

# Sunderland Economic Update 2012



# Foreword

Sunderland, in common with much of the UK, continues to feel the effects of the recession. But we remain positive despite these tough times. The city and its people have a history of responding well to difficult economic circumstances and we have a clear vision of what we want for the city and a clear sense of direction.

Like many other cities we are facing significant challenges. For us these include the impact of cuts in public spending; rising youth unemployment; a lack of easy access to finance for SMEs, and low levels of developer confidence. But we have bucked current trends by attracting an impressive flow of new private investment and over 3,500 new jobs already this year as we seek to rebalance our economy further towards private-sector led growth.

The Economic Masterplan was launched in 2010, before we knew the recession would last as long as it has. It is a pragmatic plan, drawing on our strengths as an internationally minded city with a strong industrial heritage, yet determined to take a long-term view and adapt to new ways of working and doing business. If anything, its relevance is greater now than it was then.

Despite the prevailing economic uncertainty, the City Council and others have continued to invest in the city. Inevitably we have not achieved everything in the plan in this short time, but there is much of which we can rightly be proud. And we firmly believe, put simply, Sunderland is the easiest place in the UK to do business.

This update will help us reflect on our achievements so far, and focus on what we will do next as we strive to create a smart and sustainable future for Sunderland.



Cllr Paul Watson  
Leader, Sunderland City Council

# Executive summary

While recession has hit the North of England particularly hard, Sunderland has remained focused on securing its long-term economic future. Launched in 2010, the city's Economic Masterplan brought private and public sector partners together to encourage inward investment, manufacturing and the development of hi-tech industries.

Two years on,

- M** The city has benefited from around 20 private-sector investment projects creating over 3,500 jobs
- M** Nearly 200 local, growing businesses have received financial support, creating 1000 jobs and safeguarding a further 600
- M** Sunderland has secured one of a new breed of Enterprise Zones and attracted the first Enterprise Zone investment anywhere in the UK.
- M** The location for a new central business district, the Vaux site, has been acquired for the city, and is being enhanced in preparation for investment.
- M** The city has attracted three new hotel developments.

- M** The new Sunderland Software Centre has been built and will open soon.
- M** In partnership with IBM, we have built a private city cloud - one of the first of its kind in Europe.
- M** In partnership with BT, Sunderland will become the first city in Britain to offer wall-to-wall superfast broadband coverage.

Given the poor state of the economy and the general decline in investment, we are quietly confident, based on what we have achieved so far, that these and other initiatives will bring continued economic growth and jobs to the area over the next few years.

There is much more to do but we believe we have made a solid start, with a clear set of priorities that after two years are proving to be the right ones for the city and its economy.

## Introduction

The Sunderland Economic Masterplan was launched in October 2010 as a strategy for economic growth developed jointly by public and private sector partners in the city. At its core the Economic Masterplan seeks to build on the city's key strengths and existing assets and to demonstrate how the city will earn its living over the next decade and beyond. It sets out clear priorities for implementing that strategy. Its vision for Sunderland's economy is that the city will become 'An entrepreneurial city at the heart of a low-carbon regional economy'.

This Update covers what we have achieved since 2010 and where we will go from here. It considers the four core aims in detail, and features case studies that illustrate how we have put our aims into practice.

The fifth 'underpinning' aim in the original Economic Masterplan was 'a one-city approach to economic leadership', which has been realised in the shape of our Economic Leadership Board. This body brings together senior partners from across the city to offer guidance, thought leadership and governance to the strategic economic development of the city.

In addition to the Economic Leadership Board, city businesses of all sizes and types have come together during the past two years, to network, share ideas, tackle challenges and act as advocates for each other and for the city.

This business 'community' with strong networks into the university, council and other organisations in the city is providing its own leadership in support of a vibrant and varied economy in Sunderland. A business improvement district and business bond-holder scheme are just two of a whole raft of ideas emanating from this collaboration.

## Where we are now

Against a backdrop of tough economic times in the UK, Sunderland has continued to attract investment and create jobs. This has been supported by MAKE it Sunderland – a new inward investment marketing campaign for the city launched in June 2012.

With manufacturing now seen as one of the few UK success stories of recent years, Nissan has been much covered in national and international media. Already in 2012, Nissan has announced investment of over £250m in the city which will create around 3,000 jobs at its plant and in the supply chain. Total investment in the plant now stands at some £3.5 billion. The benefits for the city from the Nissan presence include a growing knowledge of supply chain development and management that could transfer to use in other sectors such as offshore and advanced manufacturing.

Other substantial investments in the city include £82.5m for the New Wear Crossing from the Department for Transport, £8m from Gateshead College for a Skills Academy for Sustainable Manufacturing and Innovation and £6m for managed workspace in Washington, jointly funded by the City Council and European Regional Development Funds.

At present, Sunderland is clearly an attractive proposition for businesses, with more than 50 'live' enquiries from prospective investors considering the city as a place to do business.

In terms of new businesses, we know we need to encourage entrepreneurship and a more diverse business base. The city has low levels of R&D and this is reflected in the low numbers of patents registered. The city has supported around 120 individual start-ups since March 2011 and our aim is to increase the number of start ups in high-tech, non-lifestyle businesses.



## Aim 1: A new kind of university city

Education and enterprise should go together. This has been one of our guiding principles as we work to ensure that students and businesses alike can benefit from hi-tech developments in and around Sunderland. The increase in knowledge-based industries, R&D investment and practical collaboration between the university and business suggests we are making real progress.

### Attracting software companies

The North East region boasts an impressive software cluster and Sunderland with its focus on enterprise software companies benefits from some £65m a year into the city's economy through the software business already here.

As part of an effort to build on this cluster and attract more businesses, a purpose-built £10m Sunderland Software Centre will open by the end of 2012. A collaborative ideas hub for software specialists, the centre will accommodate more than 60 cutting-edge businesses in this premium city centre location.

Sunderland's Software City has also attracted £1.86m of European funding to help support new software businesses and create jobs in the North East.

### The easiest place to do business

In 2011 Sunderland City Council and IBM agreed a landmark deal to create a hi-tech cloud-computing environment in Sunderland by the end of 2012. This private city cloud is believed to be one of the first of its

kind in Europe. As well as saving public money, the cloud will provide a low-cost, accessible and secure network for businesses across Sunderland enabling them to reduce the risks associated with growth. It is a clear example of the council using its own assets to stimulate economic development in the city.

Sunderland is proud to be IBM's first UK Smarter City. Smart is a word that lies right at the heart of Sunderland's economic vision - a truly forward-thinking city that is not only making the most of its existing assets and strengths, but is creating a blueprint for sustainable growth by backing the industries of tomorrow.

To support the ambitious cloud project, Sunderland will be the first city in Britain to offer wall-to-wall superfast broadband with coverage to 90% of homes and businesses planned by the autumn of 2012.

### Promoting enterprise

Encouraging entrepreneurship and enterprise is important to us so we are making sure that we have the facilities to encourage business start-ups in the city. Through a £6 million scheme, jointly funded by the City Council and European Regional Development Funds, a hi-tech managed workspace is being developed in Washington. The space is due to be completed in autumn 2013, with room for 16 separate offices and nine workshop spaces. Specifically aimed at low-carbon business, the development will provide a mixture of incubator space for start-ups and larger spaces for bigger companies.

### Sharing knowledge

In 2011, the University of Sunderland completed a new sciences complex at its City Campus, offering some of the most modern facilities in the UK. At the end of last year, SCM Pharma set up its own facilities in the complex, helping students gain first-hand experience of the pharmaceutical industry.

### SaleCycle – Case study

SaleCycle is one of the many hi-tech businesses driving Sunderland to become a beacon for software development in the UK. With the help of the city council's business investment team, and support from Sunderland Software City, the company is forging an international reputation for its shopping-cart retrieval technology. SaleCycle's cutting-edge product enables website owners to synchronise and coordinate orders, logistics and deliveries.

Dominic Edmunds, president of SaleCycle, said: "There is a real culture of success in the North East. It has been a great help to be able to work alongside likeminded businesses and benefit from access to skilled people with the support of Sunderland Software City and a council that shares our vision."

### Media Savvy Training Solutions – Case study

Media Savvy Training Solutions was established by two enterprising graduates from the University of Sunderland. The business has developed innovative training techniques in numeracy, literacy and IT for 'hard to reach' groups such as long-term unemployed young people and recent offenders on probation.

A pilot course the company embarked on with a group of offenders has been praised for the 'astounding' level of engagement and retention achieved with the participants. Media Savvy also carries out customised workshops in photography, digital imaging, visual effects and computer games development.

Media Savvy is a multi award winning start-up company from the university. In 2011, the company won the inaugural Lloyds TSB Enterprise Awards for Best New Start Up in Yorkshire and the North East; Best Graduate Business Award in the Sunderland Echo Portfolio Awards and was runner-up in the Social Enterprise category in the Blueprint Regional Awards.

The university provided start up assistance, advice and support to help Media Savvy drive forward from its first day and the business is based in Creativitiworks, which was established with the aim of providing accommodation and support for fledgling businesses who want to trade within the creative Industries in Sunderland. Media Savvy is currently working with the Probation Service, Open College Network, youth sector forums, and the North East Refugee service on a variety of projects.

## Aim 2: A national hub of the low-carbon economy

Just as Sunderland once led the nation in shipbuilding, now we want to see our city at the forefront of the low-carbon industries that will underpin a sustainable UK economy. The development of the Nissan Leaf, the Low-Carbon Enterprise Zone and the Port of Sunderland's support for offshore renewables are the most tangible evidence of progress in this increasingly important sector.

### Investing in low-carbon industries

As part of the North East Local Enterprise Partnership (NELEP), Sunderland has established the Low Carbon Enterprise Zone, with the potential to develop more than 140,000 sq m of new business space and providing up to 3,000 jobs.

The city has also secured the first investment in any UK enterprise zone from Vantec Europe Ltd, a global warehousing and logistics firm, which is investing £22.5m in a new 39,000m<sup>2</sup> building at Turbine Business Park, creating more than 300 jobs. After visiting the site, Chancellor George Osborne promptly announced plans to extend the North East's enterprise zone by 50%.

Around 300 electric-car charging points have been installed across the region, including 49 points in Sunderland, with another 29 under way. The city's first greener hybrid-engine buses, Optare Solo SR hybrid vehicles, took to the roads in October 2011, with reduced emissions and fuel consumption. This service, called Sunderland Connect, links major city-centre venues and amenities and has attracted more than 6,000 passengers a week. Sunderland Connect is a partnership between Nexus, Sunderland City Council and the University of

Sunderland. The University recently launched a smartphone app linked to this route.

### Buildings and infrastructure

We still have a lot of work to do to develop low-carbon commercial property, including buildings that use combined heat and power and other energy efficiency measures. This has proved particularly difficult at a time when the private sector is reluctant to invest; but we remain committed to exploring opportunities in this area.

However, we have seen some exciting developments in Sunderland, including a new Primary Care Centre – the first in the UK to receive the BREEAM outstanding rating.

### Offshore and renewables

Sunderland has an enviable asset in its municipally owned port. Where once the 300-year-old port saw a daily flow of coal out of the North East, now the city council has set its sights on an altogether cleaner form of energy – wind power.

Sunderland is ideally positioned to play a key role in Round 3 offshore wind farm development zones. Pre-development survey operations, manufacturing, assembly, installation and maintenance have all been identified as market segments that Sunderland can exploit. The Port is already involved in Round 2 projects and developing this area is the natural next step.

Sunderland is making a name for itself globally as the location for subsea engineering and renewable energy industries. The goal of becoming a low-carbon hub may be just over the horizon.

### Green Investment Bank

Sunderland was one of 32 locations bidding to host the Green Investment Bank. Although unsuccessful, the development of our proposal helped us as a city consider and document our low-carbon assets as well as those within the region.

Our bid won praise from Britain's longest-serving environmental correspondent. Geoffrey Lean from The Telegraph spent two days in the city considering our case and described in his subsequent column how we have set out to be a "low-carbon exemplar".

### The Port of Sunderland – Case study

Sunderland's Economic Masterplan identified the Port of Sunderland as a resource capable of expanding the local economy. We want to ensure that Sunderland's docks will become a hub for offshore renewable energy and subsea engineering businesses, which have already contributed to increased activity and revenues for the city.

The port is ideally placed and equipped to service new and existing wind turbines, alongside traditional bulk cargo handling, greatly improved by the port's investment in a £500,000 crane.

Between 1 April 2011 and 31 March 2012, 450 commercial vessels arrived at the port, an increase of 84% on the previous year. Shipping companies and marine repair and engineering services from all over the UK have chosen to operate out of Sunderland for various reasons, including: the port's record of staying open when others close for bad weather; its skilled local labour; and the Board's reputation for commercial awareness and swift decision-making.

### Nissan – Case study

As the UK's first designated Low Carbon Economic Area, the North East is pioneering the supply and use of electric vehicles and low-carbon vehicle technologies. Smith Electric Vehicles is one of the leading global players in electric commercial vehicles, along with Nissan.

Nissan's Sunderland plant is the company's European centre of excellence for battery manufacturing. This year it launched the first lithium-ion battery factory outside Japan and next year it will start to produce the 100% electric Nissan LEAF. The LEAF is the world's first affordable mass-produced zero-emission car and already one of the most popular electric cars.

Zero Carbon Future's performance track for testing low-carbon vehicles and Gateshead College's Skills Academy for Sustainable Manufacturing and Innovation (SASMI) are both based at the Nissan site. Along with Nissan they are jointly developing the Zero Emissions Centre of Excellence. This will act as a business incubator for the electric-vehicle industry.

Nissan's Sunderland plant is also making great progress in reducing its carbon footprint. Ten 600kW recycled wind turbines now generate nearly 7% of the plant's electricity and its electricity bill has been cut by around £500,000 a year.

## Aim 3: A prosperous and well connected waterfront city centre

Every thriving city needs a centre where people meet, work and spend their leisure time. Visitors to the city are often struck by what a friendly and welcoming place it is. Sunderland has many physical assets, not least its waterfront, but some are in urgent need of refurbishment – hence the city's determination to improve public spaces, transport connections, shops and venues, and thereby build a sense of optimism and possibility.

### Better connections

Sunderland's plans for a landmark New Wear Bridge were awarded £82.5m by the Department for Transport on 14 December. Subject to the council gaining the relevant permissions, we hope on-site construction work will begin in the next 12 months. The new bridge is part of a strategic transport corridor that will connect the city centre with the A19 artery.

The low-carbon shuttle bus, Sunderland Connect, is now operating between the university campuses and the city centre. The route was extended to the seafront during the summer.

### Enhancing the waterfront

Following the adoption of the Seafront Regeneration Strategy in 2010, the council embarked on the first improvements at two key seafront areas of Roker and Seaburn.

The council has applied to the Coastal Communities Fund and, if successful, will spend the money on infrastructure improvements at Seaburn. Further infrastructure investment is required as part of the plan to see the area redeveloped into a family resort with indoor and outdoor facilities.

### Improving retail

In recent months the city has attracted major names such as Disney Store, Caffè Nero and Superdry, while the Bridges shopping centre is extending to house a new 60,000 sq ft Primark store. Inevitably, some central areas are struggling and we have seen shop closures, but we are continuing to support local businesses.

The City Centre Traders' Association has been established to encourage businesses to work closely with the council on issues of mutual interest, while the council has provided specialist advice and grants to retailers as well as sponsoring awards such as Best Bar None and the Retail Awards.

### Other attractions

The council has supported various events including the Christmas illuminations and farmers' and craft markets. There have been improvements to St Thomas Street and Market Square.

The council is also working to improve the number of hotels in the city. A major 82-room hotel is being built in Sunnyside, and we have received planning applications for other hotels near the centre.

### Developing the Vaux site

The Vaux site is now publicly owned. We have improved the site in the short term while we seek investors to provide new office space and new jobs.

### City Campus – Case study

Developments at the University's city campus have created more public spaces for people to enjoy. In 2009, the university completed its £12m City Space development, a new sport and leisure facility open to all in the city and in February 2011, a new public square 'the quad' was opened within the city campus. This space has been specifically designed to allow it to host open air events.

The £6million development at the Priestman building is also nearing completion, connecting the City Campus and city centre. It will provide an art, culture and social sciences hub with a gallery and café.

The University is involved in a partnership development with the City Council and private sector developer for a new 125 bed hotel scheduled to open in Summer 2014, a development which will be of significant benefit to the city as a whole, encouraging people to stay and spend in the city.

The University of Sunderland and City Council are committed to seeing the continued integration of the city campus with the city centre, and this has been formalised in the recently updated City Campus Development Framework.

### The Bridges – Case study

Work has begun on a £15m extension of the Bridges shopping centre into High Street West with a 60,000 sq ft Primark store due to open in Autumn 2012. The Bridges currently attracts more than 20 million visitors a year and has seen improved performance overall, with only 1.3% of shops in the centre lying empty.

The centre has also hosted a range of events and activities over the summer of 2012, from the Sunderland Indoor Beach to a Jubilee Exhibition featuring the Replica Crown Jewels.

## Aim 4: An inclusive city economy for all ages

Sunderland has always been a place of the people: a sense of community is one of the city's assets and this has been strengthened through opportunities being available to the widest possible cross-section of society. As we move to an economy where we are encouraging entrepreneurship and more small businesses, we need to have a skills strategy that ensures no one is left behind. When people of all ages and abilities have the chance to be part of a skilled workforce, Sunderland will benefit fully from its efforts to foster local enterprise and attract external investors.

### Supporting start-ups

Between April 2009 and March 2011, Sunderland City Council and partners in the Sunderland Enterprise Consortium provided a wide range of support through the 'Just the Job' initiative for residents who wanted to start their own businesses. The scheme helped 461 people to start new businesses. Since then, despite reduced government funding, the Enterprise Consortium has helped a further 120 people to start their own businesses.

### Generating new jobs

Although our Economic Masterplan focuses on low-carbon industries, we recognise that Sunderland is home to many different kinds of businesses. In recent months local companies, with support from the council, have secured money from the government's Regional Growth Fund to help them expand, a real boost for Sunderland's supply chain.

In addition, the North East Local Enterprise Partnership (NELEP) received £16.7m of Growing Places funding to distribute in the area. Businesses have been able to bid for money from the fund by demonstrating how they will generate jobs and growth and make a profit on the investment. This profit is then to be reinvested in a revolving fund that can continue to create jobs in the region.

For Growing Places Fund, four of the seven bids agreed by NELEP so far have come from Sunderland.

### Developing a skills strategy

Partners across the city continue to work on developing a skills strategy. We recognise that this is vital to creating an economy that offers opportunities and brings benefits to everyone and the Economic Leadership Board is also working with leaders of education provision in the city to achieve this.

Given recent changes, including the abolition of the Learning and Skills Council, the introduction of the Work Programme and other changes in the way schools and colleges operate, we anticipate that our skills strategy will be ready in early 2013. Following on from a survey that was undertaken across the city, we are now examining the current skills environment from an employer and individual perspective, as well as looking at the changing nature of the world of work. Along with developing the strategy, we are continuing to build stronger relationships between educational institutions and businesses.

### Creating new homes

Since the onset of the financial crisis in 2007, 2,860 new homes have been built in Sunderland.

Through the National Affordable Housing Programme and Kickstart, £40m of new investment has been provided for over 800 new homes in the same period. A further £9m is being invested in creating nearly 600 additional affordable homes between now and 2015.

### Enterprise Consortium – Case study

Fashion designer Alexandra Kay is one of those benefiting from an enterprise programme established by Sunderland City Council, Social Enterprise Sunderland and the North East Business Innovation Centre. After a successful career working in Italy and Hong Kong for companies including Armani and Harrods, Alexandra returned to her native Sunderland to set up her own brand, a boy babywear and gift label called I Miei Cherubini ('my little cherubs' in Italian).

"I gained great experience from working for so many well known fashion brands around the world but when it came to starting my own company, I wanted to do it back here in Sunderland," says Alexandra. "Once I'd decided to do that I was really impressed with the financial help available to me here."

Alexandra plans to work with local suppliers and other businesses wherever possible. She has noticed a thriving entrepreneurial spirit in Sunderland.

### Extra care housing – Case study

£80m of capital investment is helping produce 600 extra care dwellings. These provide some of our older residents with improved housing choice and a real alternative to residential care. They also provide employment in the care and support services, as well as in construction.

Importantly, households moving into extra care housing release larger family homes back into the housing market, helping reduce the pressure on waiting lists and bringing greater choice of homes for sale.

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# What next?

## Enterprise and Innovation

When we launched the Economic Masterplan two years ago, we said we were aiming to set the direction for the city's economy for the next 15 years. As part of that long-term approach, we wanted to develop an enterprise and innovation strategy for the city. Two years on, we have almost completed that work, and we propose to launch the strategy in early 2013.

## Enterprise Zone

Sunderland's Ultra Low Carbon Vehicle Enterprise Zone (EZ), situated adjacent to the Nissan car production plant, ensures that there is a strong connection with the Nissan supply chain and provides the opportunity to develop an ultra-low-carbon vehicle cluster in the city.

The EZ currently comprises 42 hectares in three sites, but in August 2012 Chancellor George Osborne announced plans to extend the North East EZ by 50 per cent. Site 1, Turbine Business Park, to the south of the Nissan test track, has planning permission for a mixed-use development. Vantec Europe Ltd, a Nissan supplier, has eagerly taken up the challenge – and it was this first investment in any of the UK's EZ sites that seems to have prompted the Chancellor to announce the extension plans.

A planning exercise is under way for other sites and this will provide the basis for further development in the EZ, which has the capacity to provide more than 47,000 sq m of new development and 1,150 new jobs by the end of 2015. Over the 25-year life of the EZ, we estimate that more than 140,000 sq m will be developed and 3,000 jobs will be created – although that figure may rise depending on how and where the EZ is extended.

## Investment Corridors

£4m of funding has been allocated to the city centre to improve its look and feel, especially along key corridors that will link it with the university, the riverfront, and the coast. We will invest more to improve the environment on the riverside corridor near St Peter's.

## The Vaux site

The former Vaux brewery site near the city centre is one of the most exciting office development opportunities in the North East. With public-sector investment in advanced infrastructure works of around £13m we intend it will provide business premises for around 4,000 people.

Since acquiring the Vaux site, the council has undertaken a programme of works to improve its immediate appearance. In the longer term, it is vital that the site can meet the needs and aspirations of potential occupiers, developers and the city as whole. We are planning to remodel the surrounding streets to create a more direct route to the site both for vehicles and pedestrians. A new public space at the western end of the high street is also being created, capable of hosting events and activities; these developments will connect Vaux more effectively to the city centre.

## City Deal

The Government has rolled out the first round of its City Deals programme, striking bespoke deals with the eight largest cities outside of London – the so-called 'core cities'. Wave 2 of these City Deals is likely to include large 'second-tier' cities such as Sunderland. We believe this is a massive opportunity for the city and we will be

submitting a bid that focuses on key areas of transport, skills, training and support for core industries, within the context of an integrated economic and social growth strategy for the city.

## Station Improvements

Sunderland Station is a major gateway to the city, served by Metro, Northern Rail, and Grand Central services which provide four direct services a day to London. More than two million passengers pass through the station each year.

In 2010, the below-ground platform areas of the station were improved, but the above-ground areas have barely been refurbished since they were built in 1966. Now council officers and representatives from Nexus and Network Rail have come together to consider options for the total rebuild of this area. The intention is that costs will be shared by partners and development could begin in 2014.

## Future Cities Initiative

The Government innovation agency, the Technology Strategy Board, has selected Sunderland, along with 30 other cities from across the UK, to explore ways in which they could better integrate IT and communications and transport to help expand their economy.

Sunderland has been awarded £50,000 to prepare and submit feasibility studies showing how it could integrate transport, communications and other infrastructure to improve the local economy, increase quality of life and reduce impact on the environment. The successful city will be awarded £24m funding to implement its proposals.

Sunderland has already shown its ability to be a truly forward-thinking, innovative city with its investment in the city's ICT infrastructure, including the development of a private city cloud and wall-to-wall superfast broadband.

The Future Cities initiative aims to show the extra value that can be created by integrating a city's systems. The project will enable businesses to test new ways of connecting and integrating individual city systems, to create new wealth streams and improve the environment.

## LABV

Sunderland City Council is launching a landmark public and private partnership which will undertake the city's largest-ever redevelopment project over the next 20 years.

The City Council is seeking a joint venture co-investment partner from the private sector to transform seven important development sites across the city totalling almost 150 acres, it will also contribute an investment portfolio of around 100 of its publicly owned assets.

The private partner will invest an amount of money equal to the market value of assets and sites to kick-start regeneration projects across the city. They will share the City Council's vision for effective, long-term regeneration across the city, and be able to provide evidence of robust funding and a track record of large-scale development delivery.

The City Council aims to appoint a private sector investment partner in 2013.



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