ARUP

HUMBER ECONOMIC STRATEGY.

2025–2035

Arup | August 2025

The Humber Proposition

SHARED ECONOMIC PROSPERITY FOR BUSINESS AND OUR COMMUNITIES

Over the last decade, increasing pan-Humber strategic leadership and partnerships have established a strong proposition in the region. There is a sense of ambition and consensus among leaders across the estuary that the Humber can deliver more for the UK and the time for catalytic investment is now.

The size of the economic opportunity in the Humber is significant at a UK scale – and the range of opportunities that could be delivered in the Humber are at the forefront of the Government's Modern Industrial Strategy and commitments to driving long-term economic growth, job and skills creation, boosting business investment and supporting high-growth sectors. With the potential to attract fledging industries to the Humber, it is in the national interest to ensure the opportunities available to the Humber are delivered. These opportunities are wider than the Humber and can benefit the surrounding areas beyond Hull and East Yorkshire and Greater Lincolnshire.

The Humber is paving the way for the UK's future. Its evolution from a traditional maritime hub and industrial economy to an economy with leading capabilities in advanced manufacturing and energy production symbolises a new era of growth and security. This is positioning the Humber as a region of critical importance in the UK's journey toward a prosperous, competitive and resilient economy.

The region's unique combination of a strategic position as a critical trade gateway through the Humber Freeport, deep-water ports, cutting edge energy, industrial innovation, world leading environmental resilience, rapidly growing research and innovation base and abundance of development land along with its interface with the Southern North Sea means that the Humber is a cornerstone in the UK's plan to increase business investment, jobs and skills and grow the industries of the future. The industrial transformation opportunity in the Humber will provide a huge stimulus to the economy and is critical to skills and job retention, energy security, economic resilience, strengthening productivity and maintaining business competitiveness. This will also drive synthesis between existing industry and assets maximising the Humber's potential to host opportunities outlined in the UK's Modern Industrial Strategy.

The Humber Proposition

THE HUMBER IS A NATIONALLY IMPORTANT STRATEGIC ASSET

There is an increasing recognition of the economic opportunity being incubated in the Humber, demonstrated by the high appetite for both domestic and foreign direct investment in the region's economy. The Humber Freeport provides the tools to incentivise investment and accelerate the region as a world-leading hub and exporter of innovation and commercialised energy and advanced manufacturing technology and products and the Freeport builds on the success of the Enterprise Zones which were key to attracting industry leading and innovative businesses to the Humber.

In addition, catalysed by clear policy levers and the local, regional and national vision for growth in jobs and skills, businesses have earmarked at least £15bn of capital investment to deploy in the region to create new and enhance existing assets. This would deliver opportunities in energy industries to enable strong and secure growth and boost living standards.

Building on this platform, the Humber has an unrivalled opportunity to transform the economy by:

- Attracting investment and securing jobs in traditional forms of industry with a focus on energy production.
- Driving up skills and educational opportunities and helping to lift the region's performance against key socio-demographic indices.
- Working in partnership across the region to retain and enhance the resilience of the natural environment which characterises the Humber Estuary.

The Significance of the Humber Industrial Cluster

THE HUMBER'S PROJECTED ECONOMIC IMPACT EXTENDS BEYOND LOCAL GROWTH, FUELLING SECTORS AND SUPPLY CHAINS ACROSS THE UK AND CONTRIBUTING TO NATIONAL RESILIENCE IN ENERGY SECURITY AND TRADE

With potential to meet 50% of the UK's future energy needs, The Humber Industrial Cluster is critical to powering the nation.

Over 20,000 new jobs to be created from plans for industrial transformation.

The largest offshore wind opportunity in the UK with eight operational offshore wind farms

The Humber houses the largest Enterprise Zone in the UK

£1bn

The Freeport already attracting more than £1bn of investment from global businesses.

The Humber is key to delivering growth ambitions in energy industries.

It is experiencing some of the fastest productivity growth outside of London.

The Humber has a workforce of 68,000 manufacturing employees - an industrial base with transferable skills to support growth.

68,000

The Humber is the busiest UK trade estuary by tonnage.

The Humber boasts leading education and training facilities

£15bn

of private sector investment is ready to be unlocked in the energy transition in the Humber.

New adaptive strategies to manage tidal flood risk and increase resilience for the next 100 years.

Introduction

Background

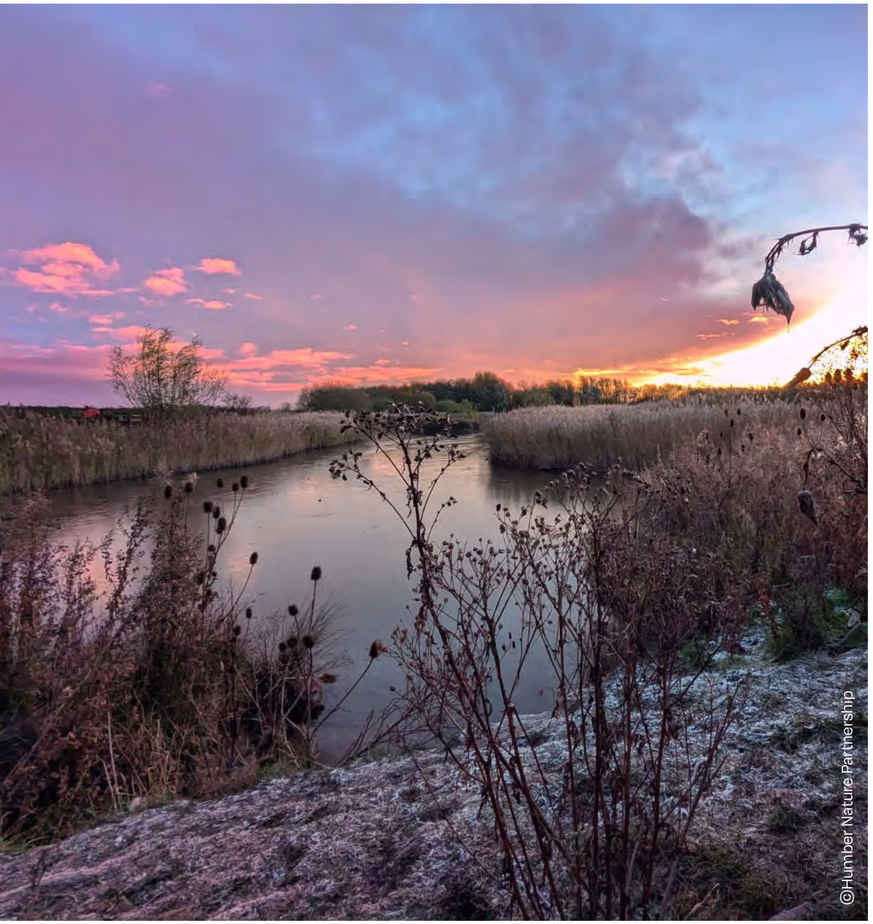
HUMBER ECONOMIC STRATEGY

Through their respective devolution deals and together with government, the Hull and East Yorkshire Combined Authority and Greater Lincolnshire Combined County Authority recognise that optimising the Humber's economic potential will require the public and private sector on both banks of the Humber Estuary continuing to work together on pan-Humber economic opportunities alongside the Humber Energy Board and Humber Freeport; with Government acting as a supportive partner.

This builds on the increase in strategic partnership working in the region between partners over recent years in the form of the Local Authorities working together with the Humber Freeport Board and Humber Energy Board and the previous Humber Industrial Cluster Plan.

Overview and Strategic Role

HUMBER ECONOMIC STRATEGY



This Strategy

The role of this strategy is to articulate the distinctive economic opportunities for the region and the national significance of these.

This Humber Economic Strategy is focused on strategic opportunities where a pan-Humber approach is necessary. The two Combined Authorities and delivery organisations in the region, including the Humber Freeport and Humber Energy Board, have set out other economic opportunities suitable for delivery at a spatial geography.

This strategy identifies:

- Estuary-wide growth opportunities in the Humber of national significance to direct investment in the region over the next 10 years and beyond.
- Mitigation measures to barriers to growth to catalyse and enable significant and positive change in strategic priority areas.
- Game changing and targeted interventions and actions needed across industry and the public sector to deliver pan-Humber strategic aims.

Other Sectoral Priorities

The implementation of two separate devolution deals in the Humber requires a clear strategic framework between priorities at the pan-Humber level and those undertaken at the geographic level by respective Combined Authorities, Local Authorities, the Humber Freeport, Humber Energy Board or delivery organisations.

The two Combined Authorities will have control over areas such as transport, housing, place and adult skills, and will be developing Local Growth Plans and Investment Plans to shape the future of their areas and outline how local levers will drive growth.

Both devolution deals include the need for the two Combined Authorities, Local Authorities, the Humber Freeport and Humber Energy Board to continue to collaborate on pan-Humber economic opportunities. Both the Combined Authorities Local Growth Plans and Investment Strategies, and the Humber Freeport and Humber Energy Board Strategy and Investment Plans, will include the pan-Humber priorities in this document as shared priorities and set out the actions and investments they will undertake to help deliver them.

The Combined Authorities, Local Authorities, Humber Freeport and Humber Energy Board, alongside educational providers and the private sector in the geography will collaborate on the joint design and commissioning of plans and activity where it makes sense to do so.

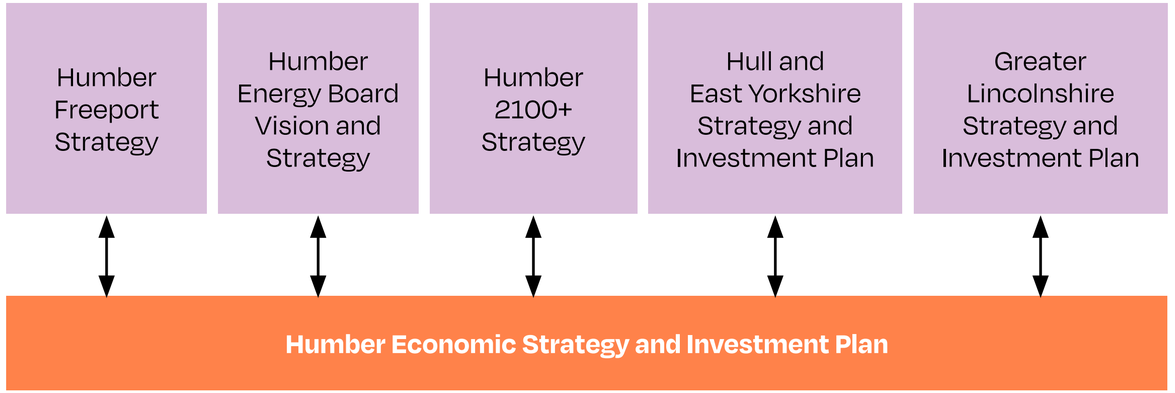
Wider Context

HUMBER ECONOMIC STRATEGY

This Humber Economic Strategy considers the Humber 2100+ Strategy, Humber Freeport Strategy and Humber Energy Board Strategy, in addition to the economic priorities, drivers for growth and emerging Local Growth Plans for the Hull and East Yorkshire and Greater Lincolnshire Combined Authorities and the role of associated partner and delivery organisations. Both Combined Authorities, Humber Energy Board and the Freeport are developing their plans on how they will support the Humber strategy directly or through complementary activity to ensure they are aligned and continue to collaborate, codevelop and work together on joint priorities for the Humber.

The Humber Industrial Cluster Plan set the strategic roadmap for transforming energy-intensive industry in the Humber to support the transition towards a more secure and resilient cluster. This Humber Economic Strategy builds on these foundations and further considers the Humber's importance in delivering the UK's Modern Industrial Strategy and growth priorities in energy, alongside the Humber 2100+ strategic approach to managing the long-term impacts of tidal flooding and sea level rise to ensure the region can stay open to business in a changing natural environment.

Developing Strategic Landscape



The Humber Vision

To bring large scale growth, jobs and prosperity to the Humber region by securing unprecedented private sector capital investment to transform the economy into a world leading competitive and resilient industrial economy and, through the Humber Freeport, a national hub for global trade and investment. All whilst harnessing the potential of the natural environment and landscape and sharing the opportunity and benefits with communities and businesses across the region.

The Humber Opportunity

Drivers for Change

STRATEGIC OPPORTUNITIES

The Humber is a source of enterprise and ambition. The economic viability and resilience of the Humber places the region in a prime position to support government objectives and missions around creating a more competitive, secure and resilient economy to provide the stability needed for long-term investment decisions and attract business investment and jobs in high growth sectors.

Linked to these missions, there are three clear priorities that require a pan-Humber approach to activity in the The Humber Estuary Industrial Growth Corridor. These strategic opportunities for the Humber are:

1. Energy Security and Resilience
2. Freeport, Ports and Logistics
3. Environment and Natural Capital

These growth opportunities in the Humber are of national significance due to the scale of potential job creation and impact. In addition to the scale of potential contribution to government objectives.

Realising the full economic potential of the Humber and unlocking growth by overcoming barriers to investment will require holistic consideration of the place ecosystem and enablers for future investment. This includes enabling innovation to drive growth in priority areas, ensuring the labour force is equipped with skills required by future industries to attract and retain business, investing in infrastructure, and coordinating leadership and inward investment at a Humber wide level.

Places that also proactively build environmental resilience into their growth strategies will be better positioned to thrive in the long term by protecting people and assets and attracting investment. This will boost productivity, enable the Humber to remain competitive, attract investment and maximise future opportunities presented.

Drivers for Change

STRATEGIC OPPORTUNITIES

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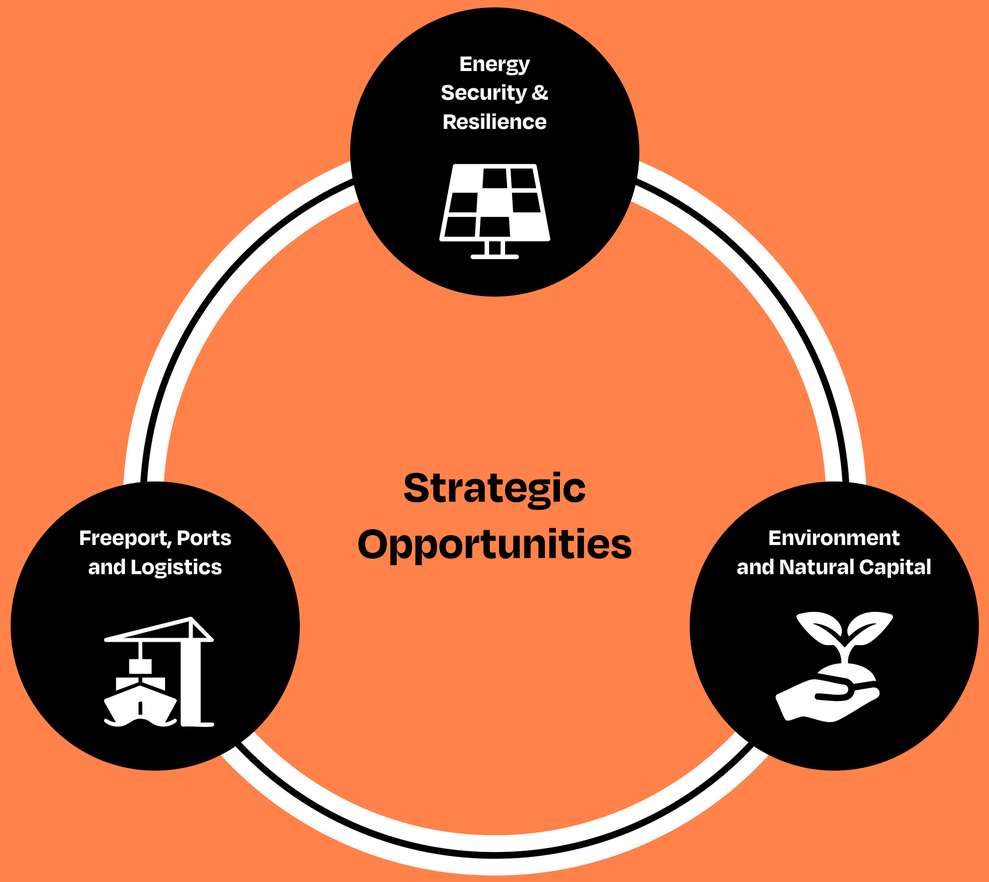


Strategic Opportunity 1. Energy Security and Resilience

THE HUMBER IS THE LARGEST INDUSTRIAL TRANSFORMATION AND ENERGY SECURITY OPPORTUNITY IN THE UK

The Humber is nationally significant and has a key role in the UK's plan to create investment, growth and good jobs in energy industries and is central to the success or failure of the Government's missions around economic and energy security and resilience.

Utilising the natural advantages of the Estuary's geography, and its complementary industrial asset base, the Humber can drive growth, attract unprecedented levels of private sector investment, and improve productivity through generating energy that creates a pathway to long term economic growth and prosperity. This is increasingly important in an ever-changing volatile global context.

As the UK's Energy Estuary, the Humber is revolutionary and pivotal to advancing towards a more resilient future and is pioneering energy technologies such as offshore wind, carbon capture, hydrogen, nuclear and energy storage. There is a world leading opportunity to embrace energy industries and generation of energy as a growth opportunity in the Humber.

This is visibly evident across the array of transformational energy projects in the region, major industrial and power assets in Drax, Scunthorpe, Immingham and Saltend and the size and scale of existing industry.

With the existing foundational sectors and energy infrastructure and capacity to allow the UK to meet demand for energy, the Humber will be critical to the Government's missions to boost economic growth and stability and for the UK to secure a more resilient and competitive energy supply. With the potential to meet 50% of the UK's future energy needs, the region can support the UK to adapt and thrive in a changing world.

£15bn of private sector investment is ready to be unlocked in the energy transition in the Humber. This opportunity in the Humber can also deliver new jobs and supply chain opportunities to support the national economy. One in ten regional jobs will be safeguarded and thousands of new jobs created by transforming industry in the Humber. By embracing opportunities presented by energy industries, the Humber can maximise opportunities to unlock substantial private sector investments in energy and advanced manufacturing, creating new jobs, and economic resilience.

The UK's Energy Estuary

The infrastructure and **existing energy capabilities** to allow the UK to meet future demand for energy.

£15bn of private sector investment is ready to be unlocked in the energy transition in the Humber.

The Humber has the potential to meet **50% of the UK's future energy needs.**

One in ten regional jobs will be safeguarded and thousands of new jobs created by transforming industry in the Humber.

66% of the UK's licensed CO2 storage capacity is accessible from the Humber.

33% of total UK offshore wind capacity operates from the Humber and growing.

Strategic Opportunity 2. Freeport, Ports and Logistics

THE HUMBER IS THE UK'S BUSIEST PORT COMPLEX

The Humber is a critical transport and logistics hub with excellent rail, road, air and sea connections. As the UK's busiest trading estuary, the Humber serves as a hub for international trade and plays a vital role for the UK as a global gateway.

The Humber is resourceful, and its strategic location allows the region to embrace and catalyse on trade and employment opportunities presented by the four major ports of Goole, Hull, Immingham and Grimsby. Connectivity, vast investment and robust supply chains means the Humber has become a central hub for business development and inward investment.

The Humber Freeport enhances the Humber's competitiveness in logistics activity, and supports a greater share of UK trade in the Humber geography, including improving port infrastructure and connectivity.

Freeport status will inject £650 million of further investment into the Humber, providing a catalyst for job growth and innovation. This presents opportunities to support added value activities in the Humber, and to use the ports as an asset not just a throughput of goods.

The UK's Global Gateway

£75 billion passes through the Humber ports each year.

The Humber ports handle **17% of the nation's trade**.

The Humber ports **support over 24,000 jobs** in the region, contributing £2.5billion to the UK economy.

Strong land, air and sea connectivity, with over 60 sailings a week to mainland Europe.

Freeport status will inject £650 million of investment into the Humber.

Cluster projects could unlock up to **£7 billion of investment across the value chain**.

Strategic Opportunity 3. Environment and Natural Capital

THE HUMBER IS A UNIQUE PLACE TO LIVE AND WORK

The environment of the Humber presents economic and innovative opportunities to increase the resilience of the natural and biodiverse environment and enhance quality of place as an asset to regeneration.

The Humber is part of a unique ecology system and forms part of a Special Protection Area, a Special Area of Conservation, Ramsar and Site of Special Scientific Interest. There are opportunities for innovation in process to deliver biodiversity benefits in the Humber.

Main enablers to any ambitions around the Humber will be increasing resilience to and adapting to the environmental change (rising sea level, flood risk, coastal erosion, water availability, increased temperatures, food scarcity). It will be critical to plan proactively to integrate infrastructure, land use and environmental mitigation proposals from the outset to make investment future-proof and maximise growth whilst balancing land availability with requirements for biodiversity and development need.

This will require a shift in processes and governance structures. There will need to be joint working and a clear strategic consideration of environmental mitigation and management at a wider level to ensure future investment enhances flood protection and water availability. This will demonstrate the stability, certainty and resilience in the region needed to enable long-term investment decisions.

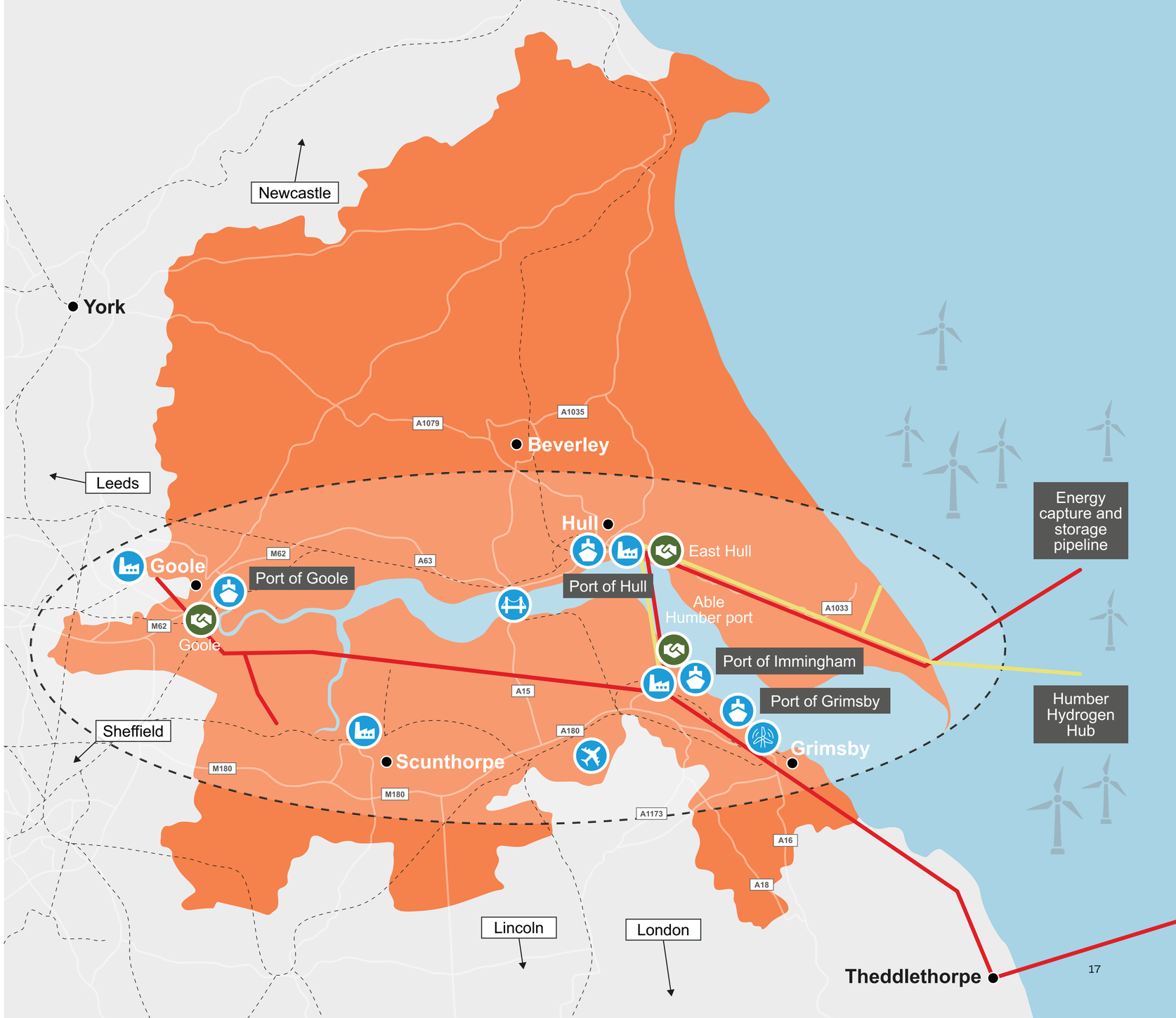
Placing resilience at the heart of economic strategy and investment plans in the Humber will protect the Estuary's precious natural resources, alleviate the risk of flooding to communities and industries around the Estuary and proactively support investor plans from the outset to ensure investment opportunities are maximised alongside environmental mitigation and enhancements.

Investment and growth opportunities in the Humber

The Humber Estuary Industrial Growth Corridor

This map seeks to identify the key spatial opportunities of national significance in the Humber and highlights the region's major industrial and power assets.

In addition, there are cross cutting opportunities without spatial elements that apply across the whole of the Humber. This includes growth in jobs, skills and investment across the supply chain of energy and advanced manufacturing industries. The Humber Estuary Industrial Growth Corridor is the focus area for this Humber Economic Strategy and accompanying Investment Plan.



The Humber 2030 Vision sets out the potential investments required at more detailed spatial level.

Achieving the Vision

FUTURE PRIORITIES FOR THE HUMBER

Achieving the vision for the Humber will require cross-border commitment to both strategic and local priorities.

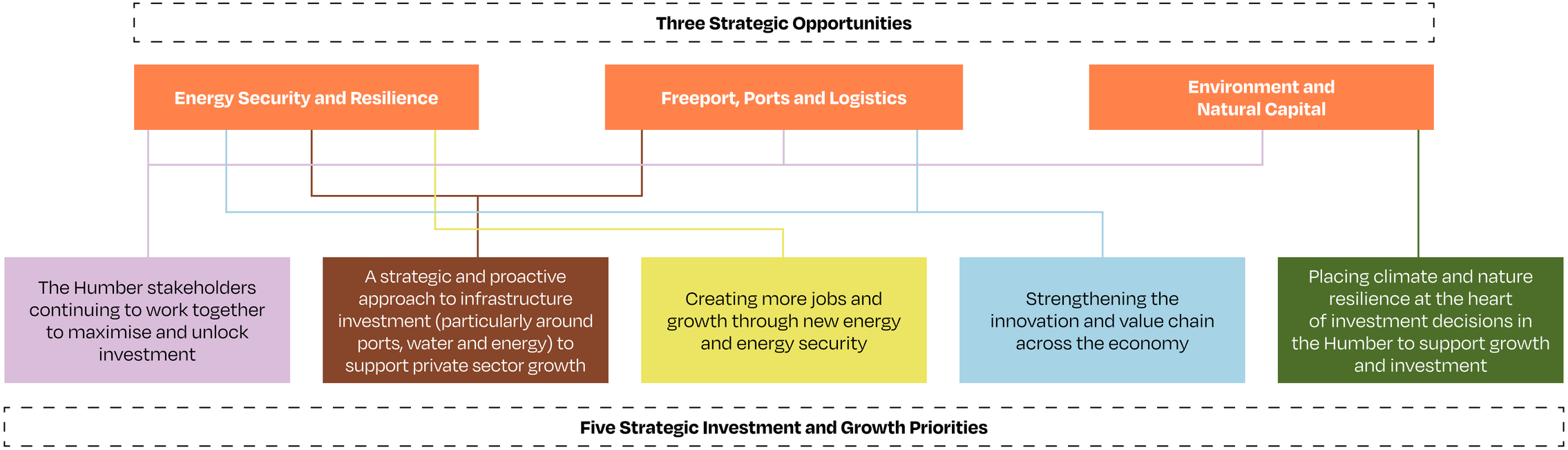
Five Humber-wide investment and growth priorities have been identified and set out the goals and principles for investment for the Humber which will be vital to the region achieving success. These are complemented by the Humber Investment Plan which will set out how and where developments could be implemented in support of these goals.

Both Combined Authorities and the Humber Energy Board and Humber Freeport are developing their plans on how they will support the Humber strategy directly or through complementary activity. Local priorities for investment will be delivered locally by the relevant authority and partner organisations.

Achieving the Vision

FUTURE PRIORITIES FOR THE HUMBER

The five investment and growth priorities for the Humber are intended to enable and guide the allocation of resources and investment towards achieving the long-term vision across the strategic opportunities for the Humber. This includes enhanced ways of continued joint working among the Humber stakeholders.



5 Investment and Growth Priorities

TO UNLOCK GROWTH AND INVESTMENT...

1. The Humber stakeholders continuing to work together to maximise and unlock investment.
2. A strategic and proactive approach to infrastructure investment (particularly around ports, water and energy) to support private sector growth.
3. Creating more jobs and growth through new energy and energy security.
4. Strengthening the innovation and value chain across the economy.
5. Placing climate and nature resilience at the heart of investment decisions in the Humber to support growth and investment.

Investment and Growth Priority 1

The Humber stakeholders continuing to work together to maximise and unlock investment.

Where are we now?

1. The two Combined Authorities will establish **structures and partnerships to deliver plans** and spatial priorities for growth.

2. **Co-operation across the region is increasing** with partnerships created to deliver sectoral opportunities. The region is generating new ideas and proactive approaches towards coordinating inward investment.

3. The Humber Energy Board and Humber Freeport are **bringing together the public and private sector** in the region to maximise and drive forward investment.

4. There is agreement **stronger Humber-level governance** is needed to drive the implementation of this Humber Economic Strategy and Investment Plan.

Investment and Growth Priority 1

THE HUMBER STAKEHOLDERS CONTINUING TO WORK TOGETHER TO MAXIMISE AND UNLOCK INVESTMENT

Where would we like to be?

The two elected Mayoral Combined Authorities in the Humber have a remit to deliver on the devolution deals in the region. These deals recognise that there needs to be a strengthening of pan-Humber leadership. There has been an increase in pan-Humber strategic economic partnership working over the last decade which can be built on to strengthen the region's voice further. This includes through the pan-Humber design of the Humber Freeport and the Humber Energy Board.

Mobilising and building on positive economic leadership in place, a resourced and dedicated Humber-wide coordination function that acts as a clear spokesperson for the Humber with collective oversight of strategic social, economic and environmental considerations will be key to maximising future opportunities. The Humber stakeholders are working together on this to ensure the preferred outcome complements and builds on existing structures to bridge and bring partners together.

This will enable the Humber to articulate a clear, consistent, outward-facing and investable proposition around what the region can offer UK PLC, and for businesses to focus investment.

What needs to happen to get there?

1. **Humber level leadership and collaboration** - there needs to be a strengthening of pan-Humber working to drive strategic economic priorities.
2. **A concerted and coordinated approach to attracting inward investment** - the Humber needs dedicated, government-backed support to coordinate, promote, and manage inward investment opportunities with the two Combined Authorities, Local Authorities, Humber Freeport / Industrial Strategy Zone, Humber Energy Board, and public and private sectors working together.
3. **Clarity of messaging to government** - all stakeholders across the Humber need to continue to articulate a clear and consistent proposition of what the Humber offers and what is needed.
4. **Security of support from Government** - a statement of intent for the region is needed so the Humber stakeholders can plan with confidence.

Investment and Growth Priority 2

A strategic and proactive approach to infrastructure investment (particularly around ports, water and energy) to support private sector growth.

Where are we now?

1. The Humber is home to major **industrial assets of national significance.**
2. The Humber has excellent **rail, road and inland links** and proximity to several regional airports. Enhanced rail freight is crucial to facilitating further growth and each Combined Authority will set out the investment required in their Local Transport Plan.
3. **Improvements to grid capacity** are in the pipeline to ensure the Humber can meet the planned industry growth in particular energy generation.
4. Security of **future water availability and quality** is needed to ensure investors can plan with confidence.
5. The established **Humber Freeport** is a **catalyst** for inward investment and provides development ready sites and infrastructure.
6. The Humber is centred around the **UK's busiest port complex**. The four major ports of Hull, Goole, Immingham and Grimsby play a vital strategic role for the UK as a global trade gateway.

Investment and Growth Priority 2

A STRATEGIC AND PROACTIVE APPROACH TO INFRASTRUCTURE INVESTMENT (PARTICULARLY AROUND PORTS, WATER AND ENERGY) TO SUPPORT PRIVATE SECTOR GROWTH

Where would we like to be?

As the UK's busiest trading estuary and home to major power assets, the Humber is a critical logistics and energy hub. The region has strong road and port connectivity however to enhance the region's competitiveness further and really drive inward investment, there is a need for investment which enhances rail and road connectivity east-west and crucially, to the Humber ports and Freeport and that unlocks key development sites in economically important locations in major town and city centres. There is also a need to improve strategic connectivity to other major city regions across the North of England and the Midlands. The two Combined Authorities will play a role in influencing this investment to improve access to economic opportunities and will set out the transport infrastructure investment required in their respective Local Transport Plans.

For the Humber to meet the level of anticipated growth, a more coordinated and longer-term approach to infrastructure investment (ports, transport and utilities including water and energy) between the Humber stakeholders is required. The ambition is for there to be a common understanding of the infrastructure enhancements required to facilitate cross-border impact and deliver on regional ambitions, and for this to underpin coordination of inward investment between the Humber stakeholders. This will ensure the Humber has the foundations to facilitate planned growth and create places where people want to live, work and invest in.

What needs to happen to get there?

1. **A Humber wide infrastructure strategy** - a single plan which considers a pipeline of infrastructure plans that investors, delivery partners and government can partner in based on strategic understanding of what infrastructure is required to deliver growth.
2. **A Humber Investor Charter** - which is central to investment coordination between Humber stakeholders and sets out the expectations and requirements for development to potential investors, linked to statutory guidance and good practice.
3. **Influence the regulatory framework and a coordinated response to advancing transport and utilities capacity and connectivity –** to unlock investment needed to enable growth and ensure the region can meet anticipated growth demand.
4. **Government investment aligned to support the Humber Industrial Strategy Zone** – including capital funding and a programme of investment to unlock strategic sites such as the Freeport as a catalyst for future investment in growth-driving sectors and public and private sector collaboration.

©Humber Nature Partnership

Investment and Growth Priority 3

Creating more jobs and growth through new energy and energy security.

Where are we now?

1. Due to the size and scale of existing industry, the Humber is the **largest energy security opportunity in the UK** and central to the success of the Government's missions around energy industries.

2. The Humber has the foundational infrastructure, industrial base, wealth of skills and expertise and **existing energy capabilities** to allow the UK to meet future demand for energy and energy security. **Both banks of the Humber are partners in the relevant hubs**.

3. Potential for the **industrial cluster** to attract fledging industries.

4. There is already work ongoing to develop an aligned **skills curriculum in the Humber** and deliver the workforce capabilities and skilled population required by future industry, evident in the DfE backed Careers Hub, Humber Energy Skills Campus and the expansion of the CATCH facility.

5. **Established private sector involvement and engagement** in the mission to transform industry in the Humber through the Humber Energy Board.

Investment and Growth Priority 3

CREATING MORE JOBS AND GROWTH THROUGH NEW ENERGY AND ENERGY SECURITY

Where would we like to be?

The scale of potential jobs, skills and investment growth in energy industries in Humber is a once in a generation opportunity. The Humber Industrial Cluster Plan has outlined that over 22,800 direct jobs could be created in the region from plans for industrial transformational.

The Government's Modern Industrial Strategy recognises the importance of energy industries across the UK such as in the Humber are critical for future competitiveness, resilience and energy security. The Government has announced its support for the Viking Carbon Capture Usage and Storage project in the Humber by providing development funding to advance infrastructure delivery. Further investment in infrastructure to support offshore wind generation and deployment including blade and cable manufacturing, hydrogen production and distribution, nuclear fission and fusion energy and greenhouse gas removals will create significant growth and job opportunities in the Humber.

There is the potential for the Humber to attract fledging industries and transform the region into a leading energy cluster at a globally significant scale.

The Humber can support the UK to adapt and thrive in a changing world due to the size and scale of existing industry and skills asset base and has a role in allowing the UK to meet future demand for new energy and energy security. If the Humber is going to support nationally significant infrastructure projects, contribute to energy ambitions and be at the forefront of energy industries in the UK, there needs to be a different approach to infrastructure delivery and creating the workforce required to support this investment.

What needs to happen to get there?

1. **Education providers and the private sector need to continue to work together on workforce** – given the scale of economic change, the Humber needs to be equipped with the capabilities demanded to attract and retain investment and deliver the vision.
2. **Stakeholders in the Humber need to continue to align their investment plans –** this includes building on partnership work to date to develop skills and infrastructure strategies to match future industry needs around energy to ensure investors can access the skills they require.
3. **Advance new energy technologies to market and support continued industrial activity** – build the use case and deployment plan for investment in new energy to drive employment growth across the Humber and maintain a competitive advantage in high growth energy industries.
4. **Develop enabling pipeline networks and fit for purpose power distribution to cement building blocks for the future** – major energy storage and distribution infrastructure is needed to support and unlock growth in energy generation and facilitate greenhouse gas removal, transport and storage.

Investment and Growth Priority 4

Strengthening the innovation and value chain across the economy.

Where are we now?

1. The Humber is **experiencing some of the fastest productivity growth** outside of London and has the potential to drive further productivity growth in the north of England.
2. Visible examples of innovation in the region, underpinned by **partnership working between academia and the private sector**. The Freeport and Energy Board are key catalysts in this space.
3. The Humber is a **global gateway**. Opportunities to support added value activities in the Humber need to be developed, to use the port as an asset not just a throughout of goods.
4. The combined manufacturing base and strong educational institutions of the Greater Lincolnshire and Hull and East Yorkshire geographies are perfectly **placed to shape transformation of a new energy and manufacturing cluster**.

Investment and Growth Priority 4

STRENGTHENING THE INNOVATION AND VALUE CHAIN ACROSS THE ECONOMY

Where would we like to be?

The Humber is resourceful, and its strategic location allows the region to embrace and catalyse on trade opportunities presented by being a global port gateway with access to international markets and supply chains. The ports cluster is nationally significant and presents an opportunity to learn from international best practice to create a high-tech hub in the Humber. There are opportunities to embrace new technology, automation and artificial intelligence to generate productivity and efficiency gains that not only safeguard jobs but also serve as a catalyst for new jobs, skills and investment.

The Humber Freeport is already driving growth and investment in this space and stimulates innovation related to energy and advanced manufacturing, a strategic opportunity that is cross-cutting across the Humber. This includes opportunities for innovation in Medi-tech, Agri-tech, rail and artificial intelligence at a local level. Local leaders will play a role in co-creating research and development programmes and partnerships and targeting innovation investment to support local economies.

However, for the Humber to maximise this, there is a need to strengthen the ecosystem for innovation-led growth and move the Humber up the value chain, and to grow supply chain capacity to match desired scale. This includes scaling up innovation and automation and embracing growth in digital technology such as artificial intelligence.

This will drive greater productivity up the industrial base and enable the Humber to be a testbed for new industries and hub for innovation in energy security and advanced manufacturing.

What needs to happen to get there?

1. **Increasing collaboration and research and development** - education providers, universities, businesses, investors, the Freeport, Energy Board and government at all levels should work together to strengthen the ecosystem for innovation-led growth aligned to the growth ambitions of respective Universities.
2. **Facilitating an environment that encourages entrepreneurship** – to accelerate innovation by offering incentives that attract and fosters a vibrant business ecosystem and enhances research capacity.
3. **Endorsement and support from Government for growth in innovation within high growth priority sectors** across the Humber (energy and advanced manufacturing).

Investment and Growth Priority 5

Placing climate and nature resilience at the heart of investment decisions in the Humber to support growth and investment.

Where are we now?

1. The South Humber Gateway Mitigation Scheme is pioneering a **strategic approach to Biodiversity Net Gain**. There are also strategic mitigation sites available for developers to contribute towards across the Humber.

2. The Humber is part of a **unique ecological system** and is designated as a Special Area of Conservation (SAC), a Special Protection Area (SPA), a Wetland of International Importance (under the Ramsar Convention), and includes four Sites of Special Scientific Interest (SSSI).

3. The amazing array of nature and wildlife is part of the USP – **a remarkable place to live**.

4. Flood risk – partnership working on **Humber 2100+ strategy**, which will set out a strategic approach for adapting to sea level rise.

Investment and Growth Priority 5

PLACING CLIMATE AND NATURE RESILIENCE AT THE HEART OF INVESTMENT DECISIONS IN THE HUMBER TO SUPPORT GROWTH AND INVESTMENT

Where would we like to be?

The environment of the Humber presents economic opportunities to restore and transform the natural and biodiverse environment and enhance quality of place and living standards in the Humber. The unique environment continues to be protected by National and European designations and the case for the East Atlantic Flyway UNESCO world heritage site has been developed and moved forward.

Investors need to proactively enhance the natural environment and understand mitigation requirements and view these as investment opportunities rather than constraints. This will give confidence and stability and enable the environment of the Humber to be considered as an opportunity not a barrier and to protect the unique environment for future generations.

To enable successful delivery of priorities, partners are implementing a clear response to growing environmental risks, especially rising sea levels. This includes action by investors, and complementary strategic action that needs estuary collaboration. This is building on the work of existing partnerships that operate around the Humber.

This would enable an approach to environmental adaptation, mitigation and enhancement to be considered in advance of any development and ideally at a more strategic level, using existing mechanisms rather than adding further complexity to this sector.

What needs to happen to get there?

1. **Commitments to place shaping and balancing economic development with the need for biodiversity** - to enhance quality of place to create the Humber as a destination.
2. **Nurture existing partnerships** - supporting the established partnership working of Humber 2100+, living with water and other strategic groups enabling adaptation to develop a joint response to climate resilience.
3. **Sharing good practice on Biodiversity Net Gain** - joint working on Nature Recovery Strategies and work by Natural England to develop a strategic mitigation strategy for functionally linked land through the Protected Sites Strategy pilot and for other impacts e.g. recreational disturbance, to understand best approaches for Biodiversity Net Gain across the Humber.
4. **Strategic approach to mitigation sites** - build on the South Humber Gateway mitigation strategy and enhance this on a larger scale, working across the whole estuary to secure mitigation areas.
5. **Climate resilient investment decisions** - identifying and responding to environmental risks affecting delivery of strategic priorities to increase resilience and the attractiveness of the Humber for investment.

Conclusion

Recommendations

HUMBER ECONOMIC STRATEGY

The time for the Humber is now – with huge potential for targeted public and private sector investment to unlock substantial private sector-led growth.

A resourced, collective and collaborative leadership function for the Humber with oversight of strategic social, economic and environmental considerations will be a key driver in capitalising on future opportunities. It will be critical to plan proactively to integrate infrastructure, land use and environmental resilience proposals from the outset to make investment possible and maximise growth. This would provide the necessary stability and certainty for investors.

A series of clear commitments and catalytic investments is needed to realise the opportunities. There is already strong momentum built on historical partnership working and investment and a healthy future pipeline of private sector investment in the Humber which can be unlocked with:

- Increased strategic Humber level leadership.
- Coordination of investment and infrastructure planning between Humber stakeholders.
- A commitment to investment and creating jobs in high growth industries.
- Certainty on an integrated programme of long-term investment from across governmental departments.
- Strategic consideration of environmental mitigation and management.

Measured by scale and impact, game changing investments and policy are required to deliver cross border benefits in the Humber. It will be crucial to implement bold, step change and set the building blocks needed to deliver growth. The Humber Investment Plan will set out the game changing strategic interventions required to realise the Humber vision.

Next Steps and Delivery

PRINCIPLES FOR INVESTMENT AND IMPLEMENTATION

This Humber Economic Strategy sets out the Humber proposition for investment and an indicative longer-term route map to deliver the economic opportunity in the Humber. The investment and growth priorities set out the principles for investment and set the strategic direction and scope for future investment in the Humber to unlock growth. These will be agreed with the two Mayors in the region to ensure they align, collaborate and codevelop joint priorities.

An accompanying Humber Investment Plan will set out the investment prospectus and live pipeline of game changing strategic interventions for the Humber and the specific action required from local, regional and national stakeholders, delivery organisations, government and agencies working in partnership to realise strategic growth opportunities and the vision for the Humber over the next 10 years and beyond. This includes the policy, funding and arrangements in place to deliver each proposition.

Developing strategic investment propositions for inclusion in the Humber Investment Plan will require continued cross-sector and cross-partner codevelopment between the Humber stakeholders. Humber wide capability is required to develop strategic investment propositions to market and a working group is being set up to deliver this.

This Humber Economic Strategy sets the strategic direction for growth in the geography however how the Humber stakeholders are going to deliver on this is crucial to maximising opportunities. Central to realising the Humber opportunity is ensuring clarity of purpose between the multiple organisations and leaders in the Humber exists alongside confirmation of the delivery mechanism to achieve this. There is agreement among leaders in the Humber that Humber-level executive arrangements would drive the implementation of this Humber Economic Strategy and Investment Plan.

Emerging Humber Delivery Arrangements

A strategic Humber level coordination mechanism is needed to own and drive the implementation of this strategy, in particular to deliver on priority 1.

There is a need to create an entity who owns the delivery of investment and growth priorities for the Humber and can manage the common priorities and barriers to growth in a way that benefits the whole of the geography. The Combined Authorities Local Growth Plans and Investment Plans will include the pan-Humber priorities as shared priorities and set out the actions and investments they will undertake to help deliver them. The Humber partners will come together with the Mayors to deliver this.

There is a need for delivery arrangements to be put in place to ensure this Humber Economic Strategy is implemented, managed and appropriately resourced.

The form and function of the arrangement is also to be agreed, and further work is required to define and implement the preferred outcome. The Humber partners are working together on this and once these arrangements are agreed and finalised, the role of stakeholders, policy changes and actions required to deliver the Humber investment and growth priorities will be defined.

HUMBER ECONOMIC STRATEGY

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