

# The Impact of Brexit on North Norfolk: A discussion note

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## Introduction and summary

On 23<sup>rd</sup> June 2016 voters were invited to consider the following question: *'Should the United Kingdom remain a member of the European Union or leave the European Union?'* 17.41 million people (51.9% of those who voted) chose *'Leave the European Union'* and 16.14 million (48.1%) chose *'Remain a member of the European Union'*. In the North Norfolk Parliamentary Constituency,<sup>1</sup> the percentages were 58.9% for leave and 41.1% for remain.

The referendum debate was wide-ranging and embraced sovereignty and nationalism, Britain's role in the world, attitudes to immigration as well as the future of the economy. The economic argument, while important, was conducted at a macro, or national, level; there was little consideration of the potential impact of the decision on smaller local areas. This note, which was completed in March 2018, roughly halfway through the negotiation process, considers the impact of Brexit on the rural, coastal area of North Norfolk and concludes:

**Few, if any, Parliamentary Constituencies in Britain are more vulnerable to a hard Brexit than North Norfolk. It is arguably the area with the most to lose and the least to gain.**

An urgent consideration of the consequences is required from all local decision-making bodies.

## North Norfolk in context

An overview of North Norfolk is set out in the *Constituency Profile* section of the parliament.uk website; this compares constituency data with regional data and data for the UK as a whole. The most striking feature is the North Norfolk age profile. In 2016 28,513 people (out of a total of 86,710) were recorded as 65 or older. At 32.9% this amounts to almost a third of the population: for the UK as a whole the comparative figure is 18% and for the Eastern region 19.3%.<sup>2</sup>

*Constituency Explorer* a joint House of Commons and Durham University project presents slightly different figures but points to the same conclusion. At 29.6% North Norfolk has the third largest population of 65+ year olds in the UK, with only Christchurch (at 32.2%) and Clacton (at 30.2%) occupying higher positions in the league table.<sup>3</sup>

**No other statistic is as stark in its implications. This disproportionate number of older people has an inevitable impact on care and health services.**

Detailed data on employment patterns in North Norfolk (and a deal of other useful demographic data) is set out in the East of England Forecasting model.

This offers statistics and baseline forecasts assembled by an independent consultancy, Cambridge Econometrics, on behalf of a range of public bodies in the Eastern region. Relevant data can be conveniently accessed and downloaded through a link on the North Norfolk District Council (NNDC) website.<sup>4</sup>

The table below gives North Norfolk employment by sector (000s) for the year 2016 and the forecast for 2030

	<b>2016</b>	<b>2030</b>
Agriculture	1.9	1.5
Mining & quarrying	0.2	0.1
Manufacturing - food	1.4	1.1
Manufacturing - other	2.6	2.2
Utilities	0.1	0.1
Waste & remediation	0.1	0.1
Construction	3.4	4.6
Wholesale	1.6	1.6
Retail	5.6	5.6
Land transport	1.3	1.3
Water & air transport	0.1	0.1
Accommodation & food services	5.3	6.2
Publishing & broadcasting	0.3	0.2
Telecoms	0.0	0.0
Computer related activity	0.2	0.2
Finance	0.5	0.4
Real estate	0.7	0.8
Professional services	1.9	2.0
Research & development	0.0	0.0
Business services	1.4	1.4
Employment activities	0.1	0.1
Public administration	1.2	1.3
Education	3.4	3.2
Health & care	4.8	5.3
Arts & entertainment	2.4	2.5
Other services	1.4	1.4
<b>Total</b>	<b>41.8</b>	<b>43.4</b>

As well as the expanding health and care sector, tourism (classified above as food and accommodation services) is a major and growing employer; farming, though still seen as one of the defining characteristics of the County, employs fewer people and the labour force is declining year on year. It can be seen that the '21<sup>st</sup> century industries' built round IT and Telecoms play a very limited role.

Generally North Norfolk can be described as an area of low unemployment, with below average wages and productivity, and a higher than average number of smaller, or micro, businesses.

## The economic challenges

A clear and up-to-date statement of the challenges that lie ahead was set out in the October 2017 Norfolk and Suffolk Economic Strategy. This was produced by the New Anglia LEP (Local Enterprise Partnership), a business-led organisation supported by the local public authorities.<sup>5</sup> The 2017 Strategy Document was considered, and broadly endorsed, by both the Norfolk County Council and the NNDC. The County Council described the document in the following terms: *“The Strategy sets a vision for Norfolk and Suffolk to be an internationally facing and more productive economy whilst maintaining a highly skilled workforce. It aims to achieve these ambitions through actions and investments in priority places and themes.”*<sup>6</sup>

A commitment to developing a skilled workforce able to compete internationally is a worthy one; the challenge is how this can be achieved in North Norfolk. Of the sectors that were identified in the Strategy Document the most promising were *“globally important clusters in ICT and telecoms, life sciences and genomics, clean energy and financial industries.”*<sup>7</sup> With the possible exception of clean energy, these clusters lie a considerable distance from North Norfolk (for example in the Cambridge-Norwich corridor). The 2017 Strategy Document specified nine key sectors where Norfolk and Suffolk have competitive advantages; over three pages it listed relevant companies and organisations with their locations. One sector was *‘Visitor Economy – Tourism and Culture’*: here both the North Norfolk Coast and the Broads National Park were described as unique national assets. Otherwise only two named organisations over the three pages were located in the North Norfolk geographical boundary: the Bacton Gas Terminal (providing one third of the UK gas supply) and chocolate manufacturer Kinnerton in Fakenham.

Prior to its endorsement of the LEP strategy, North Norfolk District Council had published its own *‘Economic Growth: Strategy and Action Plan’*. The Council’s Cabinet considered this document in October 2016. The section on economic context again emphasised the visitor economy: *“North Norfolk is a beautiful place, abundant with environmental and cultural assets, including the Norfolk Coast Area of Outstanding Natural Beauty, the Broads National Park, historic towns and villages.”*<sup>8</sup> It also stated that the District was home to leading businesses *“supporting key sectors such as manufacturing, energy and food production.”*<sup>9</sup> No leading businesses were named, but the document continued: *“The economy comprises large numbers of micro-businesses as well as a thriving tourism sector; whilst at the other end of the spectrum accommodating Bacton Gas Terminal ... and a burgeoning off-shore renewable energy sector.”*<sup>10</sup>

At its October meeting the NNDC Cabinet also considered a report on business growth commissioned from the BE Group of consultants. Again the same message emerged: *“The North Norfolk community is characterised by an ageing population, low (but positive) population growth, low unemployment and a moderately skilled workforce... The economy is centred on retailing, tourism, manufacturing and services such as health.”*<sup>11</sup> The BE Report also suggested that there were three sub-areas in North Norfolk all with different economic characteristics: an eastern area with a relationship to Great Yarmouth, Norwich

and the Broads, a central area which was '*particularly insular and self-contained*'; a western area having a relationship with King's Lynn and to the south.

Parts of the eastern area (notably the market town of North Walsham) have access to opportunities in Norwich (for example, an Aviation Academy recently opened at Norwich Airport).<sup>12</sup> Parts of the western area will be within reach of potentially expanding companies involved in food processing.

**Generally, however, North Norfolk does not figure in the growth areas for the future identified in the various strategy planning documents.** It may be an attractive place to live and for tourists to visit but the only significant industry cluster with growth potential lies on the '*Energy Coast*' (to reproduce a term used in the LEP Strategy Document) which has "*the world's largest windfarms in development ... with a globally competitive renewables supply chain and support industry.*"<sup>13</sup> **It is evident that the central, largely rural areas of Norfolk contain few of the characteristics of a modern, knowledge-driven and service-led, economy.**

## The Brexit opportunity

The debate surrounding the June 2016 referendum focused mainly on the political arguments for a sovereign Britain. There was a strong undercurrent opposed to immigration, based on a view that European Union (EU) membership allows overseas nationals to take jobs that would otherwise be filled by British workers. There was argument that EU membership required expenditure on bureaucracy and inappropriate subsidies that could be redirected to more urgent priorities in the UK.<sup>14</sup>

The economic case for Brexit received far less exposure in the 2016 referendum campaign. Given the result, however, a detailed examination is important. In broad terms the case runs as follows. The UK economy would benefit from '*full regulatory autonomy*': the government must have the ability to change the laws and rules that govern our international trade; we should not be a '*rule-taker*' from Brussels. This would permit the UK to negotiate new trade deals with third countries outside the EU, including, for example, the Asia-Pacific countries, where growth is fastest.

As negotiations have progressed the debate has moved on and different perspectives have emerged and new arguments have come to light. Some have advocated a fresh referendum; some a soft Brexit, with the UK remaining in both the single market and the customs union<sup>15</sup>; some a harder Brexit with complete domestic autonomy. In the hard Brexit case the UK's international trade would be governed only by the rules of the World Trade Organisation (WTO). There are also on-going negotiations about the shape and length of a potential transition period, with a leaked, and subsequently published, Government document suggesting that "*the UK believes the period's duration should be determined simply by how long it will take to prepare and implement the new processes and new systems that will underpin the future relationship.*"<sup>16</sup>

Whatever the eventual terms that are negotiated, and whatever the length of the transition period, it is accepted that withdrawal from the EU will demand a new

approach to our international competitiveness. China may well be the fastest growing economy, but the UK's single biggest trading relationship is with the EU: in 2016 trade with the EU accounted for 43% of Britain's exports of goods and services and 54% of imports.<sup>17</sup> Many of these imports are capital goods that are needed by domestic producers to improve productivity and efficiency - for example machinery for the windfarms of the so-called '*Energy Coast*'. Significantly windfarm operations are mainly in the hands of overseas companies with the largest and most controversial development, Hornsea Three, owned by the Danish firm Ørsted.<sup>18</sup>

Both sides of the Brexit debate have recognised that, whatever the final shape of the agreement, the UK must take steps to develop and offer high-value products and services that carry a premium. It would be undesirable (and probably impossible) to compete internationally on cost alone – characterised as a '*race to the bottom*'. High value products are produced by organisations with a skilled workforce and management practices that lead to high productivity; they then can reward their employees with good wages and offer job satisfaction.

**Brexit therefore delivers a sharp focus on an important underlying question: how, in North Norfolk can we develop the high-value organisations offering premium products that can compete internationally?** This question assumes particular significance when we consider the job prospects for the next generation.

### **Jobs for the future – the challenge for school-leavers**

All sections of society, irrespective of their political perspective, wish to see the emergence of higher value employment: well-paid jobs that develop the employee's skills and offer growth for the future. Here it is important to recognise that North Norfolk faces problems – especially for school-leavers who are seeking vocational employment, qualifications and training rather than a University education. As would be expected North Norfolk has a slightly lower proportion of young people than the national average (17.5% of the population are aged 0-19 compared with 23.5% for the UK as whole).<sup>19</sup> This still means that every year there is a large cohort of young people looking for life opportunities that could lead to personal fulfillment.

North Norfolk does not have a University within its boundaries: The University of East Anglia (UEA) is 24 miles south of the NNDC Cromer headquarters – a considerable commute for most North Norfolk residents. There are no Further Education institutes in the district at present so students must travel to Kings Lynn or Norwich if they wish to pursue vocational qualifications. Moreover North Norfolk performs comparatively badly in terms of apprenticeship places. Of 6,580 apprenticeship starts in the County of Norfolk in 2016/17 only 720 places were recorded for the NNDC area.<sup>20</sup> Depressingly overall figures are in decline – in part due to changes in government funding, involving the introduction of a levy. Apprenticeship starts in Norfolk decreased by 14% between 2016/17 and 2015/16.<sup>21</sup>

Experience gained from mentoring at local North Norfolk schools has underlined the scale of the problem as the following example illustrates. To promote

apprenticeships and assist those seeking one, the Government has produced an accessible web site and search tool ‘*Find an apprenticeship*’.<sup>22</sup> Using the tool opportunities in Chichester, Clacton and North Norfolk (the three constituencies identified earlier as having the oldest population) were compared. It is evident that, even in this context, young people in North Norfolk are at a considerable disadvantage.

Apprenticeship opportunities available within 30 miles of the post-code for the relevant Council Offices. Any level of apprenticeship. Disregarding schemes that are available on a national basis		
Keyword used in search tool	IT	Marketing
Chichester	33	19
Clacton	23	18
North Norfolk	7	8

## Some problem areas

### The rural economy

The emergence of high quality ‘next-generation’ jobs is a national challenge, but one that is more acute in rural areas; such areas often lack a manufacturing base or significant employers in the modern service sector. Withdrawal from the EU presents problems for these areas. Norfolk County Council has responded by promoting a new rural strategy ‘*Strong Roots New Growth*’. This sets out to: “*Achieve inclusive, sustainable rural areas which provide their inhabitants with a high quality of life through a dynamic economy, vibrant community and healthy natural environment.*”<sup>23</sup>

A launch event was held in November 2017 and a supporting report commissioned from Collison and Associates, a specialist consultancy. At the event Martin Collison, the lead consultant involved, specified three factors that required a strategy update: the vote to leave the EU; the introduction of the National Living Wage in 2016; and advancing technology. In a comprehensive presentation he drew attention to the low wage economy of rural Norfolk (male staff earning on average 20% below the national average); stressed the future importance of company competitiveness in the global economy (over 70% of agrifood exports go to Europe); and the need to consider the loss of EU funding through the Common Agricultural Policy - “*Brexit will change the funding landscape and change Norfolk’s trading relationship.*”<sup>24</sup>

Importantly, the presentation highlighted a critical issue that is an inevitable consequence of North Norfolk’s unbalanced economy: “*our ability to run core rural services e.g. care services for the elderly demographic concentrated in rural areas.*”<sup>25</sup>

Much of the ensuing debate around ‘*Strong Roots New Growth*’ was forward-looking and positive: opportunities could be grasped if labour productivity is increased. Here there is a way to go. Currently, productivity (defined as gross value added per filled job) is lower in North Norfolk (at £32,100) than in both Norfolk County (£36,800), and the East of England (at £41,600).<sup>26</sup>

## Labour and migration

Short-term labour difficulties cannot be ignored. Indeed David Davis, the Secretary of State responsible for exiting the EU, admitted the gravity of the problem during a visit to Estonia in February 2017. The following day the Guardian reported as follows:

*The UK is not about to “suddenly shut the door” on low-skilled EU migrants, Brexit secretary David Davis has reiterated. Davis said in a press conference in Riga, Latvia, that Britain wanted control over immigration but that it would only restrict free movement of people when it was in the “national interest”.*

*He said that it was not plausible that British citizens would immediately take jobs in the agriculture, social care and hospitality industry once the UK had left the EU and repeated comments made in Estonia on Monday that immigration restrictions would be phased in. He said: “It will be a gradual process. That will take some time; yesterday I said it will take years”.<sup>27</sup>*

### **The three sectors highlighted by the Secretary of State - agriculture, social care and hospitality - feature prominently in the North Norfolk economy.**

They will be considered in more detail below, with agriculture, where the policy debate is likely to be most intense left to last. There are many reports and commentaries on the sectors available: all underline the extent of the problem that North Norfolk could face, depending on the shape of agreed transition arrangements. David Davis’s speech leaves no room for doubt about the seriousness of the problems of managing without migrant labour.

There are difficulties in obtaining accurate statistics on EU migrants currently working in the UK labour force, especially at local levels, but information is available at national level.

In an article released in April 2017 the ONS (Office for National Statistics) presented a comprehensive analysis of UK, EU and non-EU nationals in the UK Labour market. Amongst the key findings were the following:

- In 2016 EU nationals were 7% of the labour market. In total 11% of the UK Labour market were non-UK nationals, so EU nationals accounted for some two-thirds of that total.
- *“There are higher proportions of international migrants in some industry sectors than others...14% of the wholesale and retail trade, hotels and restaurants are international migrants (508,000 (+/-64,000))”*
- Although there are a range of surveys that are able to capture the workforce in the agriculture industry *“One sector that is likely be under-represented is agriculture, forestry and fishing”...“None of these surveys are designed to capture the total number of long- and short-tem (seasonal) workers in the agriculture industry by nationality.”<sup>28</sup>*

EU nationals working in the UK must apply for a National Insurance (NI) number and here some statistics are available. Such statistics however only record individuals who are applying for a NI number not those who have applied in previous years and have retained their number (and also excludes those who have returned to their home country). In short this is a flow rather than a stock

concept. For the record these figures show the following Here data is available at Parliamentary Constituency level. There has been a steady recent trend of a steady flow. For North Norfolk 554 migrant registrations were recorded for 2013, 546 for 2014, 480 for 2015 and 666 for 2016.

## Social Care

Earlier sections have commented on the age profile in North Norfolk. Given this profile there will inevitably be rising demands for long-care. Some implications were explored in September 2017 report by the Healthcare practice of the consultancy firm, JLL: *'The Social Care Deficit: All our futures'*.<sup>29</sup>

JLL estimated that 64% of local authority areas were expected to require more staff than their forecast working age population growth would provide and, for the UK as a whole:

*We calculate that the social care sector will require an additional 1.22 million staff by 2036 of whom 540,000 will be needed just within the new care homes. However, over this period the total working age population will only increase by 1.39 million and the geographical distribution will be markedly uneven. London and the South East will be better placed to channel its workforce into care, but other regions will face serious labour shortages in the absence of immigration or labour-saving practices.*<sup>30</sup>

Some geographical implications were explored in a later section of the JLL report and the concept of the dependency ratio, defined as the dependent population as a percentage of the working age population, was introduced. In 2016 the UK's dependency ratio was calculated to be 55.7% rising to 68.6% by 2036. A list was produced of the ten areas with the highest predicted dependency ratios for 2036. **North Norfolk was ranked sixth on the list with a dependency rising from 82.8% in 2016 to 107.6% in 2036.**<sup>31</sup>

## Hospitality

As has been noted, tourism is a critically important source of employment in North Norfolk. According to one published survey, for 2016 there were 6337 'tourism generated' direct jobs, 1194 indirect jobs and 413 induced jobs (occupations with employees whose jobs are supported by tourism spend). Importantly these numbers are increasing annually.<sup>32</sup>

In March 2017 the consultancy firm KPMG produced a report for the British Hospitality Association: *'Labour migration in the hospitality sector'*.<sup>33</sup>

KPMG estimated that between 12.3% and 23.7% of the UK hospitality sector workforce is currently made up of EU nationals. Importantly, by 2029 the sector could face a total recruitment gap of over 1 million workers (over a quarter of the total employment) due to a lack of access of EU workers - unless it is able to replace EU workers with employees from other sectors, the unemployed and those currently not in the workforce. The report continued: *The hospitality sector currently needs around 62,000 new EU migrants per annum to maintain its current activities and to grow.*"<sup>34</sup> Moreover:

*the regions of the UK which are more reliant on EU nationals, such as London and the East of England are those with the lowest rate of*

*unemployment.... In short, even when there are unemployed workers in the UK, they tend to be located in the wrong place to mitigate for any future loss of hospitality workers from the EU. Not only that, UK workers tend to be less willing to move where the work is than employees from overseas who are, by definition, already fundamentally geographically mobile.*<sup>35</sup>

## Farming

No sector of the economy is subject to more organised and effective lobbying than agriculture. This will be directed at protecting farm incomes at a time when change is inevitable. It is likely to be successful.

On 4<sup>th</sup> January 2018 Michael Gove made an important speech: the Secretary of State for Environment, Food and Rural Affairs outlined his vision for British farming after Brexit.

There were two major elements to his address, which was delivered to the high profile annual Oxford Farming Conference. The first was that a new approach to payments and subsidies was needed: *“The ways in which we provide financial support to farmers have been far too bureaucratic – not helped by the ludicrous rules and red tape of the CAP that Defra must try to enforce.”*<sup>36</sup> and *“I believe that we should help landowners and managers to make the transition from our current system to a new approach for public goods over time”*. Importantly and powerfully *“The principal public good we will invest in is of course environmental protection”*.

The second element was to reassure his audience that income streams would be protected whatever the changes that lie ahead: *“we have guaranteed that the amount that we allocate to farming support – in cash terms – will be protected throughout and beyond this (transition) period right up until the end of this Parliament in 2022.”*<sup>37</sup> The following month the House of Commons Committee responsible for the scrutiny of agriculture presented a report in which they argued that the Government Department *“should consider providing a fund to support our food producing industry to adapt effectively to the challenge ahead.”*<sup>38</sup> This demand for subsidy has not been duplicated in any other sector of the economy.

This does not mean that any transition will necessarily be trouble-free if a hard Brexit applies. The House of Commons Committee reported that:

*In the event that the UK leaves the EU without a free-trade agreement, UK EU trade will proceed under WTO rules. Reverting to WTO tariffs will have significant impact upon agriculture as tariffs for agricultural products are higher than for other goods and services.*<sup>39</sup>

Moreover the agricultural sector will face the same problem as the other two sectors considered above: finding replacements for workers, particularly seasonal workers in the fruit and vegetable businesses. Indeed the Prime Minister, Theresa May, made a statement in the House of Commons in October 2017 in which she stated that the migration advisory committee is considering the reinstatement of a dormant seasonal agricultural scheme.<sup>40</sup>

## Conclusions

In this discussion note every attempt has been made to avoid the politics of Brexit and to concentrate on the facts. For many the demand for withdrawal from the EU reflects sincerely held beliefs on the desired future for our society. Included in that number will be some, possibly a majority, of elected members of the Norfolk County Council and the North Norfolk District Council.

**We must however all be aware of the consequences of this decision. North Norfolk will face big problems of adjustment and it is incumbent on us to anticipate and minimise any damaging effects – especially if they fall disproportionately on certain sections of the community (for example residents of care homes or young people entering the labour market for the first time).**

As is apparent from the discussion above:

- There is evident risk of severe labour shortages in key sectors of the local economy. If jobs become available they will be low-skilled and low-paid jobs, previously filled by migrant labour.
- There seems little short-term prospect of creating new jobs in high-value companies that can compete in any growing markets accessed under new trade agreements. Only a small number of such companies are present in North Norfolk and they are often overseas owned; none have evinced public support for withdrawal.

The conclusions for North Norfolk could not be clearer.

If Brexit, whether hard or soft, goes ahead there will be a desperate need for short-term intervention to ameliorate the problems and for long-term investment to create the opportunities. The latter will be resource intensive and, even then, it is hard to see how this could be accomplished.

For some this will be a price worth paying; others will take a different view.

**However, few, if any, Parliamentary Constituencies in Britain are more vulnerable to a hard Brexit than North Norfolk. It is arguably the area with the most to lose and the least to gain.**

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### The author

Martyn Sloman trained as an economist and specialised in management education and training. He held senior positions in both the public and private sectors. Latterly he wrote and taught extensively on skills development in the modern economy. Before his retirement Martyn held Visiting Professorships at three UK Universities and one South African University and was a Research Fellow at the Workforce Development Agency, Singapore. He has written seven books and many journal articles and has lectured and presented to Universities, Conferences and Colleges in twenty countries across five continents. See his website [www.martynsloman.co.uk](http://www.martynsloman.co.uk) for a fuller biography and for contact details.

## References and notes

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All references below accessed on 1<sup>st</sup> March 2018

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<sup>1</sup> There is a boundary anomaly in Norfolk. The North Norfolk Parliamentary Constituency is not contiguous with North Norfolk District Council (NNDC); the main difference is that the market town of Fakenham forms part of the NNDC but not the Parliamentary Constituency. All the areas however face similar economic and social challenges.

<sup>2</sup> [https://public.tableau.com/profile/house.of.common.library.statistics#!/vizhome/Populationbyage\\_0/Dataconstituencyincontext](https://public.tableau.com/profile/house.of.common.library.statistics#!/vizhome/Populationbyage_0/Dataconstituencyincontext)

<sup>3</sup> [http://www.constituencyexplorer.org.uk/explore/cross\\_section](http://www.constituencyexplorer.org.uk/explore/cross_section)

<sup>4</sup> <https://www.north-norfolk.gov.uk/tasks/economic-growth/find-out-about-the-economy-of-north-norfolk/>

<sup>5</sup> <https://newanglia.co.uk>

<sup>6</sup> Norfolk County Council, Norfolk Economic Intelligence Report October –December 2017 p. 2 downloadable at <https://www.norfolk.gov.uk/business/business-services/norfolk-economic-intelligence-report>

<sup>7</sup> [http://issuu.com/nakedmarketing1/docs/new\\_20anglia\\_20economic\\_20strategic?e=30940372/55099812](http://issuu.com/nakedmarketing1/docs/new_20anglia_20economic_20strategic?e=30940372/55099812) slide 12 of the presentation pack

<sup>8</sup> <http://www2.north-norfolk.gov.uk/minutes/Cabinet/31%20Oct%202016/Economic%20Growth%20Action%20Plan.pdf> p.4

<sup>9</sup> ibid p. 4

<sup>10</sup> ibid p. 5

<sup>11</sup> <http://www2.north-norfolk.gov.uk/minutes/Cabinet/31%20Oct%202016/BE%20Group%20report%20for%20Cabinet.pdf> p.2

<sup>12</sup> Norfolk County Council, Norfolk Economic Intelligence Report Jan-March 2017 p. 3 downloadable at <https://www.norfolk.gov.uk/business/business-services/norfolk-economic-intelligence-report>

<sup>13</sup> [http://issuu.com/nakedmarketing1/docs/new\\_20anglia\\_20economic\\_20strategic?e=30940372/55099812](http://issuu.com/nakedmarketing1/docs/new_20anglia_20economic_20strategic?e=30940372/55099812) slide 12 of the presentation pack

<sup>14</sup> In September 2017 The UK Statistic Authority drew attention to the misuse of official figures surrounding a controversial claim that £350m a week could go to the NHS after Brexit <https://news.sky.com/story/brexit-statistics-authority-boss-disappointed-at-boris-johnsons-350m-nhs-claim-11040516>

<sup>15</sup> The EU is a particular type of customs union. A single set of tariffs are applied to imported goods and members cannot determine their own trade deals with third parties. A single market involves a collection of rules, standards and agreements; capital, services, and, most controversially people may move freely within the single market.

<sup>16</sup> <https://www.thetimes.co.uk/article/britain-will-ask-eu-for-indefinite-brexit-transition-period-x6zlvblpc>

<sup>17</sup> <http://researchbriefings.parliament.uk/ResearchBriefing/Summary/CBP-7851>

<sup>18</sup> <http://www.edp24.co.uk/news/environment/north-norfolk-reacts-to-huge-offshore-wind-farms-by-vattenfall-and-orsted-1-5321242>

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- <sup>19</sup>[https://public.tableau.com/profile/house.of.common.library.statistics#!/vizhome/Populationbyage\\_0/Dataconstituencyincontext](https://public.tableau.com/profile/house.of.common.library.statistics#!/vizhome/Populationbyage_0/Dataconstituencyincontext)
- <sup>20</sup> Norfolk County Council, Norfolk Economic Intelligence Report October –December 2017 p. 5 downloadable at <https://www.norfolk.gov.uk/business/business-services/norfolk-economic-intelligence-report>
- <sup>21</sup> ibid
- <sup>22</sup> <https://www.findapprenticeship.service.gov.uk/apprenticeshipsearch>
- <sup>23</sup> <https://www.norfolk.gov.uk/what-we-do-and-how-we-work/policy-performance-and-partnerships/policies-and-strategies/business-policies/rural-development-strategy> slide 4
- <sup>24</sup> ibid slide 23
- <sup>25</sup> ibid slide 24
- <sup>26</sup> <https://www.north-norfolk.gov.uk/tasks/economic-growth/find-out-about-the-economy-of-north-norfolk/>
- <sup>27</sup> <https://www.theguardian.com/politics/2017/feb/22/uk-not-about-to-shut-the-door-on-low-skilled-eu-migrants-says-david-davis>
- <sup>28</sup> <https://www.ons.gov.uk/releases/migrationandthelabourmarketunitedkingdom2016>
- <sup>29</sup> <http://www.jll.co.uk/united-kingdom/en-gb/research/422/healthcare-social-care-deficit-all-our-futures-2017>
- <sup>30</sup> ibid p. 3
- <sup>31</sup> ibid p. 4
- <sup>32</sup> Jarques, S (2017) Economic Impact of Tourism 2016 Result – North Norfolk, Destination Research downloadable at <https://www.north-norfolk.gov.uk/media/3681/economic-impact-of-tourism-north-norfolk-report-2016.pdf>
- <sup>33</sup> <http://www.bha.org.uk/wordpress/wp-content/uploads/2017/05/BHA-EU-migration-final-report-170518-public-vSTC.pdf>
- <sup>34</sup> ibid p. 4
- <sup>35</sup> ibid p. 7
- <sup>36</sup> <https://www.gov.uk/government/speeches/farming-for-the-next-generation>
- <sup>37</sup> ibid
- <sup>38</sup> <http://www.bbc.co.uk/news/business-43088855>
- <sup>39</sup> ibid
- <sup>40</sup> [https://www.farminguk.com/news/May-suggests-seasonal-agricultural-workers-scheme-could-be-reintroduced\\_47724.html](https://www.farminguk.com/news/May-suggests-seasonal-agricultural-workers-scheme-could-be-reintroduced_47724.html)