

Enterprise Zone Memorandum of Understanding

THIS AGREEMENT is dated [] 2016

PARTIES

1. **THE SECRETARY OF STATE FOR COMMUNITIES AND LOCAL GOVERNMENT** whose principal address is 2 Marsham Street, London, SW1P 4DF (**Secretary of State**);
2. Each of the local authorities for the area of the Enterprise Zone, whose names and principal addresses are listed at Schedule 1 (together the **Relevant Local Authorities**)
3. The Local Enterprise Partnership for the area of the Enterprise Zone, whose names and principal addresses are listed at Schedule 2 (where a local enterprise partnership does not have corporate status then the Accountable Body who acts as the representative is listed) (**together with the Local Enterprise Partnership**)

BACKGROUND

- A The Secretary of State has the power to declare an area to be an Enterprise Zone.
- B. Enterprise Zones are single or multiple sites designated for business development which may offer business rate discounts or enhanced capital allowance for new businesses locating on the sites. Enterprise Zones are on sites which would ordinarily not be expected to generate significant business growth nor generate any business rates without incentives and /or dedicated local stakeholder support. Any increase from business rates income which arise from the development of an Enterprise Zone site will not be affected by business rates reform, reset or redistribution for a period of 25 years.
- C. A local enterprise partnership is a voluntary partnership between local authorities and businesses to help determine local economic priorities and lead economic growth within their local area. This includes arrangements for the establishment and operation of Enterprise Zones. As some local enterprise partnerships are not corporate bodies, a local authority may act as an accountable body on their behalf.
- D. In agreement with the Local Enterprise Partnership local authorities responsible for all or part or all of an Enterprise Zone use any increase in business rates they collect from each Enterprise Zone site to support the further development of the Enterprise Zone and neighbouring areas.
- E. Taking account of the application included within the attached schedule and other representations made by the Local Enterprise Partnership, the Secretary of State with the agreement of the Chancellor of the Exchequer offers the Local Enterprise Partnership and Relevant Accountable Bodies the right to set up and establish arrangements for the operation of the Enterprise Zone subject to the terms and conditions set out within the other paragraphs of this Memorandum of Understanding. To allow all parties to review their interests, in the first instance this Memorandum of Understanding extends to 2020.

IT IS AGREED THAT:

1 DEFINITIONS

In this Memorandum of Understanding the following words and phrases shall have the following meanings:

“Accountable Body” means a local authority organisation(s) responsible for one or more aspects of the operation of the Enterprise Zone in line with plans agreed with the Local Enterprise Partnership.

“Application” means the application for enterprise zone status submitted to the Secretary of State by the Local Enterprise Partnership on [DATE] 2015 (which may be amended from time to time after the date of this Memorandum of Understanding) and includes each of the representations at Schedule 3 of this Memorandum of Understanding (in the event of conflicting statements, Schedule 3 and then the latest validly made variation shall take priority).

“Enterprise Zone” means one or more sites which under the Regulations (as amended from time to time) are able to offer specific business incentives and permitted by the Secretary of State to market themselves as such.

“Regulations” means 'Capital Allowances (Designated Assisted Areas) Order 2016', 'Non-Domestic Rating (Designated Areas) Regulations 2016', and 'Non-Domestic Rating (Rates Retention) Regulations 2013'.

“Relevant local authorities” means a local authority on which all or part of an Enterprise Zone is situated and as a consequence collects business rates from businesses in operation on that site.

“Term” means the earlier of 31 March 2020 or the date of the Secretary of State, each of the Local Enterprise Partnership or each of the Relevant Local Authorities giving written notice to the other parties to this Memorandum of Understanding of its intention to terminate the Enterprise Zone status under clause 5.

2 AGREEMENT TO SET UP AND OPERATE AN ENTERPRISE ZONE

Having relied upon the representations made by the Local Enterprise Partnership in the Application, the Secretary of State offers the Local Enterprise Partnership and the Relevant Local Authorities the right to set up and operate the Enterprise Zone for the Term, subject to the terms of this Memorandum of Understanding, including the right to benefit from the following business incentives:

- Permitting the Relevant Local Authorities to retain 100% of any business rate increase which accrues for a period of 25 years from the commencement date (this being [START DATE]) of the Enterprise Zone, providing that such sums are directed towards the development of the Enterprise Zones and thereafter towards the Local Enterprise Partnership's other identified growth priorities;
- Central government will reimburse the cost incurred by Relevant Local Authorities in providing a 100% business rates discount for a period of up to five years, to any business which sets up operations within the Enterprise Zone site before 31 March

2022, and is able to receive the support within the State Aid De Minimis threshold (or other limitation applicable by law);

- As an alternative to the reimbursement of business rates, and up until 31st March 2020, Central Government will reimburse the Relevant Local Authorities the cost of allowing businesses occupying an Enterprise Zone sites within an Assisted Area to count 100% up to €125 million of their first years' expenditure on qualifying plant and machinery assets against taxable income as an Enhanced Capital Allowance (**ECAs**)
- The Local Enterprise Partnership and Relevant Local Authorities can together agree to other local authorities benefitting from the benefits of the Enterprise Zone during the Term provided they have entered into an inter-party agreement as set out in 3.2 (a) and meet the relevant requirements in the regulations. In this situation, notice shall be given to the Secretary of State of the arrangement.

3. TERMS AND CONDITIONS

3.1 The Relevant Local Authorities and the Local Enterprise Partnership agree, having undertaken due investigation, that at the date of this Memorandum of Understanding:

- (a) The statements within the Application are accurate;
- (b) they are not aware of any information which is likely to materially undermine the ability of the Local Enterprise Partnership and the Relevant Local Authorities to deliver the Enterprise Zone in accordance with the Application and achieve the outputs; and
- (c) they are not aware of any information, which is likely to significantly delay the Local Enterprise Partnership in delivering the Enterprise Zone in accordance with the Application or achieving the outputs.

3.2 The Relevant Local Authorities and Local Enterprise Partnership confirm, having undertaken due investigation, that:

- (a) they have obtained or shall use all reasonable endeavours to promptly obtain necessary approvals, authorisations, consents, exemptions, licences, permits, permissions (including planning permission) or registrations necessary to deliver the Enterprise Zone in accordance with the Application;
- (b) they have or will secure the expertise and capacity to set up and operate the Enterprise Zone in accordance with the Application;
- (c) they will undertake all the steps to set up and operate the Enterprise Zone and confirm that each of these shall be achieved compliantly (including but not limited to achieving compliance with applicable procurement, state aid, planning law and all rules relating to the collection and distribution of business rates, discount, and use of business rates for investment); and

- (d) they will deliver the relevant incentives at Schedule 4 for the period set out in the Application and this Memorandum of Understanding.

3.3 The Relevant Local Authorities and the Local Enterprise Partnership agree to:

- (a) organise and promote a governance group for the Enterprise Zone which is able to make strategic and operational decisions. This shall include representatives of each relevant local authority and shall meet at least quarterly (“**Governance Group**”); and
- (b) enter into Memorandum of Understandings with each other which set agreed objectives and priorities for the Enterprise Zone as well as terms necessary to give effect to this Memorandum of Understanding (for example, provisions covering the use of business rates retained by local authorities and how local authorities will use their general power of competence to support the Enterprise Zone, including but not limited to Compulsory Purchase Orders, simplified planning regimes, development orders, Joint Ventures and borrowing to support investment and arrangements for the provision of monitoring data). Where during the Term, new local authorities become involved in the Enterprise Zone or the legal status of Local Enterprise Partnerships and local authorities involved in the Enterprise Zone changes, the Secretary of State requires that the Local Enterprise Partnership uses all reasonable endeavours to enter into new Memorandum of Understandings under this clause. Copies of these Memorandum of Understandings should be sent to the Secretary of State within 50 days of execution.
- (c) to use government subsidies provided for the Enterprise Zone (including the subsidy provided under this Memorandum of Understanding and the Regulations) for the objectives of the Enterprise Zone and in compliance with relevant laws.

3.4 Implementation Plan

The Local Enterprise Partnership in consultation with the Relevant Local Authorities shall design and submit to the Secretary of State a 5 year implementation plan (which sets out the major steps and the individual(s) and organisation(s) who will be responsible to set up, operate and deliver the objectives and priorities which have been agreed for the Enterprise Zone) no later than 31st March 2017.

3.5 The **Cities and Local Growth Unit** shall support:

- (a) the set up and delivery of the Enterprise Zone (in particular through the contact for the Enterprise Zone, which is [redacted] (E-mail: Telephone: [redacted]) (who shall advise on the procedures for establishing the zones and resolving issues, which may arise in relation to government funding or legal arrangements. The Local Enterprise Partnership and Relevant Local Authorities shall be informed if there is a change in the Cities and Local Growth Unit team contact.

- (b) Enterprise Zones by providing information on the Enterprise Zone to the market via press releases, its national Enterprise Zone website, Twitter account and other media; and
- (c) Collaboration, by inviting senior leaders from all England's Enterprise Zones to meet to discuss progress, challenges and good practice with senior government officials and Ministers

this support shall be provided up until 31 March 2020 and may be renewed or subject to alteration after that date.

3.6 The Relevant Local Authorities and Local Enterprise Partnership shall:

- (a) send the Cities and Local Growth Unit contact the details of the primary point of contact ("**Local Enterprise Zone Contact**", a named representative agreed with the Local Enterprise Partnership) for the Enterprise Zone within 20 Working Days of entering into this Memorandum of Understanding. The Cities and Local Growth Unit contact shall be informed if there is a change in the Local Enterprise contact.
- (b) authorise the Local Enterprise Contact to discuss progress of the Enterprise Zone with the Cities and Local Growth Unit contact either in face-to-face or telephone meetings at least once a quarter. Such meetings shall be two-way enabling both parties to understand progress of the Enterprise Zone. Share information about the wider Enterprise Zone network and any issues which might adversely affect the planned progress of the Enterprise Zone.
- (c) take all reasonable steps to allow the Cities and Local Growth Unit team contact (or another team member in their place) to attend the Governance Group meetings (as mentioned at clause 3.5(a) including providing information on the date and location of meetings and sending papers which will be discussed. The Cities and Local Growth Unit team contact shall be entitled to decide whether they attend in an observer capacity or as a participant at the Governance Group meeting.

3.7 Marketing

The Relevant Local Authorities and the Local Enterprise Partnership agree to use all reasonable endeavours to

- (a) promote the Enterprise Zone;
- (b) share with the Secretary of State a marketing plan for the Enterprise Zone within six months of entering into this Memorandum of Understanding; and
- (c) use DCLG and Enterprise Zone logos within marketing communications and signage.

3.8 Monitoring

The Relevant Local Authorities and the Local Enterprise Partnership agree to use all reasonable endeavours to complete the management information at

Schedule 5 within 21 Working Days of the commission from DCLG, which will be quarterly at the end of January, April, July and October.

4. CHANGES

All changes to the text of the application or this Memorandum of Understanding must be approved by the Secretary of State in writing prior to the relevant change being deemed to be effective. Until such time as a change is made in accordance with this clause, the parties shall, continue to perform this Memorandum of Understanding in compliance with its terms before such change.

5. TERMINATION

- (a) The Secretary of State shall be entitled to suspend or withdraw the right of any or all of the Local Enterprise Partnership and / or the Relevant Local Authorities to market an Enterprise Zone if, acting reasonably, the Secretary of State is of the view that a party has acted in a way which significantly damages the reputation of the Enterprise Zone Programme or if there has been a material breach of this Memorandum of Understanding.
- (b) The Relevant Local Authorities and Local Enterprise Partnership with the Memorandum of Understanding involved in delivering the Enterprise Zone is entitled to ask for the Enterprise Zone status to be rescinded by submitting notice in writing.

6. GOOD FAITH AND COOPERATION

Each party covenants with the others that they shall act with the utmost good faith towards the other, shall comply with reasonable requests for information in relation to the Enterprise Zone submitted from time to time and will not do anything which would deliberately put the other in breach of its obligations under this Memorandum of Understanding.

7. MISCELLANEOUS

Nothing in this Memorandum of Understanding shall constitute a partnership or joint venture between any of the parties.

ACCEPTANCE

This Memorandum of Understanding has been entered into on the date stated at the beginning of it.

Signed for and behalf of

SECRETARY OF STATE FOR)

COMMUNITIES)

AND LOCAL GOVERNMENT)

Authorised Signatory: _____

Print Name: _____

1. Local Enterprise Partnership Accountable body signs here

Signed for and in agreement with

LOCAL ENTERPRISE PARTNERSHIP BY THE ACCOUNTABLE BODY

[Insert AUTHORISED BODY DETAILS]

Authorised Signatory: _____

Print Name: _____

(Add more as required)

Signed for and in agreement with

Name of Local Authority

[Insert LOCAL AUTHORITY DETAILS]

Authorised Signatory: _____

Print Name: _____

.....

Signed for and in agreement with

Name of Local Authority

[Insert LOCAL AUTHORITY DETAILS]

Authorised Signatory: _____

Print Name: _____

.....

The following parties are aware of the requirements of this Memorandum of Understanding (including the Application) and shall support and assist development and delivery of the Enterprise Zone throughout the Term, but due to not having the required legal personality

[LOCAL ENTERPRISE PARTNERSHIP]

Authorised Signatory:

Print Name:

[LOCAL ENTERPRISE PARTNERSHIP]

Authorised Signatory:

Print Name:

SCHEDULE 1 - RELEVANT LOCAL AUTHORITIES

SCHEDULE 2 – LOCAL ENTERPRISE PARTNERSHIP

SCHEDULE 3 KEY INFORMATION ON [INSERT NAME] ENTERPRISE ZONE / EXTENSION [FROM NAME OF LOCAL ENTERPRISE PARTNERSHIP APPLICATION]

General	
Name of Enterprise Zone	West of England Enterprise Zone
Name of Local Enterprise Partnership	West of England
Relevant local authorities	Bristol City Council Bath and North East Somerset Council

Fill out information from the application form Q C.8 What is the Local Enterprise Partnership’s agreed approach, with the relevant local authorities, about how the retained rates will be used to support development on the Enterprise Zone?

Briefly explain your financial or investment plan for how (for example, through borrowing or development of a recycling fund) and when the retained rates will be used.

Additional Business Rates growth generated from this EZ bid will be treated in the same way as the Retained Rates through the West of England City Region Deal, under which, Bristol City, Bath & North East Somerset, North Somerset and South Gloucestershire Councils are allowed to retain 100% of the growth in business rates raised in the Enterprise Zone/Areas over a 25 year period to create an Economic Development Fund for the West of England and to manage local demographic and service pressures arising from economic growth.

Each participating authority pays an annual growth figure to South Gloucestershire Council, as the Accountable Body for the Business Rates Pool, representing business rates collected in the Enterprise Areas in excess of an agreed baseline figure. Retained funds are distributed or invested annually in accordance with the Regulations and the BRPPA as:

- Tier 1: to ensure that no individual Authority is any worse off than it would have been under the national local government finance system,
- Tier 2: to an Economic Development Fund (EDF) for reinvestment within the designated areas
- Tier 3: for the relief of demographic and service pressures associated with growth.

It has been agreed that, in respect of the expansion sites, the Tier 2 funds secured will be allocated to a separate infrastructure fund from both the existing £500m EDF and from the Bristol City Council Temple Quarter extension Fund.

However, the existing governance arrangements including the one front door approach to assessing and approving infrastructure investment proposals at the appropriate WoE LEP Board meeting will be maintained.

The governance arrangements provide timely and binding decisions, with due clarity, transparency and accountability. A Strategic Leaders Board involving the three Council Leaders and the Bristol Mayor meets formally, in public, and is the ultimate joint decision making body approving a programme of schemes to support the development of the Enterprise Zone. An Investment Board, comprising the four Authority Chief Executives and four business representatives then makes individual investment decisions including the granting of 'Programme Entry' and business case sign off.

Individual Authorities sponsoring an infrastructure scheme are able to borrow to fund the upfront investment with reimbursement of capital and financing costs made from the EDF over a period of the fund.

Fill out information from the application form Q E 1. Please describe the governance arrangements for the proposed Enterprise Zone, clearly setting out the name and job title of the Senior Responsible Officer for delivery of the Zone, the governance structure and explain how progress will be owned by the Local Economic Partnership Board.

Enterprise Zone Programme Board

Stephen Robertson, West of England LEP (Chair)
Patricia Greer, Chief Executive LEP
Tim Warren, Leader B&NES Council
Marvin Rees, Mayor of Bristol
Stephen Hughes, City Director BCC
Ashley Ayre, Chief Executive B&NES
Barra Mac Ruariri, Regeneration Strategic Director
Louise Fradd, Strategic Director of Place

B&NES EZ Directors Board

Louise Fradd (Chair)
Andrew Pate, Strategic Director Resources, B&NES
John Wilkinson, Div. Director Community Regeneration, B&NES
Martin Shields, Div. Director Env. Services, B&NES
Lisa Bartlett, Div. Director Planning, B&NES
Derek Quilter, Div. Director Property, B&NES
Simon Martin, Bath EZ Programme Director, B&NES
Ben Woods, Somer Valley & Keynsham EZ Lead Officer, B&NES

Bath EA Development Group
Simon Martin (chair)

**Somer Valley Keynsham EZ
Development Group**
Ben Woods (Chair)

Fill out information from the Application form from Q E.2 capacity and skills you will make available to deliver the Enterprise Zone on a day-to-day basis, including the job titles and names of each of the staff members in the Local Enterprise Partnership and the relevant local authorities and the total costs of this staff team.

The existing Bath City Riverside Enterprise Area and Somer Valley Cluster has established a clear and dedicated leadership process to ensure the Council maintains focus on the many outcomes BaNES is seeking to achieve through delivery of the Enterprise Area. This will be extended to cover the proposed new sites.

Projects already involve a number of different delivery mechanisms and partnerships ranging from multi-agency public sector partnerships to public-private and private sector delivery vehicles.

Specific skills and resources appropriate to the scale of the ambition and complexity of projects are managed via a dedicated Programme Management Board (PMB) which leads and directs each respective project via its own Project specific Steering Groups (PSG).

Assisting the PMB, Council Working Groups, including the established Bath Western Riverside Steering Group ensure that the Council delivers in a coordinated approach.

EZ Programme Governance

Reporting to the Councils Strategic Management Team (SMT) and administrations formal governance arrangements, delivery of the EZ Programme will build on existing structures for the delivery of the Enterprise Area and the Somer Valley:

Programme Management Board (PMB)

Consisting of SMT and invited officers with cross directorate and strategic partnership attendance to assist the delegated decision makers in directing Programme and Project Delivery.

Project Steering Group (PSG)

Project specific leadership group that governs delivery of individual projects and administers contracts, agreements and partnerships contracted for the delivery of the project. Chaired by the nominated Project Sponsor(s) and assisted by Client Lead Officer and Project Director/Manager.

The EZ Programme governance will link to the Council corporate capital, risk and decision making processes in the normal way. BaNES have an established Project Management system including regular reviews, risk mitigation, cost management, resource monitoring and clear reporting to senior level decision makers where required.

This approach will provide clarity of roles and responsibilities within the agreed programme priorities and define how the Councils One Council Approach be managed.

Project Portfolio

The table below sets out the project portfolio currently established within BaNES for the proposed Bath, Keynsham and Somer Valley EZ based on a realistic phased delivery schedule. Allocation of a dedicated project manager indicates that a project is funded and has moved from scoping and definition to delivery.

Project Name	PLACE-CLIENT	PLACE - CLIENT		RESOURCES - DELIVERY	
		Leadership Role	SRO	Project Sponsor	Client Lead
Bath City	Louise Fradd	John Wilkinson	Simon Martin	Derek Quilter	Richard Marsh
Somerdale	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	John Cox
East of Keynsham	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	John Cox
Keynsham Peninsula	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	Caroline Lightfoot
Old Mills	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	John Cox
Welton Bibby Baron	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	John Cox
Westfield	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	Monique Clarke
Bath Business Park	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	Caroline Lightfoot
MSN Enterprise Park	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	Monique Clark
Welton Hollow	Louise Fradd	John Wilkinson	Benjamin Woods	Tim Hewitt	Monique Clarke

Q E3 will you gather data that will allow the Local Enterprise Partnership and local authorities to monitor progress of the Enterprise Zone, for example this could include on delivering new jobs, business, and investment?

A dedicated monitoring facility is already in place to manage the City Deal investment programme coordinated by Business Support and Development Manager John Cox. The lead officers listed below have an oversight of programme monitoring as part of their day to day responsibilities within the Enterprise Area project team or affiliated teams in Planning, Economic Development and Business Rates.

As delivery of the Bath, Keynsham and Somer Valley EZ expands the officers John Cox, Jack Fennell and Anna Garner will switch to full time monitoring roles with Neil Best and Mark Angus fulfilling any statutory monitoring roles as per their current roles.

Project outcomes will be monitored based on the following framework which has been developed based on BIS/DCLG guidance. The following table details the project outcomes which would be monitored and the approach to evaluation.

	Category	Sub Category	Monitoring Method	Lead Officer
1	Employment space (not new committed in sqm)	Office	LPA Annual	Jack Fennell (Project Team) Ed Winter (Planning Team)
		Industrial: general/light	Monitoring Report (AMR)	
		Industrial: warehouse/distribution		

		Retail		
		Leisure		
2	Employment space (completed in sqm)	Office	LPA Annual Monitoring Report (AMR)	Jack Fennell (Project Team) Ed Winter (Planning Team)
		Industrial: general/light		
		Industrial: warehouse/distribution		
		Retail		
		Leisure		
3	Under construction	Total land under construction	LPA Annual Monitoring Report (AMR)	Jack Fennell (Project Team)Ed Winter (Planning Team)
4	Jobs created (actual if known)	Office	Annual business survey	John Cox (Project Team) Anna Garner (Economy Team)
		Industrial: general/light		
		Industrial: warehouse/distribution		
		Retail		
		Leisure		
5	Business rates	Total Business Rate Value	Project team annual monitoring report	Jack Fennell (Project Team) Mark Angus (Business Rates)
		Change from last year		
6	Investment	Public Sector investment	Project team annual monitoring report	John Cox (Project Team)
7	Housing	Net dwellings completed	LPA Annual Monitoring Report (AMR)	Jack Fennell (Project Team) Ed Winter (Planning Team)
		Net dwellings committed		
		Dwellings under construction		
8	Land converted & created	Amount of land developed or redeveloped	LPA Annual Monitoring Report (AMR)	Jack Fennell (Project Team) Neil Best
		New floor space created		

		Refurbished floor space		(Planning Team)
		New and refurbished floor space		

An additional business occupier database for all site occupiers in the Zone will be created by B&NES council.

The database would contain the following information, and be updated every six months through discussion with site developers / owners, in order to track and monitor development progress of the Zone:

- Business occupier name
- Address on site
- Floor space occupied (Floor Area Basis according to HCA guidance)
- Use Type (according to HCA guidance)
- Description of type of business activity undertaken
- Standard Industrial Classification of business
- On-site employment
- Investment

The database would enable full monitoring of the EZ's development progress, and would provide the essential information necessary to develop accurate progress indicators on key economic measures such as:

- Jobs
- GVA
- Incomes
- Floor space
- Investment
- Number of businesses

Information would be provided on a site by site basis, as well as for the entire EZ.

A report would be provided every quarter to the LEP containing an update of the Zone's progress on the above key indicators / measures.

Q E5 Briefly set out your plan for marketing the sites to occupiers and/or investors, in the case of multiple site zones being clear if they will be marketed in clusters or in stages.

The marketing and branding strategy is focused on maximising both commercial and economic returns on investment and is based on continually updating our knowledge base to better understand and tailor our messaging to our target audiences.

Strategic Approach

Our key goal is to position Bath, Keynsham and the Somer Valley as the market

leader within a very crowded and competitive market place. It utilises the distinctive character and personality of the city of Bath, the one location in the West of England of global renown, to attract more investment and more businesses.

We are already working hard to re-position the perception of the city as a place of astounding heritage and cultural significance to a place where those characteristics are key attractors for international firms. There are six key 'strategic' strands to all activity undertaken:

1. International Partnerships

In the last 6 months Bath has hosted 4 delegations from Chinese provinces all seeking to form strategic alliances with Bath for the purpose of enabling commercial investment propositions for businesses. We have pre-existing interest from American and European firms attracted to Bath's excellent proximity to Heathrow and London. As our proposition for the EZ develops we work with these locations to maximise the most appropriate investment from these locations.

2. National and Regional Partnerships

As well as working on joint initiatives with international partners we will also continue to invest in the development and work closely with Invest Bristol and Bath to develop our proposition. This will include establishing the pipeline of demand to indicate what the strongest opportunities are for inward investment for the EZ and what type of development should be brought forward. Property and infrastructure investment – working with the Council and the LEP to identify and target international investors to bring forward the strongest possible commercial development as quickly as possible. Occupier investment – attracting new business with a strong fit for the specific attributes of the EZ creating jobs and generating income for the region.

3. Collateral

We will develop a suite of marketing collateral which will be used to underpin all activity undertaken throughout the campaign. This will include printed materials and a dedicated online presence, utilising a visual identity based upon the existing Bath and Somer Valley brand but with a clear investment focus.

4. PR

We will develop a programme of targeted PR activity through hosted events, thought leadership and to launch any products created for the campaign. We have for example developed a programme for the creation of key political and business ambassadors to work with us and endorse Bath and the Somer Valley as a strategically important business location. Activity will be planned around key milestones in the run-up to the delivery of each specific development site or emerging property offer to ensure maximum exposure.

5. Personal dialogue

Linked to the partnerships theme where individuals or groups have been identified within the investment community as key decision makers then dedicated activity can be undertaken to promote Bath, Keynsham and the Somer Valley and open lines of dialogue to identify how the EZ team can work to realise investment ambitions. This will include opening up direct access to both politicians and senior officers.

6. Support Packages

Whilst not specific to the 'marketing' of the sites it is important that the EZ team develops bespoke wraparound service for example recruitment and skills support for

inward investors and housing solutions where necessary to supplement the existing incentive packages.

Tactical Approach

<i>Why Bath, Keynsham and Somer Valley? Taster brochure</i>	Initial collateral produced to generate interest and buzz – supported by online content
<i>Why Bath, Keynsham and Somer Valley? brochure</i>	A promotional brochure to underpin the whole campaign, outlining why Bath, Keynsham and the Somer Valley is the best location for business and investment; can be developed into a suite of collateral.
<i>Investment Prospectus</i>	Development of the online and offline investment prospectus highlighting the investment opportunities available
<i>Invest in Bath, Keynsham & Somer Valley</i>	Extend the existing inward investment offer on investbath.co.uk to promote the area, outline the support available and provide details of the opportunities.
<i>E-bulletins</i>	Targeted email bulletins to all known potential investors and businesses, keeping them aware of any latest developments, promoting any activity/events and maintaining momentum throughout the campaign
<i>Social Media</i>	Develop social media (particularly Twitter) to generate buzz around Bath, Keynsham and the Somer Valley, promote activity/events and keep the campaign immediate, building on current presence via @investinbath
<i>Advertising</i>	Targeted advertising can be undertaken both on and offline, looking particularly at key industry/sector-specific publications and websites; could also be used to open up avenues for editorial content (if budget allows)
<i>Direct marketing</i>	Targeted direct marketing activity could be undertaken to key sectors and audiences (through list rental or purchase) to promote specific events/products that are part of the campaign (if budget allows)
<i>Thought leadership</i>	Commission research to identify trends and perceptions within our target audiences and demonstrate why Bath, Keynsham and the Somer Valley is the best fit.
<i>Media</i>	Targeted activity within the regional, national and international media to raise the profile of Bath, Keynsham and the Somer Valley as a business location, launch any new campaign products, disseminate any thought leadership undertaken and react to any regeneration/investment agenda.
<i>Events</i>	Events will be run targeting different audiences allowing the council to promote the borough, highlight opportunities, engage in discussions/debates on key business issues and provide

	opportunities for our ambassadors to speak on our behalf. Building on developmental work which is being undertaken to promote Bath Quays.
<i>Tailored familiarisation tours</i>	Tours can be undertaken for individuals/small groups to allow us to show the opportunities available in the borough and open personal dialogue between senior business figures/decision makers and key politicians/officers in the borough over how we can support their investment plans.
<i>Reciprocal Promotion</i>	Forge strong communications links with our partners to ensure we have a significant presence within their own marketing collateral (e.g. websites/e-newsletters/social media).
<i>Partner events/activity</i>	Identify opportunities to ensure EZ involvement in any events/activity being undertaken by our partners.

Site Specific Approach & Prioritisation

It is envisaged that sites will be marketed separately due to offering differing propositions to the developer and occupier markets. The Council will work closely with both Invest in Bristol and Bath and its appointed agents to track details of occupier requirements.

Marketing of the individual sites within the Bath elements of the EZ will be prioritised in accordance with the **realistic phased delivery schedule as listed in the table in E2. Each project site currently has a dedicated Communication plan which follows the outlined strategic and tactical delivery model.**

For example, this is the approach taken with Bath City Riverside and Somer Valley Cluster which will be replicated as appropriate for the new sites:

Bath City Riverside – the Council will develop a clear brand for the overall Bath Riverside scheme with a focus on attracting key sectors outlined within the Economic Strategy. This proposition will be the basis of a marketing exercise to secure a development partner in 2016. Whilst the structure has yet to be determined, the Council will work in partnership with the selected partner to bring forward the servicing and then development of the site. The development partner will bring expertise and resource which will include marketing the scheme to end occupiers.

Marketing of the individual sites or specific properties will be marketed in alignment with the usage assigned to each building. E.g. the marketing of small business incubator space will be targeted at spin offs from the Bath University Innovation Centre and Guild Co-Working Hub whilst larger office floorplates will target national and international organisations

A362 Growth Corridor – Following site assembly the Council will market the opportunity to secure a development partner either directly or in partnership with the landowner(s). It is envisaged this partner would provide pre-development and development management services as well as delivering key site servicing works. A draw down structure would most likely be established whereby serviced plots can be either sold to owner occupiers or drawn down by the developer once market interest is established.

The completion of site servicing works will reduce cost and improve viability and speed of delivery. Again marketing of the individual plots or specific properties will be marketed in alignment with the usage assigned to each building. E.g. the marketing

of small grow on space may focus on creative designer makers from Bath Spa University in need of small production facilities more suited to a rural environment or spin-offs from West of England tech locations.

A4 Growth Corridor – The Council will follow the approach outlined for the A362 growth Corridor to ensure consistency of approach. Whilst the A362 Corridor is expected to favour marketing targeted at growing domestic firms, the A4 Corridor's proximity to Bath and Bristol will make it possible to target international investors. The recent interest in an 'offshore' incubation space from the Zhuhai provincial government (replicating their Singapore site) is an already positive step in regard to soft market testing.

SCHEDULE 4 – SITES AND INCENTIVES

Proposed EZ Sites	District / Local authority Ward	ECA	BRD	BRR
BATH RIVERSIDE				
CATTLEMARKET	ABBEY		X	
MANVERS STREET	ABBEY		X	
NORTH QUAYS	ABBEY		X	
SOUTH QUAYS	WIDCOMBE		X	
SOUTH BANK	WIDCOMBE		X	
GREEN PARK EAST	KINGSMEAD		X	
GREEN PARK WEST	WIDCOMBE		X	
BATH PRESS	WESTMORELAND		X	
ROSEBERRY PLACE	WESTMORELAND		X	
KINGSMEAD HOUSE	KINGMEAD		X	
KEYNSHAM				
SOMERDALE	KEYNSHAM NORTH		X	
BROADMEAD PENINSULA	KEYNSHAM EAST		X	
EAST OF KEYNSHAM	KEYNSHAM EAST		X	
SOMER VALLEY				
OLD MILLS	PAULTON		X	
WELTON BIBBY BARON	MIDSOMER NORTON NORTH		X	
WESTFIELD	WESTFIELD		X	
BATH BUSINESS PARK	PEASEDOWN & BATHAVON SOUTH		X	
WELTON HOLLOW	MIDSOMER NORTON NORTH		X	
MIDSOMER ENTERPRISE PARK	MIDSOMER NORTON NORTH		X	

SCHEDULE 5 – MANAGEMENT INFORMATION

Q1* What was the value of the retained rates that were reinvested in the Enterprise Zone in the last financial year?

Q2* What was the value of the retained rates that were reinvested in the LEP area in which the Enterprise Zone is situated, including the amount in Q1, in the last financial year?

Q3* What was the value of the borrowing against retained rates undertaken by the LEP accountable body or the EZ local authority in the last financial year?

Q4 What was the change in the number of newly created jobs, excluding construction jobs, on the Enterprise Zone in this quarter?

Q5 What was the change in the number of newly created construction jobs on the Enterprise Zone in this quarter?

Q6 What was the change in the number of jobs that were safeguarded on the Enterprise Zone in this quarter?

Q7 Was a Local Development Order introduced on the zone or a part of the zone this quarter?

Q8 What was the change in the number of businesses that started trading on the zone this quarter?

Q9 What was the value of any new public sector capital investment on the zone this quarter? Do not include borrowing against retained rates.

Q10 What was the value of any new public sector revenue investment on the zone this quarter?

Q11 What was the value of any new private sector investment on the zone this quarter (excluding non-monetary investment)?

Q12 What was the value of any new private sector non-monetary investment on the zone this quarter, e.g. use of facilities, staff?

Q13 What area of land was reclaimed and made ready for development on the zone this quarter?

Q14 What commercial floorspace was constructed on the zone in this quarter?

Q15 What commercial floorspace was refurbished on the zone this quarter?

Q16* "What was the market rate for leasing commercial floorspace on the Enterprise Zone as of the current date?"

Q17 What land sales were there on the zone this quarter?