

HULL CITYBUILD / HULL FORWARD ANNUAL REPORT 2008-2009 for Homes & Communities Agency and Communities and Local Government

Date Established: HCB April 2002; operating as Hull Forward from April 2008
Core Partners: Hull City Council (Member & Funder), Yorkshire Forward (Member & Funder), Homes & Communities Agency/English Partnerships (Funder)
Board members:
Chair: Ian McIntosh (to take up position May 2009) Deputy Chair / Acting Chair: Cllr Carl Minns, Leader Hull City Council Chief Executive Officer: John Holmes
Staff Numbers: 29
Business Plan Period: 2008-09
EDC Area (ha's): 7,145 (City administrative area)
Population: 256,000



General Overview

- **Chairman's Review**

Whilst the economic climate has given us a challenging first year as the Economic Development Company Hull Forward, nevertheless progress is still being made in securing Hull's renaissance.

Our waterfront regeneration plans have continued to bear fruit. Humber Quays is now established as the city's premier business address, already home to high profile tenants World Trade Centre Hull & Humber, PricewaterhouseCoopers, Barclays Commercial and Chameleon Business Interiors, shortly to be joined by Baker Tilly. The World Trade Centre is proving to be a popular business venue hosting numerous events since opening its doors in June 2008 and receiving over 330 enquiries, 70 originating through the global WTC network from Mexico, Nigeria, Poland, Italy, Ireland, the United States and Japan. Residents have also moved into the striking Freedom Quay marina-side apartment complex, which also boasts Hull's first £400k luxury penthouse. The preparatory work is progressing for Phase 2 of the development, with permissions in place and an application for further funding at an advanced stage of consideration through Government.

The St Stephen's retail and leisure development has continued to perform extremely well, bucking the trend nationally. Further restaurants, shops and leisure facilities have opened, footfall is increasing and sales figures are healthy. Late last year the development received the RICS National Regeneration Award, a fitting acknowledgement of its impact on the City. Officially opened this March by HM The Queen, the transport interchange has also received praise, being awarded the National Railway Heritage Award for Accessibility, and Station of the Year in the HSBC Rail Business Awards.

The economic climate has of course impacted on some of our larger scale development plans. Contingency plans and alternative approaches have however been agreed with partners and are being progressed.

The Fruit Market remains a key priority for us and our partners with £13m of additional funding being allocated to continue land acquisitions, infrastructure and area improvements. Developer interest remains positive with one development agreement signed for the prominent Marina Gateway land parcel, and negotiations active for proposals to revitalise the Central Dry Dock site. On the East Bank of the River Hull local development consortium Pure Urban was also unfortunately unable to progress its residential development, The Boom. However funding was secured to acquire the development site and construction of the new iconic footbridge continues ready for its installation later this year. The new 136-bed Premier Inn hotel is also almost complete, providing another positive new landmark for the City.

We remain focused on driving the city's economic development, with industry groups established and underpinning study work completed to identify opportunities and actions to support the healthcare technologies and renewable energy sectors. We continue to support the City Council in its work on ports and logistics, with Hull Forward in particular progressing work to unlock employment land potential north of the Port of Hull. Work also continues to support the existing business base, through our mainstream business development activity and through specific initiatives like the Bondholder scheme which, despite the climate, now boasts over 140 members contributing over £100,000 to the city's marketing effort. This marketing is resulting in a progressively more positive profile in the national media, with highlights over the year including features in the Economist, The Times, The Mirror and the Financial Times alongside a 12 page supplement in The Times.

Whilst the year has presented its challenges, overall I am pleased that progress has continued albeit at a slower pace than anticipated. The coming year will continue to be challenging. However, with the structure of the company in place and the commitment shown through our partners Hull City Council, the HCA and YF, I firmly believe we are well placed to continue to deliver our aspirations and realise Hull's long-term potential.

- **Chief Executive's Review**

2008-9 saw the launch of Hull Forward as the City's Economic Development Company. Hull Forward has begun its life by reviewing Hull Citybuild's strategy and legacy, confirming the ongoing delivery strategy which is now being articulated through an initial 5-year Business Plan. Partners remain fully committed to supporting Hull Forward in this work, and a process is underway to secure programme funding to streamline ongoing delivery.

In May 2008 Genecon LLP was commissioned to undertake an independent 'interim review' of Hull Citybuild, in line with DCLG recommendations. This identified the significant impact that Citybuild had made, concluding that Citybuild: delivered a step change in the local regeneration resource; has been successful in unlocking private sector potential; raised the bar in urban renaissance; and laid clear and robust foundations for the future – further detail is set out in 'Evaluation/Succession Planning'. Examples of Citybuild's impact on the city centre economy and environment include:

- Prime office rental values have risen by over 80% and retail rents by over 25%.
- Following delivery of St Stephen's, Experian has placed Hull within the top 25 shopping destinations nationally for the first time.
- 750,000 global businesses are accessible through World Trade Centre Hull & Humber, which is now fully operational at Humber Quays.
- The quality of the City Centre residential offer, vital to underpin the City's attractiveness as an investment location, moved up a notch with completion of Freedom Quay, including Hull's first £400k penthouse apartment.
- Residents, workers and visitors are benefiting from the continued programme of high quality public realm and infrastructure improvements along the waterfront, around the marina and across the A63/Castle Street.

Building on these foundations Hull Forward is now aiming to act as the catalyst to transform Hull into a global economic player. Highlights achieved over the year are set out below against key elements of our strategy to achieve this goal, with further detail provided under 'Key Projects'.

Transforming Hull City Centre into a thriving destination with world class business, visitor and leisure facilities, quality homes & public amenities.

We are continuing to develop the retail circuit & city centre core. Highlights include:

- **St Stephen's** was awarded the prestigious RICS National Regeneration Award in 2008, acknowledging its impact on the city's social, economic and physical regeneration. It faced stiff competition including The O2 Arena, St Pancras International and the Seewurfel project in Switzerland. The development is 90% let and is bucking the national trend of declining sales; over the year footfall has risen by 17% and the average transaction value by 15%.
- **Paragon Interchange** completed and was officially opened in March by HM The Queen, accompanied by the Duke of Edinburgh. The interchange has also won the National Railway Heritage Award for Accessibility, and Station of the Year in the HSBC Rail Business Awards.
- The **Whitefriargate** study considering future uses and interventions has completed, with implementation options now being progressed.
- We have continued to work with Citycare to develop proposals for a state of the art multi-purpose health centre at **Albion Square**.

We are reconnecting our impressive waterfront, maximising its massive potential. Highlights include:

- **Humber Quays** – the World Trade Centre became fully operational; PricewaterhouseCoopers, Barclays Commercial and Chameleon Business Interiors took occupancy; and lease agreed with Baker Tilly. The Freedom Quay apartment scheme completed, averaging capital values of over £230 psf. A project team was appointed to take forward Humber Quays Phase 2, to include an international brand 4 star-hotel, additional homes and offices alongside a prestigious waterside restaurant.

- **Hull Marina** – public realm improvement to the west and north of the Marina completed; Wellington Street swing bridge connecting Humber Quays to the Fruit Market refurbished and open – commended in BURA's Waterways Renaissance Awards 2009 (Historic Environment category); lock gates refurbishment and further environmental improvements north of the marina along Castle Street underway.
- **Fruit Market** – new fruit traders' facility on-site at Priory Park; funding secured from HCA (£10.45m allocation) and YF (£2.7m) to continue comprehensive redevelopment following decision not to proceed with the Central Land Parcel scheme agreed with preferred developer igloo (as a result of impact of the economic climate on the proposals); development agreement signed with ispace for the Marina Gateway parcel, planning application to clear and temporarily landscape the site submitted; discussions ongoing on the other 3 Phase 1 parcels; former 'Bonus Electrical' site cleared and temporarily landscaped; temporary uses identified and leases agreed for two properties to encourage footfall; public realm scheme in preparation for implementation in time for the 'Clipper' round the world yacht race.
- **East Bank** - construction of the iconic, McDowell + Benedetti designed footbridge underway; landscaping scheme for Scale Lane (the western approach to the bridge) designed, including public art, lighting and public realm; link scheme between the bridge and Tower Street on the east bank in preparation, providing access from the footbridge to the new Premier Inn hotel (itself nearing completion) and The Deep; YF funding secured and site of the former Boom scheme acquired following the developer's decision not to proceed due to the economic downturn.

Accelerating Hull's economic development by focusing on key growth sectors – Ports & Value Added Logistics, Healthcare technologies and renewable energy.

- **Healthcare** – sector study completed and results under consideration to inform priorities; discussions progressed around Telehealth cluster development and related overseas links; continuing business engagement through the Healthcare Technologies Industry Group and company visits programme; national PR campaign undertaken and marketing materials produced promoting opportunities and strengths; continuing close working with the sub-region's local authorities and Yorkshire Forward.
- **Renewable Energy** – sector study completed identifying key opportunities and issues to inform priorities; continuing business engagement through the industry-led Humber Renewables Network and company visits programme; joint working with KHCC and YF to help deliver renewable energy targets through major capital programmes; marketing materials developed and exhibitions with Team Humber Marine Alliance held to promote strengths and opportunities to target markets.
- **Ports & Value Added Logistics** - continued working with KHCC (which is taking the lead on this sector) to maximise the opportunities presented, including progressing rail freight investment and reviewing administration arrangements for Team Marine Humber Alliance. Ongoing work to unlock employment land potential north of the port area.

Establishing new relationships to secure investment into the city, acting as the first point of contact for enquiries.

- Activity continued to identify new business opportunities, including targeting potential hotel developers and operators, and promoting the city as a potential location for the relocation of government organisations.
- Targeted marketing, connection into the global World Trade Centre network and attendance at MIPIM all maintained Hull's visibility to potential investors.
- We continue to work with developers to meet demand for call centre enquiries, offering particular opportunities for Hull and responding to findings in the Citybuild-commissioned IBM study (2006) informing our economic strategy.
- Ongoing assistance to local companies seeking GBI funding through YF (one investment recommended for approval; two under discussion with YF).

Growing relationships with the existing business base to enable expansion and maximise opportunities.

- 343 FTE jobs have been created or safeguarded over the year, including 100 jobs as a result of Reckitt Benckiser's new R&D facility, and 191 businesses have been assisted.
- The Bondholder scheme grew by 38% over the year, with over 140 members contributing over £100,000 to the city's marketing effort.

Creating a hub for international trade & investment, through World Trade Centre Hull & Humber, putting Hull on the global stage.

- The WTC facility at One Humber Quays opened in June 2008 and continues to raise its profile, offering a wealth of trade services to businesses. Over 330 trade and investment enquiries have been received, 69 of which were received through the global WTC network.

- Highlights since opening include:
 - Advisory group of 15 regional business leaders appointed.
 - Service offer enhanced through various service partners - translation and interpreting, legal advice, international finance and tax advice, market research.
 - Three business sponsorships secured against business facilities.
 - Overseas trade missions, events and other support promoted and facilitated business links with Tamil Nadu (Southern India) and Qatar.
 - Shortlisted for the New Venue of the Year category of the Yorkshire Business Tourism Awards.

Area of Operation

- **Strategic Framework Overview**

Whilst the shape of Hull Forward's ongoing Business Plan is still being finalised through the Board and key partners, the City Centre Masterplan continues to provide the key focus for physical renaissance. Adopted in 2004 the Masterplan provides a flexible investment framework addressing the key factors causing the city centre's underperformance, which in turn was acting as a drag on the wider local economy. The Masterplan's key objectives are:

- a unified and compact city centre core
- a city centre re-united with its Humber Estuary waterfront
- a prime office core
- a large city centre population
- a strong retail circuit
- a strong and lively River Hull Corridor within the compact city centre
- new icons to lift the heart of the city

These objectives will be met through the progression of comprehensive regeneration within five 'Strategic Development Areas' selected in view of their significant development and investment potential - Humber Quays, Fruit Market, East Bank of the River Hull, Albion Square & Heart of the City and the Retail Circuit (Quay West & St Stephen's). An over-arching landscape framework binds the city centre together to create a unified core. The vision and progress made in each of these is set out in 'Key Projects' below.

Complementing the physical regeneration focus, Hull Citybuild had concentrated on strengthening the City's economic performance, identifying and harnessing its key strengths to enable the City to compete nationally and internationally. Following a competitiveness assessment undertaken by IBM Plant Location International in 2006 and subsequent Economic Development Action Plan produced by the International Economic Development Council in 2007, the economic agenda has been set, with a particular focus on healthcare technologies, renewable energy and ports and value added logistics as the key sectors with the greatest opportunity for wealth and job growth. This agenda has been taken through into Hull Forward's strategic objectives, along with a commitment to continue to work with important sub-sectors and the existing business base to support and maximise indigenous opportunities, increasingly important in the current economic climate. Work has also been undertaken to identify and take forward strategic employment sites with an initial focus on the City's eastern and western employment corridors.

Progress made against the key city centre projects, sector development work and other key economic initiatives is set out under 'Key Projects' below. Target outcomes are set out in 'Evaluation/Succession Planning' below.

Key projects

Project Name & Description	Current Position on Previous Milestones at 31 st March 2009	Project Milestones 1 st April 2009 to 31 st March 2010
Humber Quays - creating a mixed use urban quarter and prime office core, maximising the advantages of this site's magnificent estuary frontage.	Phase One <ul style="list-style-type: none"> - Office space 65% let. - WTC Hull & Humber fully operational - Freedom Quay residential scheme completed. - Railway Street/Marina west side environmental improvements complete. - Wellington Street swing bridge complete and operational – commended in the Waterways renaissance awards 2009. - Infrastructure improvements to the Marina lock gates started on-site. 	Phase One <ul style="list-style-type: none"> - Complete the lettings of One and Two Humber Quays. - Secure an operator for the ground floor retail/commercial unit. - Marina lock gates completed. - Maximise opportunities for use of plaza and other public realm for Clipper. Phase Two <ul style="list-style-type: none"> - Secure funding for infrastructure works package.

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	<ul style="list-style-type: none"> - Increased footfall to plaza and waterfront areas resulting from public realm enhancements, WTC events and in association with City events (eg: fireworks, Maritime and Jazz festivals). <p>Phase Two</p> <ul style="list-style-type: none"> - Outline planning consent secured for Ph2 development. - Reserved Matters consent secured for infrastructure and public realm works. - Land acquisition from ABP completed. - Progression of the 4-star hotel opportunity hampered by the economic downturn, though operator interest has been retained. - Nikal identified as preferred developer for the next building incorporating restaurant, offices and apartments, including delivery of plaza café – economic climate impacting on delivery timescales. <p>Albert Dock Estate</p> <ul style="list-style-type: none"> - Discussions underway for ongoing waterfront development strategy. - Market assessment for a potential cruise terminal concluded with positive results. Next-stage studies underway. 	<ul style="list-style-type: none"> - Procure and begin implementation of infrastructure works package. - Establish way forward for the business hotel and Nikal scheme. <p>Albert Dock Estate</p> <ul style="list-style-type: none"> - Complete cruise terminal feasibility work to inform the long term development strategy. - Commission master planning exercise in partnership with ABP.
<p>Fruit Market – through sensitive treatment this heritage area will provide a new lively community with a mix of city living, workspace for creative industries and small businesses, hotels, leisure and shopping.</p>	<p>Land Assembly</p> <ul style="list-style-type: none"> - 85% of required land/property acquired by agreement. - CPO case developed – recommended to be taken forward by KHCC (decision to proceed subject to receipt of Cabinet approval). <p>Wholesale Fruit Market</p> <ul style="list-style-type: none"> - Start on-site secured for the new fruit market facility at Priory Park. <p>Phase 1 Development Schemes</p> <ul style="list-style-type: none"> - Central Development Parcel – agreement not taken forward with Igloo due to economic climate (revised scheme non-OJEU compliant). Additional funding secured from YF and HCA to progress acquisitions, infrastructure and other preparatory work. Revised disposals strategy under consideration. - Marina Gateway - development agreement signed (ispace). - Central Dry Dock - discussions and scheme design ongoing (Wykeland). - Baltic Wharf – discussions ongoing. 	<p>Land Assembly</p> <ul style="list-style-type: none"> - KHCC decision to proceed with CPO <p>Enabling works</p> <ul style="list-style-type: none"> - New fruit traders' facility completed. - Procure & implement public realm works <p>Phase 1 Development Schemes</p> <ul style="list-style-type: none"> - Conclude the development agreement for the Central Dry Dock land parcel - Agree revised disposal strategy for remaining land parcels <p>End Users</p> <ul style="list-style-type: none"> - Stimulate end user interest in restaurant, niche retail and office operations, and residential uses. <p>Burnett House</p> <ul style="list-style-type: none"> - Market revised scheme and secure developer

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	<ul style="list-style-type: none"> - Wellington Mart – revised strategy to assemble parcel. Temporary uses identified and leases agreed on 2 properties. <p>Phase 2</p> <ul style="list-style-type: none"> - Bonus Electrical site clearance and archaeological surveys complete. - Phase 2 development to follow completion of Phase 1 sites and clarification of A63 Castle Street long-term solution. <p>End Users</p> <ul style="list-style-type: none"> - Continued to market opportunities and secure interest for restaurant, niche retail and office operations, and residential uses. <p>Burnett House</p> <ul style="list-style-type: none"> - Planning application subject to Highways Agency holding direction pending long-term solution (land-take requirements) for the A63 Castle Street. Scheme to be revised to omit the land at risk. 	
<p>East Bank of the River Hull – creating a major new residential community in a spectacular riverside location, with supporting commercial uses, public realm and new feature foot/cycle bridges, maximising public use of the riverside asset and stitching this neglected area back into the heart of the city.</p>	<p>River Hull Impoundment Scoping Study</p> <ul style="list-style-type: none"> - Stage 2 completed with indication of potential positive results. Further work on hold due to likely capital costs. <p>River Hull Footbridge</p> <ul style="list-style-type: none"> - Consents secured, manufacture procured and underway. - Options for initial occupancy of the bridge pod agreed and being pursued. - Improvements to Scale Lane Staithe and the adjoining boardwalk designed as part of the R. Hull footbridge project. <p>Pure Urban</p> <ul style="list-style-type: none"> - Hotel nearing completion. - As a result of the economic downturn, the developer took the decision not to progress The Boom. - YF funding secured and site acquired to enable installation of the bridge and future comprehensive development. - Proposals revised to facilitate East bank link between the bridge landing point and Tower Street (enabling access to the hotel and The Deep) 	<p>River Hull Footbridge</p> <ul style="list-style-type: none"> - Complete manufacture, installation and commissioning of the bridge - Secure initial letting of the bridge pod - Procure and implement Scale Lane Staithe and boardwalk public realm enhancement <p>The Boom</p> <ul style="list-style-type: none"> - Hotel development completed - Procure and implement link scheme between the footbridge and Tower Street

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<p>Retail Circuit (St Stephen's & Quay West) – major retail and leisure investment supported by public realm to connect the city's existing and planned major retail anchors, creating a sensible retail circuit to encourage pedestrian flows around the city centre and establish Hull as a major retail and leisure destination.</p>	<p>Transport Interchange</p> <ul style="list-style-type: none"> - Winner – Station of the Year, HSBC Rail Business awards 2008. - Winner – Accessibility Award, National Railway Heritage awards 2008. <p>St Stephens</p> <ul style="list-style-type: none"> - Hull Truck Theatre practically complete. - Residential phases on hold pending change in economic climate. - Retail/leisure scheme 90% let. - Effective PR and communications maintained. - Best Regeneration Project in Yorkshire – RICS Pro-Yorkshire Awards 2008. - Winner - RICS National Regeneration Award 2008. <p>Quay West</p> <ul style="list-style-type: none"> - Henderson Global has taken a decision to dispose of their landholding at Princes Quay and Quay West. Continuing to work alongside partners to support the disposal. <p>Whitefriargate</p> <ul style="list-style-type: none"> - Study commissioned to identify policy and project interventions to influence Whitefriargate's function. <p>BID (Business Improvement District)</p> <ul style="list-style-type: none"> - Continuing input to BID proposals and marketing through Board membership and other working relationships. - Financial support provided for appropriate capital investments. 	<p>St Stephens</p> <ul style="list-style-type: none"> - Hull Truck Theatre complete. - Retail/leisure units 95% let. <p>Quay West</p> <ul style="list-style-type: none"> - Work with prospective purchasers of Princes Quay/Quay West to preserve Quay West's regeneration potential. <p>Whitefriargate</p> <ul style="list-style-type: none"> - Complete study, and agree implementation strategy with partners. - Support empty unit displays enhancements via BID allocation. <p>BID (Business Improvement District)</p> <ul style="list-style-type: none"> - Continue input to BID decisions through BID Board representation and management of the HF funding allocation - Ensure continued alignment of HF-funded BID activities with wider KHCC-led and agreed strategy.
<p>Albion Square & Heart of the City – providing a lively quarter of office, leisure, cultural and civic uses complementing the surrounding Georgian architecture, and incorporating major public realm improvements to key civic spaces.</p>	<p>Albion Square</p> <ul style="list-style-type: none"> - Lease of premises to PCT/Citycare completed to facilitate new city centre multi-purpose health centre. - Outline planning consent secured for Citycare multi-purpose health centre - Dialogue maintained with adjoining owners regarding future comprehensive development approach. <p>Learning Quarter</p> <ul style="list-style-type: none"> - Hull College's revised estates strategy completed. - Support given to the College in their bid for LSC funding to remodel the campus; awaiting outcome of funding decisions. - KHCC-procured History Centre on-site. <p>Queens Gardens and Queen Victoria Square</p>	<p>Albion Square</p> <ul style="list-style-type: none"> - Continue to support Citycare in implementation of the multi-purpose health centre scheme - Commission planning & development brief for the wider regeneration site <p>Learning Quarter</p> <ul style="list-style-type: none"> - Identify ongoing support required pending results of funding bids. - History Centre completed. <p>Queen's Gardens & Queen Victoria Square</p> <ul style="list-style-type: none"> - Work with KHCC as appropriate to support the improvement scheme at Queen's Gardens and any further public realm and lighting enhancements (Queen's Gardens, Queen Victoria Sq)

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	<ul style="list-style-type: none"> - Short term improvement of Queen's Gardens drawn up (KHCC scheme). 	
<p>City Centre-wide – a range of actions providing the policy context and essential infrastructure to support successful development within the Strategic Development Areas noted above.</p>	<p>Planning Policy Guidance</p> <ul style="list-style-type: none"> - City Centre AAP Publication Document produced; final consultations completed prior to submission to Government. - Final amendments identified to finalise Supplementary Planning Guidance. <p>Strategic Landscape /Infrastructure Framework and Public Art</p> <ul style="list-style-type: none"> - Key elements of the strategic landscape framework implemented (Railway St/ Marina; Wellington St swing bridge connecting Humber Quays and Fruit Market). - Public artists appointed as part of Humber Quays Ph2 to integrate public art into the public realm, working with the public art team based at arc. - Infrastructure to service city centre events installed in key locations via BID - Support to KHCC, the DMO and BID to promote city centre events programme. - Review of landscape design SPG ongoing to provide a framework for public realm outwith the SDAs. - Representation on Public Artworks Group alongside arc and KHCC. <p>A63 Castle Street & Infrastructure</p> <ul style="list-style-type: none"> - HA options for the long-term solution drawn up and out to public consultation. - Short-term environmental improvements to Castle St close to completion. - Further highways study underway to review capacity and requirements informing ongoing works including Mytongate junction. - Utilities study underway to confirm capacity and investment requirements. <p>Digital Model for City Centre</p> <ul style="list-style-type: none"> - Decision not to proceed in view of costs and competing priorities. <p>Supply Chain/Local Labour Benefits</p> <ul style="list-style-type: none"> - Ongoing support to Construction Works - Local employment requirements identified for Humber Quays Ph2 infrastructure contract. - Local contractor procured to implement Marina environmental works. <p>Cultural Projects</p> <ul style="list-style-type: none"> - Economic impact undertaken regarding 	<p>Planning Policy Guidance</p> <ul style="list-style-type: none"> - Submit City Centre AAP; support KHCC in the examination in public, as required. - Finalise SPG documents for 'interim adoption'. <p>Strategic Landscape /Infrastructure Framework and Public Art</p> <ul style="list-style-type: none"> - Continue implementation of elements of the strategic landscape/infrastructure framework and public art strategy at Humber Quays, Fruit Market, East Bank. - Continue joint working with KHCC, the DMO and BID to support a co-ordinated programme of events and activities for key streets and public areas. <p>A63 Castle Street & Infrastructure</p> <ul style="list-style-type: none"> - Continue to work with the Highways Agency to identify and secure commitment for a long term solution. - Complete Castle Street environmental improvements - Identify ongoing requirements for Mytongate, finalise design and commence procurement - Complete utilities study and identify a clear schedule of requirements - Input to any studies procured by the KHCC regarding city centre movement, access & parking <p>Supply Chain/Local Labour Benefits</p> <ul style="list-style-type: none"> - Continue support to Construction works as appropriate. - Incorporate local employment requirements into Humber Quays Ph2 infrastructure contract procurement. <p>Cultural Projects</p> <ul style="list-style-type: none"> - Identify any appropriate cultural element to the central Dry Dock scheme <p>Monitoring and Evaluation Framework</p> <ul style="list-style-type: none"> - Hull Forward Business Plan to reflect HCB Interim Review recommendations - Company performance management framework established

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	<p>potential cultural/tourism use within the Fruit Market – funding requirements under consideration by partners</p> <p>Monitoring and Evaluation Framework</p> <ul style="list-style-type: none"> - Citybuild interim review completed with ways forward identified to inform ongoing Hull Forward business plan 	
<p>Economic development – targeting development of priority growth sectors; supporting other locally important sectors and supply chains; supporting business engagement; promoting inward investment.</p>	<p>Healthcare</p> <ul style="list-style-type: none"> - Industry engagement secured through Healthcare Technologies Industry Group and company visits programme. - Study commissioned to assess potential and demand for services and facilities – results being analysed at time of writing. - Discussions progressed to support Telehealth cluster development. - Marketing collateral produced, PR campaign delivered through national and trade media - Strategic approach promoted with sub-regional local authorities and YF. <p>Renewable Energy</p> <ul style="list-style-type: none"> - Industry engagement secured through Humber Renewables Network and company visits programme. - Study completed to identify key opportunities and issues, and inform priorities. - Close working with KHCC to support renewable energy targets through major capital programmes. - Marketing collateral produced, PR campaign delivered through national and trade media - Exhibitions held with Team Humber Marine Alliance to promote opportunities to target markets. - Strategic approach promoted with sub-regional local authorities and YF. <p>Ports & Value Added Logistics</p> <ul style="list-style-type: none"> - Continuing support to KHCC to maximise opportunities. <p>Other sectors</p> <ul style="list-style-type: none"> - Continued work to grow relationships with the indigenous business base, safeguarding businesses, enabling retention and expansion within the City - Continuing support to the Food & Drink sector – eg: management of Malmo Food Innovation & Technology Park - Supply chain opportunities identified to support priority sectors 	<p>Healthcare</p> <ul style="list-style-type: none"> - Business Plan interventions identified following study results. - Maintain industry links through sector group and company visits. <p>Renewable energy</p> <ul style="list-style-type: none"> - Business Plan interventions identified following study results. - Maintain industry links through sector group and company visits. <p>Ports and Value added Logistics</p> <ul style="list-style-type: none"> - Continue to support KHCC in its sector development activity <p>Other sectors</p> <ul style="list-style-type: none"> - Business Plan priorities agreed and interventions/actions identified. - Identify supply-chain requirements and interventions to support key sectors. <p>Business engagement/support</p> <ul style="list-style-type: none"> - Maintain Bondholder membership levels. - Maintain sector-specific engagement through healthcare and renewables work. - Continue business support including GBI application support. - Progress a Proof of Concept programme <p>Inward investment</p> <ul style="list-style-type: none"> - Continue targeted marketing support. - Identify and progress specific proposals meeting call centre demand. - Set up joint Location Solutions initiative Hull & East Riding of Yorkshire

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	<p>Business engagement & support</p> <ul style="list-style-type: none"> - Sector development groups and company visits programmes initiated for key sectors as above. - Continued growth in Bondholder membership, attendance at events and support to the City's marketing effort. - Continued support to companies including assistance in SFI / GBI grant applications. - Initial work undertaken for a Proof of Concept scheme, now being developed <p>Inward investment</p> <ul style="list-style-type: none"> - Continued targeted marketing – priority sectors, hotel operators, restaurants etc. - Ongoing work with developers to meet demand from call centres. 	
<p>World Trade Centre – creating a hub for international trade and investment, placing Hull on the global stage through membership of the global World Trade Centers Association network.</p>	<ul style="list-style-type: none"> - WTC venue fully operational. - Services offer enhanced with formation of panels providing language, legal, financial/tax advice, market research. - Private sector advisory group established. - Full engagement of sub-regional local authorities secured; enquiry handling protocol agreed. - New overseas partnerships and opportunities developed including Tamil Nadu and Qatar. - Future events, seminars, trade missions programme outlined with partners. 	<ul style="list-style-type: none"> - Finalise 2009/10 business plan. - Finalise and promote 2009/10 events etc programmes. - Develop bespoke inward trade missions approach/programme tied to Hull & Humber sector strengths. - Work with WTCA to identify appropriate developmental support and additional revenue streams.
<p>Employment Projects – bringing forward development sites and appropriate projects supporting the economic strategy, in particular focusing on the priority Eastern and Western employment corridors</p>	<p>Eastern employment corridor</p> <ul style="list-style-type: none"> - Ongoing support to Humbrol site landowner in site disposal – site marketed, enquiries assessed and one proposal being actively pursued - Supporting YF in disposals of plots at Burma Drive – Heads of Terms issued on 3 of 5 plots - Delays to Hedon Road Maternity Hospital site due to HA holding direction pending assessment of A63 impacts/requirements - Opportunities around Fenners site identified; on hold pending clarification of planning policy following Area Action Plan options – representations made through statutory planning process <p>Western employment corridor</p> <ul style="list-style-type: none"> - Options for the former Birds Eye site identified, including potential connection to Wiltshire Road/Priory Park enhancing the strategic opportunity. Clarity on the 	<p>Eastern employment corridor</p> <ul style="list-style-type: none"> - Finalise disposal of Humbrol site - Finalise disposal of 3 plots at Burma Drive and issue Heads of Terms on the remaining 2 plots - Identify way forward for Hedon Road Maternity Hospital site - Work with the Local Planning Authority to clarify the proposed policy position affecting strategic employment land at Fenners <p>Western employment corridor</p> <ul style="list-style-type: none"> - Way forward for the Birds Eye site identified

Project Name & Description	Current Position on Previous Milestones at 31 st March 2009	Project Milestones 1 st April 2009 to 31 st March 2010
	planning policy position needed through draft Core Strategy process (private sector residential proposal anticipated).	

Good News Opportunities For The Year Ahead

Whilst still formally constituted as Hull Urban Regeneration Company Ltd, the company began operating as Hull Forward the Economic Development Company in April 2008 with an expanded remit covering economic development across the entire City as well as continuing work with the physical renaissance in the City Centre.

The company has three founding members – Hull City Council, Yorkshire Forward and the Homes and Communities Agency. Board membership has been confirmed with all positions filled, including the recently appointed Chairman Mr Ian McIntosh. There is a strong private sector representation with seven private sector directors, alongside the public, volcom, HE and FE sectors. This configuration provides an appropriate platform for the organisation to move forward positively and proactively.

Hull Forward's role is to:

- Operate with a city-wide remit, expanding on Hull Citybuild's nationally acclaimed work, to form the foundations of Hull's future;
- accelerate Hull's economic development by driving forward our three key growth sectors - Ports & Value Added Logistics, Healthcare Technologies and Renewable Energy;
- establish new relationships to secure investment into the city and will always be the first point of contact for enquiries;
- continue to grow relationships with our current business base to enable their expansion and to ensure all opportunities are maximised;
- transform Hull City Centre into a thriving destination with world class business, visitor and leisure facilities, quality homes and public amenities;
- Create a hub for international trade and investment, through World Trade Centre Hull & Humber, putting Hull on the global stage.

During 2009/10 Hull Forward will:

- Finalise the initial 5-year programme incorporating new delivery priorities identified by key partners during 2008/9, and secure programme funding to enable ongoing delivery against Business Plan priorities
- Continue to deliver City Centre regeneration within the City Centre Masterplan investment framework
- Continue delivery of key sector and business development priorities
- Finalise arrangements to further expand of the organisation's remit following co-location of the Council's Knowledge Economy Team and incorporation of Team Humber Marine Alliance, promoting the sub-region's marine sector.

Good news stories are anticipated in regard to:

- The opening of Hull Truck Theatre and further lettings within the St Stephen's retail/leisure scheme
- Relocation of the Fruit Traders and visible change commencing within the Fruit Market including start on-site of a major programme of public realm and infrastructure works
- Commencement of the next phases of physical infrastructure work at Humber Quays
- Installation of the iconic River Hull footbridge linking to and opening up opportunities on the East Bank
- Increasing footfall along the waterfront following continued public realm enhancement, the Clipper yacht race, which starts from Hull this autumn, and opening of the River Hull footbridge towards the end of the year.

Links to Other Programmes

Hull Forward's key priorities are embedded at a strategic level within the Humber City Region Development Plan/Northern Way, the Regional Economic Strategy, the Regional Spatial Strategy, YF's Hull & Humber Geographic Investment Plan, and the City's draft Core Strategy under the Local Development Framework. Collectively these promote development of Hull as a regional centre, and of healthcare technologies, environmental technologies/renewables and advanced ports & logistics as the economic sectors with the greatest potential for growth. These objectives are supported through the work of the Humber Economic Strategy Group (comprising the sub-region's four Local Authorities, YF and the University of Hull), the Local Strategic Partnership and KHCC. This strategic framework is informing a range of complementary investment, from sub-regional marketing to skills development initiatives, funded through various partners and agencies including YF, Jobcentre Plus, the LSC, and One Hull through the Working Neighbourhoods Fund.

Whilst physical development activity continues to be focused on the city centre, we work closely with other agencies in the City to jointly develop more prosperous, sustainable, healthy and happy communities. To achieve this we work with our core partners KHCC, YF and the HCA, and a range of other partners including Gateway Pathfinder (regarding housing market renewal in West Hull), Building Schools for the Future, Hull Citycare (delivering the NHS LIFT programme), One Hull (the LSP), Hull & Humber Chamber of Commerce, the Institute of Directors, Hull Business Forum and Construction Works (focusing on local employment issues and activity). Integration of the key capital programmes underway in the City – through Hull Forward, Gateway, BSF, LIFT and the Council (Decent Homes etc) – is being enhanced through regular meetings at Chief Executive level and articulation of a Hull Investment Plan.

We also continue to work with a range of partners to deliver a varied and exciting events programme to attract further footfall. These partners include KHCC, Visit Hull & East Yorkshire (the DMO for Hull & East Riding), Hull Business Improvement District (BID), Hull & Humber Clipper (sponsored by YF) and the Yorkshire International Business Convention.

Evaluation/ Succession Planning

Progress against key output targets

In May 2008 Genecon LLP, supported by property specialists CB Richard Ellis, was commissioned to undertake an Interim Review, as recommended by DCLG. The review aimed to provide an independent and objective evaluation of Citybuild's performance over its life, an assessment of 'strategic added value', and to identify lessons learned to inform Hull Forward's development and operation. Its timing was considered appropriate in view of the stage reached in Masterplan delivery, the national context (Sub-National Review and CSR), the transition to Hull Forward and ongoing discussions locally around creating a Local Asset Backed Vehicle. The project Steering Group comprised the funding partners, DCLG, Hull Citybuild/Hull Forward and independent chairman Prof Stuart Gulliver, an eminent economist and urban regeneration practitioner.

The review was published in November 2008. The findings revealed the key role that Citybuild played in transforming the city's economy and developing Hull as an attractive investment location. By working beyond its physical remit, Citybuild shaped the city's future economic strategy, enhanced the City's image, and made significant progress in the City Centre, particularly in the office and retail market - as a result of Humber Quays Phase 1, headline office rents had increased by over 80%, and following delivery of St Stephen's Experian placed Hull within the top 25 shopping destinations nationally for the first time. Citybuild's work in securing business engagement through the Bondholder scheme, and in delivering the World Trade Centre as key infrastructure to support the City's positioning globally were also highlighted as particular examples of added value. These factors had previously influenced the judges' decision to name Citybuild 'National Regeneration Organisation of the Year' in the 2007 Regeneration awards sponsored by Property Week, Building, Regeneration and Building Design.

Genecon drew out particular 'key messages' against the background of principles established by the URC programme nationally, concluding that Citybuild has:

- delivered a step change in the local regeneration resource
- been successful in unlocking private sector potential
- raised the bar in urban renaissance
- laid clear and robust foundations for the future

Despite the significant changes evident in the City Centre, there is still much more to do. Work continues with schemes at Humber Quays, the Fruit Market, East Bank and Albion Square to maintain momentum to work towards ongoing City Centre Business Plan targets, against which progress is monitored:

Output	Business Plan target	Citybuild achievement	Hull Forward target to 2016
Jobs created & safeguarded	7,229	1,378	5,851
Land unlocked (ha)	41	19	22
New office space (sqm)	58,705	6,040	52,665
New retail/leisure space (sqm)	103,708	52,000	51,708
Number of new residential units	2,536	51	2,485
Number of new hotel beds	500	120	380
Private sector investment (£m)	642	188	454

Broader economic development targets are in the process of being agreed following completion of essential study work, incorporation of new delivery priorities (such as the Team Humber Marine Alliance initiative and progression of the digital and

creative sector as vital underpinning element), and consideration of changing economic circumstances.

Broader impact – socio-economic outcomes

The Interim review incorporated consideration of socio-economic outcomes, divided into the themes of people, business and place, and building on the baseline analysis undertaken previously by Tribal Consulting. Whilst the review found the economy to be generally moving in the right direction, a number of key areas need to be addressed - these align with the broader economic development functions being pursued under Hull Forward. Key indicators with progress against baseline are illustrated in the table below.

Indicator	Baseline (2002)	Latest figure	Trend 2002-08
People			
Total City population	250,100	256,200	+
% working age population educated to NVQ4+	12%	15%	+
% University of Hull graduates retained in Hull	21%	25%	+
Claimant count in Hull	5%	4%	+
Claimant count in Myton Ward (City Centre proxy)	11%	12%	-
Economic activity rate as % of working age popn	75%	72%	-
Average full time median gross weekly wage	£324	£397	+
Business/property			
Huggins' Competitiveness Index	399 th	380 th	+
GVA per head	£14,154	£15,836	+
VAT registrations per 10,000 population	18	17	-
Office rental levels	£9psf	£16.50psf	+
Retail rental values	£135psf	£170psf	+
Retail yields	£6.75psf	£6.50psf	+
No of hotels	10	12	+
Place			
Hull District IMD rank	14 th	16 th	+
% SOAs within 2% most deprived SOAs nationally	50%	62%	-
Overall annual value of tourism	£166.7m	£212.8m]	+

At the time of the review, the City's population was found to be increasing and the upper end skills base improving with stronger performance at NVQ4 levels and increased graduate retention levels. Unemployment was reducing at the district level and wage rates had increased significantly, albeit they remained low in relation to comparator levels. Levels of service sector and higher value add employment was increasing, although not at the desired rate, and the City's day visitor economy was growing significantly. However, the City continued to rank very poorly as a competitive business location and although GVA was increasing, it still lagged behind regional and national averages. There were continuing low levels of enterprise activity in terms of business start-up rates. The City Centre also still contained severe pockets of deprivation. Significant challenges therefore remain, and these issues need to be addressed by Hull Forward and its partner agencies.

The property market analysis undertaken by CB Richard Ellis outlined the performance of the local property market during Citybuild's lifetime, and the organisation's impact in terms of 'adding value' from a property market perspective. Overall this revealed a positive picture, noting a strengthening of the local property market with the gap closing on comparator locations:

- Humber Quays has delivered a step change in the City Centre office market with headline rents increasing by over 80%;
- Hull's residential market has narrowed the 'value gap' with comparator locations and in some cases exceeded values achieved in Doncaster, Bradford and parts of Leeds. The City Living offer in Hull remains relatively limited, however, and the apartment pipeline will be adversely affected by the current economic climate;
- St Stephen's has been a significant driver in strengthening the retail offer and diversifying the range and improving the quality of goods on offer. This has enabled Hull to keep a pace with comparator locations. When delivered, Quay West should greatly enhance Hull's retail offer further; and
- the leisure market (hotels) is still very much fledging within Hull, and there is significant growth potential. It has improved between 2002-2005, with further hotel development in the pipeline. Moving forward the City needs to attract a 4 star hotel operator to diversify and strengthen its offer and this is proposed at Humber Quays.

CBRE also noted high quality design at both Humber Quays and St Stephen's as a distinguishing factor. The bar has been raised and these schemes have successfully demonstrated that latent demand exists for high quality facilities. The level of

development activity in the City had increased dramatically with the level of proposed speculative development (prior to the economic downturn) almost unimaginable in 2002.

However, CBRE warned of the impact of the downturn on pipeline projects. From data available at the time, there was limited evidence of impact on values, though there had been a slowdown of new City Centre residential schemes being brought forward and increased void rates in vacant commercial property. The increased aversion to risk from the principal financial institutions has impacted on schemes and will continue to provide a challenging climate. On a more positive note CBRE considered that Hull is, perhaps, fortunate that it does not carry excessive stock levels of offices and residential, though the retail sector may be more adversely affected.

As the Hull Forward business plan is further refined and specific activities around the economic development agenda are agreed, an appropriate list of indicators will be developed for ongoing monitoring and evaluation purposes.

Regional Comparison

Trends in key indicators (selected due to their relationship to the Citybuild/Hull Forward agenda) at City and regional level are considered below using information supplied by the HCA. Against these indicators, particularly strong progress can be seen against average earnings, average house prices, employment and unemployment rates and increases in commercial and retail floorspace. In all these cases the rate of improvement is higher than the regional average, indicating that the City's various regeneration strategies and programmes had been coming together to make a real impact. Maintaining these trends will be a major challenge in the current economic climate. The continuing low level of VAT registrations and the very low rate of improvement in comparison with the regional average is a particular cause for concern, and indicate the importance of bringing together the physical regeneration and economic development agendas. It should be noted though that Hull Forward's role in enterprise is more from the perspective of stimulating larger scale opportunities in growth areas rather than providing the intensive business support required by new and fledgling businesses. Hull Forward maintains partnership links through the LSP and various business fora to support the enterprise agenda.

Key indicator	2004 Figures		2008 Figures		Rate of change	
	Hull	Region	Hull	Region	Hull	Region
Average earnings £	17,999	18,397	22,419	22,009	+ 24.6%	+19.6%
Average house price £	59,078	131,496	101,265	193,004	+71.4%	+46.8%
Employment rate %	66.4	74.89	77.8	75.06	+17.2%	+0.3%
Unemployment rate %	33.6	25.11	22.2	24.94	-33.9%	-0.8%
IMD score	38.24	26.38	35.76	25.07	-2.48 pts	-1.31 pts
Income support %	16.64	12.06	8.32	5.65	-50%	-53.2%
Claiming benefits %	21.71	17.01	19.99	15.03	-7.9%	-11.6%
No VAT registrations	450	593	465	692	+3.3%	+16.7%
Industrial floorspace sqm	2,701,000	43,691,000	2,777,000	43,365,000	+2.8%	-0.7%
Commercial floorspace sqm	440,000	6,988,000	572,000	8,423,000	+30%	+20.5%
Retail floorspace sqm	179,932	11,520,000	380,647	9,808,000	+111.5%	-14.9%

It is difficult to draw direct comparisons across URCs/EDCs, with each organisation responding to a particular range of circumstances and challenges. For this reason the Interim Review undertaken by Genecon did not carry out an in-depth comparison across URCs, though Genecon did consider that "it would be fair to say that the scale of the challenge faced by Citybuild, in terms of both the local economic and political environment, was severe in comparison to a number of other URCs" (Interim Review p.89). Notwithstanding this, it is interesting to consider the rates of change for key indicators against the changing picture at the national and regional levels, and for Sheffield and Bradford:

- Average earnings – steady progress is shown for the region and its URCs/EDCs, though Hull has experienced a faster rate of change since 2004, and in 2007 exceeded the regional average, closing the gap to the national average to a slightly greater extent than in Sheffield and Bradford.
- Average house price – strong progress above the regional rate of change, though Bradford has experienced the most dramatic increase since 2004.
- Employment and unemployment rates – whilst the regional and national averages have remained fairly constant Hull and Bradford have made particularly good progress; an uplift in employment and corresponding reduction in unemployment levels 2007-8 are likely to reflect new job creation at St Stephen's.
- VAT registrations – the picture has been mixed for the three URC/EDC areas, though Hull has experienced a better rate of

change than Sheffield and Bradford since 2005. Regionally and nationally the rate of change has been climbing more steeply however, indicating that business creation will remain a common issue for all the region's URC/EDC areas.

- Floorspace – across the region there has been a higher rate of increase of commercial floorspace than nationally, with Hull experiencing the highest rate of change of the three URC/EDC areas, in part reflecting progress at Humber Quays. The change in retail floorspace has been slowing regionally and nationally as major schemes have completed, but again Hull has experienced the greatest increase in recent years reflecting new retail developments across the city, including St Stephen's.

All the region's URC/EDC areas have therefore displayed positive and accelerated rates of change overall. The quality of development is just as important as the quantity, with the qualitative aspect being a common objective across URCs/EDCs. In Hull this has been recognised through the various awards secured over the past year:

- St Stephen's - Best Regeneration Project in Yorkshire at both the RICS and Insider Property Industry Awards; National Regeneration Award (RICS); Best Regeneration project (Property Weekly's Yorkshire & North East Property Awards).
- Paragon Interchange - National Railway Heritage Award for Accessibility; Station of the Year, HSBC Rail Business awards.
- Wellington Street Bridge – commended in the BURA Waterways renaissance awards.
- World Trade Centre Hull & Humber - shortlisted for the Yorkshire Business Tourism Awards 'New Venue of the Year'.

These build on previous awards secured, including recognition through RICS for One Humber Quays and for Citybuild awarded 'National Regeneration Organisation of the Year' in the 2007 Regeneration awards sponsored by Property Week, Building, Regeneration and Building Design.

Notes on financial & outputs returns submitted with this report:

- As agreed with the HCA, Hull Citybuild achievement is retained within the returns under 'previous years'.
- Returns include additional related work (eg: Hull IDP), which is not factored into the summary of direct city centre achievements noted in the narrative report.
- Adjustments have been made to reflect actual achievement identified in the Hull Citybuild Interim Review, and to reflect adjustments to key project proposals to align to current Business Plan assumptions and priorities. Future public sector funding assumptions are included where they are known.
- Funding levels have been reduced to reflect known funding allocations with no forward forecast (previously forecasts were included). Output targets have not been adjusted downward to match known funding availability however.
- We have amended our approach to safeguarded jobs. The original targets were based on the multiplier effect of jobs created. Since it is very difficult to measure and monitor multiplier effects the safeguarded jobs target has been removed. However we continue to monitor and report safeguarded jobs where we have tangible evidence of them.
- The Hull Forward Business Plan is evolving. New project areas will be added, with targets, in future returns (eg: key sectors, employment projects).

Direct Outputs	Lifetime (as Hull Forward from 1 st April 2008)	Achieved up to 31 st March 2009	As a % of lifetime outputs
Public sector investment (£m)	72	10.6	14.72
Private sector investment (£m)	457	6.1	1.33
Commercial floor space (sq m)	115,296	785	.68
Jobs created	6,190	142	2.29
Housing units	2545	51	2
Land brought back into use (ha)	25.1	0.9	3.6

Lifetime gearing 6.3

Brokered Outputs	Lifetime (as Hull Forward from 1 st April 2008)	Achieved up to 31 st March 2009	As a % of lifetime outputs
Public sector investment (£m)	13.9	11.3	81.3
Private sector investment (£m)	36.1	0.1	0.27
Commercial floorspace (sqm)	0	0	0
Jobs created	69	69	100

Housing units	0	0	0
Land brought back into use (ha)	0.4	0	0

Finance

Audited Income and Expenditure account for period 1st April 2008 to 31st March 2009

	Budget Annual £000	Actual YTD £000	Forecast Result £000
Income/Funding			
HCA	345	441	441
RDA	1237	1210	1210
Council	1034	1086	1086
ERDF	0	0	0
Other	160	128	160
Total	2776	2865	2897
Expenditure			
Staff Costs	1687	1433	1433
Office/Premises Costs	293	218	238
Travelling/Transport	37	31	31
Consultants	51	45	45
PR/Marketing	453	407	407
Other	164	334	365
Project costs	-	263	263
Total	2725	2731	2782
Surplus/Deficit	51	134	115

Notes:

Average No of Staff.(ft/pt and secondment)

Funding provided by CLG directly