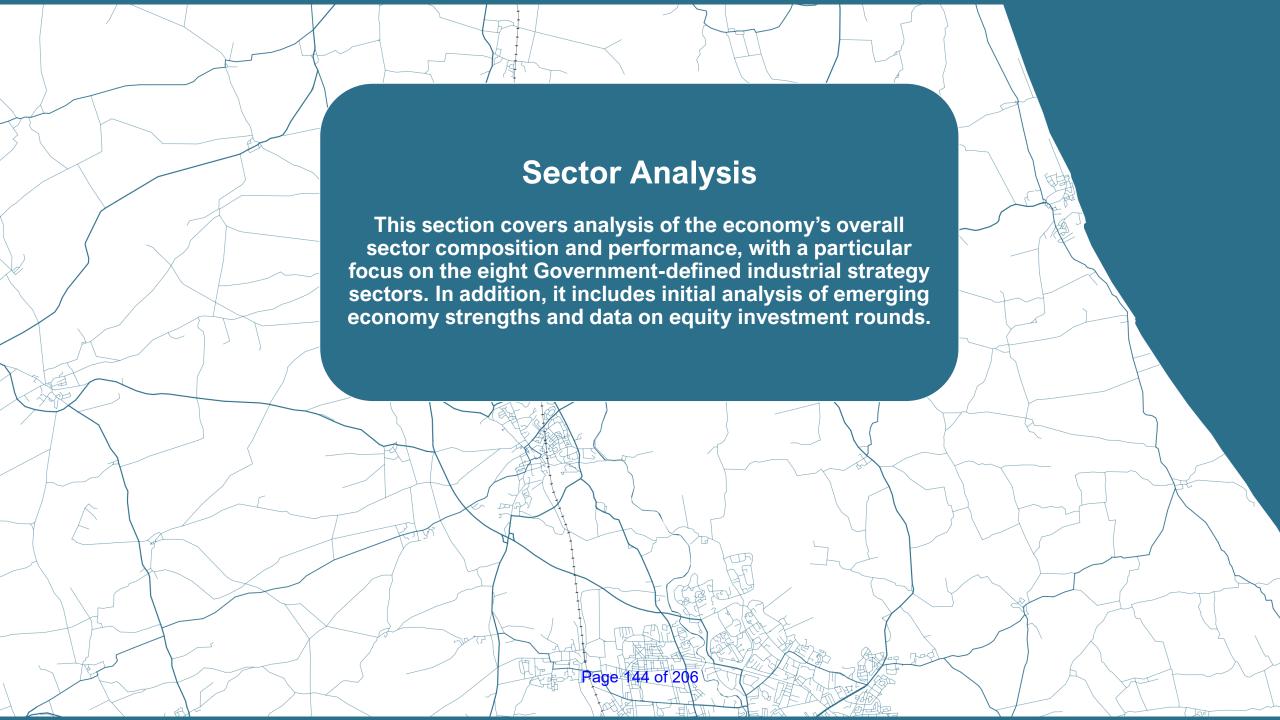
### Where are innovative businesses located?

Innovative businesses in Hull and East Yorkshire demonstrate a strong urban concentration with distinct clusters emerging across the region.

The map highlights the location of businesses in receipt of Innovate UK grants, providing a proxy for innovation activity. Most grant recipients are concentrated in and around Hull, reflecting the city's role as the primary hub for research, development, and innovation. This aligns with Hull's wider economic profile as a centre for higher-value services, advanced manufacturing, and digital activity.

Smaller but notable concentrations are visible in Beverley, Goole, and Bridlington, as well as in locations with connectivity to larger regional centres such as York and Leeds. These emerging nodes suggest a wider innovation ecosystem beyond Hull, though at a much smaller scale.



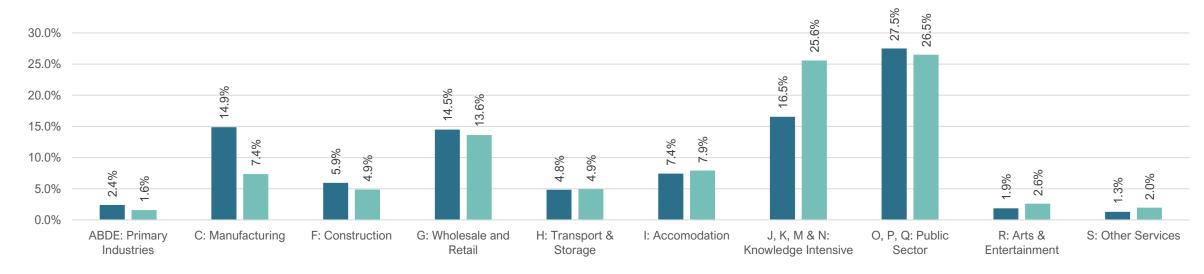


# Sectoral make-up of the economy: Employment

This chart shows the share of total employment in each broad industrial group in Hull and East Yorkshire compared with the national average. The local economy is characterised by above-average employment in the Public Sector, Manufacturing and Retail, with manufacturing standing out as a particular strength. In contrast, knowledge-intensive industries employ a smaller share locally than nationally, highlighting a structural gap in higher-value roles.

Other sectors such as Construction, Accommodation and Transport & Storage are broadly aligned with national levels, while Primary Industries remain slightly more significant in the local area.

#### % of Total Employment by Sector to Total, 2023

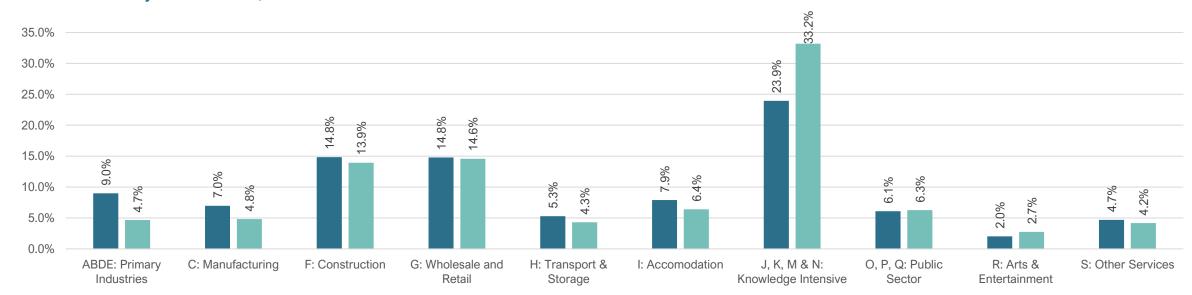


### Sectoral make-up of the economy: Firms

This chart shows the share of the total business base in each broad industrial group in Hull and East Yorkshire compared with the national average.

We see similar patterns to the employment data with Primary industries accounting for a much larger share of the business base (9% vs 4.7% nationally), reflecting the rural and agricultural base of the area. Knowledge-Intensive sectors continue to be under-represented locally (24% vs 33% nationally), highlighting a structural gap in higher-value business activity compared to GB.

#### % of Total Firms by Sector to Total, 2024

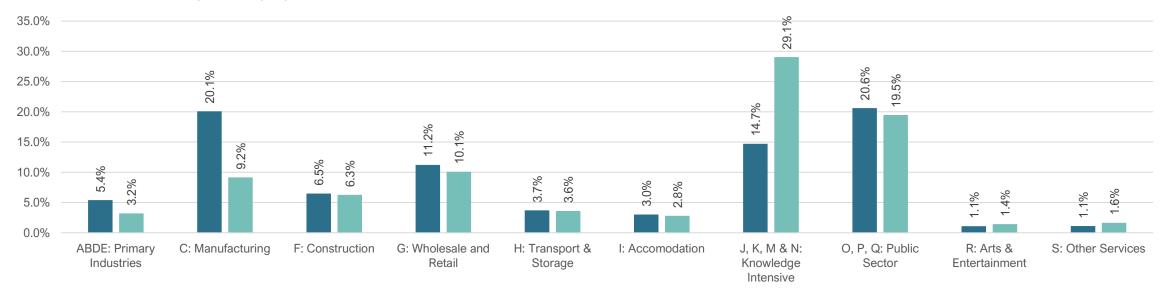


# Sectoral make-up of the economy: GVA

This chart shows the share of the total GVA in each broad industrial group in Hull and East Yorkshire compared with the national average. Manufacturing is the largest contributor to local GVA (20.1% vs 9.2% nationally), confirming its core importance to the local economy.

As with employment and firms, knowledge-intensive sectors, typically high value and major contributors in cities, are under-represented in value terms. The larger difference in value versus the previous metrics suggests that the activity that does take place is lower value on average (14.7% vs 29.1% nationally), highlighting a structural weakness in higher-value activity.

#### % of Gross Value Added by Sector (£m) to Total, 2023

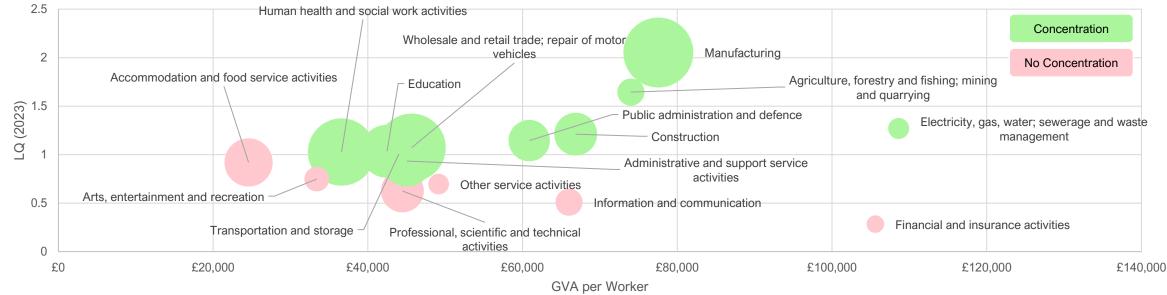


# Sectoral make-up of the economy: Productivity

The local economy is weighted towards traditionally productive industries, but structurally weaker in knowledge-intensive or high value sectors.

The below chart shows estimated productivity and level of concentration on the axis, with the size of the bubbles showing employment in the sector. We can see that the region's economy is anchored by manufacturing, agriculture and utilities, which are all productive and regionally specialised while the largest employers (health, education, and retail) are less productive, meaning they drive volume of jobs more than economic value and high-value service sectors (finance, ICT, professional services) are weakly represented.

#### LQ Score against GVA per Worker (Bubble size indicates total number of jobs)



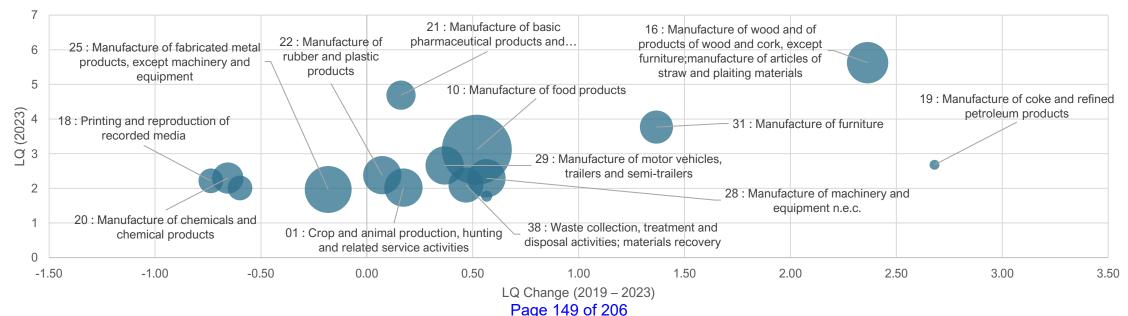
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### Sectoral make-up of the economy: Zoomed In

This chart shows the 15 sectors where Hull and East Yorkshire have the highest LQ, visualising how the degree of specialism in these sectors changed between 2019 and 2023, as well as employment in these specialisms. Hull & East Yorkshire has clear specialisms in wood products, coke & refined petroleum, furniture, and food products, with strong concentrations and in many cases growth. Sectors like motor vehicles and waste collection/recycling also combine above-average concentration with positive recent expansion.

However, declining employment (and concentration) in specialised sectors including chemicals, printing, and non-metallic minerals highlights structural challenges in parts of traditional manufacturing.

#### Employment LQ Score and Change - Top 15 Sectors by LQ



### **Sectoral Trends**

- Growth sectors: Construction, Transport & Storage, Accommodation, and Knowledge-Intensive industries are all driving expansion with strong job creation and/or long-term GVA growth.
- Restructuring sectors: Wholesale & Retail and Manufacturing show falling employment but rising GVA, pointing to potential productivity gains rather than job growth.
- **Declining sectors:** Primary Industries and Arts & Entertainment face sustained contraction in jobs, firms, and value, while the Public Sector remains large but flat.

#### % Key Metrics Change by Sector

Performed better than GB average

Performed worse than GB average

	Employment (2023)	1 Year Change	5 Year Change	8 Year Change	Firm Count (2024)	1 Year Change	5 Year Change	8 Year Change	Gross Value Added (2023) (£m)	1 Year Change	5 Year Change	8 Year Change
ABDE: Primary Industries 💛	6,450	-11.6%	-13.4%	-0.8%	1,830	-1.1%	-8.5%	-9.0%	£835	10.4%	4.8%	-7.2%
C: Manufacturing 🔘	40,000	-9.1%	0.0%	8.1%	1,420	-4.1%	0.0%	0.4%	£3,102	-4.7%	1.2%	6.3%
F: Construction ^	16,000	6.7%	45.5%	33.3%	3,020	-0.3%	13.1%	12.1%	£1,003	0.0%	33.0%	25.5%
G: Wholesale and Retail 🗘	39,000	-4.9%	0.0%	0.0%	3,010	-3.4%	-5.8%	-1.1%	£1,735	1.8%	6.2%	18.1%
H: Transport & Storage 🔨	13,000	18.2%	8.3%	18.2%	1,080	-7.3%	21.3%	2.4%	£572	2.3%	-9.4%	-11.0%
I: Accomodation 🔨	20,000	5.3%	11.1%	25.0%	1,610	-2.7%	6.6%	8.4%	£467	-3.5%	14.2%	33.0%
J, K, M & N: Knowledge Intensive ^	44,500	7.2%	-3.8%	11.3%	4,875	0.7%	-2.9%	-1.6%	£2,273	5.0%	12.6%	38.6%
O, P, Q: Public Sector	74,000	1.4%	4.2%	0.0%	1,240	1.2%	4.2%	-1.6%	£3,183	2.7%	1.8%	-3.7%
R: Arts & Entertainment 💙	5,000	0.0%	-16.7%	-16.7%	415	1.2%	7.8%	13.7%	£167	-1.8%	13.6%	10.6%
S: Other Services	3,500	0.0%	0.0%	0.0%	955	1.1%	1.1%	3.8%	£172	-5.0%	-5.0%	-5.5%

### **Sectoral Trends: Zoomed In**

Across the largest sectors by employment concentrations, several key employment trends are emerging. Several of these sub-sectors are growing strongly (e.g. wood products +75%, furniture +29%, food +25%) and outperforming national averages while other sub-sectors (e.g. chemicals, printing, and non-metallic minerals) are in decline, reflecting wider structural challenges in parts of the region's established manufacturing base

Top 15 SIC2 sub-sectors by Employment LQ in HEYCA (2019 - 2024)

SIC 2 Sub Sector	LQ	Total (2023)	Volume Change (2019 - 2023)	HEYCA % Change	Tees Valley CA % Change	Greater Lincolnshire % Change	GB % Change
Manufacture of wood and of products of wood and cork, except furniture;manufacture of articles of straw and plaiting materials	5.6	3,500	1,500	75.00%	-55.60%	12.50%	1.40%
Manufacture of basic pharmaceutical products and pharmaceutical preparations	4.7	1,750	250	16.70%	0.00%	33.30%	12.50%
Manufacture of furniture	3.8	2,250	500	28.60%	0.00%	28.60%	-18.20%
Manufacture of food products	3.1	10,000	2,000	25.00%	0.00%	-4.20%	4.00%
Manufacture of coke and refined petroleum products	2.7	200	200	200%	-25.00%	-16.70%	0.00%
Manufacture of motor vehicles, trailers and semi-trailers	2.7	3,000	0	0.00%	75.00%	0.00%	-13.90%
Manufacture of rubber and plastic products	2.4	3,000	0	0.00%	-33.30%	12.50%	-3.20%
Manufacture of chemicals and chemical products	2.3	2,000	-250	-11.10%	-25.00%	-12.50%	14.10%
Manufacture of machinery and equipment n.e.c.	2.3	3,000	500	20.00%	-42.90%	-14.30%	-9.70%
Printing and reproduction of recorded media	2.2	1,250	-1,000	-44.40%	0.00%	0.00%	-26.10%
Waste collection, treatment and disposal activities; materials recovery	2.1	2,500	750	42.90%	150.00%	-16.70%	10.80%
Crop and animal production, hunting and related service activities	2	3,000	0	0.00%	-11.10%	-10.00%	-8.70%
Manufacture of other non-metallic mineral products	2	1,250	-500	-28.60%	0.00%	-14.30%	-7.40%
Manufacture of fabricated metal products, except machinery and equipment	2	4,500	-500	-10.00%	0.00%	0.00%	-1.80%
Other mining and quarrying	1.8	250	50	25.00%	20.00%	11.10%	-15.00%

### **Sector Growth Index**

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### **Sector Growth Index introduction**

The sector growth index aggregates five-year changes to employment, business counts, GVA, productivity and concentration (Location Quotients for employment and businesses) to assess how Hull and East Yorkshire's sectors have changed since 2018.

- If a sector is seeing significant growth (>2% CAGR) in either employment, business counts, GVA and productivity (GVA per job)), it adds a score of 1.
  - The index also considers whether each sector is growing nationally. If the sector is growing significantly faster than the GB average, it adds an additional 0.5 points.
- Average concentration is found by calculating the mean employment and business count Location Quotient (LQ). If average concentration has grown by more than 5% in the period, this adds a further 1 point to the overall score as this already considers national trends, no additional points are added.
- The maximum score possible is 7, meaning that a sector has seen growth across all measures, each of which is also growing faster than nationally. -7 is the lowest possible score, reflecting a decline across all measures.
- Bespoke sector definitions have been constructed by classifying 5-digit SIC codes into 26 sector groups, reflecting the full economic picture in HEYCA. The selection of sectors includes foundational sectors and some specific sectors relevant to Hull and East Yorkshire's economy. All sectors analysed are mutually exclusive, meaning there is no crossover, and add up to total employment in the region. For example, manufacturing activities within agrifood, clean energy and defence are excluded from the manufacturing definition, despite still being in the same broad industry group previously analysed.

#### For each growth measure:

Condition	Score
Growing and faster than GB	1.5
Growing and equivalent to GB	1.0
Growing but slower than GB; or Static but GB declining	0.5
Static	0.0
Static but GB growing; or Declining but slower than GB	-0.5
Declining equivalent to GB	-1.0
Declining and faster than GB	-1.5

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### Productive sectors tend to have a higher concentration

Sector grouping	Employment	Businesses	GVA (millions)	Productivity	Average concentration
Retail & Wholesale	37,935	3,045	£1,660	£43,755	1.06
Health and Social Care	36,985	775	£1,354	£36,609	0.98
Professional Business Services	25,450	2,505	£1,276	£50,129	0.78
Leisure & Hospitality	24,585	1,975	£638	£25,950	1.03
Education	23,325	295	£975	£41,779	0.95
Manufacturing	16,825	885	£1,513	£89,918	1.81
Agri-Food	16,790	1,935	£903	£53,761	2.04
Construction	15,515	3,010	£1,003	£64,647	1.12
Public Administration	13,910	125	£852	£61,251	1.64
Other Services	10,360	1,360	£352	£33,995	0.90
Digital and Technologies	7,825	1,160	£443	£56,657	0.61
Advanced Manufacturing	7,720	195	£632	£81,909	2.13
Ports and Logistics	6,610	725	£300	£45,349	1.48
Other Transport activities	6,455	430	£279	£43,298	0.83
Real Estate	3,485	745	£1,914	£549,211	0.75
Utilities	2,930	130	£326	£111,301	1.47
Financial Services	2,565	315	£264	£102,924	0.51
Life Sciences	1,930	20	£291	£150,587	1.27
Creative Industries	1,855	380	£89	£48,095	0.49
Digital and Creative	1,845	195	£105	£57,035	0.58
Clean Energy	1,535	60	£117	£76,310	1.25
Fossil Fuels	1,135	15	£73	£64,439	1.03
Digital Manufacturing	525	20	£35	£66,294	0.53
Mining	250	5	£16	£63,948	1.54
Defence	185	5	£13	£70,352	16.62
Total	268,530	20,305	£15,400	£57,400	54 of 206

Hull and East Yorkshire's most productive sectors are more concentrated in the region than nationally.

This table summarises the data produced for each sector at a static level in 2023. The sectors are colour-coded from most (green) to least (red).

As expected, the top employing sectors are more likely to have higher business counts and GVA. However, disparities exist, such as public administration, health, and education, which have high employment but low business counts, likely due to large employers such as the NHS. The largest employing sectors in Hull and East Yorkshire have some of the lowest productivity levels, bringing down the average.

Some correlations can be identified between the relative indicators. Though smaller in size, some of the most productive sectors in Hull and East Yorkshire also have a high business and employment concentration. The most productive sector is life sciences, with a GVA per job of £150,000, but it also has around 27% greater concentration of businesses and employment than Great Britain. Six of the seven most productive sectors have an average concentration of 1.25 or more.

### The sectors growth story is mixed

Sector grouping	Employment growth	Business growth	GVA growth	Productivity growth	Concentration change
Retail & Wholesale	0.0%	0.7%	0.9%	0.9%	2.3%
Health and Social Care	1.5%	-0.6%	-1.9%	-3.4%	-2.4%
Professional Business Services	-1.4%	-1.0%	0.2%	1.6%	-5.5%
Leisure & Hospitality	0.9%	1.9%	3.0%	2.0%	-3.7%
Education	0.8%	-0.7%	3.3%	2.4%	-3.0%
Manufacturing	-2.2%	1.0%	1.1%	3.4%	1.0%
Agri-Food	2.8%	-1.7%	3.3%	0.5%	4.7%
Construction	6.9%	2.2%	5.9%	-1.0%	14.3%
Public Administration	0.1%	0.0%	1.2%	1.1%	-8.6%
Other Services	1.2%	1.7%	4.9%	3.6%	0.7%
Digital and Technologies	-1.3%	-2.3%	7.5%	8.9%	0.7%
Advanced Manufacturing	-0.5%	4.0%	-1.7%	-1.2%	13.7%
Ports and Logistics	1.1%	1.3%	-0.8%	-1.9%	-2.3%
Other Transport activities	1.2%	2.5%	-2.8%	-3.9%	-6.5%
Real Estate	-1.7%	2.1%	1.2%	3.0%	-11.0%
Utilities	0.6%	6.5%	-4.4%	-5.0%	5.8%
Financial Services	2.3%	0.6%	-0.3%	-2.6%	3.5%
Life Sciences	-0.7%	-10.6%	-0.2%	0.5%	-32.8%
Creative Industries	-2.0%	1.7%	1.1%	3.2%	-4.4%
Digital and Creative	-6.3%	-1.0%	-7.9%	-1.7%	-25.1%
Clean Energy	5.0%	3.7%	5.2%	0.2%	20.4%
Fossil Fuels	2.4%	-5.6%	5.5%	3.0%	9.6%
Digital Manufacturing	3.6%	-4.4%	1.0%	-2.5%	-0.6%
Mining	0.8%	-12.9%	7.0%	6.2%	-39.0%
Defence	2.9%	0.0%	4.9%	1.9%	23.1%
Total	0.60%	0.50%	1.09%	0 <mark>-49% 15</mark>	5 of 20%

In Hull and East Yorkshire, very few sectors are showing strong growth across all metrics.

This table shows the compound annual growth rates for each metric over five years (2018-2023). The five-year total change in average concentration calculates the growth in average concentration.

The sectors experiencing the strongest growth in terms of size are construction, utilities, and clean energy, with construction showing a strong annualised growth in employment, and utilities in businesses. In contrast, clean energy has a strong annualised growth in both. In terms of value, mining and digital technologies see a substantial productivity growth in five years, despite declining size.

Only a few sectors see growth in most indicators. The only sectors that have seen significant growth in three or more indicators are construction, defence and both clean and fossil fuel energy.

Due to varying growth rates across Hull and East Yorkshire's sectors when applying different measures, the following slide shows the growth index, aggregating all growth rates into a single score.

#### **Growth Index Score**

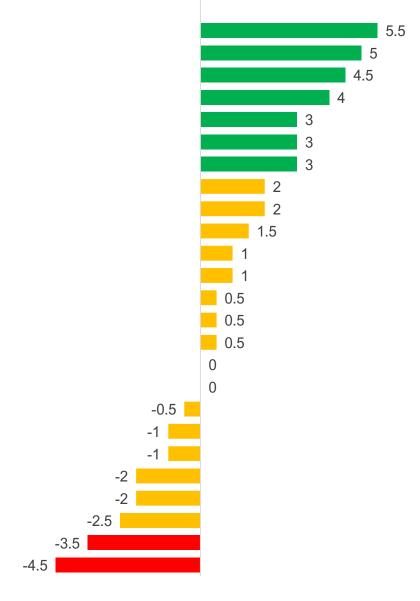
# **Growth in energy** and defence

Growth is occurring across a broad range of sectors but declines in life sciences and digital and creative.

When aggregating the different growth measures, the clean energy supply chain is shown to have the most significant growth in Hull and East Yorkshire, driven by electricity production, the manufacture of engines and turbines in the supply chain. Seven of the sectors assessed are experiencing significant growth, including both smaller, more concentrated sectors, such as defence and energy, as well as several larger, foundational economy sectors, like construction, hospitality, and agrifood.

On the other end of the scale, there have been declines to life sciences and digital and creative industries. Life sciences has seen a decline in manufacturing businesses, whilst digital and creative industries have seen a decline in both employment and GVA within press and media services.





# **Specialisms in manufacturing SICs**

A high share of specialised sub-sectors are in manufacturing activities, emphasising regional strength.

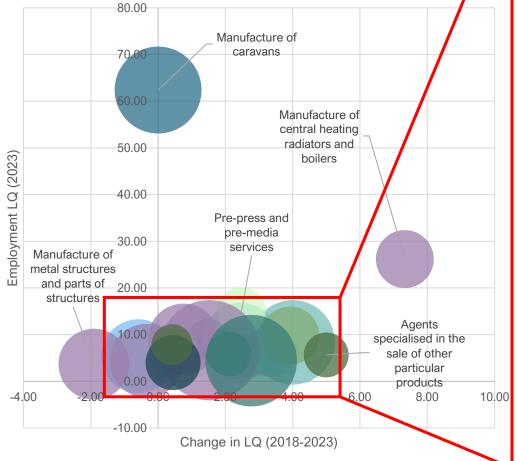
This table shows the 20 most specialised 5-digit SICs in Hull and East Yorkshire employing 500 people or more, as well as the LQ change over the past five years.

The most specialised sector is the manufacture of caravans, part of the DBT definition for advanced manufacturing; over 50% of total GB employment in this sub-sector is employed in Hull and East Yorkshire. The table highlights that manufacturing, advanced manufacturing and agri-food have strong specialisms in Hull and East Yorkshire, each with several sub-sectors amongst the most specialised. There are also specialisms in some smaller sector groupings such as life sciences, marine and the clean energy supply chain. Only a few of the top specialised sectors have seen a decline to specialism.

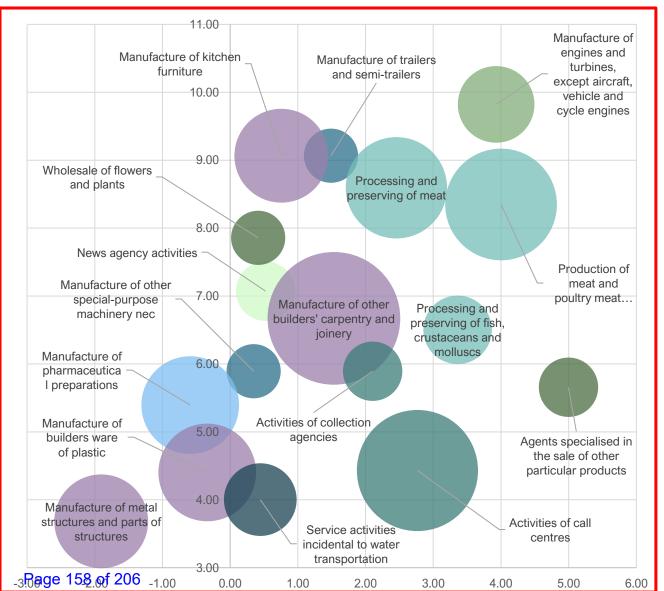
The following slide visualises these specialisms in a bubble chart, with LQ on the x axis, change in LQ on the y axis, and employment as bubble size.

SIC code	Definition	Employment (2023)	Location Quotient (2023)	LQ Change (2018- 2023)
Manufacture of caravans	Advanced Manufacturing	2,250	62.40	0.00
Manufacture of central heating radiators and boilers	Manufacturing	1,000	26.19	7.33
Pre-press and pre-media services	Digital and Creative	700	15.00	2.48
Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	Clean Energy	1,000	9.82	3.93
Manufacture of trailers and semi-trailers	Advanced Manufacturing	500	9.07	1.49
Manufacture of kitchen furniture	Manufacturing	1,500	9.07	0.76
Processing and preserving of meat	Agri-Food	1,750	8.59	2.46
Production of meat and poultry meat products	Agri-Food	2,125	8.35	4.00
Wholesale of flowers and plants	Retail & Wholesale	500	7.86	0.41
News agency activities	Digital and Creative	600	7.07	0.52
Manufacture of other builders' carpentry and joinery	Manufacturing	3,000	6.67	1.53
Processing and preserving of fish, crustaceans and molluscs	Agri-Food	800	6.50	3.36
Manufacture of other special-purpose machinery nec	Advanced Manufacturing	500	5.89	0.35
Activities of collection agencies	Professional Business Services	600	5.89	2.10
Agents specialised in the sale of other particular products	Retail & Wholesale	600	5.66	5.00
Manufacture of pharmaceutical preparations	Life Sciences	1,625	5.40	-0.59
Activities of call centres	Professional Business Services	2,500	4.43	2.77
Manufacture of builders' ware of plastic	Manufacturing	1,625	4.40	-0.34
Service activities incidental to water transportation	Ports and Logistics	900	4.00	0.44
Manufacture of metal structures and parts of structures	Manufacturing	1,500	3.68	-1.91





Advanced Manufacturing
 Digital and Creative
 Ports and Logistics
 Agri-Food
 Life Sciences
 Manufacturing
 Retail & Wholesale



# Industrial Strategy Sector (IS-8) Performance

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## The Industrial Strategy sectors

Hull and East Yorkshire's Industrial Strategy sectors are high-value but under-represented, with employment declining despite strong productivity.

This section considers the eight Industrial Strategy sectors (IS-8), defined by the Department for Business and Trade, except for clean energy industries where we have applied our own definition. These sectors are important because they capture areas of the economy that are seen as nationally significant for productivity, innovation, and long-term growth potential.

In Hull and East Yorkshire, the IS-8 collectively employ around 52,900 people, accounting for just under a fifth of total employment. Over the past five years, employment in these sectors has declined slightly (-0.7% CAGR), contrasting with modest growth in other industries. Business counts have also contracted slightly, while GVA has grown only slowly.

Concentration levels tell a more mixed story: the IS-8 sectors overall show an average concentration index of 0.73, below parity with the national economy, and this has been falling in recent years (-1.9% concentration growth). This indicates that Hull and East Yorkshire are currently under-represented in these nationally strategic industries relative to other parts of the UK.

Industrial Strategy sector	Employment 2023	Employment CAGR	Businesses 2023	Businesses CAGR		GVA CAGR		Productivity CAGR	Average concentration 2023	Average concentration growth
IS8 Total	52,885	-0.72 %	4,865	-0.8%	£3,528	0.44 %	£66,705	1.2%	0.73	-1.9%
Other Industries	215,645	0.94 %	15,440	0.9%	£11,918	1.29 %	£55,268	0.3%	1.12	-1.2%
Total	268,530	0.60 %	20,305	0.5%	£15,446	1.09 %	£57,521	0.5%	1.00	0.0%

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### A strong concentration in four IS-8 sectors

Hull and East Yorkshire shows above-average concentrations in **four of the eight Industrial Strategy sectors**. These sectors are smaller in overall employment terms, but they are areas where the region has a distinctive competitive strength compared to the national economy. Advanced Manufacturing and Clean Energy are the standout sectors, combining high concentration with strong productivity, while Defence (though very small in employment) shows an exceptional degree of local specialisation.

By contrast, large employing sectors such as Professional Business Services and Digital & Technologies remain under-represented locally, despite their national significance. Hull and East Yorkshire's IS-8 strengths lie in smaller, more specialised industries, while some of the larger, knowledge-intensive sectors are less well-developed.

Industrial Strategy sector	Employment 2023	Employment CAGR	Businesses 2023	Businesses CAGR	GVA 2023 (millions)	GVA CAGR	Productivity 2023	Productivity CAGR	Average concentration 2023	Average concentration growth
Advanced Manufacturing	9,450	0.04 %	230	2.8%	£746	-0.98 %	£78,944	-1.0%	1.68	11.5%
Clean Energy Industries	4,040	4.00 %	165	4.9%	£401	-0.30 %	£99,231	-4.1%	1.44	16.6%
Creative Industries	4,555	-5.25 %	980	-0.7%	£274	0.43 %	£60,077	6.0%	0.42	-13.5%
Defence	185	2.95 %	5	0.0%	£13	4.85 %	£70,352	1.8%	16.62	23.1%
Digital and Technologies	9,245	-1.47 %	1,330	-2.0%	£546	5.24 %	£59,055	6.8%	0.56	-2.8%
Financial Services	2,565	2.34 %	315	0.6%	£264	-0.30 %	£102,924	-2.6%	0.51	3.5%
Life Sciences	1,930	-0.66 %	20	-10.6%	£291	-0.15 %	£150,587	0.5%	1.27	-32.8%
Professional Business Services	28,735	-1.81 %	3,280	-1.3%	£1,395 Page 161 of 20	0.06 %	£48,532	1.9%	0.75	-6.0%

# Defence has seen a large growth

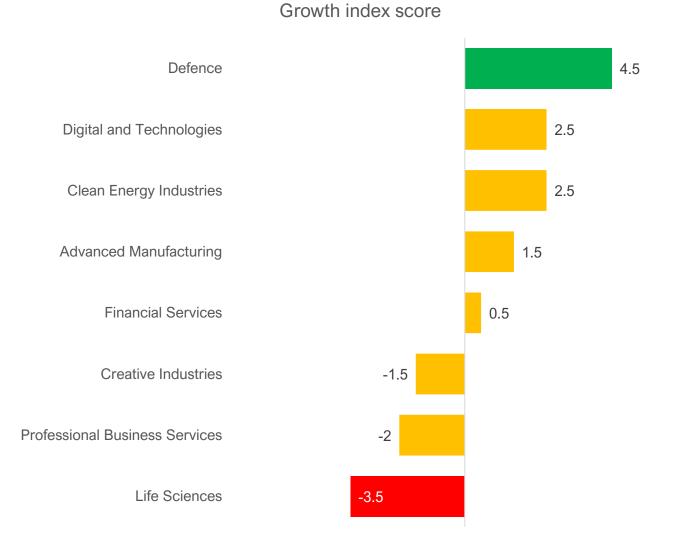
Defence has seen the strongest growth among IS-8 sectors

This page shows the growth index for each of the IS-8 industries.

This chart presents the growth index for each of the Industrial Strategy sectors. It highlights significant variation in performance across the IS-8 in Hull and East Yorkshire.

Defence has grown strongly, reflecting rapid expansion from a small base. Digital and Technologies, Clean Energy, and Advanced Manufacturing have also recorded positive growth, indicating areas of emerging strength.

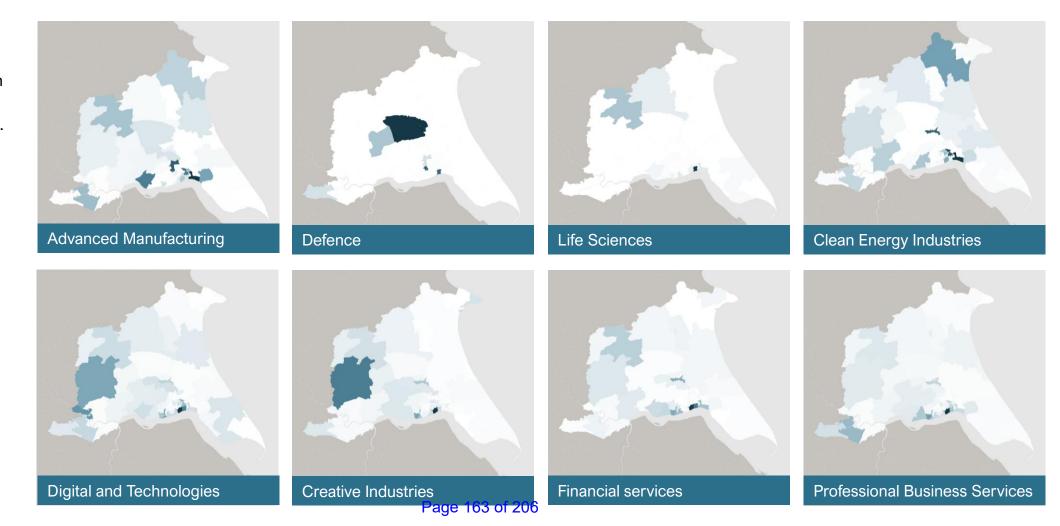
In contrast, Life Sciences, Professional Business Services, and Creative Industries have all contracted, with Life Sciences showing the sharpest decline. This suggests challenges in retaining competitiveness in some nationally significant industries.



### Spatial distribution varies across the IS-8 sectors

These maps show the spatial distribution of each IS-8 sector in Hull and East Yorkshire.

The maps show where sectors are distributed across the region, and where they are present in more concentrated pockets.



## Strong concentrations in clean energy industries

Specialisation is clearest in clean energy and advanced manufacturing, while service-based industrial strategy sectors are under-represented as a share of the total.

#### IS-8 performance – all locations

Industrial strategy sector	Count	Location quotient
Clean Energy Industries	267	1.55
Advanced Manufacturing	647	1.48
Life Sciences	266	1.19
Professional and Business Service	3758	1.1
Financial Services	448	0.82
Creative Industries	1886	0.78
Digital and Technologies	230	0.78
Defence	24	0.75

#### IS-8 performance – registered address

Count	Location quotient
464	1.58
163	1.41
2467	1.08
1436	0.89
133	0.89
154	0.78
13	0.61
211	0.58
	464 163 2467 1436 133 154 13

#### IS-8 performance – operating locations

Industrial strategy sector	Count	Location quotient
Clean Energy Industries	136	1.7
Life Sciences	156	1.5
Advanced Manufacturing	258	1.27
Professional and Business Service	1814	1.14
Financial Services	270	1.06
Digital and Technologies	111	0.81
Defence	12	0.81
Creative Industries	745	0.67

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### **Innovation and Trade**

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## **Innovation Economy Strengths**

The tables below show Hull & East Yorkshire's RTICs (Real Time Industrial Classification), with sectors colour-coded by their Location Quotient (LQ) rank as measured by the DataCity. Green highlights comparative advantages (LQ > 1.25), yellow marks emerging specialisms (LQ 0.8–1.25), and red indicates areas currently underspecialised (LQ < 0.8).

Hull & East Yorkshire hold comparative advantages in sectors such as Modular Construction, Agri-Tech, and Marine & Maritime. Alongside these strengths, there is a broad range of emerging specialisms, including Advanced Manufacturing, Energy Storage, and B2B Services. By contrast, many frontier and digital industries such as Al, AdTech, E-Commerce, and Life Sciences currently show no local concentration.

#### **HEYCA's RTICs Colour Coded by LQ Rank**

Modular Construction	1
AgriTech	2
Marine and Maritime	3
Land Remediation	4
Quantum Technology	5
FoodTech	6
Neurotechnology	7
Battery Supply Chain	8
Energy Management	9
Supply Chain Logistics	10
Advanced Materials	11
Energy Generation	12
CleanTech	13
Net Zero	14
Telecommunications	15
Defence	16
Robotics and Autonomous systems	17
Design and Modelling Technologies	18
MedTech	19
Life Sciences	20
FinTech	21
Cloud Computing	22
Electronics Manufacturing	23
Media and Publishing	24
Rehabilitation	25

Advanced Manufacturing	2					
Research and Consulting - Physical Sciences and						
Engineering	2					
Energy Storage	2					
B2B Services	2					
Sports And Physical Activities	2					
Wearables and Quantified Self	3					
Sensors	3					
Software Development	3					
Internet of Things	3					
Data Infrastructure	3.					
Geospatial Economy	3					
Digital Creative Industries	3					
Under specialised (LQ 0 – 0.8)						

No significant specialism (LQ 0.8 – 1.25) **Comparative Advantage (LQ > 1.25)** Page 166 of 206

Agency Market	36
AdTech	37
Streaming Economy	38
E-Commerce	39
Quantum Economy	40
Artificial Intelligence Ecosystem	41
EdTech	42
Pharma	43
Advanced Screens	44
Immersive Technologies	45
Software as a Service (SaaS)	46
ESG	47
Gaming	48
•	49
Space Economy Samisandustara	50
Semiconductors Omics	51
	52
Computer Hardware	
Artificial Intelligence Technologies and Applications	53
Cryptocurrency Economy	54
Biopharmaceutical	55
Engineering Biology Application	56

## Innovation Economy Strengths: Zoomed In

The table below presents the 20 most specialised sub-RTICs in Hull & East Yorkshire, ranked by Location Quotient (LQ) using Data City analysis. This highlights which sectors and sub-sectors show the strongest concentration locally.

**High Ranking:** Modular Construction dominates as a leading innovation strength, with multiple ranked sub-specialisms.

Other strong areas: Robotics & Autonomous Systems, Advanced Materials, MedTech, FinTech, AgriTech, and Marine & Maritime also demonstrate strong specialisms.

Energy-linked specialisms: Offshore Wind, Energy Storage, and FoodTech emerge as further areas of opportunity.

#### 20 top specialised sub-RTICs

Rank	Sector	Sub Sector
1	Modular Construction	Off site construction
2	Modular Construction	Permanent Modular Buildings
3	Robotics and Autonomous systems	Vertical Farming
4	Modular Construction	Supply Chain
5	Advanced Materials	Polymers
6	MedTech	Photonics
7	Marine and Maritime	Port Ecosystem
8	FinTech	Digital Capital Raising
9	AgriTech	Vertical Farming
10	Marine and Maritime	Shipping - Container, bulk, RoRo, tanker

Rank	Sector	Sub Sector			
11	AgriTech	Precision Farming			
12	AgriTech	AgSciences			
13	Energy Generation	Offshore Wind			
14	FoodTech	Food Processing			
15	CleanTech	Adapted Goods			
16	Electronics Manufacturing	Electromedical technologies			
17	Marine and Maritime	Shipping - Workboats			
18	FoodTech	Agri Tech			
19	Energy Storage	Thermal			
20	AgriTech	Drone Technology			

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### **Sectoral Trends: Trade**

Hull Port recorded £1,489m of exports in 2025, and imports valued at £10,237m. While this data does not tell us where goods have been produced in the UK looking at the top commodities, we see strong alignment with local sector strengths. High levels of exports across Agri-Food exports are a key strength, with large volumes of products such as milling goods, oils & fats, and edible preparations exported. Manufacturing exports are also central to the port, including machinery, vehicles, plastics, iron & steel, and a range of chemical products while emerging sectors like clean energy and digital also feature.

#### Top 20 commodities by Value in Hull in July 2025

	Potential Related sector	Total Value Exported in July 2025
84 Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	Adv man	£30,056,467
29 Organic chemicals	Clean energy	£25,501,642
39 Plastics and plastic products	Manufacturing	£14,977,014
87 Vehicles other than railway or tramway rolling-stock	Manufacturing	£13,718,779
22 Beverages, spirits and vinegar	Agri-food	£12,717,226
38 Miscellaneous chemical products	Manufacturing	£11,592,247
72 Iron and steel	Manufacturing	£9,011,330
33 Essential oils and resinoids; perfumery, cosmetic or toilet preparations	Adv man	£8,258,374
88 Aircraft, spacecraft, and parts thereof	Adv man	£7,097,150
21 Miscellaneous edible preparations	Agri-food	£6,493,556
85 Electrical machinery and equipment and parts thereof	Adv man	£6,204,548
15 Animal or vegetable fats and oils and their cleavage products	Agri-food	£5,740,298
11 Products of the milling industry; malt; starches; inulin; wheat gluten	Agri-food	£5,156,210
34 Soaps, organic surface-active agents, washing preparations	Adv man	£4,259,854
73 Articles of iron or steel	Manufacturing	£3,400,836
90 Optical, photographic, cinematographic, measuring, checking	Digital / creative	£3,235,868
83 Miscellaneous articles of base metal	Manufacturing	£3,172,989
30 Pharmaceutical products	Life sciences	£3,132,101
57 Carpets and other textile floor coverings	Manufacturing	£2,343,164
74 Copper and articles thereof	Manufacturing	£2,044,247

Advanced ManufacturingDigital and CreativeAgri-FoodLife Sciences

Ports and Logistics
 Professional Business Services
 Retail & Wholesale

Clean Energy

Manufacturing

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### **Sectoral Trends: Trade**

Taking the top commodities by the value, we can see the goods where Hull exports a large amount are commodities linked to agri-food and manufacturing, important regional sectors in both size and concentration.

Top 20 commodities by LQ in Hull in July 2025

	Potential Related Sector	Total value exported in July 2025
11 Products of the milling industry; malt; starches; inulin; wheat gluten	Agri-Food	£5,156,210
57 Carpets and other textile floor coverings	Manufacturing	£2,343,164
15 Animal or vegetable fats and oils and their cleavage products	Agri-Food	£5,740,298
29 Organic chemicals	Manufacturing	£25,501,642
06 Live trees and other plants; bulbs, roots and the like	Agri-Food	£159,609
83 Miscellaneous articles of base metal	Manufacturing	£3,172,989
21 Miscellaneous edible preparations	Manufacturing	£6,493,556
38 Miscellaneous chemical products	Manufacturing	£11,592,247
34 Soaps, organic surface-active agents, washing preparations	Manufacturing	£4,259,854
20 Preparations of vegetables, fruit, nuts or other parts of plants	Agri-Food	£877,625
72 Iron and steel	Manufacturing	£9,011,330
70 Glass and glassware	Manufacturing	£1,690,121
33 Essential oils and resinoids; perfumery, cosmetic or toilet preparations	Manufacturing	£8,258,374
39 Plastics and plastic products	Manufacturing	£14,977,014
22 Beverages, spirits and vinegar	Agri-Food	£12,717,226
13 Lacs; gums, resins and other vegetable saps and extracts	Manufacturing	£133,649
54 Man-made filaments	Manufacturing	£485,839
47 Pulp of wood or of other fibrous cellulosic material	Manufacturing	£564,363
74 Copper and articles thereof	Manufacturing	£2,044,247
18 Cocoa and cocoa preparations	Agri-Food	£1,178,540

- Advanced Manufacturing
- Digital and Creative
- Ports and Logistics

Agri-Food

Clean Energy

Life Sciences

- Manufacturing
- Professional Business Services
   Retail & Wholesale

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## **Businesses receiving investment**

The tables show the number of equity fundraisings by businesses in Hull and East Yorkshire by sectors.

Investment is flowing into a diverse range of sectors, with Professional Business Services and Digital & Technologies leading in overall business count.

Life Sciences and Digital Manufacturing stand out with the highest share of sector businesses receiving funding, while Financial Services and Clean Energy also attract notable investment.

Emerging trends highlight strong activity in digital technologies, SaaS, mobile apps, and artificial intelligence, alongside growing interest in areas such as CleanTech, eHealth, and blockchain.

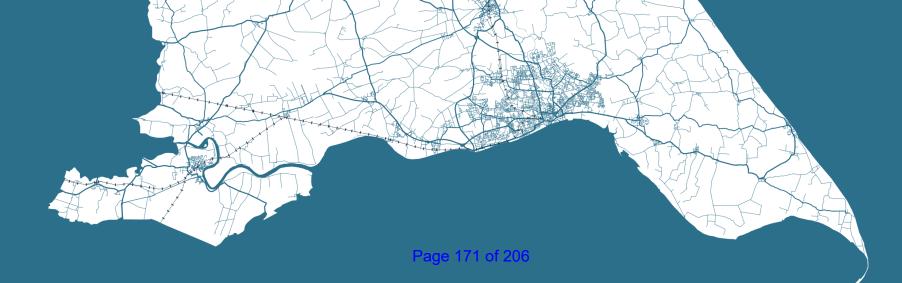
This mix reflects both the strength of established industries and the rise of innovative, future-focused businesses.

Sector	Business count	Share of businesses
Professional Business Services	26	1.0%
Digital and Technologies	20	1.7%
Retail & Wholesale	12	0.4%
Financial Services	11	3.5%
Leisure & Hospitality	8	0.4%
Life Sciences	5	25.0%
Other Services	4	0.3%
Agri-Food	4	0.2%
Health and Social Care	3	0.4%
Utilities	3	2.3%
Digital and Creative	2	1.0%
Clean Energy	2	3.3%
Digital Manufacturing	2	10.0%
Advanced Manufacturing	1	0.5%
Education	1	0.3%
Public Administration	1	0.8%
Construction	1	0.0%

Beauhurst Buzzwordheadquarters receiving fundingDigital and technologies26Professional and business services23Creative industries9Software-as-a-Service (SaaS)9Mobile apps8Subscription8Financial services5Artificial Intelligence5CleanTech5Clean energy4Life sciences3Electric and hybrid vehicles3eHealth3Internet of Things2Virtual reality2Cloud computing2HRTech2RegTech2Omni-channel retailing13D printing1Regenerative medicine1Blockchain1Crypto-currencies1Gamification1Sharing economy1Advanced manufacturing1The quantified self1Wearables1ConTech1PropTech1Ethical shopping1AgriTech1Vegan/vegetarian1CollabTech1		Number of				
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Professional and business services  Creative industries  Software-as-a-Service (SaaS)  Mobile apps  Subscription  Financial services  Artificial Intelligence  CleanTech  Clean energy  Life sciences  Belectric and hybrid vehicles  eHealth  Internet of Things  Virtual reality  Cloud computing  HRTech  RegTech  Omni-channel retailing  AgriTech  The quantified self  Wearables  ConTech  PropTech  Ethical shopping  AgriTech  Vegan/vegetarian  Chatbots  9  23  24  25  9  Mobile apps  8  8  8  8  8  8  8  9  9  8  8  8  8		funding				
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### **Suggested Priority Sectors**

The following section sets out our suggested priority sectors for the Local Growth Plan, and the rationale for including this. For each of the five sectors we have included a map showing both the distribution of businesses and the businesses among these which are engaged in emerging economy activity.



### Methodology for sector selection

This report sets out a headline analysis of all sectors across Hull and East Yorkshire. In order to determine key growth opportunities in the region we have assessed a variety of indicators: size, value, specialism, growth trends, and any additional factors such as equity investment or commodities trade out of the port in Hull.

**Size:** We considered the employment size of each sector, as larger sectors account for a significant portion of the local economy and workforce. This helps identify where interventions could have the greatest impact.

**Value:** We assessed the contribution of each sector to Gross Value Added (GVA), which highlights the sectors generating the highest levels of economic output and productivity. Both national datasets (ONS) and emerging economy activities (DataCity) were used to provide a comprehensive picture.

**Specialism:** We analysed Hull and East Yorkshire's sectoral specialisms using location quotient analysis, which compares the concentration of employment in a sector locally with the national average. This highlights the unique strengths of the local economy and the industries in which it is particularly competitive.

**Growth trends:** We examined historic growth across a variety of measures over the last five years, aggregated using our bespoke growth index tool. This enables us to identify both fast-growing, emerging sectors and more mature sectors with stable long-term growth trajectories. Employment, business counts, GVA and GVA per worker are used to understand the trajectory of sectors, and what they mean for the opportunities in Hull and East Yorkshire (or indeed the imperatives to try to intervene and reverse negative trends)

**Additional factors:** Finally, we considered a range of qualitative and strategic factors: trade flows through the port, levels of business fundraising and equity investment, innovation activity, geography, and heritage assets. Together these provide context for how different sectors are positioned for future development.

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## Hull and East Yorkshire's LGP sector opportunities

Agri-fo	Agri-food & Agri-tech			Energy		Life Sciences		Manufacturing		g	Port and Logistics		ics	
Employment 16,800	Business 1,900	Value £53,800	Employment 2,700	Business 75	Value £76,300	Employment 2,000	Business 15	Value £150,000	Employment 25,000	Business 1,100	Value £87,000	Employment 6,600	Business 725	Value £45,300
counts. This a concentration the concentration businesses the concentration supply manufact productivity is averages, businesses that and GVA. The from geograph	Though not a high-employing sector, the sector is highly productive, contributing more to GVA per worker than other sectors. The sector also has a high concentration sexist across the full supply chain, especially manufacturing. The sector's oductivity is equivalent to national averages, but growth has been trong, particularly to employment and GVA. The sector also benefits m geography and access to global markets through the port.  Though not a high-employing sector, the sector, the sector is highly productive, contributing more to GVA per worker. The region has a strong specialism in the manufacture of pharmaceutical products. However, the life sciences sector has seen the number of businesses decrease significantly, dominated by fewer large firms. As one of eight key sectors outlined in the industrial strategy, the region's specialism can bring investment, with some evidence of businesses receiving funding in the last five years.		accounting employmen compared to also more vi Yorkshire th high GVA centred ar sectors, with a showing sp growth tre advanced man	Yorkshire's edfor a high shatt, businesses nationally. The lauable in Hulan other regiper job. Activity ound one or broad range pecialisms an ends. As defendacturing a	conomy, are of total and GVA he sector is and East ons, with a rity is not two sub- e of activities d varying nce and re a national investment	specialisms in strong opports Though less sectors, it is n billions of pour imports pass annually, den significant stagnant in re	advantage in geographica amber and remproduction unity to grow ationally signates worth of sing through nonstrating toe. Growth h	n ports and advantage egional provides a this sector. than other nificant, with exports and Hull's port the national as been so there is a						
Size Val	LQ	Growth	Size Va	I LQ	Growth	Size Va Paç	ge 173 of 2	Growth 2 <b>06</b>	Size Va	l LQ	Growth	Size Va	LQ	Growth

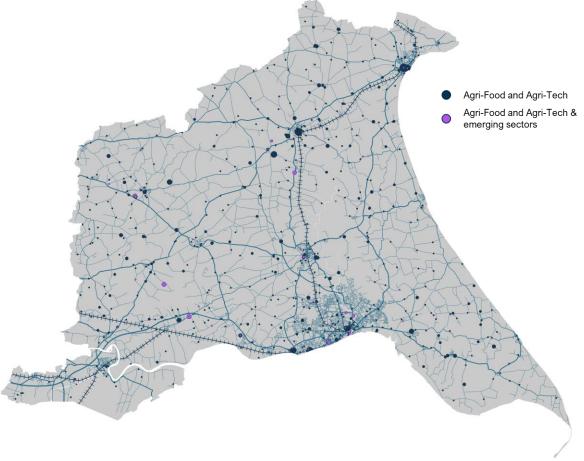
# **Agri-food and Agri-Tech**

The agri-food sector is a large sector in Hull and East Yorkshire, accounting for a high share of the regions employment and businesses.

This sector encompasses the entire food supply chain, from agricultural activities (including farming and fishing) to food manufacturing and the production of agri-food related machinery. The sector also includes food-tech and agri-tech in the emerging economy, providing innovative technologies to support crop and food production.

Many large companies are headquartered in Hull and East Yorkshire, including **Cranswick** and **William Jackson Food Group**. Headquartered in Pocklington, Yara is a leader in Agri-tech, specialising in creating effective.

This map shows that the sector operates throughout Hull and East Yorkshire, with emerging economy activities more concentrated around Hull and to the west of the East Riding.



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# Agri-tech and Agri-food performance in HEYCA

This report finds that agri-food and agri-tech is a distinctive strength in Hull and East Yorkshire with clear growth opportunities.

**Size:** Agri-food is a large employer in Hull and East Yorkshire with high business counts across the full supply chain. Employment is particularly high in food production and manufacturing, whilst many businesses are in agriculture.

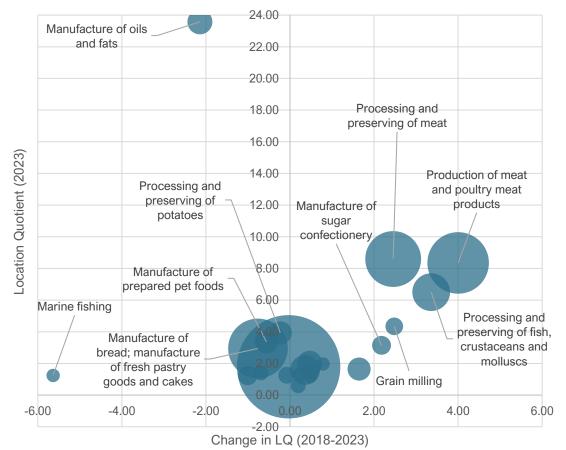
**Value:** The large size of the sector also translates to a higher share of GVA of the total economy. Whilst productivity in Hull and East Yorkshire is generally lower across sectors, agri-food matches the national average

**Specialism:** The agri-food sector has more than double the concentration of employment and businesses in Hull and East Yorkshire than nationally. The bubble chart shows particularly high employment specialisms in food production. Both emerging economy sectors of agri-tech and food-tech also have a high concentration of businesses in the region.

**Growth trends:** The sector shows signs of strong growth, particularly in employment and GVA, as shown by manufacturing in the bubble chart.

**Additional factors:** Geographical factors such as a lower population density and a long coastline, allow for this sector to grow. A high proportion of goods exported out of Hull port are often products of the agri-food sector.

Sub-sector specialisms in agri-food\*



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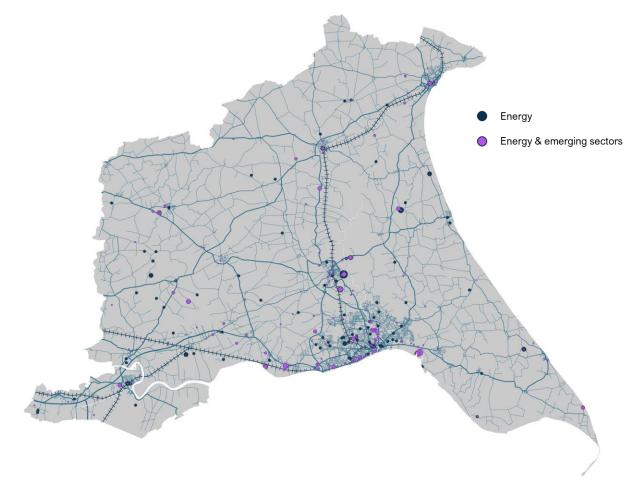
## **Energy**

The energy sector in Hull and East Yorkshire is a valuable and growing sector in the region, with clean energy activities aligning with national objectives.

The Humber itself is known as the 'Energy Estuary' due to its existing pool of energy businesses, including in Hull and East Yorkshire. This sector relates to all activities in the energy generation supply chain, from the extraction and manufacturing of fuels to the production and transmission of electricity.

Many large players in this industry operate in the energy sector, including the global headquarters for **Croda** in Goole or **Siemens Gamesa** in Alexandra Dock at Hull. **Saltend Chemicals Park**, owner **by PX Group**, is also located just off the Humber to the East of Hull. It is home to some of the world's leading blue-chip manufacturing, chemicals and renewable energy businesses.

The map shows that clean energy activities occur across Hull and East Yorkshire, but notable clusters are forming along the Humber and by Beverley.



Note:

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## **Energy sector performance in HEYCA**

The high-value energy sector has a comparative advantage in Hull and East Yorkshire, with strong growth prospects.

**Size:** The energy sector alone is relatively small in comparison to others with fewer, larger businesses than the typical sector in Hull and East Yorkshire. DataCity finds many businesses operating in clean energy industries.

**Value:** Electricity production is a high-value sector in Hull and East Yorkshire. Sectors related to clean energy industries often have a GVA per job exceeding £100,000 in Hull and East Yorkshire.

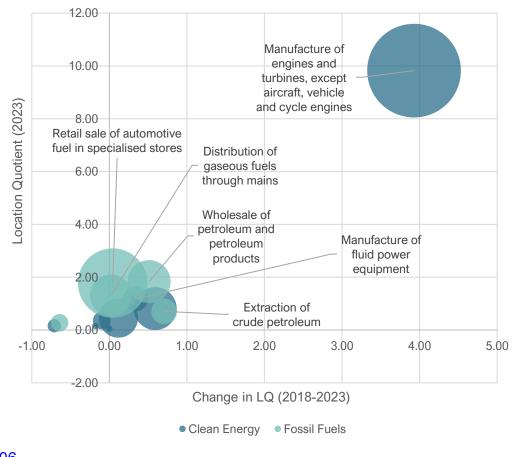
**Specialism:** Hull and East Yorkshire have a strong concentration of employment and businesses in the Clean Energy Industries IS-8 sector. The bubble chart indicates a strength in engine and turbine manufacturing in the supply chain. DataCity also identifies strong concentrations in energy RTICs, CleanTech and Batteries.

**Growth trends:** The clean energy sector is one of the fastest-growing sectors in Hull and East Yorkshire. However, growth can be observed across various activities, as well as in size, value, and specialisation metrics.

**Additional factors:** Low population density and access to the North Sea provides a firm grounding to grow the energy sector. Alignment with the industrial strategy can encourage investment, with some evidence suggesting businesses in this sector have already starting to receive funding in the last five years.

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#### Energy sub-sector specialisms



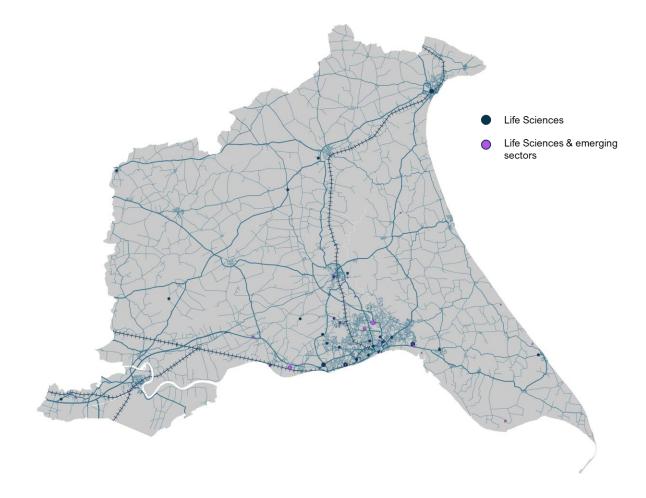
### Life Sciences

Life Sciences is one of the most productive sectors in Hull and East Yorkshire, and accounts for a large part of equity investment coming into the region.

The sector includes companies and organisations involved in research, manufacturing, human health, biology, biotechnology and chemistry. In Hull and East Yorkshire, a significant amount of activity stems from life sciences manufacturing, including pharmaceuticals and MedTech.

Large life sciences companies headquartered in Hull and East Yorkshire such as GMP manufacturing who specialise in contract manufacturing, filling and packaging solutions for Biocides, Pharmaceuticals, Cosmetics and Healthcare products. Other notable firms are Indivoir who manufacture medicines to support treatment of opioid use disorder and Smith and Nephew, a large supplier in MedTech.

Life Science activities occur across the region, with significant clustering around Hull, and some manufacturing activity around East Riding of Yorkshire.



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### Life Sciences sector performance in HEYCA

The life sciences sector is a high value sector, with strong investment opportunities, but growth trends are concerning.

**Size:** Life Sciences is a relatively small sector in terms of employment and business counts, with just under 2,000 workers and 20 businesses using the DBT Industrial Strategy sector definition. However, the wider health and social care sector is one of the largest in the region, employing 37,000 people.

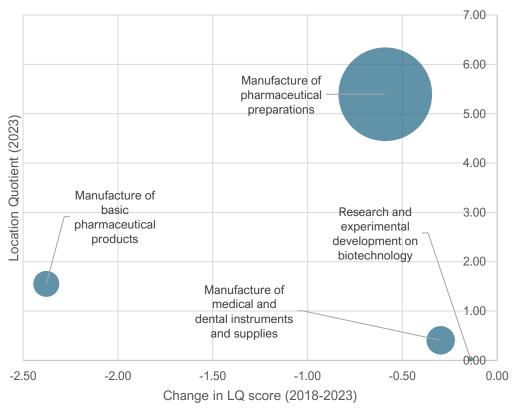
**Value:** Life Sciences has an especially high GVA per job at £150,000.

**Specialism:** The life sciences sector has a high concentration of employment in Hull and East Yorkshire, in particular, pharmaceutical manufacturing have high employment LQs, as shown in the bubble chart. DataCity also shows a high share of businesses in Neurotechnology, MedTech and Life Sciences.

**Growth trends:** Growth trends in life sciences are a concern. In particular, the number of businesses fell from 35 to 20 across five years. Employment has only seen a slight decline, suggesting that it is SMEs decreasing. However, with the sector growing nationally, specialism has fallen, as shown by each subsector showing a decrease to the employment LQ in the bubble chart.

**Additional factors:** Alignment with the industrial strategy sectors can encourage investment to Hull and East Yorkshire. Businesses in life sciences have also received some of the most investment in the last five years. Page 179 of 206

#### Life sciences sub-sector employment LQs



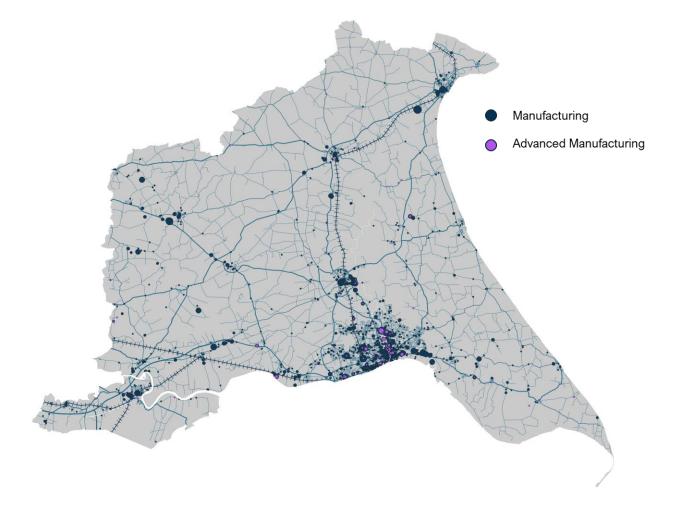
### Manufacturing

Manufacturing is central to Hull and East Yorkshire's economy and identity. The region has significant specialisms across many different activities within manufacturing and engineering.

The sector includes all types of manufacturing activity. Including simpler manufacturing such as textiles and basic metals through to advanced products like machinery, vehicles, chemicals, and electrical equipment. A key focus for this sector is to transition towards more advanced manufacturing in terms of using more innovative processes in production, such as the use of digital infrastructure and automation.

Some of the largest manufacturing companies are in the manufacture of caravans such as Swift Group or ABI. Another strength is in manufacturing for defence with companies like Gamebore cartridges based in the region. Advanced Plastics is another company within the advanced manufacturing definition.

Due to the size and specialism of the sector, the map shows that manufacturing activity happens all across Hull and East Yorkshire.



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# Manufacturing performance in HEYCA

Manufacturing reflects a large portion of the region's economy, with specialisms across a variety of activities.

**Size:** A large employer in Hull and East Yorkshire, accounting for 15% of employment, double the share in Great Britain. Excluding food production, there are around 17,000 workers employed in manufacturing and an additional 8,000 workers manufacturing more advanced products, though businesses are generally larger in this sector.

**Value:** Manufacturing has an average GVA per job in Hull and East Yorkshire of £87,000, slightly higher than the Great Britain average, despite the region being less productive in most other sectors against GB.

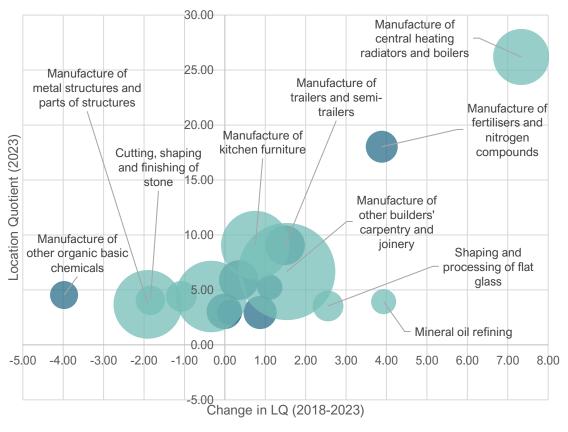
**Specialism:** There is around double the concentration of activities in both advanced and basic manufacturing in Hull and East Yorkshire. Some very specialised activities include defence and caravan manufacturing, but the bubble chart shows many large sub-sectors with high employment LQs.

**Growth trends:** The sector has not seen any significant growth or decline in five years. However, some sub-sectors like defence have seen large growth to employment and GVA.

Additional factors: A lot of commodities exported out of Hull port align with some of the manufacturing activities in the region.

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## Top specialised manufacturing sub-sectors\*



Manufacturing

Advanced Manufacturing

## **Ports and Logistics**

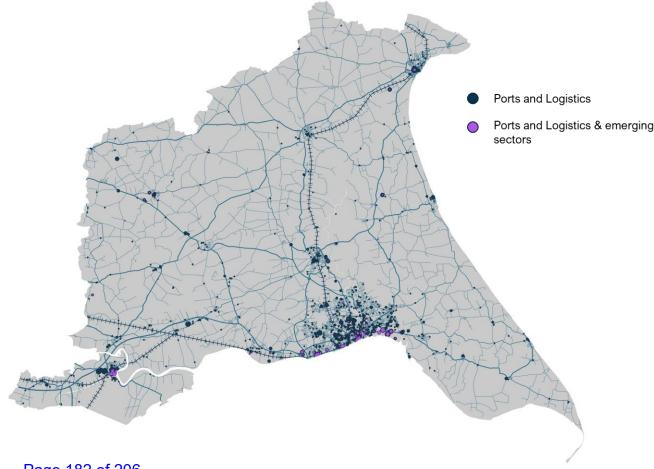
Through the natural endowment of its geography, Hull and East Yorkshire has a comparative advantage in marine and maritime sectors, especially for ports and logistics.

The ports and logistics sector includes all activities related to maritime logistics. It also includes additional activities complimentary to the maritime sector such as the construction and maintenance of ships and other floating structures.

As expected, there are several maritime logistics companies that are based in Hull and East Yorkshire, especially by the port. This includes companies such as:

- Global Shipping Services
- Boluda Towage.
- Den Hartogh Dry Bulk Logistics which specialises in handling chemical, gas, dry bulk and liquid food.

Ship repair companies are also headquartered in Hull, such as MMS and Dunstons. This sector has activity across the full region, but most activity happens along the Humber, particularly by the port in Hull.



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# Ports and Logistics performance in HEYCA

**Size:** Ports and Logistics accounts for a reasonable share of employment in Hull and East Yorkshire of over 6,600 workers and 725 businesses.

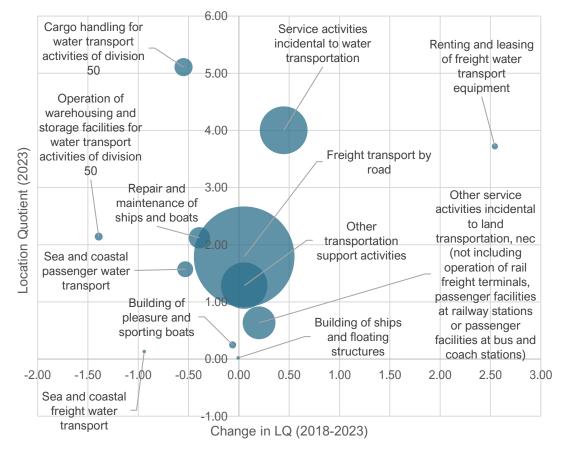
**Value:** The value of the ports and logistics sector in Hull and East Yorkshire is weaker compared to other sectors. Its GVA per job is £45,300 on average. However, the industry is valuable nationally and is important to support trade in the region. In 2024, the total value of exports out of Hull was £3.2bn, and a total import value of £18.1bn.

**Specialism:** Hull and East Yorkshire has a strong specialism in ports and logistics, with a concentration of employment and businesses nearly 50% higher than the national average.

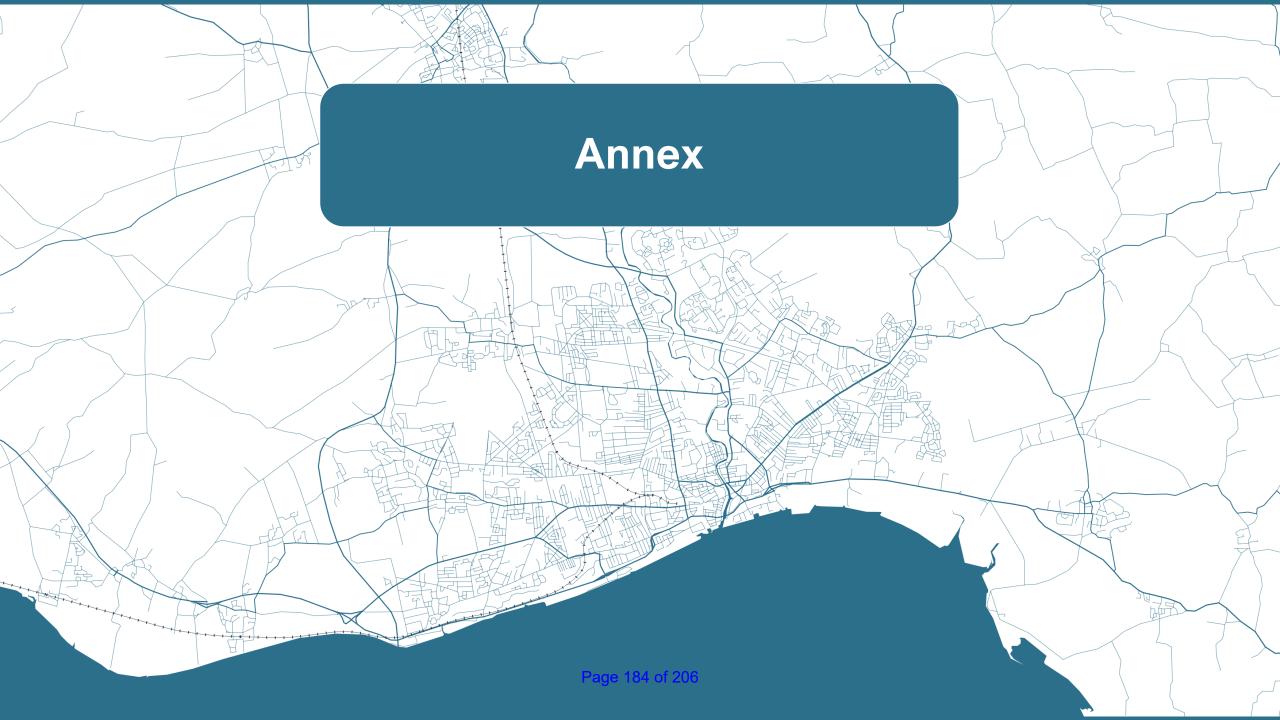
**Growth trends:** There have not been any significant changes in the ports and logistics sector. There has been slight increases to size, but a slight decline to GVA and productivity. However, the wider transport and logistics sector, unrelated to maritime have seen significant declines to GVA and productivity.

**Additional factors:** Hull and East Yorkshire's geography and industrial heritage provides a strong opportunity to grow the ports and logistics sector.

## Ports and Logistics sub-sector employment LQs



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# **Explaining the Data City**

We have used Data City data to understand Hull and East Yorkshire's strengths in the emerging economy and within sectors that may not be well-represented by SIC codes.

Much of the analysis completed has used data from the ONS to determine activity in each sector. The ONS uses the Standard Industrial Classification of Economic Activities (SIC) codes to define sectors. The sectors analysed were grouped by 5-digit SIC codes, the most granular sector level. However, the traditional SIC codes used by national statistics are often considered outdated and do not accurately reflect sectors developing new and emerging technologies, as they were last updated in 2007.

Data City is an online platform used to gather broader insights into business activity, focusing on emerging and innovative sectors. The platform uses an alternative to SIC-codes called 'Real Time Industrial Classifications' (or RTICs). These new-tech sector groupings are identified via web scraping and machine learning technology, through analysing text on businesses' websites to understand the activity and sectors they are involved in based on keywords and business demography. The platform only analyses the companies listed on Companies House that also have a website. This means that sole proprietors or micro companies with no website are often not reflected. In total, over 4.5 million companies and nearly 500 sectors (RTICs) and sub-sectors (sub-RTICs) are analysed in the UK.

However, insights deriving from the Data City do come with some caveats. As the platform utilises machine learning technology, some additional businesses may be selected while others may be overlooked. This is particularly the case when analysing some firms in the 'Net Zero' RTIC, as some companies may claim to use sustainable practices, but not necessarily in the Net Zero sector. Therefore, analysis should be conducted by examining relative strengths, rather than relying solely on absolute figures. The Data City is also best used to analyse business counts, as employee and turnover figures are estimated based on a sample of businesses.

This analysis uses the Data City to look beyond traditional sector classifications and understand where there are strong concentrations in emerging economy activities.

The Data City also produce their own definitions for the eight Industrial Strategy Sectors, using both a combination of traditional SIC codes and their own RTICs to capture more innovative sectors like clean energy industries, defence, digital and technologies, and life sciences.

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Report to the HEYCA Business Board

6 November 2025

### Hull & East Yorkshire Local Get Britain Working Plan - Edition 1

## Report of the Strategic Programme Lead - Employability & Health

#### **Report Status:**

This item is not exempt

Therefore exempt reasons are not applicable

#### Guidance:

The public may be excluded from meetings whenever it is likely in view of the nature of the business to be transacted or the nature of the proceedings that exempt information would be disclosed.

You must specify the reasons why the public interest in disclosing the contents.

~

A Committee can determine to open your report to the public if it believes that the public interest test is not met.

This is a non-key decision.

Insert the Forward Plan reference number (delete this section if not applicable)

## 1. Purpose of the Report and Summary

1.1 The purpose of this report is for HEYCA Business Board to be informed on the development of the Get Hull & East Yorkshire Working Plan.

## 2. Recommendations

- 2.1 It is recommended that the HEYCA Business Board:
  - a) Notes the contents of this report

### 3. Reasons for Recommendations

3.1 HEYCA are required by government to produce a LGBWP by the end of September 2025. Due to the circumstances and timing pertaining the setting up and staffing of the Hull and East Yorkshire Combined Authority an extension has been provided to HEYCA until mid-November 2025 to publish its Get Hull and East Yorkshire Working Plan.

### 4. **Background**

4.1 National Policy Context: Local Get Britain Working Plans

As part of the Government's commitment to increase national prosperity and deliver inclusive growth, all areas of England are required to produce a Local Get Britain Working Plan. These local plans form a core element of the Get Britain Working White Paper, which sets out the Government's ambition to achieve an 80 per cent employment rate across the United Kingdom. HEYCA's current employment rate is 74.4% (+/- 2.9% pts) Oct 2024 – Sept 2024.

The purpose of each Local Plan is to develop a comprehensive, whole-system approach to addressing both the supply and demand side challenges within local labour markets. This includes identifying the key barriers that prevent people from accessing, remaining in, or progressing within work, and setting out clear, evidence-based actions to overcome them. Local areas are expected to focus on improving participation, progression, earnings and job quality, while placing particular emphasis on reducing economic inactivity. Over time, the scope of each plan will broaden to reflect evolving labour market needs and emerging local priorities.

Local Get Britain Working Plans are designed to bring together a wide range of stakeholders across public, private and voluntary sectors, ensuring a shared understanding of local challenges and priorities. The planning process should align existing services, identify duplication or gaps, and establish a joint framework for delivery and accountability. Partners are expected to agree how progress will be measured against key outcome indicators, including employment rates, wage growth and participation levels.

In Mayoral Combined Authority areas, Local Get Britain Working Plans should be guided by, and aligned with, the strategic aims of the Local Growth Plan. Across all areas, plans must articulate both a ten-year vision and a set of immediate priorities and actions to be delivered within the next 12 to 24 months. Local areas are encouraged to review and refresh their plans on a regular basis to ensure ongoing relevance and responsiveness to changing labour market conditions.

Each Local Get Britain Working Plan should include:

- A detailed analysis of key local labour market challenges, supported by evidence and data, and agreed collectively by local partners.
- An overview of the existing system of support, setting out the roles and responsibilities of organisations supporting individuals and employers.
- A clear and measurable plan of action, outlining how partners will collaborate to enhance provision, address local priorities, and deliver improved outcomes for residents and businesses.

This national framework ensures that all parts of England are working towards shared objectives while maintaining flexibility for local areas to design solutions that reflect their specific economic, social and demographic circumstances.

LGBWP and Connect to Work - Connect to Work is the first funding pillar received through the national Get Britain Working Strategy. In Hull and East Yorkshire Connect to Work aims to support 3,500 with a health condition, disability of significant barrier to gaining and retaining employment. The region will be in receipt of a c£13m investment over 4 years to achieve this. The programme currently sits with Hull City Council as accountable body, and working with East Riding of Yorkshire Council this programme is at Delivery Planning stage. Close working between Connect to Work and the Local Get Britain Working Plan will be vital to the success of both.

#### 5. **Issues for Consideration**

5.1 Get Hull and East Yorkshire Working Plan Edition 1 –

The Get Hull and East Yorkshire Working Plan is the new Combined Authority's employment and health strategy. It is closely aligned with, and references, the Skills and Work Plan, which is currently in preparation.

This first edition for Hull and East Yorkshire, developed by the new Combined Authority in partnership with the Integrated Care Board,

local councils, Jobcentre Plus, employers and the voluntary, community and social enterprise (VCSE) sector, is structured around three pillars: Pillar 1 – Evidence Base and Concept Model; Pillar 2 – Current System Model; and Pillar 3 – Indicative Priorities and Actions.

Evidence highlights a region of around 631,000 residents with nationally significant strengths in ports, logistics, advanced manufacturing and green energy. However, the area experiences lower productivity and pay than England as a whole, a shrinking working-age population, rising youth NEET rates, skills gaps at Level 4, and high levels of health-related inactivity, particularly long-term sickness. Employment currently stands at 74.4 per cent overall, although this masks variation between areas and a persistent gender gap.

The existing system combines Jobcentre Plus support, council employment hubs, UK Shared Prosperity Fund and Adult Skills Fund provision, Skills Bootcamps and Sector-based Work Academy Programmes (SWAPs), together with targeted initiatives such as Ready to Work and Opportunity Goole. From autumn 2025, the Connect to Work programme will provide supported employment until 2030 for approximately 3,400 residents, using a 'place, train and maintain' model. Priority groups will include care leavers, veterans, refugees and people with health conditions.

Delivery challenges remain. Provision appears fragmented to both residents and employers. Funding streams are time-limited and uncertain beyond 2025/26. Employer conversion from training to sustained job starts is uneven, particularly among small and medium-sized enterprises. Health-to-work pathways are not yet fully integrated with NHS services, and youth transitions lack a coherent ladder from supported internships to apprenticeships and entry-level Bootcamps. Performance reporting also varies across funding bodies, hindering effective evaluation.

This document sets out а practical response. First, to integrate work and health: establish joint governance under the Combined Authority, align commissioning across the Integrated Care Board, councils, the Department for Work and Pensions and providers, and develop shared data systems and triage so that individuals experience a single point of access. Second. to increase participation and earnings: align

employability programmes across both authorities, target devolved skills budgets towards priority sectors, and prepare a Youth Guarantee pilot to reverse the rise in NEET levels. Third, to engage employers: co-design a Good Work Charter, define healthy workplace standards, develop an all-age careers pathway with guaranteed interviews where feasible, and build a unified employer engagement offer to support growth in Freeport, health and care, logistics and advanced manufacturing sectors.

These priorities will be implemented through a long-term plan and 12-month programme of action. Immediate priorities set out in the document include completion of the Local Growth Plan and Skills and Work Strategy; delivery of system-wide roundtables in autumn 2025; publication of a shared health and employment dashboard; and establishment of common referral and sustainment standards. A second edition of this plan will be produced in April 2026 to embed the finalised strategies and funding framework.

Governance of LGBWP - HEYCA will be the accountable body for its LGBWP. A partnership structure for the LGBWP is currently in development which will provides an overarching board to oversee the development and delivery of this strategy. As such this board will be integrated into the emerging committee structure of HEYCA and link closely to the Connect to Work programme which is a key delivery plank of the LGBWP. Indicative membership of this LGBW Board includes LAs, DWP/ Jobcentre Plus, ICB, Public Health Lead, VCSE sector, Local Business rep, Skills rep and HEYCA. DWP require sign off of the LGBWP from the Integrated Care Board and Jobcentre Plus representatives. and any constituent upper-tier or unitary authorities prior to publication.

Next Steps – Upon the adoption of the first edition of the Get Hull and East Riding Working Plan by HEYCA, the ICB and DWP this document will be published on the HEYCA Website. Following this it is recommended that preparation of Edition 2 is commenced which will include the strategic links to Local Growth Plan, Work and Skills Plan and HEYCA Gameplan, once these are finalised alongside a detailed action plan which will be developed over the autumn/winter 2025 with key partners.

#### 6. **Equalities Impact Information**

6.1 Equality, diversity and inclusion are embedded throughout the Get Hull and East Yorkshire Working Plan. The Plan prioritises support for groups who face the greatest barriers to work, including residents with long-term health conditions, unpaid carers, older workers, care-experienced young people, and those with special educational needs or disabilities. Targeted interventions are

designed to address participation gaps — for example, integrated employment and health support for those with chronic conditions.

## 7. Options and Risk Assessment

7.1 The primary risk associated with this strategy is one of meeting the DWP deadlines. HEYCA have secured full time member of staff on a seconded basis in an attempt to mitigate this risk.

## 8. <u>Legal Implications and Statutory Officer Comments</u>

8.1 The Get Hull and East Yorkshire Working Plan has been developed in line with national guidance and within the existing statutory powers of the Combined County Authority.

The proposed English Devolution and Community Empowerment Bill introduces a new statutory basis for Strategic Authorities, including Combined County Authorities, with defined powers over skills and employment support. As these provisions progress, further legal consideration may be required to reflect any new responsibilities or commissioning powers transferred to the area.

### 9. Financial Implications and Statutory Officer comments

9.1 The requirement to produce this Plan does not come with additional funding. However, there is an expectation that existing national funding will align to deliver the objectives and ambitions within the Plan, and that the Plan will guide future conversations with DWP and other Government departments on additional resources, including devolved funds and powers to the area.

The initial delivery of the Get Hull and East Yorkshire Working Plan will be funded through existing resources, including the devolved Adult Skills Fund (ASF), the Connect to Work Programme, and Department for Work and Pensions (DWP) provision delivered through Jobcentre Plus and related employment programmes. Contributions from the UK Shared Prosperity Fund (UKSPF) and other sources will also support delivery this year. The Integrated Care Board (ICB) has identified opportunities to align its workforce and prevention priorities, where it is already investing in integrated health and employment pathways.

These resources provide a strong foundation for early implementation. The Plan will actively align external investment with the HEYCA's priorities, moving funding towards integrated health, skills, and employment models that promote economic inclusion, support young people, and strengthen city, rural and coastal communities. Over time, joint commissioning will enable resources to be pooled around shared priorities rather than fragmented programmes. Ministers have also confirmed that local Get Britain Working Plans will inform future commissioning and the devolution

of adult skills and employment budgets. Successful delivery of this Plan is therefore expected to strengthen the case for more sustainable, multi-year settlements and to align funding with Strategic Plan ambitions, including positive futures for young people, economic inclusion, stronger communities, and local prosperity.

Report of Andrew Hewitt Strategic Programme Lead - Employability & Health

### **Contact Officers:**

Anita Hallbrook – Programme Director – Employability, Health and Communities

Andrew Hewitt - Strategic Programme Lead - Employability & Health

## Officer Interests:

None

**Appendices:** none

## **Background Documents:**

Department for work and Pensions (DWP) published guidance on:

- The development of LGBWP (<u>Guidance for Developing local Get Britain Working plans (England) GOV.UK</u>).
- Get Britain Working outcomes (Get Britain Working outcomes GOV.UK).

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### **Briefing Paper to the HEY Business Board**

### **Energy Security Update**

## 1. Purpose of the Paper and Summary

The HEY-wide energy security, energy resilience, and energy bill reduction function is delivered through partnership with the North East and Yorkshire Net Zero Hub (the Hub), which is funded and directed by the Government's Department of Energy Security and Net Zero (DESNZ).

The objectives of the Hub have shifted in accordance with changing priorities from Government. This will bring new opportunities for the Hull and East Yorkshire Combined Authority, its constituent Authorities, and key partners to engage in energy security and clean power activity at a local, regional, and national level.

The Business Board is asked to reflect upon these changes and provide input into how the Combined Authority and its partners should capitalise on these new opportunities.

## 2. Background

In December 2024, The Business Board received a paper and presentation regarding the purpose and function of the Hub at a regional and local level.

In recent months, the DESNZ has agreed a new Memorandum of Understanding (MoU) and new single-year funding agreement with the Hub. Accordingly, a new Memorandum of Agreement, Delivery Schedule, and Service Agreement are being finalised for the delivery of Hub functions within Hull and East Yorkshire.

While the core elements of the Hub remain, there have been important changes to the objectives to relate more closely to the Government's current priorities, including Great British Energy (GBE), the Local Power Plan, the Warm Homes Plan, and the National Energy System Operator (NESO).

#### 3. <u>Issues for Consideration</u>

In the previous MoU, DESNZ established five primary objectives for the Zero Hub:

Author: Status:

Date: 29/10/2025

- 1. "Attract commercial investment into projects and help to develop investment models which accelerate progress to net zero.
- 2. Increase the number, quality, and scale of local Net Zero projects being delivered across the region.
- 3. Develop and support Net Zero elements to wider programmes and initiatives delivered across England.
- 4. Support a national knowledge transfer programme to improve information sharing, training, and evaluation.
- 5. Raise local awareness of opportunities for and benefits of local Net Zero investment".

In the updated MoU, DESNZ has established three primary objectives and a number of sub-objectives for the Hub. These objectives, and the surrounding narrative, provide significant opportunities to blend local priorities with those of Government around energy security and clean power in a way that focusses on reducing energy bills for residents, businesses, and the public sector; driving investment across sectors; and supporting and creating well paid jobs. The new objectives are:

- "Attract commercial investment and help LAs apply investment models that accelerate progress to Clean Power 2030 & Net Zero 2050. Increasing the readiness of net zero projects (including renewable energy generation projects) across the region in line with national targets and strategies, including GBE.
  - 1.1. Leverage a pipeline of 'investment ready' projects supporting local & national priorities.
  - 1.2. Encourage LAs to apply commercial investment models to accelerate progress.
- 2. Continue to increase the number of, and awareness of, net zero projects and skills (including renewable energy generation projects) across the region in line with national targets and strategies, including supporting early stage-development.
  - 2.1. Establish a pipeline of renewable energy generation projects, building on the current project tracker, to capture current and future projects in local areas.
  - 2.2. Provide data to produce and update maps in collaboration with DESNZ and GBE for projects being supported through the Hubs (in the first instance) and projects being supported by GBE schemes.

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- 2.3. Collect information on community benefits that are offered by projects in the region.
- 2.4. Continue to build the pipeline of early-stage projects for Hub support.
- 2.5. Build a regional picture of clean energy skills and jobs within LAs to support the transition.
- 2.6. Ongoing support for local net zero planning including, exploring with DESNZ, Ofgem and NESO how to best provide support for local government to feed into the Regional Energy System Planning process.
- 3. Support a national knowledge transfer programme to improve information sharing, training, and evaluation, and build networks and partnerships. Support LAs in their engagement with the public on net zero and net zero programmes.
  - 3.1. Support Net Zero Go as the UK-wide knowledge transfer platform for local net zero capability support (<a href="https://netzerogo.org.uk/">https://netzerogo.org.uk/</a>).
  - 3.2. Support existing national knowledge transfer programmes, especially where events are occurring in Hub regions.
  - 3.3. Deliver cross-Hub working groups to address regional specific barriers and support delivery of departmental priorities.
  - 3.4. Convene local government, community energy groups, distribution networks, and developers to identify partnership opportunities.
  - 3.5. Support the standardisation of processes for LAs and Community Energy Groups to progress renewable energy projects.
  - 3.6. Support the delivery of Warm Homes ambitions (noting the Warm Homes Plan has not yet been published)".

The Hub continues to operate in a blended format, with regional programmes being delivered through roles hosted at Tees Valley Combined Authority and West Yorkshire Combined Authority, and dedicated local capacity support being delivered in each Combined Authority region through a Regional Project Manager hosted by a relevant local organisation. The five Hubs in England also continue to work collaboratively with DESNZ and other key bodies through national cross-Hub working groups.

Regional programmes currently being delivered across the North East and Yorkshire region include:

- Strategic Stakeholder Engagement
- Social Housing Decarbonisation
- Community Energy
- Heat Network Zoning
- Public Estate Decarbonisation

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For October 2025 – September 2026, a Service Agreement will be in place for the delivery of the local capacity support within Hull and East Yorkshire. Given the current capacity of the Combined Authority, the local capacity support function will continue to be hosted by the Business Growth and Skills Hub but may be brought into the Combined Authority during the funding period.

A Delivery Schedule is close to finalisation between all relevant parties for the function and outputs of this role. As per the Service Agreement quoted above, the role focusses on objectives 1.1, 1.2, 2.1, 2.2, 2.4, and 2.6, but will support the wider Hub team in delivery of all objectives and sub-objectives.

The Delivery Schedule sets out more specific deliverables and targets than in previous years, which can include projects where support and development continues from the previous year. These include:

- Realised non-grant capital funding for delivery of energy projects of at least £850k
- Support/development of commercially investable energy projects to at least outline business case with energy generation potential of at least 4.2MW
- Average grant requirement element in developed projects of at most 60%
- Identifying early-stage projects for future support with energy generation potential of at least 3.6MW
- Delivery of the Local Area Energy Plan
- 100% response rate to NESO consultations and requests for information
- Production of at least 4 case studies of energy projects and related activity

Ongoing work that aligns to the new objectives, deliverables, and targets includes:

- Project development, application submission, and approvals navigation for the Mayoral Renewables Fund
- Development of the business case for solar support for businesses, homes, and schools
- Development of the Local Area Energy Plan
- Coordination of the HEY response to NESO data requests and consultation

Regional appetite and priorities for financing models, partnership development, and geographical and sectoral support will drive how the local capacity support function will seek to meet these new objectives.

The views of the Business Board are sought on these priorities to help guide the function and delivery of the Hub local capacity support within Hull and East Yorkshire for the next year.

#### 4. Next steps

Author: Status:

Date: 29/10/2025

The Service Agreement and Delivery Schedule between the Hub and the Business Growth and Skills Hub will shortly be finalised following final approval from all relevant parties.

The views of the Business Board will be embedded into the function and delivery of the Hub local capacity support within Hull and East Yorkshire.

Contact Officer: Harry Baross Telephone No.: 01482 616175

Officer Interests: None

Background Documents: - N/A

Author: Status:

Date: 29/10/2025

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## **Briefing Paper to the HEY Business Board**

Report by Jon Brunton, Growth Hub Manager Thursday 6<sup>th</sup> November 2025

## **HEY Growth Hub & Programmes - Operational Update**

## 1. Purpose of the Paper and Summary

- 1.1. The HEY Growth Hub delivers a suite of funded business support services in the region, managed by the HEY Business, Growth and Skills Hub and in partnership with Hull City Council and East Riding of Yorkshire Council. The core funded Growth Hub service provides generalist information, advice, guidance and signposting to businesses of all sizes, sectors and maturities across the HEY region. This support is provided via one-to-one advice, oneto-many workshops and events, and access to business support information, guidance and resources via the Growth Hub website.
- 1.2. The Growth Hub also delivers three discrete schemes aimed at specific business sectors or business needs. These are the Made Smarter Programme, the Creative Growth Programme, and HEY Workforce.
- 1.3. As required by agreed governance arrangements, this paper provides an overview of the Growth Hub activity in the six months to 30th September 2025. It also provides an overview of the performance of the Growth Hub's discrete programmes.

## 2. Background

2.1 This paper references a briefing note to the board which was circulated on Thursday 14<sup>th</sup> August 2025 in lieu of that month's board meeting which was postponed. That briefing note presented a full delivery plan and budget breakdown for the core Growth Hub in the 2025/26 year.

## 3. Issues for Consideration

## 3.1 Core Growth Hub service

3.1.1 Following receipt of the Growth Hub's annual 2025/26 funding schedules from DBT on Wednesday 16<sup>th</sup> July, these were completed and returned to DBT on Friday 8<sup>th</sup> August. The schedules set out the Growth Hub's delivery plan, KPI outcome targets, and budget for the 25/26 year, which were shared with the Board via a briefing paper on 14<sup>th</sup> August in lieu of August's board meeting.

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- 3.1.2 Following submission of the completed funding schedules, the grant offer letter was received from DBT on Thursday 2<sup>nd</sup> October. This was signed and return by the accountable body's S151 Officer the following day. We must report that the arrival of the grant offer letter so late into the financial year has had a material impact on the timetable for delivering certain Growth Hub activity in 25/26.
- 3.1.3 HEY Growth Hub is due to submit its half-year report to DBT on Friday 7th November. This report will contain a summary of Growth Hub activity in the first six months of the 2025/26 year and will also provide the key performance metrics for the same period. This report is being finalised at the time of writing. A concise briefing note summarising this information will be circulated in-person at this meeting of the Board for reference purposes.
- 3.1.4 In partnership with Hull City Council and East Riding of Yorkshire Council business support officers, the Growth Hub has submitted a joint funding request to the HEYCA investment projects pipeline. Developed in close collaboration, the funding bid seeks to build on the successful HEY partnership delivery of business support services to regional SMEs over the past 3 years and also addresses the anticipated reduction in other funding for regional business support from 1st April 2026, including UKSPF funding and the cessation of the Department for Culture, Media and Sport funding for Creative Growth. Further detail will be presented to the board once the outcome of the funding bid is known.
- 3.1.5 This year the Growth Hub has received £54,200 Uplift funding for the provision of support to high street businesses, cooperative and mutuals businesses, and for Business Growth Service (BGS) implementation in-region. Progress on this activity is as follows:
  - 3.1.5.1 The High Streets Business Support programme has now identified the four target high streets which will benefit from this pilot programme. These are Chanterlands Avenue and Beverley Road (Stepney) in Hull, and Hessle and Pocklington town centres in East Yorkshire. Working with both local authorities and community groups/forums in those areas, the Growth Hub is currently finalising a procurement specification for the delivery of one-to-many workshops and one-to-one consultancy advice to high street businesses in these areas. This support will be delivered in Q4 25/26, with some limited initial engagement in the pre-Christmas period.
  - 3.1.5.2 The Growth Hub has undertaken desk research that has identified 21 cooperative and mutual firms in the HEY region. Following this, the Growth Hub will write to these 21 firms to make them aware of the support available from the Growth Hub. We are also seeking to meet with industry body Co-operatives

UK to discuss areas of collaboration and to better understand the challenges facing the sector.

- 3.1.5.3 In regard to BGS Implementation, the Growth Hub has undertaken some awareness raising/briefing sessions for the benefit of advisor staff as well as member of the HEY business support network. Moreover, we are about to issue a tender for the build of a new Growth Hub website, which will greatly assist the Growth Hub's connectivity with the new BGS. It is hoped that the new website will be launched by the end of March 2026.
- 3.1.6 The Growth Hub, in partnership with both HEY local authorities, jointly hosted a successful business conference on Thursday 23<sup>rd</sup> October. Titled "The Future of Manufacturing", the conference attracted over 75 delegates from industry and featured Juergen Maier as keynote speaker, with Mayor Luke Campbell providing a welcome address for delegates. Feedback from the event has been very positive, with similar events planned for the future.
- 3.1.7 The Growth Hub is currently working with DBT and the Yorkshire cluster of Growth Hubs on the business case and delivery plan for a new business support programme in the 2026/27 year. This included a Growth Hub hosted focus group with 11 Professional Business Support (PBS) firms on 1st October\*.

Made Smarter for Professional & Business Services (PBS) will replicate the Made Smarter delivery model in use for manufacturers, and will assist PBS firm to explore, adopt and implement transformative digital technologies to drive productivity, innovation and competitiveness. The PBS sectors\* in-scope are:

- Legal
- Accountancy, Tax and Audit
- HR & Recruitment Consultancy
- Advertising, Marketing & PR
- Architecture
- Engineering Consultancy

#### 3.2 Made Smarter Programme

- 3.2.1 The 2025/26 Yorkshire & Humber Made Smarter Programme is now in full delivery following the commissioning and mobilisation of delivery contractors by 14<sup>th</sup> August. RTC North are leading the delivery of the business support elements of the programme, whilst Sheffield Hallam University are leading the workforce development elements of the programme. SYMCA are responsible for overall programme management and the delivery of the capital grant scheme.
- 3.2.2 HEY Growth Hub's Made Smarter Digital Transformation Specialist manages a caseload of regional manufacturing firms and helps

facilitate their access to the various strands of the programme. Current programme outcomes are as follows:

- 18 digital roadmaps (360 degrees digital audits) completed
- 1 technical support voucher (grant) awarded
- 3 capital grant applications submitted awaiting panel outcome
- 12 businesses registered to Digital Manufacturing Champions course (HEY cohort)
- 9 businesses registered to the Digital Manufacturing Leadership course (joint HEY/North Yorks cohort)
- 3 student placements identified
- 3.2.3 Our Digital Transformation Specialist has also organised a number of "Industry 4.0" workshops, delivered in region by tech experts. These have included:
  - 25<sup>th</sup> September Microsoft 365 in Manufacturing (25 delegates)
  - 2<sup>nd</sup> October Digital Product Passports (16 delegates)
  - 16<sup>th</sup> October Digital Provider Networking Event (14 delegates)

## 3.3 Creative Growth Programme

- 3.3.1 The Programme's Cohort 6 the second cohort of the 2025/26 year commenced on Tuesday 14<sup>th</sup> October at the University of Hull Business School. Eight creative SMEs have enrolled on the cohort, featuring a mixture of creative digital tech firms, advertising & marketing agencies, videographers, and museums.
- 3.3.2 Unfortunately, the programme is currently behind target on the number of firms enrolled, with nine businesses taking part on cohort 5, and eight on cohort 6. Both cohorts had a target of 15 firms each, resulting in a current attainment level of seventeen businesses enrolled against a target of thirty.

We are keeping funders DCMS closely appraised of this and have agreed within the programme partnership a target of twenty firms to enrol on cohort 7 – the final cohort – commencing in January 2026.

The programme has undertaken a wide range of demand stimulation activity, including digital marketing, telemarketing, partner amplification, leaflet drops at business centres, press releases & case studies, and Growth Hub advisor promotion. There is a strong level of interest in the programme, with the most cited barrier for business enrolment being the time commitment required of participants.

3.3.3 We are planning to once again sponsor and attend the Creative UK "Big Creative UK Summit" at King's Cross, London in February 2026. This presents the opportunity for up to three of our programme participants to exhibit and pitch at a national industry conference, which it is hoped will attract a high attendance of investors.

- 3.3.4 We have commissioned a report into the investor networks present in HEY, with a view to undertaking more proactive investor engagement for the benefit of programme participants that are seeking investment. We are also exploring the possibility of commissioning the build of an online portal that would help to connect firms seeking investment with investors, similar to the "equity hub" as recently launch by the York & North Yorkshire Growth Hub.
- 3.3.5 Any potential future funding secured for a new iteration of Creative Growth would entail more flexible entry criteria to support those interested businesses who could not access the current programme (the EOI/wait list of interested yet 'ineligible' businesses is now approximately 40).

#### 3.4 HEY Workforce

- 3.4.1 The Workforce Development Business Advisor (WDBA) continues to provide a range of employment, workforce and skills support to regional businesses. This support typically consists of:
  - Connecting employers to funded skills and training provision
  - Advice on workforce planning, talent management, and workforce wellbeing
  - Support for recruiting apprentices, trainees and student placements
  - Advice on apprenticeship levy transfer and support to facilitate transfer between large levy paying employers and smaller employers in-region.
- 3.4.2 In the six months to 30<sup>th</sup> September, the 0.4 FTE WDBA role achieved the following:
  - 52 businesses assisted
  - 170 workforce development support opportunities identified, including:
    - 30 apprenticeship opportunities
    - 5 job vacancies
    - 85 Skills Bootcamp enquiries
    - 26 workforce funding enquiries
  - £47,000 of apprenticeship levy transfer has been facilitated, contributing to 5 new apprenticeship opportunities.

#### 3.5 Business & Economic Intelligence

3.5.1 Please see enclosed with this paper the Growth Hub's business and economic intelligence reports for the months of August and September. This intelligence is gathered via the Growth Hub's team of business advisors, delivery partners, regional business and industry bodies, and via desk based research.

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## 4. Next steps

- 4.1 The HEY Business Board is the governance board for the Growth Hub. Therefore, operational update papers will be presented to future meetings of the board.
- 4.2 If there are any specific aspects of the Growth Hub service or that of its discrete programmes that the board would like to learn of in more detail, this can be accommodated in future iterations of these operational update papers.

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Officer Interests: None

**Background Documents: N/A**