



Brighton & Hove

Seafront Investment Plan 2016 - 2021



01. Executive summary

09. Introduction

14. Objectives of the plan

16. Where are we now?

23. Future seafront priorities

31. Future funding and investment

Summary

Seafront overview

Brighton & Hove's seafront is the face of the city and central to its economy.

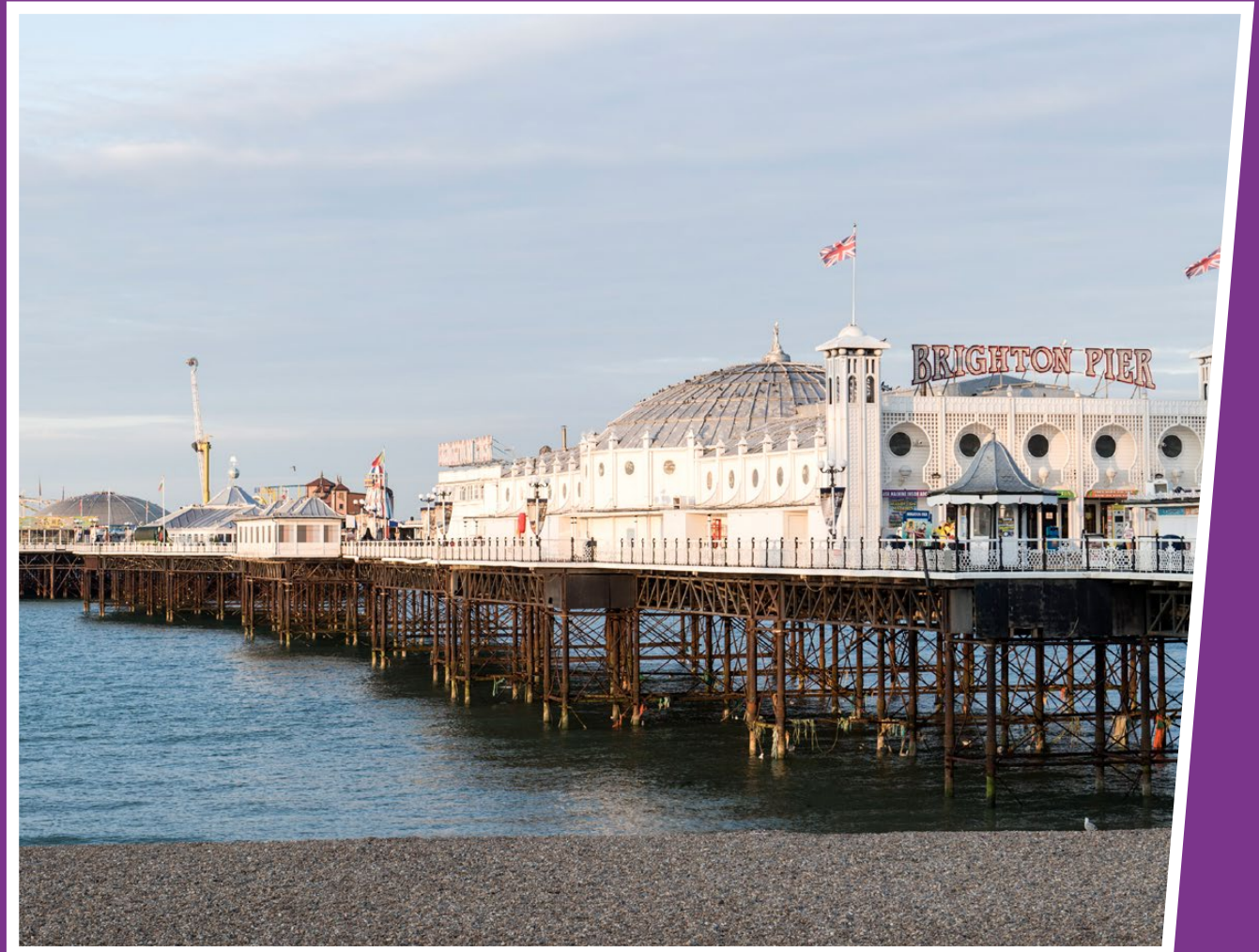
The seafront is a key component of the city's tourism offer. Providing 13km of entertainment and activities either side of the important A259 corridor, the seafront is the city's largest entertainment venue offering **hundreds of retail and leisure opportunities** such as the Brighton Centre conference and entertainment facility, the Brighton Palace Pier and numerous family attractions/activities.

Brighton & Hove's unique character combines **heritage Victorian infrastructure** (over 476 Grade I and II Listed buildings¹) and a **varied and vibrant range of businesses** (over 100 housed within the seafront arches alone).²

The city plays host to over **300 outdoor events each year** with many of them hosted on the seafront's Madeira Drive, such as the Brighton Marathon, classic car runs and London to Brighton bike rides.³

The Brighton Palace Pier alone, one of the primary attractions along the seafront, receives over **six million visitors a year**.⁴ There is a full range of accommodation offered along the seafront, from luxury 5 star hotels through to family run B&Bs, hostels and self-catering or boutique **accommodation for every visitor's budget**.

The seafront plays a key role as a flagship destination for the city, attracting visitors and investment alike.



Where are we now?

Opportunities

Investment and development exceeding £1 billion⁵ is planned along the seafront over the coming years:

The Council has appointed a delivery partner to take forward the redevelopment of the **King Alfred Leisure Centre** in Hove.

The completion of the **British Airways i360** in 2016 will be followed by high quality renovation of the surrounding retail units and public realm in spring 2017.

The proposal for the development of an open water **swimming facility** on Madeira Drive has been approved subject to planning.

First stage funding has been awarded from the Heritage Lottery Fund and Coastal Communities Fund to redevelop the **Saltdean Lido**, with further funding applied for.



Opportunities

There are plans being developed to secure investment and funding to redevelop the heritage assets at **Madeira Terraces**.

Brighton Marina is in its second phase of considerable development and expansion which will provide flats, retail, commercial units and community spaces.

Shoreham Harbour Regeneration is preparing a key planning document in the Local Development Framework for the harbour and surrounding areas, due to be published in 2016 and adopted in 2017.

Construction has commenced on rebuilding transport infrastructure and renovating the former West Street **Shelter Hall** and promenade facilities at the bottom of West Street in Brighton.

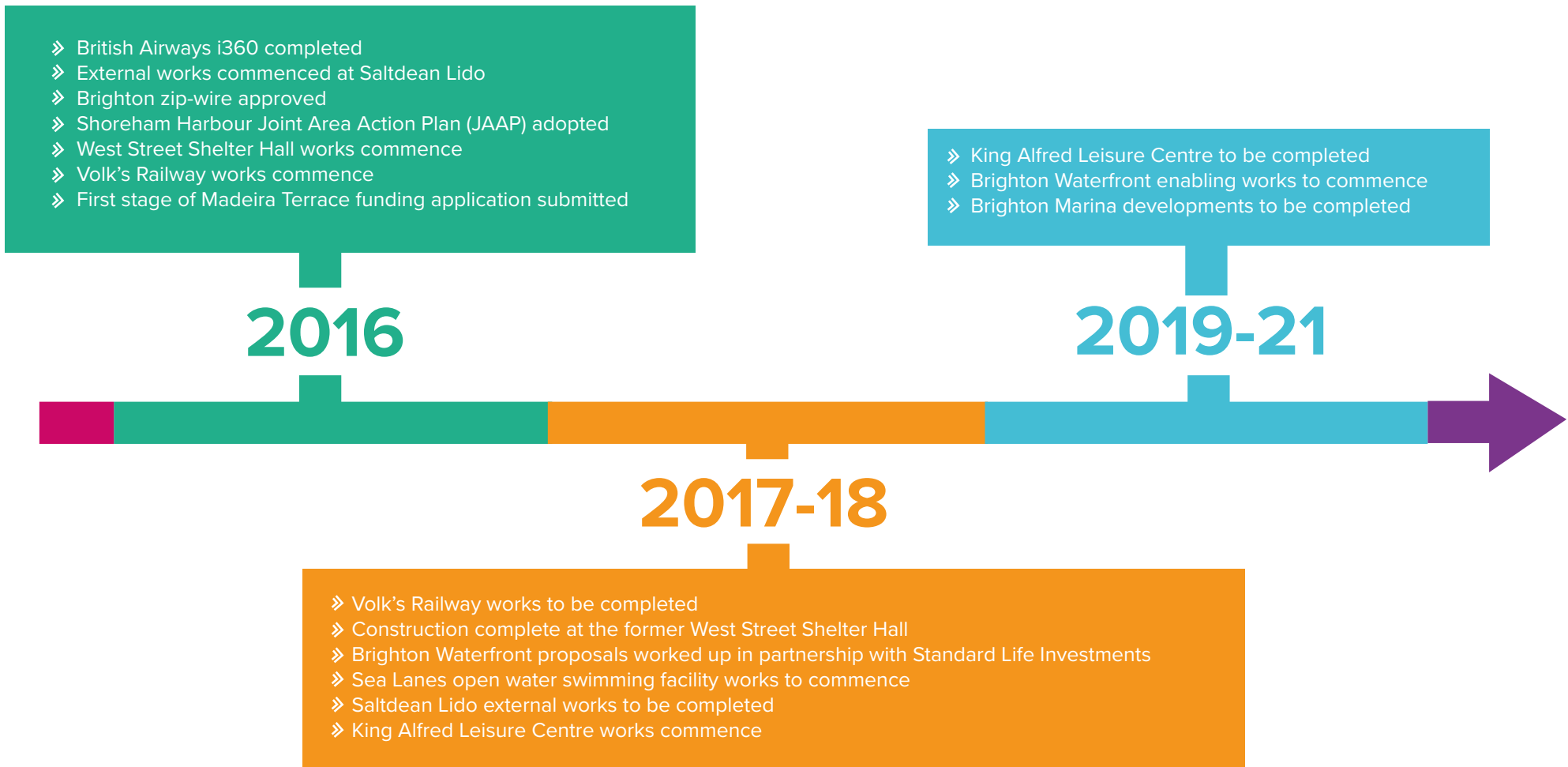
Heritage Lottery Funding has been awarded to redevelop the iconic **Volk's Railway**, which runs east of the Brighton Palace Pier.

The Council is set to back a **zip-wire**, to operate year-round, to replace the Brighton Wheel near the Palace Pier.*

Funding plans are under discussion to bring forward the **Brighton Waterfront** project which will enhance the retail and conferencing facilities of the seafront as well as developing the currently vacant Black Rock site adjacent to Brighton Marina.

Forecasted milestones

The Council is keen to maintain this momentum of activity and encourage additional investment in what is regularly recognised as one of the most innovative cities in the UK,⁶ if not Europe, to channel development. Some of these forecasted milestones are set out in the following diagram based on information at time of writing.





Challenges

Whilst the seafront is a key asset and much development has already been secured over the next five to ten years, a series of challenges present themselves in the short, medium and long term. These are already compromising full use of the seafront and, without action, could act as a barrier to future economic growth.

One of the city's defining characteristics, the **heritage** infrastructure along the seafront, currently presents the council with a notable risk and liability.⁷ In particular the deterioration of the Victorian colonnade along the Madeira Terraces to the east of Brighton Palace Pier and the arches to the west which support the A259 pose problems for the Council going forward.⁸

Transport and accessibility to and from the seafront, as well as east to west along the full length of the city's coastline, is also constrained:

- » Public transport access along the seafront is cited by stakeholders as inadequate.
- » Some of the infrastructure supporting the A259, the key transport link along the seafront, is weakened and needs strengthening.
- » The A259 itself currently presents a physical barrier to pedestrians trying to access the promenade from the city.
- » The linkages between the considerable variety of visitor attractions and the information available to visitors could be improved to provide a more integrated seafront and city tourism offer.

Being a coastal urban area, Brighton and Hove is at risk from three types of **flooding: surface water, ground water and the sea**. Recommendations within the Brighton & Hove Seafront Shoreline Management Plan⁹ are central to unlocking and securing development west of the Marina from 2021 onwards. Without commitment to these objectives, the risks to the seafront increase and in turn could deter future development.

Much of the coastal city's **visitor offer has been seasonal** in the past, reducing the strength of this sector's contribution to the economy.¹⁰ Going forward, **development needs to ensure year-round utilisation of the seafront's offer**.

There are gaps in the funding needed to address the challenges listed here as the cost of infrastructure outstrips the funds currently available. The funding required for the Madeira Terraces structural works for example, is estimated to be in the region of £30 million¹¹; such a gap cannot be resolved by using public funds alone. If the seafront is to overcome the challenges it faces, more innovative funding mechanisms will need to be utilised, together with reviewing the income revenues in place from current assets along the seafront.

This plan sets out to:

Undertake a review of Brighton & Hove's existing seafront infrastructure and planned seafront investment.

Identify a shared set of priorities for further investment to develop and enhance the city's seafront offering.

Propose new models of investment to secure the regeneration of the city's seafront.



Where do we want to be?

To overcome these challenges whilst maintaining and enhancing Brighton & Hove's dynamic economic strength, seafront investment needs to be optimised. Of the existing pipeline projects, the **King Alfred Leisure Centre** and **Brighton & Hove Waterfront** projects have yet to have funding proposals confirmed. In addition to this, the activities of this investment strategy revealed several gaps in infrastructure investment on the seafront:



Madeira Terraces:

The Victorian terraces, are a Grade II Listed structure running along the seafront east of Brighton Palace Pier on Madeira Drive. They are the key focus of the Council-led Madeira Drive Regeneration Strategy, which plans to see a mix of commercial and retail/leisure uses incorporated into these structures to extend the footfall of the seafront and reduce seasonality.



The seafront arches and linkages to the A259:

The Victorian arches provide retail space and also support the A259 highways transport link. The arches are weakened and require strengthening. They remain a key strategic risk for the city and therefore plans to strengthen and replace, where necessary, are ongoing.



Transport and accessibility:

Accessibility is key to the seafront's success. Currently it is a challenge to access the full offer on foot. The need to implement separate, but integrated, transport options and solutions along the seafront was a recurring theme in engagement with key stakeholders involved in the development of this plan. The success of key proposals, such as the Brighton Waterfront project is ultimately dependent on access. These accessibility priorities have been divided into: the A259, public realm, parking and traffic management, a Coastal Transport System and highways structures.

Following a prioritisation exercise, each of these projects is identified as either a short, medium or medium-long term activity for the Council:

Short term



King Alfred Leisure Centre

Medium term



Brighton Waterfront



Madeira Terraces



The Arches / A259

Medium - long term



Coastal Transport System



Public Realm

How do we get there?

As part of the development of this plan, potential funding options have been reviewed for those development priorities which at present do not have a finalised funding package or business case as summarised below.

Activity	Funding options	Pros	Cons
Madeira Terraces	Heritage funding	Site preservation	Funding uncertainty
	Crowd-sourcing	Extend seafront usage; potentially self-funding	Heritage/ environmental impacts
	Local Growth Fund, the Coastal Communities Fund		
	Mixed-use commercial redevelopment		
Seafront arches and supporting the A259	“Stewardship” model	Link to transport benefit	DfT funding being reduced.
	Department for transport (Dft) capital maintenance block	Increase yield while retaining non-high street tenant mix	Rental income unlikely to cover full funding need. Rental income currently used to support the wider Council revenue budget. Potential impacts on existing tenants
Transport solutions	Local taxation supplements / growth, DfT Local Transport Majors fund	Funding source linked to beneficiaries; established funding model	Only able to progress with local business agreement
	Parking income, Workplace Parking Levy	These funding sources are relatively within the Council’s direct influence	DfT funding being reduced.
	Congestion charging	Community opposition reduces once local benefits are experienced	Would have to divert from other uses
	Developer contributions	Reduces the risks to the Council and ensures development meets transport needs	Expensive to administer; limited examples of “resort” cities introducing congestion charging.
	Business Improvement District		Only able to progress with local business agreement
	Funded within the Council’s ongoing Urban Design Framework programme		Risk of localised economic distortion Lead times to negotiate section 106 agreements



Roadmap

The roadmap below takes each of the strategic activities identified as priorities in this process and sets out the next steps required for each one.

Key:



Green - already undertaken

Date - expected completion date



Orange - currently underway

N/A - Not applicable



Purple dot - required

Activities	Project description and rationale	Next steps										
		Transport solutions required for progress	Initial business case	Initial stakeholder consultation	Public consultation activities	Master planning activities	Business case	Agree funding package	Apply for funding	Development agreement	Planning application	Begin construction
King Alfred Leisure Centre	Redevelopment of the existing site, which includes a modern sports centre and residential properties, is a key priority for the Council.	○	■	■	○	■	■	■	N/A	■	2017	2018
Brighton Waterfront	A major new multi-use event and conferencing venue on the currently vacant Black Rock site adjacent to the Marina, and the extension of the Churchill Square shopping centre onto the existing Brighton Centre site. Transport and access to and from the Black Rock site is currently limited, and this is critical to the waterfront's deliverability.	○	■	■	○	○	■	○	N/A	○	○	○
Madeira Terraces	Commercial redevelopment of the Terraces to help fund regeneration of the city's iconic heritage infrastructure. This project is the cornerstone of the Council's Madeira Drive Regeneration Project.	○	■	■	N/A	○	○	○	■	○	○	○
The arches / A259	There is not currently a plan in place for redevelopment of the arches that run eastwards from the i360 to the Brighton Palace Pier and support the A259. The stewardship model should be optimised and conditions should be created to support commercial enterprise.	N/A	○	○	N/A	○	○	○	○	○	○	○

Alongside project specific actions, the Council needs to follow a structured implementation plan which incorporates the following:

- » Ongoing public and stakeholder engagement.
- » Phased development.
- » Commit to coastal defence objectives within the Shoreline Management Plan
- » Development of a clear implementation plan which ensures construction impacts are minimised.



Further recommendations

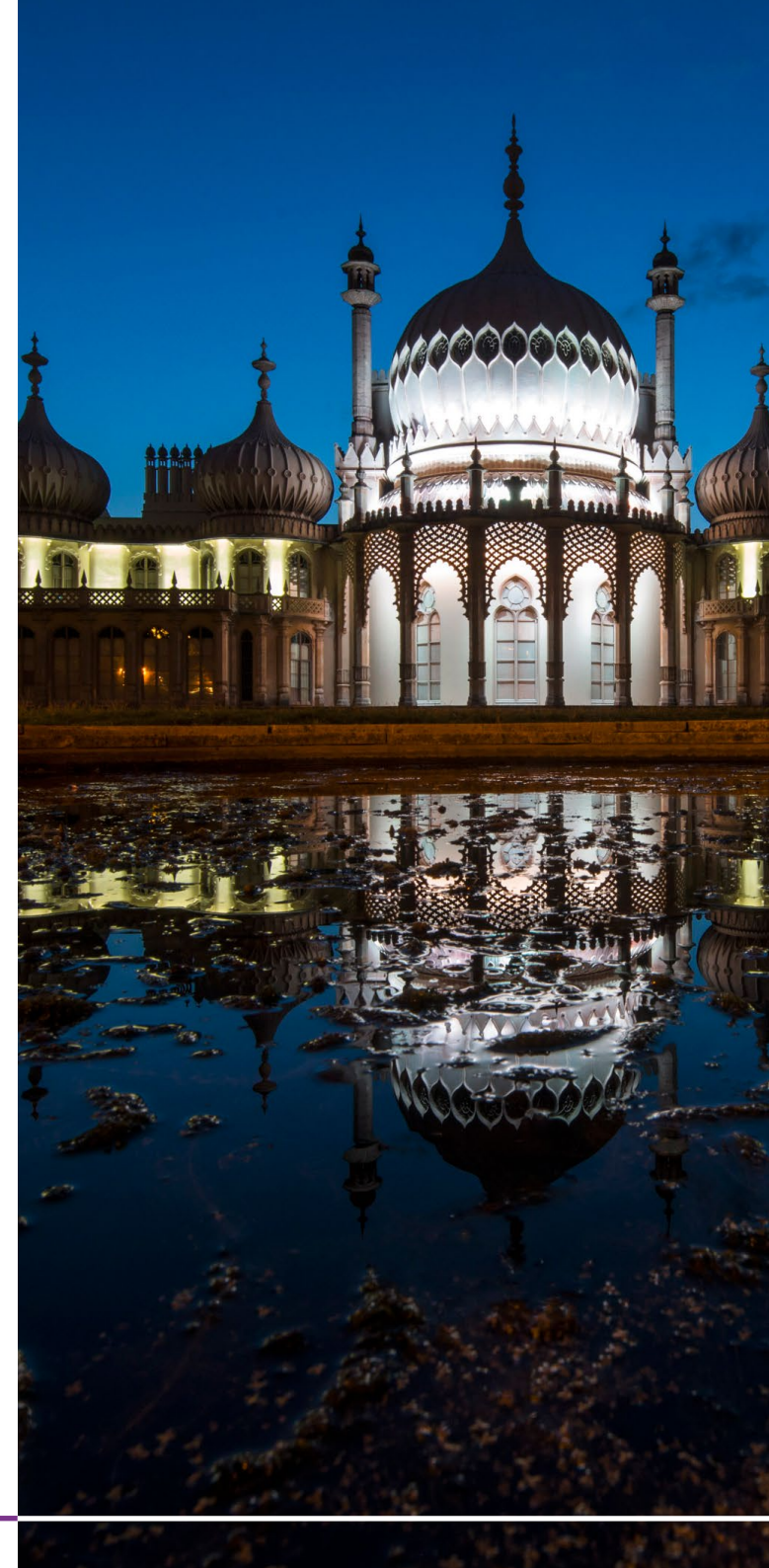
A comprehensive transport solution - seafront accessibility needs to be improved via the development of a comprehensive and modally integrated seafront transport plan in order to optimise access. The Council has plans to progress with the **Coastal Transport System** as included in the approved City Plan Part 1.

Public realm -¹² it is recommended that a pedestrian environment audit should be undertaken in order to fully understand where public realm improvements should be prioritised along the seafront. This study would also identify areas which would benefit from sustainable transport (walkways/cycleways) investment. A more comprehensive 'wayfinding exercise' that highlights the various attractions along the seafront has also been highlighted as a key method to optimise visitor foot traffic along the length of the seafront.

Parking and traffic management - the Council is committed to exploring all the opportunities and benefits that current and future technology could provide to help manage its parking on the seafront in the most efficient, effective and customer-friendly way.

Madeira Drive Regeneration Framework - stakeholders are already working together to identify priorities for seafront development and oversee progress. This collaborative working should be maintained.

Property portfolio review - a priority action should be to undertake more in-depth analysis of rent yield per square metre by type and usage of the Council's seafront stakeholder group units along the seafront. It will be crucial to maintain the diversity of the seafront vendor offer whilst optimising the revenue from these assets in order to support the sustainability and regeneration of the seafront.



1.

Introduction

Seafront overview

Ten million day trips and nearly five million visitor nights were spent in Brighton and Hove in 2014. With a visitor spend of **£830 million throughout 2014** the tourism sector supports approximately **15,900 full time equivalent jobs** and 21,682 actual jobs. Tourism is a vital part of Brighton and Hove's economy^{13,14} translating to roughly 14% of all jobs in the city's economy.¹⁵

Brighton & Hove's seafront plays a key role as a flagship destination for the city attracting visitors and investment alike. Offering over **13km of entertainment and activities**, the seafront is the city's largest entertainment venue offering hundreds of retail and leisure opportunities. The Brighton Palace Pier alone, one of the primary attractions along the seafront, receives over **six million visitors a year**.¹⁶

To the far west in Hove the seafront is primarily adjacent to residential areas providing informal recreation spaces as well as more formal facilities



such as Hove Lagoon and the King Alfred Leisure Centre. Moving east towards Brighton the seafront is characterised by a vibrant range of commercial, retail and leisure attractions, which are currently the hub of the tourism offer. Continuing east beyond Brighton Palace Pier are the famous Madeira Terraces, Brighton Marina and Saltdean and Rottingdean, providing a range of outdoor recreational space and facilities for residents and visitors.

With its unique character combining nationally and internationally renowned Victorian infrastructure (**over 476 Grade I and II Listed buildings**)¹⁷, the seafront forms the centrepiece of the city's heritage and architectural offer. It has a varied range of retail and

leisure facilities with over 100 tenants housed along the seafront in the arched units.¹⁸ Many of the city's largest **annual outdoor events** are hosted on the seafront's Madeira Drive¹⁹, including the Brighton Marathon, classic car runs and London to Brighton bike rides.

Brighton and Hove City Council has long since recognised the importance of the seafront to the city's economic growth. This was evidenced by the significant Brighton Seafront Initiative²⁰ regeneration activities undertaken in the 1990s, with regular seafront strategies published since. The most recent publication was the Draft Seafront Strategy (2012).²¹

Overview of the seafront



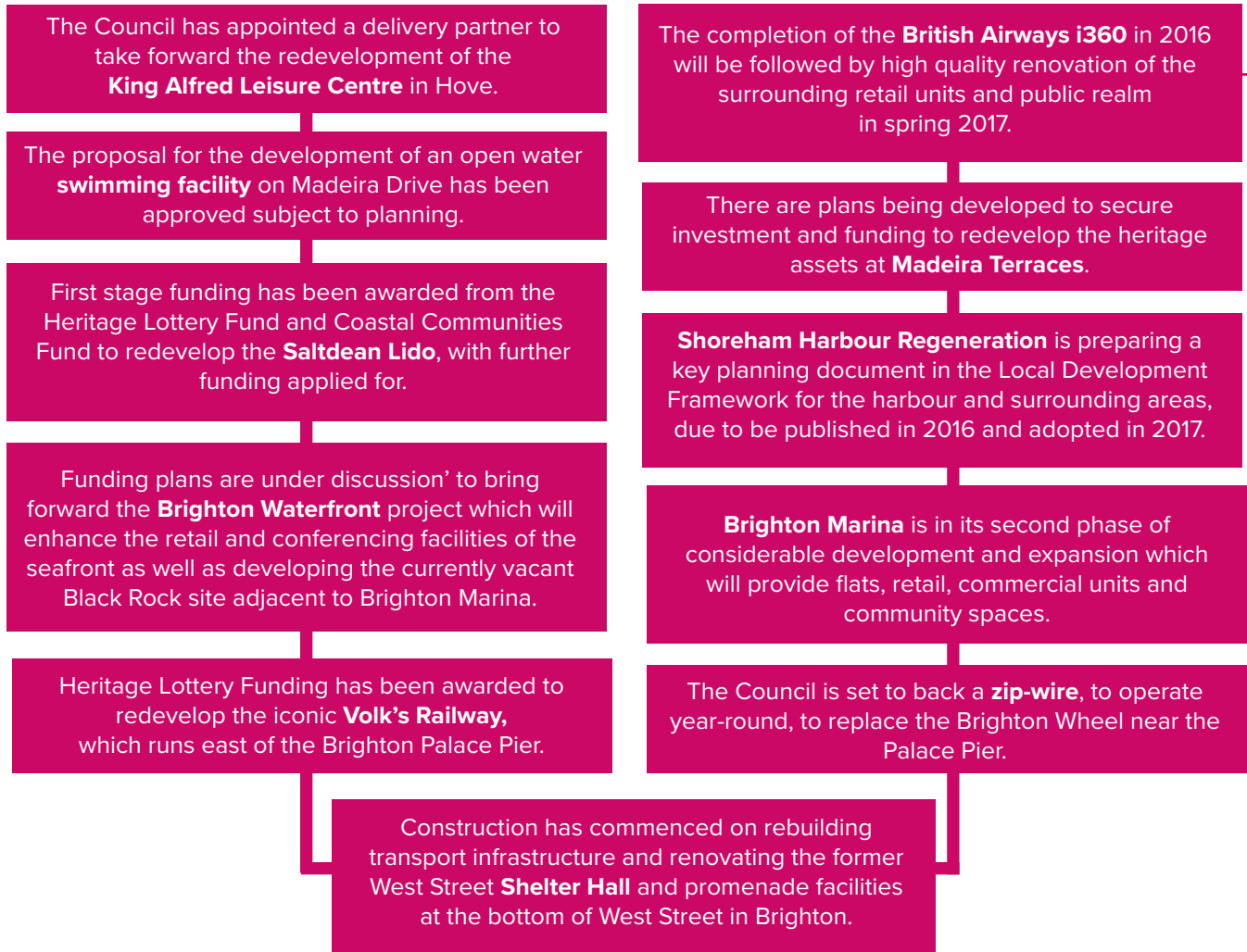
Key opportunities

The seafront comprises both the beach side of the promenade, where the seafront arches, the Brighton Palace Pier and seaside leisure activities are located, as well as the key attraction sites and businesses on the A259 and promenade which run parallel to the coast. The A259 itself is a core access route for motorists, pedestrians and cyclists. It also joins up key assets, such as the Brighton Centre, Brighton Marina and the numerous seafront hotels, as well as providing a link into the city.

However, in the past, the seafront has often been considered separate from the city centre. The focus has remained on the footfall along the promenade, south of A259, and activities focused on the beach. Going forward, there is a real opportunity to conceptualise the Brighton & Hove seafront as one asset. Increased permeability from the city to the seafront and engagement of stakeholders on both sides will encourage such a vision. Also, a more integrated offer for visitors and residents can be presented as a result.

Much of the land along the seafront, as well as several key pieces of infrastructure (such as the integral A259 infrastructure and Madeira Drive), are owned by Brighton & Hove City Council. This represents a considerable advantage in terms of guiding the direction of the seafront going forward.

Considerable investment and development is already taking place along the seafront. The key activities are set out in the adjacent diagram:



The total value of current and planned developments on the seafront exceeds **£1 billion**,²² and is indicative of the strength that Brighton and Hove seafront currently wields in attracting investment and interest.

The Council is keen to maintain this development momentum and encourage additional investment in one of the most innovative cities in the UK.²³ It has a vision for the seafront to be a stronger, non-seasonal and economically viable attraction for the city. This plan is designed to set out an integrated approach to development and roadmap which aligns with the Council's vision.

The challenges ahead

Whilst the seafront is a valuable asset, a series of challenges present themselves in the short, medium and long term. These challenges are already compromising full use of the seafront and, without action, could act as a barrier to future economic growth. Addressing them is essential to enable Brighton & Hove to compete nationally and internationally with other coastal economies.



Heritage and tourism

The seafront's heritage infrastructure is one of the defining characteristics of the whole city. However it currently presents a notable risk. The deterioration of the Victorian Madeira Terraces along Madeira Drive, and the arches to the west of the Brighton Palace Pier, are significant and growing problems. As they fall into a state of disrepair, this is resulting in underutilisation of commercial units and represents a potential health and safety hazard to the public.^{24,25}

Investment to the east of seafront has been lacking in recent years. Development has traditionally been focused on the stretch between the Palace and the West Pier where most footfall is evident. This perpetuates the more limited interest in the eastern end of the seafront. Alongside this, despite the considerable variety of visitor attractions and activities currently available along the seafront (and those coming forward in the short and medium future), the linkages between these opportunities and the information available to visitors could be improved to provide more integrated seafront and city tourism offer.

Maintaining the current heritage infrastructure and strengthening the offer of attractions year round will be critical to sustaining the attractiveness of the seafront and ultimately influencing whether investors, businesses and visitors choose the seafront and Brighton & Hove as their locations and destinations.



Transport and accessibility

It is crucial to maintain the resilience of the transport network throughout the city and seafront whilst the programme of seafront works is delivered. The Council recognises this as a challenge to overcome and mitigate where possible so as to minimise potentially negative impacts of development.

Transport and connectivity to and from the seafront, as well as east and west along the full length of the city's coastline, is also constrained:

- » Public transport access along the seafront is regarded as inadequate, a problem which is likely to be exacerbated by additional development on the seafront itself, as this will create additional demand. Proposals for a Coastal Transport System to connect the seafront to Brighton station to the Marina in the east were included in the adopted City Plan Part 1 and the Greater Brighton project pipeline which followed, indicating that this is a growing priority, which aligns with the wider strategic plans for the city region.^{26,27}
- » The arches supporting the A259 require strengthening.²⁸ The multiple stakeholders involved in the ownership of the arches make the clarification of funding to undertake improvements difficult.

- » The A259 itself currently presents a physical barrier to pedestrians trying to access the promenade from the city. The former West Street Shelter Hall development, which has already commenced, will partly remedy this issue and will lead to improved accessibility, but more needs to be done to tackle pedestrian severance along the length of the seafront.

Improving accessibility is key to ensuring that the potential of investments and assets of the seafront can be fully realised and their location on the seafront is optimised for visitors to the area. This will return higher yields in terms of visitor spend to the city; resulting in a more prosperous seafront offer.



Environmental defences

As a coastal urban area, Brighton & Hove is at risk from flooding from three sources: surface water, ground water and the sea. The strategy for the current and future defence of the Brighton & Hove coastline is set out in general terms in the local Shoreline Management Plan (SMP)²⁹ which recommends maintaining the currently defended line. Going forward, the relevant strategy documents in place to implement the SMP recommend that, in addition to the preferred Hold the Line policy, capital schemes are required along the coast to reduce the risk of erosion and flooding due to wave overtopping. Improvement works to the lock gates at Shoreham are also recommended to address flood risk. Such recommendations require considerable investment; however they are central to unlocking and securing development west of the Marina from 2021 onwards.

Without commitment to these objectives, the risks to the seafront increase and in turn could drive away development.



Future investment

There are gaps in the funding needed to address the challenges identified above as the cost of infrastructure outstrips the funds currently available. For example, the funding required for the Madeira Terraces structural works alone is estimated by the Council to be in the region of £30 million.³⁰ This gap cannot be resolved by using public funds alone³¹; if the seafront is to overcome the challenges it faces, more innovative funding mechanisms will need to be utilised, together with reviewing the current income revenues in place along the seafront.



2. Objectives of the plan

The objective of the seafront investment plan is to develop the 'next steps' for seafront investment which will help steer and prioritise future investment decisions along the city's seafront. This document sets out to answer the following questions:

A.

Where are we now?

The plan provides a review of Brighton & Hove's existing seafront infrastructure and planned seafront investment to provide a comprehensive overview of current activity.

B.

What are the future seafront priorities?

The plan articulates a shared set of priorities for further investment to develop and enhance the city's seafront offering.

C.

What funding and investment opportunities exist?

Options are considered for new models of investment to secure the regeneration of the city's seafront

The work to inform this plan has been undertaken between July 2015 and July 2016 by Mott MacDonald and Grant Thornton on behalf of Brighton & Hove City Council based on information available at the time. Evidence has been drawn from a series of activities including a review of business planning and project proposal documents, engagement with project managers and local stakeholders, a survey with vendors along the seafront, and an interactive workshop with key members of the Brighton & Hove seafront stakeholder group. A high level review of the seafront property portfolio managed by the Council was also undertaken. A more comprehensive summary of activities undertaken to evidence these steps is detailed in Appendix A.

Strategic context

The adopted City Plan was published in early 2016. Within this the seafront is recognised as the 'shop window' for the city and is covered by Special Area Policy 1 (SA1)³². The priorities set out within SA1 provide a framework to ensure that development proposed in this plan aligns with planning objectives at the city level.

The city plan set out that the Council will work in partnership to ensure the **on-going regeneration and maintenance** of the seafront in an integrated and coordinated manner. Proposals should **support the year-round sport, leisure and cultural role of the seafront** for residents and visitors whilst **complementing its outstanding historic setting and natural landscape value**.



The priorities for the whole seafront (in addition to some site specific seafront priorities) are to:

- » Enhance and improve the public realm and create a seafront for all; to ensure the seafront is accessible to everyone.
- » Promote high quality architecture, urban design and public art which complements the natural heritage of the seafront.
- » Secure improvements to sustainable transport infrastructure along the A259.
- » Monitor, conserve and expand designated coastal habitats.
- » Work in partnership with the Department for Environment, Food and Rural Affairs (Defra), the Environment Agency, Natural England and Southern Water.
- » Encourage consideration of low and zero carbon decentralised energy.

3.

Where are we now?

a. Introduction

There are several key seafront projects which are already underway or remain Council priorities for development, and will bring the amount of potential investment along the seafront to over £1 billion in future years.

The projects are wide-ranging. Collectively they will enhance the heritage offer (e.g. the regeneration of the Volk's Electric Railway), provide improved recreational facilities (e.g. redevelopment of the King Alfred Leisure Centre and the restoration of the Saltdean Lido), improve pedestrian and cycle infrastructure (e.g. the West Street Shelter Hall works) and add to Brighton & Hove's visitor attractions (e.g. the British Airways i360).

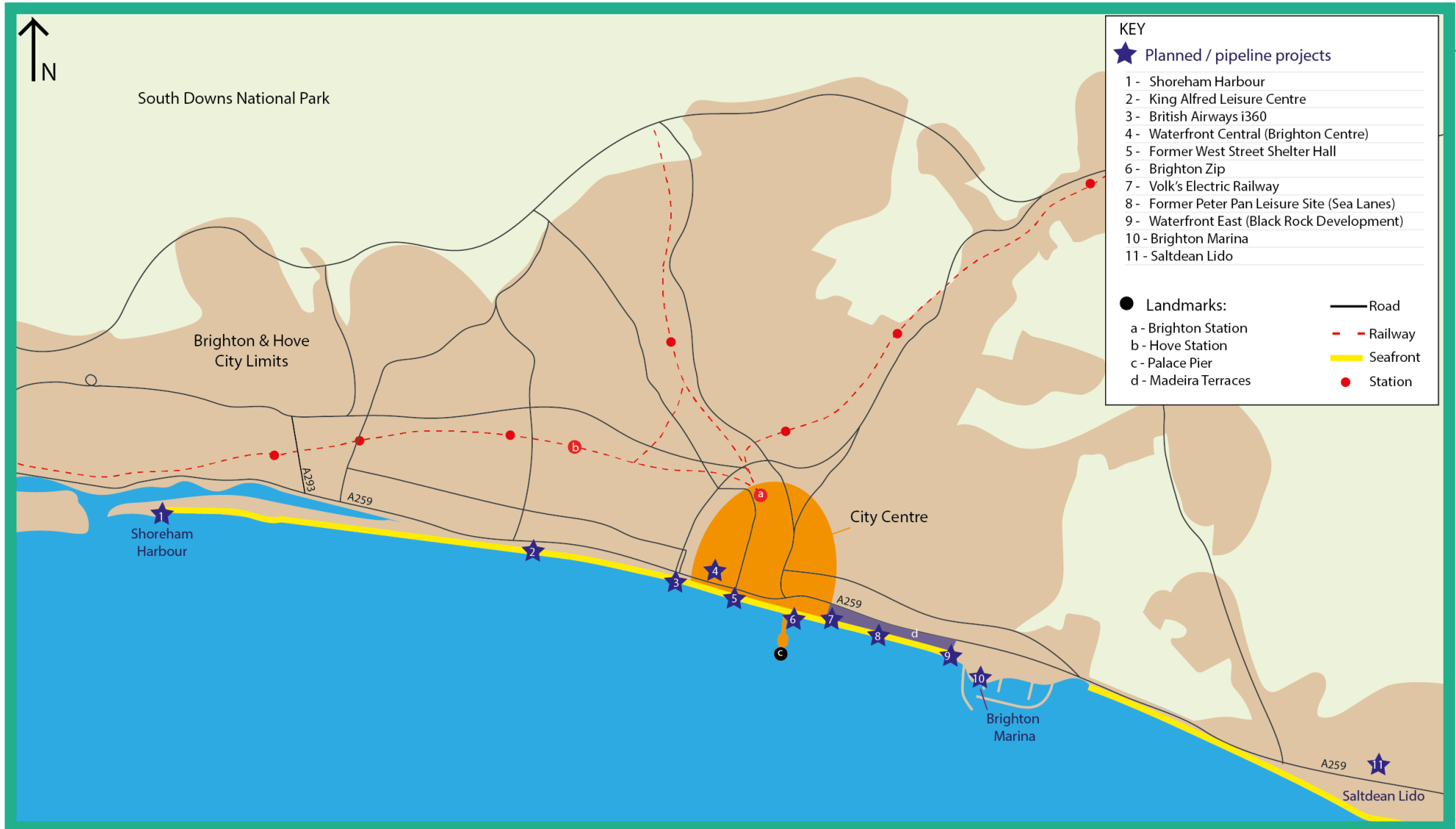


All of these projects share some common “success factors” including:

- » A strong business case setting out the project's strategic merit and its economic benefit to the seafront and wider city.
- » An appreciation of the seafront's unique heritage.
- » A robust financial and commercial strategy capable of attracting external investment.

The map overleaf illustrates the location of each of these planned and pipeline projects; indicating how they relate to each other spatially on the seafront.

Map of current planned and pipeline seafront investment



Summary of planned and pipeline projects

There is a significant programme of development already underway along the seafront. Some of these key projects fall within the remit of the Council and are being managed directly or indirectly.



Council led

King Alfred Leisure Centre Site

Project lead: Brighton & Hove City Council

Brief summary: The ageing King Alfred Leisure Centre is a sport and leisure facility (including a 25m swimming pool, fitness gym and sports halls). It is expensive to run and does not meet modern expectations. Redevelopment of the venue, including the additional provision of housing at the site, is a priority for the Council.

Current status: On 21st January 2016, the Council's Policy and Resources Committee appointed Crest Nicholson in partnership with the Starr Trust as the preferred developer partner to take forward the development of King Alfred Leisure Centre.

Project cost: £40 million for the sports centre only.³³

Additional economic value:

High level Mott MacDonald economic impact assessment estimates forecast as many as 133 net jobs could be facilitated at the King Alfred site as well as indirectly via the supply chain and other locally impacted firms. This is estimated to translate to roughly £6.6m gross added value (GVA) per annum under these new plans.

Timeline for development:

- » A planning application is expected to be submitted in 2017.
- » An indicative timescale for completion is 2020.



Brighton Waterfront Central and Waterfront East (Brighton Centre / Black Rock development)

Project lead: Brighton & Hove City Council / Standard Life Investments

Brief summary: The objective of this project is to deliver a major new multi-use event and conferencing venue on the currently vacant Black Rock site next to the Brighton Marina. This would be funded in part through the sale of the Brighton Centre site (the city's current conference centre situated in between the two piers) to Standard Life Investments, which would use this site to extend the existing Churchill Square shopping centre so that it faces directly onto the seafront.

To date there has been some delay due to the need to ensure transport and access for visitors from the city centre to the site at Black Rock. Standard Life and the Council are now undertaking a master planning exercise on the Black Rock site to understand how this transport accessibility issue can be overcome.

Current status: WilkinsonEyre Architectural firm has been appointed to develop a masterplan for the city's Waterfront scheme. On 29th April 2016, the Council agreed a funding structure with Standard Life Investments.

Project cost: The total project value is £540 million.³⁴

Additional economic value:

The Council anticipates 2000 net additional jobs will be facilitated by this development. Approximately £150m per annum of net additional expenditure is expected in the city, with an additional £4.6m per annum to the Council through the conference facility.³⁵

Timeline for development

- » Signing of conditional Development Agreement anticipated for June 2016.
- » Completion of Waterfront East site (at the Black Rock site) anticipated summer 2020.
- » Completion of Waterfront Central site (at the current Brighton Centre site) anticipated for summer 2021.



Seafront landscaping of the land either side of the British Airways i360

Project lead: Brighton & Hove City Council

Brief summary: Following completion of the British Airways i360 the Council is undertaking a complementary landscaping project, covering the land owned by the Council adjacent to the tower. To the west of the British Airways i360 the urban realm will accommodate new seating and a flexible event space. To the east there will be a piazza with a focus on heritage and the West Pier.

Current status: Tender stage.

Project cost: £1.99m from the British Airways i360 revenues.

Additional economic value:

Value to be obtained from event space unknown to date.

Timeline for development

- » Completion expected Spring 2017.
- » Construction commenced in 2015.



Former West Street Shelter Hall

Project lead: Brighton & Hove City Council

Brief summary: The Shelter Hall is the third phase of a programme to strengthen, re-build and stabilise the seafront highway structures that support the A259 and upper promenade along Kings Road. The project involves the rebuilding of the highway structure which supports the primary A259 corridor and the strategically important West Street junction. This area also serves as the main pedestrian link from Brighton's main railway station to the seafront. The scheme will provide a new highway structure that can accommodate modern highway loadings with a minimum design life of 120 years. It will also provide a remodelled and safer junction at the West Street / A259 intersection point and deliver modern commercial business premises. The project, once completed will afford better and safer transport and pedestrian movements, a structure that is fit for purpose and safe for use and the regeneration of this area of seafront.

Current status: Under construction.

Project cost: £9m investment award from the DfT's Highways Maintenance Challenge Fund (with a remaining £1.5m coming from the Council).

Additional economic value:

Given the site size and assuming commercial land use, minimal wider economic impacts in terms of employment and GVA is estimated.

Timeline for development

- » Construction commenced in October 2015.
- » Completion expected in 2018.



Volk's Electric Railway

Project lead: Brighton & Hove City Council

Brief summary: Volk's Electric Railway is the world's oldest working electric railway. A scheme is in place to conserve the original Victorian carriages, develop a new station and a new visitor centre to attract more visitors, as well as a new conservation workshop.

Current status: Underway.

Project cost: £1.65m from the Heritage Lottery Fund.

Additional economic value:

Redevelopment plans will not create additional space for jobs, so there would be minimal economic impact in terms of net additional jobs and contribution to GVA. The development would, however, help to safeguard the number of visitors to the attraction.

Timeline for development

- » Construction on site is due to commence in October 2016.
- » Completion of works are likely to be May 2017.



Other key Council led projects

Further projects may come forward in future months and will require ongoing development work. For example:

» Madeira Drive Regeneration Framework:

Brighton's eastern seafront has become an important cause for local residents, business and policy makers. In recent years, sections of the Madeira Terrace have had to be closed as the structure deteriorates, leading to the closure of local businesses hosted in these arches, the loss of the terraces as a public amenity and the necessary installation of visually intrusive safety measures to prevent access. The Council and associated stakeholders are working together to propose the best commercial solutions to redevelop the area and create a year-round usable space that extends the total footfall along the seafront right through to the Marina. Various bids for funding to assist with this, (including recently to the Government's Coastal Communities Fund in July 2016) will need to be made, in order to move towards an overall solution that is both fundable and deliverable and links with the wider regeneration of this section of seafront.



Non-Council led

Further projects that are planned to come forward and require further development work include the following:

British Airways i360

Project lead: West Pier Trust

Brief summary: The British Airways i360 is a 170m high observation tower constructed on the West Pier site in Brighton.

Current status: Under construction.

Project cost: £46.2m (BHCC senior loan £36.2m, equity investors £6m, Coast to Capital Local Enterprise Partnership (LEP) junior loan £4m).

Additional economic value:

Estimates from the architects³⁶ suggest an attendance of 822,500 in the first year of operation, falling to 697,500 per annum three years after opening. This is expected to generate £7.5m in ticket income in the first year of opening. Tourist revenues are predicted to increase by £13.9m to £25.4m per annum with an additional 16,000 to 305,000 visitors to the city and an extra 27,000 to 49,000 overnight stays per annum.³⁷ British Airways i360 estimates 169 full time equivalent (FTE) direct and indirect jobs will be created by the attraction.

Timeline for development

- » Construction commenced in 2014.
- » Opened August 2016.



Saltdean Lido

Project lead: Community Interest Company

Brief summary: In 2013 the Saltdean Lido Community Interest Company (SLCIC) was appointed as preferred leaseholder to restore the Lido. The SLCIC are currently completing a Stage 2 Heritage Lottery Fund application to seek grant funding of over £4m which would include:

- » A scheme to restore the main building sensitive to the Grade II Listing of the Lido.
- » A business case with income generating uses which would fund the sustainable operation of the facility.
- » Improvements in environmental sustainability of the facility

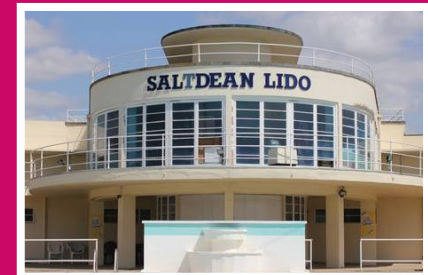
Current status: Works to restore the external main pool, children’s pool and provide a new pool plant room are underway. These works are funded primarily by a Coastal Communities Fund grant and are due to be completed by spring 2017 to enable use of the pools in summer 2017.

Project cost: The restoration of the external pool works is primarily being funded by a grant of over £2m from the CCF. Further grants of over £4m (HLF) and over £3.5m (CCF) are being sought to fund the restoration of the main Lido building.

Additional economic value:

Given the nominal employment space created at this site, there would be minimal economic impact in terms of net additional jobs and contribution to GVA.

- » External works due to be completed in spring 2017.
- » Timescale for restoration of main Lido building dependant on outcome of grant applications.



'Sea Lanes' open water swimming facility

Project lead: Private developer

Brief summary: The now vacant leisure site east of the Brighton Palace Pier, was re-marketed in summer 2014. The Sea Lanes proposal, which includes an open water swimming facility and associated leisure retail units, was chosen by the Policy & Resources Committee as the preferred development in 2015.³⁸

Current status: Landlord's consent has now been approved and Heads of Terms for a 150 year lease agreement agreed.

Project cost: Approximately £4.5m privately funded by the developer.

Additional economic value:

It is difficult to assess the economic impact as the scheme is not yet finalised.

Timeline for development

- » A planning application is anticipated to be submitted at the end of summer 2016.
- » Subject to planning consent being granted building on site could start in 2017.



Other key non-Council led projects

- » **Shoreham Harbour:** A harbour-wide JAAP is currently being prepared and will include: designations for new areas of housing, mixed-use schemes and employment space, protecting and enhancing the role of the port in its function as a key local industrial hub, regionally important site for the landing and handling and processing of waste and minerals, A transport strategy to promote a package of integrated sustainable transport measures, clear guidance for developers prepared in liaison with the Environment Agency to ensure new developments are resilient to future flood risk, and improving the waterfront and visitor experience; enhancing the area's historic, environmental and leisure assets. This project seeks to address the coastal defence challenges highlighted in the introductory section of this document.
- » **Brighton Zip:** Paramount Entertainments Ltd (the tenant which previously operated the Brighton Wheel) has been granted landlord's consent to replace the Wheel at the site adjacent to Palace Pier with two 300m-long zip-wires. There will be a cable from a 20m tower to a landing area on the beach. A drop-zone from the tower and a new café are also proposed. A planning application has been submitted and a decision is expected in September 2016.
- » **Brighton Marina** is also the focus of investment and regeneration in a phased programme of works including considerable residential and commercial development.

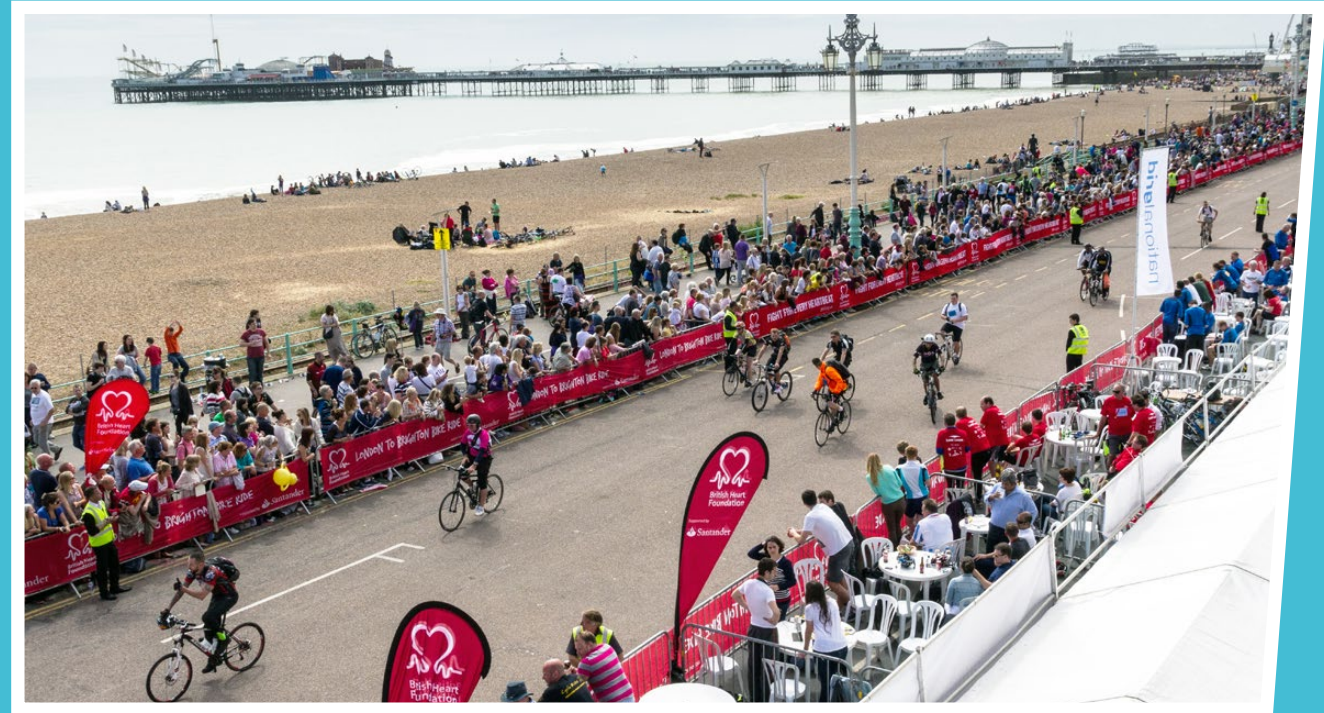
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Future seafront priorities

Overview

In addition to projects in the pipeline, which are already under way or have funding packages in place, there are several priorities along the seafront which maintain strong stakeholder and political support and have a robust strategic, economic and commercial case.

The majority of stakeholders engaged during the development of this plan have identified the regeneration of Madeira Drive as a key priority for the Council, as an opportunity to extend footfall eastwards, to improve connectivity between the pier-based activity and the Marina, and to reduce seasonality of this portion of the seafront. Within this area of development, the terraces and colonnade along Madeira Drive are the most important area for investment.



Connectivity remains a key feature of planning for the future of the city's seafront; this is a view which is widely supported by stakeholders. This needs to include:

- » Improvements to achieve the safe and efficient movement and flow of people and traffic along and across the A259 to reduce congestion, and connections with the lower promenade and beach/sea.
- » Maintaining and improving the transport and highway infrastructure.
- » Public realm improvements to the overall visitor/user experience, which will create a positive and lasting impression and therefore generate return visits, longer stays and positive feedback.

Emerging priorities

Through a process of stakeholder engagement, a set of priorities has emerged for Brighton & Hove's seafront. These options were identified as important in order to tackle the challenges currently faced and to secure a sustainable future for the whole length of the seafront. The priorities seek to build on the findings of the Seafront Scrutiny Infrastructure Panel Review³⁹ and they are considered vital to the future vision and realising the economic potential of Brighton & Hove's seafront.



(i) Madeira Terrace and Madeira Drive

Brief summary: The Victorian Madeira Terraces, to the east of the seafront are a listed structure running along the seafront east of the Brighton Palace Pier on Madeira Drive.

Engineers have inspected the structure and have advised that it is no longer safe to use.⁴⁰ They have recommended that pedestrians and vehicles are kept away from the structure in case of collapse. As such, the entire length of the Terraces has been closed to the public. This has resulted in the closure of one business and the relocation of another as well as reduced access between Marine Parade above the Terraces and the seafront below. Parking and access to other businesses and outdoor events have been maintained.

The Terraces are a key focus of the Council led Madeira Drive Regeneration Framework. The Council has used funding from the Department for Communities and Local Government's (DCLG) Coastal Revival Fund to develop a master plan and investment options. The cost of repairs is currently estimated at £30 million, and the preferred option at present involves a mix of commercial and retail/leisure uses within the arches to contribute to the cost of renovating the arches whilst maintaining their historic nature.

An application was submitted to the Coastal Communities Fund in July 2016 to account for a proportion of the total cost of this project however the final funding arrangement has not been agreed.

Madeira Drive has limited infrastructure (e.g. water / internet) to help with operation of events. This is both a challenge and (if addressed) a potential opportunity when considering the many events that are and could be hosted at this space going forward. One example from elsewhere is the establishment of basic infrastructure at Wembley car park, which can now host events as well as offering car space.

Potential funding options: renovating for commercial use / Coastal communities fund / ongoing management post-re-occupation / crowd-funding (more detail in following chapter)





(ii) Development of the seafront arches and linkages to the A259

Brief summary: The historic arches support the seafront promenade and are a vital part of the seafront infrastructure. Built over 120 years ago, they are home to over 100⁴¹ tenants offering a diverse land use mix, and support the key commuters and visitors route the A259. The arches either side of the British Airways i360 are currently undergoing major renovations. Phase one of the work is complete; it involved rebuilding, strengthening and refurbishing the arches between Alfresco restaurant and the former West Pier. Phase two of the work is complete and will be opening in Spring 2017.

There is not currently a plan in place to redevelop the remaining arches that run eastwards from the i360 to Brighton Palace Pier and support the A259. These arches require strengthening.⁴² The key challenges are as follows:

- » supporting the A259;
- » attracting businesses to the arches to improve associated revenues, whilst maintaining the eclectic feel of trade along this stretch of the seafront; and
- » optimising and improving movement east-west along the seafront

The Council anticipates the project cost to be in the region of around £100m* in total;⁴³ funding arrangements are not currently in place. The arches need to be recognised as the key driver behind unlocking redevelopment of the fundamental A259 transport link which they support. As such this project needs to be considered as two fold: 1) development of the arches, and 2) public realm improvements to the upper promenade along the A259.

In order to address the accessibility challenges facing the seafront, this project requires direction from the Council on how transport is being addressed from a holistic/city level, before designs for an improved A259 can be started.

Potential funding options: DfT capital maintenance funding / ongoing management post-reoccupation / ring-fencing of rental income / optimising rental income over the longer-term by the Council, as landlord, taking a more active revenue-focused role in the stewardship of these important assets (more detail in following chapter).

*This figure was estimated in 2014 to cover the cost of restoring the arches, retaining walls and railings only.



(iii) Transport and accessibility: managing people's movement

Accessibility is key to the seafront's success, and currently it is a challenge to access the full offer on foot. A recurring theme throughout the engagement has been support for providing a sustainable, public transport service with integrated options and solutions to enable residents and visitors to easily access the full range of sites and assets along the seafront.* In particular stakeholders identified the success of key proposals, such as the Brighton Waterfront project, as being ultimately dependent on access for visitors. In the case of the Waterfront project this relies on transport of delegates from the station and some of the key hotels west of the Brighton Palace Pier.



A259

Improvement to movement and flow of people and traffic along and across the main coast road to reduce congestion, maintain and improve the attraction of the seafront environment and increase opportunities for economic and recreational activities. Measures could include corridor length investment in initiatives such as Intelligent Transport Systems (ITS), or reallocation of roadspace, tailored to the individual conditions and functions of different sections of the route and the different volumes of people using them.



Public realm along the seafront

High quality public realm is key to attracting investment to an area, as it contributes to attractive, safe and comfortable environments for visitors and residents. High quality public realm via signage can contribute to improved navigation of an area. Wayfinding and improved signage are one of the key tools used by Transport for London to ensure visitors engage with areas and facilities as much as possible.⁴⁴ In 2007 the Council undertook a review of routes, crossings, barriers, connectivity and activity⁴⁵ which identified the priority areas for investment along the eastern seafront. There is an opportunity to use this information to further regenerate the seafront public realm (particularly around the eastern seafront); ensuring the seafront is easy to use and navigate. A Business Improvement District scheme would contribute to this sort of initiative.



Coastal Transport System

The concept of a high frequency, limited stop, public transport route along the seafront to better connect venues and attractions has been proposed previously. Referred to as 'Coastal Transport System', it has been developed through several iterations of research and feasibility over the past ten years which forms a core aspect of the transport solutions required to meet the integrated needs of the seafront. It is currently a relatively long term proposal (2024) in the Council's approved City Plan Part 1,⁴⁶ and also features in the Greater Brighton project pipeline.⁴⁷ This project is a bus-based, rapid transit initiative connecting the city's seafront from the Marina in the east, to Shoreham Harbour and then on to Worthing in East Sussex. Considerable funding would be required for such a scheme; undertaking a business case would allow options for routing to be reviewed and funding methods to be tested.

Progressing further with the Coastal Transport System plans would also enable key considerations, such as access to the Waterfront East site development at Black Rock and the Marina, to be explored and therefore considered alongside the strong stakeholder support that has been expressed.

Any routing options would need to consider the appropriate balance that needs to be given to different forms of transport such as the amount of infrastructure and priority provided for walking, cycling, road traffic, parking and public transport on a daily basis on the upper (A259 Marine Parade) and lower (Madeira Drive) levels. The ability to hold significant local and national events on the seafront also needs to be factored into considerations.

Potential funding options: Local Growth Funding; local taxation supplements or growth; fare box (more detail in following chapter).



Highway structures

The Council plan to undertake a continued programme of assessment and renewal of structures supporting the A259 coast road to maintain strategic and local movement and create refurbished and additional commercial floorspace. Opportunities to better manage and improve movement along and across the corridor will be identified and taken, when appropriate.



Parking and traffic management

Managing movement and use of the seafront can be achieved in a number of ways, depending on the primary objective either along the entire route or within particular areas. Use of the seafront is influenced by many factors (e.g. season, events). Systems therefore need to be able to provide for different users/vehicles e.g. cars, coaches and lorries/vans, and be flexible to enable different circumstances or needs to be accommodated. Reductions in demand for movement through other interventions such as park and ride or increased public transport services would also require different or alternative solutions.

Other issues

Throughout the engagement process some further suggestions for action emerged, in addition to the above priorities. These should also be considered going forward particularly during the implementation phases of this development plan:

Development needs to be phased so that it can be managed and does not cause undue disruption to existing businesses and tourism. A realistic phased approach needs to inform the roadmap of next steps.

Priority needs to be given to public engagement. This should include engagement with both residents and visitors. It was suggested that an engagement strategy needs to be developed as seafront priorities are progressed further.

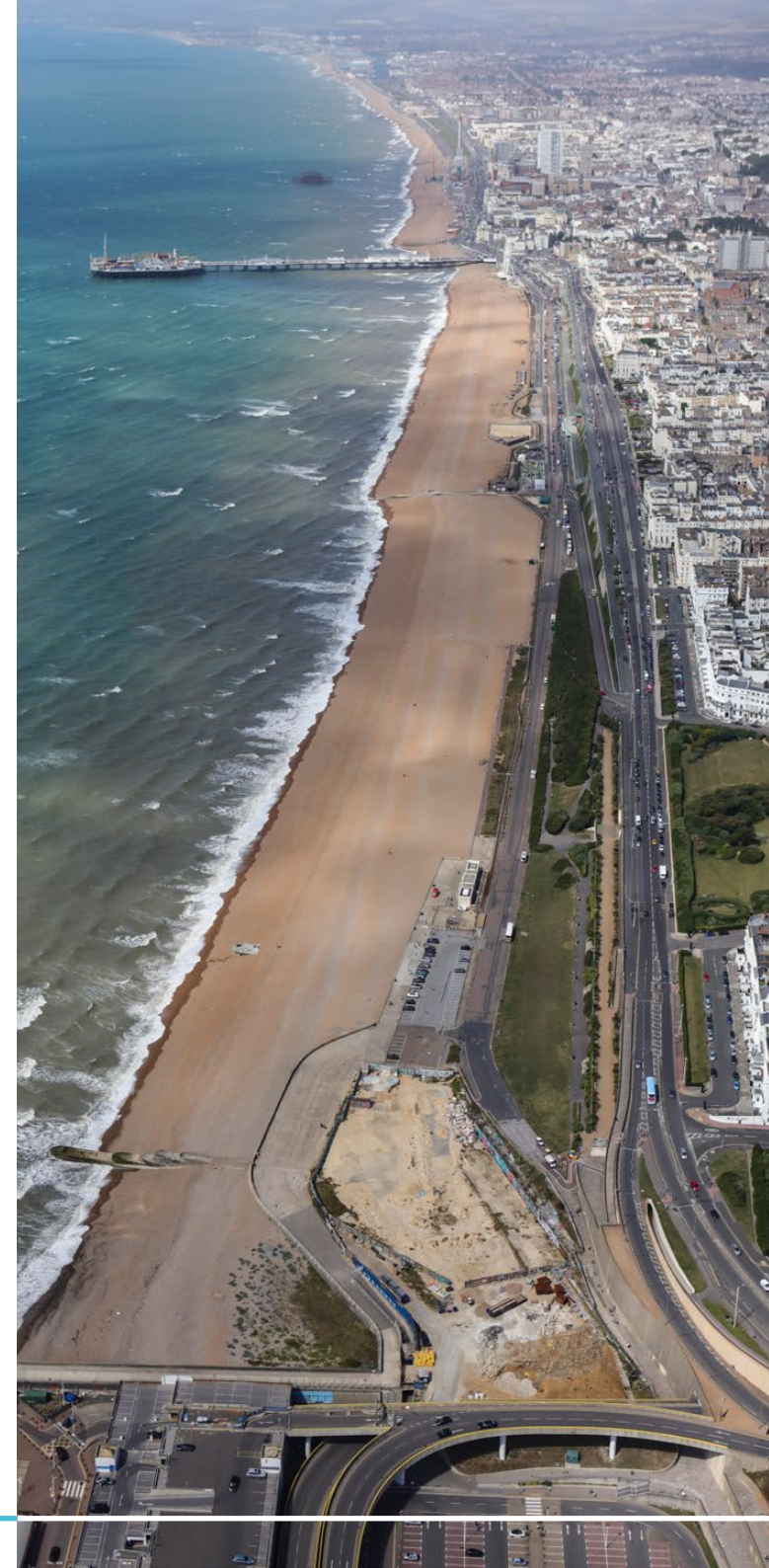
Careful management of construction alongside the existing day and night activities will be important to minimise disruption and the negative impacts of investment.

New development needs to be considered carefully within the planning policy context and planners need to be fully involved going forward.

There is a need to consider how stakeholders will be brought on board and how the full benefits/impacts of projects can be marketed.

Important stakeholder groups such as Brighton Marina, Shoreham Harbour, owners of the Pier and English Heritage, need to be included earlier on in planning and transport infrastructure discussions when considering investment across the whole of the seafront.

Investment in coastal defences and the objectives within the Shoreline Management Plan should remain on the agenda.



Investment prioritisation

All of the investment priorities identified above have clear stakeholder support and are merited in terms of their need to overcome some of the challenges that Brighton & Hove seafront is facing. By way of attempting to indicate the comparative strategic and economic strength of these emerging options and their readiness for delivery, a prioritisation exercise has been undertaken, using a framework established and agreed with the Council. The aim of this exercise is to indicate which projects should be short, medium and long term seafront investment priorities.

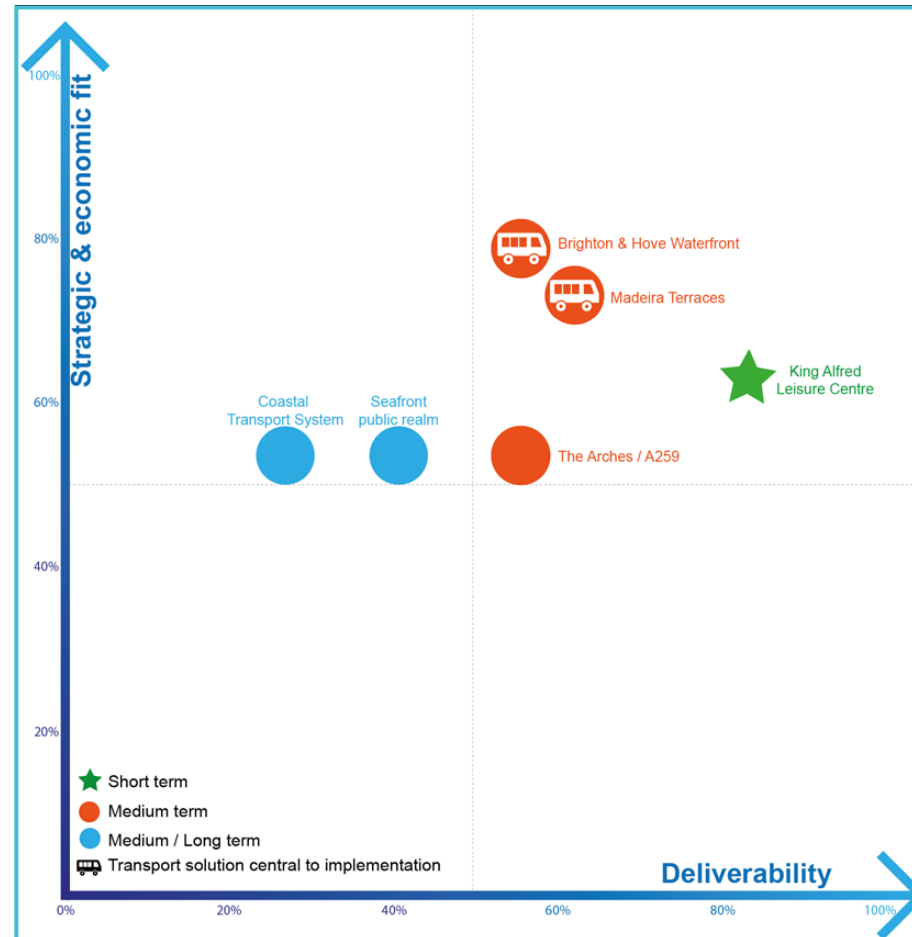
This prioritisation exercise considers all projects and priorities which are:



In terms of transport related priorities, this process considers the A259 improvements, the Coastal Transport System and seafront public realm as options that the Council can consider within this seafront infrastructure context. It is understood that transport and accessibility are interlinked and therefore should be considered as an associated project of works.

The prioritisation criteria focus on strategic/economic fit (i.e. whether the outcomes of the project align with priorities for the city) and deliverability (i.e. whether a business case exists and resources are in place to take implementation forward). The outcomes of the prioritisation framework are demonstrated in the diagram below.*

Throughout this exercise it became apparent that there were interdependencies between several development priorities. Most notable is the reliance of some key projects east of the Brighton Palace Pier on improved transport and accessibility.



*In order to model the economic deliverability of some projects where an agreed funding package has not been agreed and/or anticipated economic impacts in terms of jobs and GVA have not been modelled, assumptions have been made of the relative scale of such development.

Brighton Waterfront Project

The Brighton Waterfront project returned the highest strategic fit score compared to other projects and priorities.

This is largely due to the projected economic impacts of this development, the alignment of the project's objectives to the city's visitor economy objectives, and the opportunity to anchor development to the east of the Brighton Palace Pier. The funding agreement agreed in June 2016 contributes to a relatively strong deliverability score, which is likely to be higher once the masterplan, transport strategy and design

documents for both the Black Rock site and Brighton Centre site have been finalised and agreed with the Council.

Madeira Terraces

Similarly, regeneration and development of Madeira Terraces scores highly in terms of strategic and economic fit.

There are several reasons behind this including recognition in planning documentation and local stakeholder support of the strategically significant role Madeira Terraces have for the wider city. The potential

economic opportunities of redevelopment, and the associated seafront and visitor economy value are also acknowledged. This project aligns strongly with the heritage, tourism and economic development priorities of the seafront. At present, the deliverability score is deemed lower due to the absence of a refined business case and associated funding. There are plans for development of Madeira Terraces as part of the Madeira Drive Regeneration Strategy; once a business case for commercial redevelopment of this project is finalised and funding has been fully agreed the deliverability score for this project will increase and push the priority of this project higher.

Short – medium term priorities

Short term priorities

King Alfred Leisure Centre

The King Alfred Leisure Centre scores highest of all the projects in terms of project deliverability.

The project returned a relatively high score for strategic fit owing to the project's placement as a strategic allocation site for the western seafront in the recently adopted City Plan (adopted in March 2016⁴⁸) and its contribution to housing targets for the city. The project also scores highly as a result of strong progress made with business case and establishing developer partners, therefore resulting in a strong deliverability score. These factors combined indicate that this project should be a short term priority.

Medium and long term priorities

Several projects occupy a similar score in terms of strategic fit: restructuring **the remaining arches along with improvements to the A259, the seafront public realm and Coastal Transport System**. Each of these projects have strong stakeholder support and if implemented, would align with planning objectives for the city. The requirement for more finalised development plans means that these projects returned lower deliverability scores than other priorities on the graph.

5.

Future funding and investment



Introduction

This section considers how the Council can look to fund and finance the seafront investments prioritised in this report, against the context of constrained public finances both locally and nationally.

For the purposes of this report:

- » Funding is the source(s) of income or revenue needed to meet both capital and revenue costs of delivering a project.
- » Financing is how the costs of a project are met as they are incurred. In this sense, financing is the act of providing cash to meet the capital and revenue costs as they become payable.

General funding options

The potential “general” funding options outlined below are not tied to any specific project. They also do not represent a statement of policy by the Council; rather these options represent an assessment of sources that other public authorities have used to fund projects in similar sectors. Following detailed discussion with local and national stakeholders, the Council will work to identify which, if any, of these options could make up part of a package of funding solutions for its vision for the city’s

Grant funding

A number of potential national funding sources exist to support the renewal and upgrade of Brighton’s seafront, including the Local Growth Fund, the Coastal Communities Fund, National Lottery funds.

Grant funding	Summary and potential offer	Target/area	Timescales to consider	Appropriate priority project
Growth Deals	<p>The local growth fund is allocated through Local Growth Deals agreed between the Government and individual LEPs.⁴⁹</p> <p>The DfT has also established a £475 million Large Local Major Transport Fund, administered via LEPs.</p> <p>Local Growth Deal Round 3 is under development, with decisions expected to be announced by the end of 2016.</p>	<p>The Growth Deal will focus on three key priority areas as identified in the Coast to Capital LEP’s Strategic Economic Plan:</p> <ul style="list-style-type: none"> » Enhance business support and skills » Accelerate research and innovation » Invest in transport, flood defences and resilience 	Funding for local growth fund round 3 will cover 2017 – 2020.	<p>Brighton and Hove Waterfront: the Council has made an application to Coast to Capital LEP for funding to subsidise the capital costs of the Black Rock Conference Centre and Arena.</p> <p>A Coastal Transport System may be suitable for Local Transport Majors funding.</p>
DfT capital integrated transport and maintenance funding	<p>All local authorities receive grant funding from DfT, calculated on a formula basis, to support maintenance of highway assets and invest in integrated transport priorities.</p> <p>This funding is being significantly reduced over the current spending review cycle.</p>	The Council generally allocates such funds to transport projects.	2016 - 2020	Potentially a Coastal Transport System.

Grant funding	Summary and potential offer	Target/area	Timescales to consider	Appropriate priority project
Coastal communities fund	The Big Lottery Fund is delivering the coastal communities fund on behalf of the Government with at least £90 million of new funding confirmed for the next round.	The coastal communities fund aims to encourage the economic development of UK coastal communities by awarding funding to create sustainable economic growth and jobs.	Portions of this fund are set aside for development up to 2021 The next round of funding will be available from 2017/18 through to 2020/21.	Madeira Drive and Terraces. The Arches / A259. Saltdean Lido.
National Lottery funds	The Big Lottery Fund is responsible for distributing 40% of all the money raised for good causes by the National Lottery. In the 2014 - 15 financial year, the organisation awarded more than £1 billion to projects with a social mission.	The objectives of each fund differ but each fund is designed to support community and/or charitable projects across the UK and Ireland.	Timescales differ by relevant fund and are ongoing.	Madeira Drive and Terraces seafront structures which are fit for purpose and safe for use. Public realm for increased accessibility.
Flooding and coastal erosion risk management funding	Central Government, via DCLG and the Environment Agency provides grant funding to local authorities for flood defences.	Funding is targeted on preventing flooding and coastal erosion.	2016 - 2020	Shoreham Harbour developments, following adoption of the JAAP in 2016.

Grant funding: pros - The Council has successfully applied for these funding sources in the past, and will continue to do so as its plans develop.

Grant funding: cons - Increasingly, national funders are looking to use their funding sources to influence local authority behaviour, to provide assistance through financial instruments, such as loans or guarantees, rather than as grants, and to seek match funding raised through local sources. In addition, at the national level, austerity programmes leave less funding available through these sources than has historically been the

case. It is likely that national support will remain an important element of the funding mix, however, other options, including those discussed in this document, will need to be considered also.

In previous years Structural and Investment Funds (ESIF) have been available, however given the uncertainty of Great Britain's relationship with the EU following the June 2016 EU Referendum this has not been considered a viable option for infrastructure investment going forward.



Developer contributions

Local authorities receive payments from developers to provide for essential infrastructure and mitigate the wider impacts of new development. The two main types are Section 106 agreements and the Community Infrastructure Levy (CIL).

Section 106 agreements are legal agreements between (based on that section of The 1990 Town and Country Planning Act) local authorities and developers and can be attached to a planning permission to make development acceptable. Section 106 agreements have helped to provide local infrastructure across Brighton and Hove over the last 25 years, including transport and schools.

The CIL was introduced by the government in 2010. The levy is a local charge that local authorities can choose to apply on new developments in their area to fund infrastructure. Currently there is no timetable for the Council to introduce the CIL.

Developer contributions: pros - Section 106 agreements are a well-established approach and deal with direct impacts.

Developer contributions: cons - There is now a pooling restriction on section 106 contributions and section 106 is only triggered for certain types of thresholds of development.



Crowd funding

Crowd funding is the practice of funding a project or venture by raising monetary contributions from a large number of people, today often performed via internet-mediated registries. Crowd funding is a form of alternative funding, particularly to support projects or initiatives which have strong public stakeholder support but may fall outside of the remit of traditional funding streams such as public grants or local authority planning objectives.

Crowd funding: pros - Crowd funding is an established way of raising non-conventional funding for projects, particularly those that lack obvious alternative funding sources.

Crowd funding: cons - Crowd funding revenues are highly uncertain.



Commercial revenues

Brighton & Hove's seafront assets generate significant commercial income, for example from tenant rents in the arches and anticipated income from the i360. The Council also receives significant income from on-street parking and owns a number of off-street car parks, although reinvestment of surplus parking income is governed by legislation that limits flexibility.

Commercial revenues: pros - Commercial revenues are an established funding source for Brighton & Hove's seafront and are well suited to the nature of the city's economy.

Commercial revenues: cons - Balance is needed between realising commercial revenues and ensuring the seafront remains open and accessible to all regardless of income.





Local taxation

The Council's primary local taxation sources are Council Tax, paid by every household in the city based on housing values, and National Non-Domestic Rates (NNDR) (commonly known as "business rates"), paid by businesses and other occupiers of non-domestic property in the city. The Council retains all Council Tax receipts and, since 2013, a proportion of NNDR receipts.

In other cities around the UK and further afield, local property taxes have been used to fund civic investments. For example, in London a supplement is placed on Council Tax and NNDR to support the funding of Crossrail. In many US cities, a system called tax increment financing is used whereby forecast growth in local property taxation expected from a major civic project, such as a new transport link or urban realm improvement, is earmarked to fund the upfront costs of funding that investment.

The Council is actively considering the possibility of tax increment financing as a major funding source for Black Rock Arena as part of the Brighton Waterfront project. Under this approach, the Council would borrow against forecast business rates growth at the expanded Churchill Square shopping centre in order to subsidise the construction cost of the arena. This approach has

successfully been used elsewhere in the UK, including to regenerate Buchanan Quarter in Glasgow and for public transport improvements in London. There would be no additional cost to local businesses from this funding model.

A complementary approach to tax increment financing could be through a business rates supplement across the city. In Brighton & Hove, Mott MacDonald has calculated preliminary estimates that a two per cent supplement on NNDR across the city could raise around £2 million per annum. If sustained over a 25 year period (as with Crossrail), this amount could finance investment of around £35 million. Under the Business Rate Supplements Act 2009, any move to introduce a business rates supplement by the Council would need to be approved by a referendum of Brighton and Hove businesses. The council has no current plans to implement a business rate supplement in the city.

A similar funding source is the "Business Improvement Districts" concept. This is a scheme where local businesses agree to supplement their NNDR for a time limited period in a designated area to fund local improvements within that area, such as to the public realm. In Brighton & Hove, a Business Improvement District already exists in the city centre comprising over 500 businesses (also known as "Brilliant Brighton").

On March 31st 2016,⁵⁰ these businesses were asked to vote on a new business plan which included a proposal for a business rates increase equivalent to 1.25% of a property's rateable value to deliver projects in the business plan such as: city centre ambassadors and city centre festive lighting displays. The outcome of this consultation will help to indicate appetite for a similar policy for the seafront.

Local taxation: pros - This option has been proven to work in cities around the world. For a city such as Brighton & Hove, with high land prices and a vibrant local economy, it offers a potential solution to help to fund Brighton's seafront infrastructure needs as investment will, in turn, benefit local businesses and residents. The success of the tax increment financing model elsewhere is predicated on a virtuous cycle, where public investment supports and enables economic growth, benefiting local businesses.

Local taxation: cons - As with any tax, charge or levy, consideration will be needed to potential risks of economic distortion. For example, a business rates supplement may encourage some business activity to migrate to adjacent authority areas. However, existing discounts and reliefs for small businesses and some other types of enterprise could continue under this approach, to help to mitigate potential economic distortion.

Other local interventions that have been considered



Congestion charging and related policies

A number of cities around the world use a form of congestion charging in order to improve traffic flows while raising revenue that can be used to invest in local transport improvements and other public works. In the UK, London is the most prominent example of this, having introduced a cordon-based congestion charge in 2003 whereby drivers are charged for travelling inside of the city's inner ring road during working hours. Other examples internationally include Stockholm and Singapore. Other jurisdictions use proxy levies in order to encourage modal shift while raising needed income. For example, Nottingham operates a workplace parking levy under which businesses are charged for providing parking spaces for their employees and a number of Australian cities apply a heavy surcharge to all parking (public or private) in central areas during weekdays. The Council has no plans to implement congestion charging or any related measures at this stage.

Congestion charge pros: This option has been proven to work around the world and achieves a number of benefits. Once implemented, there is evidence that initial community opposition reduces once local benefits – such as reduced congestion and better public transport – are experienced.

Congestion charge cons: Congestion charging can be expensive to administer, reducing public benefits and acceptability. These are limited examples of “resort” cities with a local economy heavily focused on the visitor economy introducing congestion charging, meaning that these measures may be less suited to a city such as Brighton & Hove – for example, local congestion in Brighton & Hove is most acute in summer weekends not weekdays.

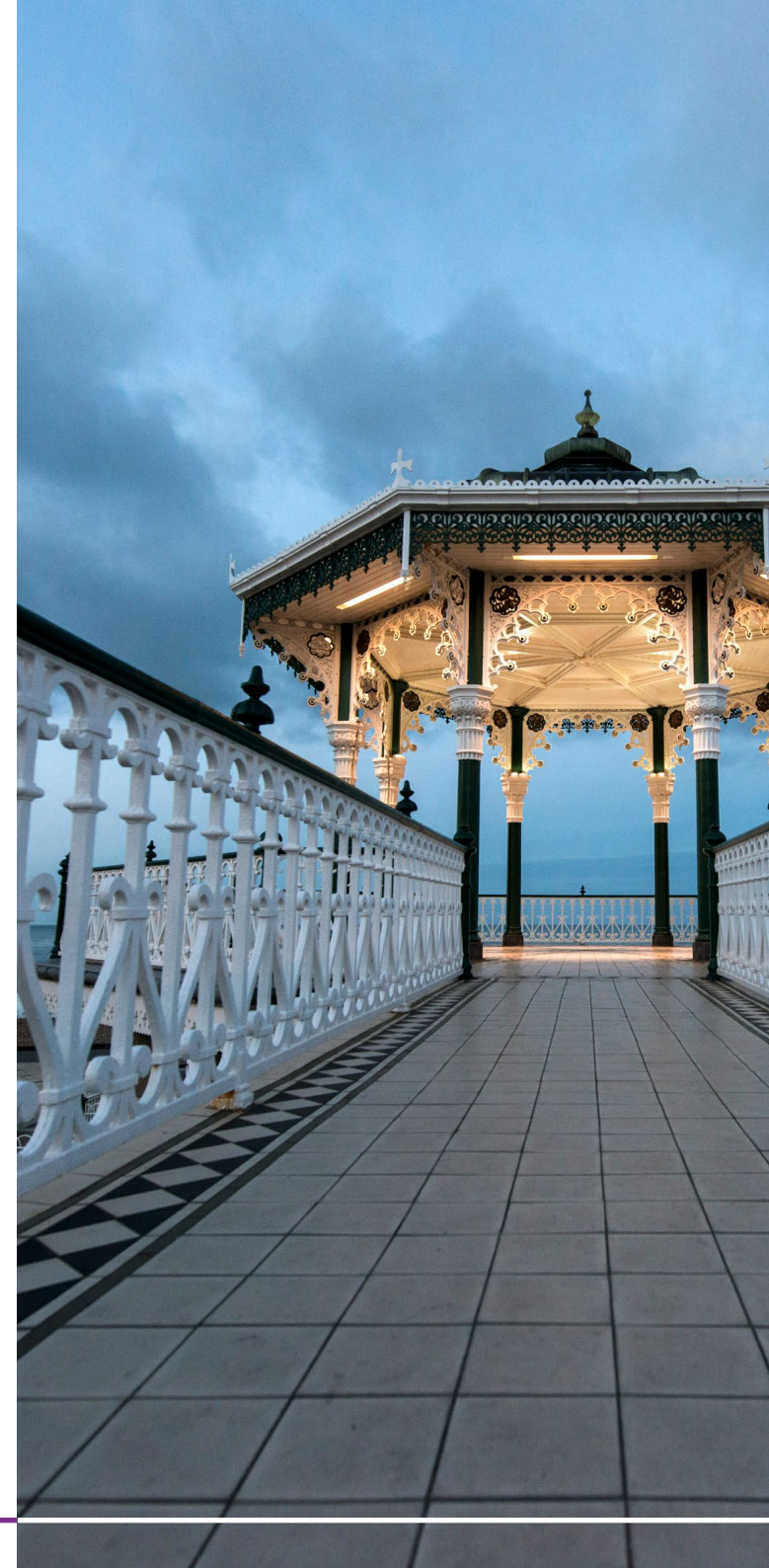


Tourist levy

Many cities around the world, including Paris and Rome, operate a tourist levy on overnight visitors, generally in the form of a per person surcharge to hotel and other accommodation billings. This option helps ensure that tourists to a city meet the costs of providing its tourist infrastructure. While tourists clearly make a significant contribution already to Brighton & Hove, through their spending in local shops and restaurants, many of the city's attractions are provided without cost – including its clean and safe beaches and parks and its unique Victorian seafront heritage.

Based on five million visitor nights per annum in the City (2014)⁵¹ Mott MacDonald estimates that a £1 per visitor night tourist levy could raise £5 million per annum, which could finance around £90 million of investment. This option has been proven to work in cities around the world. For a city such as Brighton & Hove, with one of the UK's leading visitor economies, it is likely to raise significant funding. The levy can be justified from the benefits that tourists receive from Brighton's seafront infrastructure and wider public realm.

However, the Council has discounted the tourist levy as an option at this stage, noting the requirement for primary legislation and potential impacts on Brighton's visitor economy. This option is considered to only be viable in the context of a UK government policy to introduce a tourist levy or equivalent charge nationwide.





Site specific funding options

This section considers how the priorities identified in section 3 could self-generate funding through commercial revenues and other sources.

333



Madeira Drive and Terraces

This extensive estate covering the terraces and Madeira Drive covers a distance of around two miles. It has significant potential for regeneration and resulting commercial revenues – as has already happened, for example, at the Yellowwave Beach Sports Facility on the beach-side of Madeira Drive and former Peter Pan site, the upcoming Sea Lanes project. Through the Brighton Madeira Drive Regeneration Framework, the Council is currently considering further opportunities to redevelop this estate, including Madeira Terraces.

In June 2016, the Council submitted an application for funding through the Coastal Communities Fund to regenerate the Madeira Terraces. The proposal estimates the cost of rebuilding the Madeira Terraces to require £4m from coastal communities fund with the remaining figures coming from rental and other commercial income, and funding from the Council.

The initial proposal is for a mixture of sympathetic retail, office, entertainment and accommodation uses to be developed within the terraces, with development to be organic and phased. These uses could potentially include:

- » Cafes and restaurants, with a signature facility planned for the Madeira tea rooms.
- » Boutique retail.
- » A youth hostel.
- » An arts centre and gallery space, an area where Brighton has traditionally been underserved.
- » Incubator space for creative and digital industry.

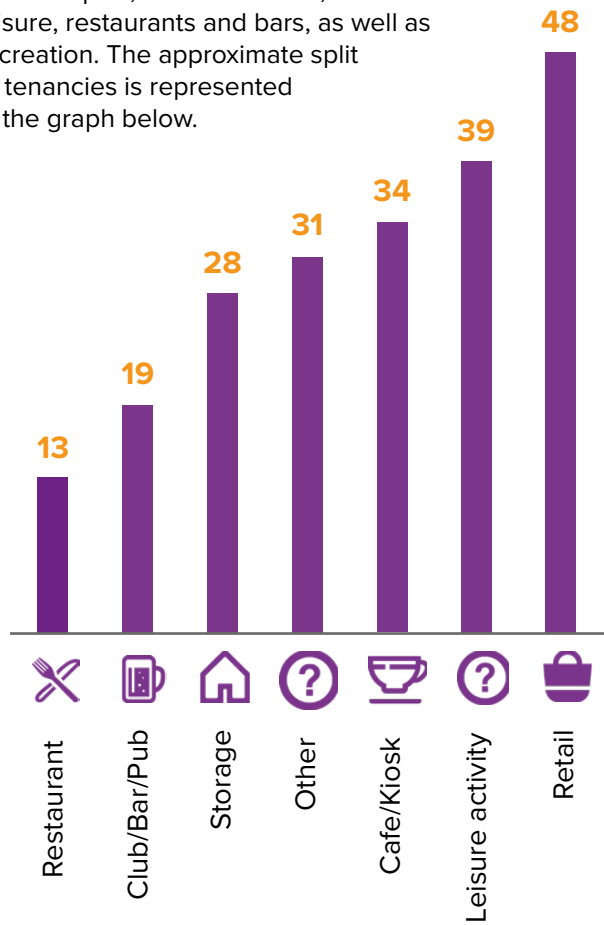
These proposed developments seek to enhance the seafront offering for visitors and locals alike rather than duplicate commercial uses elsewhere around the Brighton & Hove seafront, such as in the arches west of Brighton Palace Pier.



Seafront arches and supporting the A259

Brighton & Hove's seafront arches are already occupied by a variety of tenants and present an eclectic offering to visitors and residents alike. These tenants provide a current annual rental income of over £1.5m to the Council.⁵² Currently, the seafront traders occupy the length of the arches loosely by 'zone', such as sport, outdoor leisure, commercial leisure, restaurants and bars, as well as recreation. The approximate split of tenancies is represented in the graph below.

334



Source: Brighton and Hove City Council (2015) Rent review spreadsheet

There may be opportunities to optimise this rental income over the longer-term by the Council, as landlord, taking a more active role in the stewardship of these important assets, as has happened in London's Great Estates. Currently, stewardship over the seafront arches follows a diversity-driven model, to ensure that the visitor offer covers an extensive offering from retail and bars/restaurants through to seafront activities and leisure opportunities, as well as artist's workshops and boutique tourism offerings.

The stewardship role suggested in this plan would seek to move the focus from that of maintaining diversity in the traders along the seafront to commercial yield in terms of rental income and business rates. For example, the Howard de Waldon Estate has actively managed Marylebone High Street over the last 25 years to encourage a tenant mix that is both diverse (foregoing mass market high street chain stores) and, over the long-term, high yielding.

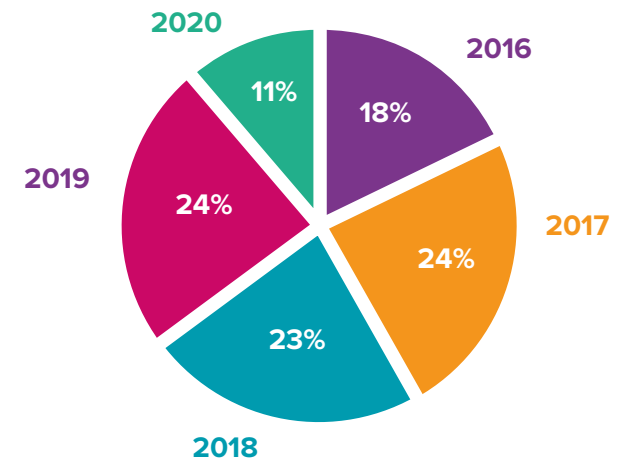
Similarly, the trustees of Borough Market in London have worked to retain the uniqueness of London's oldest market while ensuring an eclectic tenant mix that generates sufficient funding to support the maintenance and renewal of this facility. Brighton & Hove City Council, as the long term asset owner, is able to take a similar long-term view with the seafront arches.

Increased rental income could be ring-fenced to support the upkeep and regeneration of these important assets. Such a suggestion is one of the outcomes of the 2014 the Council Overview and Scrutiny Panel report.⁵³ Following a review of the commercial property along the seafront, over the

next two years there will be a review of leases totalling £530,000; a prime opportunity to revisit this rental income stream for the Council. A series of recommendations for the future development of the seafront arches are covered in Appendix B.

Any changes to the Council's approach to managing these assets would need to take account of the needs of existing tenants, as well as the public desire to maintain the arches' unique diversity. Engagement with traders will be critical.

Properties with rent review



Source: Brighton and Hove City Council (2015) Rent review spreadsheet



Transport solutions

Transport accessibility and movement of people along the seafront should be considered comprehensively, rather than on a project by project basis, and this impacts on the way in which such infrastructure is funded. There are some general options for funding which the Council could direct towards funding transport solutions as well as some more specific considerations for the Coastal Transport System and improved accessibility via public realm and legibility improvements.



General solutions

The Council has identified several potential sources of funding available which could be used for re-investment in transport infrastructure, and therefore considered as part of this work.

These are:

- » Reinvestment of surplus income generated by parking income from fees; as a mechanism for altering commercial revenues. Reinvestment of surplus parking income is governed by specific legislation making flexibility very limited to such things as subsidising bus fares/supporting non-profitable bus services or highway maintenance.
- » Workplace Parking Levy; under the Transport Act 2000, local traffic authorities in England and Wales, outside London, may introduce a WPL to help tackle congestion in towns and cities. The net proceeds can be reinvested in line with the financial provisions of the Act. Workplace Parking Levy, other than in Nottingham is extremely limited in the UK as it has forced businesses to relocate away from the city centre.
- » Road user/congestion charging; can help with managing congestion and net revenue raised can be used to fund road improvement. Road user/congestion charging has been fiercely resisted politically nationally and locally, only in London has it been introduced successfully albeit with significant upfront investment.



Coastal Transport System

This scheme is put forward as a bus service, however this has not been finalised. The preferred funding solution for this investment would depend on the nature of the project itself. For example, the high upfront capital costs associated with a public transport scheme would imply a very different solution to the ongoing operating costs inherent in new bus services. Potential funding options for urban transport systems have tended to focus on a combination of **fare box revenue** and “value capture” from local property owners, whose properties generally benefit from increased accessibility and connectivity. In this context, the **local property taxes** described above are an obvious way of capturing such value, although central Government would also benefit from higher stamp duty revenues in the area through which the transport system passes. It should be acknowledged that given the current uncertain economic climate, there may be reservations from local businesses in advance of raising taxes.



City/seafront-wide public realm and connectivity/wayfinding review

The full extent of public realm requirements is currently unknown, and relies on the outcome of a full review of accessibility and pedestrian environment needs. In general however, where public realm improvements are linked to key projects these initiatives could be incorporated into wider project costs through **developer contributions**. This approach is intended with the Madeira Terraces developments which would benefit from improved pedestrian access along the eastern seafront.

In addition to street furniture and urban realm, further improvements to accessibility can be made through initiatives such as wayfinding and improved signage. The low costs associated with these investments make them well suited to options such as a **Business Improvement District**. Under this approach, which has been successfully trialled in Brighton city centre, local businesses agree to pay a small annual levy to support improvements to the public realm around their area. A Business Improvement District could be similarly introduced to the seafront and immediately surrounding areas.

Such a place making exercise could link to the wider City Urban Design Framework, a programme of works that is to be commissioned by the Council on a city-wide basis. These activities could focus on optimising urban design on the seafront.



Summary of site specific options

Activity	Funding Options	Pros	Cons
Madeira Drive and Terraces	Heritage funding	Site preservation	Funding uncertainty
	Crowd-sourcing	Extend seafront usage; potentially self-funding.	Heritage / environmental impacts
	Local Growth Fund / Coastal Communities Fund		
	Mixed-use / residential redevelopment.		
Seafront arches and supporting the A259	“Stewardship” model	Link to transport benefit	DfT funding being reduced.
	DfT capital maintenance block.	Increase yield while retaining non-high street tenant mix.	Rental income unlikely to cover full funding need.
			Rental income currently used to support wider Council revenue budget.
			Potential impacts on existing tenants.
Transport solutions	Local taxation supplements / growth DfT Local Transport Majors fund	Funding source linked to beneficiaries; established funding model	Only able to progress with local business agreement
	Parking income, Workplace Parking Levy	These funding sources are relatively within the Council’s direct influence	DfT funding being reduced.
	Congestion charging		Would have to divert from other uses
	Developer contributions	Community opposition reduces once local benefits are experienced	Expensive to administer. Limited examples of “resort” cities introducing congestion charging.
	Business Improvement District	Reduces the risks to the Council and ensures development meets transport needs	Only able to progress with local business agreement
	Alignment with the Council’s Urban Design Framework.		Risk of localised economic distortion
		Lead times to negotiate section 106 agreements	



Financing options

As with any major investment, the funding flows identified above often accrue over an extended period. Consideration is therefore needed of how the investment will be financed. Relevant questions for consideration include: risk allocation; cost of capital; and the balance sheet treatment of the investment.

For many of these assets, it is expected that Public Works Loan Board financing will be available and will offer greatest value for money. In some cases this could be supplemented by loans from other public and private financial institutions where this represented value for money.

For projects, such as the renewal of the Madeira Terraces, where the Council is looking to introduce significant private investment, alternative capital structures may be preferable. This could include assets being long-leased to third parties by the Council in exchange for committed investment to renew and upgrade these structures.

Alternative structures for consideration could include trust structures, which would move assets out of direct Council ownership into independent trusts, or commercial structures supported by Council-backed financing. The benefit of these approaches would be to take these assets outside of the fiscal aggregates and hence public sector borrowing constraints that may place restrictions on how these assets finance their investment requirements. These approaches may also encourage more innovative approaches to project delivery and operations.

Roadmap

The seafront is seeing considerable investment action over the coming five years. Continuing this speed of activity is crucial to maintaining the city's position on the global stage and perception as a hub for innovation and investment. The steps below are recommendations for a realistic timeline for development that will see widely supported projects taken forward to address the challenges to the seafront and establish Brighton & Hove as an accessible centre for development, which can be enjoyed by visitors and residents year round. Please see table overleaf.

Key:

- Green - already undertaken
- Orange - currently underway
- Purple dot - required
- Date - expected completion date
- N/A - Not applicable

Activities	Project description and rationale	Next steps										
		Transport solutions required for progress	Initial business case	Initial stakeholder consultation	Public consultation activities	Master planning activities	Business case	Agree funding package	Apply for funding	Development agreement	Planning application	Begin construction
King Alfred Leisure Centre	Redevelopment of the existing site, which includes a modern sports centre and residential properties, is a key priority for the Council.	●			●				N/A		2017	2018
Brighton Waterfront	A major new multi-use event and conferencing venue on the currently vacant Black Rock site adjacent to the Marina, and the extension of the Churchill Square shopping centre onto the existing Brighton Centre site. Transport and access to and from the Black Rock site is currently limited, and this is critical to the waterfront's deliverability.	●			●	●		●	N/A	●	●	●
Madeira Terraces	Commercial redevelopment of the Terraces to help fund regeneration of the city's iconic heritage infrastructure. This project is the cornerstone of the Council's Madeira Drive Regeneration Project.	●			N/A	●	●	●		●	●	●
The arches / A259	There is not currently a plan in place for redevelopment of the arches that run eastwards from the i360 to the Brighton Palace Pier and support the A259. The stewardship model should be optimised and conditions should be created to support commercial enterprise.	N/A	●	●	N/A	●	●	●	●	●	●	●

338



In addition to the roadmap of activities above, the following priorities and recommendations have been made for next steps for the Council:

Alongside project specific actions, the Council needs to follow a structured implementation plan which incorporates the following:

- » ongoing public and stakeholder engagement
- » phased development
- » clear implementation plan which ensures construction impacts are minimised



A comprehensive transport solution

Improved accessibility to and along the seafront has been a recurring theme throughout this investment plan. There are a number of key projects which rely on transport solutions in order to unlock development. To optimise success improvements to seafront accessibility require a comprehensive approach which considers each transport mode, as well as various demands from different users of the space along the seafront.



Coastal Transport System

Accessibility along the length of the seafront is not currently optimised. An integrated seafront transport solution is required to realise the full benefits of the assets of the seafront. The Council has plans to progress with this scheme as included in the approved City Plan Part 1. Going forward, it has been recognised that the Strategic Development Board should undertake a holistic approach to transport infrastructure to ensure these assets are fully aligned and optimised.

the stretch of the seafront. This study would also identify areas which would benefit from sustainable transport (walkways/cycleways) investment. A more comprehensive 'wayfinding exercise' that highlights the various attractions along the seafront has also been highlighted as a key method to optimise visitor foot traffic throughout the seafront. Such an exercise requires input from all seafront stakeholders; traders, hoteliers, retailers and representatives from key sites.



Public realm

Recently the Council undertook a review of routes, crossings, barriers, connectivity and activity which identifies the priority areas for investment along the eastern seafront. This exercise was an important first step to identify accessibility problem areas, however it is recommended that a similar study or Pedestrian Environment Review System (PERS) audit should be undertaken in order to fully understand where public realm improvements could be implemented along



Parking and traffic management

Whilst parking is managed at a local level the Council would benefit from undertaking a review of all parking units and assets along the seafront in order to fully optimise these tools. The Council is committed to exploring all the opportunities and benefits that current and future technology could provide to help managing its parking on the seafront in the most efficient, effective and customer-friendly way.



Madeira Drive Regeneration Framework

The need for more non-seasonal, accessible and commercial infrastructure and development east of Brighton Palace Pier to extend the usage of the seafront is clear from the activities undertaken in this document. In order to progress this, the Council should maintain momentum with schemes such as the Eastern Seafront Regeneration scheme which will boost key developments such as Madeira Terraces and the Waterfront project.

It is also important to reflect the needs and interests of parties both sides of the A259; the recently established seafront stakeholder group includes stakeholders from the seafront vendors, seafront hoteliers and representatives from key development project. It is important to keep up the management of this seafront stakeholder group.



Property portfolio review

As identified in the funding options chapter, revisiting the way in which the seafront arches are managed provides a potential increase in revenue to the Council. Findings from the property review indicate that the property portfolio provides upcoming opportunities around rental review. The majority of rent reviews by total of properties are due by 2018 (63%), and half by the end of 2016.

The priority action for this initiative is to undertake more in-depth analysis of rent yield per square metre by type and usage; something that is not currently undertaken. It will be crucial to maintain the diversity of the seafront vendor offer whilst optimising the revenue from this asset in order to support sustainability of the seafront going forward. More recommendations and findings from the property review are included in the appendices.

Appendices

Appendix A – Activities undertaken by Mott MacDonald and Grant Thornton

Activity	Summary
	The study team undertook a desk-based review of existing plans, strategies, and planning documents of each of the planned projects identified by the client.
<p style="text-align: center;"><i>Telephone interviews</i></p> <p style="text-align: center;"><i>Online survey</i></p> <p style="text-align: center;"><i>Workshop</i></p>	<p>Key stakeholders identified by the Council in terms of project officers, seafront visitor economy stakeholders and representatives from the Council were spoken to via telephone interview. A topic guide was agreed with the Council to understand the strengths, weaknesses, threat, opportunities, perceived gaps and future priorities for infrastructure along the seafront.</p> <p>An additional topic guide was also set up to capture project specific information from project officers at the Council.</p> <p>An online survey was designed, based on the key infrastructure sectors emerging from the evidence review, to be distributed to all vendors within the seafront arches inviting them to share their views on priorities for investment in infrastructure along the seafront. The survey was agreed with the client and went live for three weeks between 15th September and 6th October 2015. It was distributed to 109 email addresses and 23 hard copies were sent out with a freepost return envelope enclosed to those vendors without a recorded email address.</p> <p>A total of 26 responses were recorded (around 20% response rate).</p> <p>On 4th April 2016 Mott MacDonald and the Council hosted an interactive engagement workshop to feedback on the work and findings of the project to date, to key stakeholders both internal and external to the Council. Over 20 guests attended the event.</p>
SWOT analysis	Aspects of the seafront's infrastructure were assessed and split into strengths, weaknesses, opportunities and threats resulting from the evidence review and engagement with key stakeholders.
Commercial Property Review	In November 2015 Quantity Surveyor staff from Mott MacDonald undertook a Commercial Property review of the 300 retail and activity units housed within the seafront arches. A site visit was undertaken to assess the units and collect relevant information the Council holds on these units. Findings and recommendations are summarised in Appendix B.
Economic impact analysis	Where projects identified are currently without a business case for development of land, Mott MacDonald utilised their Transparent Economic Assessment Model (TEAM) at a high level to understand the potential economic impact in terms of jobs facilitated and GVA contributed at comparable sites. The model applies best practice and government supported benchmarks in terms of land use, job density, and local salary information to estimate potential economic impacts supported at comparable development sites.
Funding options analysis	Over the period of December 2015 to April 2016 Mott MacDonald and Grant Thornton undertook in-depth interviews with project officers for those projects where a business case and funding package have not been clarified, to understand potential funding mechanisms that could be considered for each investment option going forward.

Appendix B – Recommendations for the seafront arches

A SWOT analysis of the seafront arches as a commercial property unit was undertaken and the key findings are summarised here:

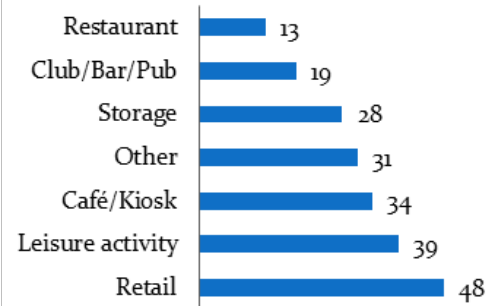
<p>Strengths</p> <p>Circa 212 units located on the Brighton Seafront</p> <p>Current annual rent of £1.505m</p> <p>Assuming the conditions under which the property portfolio were reviewed in October 2015 continue for the following year, a total of £252k annual rent is predicted to come up for review in 2016 (a total of 21 properties).</p>	<p>Weaknesses</p> <p>The largest number of units are for retail usage (48) which also have one of the lowest rental incomes.</p> <p>Average rental income from a retail unit totals £5,224 which is only slightly above storage at £2,351.</p>
<p>Opportunities</p> <p>The majority of properties have a rent review in 2018, however in terms of rental income 2016 is the year where the majority of the rental income will be reviewed, this provides an opportunity to maximise rental potential for 21 properties in 2016 in the short term.</p> <p>Largest incomes are from club, pubs and bars, there is also an opportunity to review the usage in 2016 of these 21 properties.</p> <p>There are a number of closed units/spaces which could be utilised.</p>	<p>Threats</p> <p>There is a threat that the units that are closed remain empty and will not bring in an additional income.</p>

Total Portfolio Review

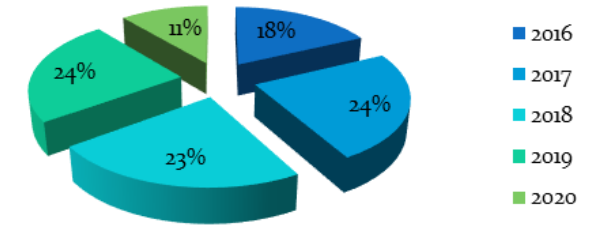
There are a total of 212 properties/units with a number of different usages, the majority of units are for retail use (48 units), please see 'Unit Usage Totals' graph below.

The majority of rent reviews by total of properties are due in 2018 (63%), however half of all total income will have been reviewed or changed by the end of 2016.

Unit Usage Totals



Properties with Rent Review



Initial Recommendations:

1. The Council is recommended to review the property data for the Seafront portfolio to address the current shortfalls in data. Principally to gain area information and to compile all missing data. Without such data more in-depth analysis of rent yield/sqm cannot be undertaken.
2. There are several high level initiatives that could be implemented to improve the return of the portfolio. These are listed below, but these need to be considered in the wider context and other equally important performance criteria, i.e. diversity of choice and the 'Brighton Effect/Offer';
3. Increase the number of higher yielding uses, including Club/Bar/Pub, Restaurant and Café.
4. Alternatively, increase the number of higher yielding uses, including Club/Bar/Pub, Restaurant and Café in the prime locations, between the two piers, and around the i360.
5. Increase the number of anchor tenants / major brands.
6. Revise and standardise lease review terms to enhance security of income.

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