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REGENSEA SWOT analysis and development perspective

Final draft report

On request of:
Province of West Flanders
(on behalf of REGENSEA partner regions)

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Summary

The REGENSEA SWOT analysis and development perspective consists of four themes:

A REGENSEA project
B Social economic analysis
C SWOT analysis
D REGENSEA development perspective

A REGENSEA project

1 In the last few years, a ***number of developments*** have influenced regional development in the European Union. These include: increasing internationalisation, globalisation and international co-operation between local, regional and national authorities. To anticipate future developments and to stimulate transnational thinking, the member states of the European Union and regional/local governments are currently developing transnational spatial planning policies for a new Europe. The North Western Metropolitan Area (NWMA) is one of the central regions in this new Europe. The Interreg II C program has been launched aiming to develop transnational spatial planning, in order to strengthen the spatial-economic structure, to stimulate the sustainable development of cities, to develop new transport infrastructure and to protect the natural and cultural heritage.

2 The partners in the ***REGENSEA (Regeneration Sea Areas) project*** are the provinces of West Flanders and East Flanders in Belgium, the counties Suffolk and Essex in the UK and the provinces of Zeeland and South Holland in the Netherlands. Although different in character, these areas face similar socio-economic problems and opportunities. They are all peripheral maritime areas and transit zones in terms of the NWMA. Due to their focus primarily on the capital city regions in their own countries, cross-sea relations between these regions are at present rather weak, hence the REGENSEA project. The REGENSEA project aims to change this situation and to stimulate new spatial-economic and socio-economic cross-sea relations. The project intends to study the effect of a 180° turn in the approach to spatial planning throughout the partner regions.

3 The REGENSEA project has four ***main objectives***:

- to re-orient thinking on spatial planning and regeneration by acknowledging the existence and influence of land areas across the North Sea;
- to evaluate current levels of cross-border co-operation between partners;

- to encourage a joint strategic approach to spatial planning and regeneration in the partner regions;
- to promote networking and cross-border co-operation between partners.

4 In relation to the main objectives, the specific objectives of the ***present research project*** are:

- to analyse the strengths, weaknesses, opportunities and threats (SWOT) for the spatial-economic and socio-economic development of all partner regions, in relation to each other;
- based on the SWOT analysis, to develop strategic options and a vision for the partner regions in order to achieve the general objectives of REGENSEA;
- to design an integrated spatial vision for the Southern North Sea area, based on the evaluation and testing of the objectives and vision in the REGENSEA pilot projects and focus groups;
- to develop an action programme for the REGENSEA partners, aiming to implement the partnership.

The present research project has been divided in ***four phases*** (figure 1). Phases one, two and four will be performed by both Buck Consultants International and Segal Quince Wicksteed. The project partners will perform phase three. This research report is the result of phase one and two and has a draft status. After finishing phases three and four, final report will be completed.

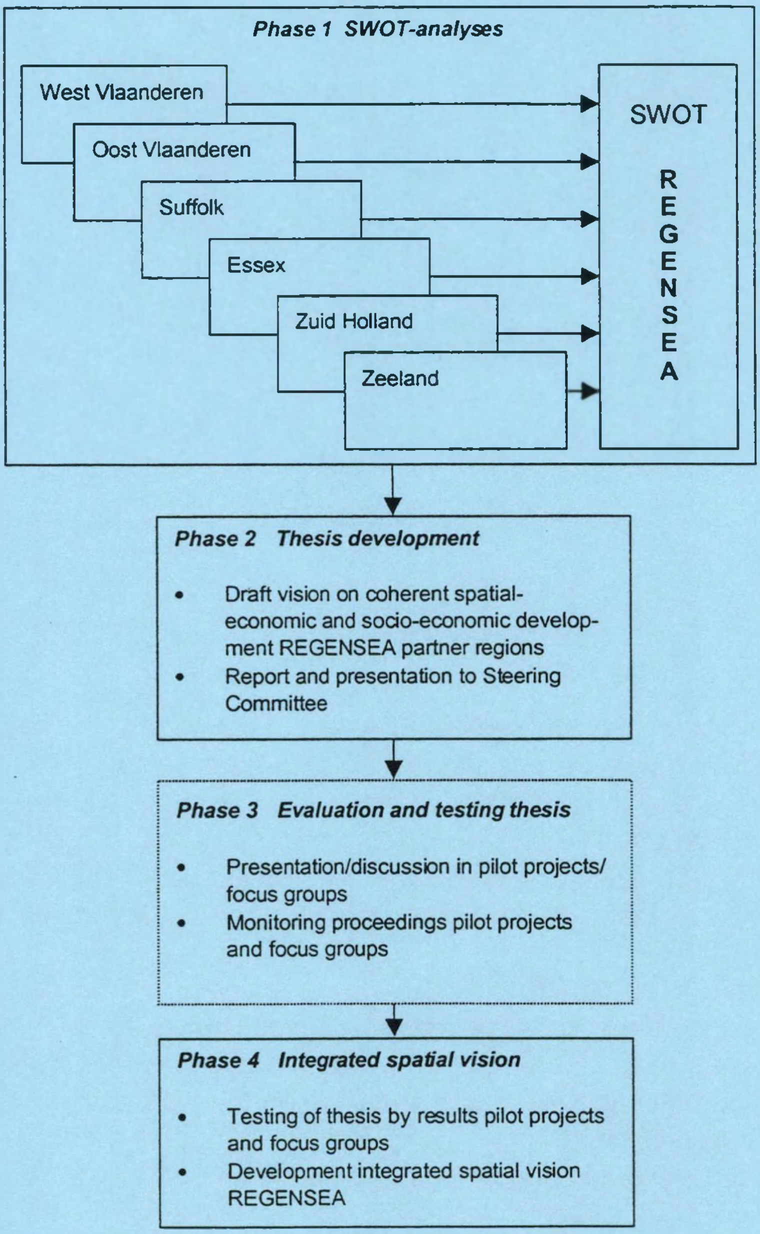
B Social economic analysis

5 The ***social economic analysis*** of the REGENSEA area considers: spatial structure and development perspective, transport and infrastructure, economic development, the labour market, the environment and tourism. The analysis focuses on (a) the characteristics of the regions that are part of the REGENSEA area and (b) on the existing (and lacking) relations between those regions. The current relations between the regions are rather weak. Traditionally there have not been strong links between Essex and Suffolk. Also the links between South Holland and the regions of Zeeland, East and West Flanders are relatively weak. The provinces of Zeeland, East and West Flanders have been co-operating within the Euregion Scheldemond since 1989. This mainly focuses on economic developments.

6 Important ***spatial characteristics*** of the REGENSEA area are the international situation in-between large metropolitan regions (figure 2), the combination of medium-sized urban regions, large open rural areas and the coastal zones, the high quality of living in some areas, the combination of various ‘sea-related’ activities in the coastal regions (seaports and tourism) and the need for regeneration in some areas, like South Essex and the Flemish coast. Each of the sub-regions has primary functional links with nearby metropolitan regions. The North Sea is – from a spatial perspective – a clear barrier to the further integration of the REGENSEA area. On the other hand, the integration of the Dutch and Belgian regions has certainly improved, among other things because of the

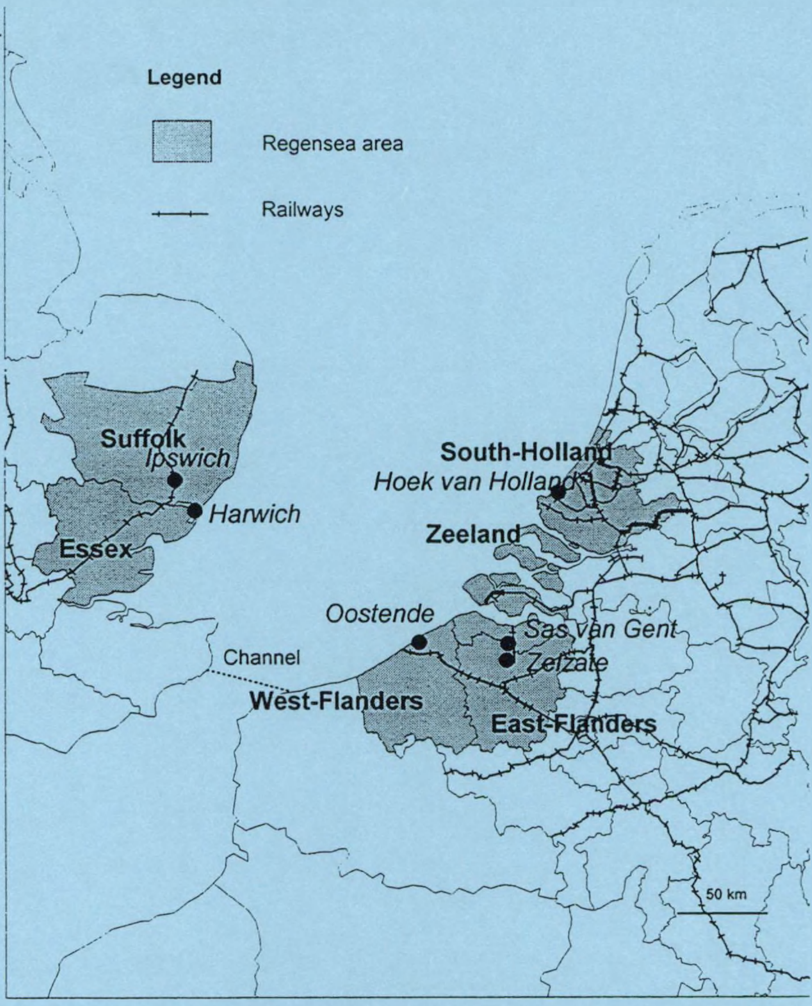
results of the INTERREG I and II programmes for the Euregion Scheldemond. In the main, the spatial planning systems of each of the regions are not attuned to each other. This may be expicable in terms of the spatial structure plans of Belgium and Dutch regions; thsi is an issue that will be dealt with by the Euregion Scheldemond. It is not however due to the spatial development perspectives of the Belgian and Dutch regions on on hand and the spatial development perspective of the UK regions on the other hand.

Figure 1 Research design in diagram form



Note: Phase 3 is not commissioned from BCI/Segal Quince Wicksteed

Figure 2 Metropolitan areas and rail infrastructure in the REGENSEA area



7 Mobility problems within the REGENSEA area show many similarities, cross-border. However (public) ***transport*** policy has not yet been developed. The use of cars is still increasing, especially in rural areas where public transport is less well developed. Also in urban areas car use has increased which leads to congestion and air pollution. The attuning of cross-border and cross-sea public transport connections is not optimal. The railway infrastructure is mainly focused on the metropolitan areas (figure 2).

8 The ***infrastructure*** in the REGENSEA area is mainly characterised by east-west connections. Therefore, the connections with the hinterland are quite well developed in terms of both rail (figure 2) and road (figure 3) infrastructure. However, in considering cross-border co-operation within the area, the north-south connections are less developed. Also the existence of the sea is an obstacle for extensive exchange on both sides of the North Sea. A couple of (important) airports (figure 3), ports and waterways (figure 4) are situated in or close to the REGENSEA area. Both South Holland and West Flanders have ferry connections to Essex and Suffolk (figure 4). Pipelines can be a good alternative for the transportation of products. Within the REGENSEA area there is one pipeline connection for gas between the UK, West Flanders and Zeeland.

Figure 3   Road infrastructure and airports in the REGENSEA area

9 To a large extent, the ***economic structure*** within the REGENSEA area is based on the service sector, with a special role for the tourist industry. Also the agricultural sector plays an important role. There are many small and medium-sized enterprises (SME's) that have a large impact on regional/economic growth figures. Also the seaports have an important impact on the regional economy. The coastal zones have to deal with a structural crisis in the fishing industry that is mainly caused by the fishing quota of the EU and the competition of non EU countries. There is a considerable amount of capacity of business sites within the REGENSEA area (except for the UK regions). However, apart from business sites in Zeeland. The economic development within the REGEN-SEA area is positively influenced by the excellent infrastructural connections to the metropolitan areas in the NWMA.

Figure 4   Ports, waterways and ferries in the REGENSEA area

10 One of the characteristics of the REGENSEA ***labour market*** is the fact that most highly skilled jobs are found in urban areas. In addition, a substantial proportion of highly-educated people living in the REGENSEA area commutes to the surrounding metropolitan regions. There are labour shortages, especially highly educated employers with a technical background. At the same time, some of the port towns face a reduction in low-skilled jobs in traditional industries (port related and manufacturing industry). In 1996 the unemployment rate in the REGENSEA area varied between 5.6% (Zeeland) and 7.6% (South Holland). The REGENSEA area has a good knowledge infrastructure. There are several universities and knowledge centres and there are many polytechnics. However, Zeeland and Suffolk do not have a university. At the moment there is little co-operation between the universities and polytechnics within the REGENSEA area.

11 The ***environmental quality*** in the REGENSEA area is quite high which has a positive effect on the attraction of the REGENSEA area for tourists. There are many beautiful small towns and villages, a large rural area, woods, creek areas and a large coastal zone with dunes and dikes. Water is very important element in the REGENSEA area, linking the regions to each other. The awareness of the environment and nature is get-

ting stronger as sustainable development is receiving more political attention. Despide the relatively high quality of the environment the REGENSEA area also has a lot of environmental problems. The most important problems are the use of some fishing techniques, over-fishing in the North Sea, the pressure on fragile ecosystems from development, coastal erosion, the impact of tourism and recreation on the coastal zones (i.e. waste), pollutions, exploitation of natural resources, a relatively bad quality of the water in the North Sea, overpopulation in the metropolitan areas, the rising sea levels, tidal surges and the changing frequency and severity of storms as a result of the greenhouse effect.

12 The REGENSEA area can be characterised as a very attractive ***tourist destination*** because of the combination of beaches, water recreation, historical towns, large open areas and the vicinity of cities like London, Brussels, Antwerp and Amsterdam. However, the REGENSEA area is not yet seen as one tourist region and there is no co-operation to offer tourist attractions in different countries. There is a strong competition between cities and the coastal zones within and between the provinces and between different businesses. Public transport between (international) tourist attractions is mainly focused on the metropolitan areas.

C SWOT analysis

13 The SWOT analysis for the REGENSEA area has been based on the socio-economic analysis and two workshops in both the UK and the Netherlands[1]. Tables 1 to 6 give an ***overview of the SWOT analysis*** for the spatial structure and planning system, transport and infrastructure, economic structure, labour market, environment and tourism.

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[1] The workshop in Flanders has been canceled by lack of participation.

Table 1 SWOT analysis spatial structure and planning system

Strengths	Weaknesses
• The REGENSEA area has a good position in the Northwest European context. The area is situated between the Randstad, the Flemish Diamond, Greater London, the Lille area and the Ruhr area. • The relatively peripheral position of West Flanders and Zeeland is compensated by the position with reference to important ports like Zeebrugge, Ostend and Zeeland Seaports and the growth pole of Brugge and Kortrijk. • The climate of living and life is considered as attractive, especially in West Flanders and Zeeland. In East Flanders the quality of living is highest in the areas that have been bounded by these two provinces. • The cross-border North-South connections have strongly been improved, among other things by the influence of the INTERREG-program for the Euregion Scheldemond. • The designation of Priority Areas for Economic Regeneration in the Regional Planning Guidance (RPG9), providing a focus for investment in these areas, includes areas around Harwich, Clacton, Harlow, as well as the Thames Gateway. • In general, the coastal zones in the REGENSEA area have a high quality and environmental value. Either as economic centres (ports) or as tourist attractions (beaches and dunes). • The REGENSEA area possesses a strongly developed living and working environment of international significance with Rotterdam, The Hague and the surrounding areas in the southern part of the Randstad.	• Geographically, the REGENSEA area is not considered as an integrated area. The North sea forms a barrier within the area. • The current regional planning guidance in the UK splits Essex and Suffolk into different regions which does not promote co-operation between the two areas. • A general presumption against development in the planning process and lack of flexibility in development control decision making can create difficulties for development projects, especially in areas regarded as important conservation areas. • Lack of effective linkage at regional scale between planning for economic development, land use and infrastructure means that these policies do not always complement each other. • Especially in Zeeland, East and West Flanders is a large amount of rural areas. Therefor the basis for facilities is quite small. • Cities and urban areas dominate the spatial structure in every province. As a result the rural areas suffer of constant pressure of urbanisation. • The larger part of the province of South Holland has a high population pressure. • Especially the Belgium and English regions have become more peripheral areas since the implementation of the Channel Tunnel. • The most important urban areas in the REGENSEA area are hardly focused or not focused at all at the REGENSEA area.

Opportunities	Threats
• As a new European area the REGENSEA area can use its opportunities to change its peripheral image for a new central image in between different metropolitan areas. • Spin-off effects of the surrounding urban areas like the Randstad, the Flemish Diamond and London. • The recent Europeanisation in spatial planning offers perspectives for the development of new European areas. • A decreasing meaning of the border. • A stronger cross-border co-operation can decrease the functional independence and strengthen the functions of urban areas in the REGENSEA area. • The development of network structures at different spatial levels can strengthen the position of the REGENSEA area. • Cross-border co-ordination of town and country planning and the operation of building developments can contribute to prevent more splitting and destroying of the natural environment. • The Suffolk Development Agency (SDA) and the Essex Economic Partnerships (EEP) are committed on sub-regional level to implementing the vision and strategy for developing the counties and to working with other organisations. • Formation of a new regional planning body for East of England which will be operational from April 2001 with pan regional arrangements for 'Greater South East' will provide an opportunity to co-ordinate planning better across former boundaries. • Capacity for further 8,000 homes (including further 4,000 at Chafford Hundred).	• The opportunities of developments in the REGENSEA area have been mainly concentrated on the urban areas. The sparsely populated rural areas are threatened to lack behind. • The qualities of the REGENSEA area can not be communicated (enough) across the regional borders. • The barrier of the country border is still clearly noticeable, for example by the lack of cross-border co-ordination of town and country planning and the operation of building developments. • The fields of power of the adjoining strongly urbanised landscapes and metropoles have a strong influence on the spatial development, like the need for building areas. • Within Europe many new European areas and corridors arise that threatens the opportunity to create the REGENSEA area as a European area. • The development of the REGENSEA area is constrained by water resources. • Suffolk and Essex will have pressure caused by for additional housing developments in areas susceptible to high levels of long-distance commuting • There is only limited investment in transport, which is a threat to sustainable development that in turn may have an impact on road improvement schemes.

Table 2 SWOT analysis transport and infrastructure

Strengths	Weaknesses
• A direct connection to the international HST network in Rotterdam and The Hague. • Stansted is the fastest growing airport in the UK and major expansion of terminal capacity is currently underway. • In the REGENSEA area important ports that are part of the international port network are situated, like Zeebrugge, Ostend, Gent, Waasland, Vlissingen, Terneuzen, Rotterdam, Vlaardingen, Schiedam, Tilbury, Felixstowe and Harwich. • The situation of Rotterdam airport that is used for the transportation of both persons and freight. The last couple of years this airport has strongly developed concerning airplane movements, passengers and freight. • The highway links between the REGENSEA area and the international network. In Flanders the E17 was build to connect Paris to Eindhoven (by Kortrijk, Gent and Antwerp) and the E40 London to the Ruhr area (by way of Calais, Gent, Brussels, Liege en Achen). Two important connections in Zeeland are the Dammenroute (N57) and the Zeelandroute (N59). South Holland has a good highway structure as well, like the connection from The Hague tot North Holland (A4 en A44), from The Hague towards the east of Holland (A12) and from Rotterdam to the south of Holland (A16) en the east of Holland (A15). Suffolk and Essex have good road and rail links to London and the multi modal studies for M11 and A12 should lead to more integrated transport solutions and a clearer link with land-use planning. • The public transport facilities in the urban area are good. Existing train and buss services provide a basis to extend the provision to the more remote rural areas. • Various ferries connect the Flemish and Dutch provinces with the English counties.	• The most important connection between the UK and the continent is situated outside the REGENSEA area (Channel Tunnel), for both the transportation of persons and freight. • Large parts of the REGENSEA area do not have a good connection with the international HST network. • There are no airports for the transportation of persons in East Flanders and Zeeland. In West Flanders (Ostend) charters are offered on a non regularly basis. • The limits of the capacity of the through infrastructure have been mainly reached, especially in East Flanders and South Holland. • Much congestion in the urban areas of the region. • Very poor road links and public transport provision in the remote areas and peripheral areas. • Little transport alternatives (public transport) for cars, especially in the rural areas. There is only one cross-border bus connection between Zeeland and West Flanders, which is from Breskens to Brugge. • The lack of a concept for cross-border public transport and links to main towns. • In Flanders and the Netherlands the highways are mainly orientated in the direction between east and west. There are little connections between north and south. However, the east-west links in the English regions are poor instead of the north-south links, which has led to continued remoteness and inaccessibility of rural communities e.g. relative isolation of north-east Suffolk. • The spatial relations between South Holland and Zeeland are relatively bad. The relation between South Holland and the rest of the Randstad is much stronger. • Infrastructure bottlenecks hinder an optimum use of transport and distribution potential for example tunnel restrictions on the line to Ipswich which constrain use of rail network. • A different policy in accordance to the transportation of cargo, like gas prices and road tax in the REGENSEA area. • Insufficient connections between public transport and the North Sea ferries. • Relatively high costs for the use of ferries and the lack of business orientation of the timetables prevent a good connection between the counties in the UK and the Flemish and Dutch provinces in the REGENSEA-area.

Opportunities	Threats
• The seaports in the REGENSEA area offer many opportunities to profile the region more than they do now and several have existing good links to the Seaports in the area e.g. Tilbury and Felixstowe ports and the motorway network. • There are existing plans to boost the regional infrastructure e.g. Feasibility study for lower Thames crossing. • Co-operation between seaports and airports gives opportunities for the development of a unique multi modal region (water, rail, road, air). • Co-operation between seaports can be developed stronger. • Development opportunities at Stansted and Southend Airport. • The implementation of RandstadRail, free bus lanes and parking places at railway stations should lead to the reduction of car use and therefor less congestion in South Holland. • Improved rail links in the UK, in particular east-west rail links in Suffolk and Essex – if implemented – will improve cross-country communications and enable greater use of rail for freight and passenger traffic. • The Westerschelde Tunnel can provide a good connection to existing road transport and therefore offer more opportunities in the four Flemish and Dutch provinces. According to the fact that north-south connections are getting more important for the economy in the EU and the fact that the Westerschelde Tunnel is connection from north to south, this creates potentials in additions to the present infrastructure. • In the ports of Gent, Ostend, Zeebrugge and Zeeland the VAL concept can mean an extra attraction to new activities. • Port leisure development e.g. in Lowestoft can help encourage tourism. • Cross-border public transport supports cross-border integration (including the connection to the North Sea ferries). • Surplus value by co-operation between logistic nodal points in the REGENSEA area.	• The increase of car ownership and car use leads to an increasing congestion in the REGENSEA area, mainly in East Flanders and South Holland. However, attending the central situation of these provinces on the important north-south connection between the Netherlands and Flanders and the future traffic development as a consequence of the Westerschelde Tunnel, also Zeeland and West Flanders could deal with (the consequences of) congestion problems soon. • Fragmented responsibility and limited funding for public transport in Essex and Suffolk (as in the UK generally) make it very difficult to develop of an integrated public transport network which offers a real alternative to the use of the car (e.g. compare investment in high speed rail in Belgium and Netherlands with UK rail system). • Concerning the opening up the problems of the ports are increasing: – the ports of Gent and Zeeland are mainly importing ports. Therefor many ships return without cargo or have to trade to Antwerp to collect cargo before returning. In the end this can work out negative for competing activities; – the accessibility of the port of Gent has to be improved concerning the competing situation in the future; – the ports of Zeebrugge and Ostend are not opened up enough by inland navigation ways. • Strong competition between the Channel Tunnel and North Sea ferries could threaten the existence of scheduled services in the future. • Links to the ports of Harwich, Felixstowe and Ipswich need to be improved to realise their benefit to the economy. • A limited investment in (public) transport is a threat to sustainable and economic developments.

Table 3 SWOT analysis economic structure

Strengths	Weaknesses
• The REGENSEA regions have an attractive business climate with a stable economic base and some strong sectoral clusters, e.g. tourism and high tech. • Economic relations have been strengthened between the provinces that are part of the Euregion Scheldemond area. • Important positions of the seaports. The port related economic activities have a large impact on the function of the regional economy. • Gent is the second largest industrial area in Flanders and Brugge is also an important economic centre in Belgium. • Especially South Holland is an attractive region for the establishment of foreign companies. The last couple of years the number of new companies decreased, while the number of workplaces increased. It seems that South Holland is able to attract large companies. • In South Holland a couple of technological centres have been established: the brainpark in Rotterdam, the Bio Science Park in Leiden and the Delftechpark in Delft. In Gent there is also a centre of bio-technology. • The Hague and Rotterdam fulfil an important position as office towns. • The central position of the provinces leads to the nearness of important economic centres like the Randstad, the Flemish Diamond, Cambridge and London. • Economic development strategies and partnerships already in place by local government organisations e.g. Essex Economic Partnership • The role of the SME, which account for over 90% of the region's businesses is very important. For example in the Netherlands SMEs have provided a strong growth of the employment the last couple of years. In each area there are also many institutions that support professional activities and networks for the SME. • Within the REGENSEA areas there are pockets of a strong manufacturing base e.g. Haverhill in Suffolk, and south Essex.	• The economic structure in the REGENSEA area has not been integrated; the economic relations between the English regions and the Dutch and Flemish regions are hardly developed. The areas around The Hague and Rotterdam have mainly been orientated at the other part of the Randstad. • The production structure in East Flanders and Zeeland is partially dependent of a number of large companies in sectors that strongly depend on international developments (compared to Suffolk and Essex which have very high numbers of small companies and low manufacturing productivity). • South Holland, West and East Flanders have a shortage of business sites. Especially in South Holland there are relatively few hectares of business sites left. Flanders has plenty hectares of business sites but these hectares cannot be emitted at short term. • The coastal provinces have to deal with the structural crisis in the fishing industry. Important common aspects are the fishing quota of the EU and the competition of non-EU countries, like for example from Eastern Europe. Besides, West Flanders has to deal with the Dutch infiltration, an obsolete navy and a shortage of trained crewmembers. • In South Holland the market sector of the glass house industry decreases by the reconstruction of the Westland, the shortage of space, the congestion and the high land prices. • In South Holland the knowledge economy lags behind compared to the Dutch average growth. The research institutes have an important contribution to the innovation and knowledge orientation, while the businesses slightly lag behind. • The economies of Essex and Suffolk have a relatively low proportion of growth in manufacturing and research and development and a preponderance of low value-added industries such as the dependence on agricultural sector and related industries, e.g. food manufacturing, in rural areas yielding low incomes. • There are areas requiring economic regeneration in coastal Essex and Suffolk. • The REGENSEA area is strongly confronted with the negative economic aspects of the reconstruction processes in the agricultural, because this region consists mainly of rural area.

Opportunities	Threats
• The presence of important seaports offers economic opportunities for the development of a unique multi modal region in the REGENSEA	• Potential impact of loss of large firms, particularly in remoter areas, dependency on larger companies

area.

- Joined marketing and acquisition actions together with the introduction of the new image as the REGENSEA area offers opportunities in the Europe of regions.
- Until now the service sector in all provinces has developed less rapid than the regional or national average Therefor the service sector has a couple of opportunities for growing like in the social profit institutes, but also in tourist and recreation activities (mainly in East Flanders).
- A high export rate in the manufacturing sector as well as the specific knowledge in the export sector can be seen as a location advantage for competition within Europe.
- In the Flemish provinces the expansion of high-tech sectors has special potential growth (the biotechnological park in East Flanders and the Flanders' Language Valley in West Flanders)
- The Cambridge to Ipswich corridor is an important and growing high tech cluster in the UK. This cluster could, if successful, generate substantial benefits to both main centres and also intermediate towns such as Bury St Edmunds and Stowmarket.
- New infrastructure to promote added value industries is currently being developed such as the proposed innovation park/ technology transfer opportunities at BT Research and the university and televersity in development in Suffolk.
- Regeneration proposals for the Thames gateway could stimulate substantial new economic activity in south Essex. Priority areas for regeneration include Lowesoft, Ipswich, Clacton and Southend
- Promotion of growth corridors:
  - A12/Great Easters
  - A13/A127/London-Tilbury-Southend
- The attention for quality and marketing is getting stronger.
- The strengthening of relations between businesses in the UK regions and businesses in the Dutch and Belgium regions.
- Significant development sites (in Suffolk – Bentwaters & Woodbridge; in Essex Tilbury Port and land made available at West Thurrock Power Station)
- Back offices moving from London to Essex/Suffolk (call centre businesses) provide job opportunities
- Both West and East Flanders have to deal with the delocation processes in the direction of border regions with EU subsidies (Henegouwen and North of France).
- The business dynamic of West and East Flanders is limited by various aspects related to spatial planning, like the lack of business sites and the problems of businesses that have not been established at the right business sites.
- The regional economy of Zeeland is more or less dominated by the presence of some large companies. Therefore Zeeland depends too much on these companies, mainly according to the employment.
- At this moment the vegetable and flower auction in South Holland dominates the Dutch market, but this part is decreasing.
- The competition of developing agricultural areas within and outside Europe is increasing, like countries in Eastern Europe or North Africa.
- In South Holland the negative effects of economic reconstruction processes threaten the horticultural sector, a lack of expanding opportunities, high land prices and the competition with other horticultural areas.
- The REGENSEA area is not a part of new European corridors with the exception of Rotterdam and The Hague.
- The regional economy of the REGENSEA area strongly depends on the port related economic activities. Growth and further development of other seaports possibly forms a threat for the regional economy in this area.
- Strength of competing from stronger economic regions such as Eastern region (including Cambridge, Stansted)

Table 4 SWOT analysis labour market

Strengths	Weaknesses
• The working climate is stable and the employees are motivated. There is also a high quality of labour force, partly by the presence of the universities in Delft, Leiden, Rotterdam, Gent, Kortrijk, the European College in Brugge, Colchester and Chelmsford/Cambridge. • The unemployment in all provinces decreased in recent years, especially in the urban regions. In the region of Rotterdam and The Hague the labour market is tight. • The language skills in the REGENSEA area are good, especially for the higher educated inhabitants in the Netherlands and Flanders. • Proximity of major employment centres e.g. London provide job opportunities and readily available potential labour force. • Maritime employment has grown around the ports (e.g. Ipswich).	• There is no (sufficient) university infrastructure in West Flanders, Suffolk and Zeeland. • Because of the lack of a university, Zeeland has to deal with a lack of highly skilled jobs at the labour market. Many highly skilled young persons leave Zeeland. The low level of education degrees of a large part of the potential labour force is one of the most important factors in the employment policy. This is also the problem in East Flanders. The adjustment of education and labour market has been marked as a bottleneck in most Flanders provinces for years. • The part of employment for higher educated people out of the total employment has been concentrated in the urban areas in all provinces and high proportion of the skilled workforce commute from the areas e.g. from Suffolk and Essex to London. • Progress towards the National Targets for workforce qualifications in both Essex and Suffolk is limited and lower than the national average • Employers continue to report skills shortages in the workforce in particular personal, basic and managment skills • According to the opportunities of cross-border employment there are some administrative, law and fiscal obstacles that make it impossible for the regional labour market to function perfectly. • In the REGENSEA area there is no cross-border labour market. So far the Euregion Scheldemond has not developed an euregional labour market. • A shortage of cross-border public transport and the perceived barrier of the North Sea hinder the development of cross-border exchanges on the labour market for example. • Low average earnings • Pockets of high unemployment and deprivation (notably in Harlow, Ipswich, Waveney, Basildon, Clacton, Southend) • Unemployment also linked to declining sectors such as agriculture and fishing

Opportunities	Threats
• In the short/medium term - Support received through national and EU funding mechanisms (Obj.2, INTERREG, ESF, SRB) • A cross-border labour market offers more opportunities for finding a job. • The European Union wants to stimulate the development of the international labour market. • The regional shortage of employment can be partly solved by stimulating a cross-border labour market. • The mutual recognition of diplomas offers opportunities for a cross-border labour market and can contribute to an innovative, future-minded image of polytechnics and university. • The knowledge of different languages of the labour force in Flanders and the Netherlands forms a stimulus for the establishment of businesses. • A specialisation of polytechnics and universities in the field of cross-border phrasings or solving of problems that become more important both within Europe as world-wide. • The development of cross-border co-operation in research and knowledge transfer can increase the competition capacity. • The expansion of co-operation among businesses and between businesses and knowledge centres at different knowledge areas can support the economic development process.	• Speed of technological change will place increased pressure of the workforce, in particular those with long term unemployment difficulties • The decreasing employment in the manufacturing and the agricultural sector and specifically the knock-on effects of Dagenham redundancies. Partly caused by the technologic changes and negative effects of reconstruction in the agricultural sector. • The raising of EU funds and the changes in structural funds. • Ageing of the population that might lead to a tight labour market. • Insufficient harmonisation of the Flemish, Dutch and English educational institutions. • Insufficient feed back between the requirements of employers that is asked for by businesses and the educational institutes. • The continuing boundary at the labour market prevents the Euregion integration of different important sectors. • Shortage of labour and skills in key sectors for example, lower skills levels in Essex may perpetuate economic and social problems.

Table 5 SWOT analysis environment

Strengths	Weaknesses
• The REGENSEA area is characterised by high quality, diverse environment including valuable coastal zones and attractive valuable ecological areas. • The presence, high quality and diversity of ecological and natural areas like the Creek are and the Green Hart. • Air quality is generally good quality / pure • Existing conservation designations for ecological and natural areas of high quality • Dutch ports have good waste collecting services for ships, the so called Haven Ontvangst Installaties (HOI). • The Rijn Schelde Delta is well cleaned by dredging on a regularly basis. • There are no direct drainings from sewer systems anymore. Therefore the quality of sea water and attractiveness of the beaches have been improved. • In the Netherlands meetings are held on a regularly basis between the government and industries. These meetings are basically to inform different parties. • Certain industries have been concentrated in certain regions like the Westland (glass house industry).	• A relatively bad quality of air in urban, industrial areas. • The threatening of the environment that is caused by the sector of agriculture. • Mineral extraction: wide range of minerals brick clay, sand & limestone – needs to be managed • Especially in the UK counties there is a dry climate: Suffolk and Essex are the driest regions in England. • In general the quality of the water in the North Sea is not too good. • Lots of areas suffer of noice pollution by different causes, like manufacturing, airplanes and other vehicles.

Opportunities	Threats
• A cross-border approach of the development of nature and the protection of the environment will lead to better results. • By the development of a new co-operation structure, the REGENSEA project offers unique opportunities for collective management of valuable coastal zones and the North Sea. • The development of international water management for the REGENSEA area. • By a stronger synergy between the economy and the environment the awareness of the environment increases. This can lead to the development of new activities and the extension of existing activities. Indeed the sustainable development concepts have to be considered. • The implementation of environmental healthy production methods. • Increase in participatory conservation holidays • In all regions initiatives have been started to develop new nature. • Stimulating environmentally friendly entrepreneurship. • Another way of financing the collection of waste in ports (HOI) will decrease the fleeing of ships to other ports.	• Development of tourism and economic activities in the coastal areas can lead to the threatening of the nature areas. • There are too many tourists compared to what nature areas can cope with. The number of tourists is still increasing, mainly in a couple of attractive areas, like the coastal and urban areas. This leads to more environment pollution. • Intensive farming activities' negative impact on the countryside, in particular run-off and threat to woodlands • Pressure for development, in particular housing, may detract from quality of environment • Pollution from transport (especially cars), and port industries • Coastal erosion • Aggregate extraction (off shore mining and dredging in the Thames estuary) • Intensive use of the land, for example in the agricultural sector, has a negative influence on the quality of the environment. • The masse overpopulation in the metropolitan areas causes a large demand of space and will increase the pressure of building at the free spatial area, especially in South Holland and nearby the urban areas in other provinces. • The opportunity for an airport in the North Sea.

Table 6 SWOT analysis tourism

Strengths	Weaknesses
• Existence of common tourist attractions throughout the REGENSEA area including coasts, fenland/marshland, historic cities, and cycling. • The market for leisure activities is growing and spare time and spending increase in all provinces. The present museums, attractions, events and coastal area attract many visitors every year. Especially the coastal zones and cities are interesting attractions for tourists. • A strongly developed tourist sector and increase of business tourist sector. In the Netherlands of half of the number of international congresses is held in this South Holland . • Many museums and other tourist attractions like the Kunsthal, the Ahoy, a couple of festival in South Holland and the music festival near Aldburgh • The presence of the beaches and dunes • There are many attractive and quiet rural areas and villages, especially in Zeeland, West and East Flanders, Suffolk and Essex. • Tourists have a lot of choice in accommodation at reasonable cost. • Especially South Holland and Essex have an international accessibility by the presence of the airport. Also cities as Gent and Brugge have a good accessibility by good rail connections to the international network. • International attractive cities in the REGENSEA area and accessibility of major population centres (within 2-3 hours travel). • The rich cultural heritage in Suffolk and parts of Essex, notably the churches and country houses, built in the Middle Ages. • There are plenty of walking and cycling routes in all provinces. • The presence of (fast) ferries and the Channel Tunnel where tourists enter the country. • Low crime rate. • International accessibility through the absence of a language barrier between the regions • Strong US Market for Suffolk and Essex: special historical links associated with founding US and World War II air bases • Horseracing in Newmarket • Existence of the East of England Cultural Consortium • Over 24 million people per annum attracted to regional shopping facilities • The situation along the new waterway in Zeeland. • A great variety within a relatively small area.	• A high pressure on tourist areas like the coastal zone and the cities by a large number of tourists. • Coast related tourism has mainly been situated in valuable nature areas in West Flanders, Zeeland and South Holland. The opportunities for expending are limited. • The UK had a negative international image as being cold, having a lot of rain, being flat and uninteresting. • There are no large, common tourist attractions between the provinces in the REGENSEA area. • Shortage of 4/5 star hotel accommodation • Limited accommodation stock for groups, and away from the coast, for individuals • Public transport away from larger towns is poor • The tourist industry has a limited professionalism. Better and more training for those employed in tourism business is needed. • The REGENSEA area is not seen as one integrated tourist area. • No clear identity and lacks big name destinations or major sports attraction/ amenities • Poor understanding by regional organisations of tourism markets • The limited way of co-operation. • Lack of opportunities to expand caused by the scarcity of land.

Opportunities	Threats
• Cultural and sport events strengthen the cross-border integration and have a positive effect on the reputation of the region to the outside world like the European Football Championships. • Better use of historical features such as stately homes and military forts • The presence of international known and attractive cities in the vicinity, like London, Amsterdam, Brussels, Antwerp and Utrecht. • Especially the increase of the number of short holidays and business tourism stimulate the demand of (cross-border) tourist activities and therefore the creation of jobs. • Scope for growth of short break tourism from rest of UK and near continent • Reduction of costs by co-operations. • International marketing activities for tourist areas by way of established partnerships e.g., with ETB for overseas marketing • Increasing use of IT to research and book holidays • The development of common cross-border and cross-sea tourist arrangements. • Good opportunities for the combination of city trips and coast tourism. • Substantial areas of land in Essex with Thames frontage, accommodating wide range of port and industrial activities some of which is unattractive and does not need the waterside location • Capture more spending from people travelling into/through ports/airports – try and keep visitors from overseas in the region for one day • Some economic activities can be transformed into tourist attractions (like the flower auction).	• The provinces are primarily competing to each other which makes it difficult to co-operate at international marketing for example. • An increasing national and international competition between cities and coastal areas. • The contrast between the attraction of tourists on the one hand and the consequences for nature and environment on the other hand. • Lack of cross-border co-ordination between the various organisations in the industry and between different provinces. • Negative images concerning weather and cost and of part of the areas concerning environment. • Conservation constraints: many popular tourist areas are environmentally sensitive • Negative perception of tourism by some residents. • A short product life cycle of tourist products. • Insufficient relations between large companies and SMEs. • The scaling up of the tourist industry can lead to an unwished uniformity. • Permanent living in tourist parks.

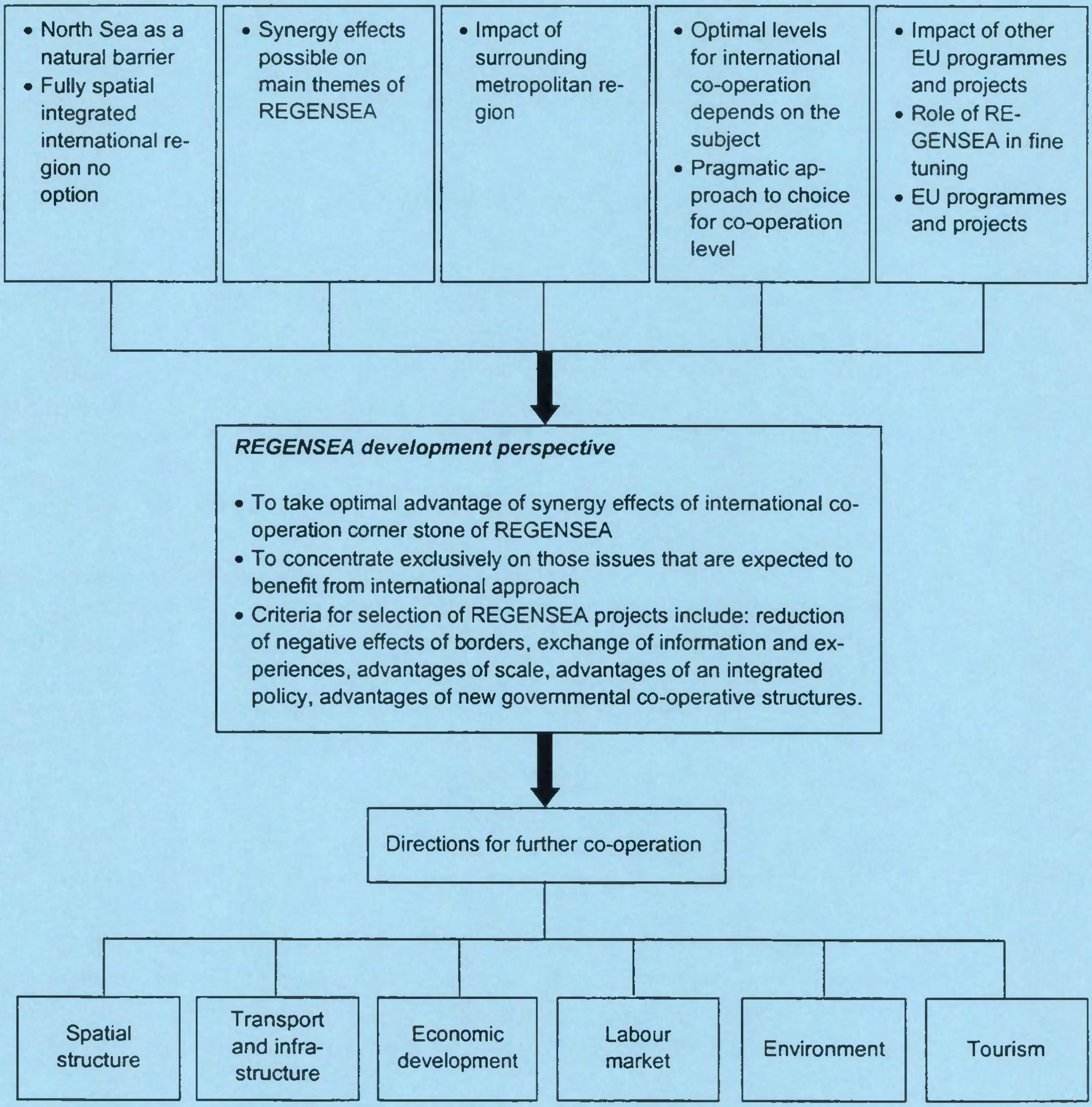
D REGENSEA strategic context

14 In order to develop a single strategic framework, REGENSEA must select those issues that can be expected to benefit from a joined international approach. In order to draw a stategic perspective on the REGENSEA area, five ***starting points*** are formulated:

- The character of the REGENSEA area. Due to the North Sea as a natural barrier, spatial-economic and socio-economic relations are at present rather weak. Since the North Sea will stay a natural barrier. The development of the REGENSEA area as a fully integrated international is not therefore an option. Instead, the objective of REGENSEA is to focus on and emphasise the issues and themes within the REGENSEA area that can benefit from a joined approach;
- Synergy effects as a result of co-operation within the REGENSEA area. Five main reasons can be identified for co-operation: reduction of the negative effects of both natural and institutional obstacles, exchange of information and experiences, advantages of scale, integrated policy for various themes with an international scope and governmental structures;
- Relations to the surrounding metropolitan areas. The REGENSEA area should not be seen as single region. The five surrounding metropolitan areas have many inhabitants that form a broad basis for social and economic activities. The relations with these metropolitan areas are important and can be seen as essential preconditions. However, the focus of REGENSEA is not external relationships but a strengthening of internal relationships;
- Optimal level for international co-operations. It is possible that the level of the REGENSEA area is not always the optimal level for international co-operation. Whenever possible, the optimum level of co-operation should be pursued. In other situations, pragmatism should suffice. Co-operation at the REGENSEA level can sometimes be effective and therefore should be used. However, it is very important to attune the co-operation with other Euregions like the Euregion Scheldemond;
- Relations to other EU programs and projects. The REGENSEA area is part of the NWMA. Within the NWMA a number of European funded Interreg projects are carried out that have a direct or indirect effect on the REGENSEA area. The REGENSEA project can contribute to the fine-tuning of this program and the projects.

Based on the starting points, figure 5 describes our strategic perspectives.

Figure 5 REGENSEA strategic context



15 The elements of further co-operation are based on the social-economic analysis and the SWOT analysis. In terms of ***spatial structure*** the following objectives are relevant:

- To promote and make use of the good international situation of the REGENSEA area in between five metropolitan areas;
- To promote the characteristics of the REGENSEA area like the combination of large open rural areas and coastal zones, medium-sized urban regions and metropolitan areas and to develop or regenerate some areas;

- To maintain and if possible extend the existing cross-sea relations between the UK and Flanders and the Netherlands;
- To stimulate the co-operation within the REGENSEA area in spite of the North Sea as a natural barrier;
- To start or extend the co-operation with respect to the spatial development perspective of the REGENSEA area, for instance in terms of tuning regional spatial development plans.

16 Directions for further operation for ***transport and infrastructure*** within the REGENSEA area are:

- To promote and stimulate sustainable transport modes in the REGENSEA area, both in passenger transport and cargo transport;
- To further integrate public transport services and to optimise public transport connections, including the optimisation of ferry transport between the UK and Flanders and the Netherlands. In addition, it should be investigated if it is possible to integrate the public transport ticketing systems;
- To tune planning procedures with respect to the construction of new cross-border/cross-sea infrastructure;
- To stimulate exchange of information and experiences between the REGENSEA partner regions, for instance with respect to promoting public transport, light rail systems, modal shifts towards sustainable transport modes, the improvement of hinterland connections for the seaports, etceteras;
- To improve the infrastructure between and around the seaports and the inland connections of the seaports, in close relation with the region's further development as an international multi modal transport region;
- To stimulate short sea shipping, as a major business opportunity for the medium-sized seaports in REGENSEA. In this respect, the conditions for short sea shipping in the seaports can may be improved by introducing a network of short sea shipping ports in REGENSEA;
- To investigate the necessity of and, eventually, to prepare a REGENSEA development perspective with respect to the seaports and their infrastructure connections;
- To investigate the opportunities for the improvement of sea-air connections (especially for cargo), taking advantage of the airports and seaports that are located in the REGENSEA area;
- To investigate and improve the connections of the REGENSEA area with the international High Speed Train Network;
- To develop an integrated vision on cross-border/cross-sea pipeline systems and underground logistic systems and, subsequently, to construct and/or connect pipelines and underground logistic systems.

17 With reference to the ***economic structure*** the following issues need attention for further co-operation within the REGENSEA area:

- Promoting and marketing of the REGENSEA area as an international infrastructure and logistic centre, with excellent sea, air, road and rail connection to the metropolitan areas in the NWMA;
- To improve and protect the function and meaning of seaports for the regional economy. Attention should be given to the seaport connection with the hinterland, opportunities of short-sea shipping, the restructuring of the traditional port-related industry, the negative impact of the Channel Tunnel on the international position of the REGENSEA ports, closer co-operation between the REGENSEA ports and the development of common educational initiatives and the exchange of information and experiences in the maritime sector;
- To develop new offshore activities like windmill parks;
- To develop the glass house industry, including new space for the expansion of this industry, the position of auctions and the exchange of information and experiences;
- To reconstruct the agricultural sector by creating new activities in rural areas, relocation of farms and opportunities for co-operation;
- Promoting cross-sea co-operation structures between companies to stimulate the exchange of knowledge and innovations and trade;
- To create opportunities for co-operation with respect to high-tech development.
- To investigate the need for a common strategy to stimulate the further development of the SME-sector;
- To promote international trade, joint business ventures and co-operation between business support organisations;
- To develop a common redevelopment strategy for the structural crisis in the agriculture and fishing industries. Special attention is needed for the labour market consequences of the economic crisis in the agriculture and fishing sector;
- To develop new (cross-border) locations for business activities in relation to the present shortages of business sites in the REGENSEA area.

18 Directions for further co-operation for the ***labour market*** within the REGENSEA area are:

- To investigate in what way it is possible for universities and politechnics to co-operate within the REGENSEA area;
- To introduce international business training and education programmes in close co-operation with the market sector and the universities to initiate new international networks in different sectors of the economy;
- To decrease or solve the problems of the shortage of employees in certain sectors, like for example technically educated persons, by a REGENSEA approach;
- To exchange experiences with relation to projects that have been focused on stimulating jobless people to enter the labour market again;
- To create a common strategy to create jobs for the unemployed low-skilled labour force;
- To create a common strategy to prevent that highly-educated people commute to the surrounding metropolitan areas and to stimulate that they find work within the REGENSEA area;
- To decrease juridical barriers to stimulate cross-border and cross-sea labour mobility and develop harmonisation of qualifications.

19 With reference to the ***environment*** the following issues need attention for further co-operation within the REGENSEA area:

- To stimulate cross-border and cross-sea co-operation to water management;
- To create a structural co-operation policy with respect to integrated coastal management. A lot of initiatives have already been taken and must form the basis for co-operation within the REGENSEA area;
- To reduce environmental problems like the:
  - pressure on fragile ecosystems from development, coastal erosion and impact of tourism and recreation on the coastal zones (i.e. waste);
  - pollutions as an result of the industrial areas like seaports, oil spills, coastal and mari-time litter and sewage;
  - exploitation of natural resources, notably fish and shellfish;
  - noice pollution by different causes like planes and other vehicles and industrial sites;
  - relatively bad quality of the water in the North Sea;
  - overpopulation in the metropolitan areas that increases the pressure of building in the rural areas nearby the urban areas;
  - rising sea levels, tidal surges and the changing frequency and severity of storms as a result of the greenhouse effect.
- To exchange information and experiences with attention to new cross-border nature development, sustainable agriculture, sustainable development of new business locations and redevelopment of existing locations, windmill parks, protection and management of valuable rural areas that are threatened by urban expansions and environmentally friendly entrepreneurship.

20 Directions for further co-operation for ***tourism*** within the REGENSEA area are:

- To co-operate within the tourism sector and introduce new cross-border and cross-sea arrangements and promoting and marketing of tourism in the REGENSEA area;
- To create opportunities to use the Internet and e-commerce for the tourism sector;
- To create new tourist attractions in the port towns to 'keep' tourists a longer time;
- To develop 'new' products with an international exposure like industrial and business tourism;
- To introduce a public transport integrated ticket and reservation system within the REGENSEA area;
- To improve international public transport connections between the main tourist destinations within the REGENSEA area;
- To exchange information and experiences on various issues like: partnership structures, financial issues, labour market and education, sustainable tourism, impact of ICT developments and rural tourism.

Chapter 1 The REGENSEA project

1.1 Background

Over recent years, a number of developments have influenced regional development in the European Union. There has been increasing internationalisation and globalisation of trade and manufacturing but at the same time, international co-operation between local, regional and national authorities has increased substantially. The intensification of co-operation between countries often starts with respect to economic development. Co-operation in monetary and trade policy contributes to the stability and further growth of economies: the introduction of the Euro is a very good example. Furthermore, co-operation increasingly takes place in other policy fields, like culture, science and spatial planning.

To anticipate on future developments and to stimulate transnational thinking with respect to spatial planning, the member states of the European Union and regional/local governments are currently developing transnational spatial planning policies for a new Europe. The North Western Metropolitan Area (NWMA) is one of the central regions in this new Europe. The Interreg II C program was launched with the aim of to developing a mutual approach to the opportunities and threats of new spatial developments. The Interreg II C programme aims to contribute to the execution of the European Spatial Development Perspective (ESDP). Specifically, it seeks to develop transnational spatial planning, in order to strengthen the spatial-economic structure, to stimulate the sustainable development of cities, to develop new transport infrastructure and to protect the natural and cultural heritage. For the period 2000-2006 the Flanders coastal zone and the urban areas of Gent (East Flanders), Rotterdam and the Hague (the Netherlands) have been selected as the objective II areas within the REGENSEA area.

1.2 The REGENSEA project

The Southern North Sea areas are part of the NWMA area. This area includes regions in Belgium (West Flanders and East Flanders), Great Britain (Suffolk and Essex) and the Netherlands (Zeeland and South Holland). Although different in character, they face similar problems and opportunities. Due to their focus primarily on their own capital city regions, cross-sea relations between those regions are at present rather weak, hence the REGENSEA project (Regeneration Sea Areas). The REGENSEA project aims to change this situation and to stimulate new spatial-economic and socio-economic cross-sea relations. The project intends to study the effect of a 180° change in the approach to spatial planning throughout the partner regions. The partners in the REGENSEA project are the provinces of West Flanders and East Flanders in Belgium, the counties Suffolk and Essex in the UK and the provinces of Zeeland and South Holland in the Netherlands. All these regions have common factors that influence spatial planning:

- they can be characterised as peripheral maritime areas;
- they are situated relatively close to their capital city;
- they are transit zones in terms of the NWMA;
- as maritime areas, they face similar socio-economic problems.

Peripheral maritime areas

From a national perspective substantial part of the six provinces of the REGENSEA area are relatively isolated and can be characterised as peripheral[2].

In most maritime regions vulnerable ecological areas can be found. These areas are threatened by erosion and pollution. However, the maritime regions also contain important coast- and sea-related tourist attractions. The contrast between the vulnerability of the regions from an ecological point of view and their position as important tourist areas asks for a sustainable and well-balanced spatial planning. Also the transport infrastructure and public transport provision in peripheral areas is less developed than in metropolitan areas.

Relation to capital city

The participating areas are all situated relatively close to their capital city and/or important economic centres (Greater London, Flemish Diamond and Randstad Holland). The challenge of the REGENSEA project is to maintain the strong economic relations with those cities, while at the same time identifying opportunities for new cross-sea economic relations. The underlying assumption of the REGENSEA project is that this will strengthen the economic position of the coastal regions.

Transit zones in the NWMA

The location of important seaports - like Rotterdam, Vlissingen, Terneuzen, Antwerp, Zeebrugge, Ostend, Felixstowe, Ipswich and Harwich - in the partner regions shows the important economic position of the coastal regions. As transit ports they contribute significantly to

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[2] Peripheral is a subjective concept that is used as a methaforical sense.

the growth of the national economies. Therefore, they can play a crucial role in the further spatial-economic development of the NWMA area.

Similar socio-economic problems

Many coastal regions are traditionally dependent on "old-fashioned" industries, like the ship building industry. Fishing is also an important economic sector in these regions. Major job losses have characterised the developments in these manufacturing sectors in the last decades. The results are still visible: obsolete and vacant manufacturing buildings, obsolete business locations, high unemployment rates, etc. Next to the socio-economic problems, historical-cultural issues are important. Cultural issues within the REGENSEA area are defined as "all expressions and sources with reference to art (theatre, dance etc.), media (radio, television and library), material inheritance (buildings, gardens etc.) and immaterial inheritance (dialects and history).

Objectives of the REGENSEA-project

The REGENSEA-project acknowledges the existence and influence of land areas across the North Sea, evaluating current cross-border/cross-sea relations and promoting future cross-border co-operation between the partner regions. A new vision on spatial planning in the participating regions and a strengthening of the spatial-economic relations between the regions will contribute to the acknowledgement of the position of these regions in the NWMA spatial vision. Besides, the project will stimulate sustainable economic relations between the regions. The ***main aims*** of the overall project are:

- to re-orient thinking on spatial planning and regeneration by acknowledging the existence and influence of land areas across the North Sea;
- to evaluate current levels of cross-border co-operation between partners;
- to encourage a joint strategic approach to spatial planning and regeneration in the partner regions;
- to promote networking and cross-border co-operation between partners.

In this context, the Province of West Flanders, on behalf of the REGENSEA partner regions, commissioned Buck Consultants International and Segal Quince Wicksteed LTD to carry out a SWOT analysis and to design a strategic vision for the partner regions on a coherent approach to spatial-economic and socio-economic development within the area. This final strategic vision must be based on the results of the pilot projects and focus groups that are part of the REGENSEA project.

In relation to the general objectives of REGENSEA ***the specific objectives of the present research project*** are:

- to analyse the strengths, weaknesses, opportunities and threats (SWOT) for the spatial-economic and socio-economic development for all partner regions, in relation to each other;
- to develop a thesis, based on the SWOT analysis, concerning the strategic options and vision that the involved partner regions should use, in order to achieve general objectives of REGENSEA;
- to design an integrated spatial vision for the Southern North Sea area, based on the evaluation and testing of the thesis in the REGENSEA pilot projects and focus groups;
- to develop an action programme for the REGENSEA partners, aiming to implement the partnership.

The results of the REGENSEA project will be used as a basis for further co-operation of the partner regions, including in the future also Norfork and North Holland, in Interreg IIIB.

1.3 Research questions and research design

Research questions

In relation to the current study, we defined the following research questions:

1 What are the strengths, weaknesses, opportunities and threats of the spatial-economic and socio-economic developments in each of the REGENSEA partner regions individually and in relation to each other?
2 Which framework can be developed to stimulate co-operation between the REGENSEA partner regions?
3 What are the strategic options and vision that the involved partner regions should use, based on the SWOT-analysis, with respect to spatial-economic and socio-economic developments in the Southern North Sea area, in order to initiate co-operation between the partner regions and stimulate a coherent spatial-economic and socio-economic development of the Southern North Sea area?
4 What kind of spatial vision can be developed for the Southern North Sea area, taking account of the results of the pilot projects and focus groups of the REGENSEA project?
5 What are the contents of the strategic action programme for the REGENSEA partner regions, aiming to implement the partnership?

Research design

Taking the research questions as a starting point, the research project has been carried out along four phases:

1 In phase one ***a SWOT analysis of each of the partner regions and in relation to each other*** has been carried out.

2 In phase two ***a thesis concerning the wished for spatial-economic and socio-economic developments in the Southern North Sea area*** has been developed, in order to initiate co-operation between the partner regions and stimulate a coherent spatial-economic and socio-economic development of the Southern North Sea area.

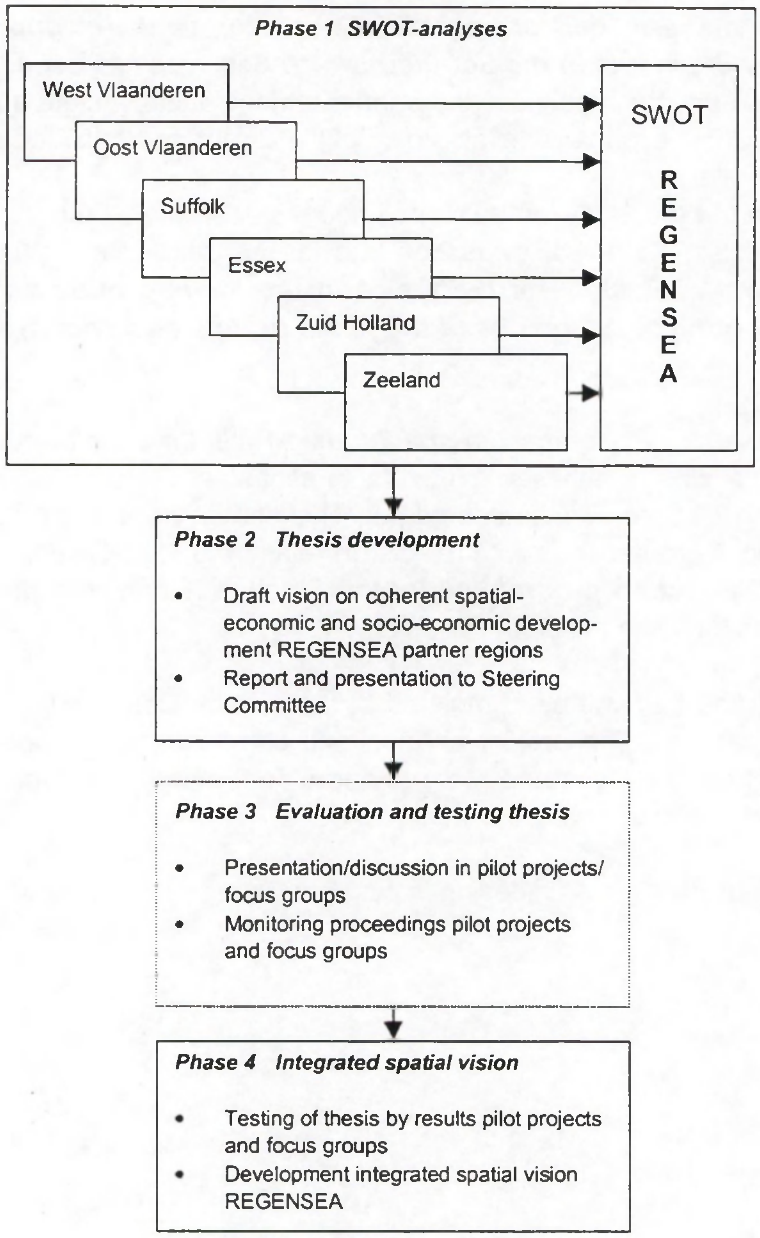
3 In phase three the thesis will be evaluated and tested in the REGENSEA focus groups and pilot projects. The actual evaluation and testing is not part of the present study. However, ***a first discussion of the thesis in the focus groups and pilot projects and the monitoring of the results of the focus groups and pilot projects*** are part of the project.

4 Finally, in phase four ***an integrated spatial vision will be developed*** for the REGENSEA partner regions, emphasising the transnational and cross-sea character of the Southern North Sea area will be carried out. This spatial vision will be based on the results of the focus groups and pilot projects. In relation to the REGENSEA spatial vision ***an international action programme*** for the Southern North Sea area will be developed, aiming to implement the spatial vision.

Phases one, two and four will be completed by both Buck Consultants International and Segal Quince Wicksteed. The project partners will complete phase three. This research report is the result of phase one and two and has a draft status. After finishing the phases three and four, the final report will be completed.

Figure 1.1 represents the research design in diagram form.

Figure 1.1 Research design in diagram form



Note: Phase 3 is not commissioned by BCI/Segal Quince Wicksteed

1.4 Social economic analysis

The social economic analysis of the REGENSEA area examines: spatial structure and development perspective, transport and infrastructure, economic development, the labour market, the environment and tourism. The analysis focuses on of the regions that are part of the REGENSEA area and on the existing (and lacking) relations between those regions. With respect to the latter, both 'North-South' and (cross-sea) 'East-West' relations have been taken into consideration.

A substantial part of the REGENSEA area is co-incident with the Euregion Scheldemond: the provinces of West Flanders, East Flanders and Zeeland. In this part of the REGENSEA area the effects of the INTERREG I and the INTERREG II Programmes are clearly visible: various obstacles to cross-border co-operation have been removed and numerous examples of cross-border co-operation have been developed.
The present social-economic analysis takes into account the 'results' of the efforts of the Euregion Scheldemond to strengthen the cross-border relations between the provinces of West Flanders, East Flanders and Zeeland. We have also used the recent social-economic analysis that has been carried out as part of the Operational Programme Euregion Scheldemond INTERREG IIIA.

The main added value of the present analysis is, however, the focus on the (meaning of) cross-sea relations between Suffolk and Essex in the UK and, respectively, West and East Flanders in Belgium and Zeeland and South Holland in the Dutch part of the REGENSEA area. In this respect the analysis pays attention to the existing cross-sea relations and opportunities for more intensive cross-sea relations in the future.

To carry out the analysis we have mainly made use of existing regional study reports[3] and the results of the recent social-economic analysis of the Euregion Scheldemond. The information from these documents has been supplemented through regional workshops and information provided by the partners in the REGENSEA project. Data and insights of the two consultant agencies complete the sources of information.

1.5 Current relations between the regions

Traditionally there have not been strong links between Essex and Suffolk, other than those that may be expected from adjoining local authorities. The reason for this is twofold: first, the two counties are in different regional planning areas (although this is changing), so most cross-border working has been with other local authorities, not with each other. Second, the

[3] See list of literature.

two counties do not share any significant resource such as a large border settlement or transport node. A consequence of the limited links to date is the existence of strong economic partnerships within the counties in particular the Essex Economic Partnership (EEP) and the Suffolk Development Agency (SDA), but only a recent move for cross-border partnerships. This trend is however likely to increase in future, in particular in response to the East of England Development Agency and co-operation on attracting both EU and national funding.

In addition to the links between the two counties links have also been developed with other REGENSEA partners. In particular:

- Suffolk and West Flanders signed an Accord in 1995, covering co-operation in the areas of economic development, ports and transport, tourism, education, rural development, welfare and equal opportunities. The Accord has been extended towards the Province of Zeeland in the field of education.

- Political, cultural, economic and environmental links exist between Essex and the Province of South Holland. These stem from the passenger/car ferry between Harwich and the Hook of Holland and movement of freight between Harwich and the ports of South Holland. This is the most important transit route in the North Sea/English Channel area, following the Channel Tunnel.

In 1989 the Euregion Scheldemond was founded: a co-operation between the provinces of East and West Flanders and Zeeland. This region is mainly focused on economic development within the three provinces. One task within its remite has been to signal and formulate common interests. A second task has been to stimulate cross-border co-operation with reference to spatial planning, environment, tourism, transport and infrastructure, health care, social economic affairs, education and culture. The first common development strategy was developed in 1991. On the basis of this strategy many projects have been developed within the INTERREG I and II program. For the Euregion Scheldemond, now an Intereg III program (2000-2006), has been prepared.

Finally, the links between South Holland and the regions of Zeeland, and East and West Flanders are relatively weak. This is due to the fact that South Holland must primarily be considered being part of Randstad Holland, with a strong emphasis on the 'internal' relations with North Holland and Utrecht.

In the following chapters the relations between the partner regions will be discussed more in detail.

1.6 Other projects in the coastal zones

In the North West Metropolitan Area a number of related European funded projects are currently being carried out. These projects may have an impact on (part of) the REGENSEA area.

- ***ANORCOAST*** is an interregional co-operation programme for practical solutions to coastal zone management in the North Sea region. The programme runs from 1998/9 to 2000/01 and involves regional authorities from seven countries, including Suffolk County Council. It has four main phases:

  - preliminary investigations of existing planning and management systems, good and bad practice etc.;
  - inter-regional seminar to exchange experience;
  - hands-on -involving pilot projects in each of the seven countries participating in the programme;
  - final seminar to present pilots, overall conclusions and recommendations.

- ***MAYA*** is a project about marina and yachting in the lower North Sea, the Channel area and the Irish Sea within the North Western Metropolitan Area (NWMA). Five countries (a total of fourteen regions) participate in this project: The Netherlands (including the province of South Holland and Zeeland), Belgium (including the province of West Flanders), France, the United Kingdom (including the counties in Essex and Suffolk) and Ireland. This project started in September 1999 and will last 20 months. The MAYA project is lead by the province of Zeeland and has the following six objectives:

  - the development of a spatial vision and the impact of the Marine development in lower North Sea, the Channel area and the Irish Sea;
  - support of sustainable mobility in the region, including market research (?) into the growing demand for leisure boating and the feasibility of the development of new leisure boating routes, in confrontation with the traditional streams of transport in the lower North Sea;
  - an analysis of the complementarity of the services between the marinas in this region;
  - an analysis of the economic impact of marinas in this region;
  - marina's and natural environment: definition of standards on spatial planning for the development of marina's in this region;
  - definition of a methodology for intensive land (?) use: development of well-balanced systems to accommodate diverse functions, working on limited spatial areas.

- **PLANARCH** stands for "Planning and archaeology". This project brings together nine partners from four countries (The Netherlands, France, Belgium and the United Kingdom) located around the Southern North Sea Basin. The provinces of South Holland and East Flanders and Essex County Council are three of the nine partners in the project. The PLANARCH project started in November 1999 and will last until December

2001. The project is led by the Kent County Council and has the following four objectives:

- to share knowledge and experiences that will lead to a better understanding of its historical importance and the scope of its archaeological remains;
- to develop methodologies for improving archaeological decision-making through desk-based assessment, field evaluation and predictive modelling at regional and local levels;
- to examine organisational and legislative frameworks in order to further understanding of their respective strengths and weaknesses and to encourage implementation of best practice for mitigating impacts on archaeological resources through the spatial planning process in areas such as statutory land use plans, approaches to infrastructure project planning and regulatory control of development in general;
- to investigate approaches to conserving sites of archaeological value and presenting them to the public.

- ***SAIL*** stands for "Schéma d'Aménagement Intégré du Littoral". This means: integrated management of the Coastal Zone of the Central and Capital Cities Area. Five nations within the NWMA (a total of twelve regions) are participating in this project: Belgium (including the province of West Flanders), The Netherlands (including the province of Zeeland), France and the United Kingdom (including the County of Essex). This project started in January 2000 and will last two years. The SAIL project is lead by the province of West Flanders and has the following objectives and main activities:

  - a framework for the integration of policy formulation and strategic management throughout the coastal zone of Central and Capital Cities area of the NWMA;
  - an information infrastructure to support transnational planning and management based on the generation of sustainability indicators for the coastal zone and the creation of a meta data architecture;
  - local, regional and transnational actions to enhance the socio-economic and environmental quality of an area generally peripheral to the main axes of development.

Since the projects are on-going, results are not yet available. It is expected that during phase three and four of the present project more information will become available. This information will be used in phase three and four to complete the report.

1.7 Relation to the NWMA spatial vision[4]

Spatial Planning in North-West Europe

North-West Europe is one of the most dynamic urban and regional systems in the world. The massive concentration of people, economic production, infrastructure, knowledge and cultural assets has brought great prosperity. But it also presents many challenges for managing the spatial development of the territory – the polarisation of economic growth and urban development; pressures on the natural environment and quality of life, traffic growth, energy use and congestion, inequalities, social exclusion, and more. The strong interdependence of the regions of north-west Europe means that these problems are shared. They can only be successfully tackled through co-operation.

The Member States of north-west Europe together with regional and local governments are co-operating on transnational spatial planning for the North Western Metropolitan Area.

An operational programme has been prepared under the Interreg IIc Community initiative.

The objective is to develop joint approaches to opportunities and threats posed by spatial development trends. The operational programme seeks to begin implementation of the principles of the European Spatial Development Perspective and to contribute to its further elaboration.

The programme is funding transnational spatial planning projects on the competitive and sustainable development of cities; transport infrastructure and information and communications technology; and the management and enhancement of the natural and cultural heritage.

The NWMA Spatial Vision

Important though the individual projects are, it is critical to the success of the programme will depend on a broader strategy for co-operation on spatial planning for the region. Therefore it is proposed to prepare a long-term multisectoral spatial vision. The spatial vision will link the objectives of the ESDP with the spatial development policies of the constituent countries and regions.

The spatial vision provides a forum for the countries and regions of north-west Europe to agree common long-term spatial development goals on issues of European or transboundary significance. It will provide a platform for creating greater complementarity and synergy of national and regional policies with a spatial dimension. It will give guidance on where future transboundary collaboration on spatial planning should be concentrated. Col-

[4] Based on information from the North Western Metropolitan Area Spatial Vision website (www.uwe.ac.uk/be/vision).

laborative spatial planning projects already underway, and current national and regional spatial development policies make an important contribution to the vision. The overall objective of the vision is to contribute to more cohesive, balanced and sustainable development; and to promote co-operation rather than competition in the region.

The development of a spatial vision is closely related to the other specific projects funded within the programme. The spatial vision will both draw from the individual projects and provide strategic direction for them. It will look for integration and complementarity amongst the projects, and thus provide a strategic framework for future co-operation under the proposed Interreg III. It will look beyond the territory and scope of the NWMA to consider linkages to other programmes and national and regional policies.

The focus of the NWMA spatial vision will be on the development of metropolitan areas and their wider impacts. The starting point for analysis will be previous transnational, interregional and cross-border studies and strategies, such as the Central and Capital Cities and Regions Study, and Europe 2000+. It will be non-binding but should provide an important influence on national and regional policy. It will address transnational spatial planning issues only.

Spatial Vision priorities and Interreg IIc projects

The NWMA spatial vision recognises five priorities:

- Priority 1: how to enhance the external accessibility of the NWMA?
- Priority 2: how to promote internal transnational accessibility through sustainable movement patterns?
- Priority 3: how to promote environmental sustainability within the NWMA?
- Priority 4: how to promote external investments by strengthening urban networks?
- Priority 5: how to promote transnational conditions, which underpin indigenous economic development potentials?

All Interreg IIc projects support at least one of these priorities. The REGENSEA-project fits in Priority 5.

1.8 Structure of this report

Chapter two to seven contains a general social economic analysis of the REGENSEA area. In ***chapter two*** the spatial structure and development of the REGENSEA area has been described. ***Chapter three*** describes the transport by road, port, railway and air in the REGENSEA area and its infrastructure. Economic development in the REGENSEA area is subject of ***chapter four***. ***Chapter five*** gives a description of the labour market in the REGENSEA area. In ***chapter six,*** the environmental situation of the REGENSEA area is discussed. The tourism industry within the REGENSEA area is described in ***chapter seven***. Based on the chapters two to seven, ***chapter eight*** presents a SWOT analysis for the REGENSEA area (phase 1). ***Chapter nine*** provides a draft vision for coherent spatial-economic and socio-economic development of the REGENSEA area (phase 2).

As mentioned, the present report has a draft status. After the evaluation and testing of the thesis by the focus groups and pilot project (phase 3), an integrated spatial vision for the REGENSEA area will be developed (phase 4). This spatial vision will then be integrated in the present report.

Chapter 2

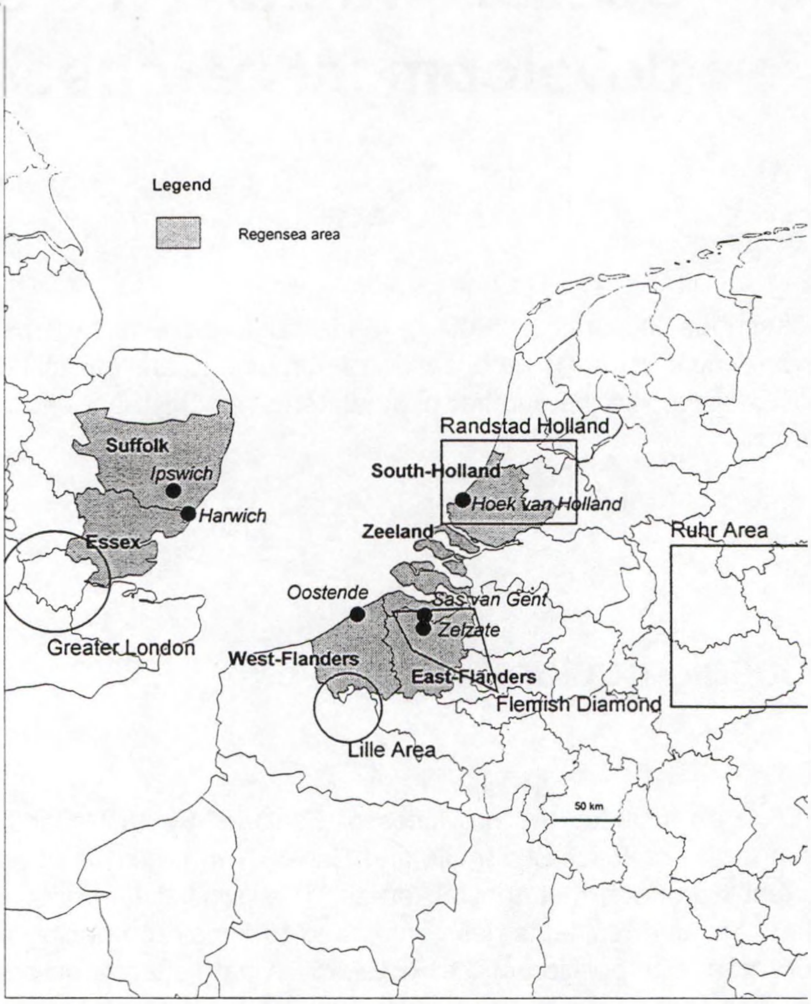
Spatial structure and spatial development perspective

This chapter describes the spatial structure and spatial development perspective in the REGENSEA area. Table 2.1 gives an overview of some general statistical data with respect to the REGENSEA area, like the number of inhabitants, employment and infrastructure like harbours and ports.

2.1 Spatial structure

The REGENSEA area includes the provinces of Zeeland, South Holland, East Flanders, West Flanders and the counties of Suffolk and Essex. The region is strategically situated between important European metropolitan areas. The existing international orientation of the area's businesses and residents has contributed to the strengthening of the position of the REGENSEA area. The position of the REGENSEA area situated in-between Randstad Holland, the Flemish Diamond, Greater London and the metropole of Lille positively affects the functioning of this region (see figure 2.1). Also the Ruhr area is situated nearby the REGENSEA area and affects the functioning of the region.

Figure 2.1 The situation of the REGENSEA area and the surrounding metropolitan areas



The REGENSEA area derives special qualities from its spatial location and has an attractive living environment. Situated between land and sea, portal and urban regions, and main transport arteries, the region combines urban environments with open areas and international connections with (historical) towns and villages in the countryside. The spatial structure of the REGENSEA area is varied. It includes large urban regions around The Hague, Rotterdam (The Netherlands), Brussels and Antwerp (Belgium). More or less in contrast with the surrounding metropolitan areas, a large number of medium-sized towns are located within the REGENSEA area, like Brugge, Gent, Kortrijk, Dordrecht, Leiden, Middelburg, Vlissingen, Ipswich, Southend-on-Sea, Chelmsford, Colchester, Harwich, Bury St Edmunds and Saffron Walden. The spatial structure is also characterised by large open (rural) areas offering space for recreation. For example Walcheren, North- and South Beveland, Schelde- and Zeepolders, the Green Hart (The Netherlands), Flemish and Zeeuwse Creek area, Waasland, Meetjesland, Flemish Houtland, Westhoek, Flemish hills and Flemish Ardennes (Belgium). In addition north Essex and Suffolk are characterised by a high proportion of rural areas with dispersed village communities. Particularly in the coastal areas, various areas of natural beauty can be found.

Though some parts of the REGENSEA area are relatively isolated and can be characterised as peripheral, this is 'compensated' by the good infrastructure connections to the surrounding metropolitan regions (see also chapter 3). However, especially in the rural areas, the quality of life is sometimes threatened: service provision is often comparatively poor.

The southern part of Essex is highly urbanised with six districts containing almost half the population. The northern part of the county is more rural with few settlements of any size, the largest being Harlow, Chelmsford and Colchester. In addition, the southern part of the county falls within the Thames Gateway, which is a major area of regeneration with substantial potential for housing and economic development. However, much of this potential needs to be 'unlocked' by transport improvements (see also chapter 3). Also in East Flanders and South Holland most people live in urban environments. The larger part of South Holland is, being part of the Randstad Holland, strongly developed as a centre for economic activities. The expansion of economic activities in large parts of South Holland sometimes threatens the open areas. West Flanders is the most rural province of Flanders. Agriculture and the agri-business sector are important economic sectors within West Flanders, resulting in an open landscape. The urban pattern is characterised by four regional urban centres, namely Brugge, Ostend, Roeselare and Kortrijk (that is part of the cross-border metropolitan area of Lille). Close to the Dutch border, a number of smaller towns, like Blankenberge and Knokke-Heist can be found.

A large part of the coastal zones in the REGENSEA area has been developed either as a centre for economic activities (seaports), or as main tourist attractions (beaches, dunes and nature reserves). The medium-sized seaports (Ostend, Lowestoft and Harwich) suffer from the competition with the Channel Tunnel. In some regions this has led to economic decline. The large seaports in the REGENSEA area (Rotterdam, Vlissingen, Terneuzen, Gent, Zeebrugge, Waalhaven, Felixstowe and Tilbury) focus more on other market segments, and their development has not been much influenced by the Channel Tunnel (see also chapter 4). The main tourist attractions are the coastal areas of Zeeland, South Holland, Suffolk cost and heaths (including Waveney, Dunwich, Southwold, and Aldeburgh), south and east Essex (including the Blackwater estuaries).

Currently from a geographical point of view, the REGENSEA area cannot be seen as one integrated region; the North Sea is a clear barrier to further integration. The only direct connection between the United Kingdom and the continent is the Channel Tunnel and that is not situated within the REGENSEA area, and could be considered as a contributing factor to Felixstowe loosing its passenger ferry link with Zeebrugge. The international position of this region has been negatively influenced because passengers and good transport have been partly transferred outside the REGENSEA area. The lack of north south public transport between Zeeland and West and East Flanders also acts as an obstacle to further integration. As a result, the internal relations between the regions within the REGENSEA area are at present rather weak. Most of the component parts of the REGENSEA area have much more intensive relations with the surrounding metropolitan regions: for example the travel to work pattern in Essex is dominated by commuting to London, in East Flanders it is dominated by commuting to Brussels and Antwerp and in South Holland it is dominated by commuting to Rotterdam, The Hague and Amsterdam.

2.2 Spatial development perspective

The Dutch and Belgian regions are an important part of the Rijn-Schelde-Delta, as the natural entrance to the continent, while Suffolk and Essex are in turn part of the natural entrance to the UK. Patterns of urban and regional economic development are substantially influenced by this port/gateway function. Also the position of the REGENSEA area between the large metropolitan areas (e.g. spin off effects) and important areas of natural beauty, have a substantial impact on the economic development processes in this area. The challenge for the REGENSEA area is to harmonise urban and economic development with the protection of environmentally sensitive rural and coastal areas.

From March 2001 responsibility for regional planning will be passed to a new planning body for the six counties within the East of England in which the existing Government Office will have a certain role. Until now the two counties have been split between the South East and East Anglia planning regions[5].

Comprehensive reviews of both the Suffolk and Essex County Structure Plans were undertaken in the last two years. A 'Deposit Draft' of the revised Suffolk Plan was published in 1999 with formal adoption of the plan (i.e. as a statutory document) expected later this year, however, adoption of this plan is unlikely to take place until 2001. The Essex draft deposit plan was published in February 1998 for formal consultation and remains the most up to date planning document for the area. During this period four of the district authorities in Essex - the Boroughs of Colchester, Southend-on-Sea and Thurrock and the District of Tendering - became unitary authorities. Both Plans outline the strategic aims of the documents. For Suffolk the aims are:

- to sustain and enhance the health, quality and integrity of the built and natural environment;
- to promote a healthy economy, meet identified housing requirements, integrate provision for development and transport, and provide for leisure and social needs. ***A qualification in this second aim indicates that there may development thresholds beyond which impact on environmental resources may be unacceptable***.

Suffolk has a population of 667,000. The structure plan forecasts an increase in population of 85,000 between 1993 and 2016, and makes provision for an increase in housing units of 62,000 over the same period. These figures assume substantial net in-migration throughout the plan period, and are generally consistent with actual experience since the late 1980s. The plan envisages major growth in the two main towns of Ipswich and Bury St Edmunds, and also substantial provision for new housing and employment in Lowestoft, Stowmarket, Sudbury and Haverhill. In addition a new community of 1,200 dwellings is planned at the former USAF/RAF Bentwaters site.

The Essex plan has the following strategic roles:

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5 See Appendix for information about the national land use planning system in the UK.

- to ensure that the provision for development in the area is realistic and consistent with national and regional policy;
- to provide the strategic framework for and ensure consistency between the local plans and development control.

In comparison to Suffolk, Essex has a substantially larger resident population of about 1.28 million people. The structure plan forecasts a need for additional 70,200 dwellings between 1996 and 2011 to accommodate population growth. This can be compared with current provision in local plans amounting to 65,600. However, the structure plan envisages that 60% of the new housing will be accommodated within existing urban areas, which will limit the impact on the rural parts of the county. The largest number of houses is likely to be built in Basildon, Chelmsford, Thurrock, Colchester and Braintree.

In 1997 the province of West Flanders has published a regional spatial structure plan[6]. This outlined plans for the spatial development of the region in the period 1997-2007. The function of the structure plan was to 'structure' spatial development both in the urban regions and the open areas and also with respect to the expansion of economic activities and infrastructure development. The starting point for the vision on spatial development of West Flanders is the spatial diversity. The objective of the structure plan is to maintain and strengthen this diversity by sustainable development. The province of West Flanders had around 1.12 million inhabitants in 1998. The expectation is that there will be 1.14 million inhabitants in 2007. Because of the growth of inhabitants also new houses are needed. It is expected that around 69,000 dwellings will be needed between 1991 and 2007.

Gent, Brussels, Antwerp and Lille-Kortrijk[7] dominate the spatial structure of economic activities, traffic and settlements in the province of East Flanders. In the draft version of the structure plan the following objectives were formulated:

- Gent has a good location for international transport. It is a port with potential and has the scope for a stronger distribution function and cultural events. However, these qualities have to be supported.
- The gates of the Flemish economic structure are very important for the economic developments and must be maintained and strengthened.
- The potential of the highway E17 has to be used.
- Wetteren and Aalter are development areas; they have both been selected as economic areas in the Structure plan of Flanders.

At present around 1.38 million people live in East Flanders. It is expected that the number of inhabitants will increase to 1.40 million by 2007. This implies that the demand for housing will increase. The Flanders structure plan registered that 57,000 to 66,000 new dwellings will have to be built between 1991 and 2007.

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6 This plan was approved on 29 June 2000.

7 Brussels, Antwerp and Lille-Kortrijk are not situated in the provinces of East Flanders.

The development perspective of South Holland is closely connected to the development of the Randstad Holland, since a large part of South Holland makes up the Southern wing of the Randstad. In this context, the main objectives are:

- to create a greater cohesion and interplay between the urban and rural areas;
- to put the available land to best possible use areas for residential development, recreation, nature, agriculture, economic activities and infrastructure.

In 1998, around 3.36 million people were living in the province of South Holland. It is expected that the number of inhabitants will increase to around 3.47 million by 2010. The demand for housing will be substantial. Between 1998 and 2005 65,000 new dwellings will have to be built. By 2030, at least 350,000 new dwellings have to be built.

The spatial structure plan for the province of Zeeland dates from 1997. The central objectives are to stimulate the spatial quality and to increase employment in Zeeland. These objectives are strengthened by a number of related objectives:

- To concentrate housing, businesses and infrastructure that stimulates the development of cities and rural areas;
- To offer large business sites with a high quality;
- To improve the economic position of the tourist sector by the maintenance and improvement of the quality of tourist products;
- To improve the accessibility of services;
- To accommodate necessary changes in rural areas, due to the negative impact of restructuring processes in this sector developing and stimulating agricultural innovation;
- To strengthen the quality of rural areas by taking advantage of the ecological characteristics of Zeeland.

Almost 370,000 people were living in Zeeland in 1998. This number will increase to around 384,000 inhabitants by 2008. The demand for new housing is expected to be limited, around 15,000 new dwellings are anticipated in the period until 2008.

To date, the regional structure plans within the REGENSEA area have not explicitly been attuned to each other and there is no cross-border co-operation in relation to town and country planning. However, the confirmation of the European Spatial Development Perspective in May 1999 offers opportunities for the development of new European areas. However, the development of network structures at different spatial levels could strengthen the position of the REGENSEA area. Cross-border co-operation of town and county planning and building developments could contribute to a sustainable development of this area.

Finally, table 2.1 shows some general statistical data with respect to the REGENSEA partner regions.

Table 2.1 General statistics partner regions [8]

Province	Suffolk	Essex	West Flanders	East Flanders	South Holland	Zeeland
County town	Ipswich	Chelmsford	Brugge	Gent	The Hague	Middelburg
Inhabitants 1998	667,000	1,288,000	1,125,140	1,357,576	3,360,000	369,945
Expectation inhabitant	730,720 5)	-	1,140,000 1)	1,400,000 1)	3,470,000 2)	384,000 3)
Population growth	10%	-	1,3%	3,1%	3,3%	3,8%
Surface (km^2)	3,798	3,469	3,135	2,982	2,867	3,039
Gross domestic product 1995 (milliard Euro)	11.0	23.8	20	23	164 4)	7.5
Gross domestic product per inhabitant (Euro)	16,602	15,005	17,800	17,000	21,925*	20,400
Employed people (million)	0.63	0.35	0.36	0.40	1.40	0.16
Unemployment (1998)	5.9%	5.4%	5.5%	7.2%	6.4%	5.6%
Industrial ports	• Felixstowe • Ipswich • Lowestoft	• Tilbury • Harwich	• Brugge • Ostend	• Gent • Waasland (Beveren-Kallo)	• Rotterdam • Vlaardingen • Schiedam	• Vlissingen • Terneuzen
Airports	• Ipswich	• Southend	• Ostend	-	• Rotterdam	-
Number of companies (1997)	265,54	587,49	32,427	31,885	134,400	18,218
Availability of business/industrial sites (hectares)	568.2	715	909	1,727	1,100	955

1) 2007
2) 2010
3) 2008
4) 1997
5) 2016
Na: Not available

Source: Euregion Scheldemond Interreg III program 2000-2006; Regional Trends 34, ONS; Suffolk Tourism Strategy

[8] It should be remarked that the figures have been accomplished by different methods and sometimes different sources have been used. Therefore not all figures could be (fully) compared to each other.

2.3 Main conclusions with respect to spatial structure and spatial development perspective

- From an international perspective, the REGENSEA area is quite well situated between ***large metropolitan regions***. The larger part of South Holland belongs to the Randstad metropolitan region, a small part of East Flanders belongs to the Flemish Diamond, West Flanders is part of the metropolitan area of Lille and Essex is next to the metropolitan of Greater London. On the other hand, from a national perspective, substantial parts of the REGENSEA area are also isolated and can be characterised as peripheral (though it is questionable whether there are any truly peripheral regions remaining in the NWMA region).

- Important ***characteristics*** of the REGENSEA area are the combination of medium-sized urban regions, metropolitan regions, large open rural areas and the coastal regions, the high quality of living in some areas, the combination of various 'sea-related' activities in the coastal regions (seaports, tourism and areas of natural beauty) and the need for regeneration in some areas, for example South Essex and the Flemish coast.

- The opening of the ***Channel tunnel*** has negatively influenced the international position of the REGENSEA area and as a result, cross-sea relations, especially between the Belgian and the UK regions, have been reduced.

- It seems that each of the sub-regions has its ***primary functional links*** with the nearby metropolitan regions. As a result, the cross-sea relations between the regions that are part of the REGENSEA area are at present rather weak. The North Sea is – from a spatial perspective - a clear barrier to the further integration of the REGENSEA area. On the other hand, the integration of the Dutch and Belgian regions have certainly improved, among other things because of the results of the INTERREG I and II programmes for the Euregion Scheldemond.

- The ***spatial planning systems*** of each of the regions are not attuned to each other. This may be explicable in terms of the spatial structure plans of the Belgium and Dutch regions; this is an issue that will be dealt with by the Euregion Scheldemond. It does not seem necessary however to the spatial development perspectives of the Belgium and Dutch regions on the one hand and the spatial development perspective of the UK regions on the other hand.

Chapter 3 **Transport and infrastructure**

This chapter describes the different transportation facilities in the REGENSEA area. Ports and multimodal transport facilities are generally well developed. The infrastructure in the REGENSEA area is mainly characterised by east-west connections. Therefore, the connections with the hinterland are quite good, by both road and rail. However, considering cross-border co-operation within the area, the north-south connections are less developed. Also the existence of the water is an obstacle for extensive exchange on both sides of the North Sea.

3.1 Transport policy

Currently all regions in the REGENSEA area have relatively high levels of car use and low levels of public transport use: this is typical of a predominantly rural area. This trend will probably continue because of the increase of car ownership, the increase of the service sector, the increase of free time, the increase in flexible work and part-time work and the use of alternative routes to avoid traffic congestion. These trends have led to the following mobility problems: the decreasing accessibility of cities and towns, reduced traffic safety, traffic jams and a restriction of transport and distribution potential. It is expected that these problems will increase in the future. Although the regions within the REGENSEA area cope with similar mobility problems, so far no cross-border (public) transport concepts have been made. For example: national policies for the transportation of cargo differ (gas prices and road tax) and the accessibility of the ferries by public transport is weak. In order to stimulate economic growth within the REGENSEA area it is necessary to invest in (public) transport and infrastructure.

In Suffolk, the County Structure Plan proposes to develop an integrated approach to transport planning, in accordance with national government policy. Increased use of public transport, and reduced dependency on the car, will be encouraged, but in reality the County Council has little power or resources to secure modal shift.

The Essex Structure Plan recognises that travel patterns are heavily influenced by London as 25% of the resident workforce commute to London and only 60% work in the same district. At peak time traffic flows lead to congestion on many roads, having increased over 50% in the last 40 years. In response, the plan's transport policies reflect the underlying principle of encouraging access to alternative transport modes as a means of increasing accessibility for rural communities and improving the environment in more urban parts of the county. The southern part of Essex is part of the Thames Gateway that is a major area of regeneration with substantial potential for housing and economic development. However, much of this potential needs to be 'unlocked' by transport improvements. These include the long-term possibility of a lower Thames crossing from south Essex to north Kent.

The province of West and East Flanders seeks to guarantee the accessibility of the cities and gates in Flanders. In order to prevent traffic jams, public transport should be used more often instead of the car, at least in the urban areas. Flanders tries to reach this objective by the development of suburban public transport nets and transfer points, by concentrating functions at multi modal places and by connecting stations outside the city with busses to the city.

The province of South Holland also wants to guarantee a good accessibility in the future. Therefore, transport policy focuses on the improvement of the quality of public transport by introducing Randstadrail, the ZORO line (line between Zoetermeer and Rotterdam), the Rijn-Gouda line and the circle line around the Drechtcities. Moreover free buslanes will be implemented. Other initiatives to improve the accessibility include the enlargement of the capacity of some important roads (like the A4-Zuid and N11), to stimulate selective car use and to enlarge the share of inland navigation and rail within the transport of cargo.

Finally, the province of Zeeland wants to decrease car use. The use of passenger and freight transport means that are less harmful to the environment has a positive effect on the quality of life in the province. Zeeland notices that a car will unfortunately often be necessary in rural areas. However, alternatives for car-use are offered whenever feasible.

3.2 Road infrastructure

The road infrastructure in the REGENSEA area has developed well (figure 3.1). It appears that the road infrastructure in every region of the REGENSEA area is mainly focused on the accessibility of the surrounding metropolitan areas.

The road infrastructure in Suffolk and Essex has developed around and is characterised by strong radial links with London and, with the exception of the M25 and A14, by poor orbital links. Therefore although the area's principal road corridors, such as the A12, M11 and A14 are well-developed, the roads to the more remote locations, such as Lowestoft and rural Suffolk, are poor and act as a constraint on development. The main road links in the region are the:

- M11/A11 - London to Cambridge and north towards Norwich
- A12 - London to Chelmsford, Colchester, Ipswich and Lowestoft
- A13/A130 - London via the Thames Estuary to Chelmsford

- A14 - from the Midlands to Harwich/Felixstowe
- A127 - London to Southend on Sea
- A120 - from Stansted airport to Colchester and Harwich

Over the last 20 years there has been substantial investment in the primary road network, but there remain substantial variations in capacity relative to use. The Essex Structure Plan identifies that both lateral (e.g. M25, A13) and north-south (e.g. A130) movements are restricted, and further increases in capacity will be necessary to accommodate future growth. In Suffolk it is envisaged that future investment will need to be mainly in management and maintenance of the network, resolving local environmental and safety problems, and identifying suitable routes for lorries.

The main infrastructure in West and East Flanders is focused on the urban regions of Brugge, Ostend, Antwerp, Brussels, Kortrijk and Rijssel. Gent is situated in the middle of all regions. There is a network of international, national and regional highways:

- E17 Parijs-Kortrijk-Gent, Antwerp-Eindhoven;
- E40 (A18/A10/A3) connects London-Calais-Gent-Brussel-Luik-Aken-Ruhrgebied;
- A8 Kortrijk-Brussels;
- A11 Antwerp-Knokke;
- A12 Brussels-Antwerp;
- A17 Brugge-Kortrijk;
- A18 Kortrijk-Ieper;
- A19 Brussels-Antwerp.

There are also a number of regional roads (N-routes) that connect Flemish cities to the highways. To improve international transportation in West Flanders, various developments have been initiated. For example, route N49, from Antwerp to Leftbank to Knokke, will be transferred into a highway and will be connected to the port of Zeebrugge.

The highway infrastructure in South Holland and Zeeland is well developed and offers good access to the national and international highway network. Important highway connections are:

- A4 highway: connects Amsterdam via Leiden with The Hague and Rotterdam and runs via the A29 or the A16 (Antwerp (Belgium). In Rotterdam, a second tunnel is under construction and will be ready in 2002;
- A12 highway: The Hague - Gouda - Utrecht - Arnhem - Germany (Ruhr area);
- A15 highway: Rotterdam - Gorinchem - Nijmegen - Germany (via the A73/A77);
- A16 highway: Rotterdam - Dordrecht - Breda - Antwerp (Belgium). The intersection of the A16 and A15 nearby Rotterdam (Ridderkerk) is being upgraded and will be ready in 2000;
- A20 highway: Hoek van Holland - Rotterdam – Gouda;
- A27 highway: Almere(A6) - Hilversum - Utrecht - Gorinchem - Breda (passes through the Eastern part of the province);
- A29 highway: connects Rotterdam via the A59 with the A17 which leads to Antwerp (Belgium);

- A13 highway: connects The Hague with Rotterdam;
- A11 highway: Leiden - Alphen aan den Rijn - Bodegraven is now under construction;
- A44 highway: connects the A4 with Sassenheim - Leiden and Wassenaar and leads via the N44 to The Hague. This last section will be upgraded soon.

The N11, between Leiden and Alphen aan de Rijn currently is being upgraded. Designated truck lanes are constructed at the north-eastern access way of Rotterdam.

Zeeland is 'surrounded' by three highways:

- A11 Antwerp-Knokke in Belgium (south);
- A4/A29 Rotterdam-Antwerp (east);
- A15 Europort Rotterdam-Germany (north).

Together these highways form a 'horseshoe'. The east-west highway A58 connects Zeeland with this 'horseshoe' and is used by east-west traffic as well as medium and long distance north-south traffic. The north-south infrastructure within the province is, because of the islands-structure, not very well developed. Therefore north-south traffic within Zeeland is stimulated to use the highways as much as possible. The motorways making use of the bridges and dikes connecting the northern island 'Schouwen-Duiveland' with the peninsulas of Walcheren and Beveland have only 2*1 lanes. The connection between Zeeuws-Vlaanderen and the middle and north of Zeeland needs to be improved. However the Westerscheldetunnel, which is due to be opened in 2003, should mean that the southern and middle part of Zeeland will be closely connected and within 10 car-minutes reach.

Because of major investments in the Sloehaven (Deepsea Container Terminal) as well as the opening of the Westerscheldetunnel it is necessary to upgrade the road-infrastructure on both sides of this new tunnel. This will require an upgrading of the N254, which connects the Tunnel and Sloehaven with the highway A58. In Zeeuws-Vlaanderen the bridge over the Channel Gent-Terneuzen which connects the Westerscheldetunnel with the N253 not available for roadtraffic for 5 hours a day. Therefore, it should be replaced by the "Sluiskiltunnel". However so far the financing of this project is problematic.

Currently regular ½-hour ferry boat services, Vlissingen-Breskens and Kruiningen-Perkpolder, connect the peninsulas of Walcheren and South Beveland with Zeeuws-Vlaanderen. A tunnel under the Schelde River between Terneuzen and Ellewoutsdijk is under construction and is going to replace the function of the ferries. After the opening from this 'Westerscheldetunnel', the ferry Vlissingen-Breskens will only be accessible for small transport (passengers and (motor)bikes).

The international connection between the Randstad and the Southwest of the Netherlands and Belgium and France needs to be improved (for example the upgrading of the intersection between the highways A4 and A29 on the east side of Zeeland). However, an improvement of the road infrastructure between east and west and north and south will lead to an increasing pressure on the environment: traffic jams, affect the quality of life and are a threat on the value of the ecosystem.

Figure 3.1 Road infrastructure in the REGENSEA area

3.3 Port facilities and waterways

Waterways are not only a barrier within the REGENSEA area, but they are also an import part of the infrastructure in this region (figure 3.2). The presence of a number of important ports in the REGENSEA area strengthens the significance of the existing water infrastructure. Table 3.1 shows the transhipment of cargo in the ports of the REGENSEA area. It appears that in the port of Rotterdam the transportation of cargo is by far the most in the REGENSEA area (310 million tons).

In Suffolk the ports of Felixstowe, Ipswich and Lowestoft are important resources for the region. Felixstowe is the biggest container port in UK and the fourth largest in port in Europe and continues to grow rapidly. In 1997 17 million tons of cargo were transhipped in Felixstowe while 4.7 million tons were transhipped in Ipswich. Links to these ports are reasonable, but are likely to require further investment to accommodate future growth in port related traffic. Much of this investment may be outside the region (e.g. improvements to the A14, which links Felixstowe to central England, are urgently needed in the corridor between Cambridge and Huntingdon).

In Essex major ports are located at Tilbury, which is part of the Port of London in the Thames estuary and a major manufacturing and container port, and Harwich, which provides for both industrial and passenger traffic, mainly to and from Holland. In 1997 3.5 million tons of cargo were transhipped in Harwich. There are no figures available of Tilbury.

Five important waterways connect West Flanders to other regions by water: the Schelde-Rijn Channel (to the Netherlands), the channel from Gent to Ostend, the Zeeschelde-Bovenschelde, the ring canal of Gent and the Leie with the Afleidingskanaal (to France). There are two ports, one in Zeebrugge and one in Ostend. In 1997 the transportation of cargo amounted to respectively 32.4 and 4.28 million tons. In Zeebrugge the distribution of new cars next to the container terminal is a growing segment in the transhipment of cargo. To improve the transportation network in West Flanders, there are plans to improve the water- and railway infrastructure between the port of Zeebrugge and Ostend and the hinterland.

East Flanders possesses two major (parts of) seaports. The port of Gent is situated at both sides of the Channel from Gent to Terneuzen. After Antwerp and Zeebrugge, this port is the third most important port of transhipping cargo in Belgium (23 million tons in 1997). In Gent there are connections to road and rail transport. Waasland port is part of the port of Antwerp. The south part of the port is mainly used for the transfer of cargo. The north part of the port is formed by the manufacturing sector. The Waasland port has good infrastructure connections with other parts of the country and Europe. By road the port is accessible by the N49 and E17. The Schelde guarantees the inland navigation. Other important waterways are: the Schelde-Rijn Channel, Ringvaart Gent and the Leie with the Afleidingskanaal (connection with France), the Channel Gent-Terneuzen (connection with The Netherlands) and the Channel Gent-Ostend.

The province of South Holland (more specifically the Rotterdam area) is the centre of a number of major European waterways running from Germany, France, Belgium and Switzerland. Rotterdam is also the centre for container shipping. It is he largest seaport in Europe, handling about 310 million tons and 5 million containers a year. The most important industries in Rotterdam are refineries, chemicals, shipbuilding and –repairing and offshore, electronics, food and recycling. The 'Nieuwe Waterweg' connects Rotterdam to the North Sea. The Waal River is the major waterway between the Netherlands and Germany. The Haringvliet-Hollands Diep connects the North Sea with the river Waal via the Nieuwe Merwede. The Scheldt-Rhine Channel connects the port of Rotterdam with the port of Antwerp and the Amsterdam-Rhine Channel connects Rotterdam with Amsterdam. Other major waterways in the province of South Holland are the Gouwe (Rotterdam-Gouda-Alphen aan den Rijn) and the river Lek (Rotterdam-Utrecht). A barge terminal is located in Ridderkerk and Gorinchem. Another barge terminal is planned in Alphen a/d Rijn.

In Zeeland, there are two ports and various waterways. The ports are situated in Vlissingen (Sloehaven) and Terneuzen; together they form Zeeland Seaport. The transportation of cargo amounted to 26 million tons in 1997. Seaport Vlissingen and the port of Rotterdam have a strategic alliance. The Scheldt River (Westerschelde) is the most important waterway for the transportation of cargo in Zeeland. This river provides the connection between Belgium (Antwerp) and the North Sea. The Scheldt-Rhine Channel along the eastern border of Zeeland is the main connection between the port of Rotterdam and Antwerp. The Scheldt River will be deepened to increase the accessibility of Antwerp for huge vessels. This project will be completed after 2002. The Gent-Terneuzen Channel connects Gent with Terneuzen and the Scheldt. The Channel-through-Walcheren provides the connection from Vlissingen and Middelburg to the north. The Channel-through-South Beveland is a shortcut from the Scheldt to the waterways around Rotterdam.

Table 3.1 Transportation of cargo in ports (in million ton), 1997

Port	Solid bulk	Liquid bulk	Containers	Roll on/roll off	Other cargo	Total
Zeebrugge	4.1	5.1	7.6	14.7	0.8	32.4
Gent	18.0	1.8	0.2	1.2	1.8	23.0
Ostend	1.17	0.23	-	2.85	0.03	4.28
Zeeland Seaport	10.3	10.6	0.2	2.0	2.9	26.0
Rotterdam	91.3	140.6	58.3	10.0	10.0	310.1
Harwich	-	-	-	-	-	3.5
Tilbury[1)]	-	-	-	-	-	-
Felixstowe	-	0.1	21.9	6.5	0.4	28.9
Ipswich[2)]	-	-	-	-	-	4.7
Lowestoft[2)]						

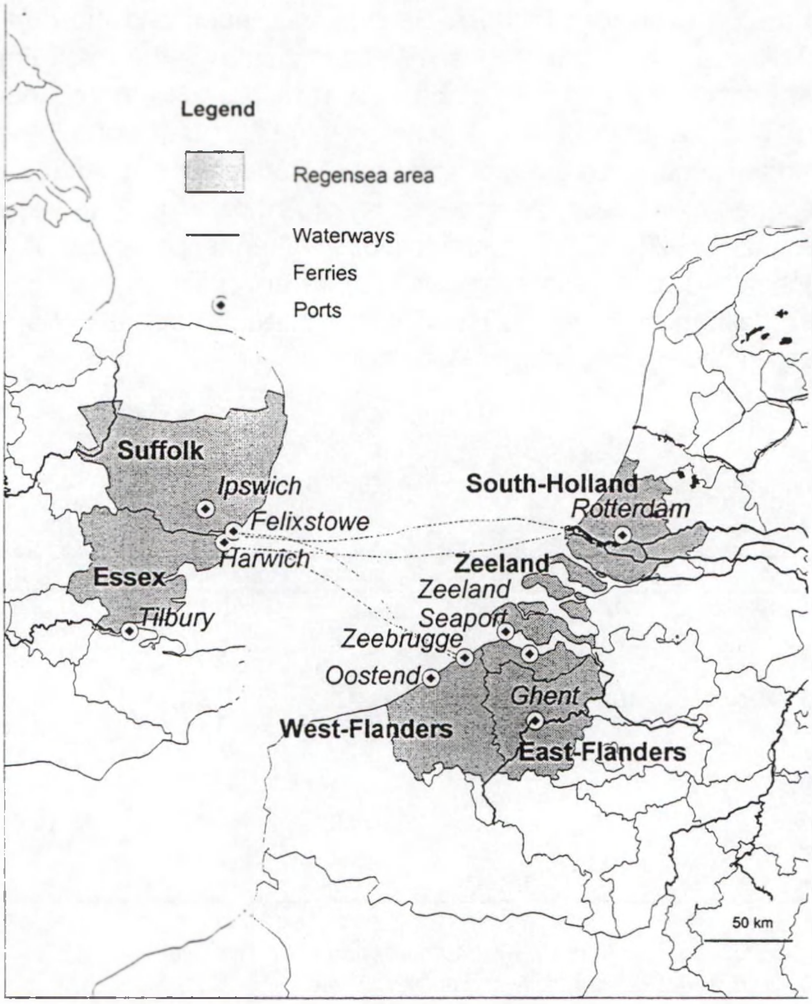
1) Has been requested from the Port Authority and not yet arrived
2) Has been requested from ABP and not yet arrived

Source: Euregion Scheldemond Interreg III program 2000-2006, GHR and the port of Ostend

As shown in table 3.1 the ports in the REGENSEA area play an important role with respect to the transportation of cargo. The concentration of ports has led to the development of logistic activities and a distribution function in these ports and adjacent areas.

Various ferries connect the regions within the REGENSEA area. These ferries are mainly used by tourists, because the timetables are not business orientated and the costs are relatively high. Also the connections between public transport and the ferries are not optimal, in particular the rail links to Felixstowe need to be improved. The ferries travel from Hoek van Holland (South Holland) to Felixstowe (Suffolk) and Harwich (Essex) and from Zeebrugge (West Flanders) to Felixstowe and Harwich.

Figure 3.2 Port facilities and waterways in the REGENSEA area



3.4 Railway infrastructure

The main rail connection between the REGENSEA partner regions in the United Kingdom and in Flanders is the Channel Tunnel, although this tunnel is not situated in the REGENSEA area. The Channel Tunnel offers the opportunity to travel from Brussels to London in 1 ¾ to 2 ½ hours and has a frequency of at least seven times a day. The journey from Rotterdam to London by train takes about 3 ¾ hours. Like the road infrastructure, the railway infrastructure is mainly focused on the metropolitan areas. The railway infrastructure within the REGENSEA area is shown in figure 3.3.

It is generally accepted that the rail infrastructure in the UK is not well developed and is in need of significant investment. This is equally true of Suffolk and Essex. In addition, the pattern of rail infrastructure in the region is also similar to that outlined for the roads earlier in this chapter with good links to London, used in particular by commuters, and extremely poor cross country links which does not promote rail travel within the region. For example, links between key urban areas in the region and key tourist destinations such as Ipswich, Chelmsford and Stansted, and Ipswich to Cambridge, are poor in comparison to routes such as London to Ipswich, via Chelmsford and Colchester. As well as the poor infrastructure and track standards the rail network in the UK is also suffering from under investment in services with many rural stations and branch lines suffering cutbacks in service frequency or services being cancelled.

However, there is potential for improvement to the rail network through initiatives such as Thameslink 2000, the Channel Tunnel Rail link which may have an impact on regional accessibility, and improvements to the Felixstowe to Peterborough line which are referred to in the emerging Regional Planning Guidance.

The railway infrastructure and passenger streams in Flanders are mainly concentrated on Brussels. International passenger connections are offered from Ostend, Brugge, Gent, Brussels, Leuven, and Luik to Cologne. Brussels and also Antwerp are connected to the high-speed train network (HST). The HST in Lille takes 35% of the passengers from Flanders. By Thalys people can travel three times a day from Ostend to Paris by Brugge, Gent and Brussels within 2 hours and 45 minutes. Although Brugge has direct international lines, it is not possible to travel directly by train from Brugge (or else in Flanders) to Zeeland in the Netherlands. There is only one bus line that crosses the border from Breskens to Brugge. Trains from Zeebrugge, Gent, Welteren, Aalst, Denderleeuw and Ath to Paris can transport cargo. In addition to the international connections there are also some stations that are important for national transportation: Brugge, Kortrijk, Ostend and Roeselare. The port of Zeebrugge has extensive opportunities for loading and unloading cargo at a rail terminal.

East Flanders' accessibility by rail is quite good. Main lines are:

- Ostend-Brugge-Gent-Brussel-Leuven-Luik-Keulen (passengers);
- Gent-Kortrijk-Rijssel (passengers and cargo);
- Zeebrugge-Gent-Welteren-Aalst-Denderleeuw-Ath-Paris (cargo);
- Antwerp-Gent (passengers).

In Gent there are also international connections by train but no direct links from Gent to Zeeland. Alongside the international railway connections, East Flanders has a number of intercity stations: Aalst, Gent-Sint-Pieters en Gent-Dampoort.

South Holland has international, national and local rail connections. The international lines are:

- Thalys: high speed connection between Amsterdam-Schiphol-Rotterdam-Antwerp-Brussels-Paris (5 times a day);
- Amsterdam-The Hague-Rotterdam-Antwerp and Brussels (hourly);

- Amsterdam-The Hague-Schiedam-Hoek van Holland (boat train to Harwich/London) (twice a day);
- A designated cargo rail track is projected in order to connect Rotterdam with the German hinterland (the so-called Betuwe Line).

Several less regular international rail connections are provided from The Hague and Rotterdam.

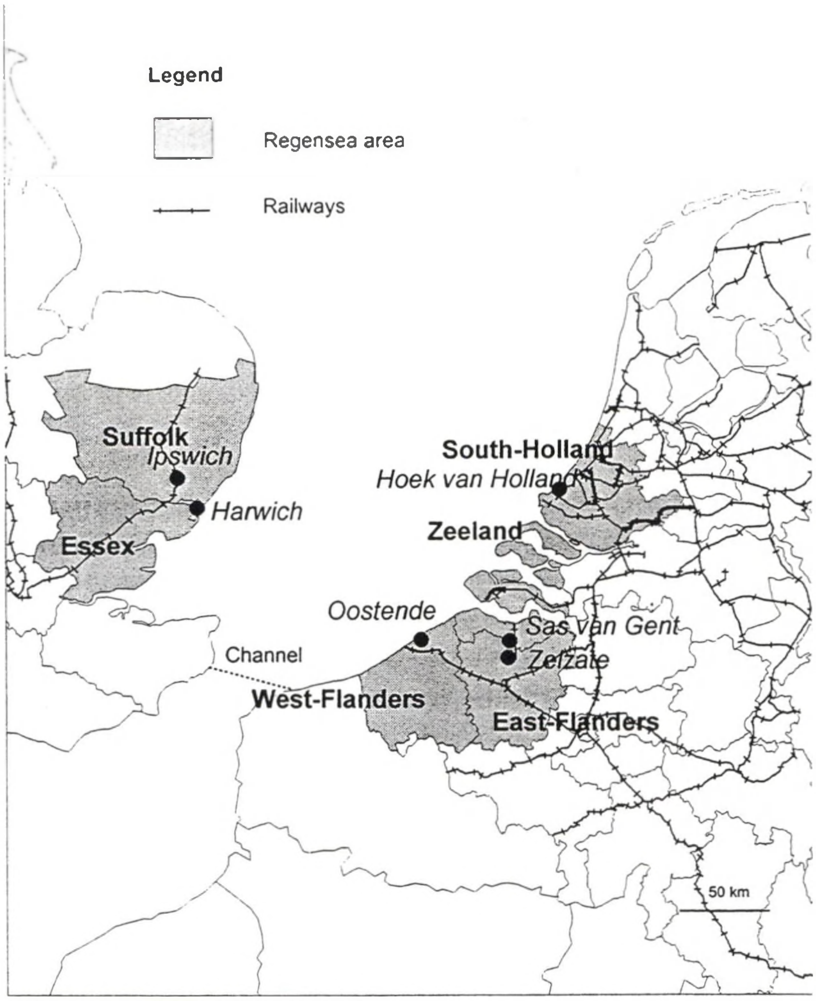
The national intercity lines are:

- Amsterdam City-Haarlem/Amsterdam Airport-Leiden-The Hague-Rotterdam-Dordrecht-Breda/Roosendaal-Vlissingen (twice an hour);
- The Hague-Rotterdam-Dordrecht-Breda-Eindhoven-Venlo/Roermond-Heerlen (twice an hour);
- The Hague/Rotterdam-Utrecht-Amersfoort-Deventer-Hengelo-Enschede (twice an hour);
- The Hague/Rotterdam-Utrecht-Zwolle (twice an hour)-Groningen/Leeuwarden (twice an hour);
- The Hague/Rotterdam-Utrecht-Arnhem-Nijmegen (twice an hour);
- The Hague-Leiden-Haarlem-Alkmaar-Hoorn (twice an hour).

There are several rail freight terminals with international connections in Rotterdam. An important freight line connects all the port areas of Rotterdam with the rest of the Netherlands and the rest of the European hinterland.

Direct international rail connections in Zeeland are missing. The international line Amsterdam-Rotterdam-Antwerp-Brussels passes Roosendaal (the province of Brabant) every hour. Vlissingen and Middelburg are connected with Roosendaal by intercity and local lines and have an hourly frequency. The intercity runs from Vlissingen-Middelbrug-Goes-Roosendaal-Rotterdam-The Hague to Amsterdam. Both ports of Zeeland Seaports have freight-lines that connect them with the hinterland. At present, rail cargo transport plays a minor role. An upgrading of the existing railinfrastructure ('Sloelijn' and 'Axel-Zelzate') is being investigated. For Zeeland it is also very important to realise a freight-shortcut to Antwerp and the 'IJzeren Rijn'. This freight-railline connects Antwerp with the German Ruhrarea.

Figure 3.3 Railway infrastructure within the REGENSEA area



3.5 Airports

In the REGENSEA area, there are three civil airports: Rotterdam (mainly passengers and cargo), Ostend (the largest freight airport in Flanders) and London Stansted Airport. The number of flights, passengers and freight are reported in table 3.2. It appears that London Stansted is by far the largest airport. Besides these three airports, there are a number of smaller airports within the REGENSEA area (figure 3.4).

There are two airports in Essex: London Stansted and Southend. London Stansted Airport is growing fast as London's third airport. In 1998 around 127,000 flights were made and 6.9 millions of passengers and 180,000 millions tonnes of freight were transported. Routes to the rest of UK and mainland Europe for both business and leisure travel are excellent. Other routes are less well established, although the KLM/Air UK link means that Stansted is an important feeder airport for Schiphol to inter-continental routes. At Southend Airport there are substantial development opportunities for both air travel and business space, but operations there are very small scale at present. There are no civil aviation airports in Suffolk.

There are two airports in West Flanders: Ostend and Kortrijk/Wevelgem. The airport of Ostend is mostly orientated at cargo, almost 88,000 million tonnes in 1998. Around 100,000 passengers were transported and almost 42,000 flights were made in 1998. As part of the global network of airfreight this airport is considered to be among the top 20 of European freight airports. There are few flights for tourists. The airport of Kortrijk/Wevelgem doesn't fulfil an important role in international transportation. There are no airports in the province of East Flanders. The international airport of Brussels (Zaventem) is the most important airport in Belgium. This airport is situated at around 100 kilometres from Brugge and 70 kilometres of Gent.

The development of Rotterdam airport has been substantial in recent years and has a good position as a regional business airport. This airport is mostly used for international charter flights. In 1998, a total of over 100,000 flights were made, while the annual number of passengers amounted to more than 600,000. Only 2.563 tonnes of freight were transported. Direct scheduled connections exist to Groningen Airport, Eindhoven Airport, Göteborg, London (Gatwick, Heathrow and City Airport), Birmingham, Manchester, Paris (Charles de Gaulle) and Hamburg. Schiphol Amsterdam International Airport is located at 74 km distance from Rotterdam Airport.

The province of Zeeland has only a very small airport (Airport of Arnemuiden) near Middelburg, which has a grass-landingstrip and is mainly used for recreational purposes. Rotterdam Airport is located at 115 km and Amsterdam Schiphol International Airport is at 175 km distance from Middelburg. In Belgium there are the airports of Antwerp at 85 km and the international airport of Brussels at 140 km distance from Middelburg.

Table 3.2 Number of flights, commercial passengers and freight (metric tonnes), 1998

Airport	Flights	Passengers	Freight (metric tonnes)
London Stansted	126,571	6,862,910	180,725
Ostend	41,702	106,672	87,868
Rotterdam	100,176	604,938	2,563

Source: Price Waterhouse Coopers, 1998

Figure 3.4 Airports within the REGENSEA area

3.6 Pipelines

In the Netherlands about 1,250 tons of water and 200 million tons of gasses, oil and chemical products are transported every year[9]. There are currently no national laws that regulate the construction of pipelines. For a start, a paragraph about pipelines has been inserted in the National Traffic and Transport Plan (1999). It seems that pipelines will get the same status as other infrastructure in the future. In the province of Zeeland the use of pipelines is growing and will continue to grow in the future. This is a good development because this way of transportation is good for the environment and strengthens Zeeland's position in the logistic network. Within the REGENSEA area there is a pipeline connection for gas between

[9] Province of Zeeland, pipelines Zeeland, 2000.

England, Zeebrugge, Sas van Gent and North Brabant (the Netherlands). It is possible that this network will be expanded in the future.

In Flanders, the pipeline infrastructure is quite weak and following the demand. The infrastructure of pipelines strongly resembles the spatial structure of the concentration areas of economic activities (the connection between the ports of Zeebrugge and Gent) and cities and regional concentration areas.

Information about pipeline systems in the UK is not available. Since it can be expected that further road congestion will stimulate the development of new alternative transport means, it is very important for the REGENSEA partners to develop an integrated approach to the construction of new pipeline. This will help to further strengthen the position of the REGENSEA area as a major 'transport region'.

3.7 Main conclusions with respect to transport and infrastructure

- ***Car use*** in the REGENSEA area is still increasing, especially in rural areas where public transport is less well developed. In urban areas the use of cars has also increased which leads to congestion and air pollution. In order to reduce the further increase of car use, it is necessary to promote and stimulate sustainable transport modes, both in passenger transport and freight transport. The tuning of different transport modes (road, water, rail and air) gives opportunities to develop a multi modal area.

- The tuning of cross-border and cross-sea ***public transport*** connections is not optimal. The railway infrastructure is mainly focused on the metropolitan areas and there is only one bus connection between West Flanders and Zeeland. In order to stimulate the co-operation within the REGENSEA area it should be useful to integrate public transport services and to improve public transport connections, particularly between the Belgian and Dutch regions. However, the ferries between the United Kingdom and Belgium/the Netherlands need attention as well. In addition, it should be investigated whether it is possible to integrate the public transport ticketing systems within the REGENSEA area.

- Although the mobility problems within the REGENSEA area show many cross-border similarities, a common ***(public) transport policy*** has not yet been developed. With respect to the construction of new cross-border/cross-sea infrastructure it is necessary to tune planning policies and procedures. The REGENSEA partners might benefit from exchange of information and experiences with respect to for instance:

  - promoting public transport and light rail systems;
  - car pooling;

- modal shift towards sustainable transport modes;
- the improvement of hinterland connections.

- The ***seaports*** within the REGENSEA area play an important role in the transportation of cargo. This mode of transportation will become more important because of increasing road congestion. Therefore the improvement of infrastructure between the ports and the improvement of inland connections is crucial in relation to the region's further development as an international multi modal transport region. The medium-sized seaports in the REGENSEA area offer good conditions for short sea shipping. These conditions may be further improved by introducing a network of short sea shipping ports in the REGENSEA area. In order to strengthen the position of the seaports in the REGENSEA area in an international context, it might be interesting to prepare a REGENSEA strategy with respect to the seaports and their connections. The opportunities for the improvement of sea-air connections should also be investigated, taking advantage of the airports and seaports that are located in the REGENSEA area.

- The ***railway infrastructure*** within the REGENSEA area has been mainly focused on the metropolitan areas. Large (rural) areas are not directly linked to the HST network. It should be investigated whether these connections can be improved.

- ***Pipelines*** could be a good alternative for the transportation of products. Within the REGENSEA area the chances for an integrated approach to the construction of cross-border/cross-sea pipelines and underground logistic systems should be investigated.

Chapter 4 **Economic structure**

In this section the economic structure of the REGENSEA area is analysed. The production structure, regional economic growth prospects and the availability business locations are considered in turn. The supporting statistical data can be found in table 2.1 (GDP among other things), the production structure is listed in table 4.1 and the availability of business locations is quoted in table 4.2.

4.1 Production structure

The production structure in the REGENSEA area is positively effected by excellent sea-, air-rail and road connections to the surrounding metropolitan area (see also chapter 3); especially the seaports of Gent, Waasland, Zeebrugge, Ostend, Terneuzen, Vlissingen, Rotterdam, Tilbury, Felixstowe and Harwich. Port-related economic activities have a large impact on the regional economy.

According to the regional economic strategy plan for Suffolk, key sectors are: agricultural & food processing, distribution, financial & business services, ICT, R & D, offshore industries, tourism and transport & communication. An important initiative for regional economic development is the attempt to promote the A14 corridor between Ipswich and Cambridge as a location for high tech investment. Cambridge has Europe's largest cluster of small, research intensive high tech firms, yet growth in the area is limited by environmental and infrastructure constraints. A further strength in Suffolk in this sector is the presence just outside Ipswich of BT's research facility at Adastral Park. However, the lack of a university for Suffolk may have an impact on the availability of appropriate skills in the local labour force.

In contrast, towns along the A14 in Suffolk, including Bury St Edmunds, Stowmarket and Ipswich, are designated for significant growth. This complementarily could be enhanced by investment in broadband telecommunications, which are not widely available anywhere in UK and would re-inforce the concept of a genuine communications corridor.

The economy of Essex is strongly affected by its proximity to London. 140,000 people per day commute into London from the county, particularly from the southern part (Thurrock, Basildon, Southend, etc). According to the regional economic strategy for the East of England, key sectors in Essex are: agricultural & food processing, automotive, chemicals, electronics, financial & business services, ICT, paper, printing & publishing, tourism and transport & communication. The main centres of research in the county include Essex University (strengths are mainly in social sciences, with limited economic spin off), Ford's European research centre, and pharmaceuticals research in Harlow. In addition, the main campus of Anglia Polytechnic University is located at Chelmsford.

Major centres of business activity in Suffolk and Essex that are focussed on services, port activities and manufacturing include:

- Southend, which has attracted a substantial amount of financial and business services, mainly 'back office' functions decentralising from London;
- Lakeside shopping centre, Thurrock, which attracts over 24 million people per year;
- Tilbury Port, which is now the main port for London as activity has moved downstream;
- Harwich, which is strongly dependent on port activity;
- Harlow, north of London on the M11 and close to Stansted airport, which has a variety of high value manufacturing activity, notably in pharmaceuticals;
- Colchester, Chelmsford and Ipswich, all of which act as administrative centres and have also attracted financial and business services.

Next to the above major centres of business activities two growth corridors are promoted within the REGENSEA area:

- A12/Great Eastern: strong employment base and industrial mix, concentration of higher education, available development land (Tendring), and good access to the ports and Stratford International Freight terminal;
- A13/A127/London-Tilbury-Southend: proximity to Thames Gateway development; focus on Business and financial services sector moving out of London; access to Tilbury port and Southend Airport; tourism potential.

In 1996 the regional production structure in the province of West Flanders was dominated by the service sector: 39% of all companies were registered in this sector. Within the service sector the tourism plays an important role. However, 40% of all employers are engaged in the manufacturing sector. In 1996 turnover in the sector of trade was the highest (40%). With respect to export figures 56 percent of manufacturing production is exported. Finally, manufacturing accounts for 33% of all investments. In 1996, 32,427 companies were registered in West Flanders. Of these, around 96% had less than 50 employers. The regional economy is clearly dominated by small and medium-sized enterprises. Several large companies in terms of turnover and employment that are located in West Flanders including Vamo Mills, Bekaert (metal industry), Basel West, Vandemoortele, New Holland Belgium (car industry), Picanol, Barco, Aldi, Clarck Equipment and Daikin Europe (manufacturing).

Traditional manufacturing activities (like metal, wood and textile industry) are concentrated in the North and Southeast (Kortrijk) of the province. The segment of small and medium sized companies, both in the manufacturing and service sector has shown a strong development. Port-related economic activities are important for West Flanders (see also chapter 3. Containers are the most important growth segment for the port of Zeebrugge. The port's inland connections are not very well developed and must be considered as a serious bottleneck. The same can be said about the possibilities to expand business activities in the port area: this is threatened by a shortage of business locations. Next to the port related developments the Flanders' language valley (high-tech sector) has a special growth potential.

In East Flanders, in 1996 the majority of companies were found in the services sector (32%). The largest share of employment (32%) and total turnover (44%) was also in the service sector. Export figures and investments are dominated by the manufacturing sector, which accounts respectively for 53% of total export and 39% of total investments. The bio-technological industry has a growth potential in East Flanders, starting with the centre of bio-technology in Gent. In this province 31,885 companies were registered in 1996 of which 96% had less than 50 employers: a similar pattern to West Flanders. Large companies in terms of turnover and employment that are located in East Flanders include Volvo Cars Europe, Sidmar, Volvo Europe Truck, Pioneer Electronic Industry, IMEWO, Belgomine, Callebaur, Honda Europe and Samsonite Europe.

The economic structure in both West and East Flanders is threatened by company relocations to border regions with EU subsidies, e.g. Henegouwen and the North of France.

The most important economic activities in South Holland are the Rotterdam port, the glass house industry, tourism and the services sector. About 40% of the businesses are in the service sector, while the sector of trade offers most employment (17%). The manufacturing sector has the highest export rate: 75% of the products are exported. The economic profile of South Holland is closely related to the international position of the Randstad Holland. Because of the high quality infrastructure and its strong position in the European distribution and logistics sector, a large number of sea- and airport related distribution companies and non-European multinational head offices are located in the Randstad. In the sector of business and financial services, the position of the Randstad is particularly strong in a number of specific types of services, like financial services in the trade and transport sector, accountancy, insurance companies, trade financing and technical services. In the Randstad Holland, Amsterdam is the centre for business services, Rotterdam has a strong position in the manufacturing sector, trade and the logistics sector and The Hague is the administrative centre of the Randstad. The ICT sector is concentrated in Amsterdam and Utrecht, although telecom companies concentrate in The Hague. Considering the knowledge economy South Holland is – in some respects - below national average. The research institutes, like the universities of Delft, Rotterdam and Leiden contribute to the knowledge development (e.g. Delfttechpark, Rotterdam brainpark and Bio Science park Leiden) while the businesses have lagged behind for this development.

The glass house industry in the Netherlands is still concentrated in South Holland. However, the share of South Holland has been reduced from 61% in 1992 to 58% in 1997. It is expected that the next ten years will see a further reduction to around 40% in 2010. Lack of space for the necessary increases in scale in the sector is the main reason behind this drop in share.

In 1996 the province of Zeeland had the following production structure. Most companies belong to the services sector (47%). Most employees work in the manufacturing sector (31%). The manufacturing sector is also on top with respect to turnover (47% of all turnover), export (84% of all export) and investment (40%). In Zeeland, the largest companies in terms of employment and turnover are Dow Chemicals, Hydro Agri, Cerestar (food sector), Hoechst Holland (chemical sector), Pechiney Nederland (aluminium sector), Philips Lighting, Morres Wonen, Prisma Food Kapelle, Total Raffinaderij and Neckermann. In 1996 a total of 18,218 businesses were registered in Zeeland of which 98% had less than 50 employers.

The coastal zones of all provinces in the REGENSEA area have to deal with the structural economic crisis in the fishing industry. Important common issues are the fishing quota of the EU and the competition of non-EU countries such as countries in Eastern Europe. In addition, West Flanders has to deal with the Dutch infiltration, an obsolete navy and a shortage of trained crew-members. Competition in the agricultural sector in the REGENSEA area is also increasing because of the developments in Eastern Europe and North Africa. Agricultural restructuring is causing severe problems in all REGENSEA regions. A common approach to these problems by the REGENSEA partners should be considered. This may contribute to finding solutions to these problems (e.g. stimulating increases in scale, introducing new economic activities, etcetera).

An overview of the production structure in the REGENSEA area is given in table 4.1. A direct comparison between the different countries can only be made between the Flemisch and Dutch regions, because the English figures are not complete and relate to a different year. This leads to the following conclusions:

- South Holland has the largest proportion of businesses and employment in the agricultural sector in comparison to East and West Flanders (figures of Zeeland are missing as well);
- East and West Flanders have by far the largest proportion of businesses and employment in the manufacturing industry. However, Zeeland has the largest part of turnover in the manufacturing industry;
- The proportion of businesses in the service industry in South Holland and Zeeland is larger than in East and West Flanders. However, the Flemish provinces offer much more employment in the service sector. It seems that the businesses in the service industry in Flanders are larger than the businesses in South Holland and Zeeland.

Table 4.1 Production structure 1996 in percentages (UK 1998)

Sector	Businesses	Employment	Turnover[1]	Export[1]	Investments[1]
Suffolk					
Agriculture and fishing	0,7	0,7	Na	Na	Na
Manufacturing	9,9	21,3	Na	43%[2]	Na
Building	10,8	4,7	Na	Na	Na
Trade	37,3	33,0	Na	15%[2]	Na
Services	41,4	40,2	Na	23%[2]	Na
Total	100,0	100,0	56%[3]	17%[2]	71%[4]
Essex					
Agriculture and fishing	0,3	0,4	Na	Na	Na
Manufacturing	9,8	16,7	Na	Na	Na
Building	13,5	5,5	Na	Na	Na
Trade	34,2	31,9	Na	Na	Na
Services	42,2	45,4	Na	Na	Na
Total	100,0	100,0	Na	Na	Na
West Flanders					
Agriculture and fishing	4,1	1,7	3,4	1,4	6,1
Manufacturing	15,0	39,7	35,2	56,4	33,1
Building	12,8	9,3	6,5	0,9	7,9
Trade	28,9	15,4	40,2	26,0	25,1
Services	39,2	33,9	14,7	15,3	27,7
Total	100,0	100,0	100,0	100,0	100,0
East Flanders					
Agriculture and fishing	3,6	1,4	1,7	0,7	3,4
Manufacturing	14,3	38,4	36,8	53,5	38,8
Building	14,4	10,9	7,1	1,1	10,6
Trade	31,2	16,9	43,6	38,3	22,9
Services	36,6	32,4	10,9	6,4	24,2
Total	100,0	100,0	100,0	100,0	100,0
South Holland					
Agriculture and fishing	10,7	2,1	Na	12,7	Na
Manufacturing	6,1	8,8	Na	74,9	Na
Building	8,0	5,4	Na	0,6	Na
Trade	35,0	17,3	Na	5,1	Na
Services	40,2	16,8	Na	6,7	Na
Total	100,0	100,0	Na	100,0	Na
Zeeland					
Agriculture and fishing		Not enough	Observations		
Manufacturing	7,5	31,0	47,3	84,2	39,6
Building	9,1	12,3	0,7	0,5	7,3
Trade	36,8	27,9	32,4	9,7	19,2
Services	46,7	28,7	13,1	5,6	34,0
Total	100,0	100,0	100,0	100,0	100,0

Na : not available

1) Million Euro

2) % of companies exporting

3) % of companies experiencing increase in turnover

4) % of companies undertaking investment

Source: Euregion Scheldemond Interreg III program 2000-2006; Annual Employment Survey, ONS, CBS

There is currently little economic integration within the REGENSEA area. However, economic relations between East and West Flanders and Zeeland have certainly been strengthened since the introduction of the Euregio Scheldemond. Co-operation, a joint marketing strategy and acquisition actions, in combination with the introduction of a new image for the REGENSEA area could provide new opportunities in the Europe of regions.

Finally, the impact of information and communication technology (ICT) developments on economic activities in the REGENSEA area needs to be considered. The REGENSEA partners should certainly pay interest to the impact of ICT development on the function of the seaports and on the port-related industry and on the tourist sector. These are important economic sectors in the REGENSEA area and it can be expected that, for instance, e-commerce will have a substantial impact on them.

At present, there is a lack of knowledge (especially on the transnational level) about the relationship between ICT and its influence on economic, social and cultural developments and on spatial planning and the use of space. Therefore two Intereg II project have started with reference to ICT developments: the SPECTRE (Spatial Planning and Emerging Communication Technology in the Regions of Europe) and the ERNACT project. The first is aimed at the development of a spatial planning guide, to increase the awareness of the potential of ICT and to develop a transnational spatial vision on the relationship between the developments in ICT and spatial planning. The latter is designed to test how and in what areas European regions could co-operate as a single “virtual region” irrespective of their geographical location in order to optimise their development potential in the new information-based era. The results of both projects could also be useful for the REGENSEA area.

4.2 Regional economic growth

Gross Domestic Product (GDP) gives an indication about the prosperity in the REGENSEA area (table 4.2).

Both Essex and Suffolk economies have growing faster than the national average since the late 1980s illustrated by the growth in GDP. Between 1987 and 1996 GDP per head in Suffolk increased by 6.5% and Essex by 6.7% compared to the national growth of 6.3%. However, Essex had GDP per head of Euro 14,672 in 1996, over 10% below regional and national averages (although this figure is affected by the number of residents who work in London, since GDP measurement is workplace based), Suffolk’s GDP per head of Euro 16,319 in 1996 was close to the regional and national averages, but well below average for NW Europe.

In contrast Gross Value Added per head in Essex was Euro 53,454 in 1997, compared with Euro 48,958 in Suffolk and UK and regional averages of Euro 52,703 and Euro 57,020 respectively. This in part reflects the higher level of industrialisation in Essex than in Suffolk.

In both counties the average hourly earnings is below national average, although in Essex earnings are higher than those of Suffolk and the regional average. Both have increased by similar amounts between 1993 and 1998, significantly lower rate than nationally.

In Flanders, the gross regional product per inhabitant was Euro 19,000 in 1995. The gross regional product per inhabitant in both West- and East Flanders was lower than the national average. West Flanders had a gross regional product of Euro 17,800 per inhabitant, while the gross regional product for East Flanders was Euro 17,000.

In 1995, the gross regional product per head in The Netherlands was Euro 20,500. The gross regional product in South Holland was higher (Euro 21,925) while the gross regional product in Zeeland was almost the same (Euro 20,400) as the national average.

Table 4.2 Gross domestic product within the REGENSEA area in Euro, 1995 (Flanders and the Netherlands) and 1996 (UK)

Province	GDP in Euro
Suffolk	16,319
Essex	14,672
West Flanders	17,800
East Flanders	17,000
South Holland	21,925
Zeeland	20,400

Source: Euregion Scheldemond Interreg III program 2000-2006, province South Holland, ONS

4.3 Business locations

In large parts of the REGENSEA area a substantial volume of business sites are – in principle - available (table 4.3). However, only a part can be developed immediately. There are no figures available for the English regions.

The Thames Gateway, stretching on the north bank of the river from inner east London to Southend, offers major potential for economic regeneration and housing development. However, much of the potential can only be realised after substantial expenditure on reclamation of derelict land (e.g. Shellhaven, Canvey Island) and improved infrastructure (e.g. on links to Southend airport and related land for commercial development).

At the end of 1998, the province of West Flanders faced a serious shortage of business locations. At that moment, the availability of business locations is limited to 107 ha. In September 1999 less than 600 ha new business locations were planned (but these are not yet available). It is expected that this will not meet forecast demand. At this moment there is already a shortage of business sites of 123 ha. Shortages of 213 ha (until 2003) and 485 ha (until 2008) are forecasted, without the development of new locations. The municipalities in the region of Gent together have 694 ha of business sites. Around 560 ha are used and 125 ha cannot be used at this moment (Evergem). The municipality of Gent has no more than 9 ha of business sites left as a reserve. In the province of East Flanders about 293 ha could be developed immediately in 1998, while there are still 1,727 ha of business sites left. In the past, businesses in Flanders have not always been located at the right business sites; therefore the segmentation of business sites is not optimal. With the introduction of the spatial structure plan in Flanders, it is expected that this will improve in the future.

Both in Zeeland and South Holland the sale of business sites has increased strongly in the last few years. In 1997 174 hectares of business sites were sold, while in 1998 351 ha of business sites were sold. In 1998 there was still about 1,000 ha of business sites available. The demand for business sites in South Holland is substantial, although relatively less than across the the rest of the Netherlands. In 1997, the province of Zeeland had in total around 4,000 ha of business location. Of this, 955 ha was still available (of which 875 ha could be used immediately).

The planning of business sites is until now primarily a regional and national issue. There is no international co-ordination with respect to the planning and development of business sites.

Table 4.3 Business sites in ha

Province	Gross area	Rest capacity	Emitting immediately
Suffolk	-	-	-
Essex	-	-	-
West Flanders (1998)	8,395	909	107
East Flanders (1998)	13,842	1,727	293
South Holland (1999)	9,280	1,064	351
Zeeland (1997)	4,013	955	875

Source: Euregion Scheldemond Interreg III program 2000-2006, province South Holland

4.4 Main conclusions with respect to the economic structure

- The ***production structure*** within the REGENSEA area is positively influenced by the excellent infrastructural connections to the metropolitan areas in the NWMA. Therefore this region should be promoted as an international infrastructure and logistics centre, with excellent sea-, air- rail and road connections.

- The seaports have an important impact on the ***regional economy***. Therefore the functioning and meaning of the seaports for the REGENSEA area must be protected and improved; the following issues need attention:
  - the connections of the seaports with the hinterland especially by rail and inland shipping;
  - the opportunities for short sea shipping;
  - the restructuring of the traditional port-related industry; promoting new economic activities in seaports (i.e. Value Added Logistics, tourism)
  - the negative impact of the Channel Tunnel on the international position of the ports in the REGENSEA;
  - the need for closer co-operation between the seaports (in relation to Rijn Schelde Delta project);
  - development of common initiatives with respect to education and exchange of information and experiences in the maritime sector.

- The ***economic structure*** within the REGENSEA area is to large extent based on the service sector, with a special role for the tourist industry. Also the agricultural sector plays an important role. Special provision should be made for the following activities:
  - Opportunities for co-operation with respect to high-tech development (i.e. Cambridge-Ipswich high-tech corridor, Flanders' language park, centre of bio-technology Gent, Delfttechpark, Rotterdam brainpark and Bio Science Park Leiden);
  - The development of the glass house industry, including new space needed for the further expansion of this sector, the position of the auctions (opportunities for co-operation, the impact of e-commerce), and exchange of information and experiences;
  - Restructuring processes in the agricultural sector: new economic activities in rural areas, relocation of farms, opportunities for new co-operation structures;
  - The perspectives for the development of new offshore activities (i.e. windmill parks);
  - Promoting new cross-sea co-operation structures between companies in general (i.e. with respect to innovations), stimulating cross-sea trade.

- The REGENSEA area is characterised by a large share of ***small and medium-sized enterprises***. SME's have a large impact on regional/economic growth figures. The need for a common strategy to stimulate the further development of the SME-sector should be investigated.

- There is a structural crisis in the ***fishing industry*** in the coastal zones of the REGENSEA area. *Therefore* a common redevelopment strategy should be considered, e.g. with respect to fish quota, fleet organisation and marketing. Special attention is needed for the labour market consequences of the economic crisis in the fishing sector. This crisis is having a negative impact on the labour market in all REGENSEA partner regions.

- There is a considerable amount of spare capacity in terms of ***business sites*** within the REGENSEA area (except for the UK regions). However, with the exception of Zeeland, most of the area cannot be immediately developed at once. In order to develop new locations for economic activities, it is important to prepare business sites. Also the opportunities for new cross-border business sites should be investigated.

- There are opportunities to increase trade between the REGENSEA partner regions, and to support and stimulate joint business ventures across boarders which would benefit from increased co-operation between the business support organisations in the REGENSEA partnership.

Chapter 5 **Labour market**

This section pays attention to the labour market in the REGENSEA area. First, the knowledge infrastructure is described; and then, the employment and unemployment structure in the REGENSEA area is discussed. Relevant statistics about the working population and unemployment rates have been summarised in table 5.1 and 5.2.

5.1 Knowledge infrastructure

The existence of research institutions and the co-operation between these institutions and companies is an essential factor with reference to technological changes and regional economic development. Several knowledge and research centres are located in the REGENSEA area. This is a pull factor for foreign companies who want to move or expand their business.

Essex has two universities: the University of Essex, located on the outskirts of Colchester, and the University of East Anglia, which has two main campuses, one in Chelmsford and the other in Cambridge. There are no universities in Suffolk at this moment, however there are some plans for a university in this county. In addition to English, all secondary schools teach French, and many also teach German and/or Spanish. However, in keeping with the whole of UK, few people in Suffolk or Essex, whether recently at school or older, would claim to speak any foreign language well.

The largest university in Flanders is the university of Gent, together with the university of Leuven. The university of Gent and many polytechnics in East Flanders attract many students also from other provinces in Flanders. In West Flanders (Kortrijk) there is one university (KULCK), a department of the University of Leuven and there are three polytechnics. There is also a European college in Brugge. The number of young people who attend university is below average in this province. This is caused by two factors. On the one hand many students visit a technological secondary school and do not visit the university after finishing this school. On the other hand, many students move outside West Flanders because of the little opportunities to study at the Kortrijk university. The education system in Flanders has an international orientation which means that most people speak French and English; German language is also taught at secondary school. Next to the universities there are a number of research centres: the centre of bio-technology in Gent and the Flanders language Valley in West Flanders.

The province of South Holland has three universities in Rotterdam, Delft and Leiden and a number of polytechnics. There are no universities in Zeeland and only one polytechnic. Zeeland is confronted with the same problem as West Flanders: students move to study at a university outside the province. In the Netherlands the education system has an international orientation English, French and German languages are taught at secondary school. Alongside the universities in South Holland, a number of technological centres have been established: they are mainly located in the brainpark in Rotterdam, the Bio Science Park in Leiden and the Delftechpark in Delft.

So far, there has been little co-operation between universities and polytechnics in the REGENSEA area. In the context of a labour market which is becomming more international, it seems to be worthwhile to investigate opportunities to strengthen this co-operation.

In terms of educational achievement progress towards the national targets in the UK which measure workforce qualification has been slow: By 1995, 42% of the workforce in Suffolk had achieved National Vocational Qualification (NVQ) level 3 compared to 50% nationally. Also over 50% of employers in Suffolk had provided training for their staff during 1997 and that 54% of the working population in Essex holds a vocational qualification. However, employers in both counties continue to state that their workforce's skills need to be improved. In 1997, 70% of employers in Suffolk believe that their managers need to improve their skills and 65% of employers that their non-managerial staff need to improve skills. The skills areas which are cited most commonly can be summarised as:

- Basic and transferable skills (e.g. literacy, numeracy, communications, IT and personal skills)
- Specific job related skills, including computer literacy, customer care, practical and technical skills.

5.2 Employment

Structure

The characteristics of the working population in the REGENSEA area are shown in table 5.1. The number of working people is expected to decrease in the future due to ageing of the population. This will lead to shortages on the labour market. In general there is a shortage of highly educated employers with a technical background. Employment in the manufacturing sector and port-related industry has decreased lately within the REGENSEA area.

Employment in the county of Suffolk increased by 1.4% to 202,000 between 1991 and 1995, compared to an increase of 1% in East Anglia. By 1998 employment in the county was over 400,000 amounting to 78% of the working age population. The largest increases were in the south-western parts of the county. Employment in Ipswich fell during this period and the coastal areas remained static. Employment in transport and distribution in Suffolk is particularly important and is partly linked to port activities at Felixstowe and Ipswich. Manufacturing accounts for 20% of all employees, significantly higher than the national average. Within this sector, food production is particularly important, but also subject to substantial declines in employment. Other vulnerable sectors include mechanical engineering and agriculture. The latter accounts for 3% of all employment in the county, with the number of jobs declining by 15% between 1991 and 1995.

In Essex,77% of the working age population is in employment, accounting for over 900,000 people. In the last 20 years there have been significant declines in employment in manufacturing, construction and public administration. In contrast, financial and business services have grown considerably. In Suffolk, agriculture accounts for a higher proportion of employment than in Essex but this is still less than 1%. A substantial number of high-educated people in both Suffolk and Essex work outside the REGENSEA area.

There were around 360,000 working people in West Flanders in 1998. In 1996 trade and services sector had the highest share of employment (62%). However, this share was smaller than the national average (66%). The share of employment in both the agricultural sector (5.5%) and the sector of trade and industry (32.5%) were higher than the national average (3% and 31%). About 86% of all employed people had a full time job in 1996.

The working population in East Flanders was around 400,000 people in 1998. East Flanders had the same structure of employment as West Flanders. The sector of trade and services accounted for 64%of employment in 1996 (compared to 66% in Flanders). The share of employment in the agricultural sector was 4% and in trade and industry was 31% (national average respectively 3% and 31%). In 1996, 86% of all employed people had a full time job. Since 1980, employment in the agricultural sector has decreased by 1.4% a year and the number of farms has decreased by 2.5% a year. In West and East Flanders, a substantial number of highly-educated people work outside the REGENSEA area. One of the reasons for this is the lack of highly skilled jobs in this province. Employment in East Flanders is concentrated in the regions of Gent (services and manufacturing), Aalst (rubber and food) and Sint-Niklaas (services and textile industry). These regions offer half of the employment in East Flanders. For the services sector it is even greater (60%). The remaining employment can be found in the regional towns (30%) and the rural areas (20%). Between 1991 and 1997 employment in East Flanders increased by 20%, mainly in the services sector. Employment in the manufacturing sector decreased by 20%, mainly in textile and clothing. Gent is the second largest industrial town in the district of Flanders.

The province of South Holland has, in terms of jobs, a number of strong, geographic clusters. These include the port- and manufacturing cluster, chemical complex, logistics and distribution knowledge and innovation, telecommunication, public government, agribusiness (greenhouse industry) and tourism. In 1997, agriculture covered the least employment (2%) while the services offered most jobs (59%). The manufacturing sector accounted for 12% of jobs, while the building industry had 8% and the sector of trade covered 19% of employment. Compared to the employment structure in the Netherlands, South Holland offers relatively more jobs in services (55% in the Netherlands) while the manufacturing sector is relatively less important for employment in this province (national average 17%). Between 1990 and 1997 employment in the manufacturing sector decreased by 2.9% a year, while employment in the services sector increased by 3.9%. However, the added value of the port of Rotterdam for the Dutch economy is very substantial. Every job in the port of Rotterdam results in four other jobs in other companies in the Netherlands. In 1999, the number of people employed in South Holland amounted to 1.4 million. Recent years have shown a turnaround in the growth of vacancies and the working population in South Holland. Since 1995, the number of jobs increased more than the size of the working population (except for Delft and the Westland). Especially in The Hague and the Rijnmond area the number of vacancies have grown strongly (a growth of 80% in 1997 comparing to 1996). Also temporary employment has grown rapidly since 1994. Until 1997 the temporary employment in South Holland was higher than the national average.

In 1997, there were around 160,000 people employed in Zeeland. In 1996, employment in the agricultural sector (5.7%) and in the trade and industrial sector (27%) was higher than the national average (3.8% and 23.2%). Compared to employment in Flanders, fewer people had a full time job; only 62%. Zeeland has a lack of highly skilled jobs, just like East Flanders. The recreation and tourism sector has developed itself as a fast growing sector with international exposure. The attractiveness with respect to foreign tourists is significant. Most employees in this sector work in the hotel and catering industry. The growth of employment in the hotel and catering industry is the great of all industries. In 1996 the sector of recreation and tourism had 13,000 jobs.

Table 5.1 Working population

Province	1991	1996	Growth
Suffolk	-	391,000	-
Essex	-	959,000	-
West Flanders	444,000	475,000	7.0%
East Flanders	558,000	587,000	5.2%
South Holland	1,255,000	1,321,000	5.3%
Zeeland	161,000	170,000	5.6%
REGENSEA	-	3,903,000	-

Source: Euregion Scheldemond Interreg III program 2000-2006, ONS and CBS

Mobility

Although there are no statistics available, it seems that in recent years, cross-sea mobility has significantly increased due to regional labour market shortages. A good example is the building industry: a substantial number of people from the UK are now working in building projects in South Holland.

The cross-border employment of people living in The Netherlands and working in East or West Flanders is very modest. In 1999, 1,275 Dutch people worked in East Flanders and 262 Dutch people worked in West Flanders. In 1999 only 1,231 people in East Flanders and

170 people in West Flanders were employed in The Netherlands. Most of the cross-border working population lives in the districts Sint-Niklaas, Gent, Eeklo and Brugge. The main reasons for the low cross-border employment seem to be the administrative and fiscal barriers. The recognition of diplomas within the REGENSEA area will stimulate cross-border employment and can contribute to an innovative, future-minded image of universities and polytechnics.

5.3 Unemployment

Unemployment in the REGENSEA area decreased in the last couple of years. The unemployment rates of 1991, 1993, 1995 and 1996 are given in table 5.2. Comparable employment rates after 1996 are not available, but it is likely that unemployment has been further reduced thanks to the economic growth that took place in this period.

Unemployment in both Essex and Suffolk has declined through the 1990s, in line with the national trend. In, Essex the unemployment rate has fallen from 7.6% in March 1995 to 3.1% in March 2000, which accounts for 21,901 people. This is a greater decline than the national average which fell from 9.8% to 5.4% over the same period. In Suffolk the unemployment rate is lower overall and has declined from 6.2% in 1996 to 2.9% (9,728 people) in March 2000, well below the national average of 4%.

There is a higher rate of unemployment amongst males in both counties, mirroring the national trend with female unemployment as low as 1.7% in Essex and 1.5% in Suffolk in March 2000 compared to the national rate of 1.9%.

However, whilst labour shortages are constraining growth of businesses in parts of the counties, there are also pockets of high unemployment and social exclusion. In Suffolk this is most notable in central Ipswich and Lowestoft and the main focus of unemployment and social deprivation in Essex is the coastal towns of Southend, Clacton and Harwich. Half the unemployed people in south Essex have no NVQ or equivalent qualifications, suggesting that there may be intractable problems of long term unemployment unless education and training delivery is improved. Over 20% of the unemployed in both Essex and Suffolk in March 2000 had been unemployed for over a year. This accounts for 4,585 and 2,104 people.

In 1996 the unemployment rate in West Flanders (5.5%) was lower than the average Flemish unemployment rate (7.1%). Until 1996 unemployment in West Flanders increased. In contrast in the period 1996 to 1998 the absolute number of unemployment decreased from around 40,000 people to 33,000 people. In 1998, 47% of registered unemployed people were unemployed for more than one year, 25% were younger than 26 year old and the majority (62%) were female.

Unemployment in East Flanders decreased by 14% between 1998 and 1996. In 1998 there were around 53,000 people looking for a job in contrast to 61,600 people in 1996. The unemployment rate in East Flanders was 7.2% in 1996, almost as high as the national unemployment rate in Flanders. Looking at the kind of registered unemployment 55% of the unemployed people were unemployed for over one year, 26% were younger than 25 years and 58% were female.

In 1996, unemployment in South Holland (7.5%) was higher than the national average (6.2%). Most people who found a job between 1994 and 1997 had a secondary or higher education diploma or university degree. The decrease in the unemployment rate of lower skilled people lags behind the comparable national average. In 1998 about 53% of the registered unemployed were women and 27% were younger than 25 years.

The rate of unemployment in Zeeland (5.7%) was lower than the national average (6.2%) in 1996. Of all registered unemployed people, 51% was had been unemployed for more than one year, 24% were younger than 27 years and 51% were female. In 1998 around 10,700 people were registered as unemployed and there were 13,000 unemployed people in 1996. This means that the unemployment decreased by 17.3% between 1996 and 1998.

Table 5.2 Unemployment in percentages

Province	1991	1993	1995	1996
Suffolk	-	-	-	5.7
Essex	-	-	-	6.0
West Flanders	3.8	5.3	5.3	5.5
East Flanders	4.8	6.4	6.8	7.2
South Holland	6.2	7.4	7.8	7.6
Zeeland	5.3	9.1	6.8	5.6
REGENSEA average	-	-	-	6.3

Source: Euregion Scheldemond Interreg III program 2000-2006, ONS and CBS

5.4 Main conclusions with respect to the labour market

- The REGENSEA area has a good ***knowledge infrastructure***. There are several universities and knowledge centres and there are many polytechnics. However, Zeeland and Suffolk do not have a university. At this moment the co-operation between the universities and polytechnics within the REGENSEA area only takes place on a modest scale. The possibility of increasing this should be reached. In order to initiate new international networks in different sectors of the economy (see also chapter 4), attention should also be paid to the introduction of international business training and education programmes, in close co-operation with the market sector and universities.

- The REGENSEA area is characterised by a large share of small and medium-sized enterprises (see also chapter 4). Regional employment is also concentrated in the SME's. The present problems of SME's on the labour market, due to for instance the shortage of highly educated employees with a technical background might be solved by a REGENSEA approach. The present ***shortages in the labour market*** ask for new initiatives to stimulate jobless people to enter the labour market again. Perhaps the REGENSEA partner regions can learn from each other: best practices, successful projects etc.

- Some of the port towns face a ***reduction of low-skilled labour*** in traditional industries (port related and manufacturing industry). It is feared that this will lead to unemployment for the low-skilled labour force. A joint approach may contribute to a solution for this problem.

- One of the characteristics of the REGENSEA labour market is the fact that highly skilled jobs are mostly offered in urban areas. In addition, a substantial number of highly-educated people living in the REGENSEA area commutes to the ***surrounding metropolitan regions***. Since the REGENSEA partner regions face shortages on the labour market their selves, it will be important to consider initiatives to reverse this trend. Again, it might be interesting for the REGENSEA partner regions to develop a joint approach with respect to this topic.

- International cross-border/cross-sea labour mobility seems to be increasing. Since there are still juridical barriers to international labour mobility, this issue needs full attention of the REGENSEA partners.

Chapter 6 Environment

In this chapter the environmental quality and the environmental problems within the RE-GENSEA area are described.

6.1 Environmental quality

In general Suffolk has a very high quality environment. It has substantial areas of attractive (if unspectacular) countryside and beautiful small towns and villages. There are many historic buildings, and the churches of Suffolk are a major national asset (reflecting a rich agricultural heritage). There are over 28,000 ha of woodland, amounting to 7.4% of county's land and inland water area. The natural habitat is rich and diverse. Air quality is generally good.

The quality of the environment in Essex varies greatly. The natural landscape strongly influences the rural environment, with pleasant rolling countryside in the north and flat rather featureless areas and river floodplain to the south. There are currently 16 country parks in the county totalling 1,400 ha, the two largest being Epping Forest and Hatfield Forest which attract visitors from Essex and in particular London. The urban areas also vary greatly in quality, ranging from beautiful villages to run down inner urban areas and extensive industrial dereliction. In the south of the county mineral extraction and waste disposal through landfill are also important features, which detract from environmental quality.

The natural environment in West Flanders is diverse. There are many historical villages, woods, pastures and a large coastal area with dunes and dikes. West Flanders has, like East Flanders and Zeeland, a valuable creek area with a beautiful cross-border nature and landscape. This also makes the area attractive for tourism and recreation. The main land of the creek area is used for agriculture. Therefore a healthy agricultural climate is essential for the quality of this area.

The environmental structure of East Flanders is diverse. The creek area and the Schelde polder form a flat and open nature area. In the sand area pine forests can be found. There are also some river valleys and part of the Flemish Ardennes is located in East Flanders.

Behind the coastal dunes of South Holland are large stretches of polders and peat areas. Although the province itself is densely populated and the land use is intense, many sites of historical and ecological interest still remain. The province is famous for its dikes and old windmills, its vast pastureland with flocks of meadow birds (Green Hart), and its old coastal sand dunes. Certain industries have been concentrated, like the glass house industry in the Westland. This makes it easier for the government to develop a regional environmental plan with specific actions.

Zeeland on the other hand is largely a rural area, and is sparsely populated. The province is built up of former islands in the delta of the rivers Rhine, Meuse and Scheldt. Some estuaries were cut-off from the sea recently (Delta Project) for safety reasons and turned into shallow lakes and marshes. Behind the coastal sand dunes, delta dikes and salt marshes are innumerable polders. Here agriculture is the most important landuse. The dikes and creeks are nowadays important nature reserves. Industrial activity is restricted to the ports of Vlissingen and Terneuzen. Recreation is an important economic sector, particularly along the coastline.

In general the awareness of environment and has nature increased as sustainable development is getting more attention form different policies in each of the REGENSEA regions. The synergy between environment and economy is getting stronger as more environmental healthy production methods are implemented. A good example is the production of environmental friendly wind energy that is getting more and more attention in all countries. The open rural areas in the REGENSEA area form a good environment for the generation of wind energy. However, South Holland has a strong policy concerning the implementation of wind mills. Whereas Zeeland has already started projects with wind mills, Flanders has started an orientation process. Therefore it is important to exchange information and experiences within the REGENSEA area.

6.2 Environmental problems

It is axiomatic that environmental issues with respect to coastal zones and marine issues do not respect local authority or member state boundaries. An alternative approach to planning and managing the coastal zone is needed to tackle issues common to all parts of the coastal zone. Therefore the SAIL project has been initiated (see also chapter 1) as an IntereglIc project. The results of the SAIL project should be integrated within the REGENSEA area project.

General (coastal) problems within the REGENSEA area are:

- the pressure on fragile ecosystems from development, coastal erosion and impact of tourism and recreation on the coastal zones (i.e. waste);
- the pollution as a result of the industrial areas like seaports, oil spills, coastal and maritime litter and sewage;
- the exploitation of natural resources, notably fish and shellfish;

- the noise pollution by different causes like planes and other vehicles and industrial sites;
- the relatively bad quality of the water in the North Sea;
- the overpopulation in the metropolitan areas that increases the pressure of building in the rural areas nearby the urban areas;
- the rising of sea levels, tidal surges and the changing frequency and severity of storms as a result of the greenhouse effect.

The protection of the environment is an issue that typically needs an international approach. A cross-border and cross-sea approach to protect the environment in the REGENSEA area can contribute to a successful environmental policy.

In Suffolk there are a number of environmental issues. The area is the driest in UK, and water resources are under increasing pressure due to population and economic growth. Land quality is threatened by agri-intensification, and much of the coast is environmentally sensitive, and cannot readily accommodate a substantial increase in visitor numbers.

Much of the coastal fringe in Essex is sensitive environmentally, with some very important wetlands along the estuaries of the Thames, Crouch, Chelmer/Blackwater and Stour. Along the Thames in particular some of these areas have been seriously compromised by manufacturing and port related developments.

The environmental problems of the province of West of Flanders are mainly related to water. The water level in polder areas is maintained for agricultural purposes. That is why nature areas lose their value or are hindered in their development. Other problems are the dumping of household effluent on the surface water and the damage to the maritime environment as a result of the fishing techniques used. There is also a problem related to agriculture: too much animal manure.

There are various environmental issues in East Flanders. The open area is getting smaller in favour of housing and industrial areas. The open area has also become fragmented as a result of building in ribbons and the implementation of large infrastructure projects. Nevertheless, the area of nature reserves increased from 240 ha in 1980 to 1500 ha in 1998, but it is not certain that this development will continue. This Flemish province has smallest area of nature reserves of all Flanders. There are 15,000 ha of forest area in East Flanders: less than in other provinces. By planting poplars this forest area will be extended over the next ten years. Most of the forest is privately owned; the government owns only 12%. Another development in East Flanders is the expansion within the agricultural sector and the reduction of agriculture area. Farmers are trying to get the same production from a smaller plot. Therefore the flora and fauna are negatively affected. The amount of agricultural land is influenced by the development of business sites.

South Holland faces environmental problems associated with a densely populated urban area such as pollution by manufacturing, traffic, greeneries and effluent. Rural areas have to cope with environmental problems that are caused by the cultivation of flower bulbs and the glass house industry. Special areas that get attention for the prevention of environmental problems are De Venen, Kop van Goeree, Leidse Regio, Krimpenerwaard, Hollandse IJssel, Stadsregio Rotterdam en de Duin- en Bollenstreek. Although some environmental problems are under control other problems tend to aggravate, notably eutrophication of the surface water. For the period 2000-2004 the province of South Holland has made a policy plan with reference to the environment and water. With this plan environmental problems should be prevented instead of controlled and cleaned up afterwards.

The environmental problems in Zeeland are associated with agriculture (desiccation, pesticides, eutrophication of lakes and ditches), manufacturing (air pollution) and recreation (waste and water shortage). Also the coastal zone has been damaged by the existing fishing techniques and too much fishing. In order to address the environmental problems Zeeland has introduced a policy document (werk in uitvoering).

The national government of the Netherlands is currently investigating the opportunity to develop a new airport in the North Sea. So far, no decisions have been made. But if they decide to do so, the environment in the REGENSEA area needs full attention.

In the Netherlands different initiatives prevent or reduce the environmental problems:

- the Dutch ports have good waste collecting services for ships. This is called the Haven Ontvangst Installaties (HOI). However, because of the high costs that have to be paid for these services, ships are fleeing to other ports like Antwerp or dumping their waste into the sea. Another way of financing these services might stop these threats;
- The Delta is well cleaned by dredging on a regular basis. Afterwards the dredge is processed in an environmentally friendly way;
- There are (national) meetings with the hinterland, like Germany. Even arrangements have been made to decrease the pollution. Another advantage is that the hinterland remains accessible;
- There are also meetings on a regularly basis between the government and industries. The meetings are basically meant to inform different parties and can contribute to a good understanding of the wishes of the parties;
- The quality of sea water and attractiveness of the beaches are stimulated by the fact that there are no direct drainings from sewer systems.

As shown in chapter 4 agriculture and fishing are quite important in the REGENSEA area. In order to minimalize the influence of agriculture on the environment it will be necessary to reconstruct the agricultural and fishing industry based at the principles of sustainability.

6.3 Main conclusion with respect to the environment

- The ***environmental quality*** of the REGENSEA area has international significance in terms of the attractiveness of the REGENSEA area for tourists. There are many beautiful small towns and villages, a large rural area, woods, creek areas and a large coastal zone with dunes and dikes. Awareness of the environment and nature is getting stronger as sustainable development is getting more attention in regional and national policies.

- ***Water*** is a very important element in the REGENSEA area, linking the regions to each other. International water management seems to be one of the cornerstones of environmental policies for the REGENSEA-area. Opportunities for cross-border/cross-sea co-operation with respect to water management should be investigated.

- Various ***initiatives*** have already been undertaken with respect to integrated coastal management (nature, tourism and ports). These initiatives should preferably lead to a structural co-operation of the REGENSEA partner regions.

- Many ***environmental problems*** typically need an international approach. Some issues are increasingly dealt with on EU-scale or world-wide (i.e. reduction of CO_2 emissions, protection of wild life). Other environmental issues need to be dealt with on a regional scale, like the:
  - negative impact on the environment of some fishing techniques and too much fishing in parts of the North Sea;
  - pressure on fragile ecosystems from development, coastal erosion and impact of tourism and recreation on the coastal zones (i.e. waste);
  - pollution as a result of industrial activities in seaports, oil spills, coastal and maritime litter and sewage;
  - exploitation of natural resources, notably fish and shellfish;
  - noise pollution by different causes like airplanes, other vehicles and industrial sites;
  - poor quality of the water in the North Sea;
  - overpopulation in the metropolitan areas that increases the pressure of building in the rural areas nearby the urban areas;
  - rising sea levels, tidal surges and the changing frequency and severity of storms as a result of the greenhouse effect.

- In order to ***prevent or decrease*** the environmental problems it is necessary to exchange information and experiences on various issues, including:
  - development of new cross-border nature areas;
  - sustainable agriculture;
  - sustainable development of new business locations and redevelopment of existing locations;
  - windmill energy parks;
  - protection/management of valuable rural areas that are 'threatened' by urban expansions;
  - environmentally friendly entrepreneurship.

Chapter 7 **Tourism**

This final chapter of the social-economic analysis describes the tourist industry, the main tourist attractions and provide a broad profile of tourism in the REGENSEA area. Table 7.1 shows the capacity of lodges and number of nights that were booked in hotels in the REGENSEA area in 1996.

7.1 Tourist industry

Over recent years, tourist attractions are becoming more global, professional and larger in scale. The behaviour of tourists is changing and the market for leisure activities and tourist attractions is growing. People are seeking more active (short) holidays, more diversity and quality surroundings. Tourists are also increasingly experienced, critical and individual. These changes result in demand for more quality (for the same amount of money) and a shortening of the product cycle of tourist products. Coastal zones and cities are especially attractive for tourists.

As mentioned in chapter 4 and 5 the tourist industry is important for the economy in the REGENSEA area and across Europe more generally. Therefore an important objective of EU policy is to maintain and stimulate employment in the tourist industry. But the tourist industry is also important for four other reasons: the industry is labour intensive and of little burden to the environment, there are few economic alternatives in the tourist areas; it generates employment for underprivileged people in the labour market and its relationship with other functions is becoming more important. Next to the importance of employment in the tourist industry other objectives have been relevant like the importance of welfare and quality of life for the inhabitants and the maintenance of services such as sport, culture, health care and retail trade.

As shown above, a lot of information about the tourism industry has not been collected yet. Therefore more information should be gathered in order to define opportunities for cooperation within the REGENSEA area. The following issues should be analysed:

- The economic importance of tourism in the concerned regions reflecting the diverse types of tourism (i.e. water, cultural, agro- and cycling tourism);
- The tourist related industry;

- The relationship between tourism and professional training;
- The impact of short-term holidays for the tourism sector in all regions;
- Regional and international trends with reference to more qualitative or high-standard holidays;
- An identification of all actors in the promotion of tourism in the concerned regions;
- An identification of all actors that are active in the product development in the concerned regions;
- An overview of the existing networks within the tourist industry in the provinces;
- An overview of the quality standards in the concerned regions;
- An overview of the existing booking-systems in the concerned areas;
- An analysis of the procedures for booking overnight stays and special events;
- Identification of cultural events and an analysis about their impact on tourism.

7.2 Tourist attractions

Tourism is an increasingly important sector for Suffolk. In recognition of the potential offered by the high environmental quality of the countryside, villages and market towns of Suffolk, the county has recently sought to increase tourism facilities and promotion of the area through the Suffolk Tourism Strategy. The Strategy recognises the need to promote the area as a tourist destination and build on existing facilities through initiatives such as Lowestoft and Felixstowe resort regeneration initiatives, the National Trust development at Sutton Hoo and promoting attractions such as the Abbey of St Edmund at Bury St Edmund. To achieve this the county will need to develop and encourage investment in accommodation provision to attract different tourist markets from camping to quality hotels and extend the season by extending provision for short break holidays and developing the 'environmental tourism' market, e.g. making the most of the over 5,000KM of public rights of way in the County.

Essex was a traditional tourism destination, particularly for east London residents. The main resorts of Southend and Clacton, and other areas such as Canvey Island, provided low cost facilities and attractions, which are also generally low quality. This type of tourism has declined dramatically, whereas short break holidays in the more attractive small villages and towns in north and east Essex has grown. In the future growth sectors in the county are likely to include tourism for the elderly and for young families, sustainable tourism, short break and day trips and visitors from Northern Europe.

West and East Flanders have been divided in different tourist areas and products. The Leie area is a cross tourist region in both West en East Flanders. The coastal zone, the Westhoek, Brugs Ommeland and Southeast Flanders, forms West Flanders. In the province of East-Flanders five different tourist areas are defined: Gent and surroundings, Waasland, Schelde- and Denderarea, Flemish Ardennes and Meetjesland. These areas are characterised by open and green landscapes, water, nature and rest. As a result, tourist attractions in both West and East Flanders are mainly based on walking, cycling and cultural day-trips in the cities. There are possibilities for developing provincial water routes, maybe together with cycle routes. Also the coastal area is attractive for tourists. In addition to the coastal zone, historical towns like Brugge en Gent are important attractions. In East Flanders also the Flemish Ardennes and the rivers Schelde en Dender are popular tourist places for one-day tourism and short holidays. Both in West and East Flanders various attraction parks are situated: Recreationpark the Brielmeersen (East Flanders) and the Boudewijnpark, Popsaland, a butterfly garden and a Sea Life in West Flanders in West Flanders.

The province of South Holland has three different tourist attractions. The most important attraction is the coast both for domestic and foreign tourists. In the coastal zone there are nature and rural areas, water mills, polders, lakes and dunes. The second attraction, including culture history, art and culture, cities, festivals and events. There are many cultural and historical towns and cities, like The Hague as province town and political centre, Rotterdam as the largest city with a world port and Leiden en Delft with historical buildings, museums and canals. There are 13 large museums in this province that welcome each over 100,000 visitors a year. Other attractions are the Kunsthal in Rotterdam with 300,000 visitors in 1998, the renewal of the Ahoy stadium in Rotterdam as an event centre and a couple of attraction parks (Diergaarde Blijdorp, Duinrell, Madurodam and Lisse Keukenhof). The third type of tourist attractions is the flowers and bulbs appeal to foreign tourists. A trend in South Holland is the increased importance of business tourism. Half of the international congresses in the Netherlands takes place in this province. This development is stimulated by the presence of the Rotterdam airport, the international railway connection to Paris and Brussels and the ferry to the United Kingdom.

In Zeeland the tourism and recreation sector is characterised by rest, space, a green surrounding and water, the relatively safe surrounding, the presence of cultural and historical towns, the opportunities for rural tourism and the situation by the new Waterway. This sector has to deal with increasing competition from other region in other countries with an increasing demand for quality and new forms of spending free time. Because of these changes in demand the quality in this sector must be improved, the sector should become more professional, the products have to be widened, renewed and scaled up and the season should be extended in Zeeland. Furthermore more attention should be paid to customers and customer services. More opportunities for this sector are offered by dealing with these aspects and creating a mutual network between businesses within and outside the tourist sector. There are also five medium-sized attraction parks: the Arsenaal, the Boudewijnpark, the Miniatuur Walcheren, Route 49 and a butterfly garden.

Within the REGENSEA area there is a great range of tourist attractions and also internationally known cities are situated nearby such as London, Amsterdam, Brussels and Antwerp. At the moment the REGENSEA area is not seen as one tourist region and there is no co-operation to offer tourist attractions in different countries. There is a strong competition between cities and the coastal zones within and between the provinces and between different businesses. On one hand this will stimulate better results. On the other hand this makes it difficult to co-operate between different parties and different provinces. Especially in this new economy where the use of Internet and e-commerce increases every day, this represents a great opportunity for co-operation within the REGENSEA area: for example to promote attractions, to create a common internet page or to integrate a ticket and reservation system. Transnational co-operation is useful for three reasons:

- It might address cross-border issues;
- Learning from each other by co-operation on certain issues;
- Advantages of scale by co-operation, the bundling of financial means and cost reduction. On the one hand this can lead to the development of new products (with an international exposure) like arrangements for coast and city tourism, industrial tourism, business tourism, out-of-season activities, cultural and sport events and the transformation of economic activities into tourist attractions (like the flower auction in South Holland). On the other hand this can lead to new markets (like the Ruhr area as an important area of origin of tourists at the coastal zones in West Flanders or Zeeland).

As mentioned in chapter 3, the ferries that connect the regions within the REGENSEA are mainly used by tourists. The connections between public transport and the ferries are not yet optimal. In order to stimulate the local economy in the port towns (Hoek van Holland, Felixstowe, Harwich and Zeebrugge) more tourists should be attracted and kept in these towns for at least one day. Therefore new attractions should be created in the port towns and public transport to other tourist attractions in the REGENSEA area should be improved. Also the Channel Tunnel stimulates the tourist industry within the REGENSEA area.

Finally, two issues also need to be analysed:

- The analysis of the tourist products that have been developed in the concerned provinces;
- The importance of business/congress tourism and cruise tourism in the different provinces.

7.3 Tourists

Between 1989 and 1996 the number of domestic visitors to the Suffolk area (i.e. from else where in the UK) increased by 16% to 1.4 million resulting in an increase in value of over 39% to £155 million in 1996. The number of overseas visitors ***increased*** by 21%. Although the numbers are still relatively small (0.17 million) overseas visitors accounted for £58 million in 1996 and an average spend of £342. Over 50% of the total expenditure was in Barergh, Forest Heath, Suffolk Coastal and Waveney districts. Business visitors were particularly important for Ipswich and Bury St Edmunds.

Over the 1990s, Essex experienced an increase in tourist numbers. This is reflected in the economic value of tourism to the county. In 1998 expenditure by domestic tourists was Euro271 million, an increase of 46% since 1989 and comparable with growth in Suffolk. Expenditure by overseas tourists has also increased by 67% to Euro143 million.

In West and East Flanders and Zeeland, most overnight stays occur in the coastal zones and the cities in the hinterland. The number of tourists and trips for one day or a short break stabilises or decreases. East Flanders had around 35,000 lodges in 1996 and 1.2 million overnight stays. Half of the overnight stays were domestic while the other half of overnight stays were made by foreign people (8% from Germany and 13% from the Netherlands). Around 66% of the lodges was situated at campsites.

West Flanders registered around 18 million overnight stays and almost 523.000 lodges. Of all overnight stay the Belgium inhabitants accounted for 13.4 million nights (circa 75%). The other 4.7 million nights were made by foreign people, only 7% by Dutch people.

In 1996 in Zeeland tourists spent Euro 726 million and 17 million overnight stays were registered. Dutch tourists booked around 10.5 million nights (60%). Foreign tourists made the other 6.5 million nights, whereas German people booked 33%. There were around 283,000 lodges in Zeeland, whereas over 50% of the lodges were at campsites and 4% on a farm.

Comparing the overnight stays between Flanders and the Netherlands, it is remarkable that there are no lodges at farmers in Flanders while 4% of the lodges in Zeeland are at farmers. The development of these lodges could be an opportunity for Flanders.

Table 7.1 Capacity of lodges and number of nights (millions) in 1996

Province	Capacity of lodges	Number of nights of own country	Number of nights of foreign countries	Number of nights in total
Suffolk	-	4.7	1.7	6.4
Essex	-	-	-	-
West Flanders	522599	13.4	4.7	18.1
East Flanders	34941	0.6	0.6	1.2
South Holland	-	-	-	-
Zeeland	283149	10.6	6.4	17.0

Source: Euregion Scheldemond Interreg III program 2000-2006; Suffolk Tourism Strategy

7.4 Main conclusions with respect to tourism

- The REGENSEA area can be characterised as a very ***attractive tourist destination*** because of the combination of beaches, water recreation, historical towns, large open areas and the vicinity of cities like London, Brussels, Antwerp and Amsterdam. In each of the regions within the REGENSEA area, tourism is an important economic sector. However, the REGENSEA area is not yet seen as one tourist region and there is no co-operation between tourist attractions in different countries. There is a strong competition between cities and the coastal zones within and between the provinces and between different businesses.

- The ***product cycle*** of tourist attractions is getting smaller. Therefore 'new' products with an international exposure should be developed, like industrial tourism, business tourism and out-of-season activities. In order to realise this, a cross-border/cross-sea co-operation in various segments of the tourism sector is necessary, i.e. the introduction of new REGENSEA tourist arrangements (like cycling and walking tours, horse riding, sailing, tour visits and bed and breakfast arrangements) and promoting and marketing of tourism in the REGENSEA area. International co-operation would improve through the introduction of an integrated ticketing and reservation system (for example, one ticket for ferry, bed and breakfast arrangement and cycling tour in Belgium, the Netherlands and the UK). To support these activities, the internet and e-commerce can be used.

- The ferries that connect the regions within the REGENSEA are mainly used by tourists (see also chapter 3). In order to stimulate the local economy in the ***port towns***, tourists should be encouraged to spend time locally. Therefore new attractions should be created, in relation to the initiative to start new economic activities in the port towns (see also chapter 4).

- ***Public transport*** between (international) tourist attractions is mainly focused on the metropolitan areas. The international public transport between the main tourist destinations in rural areas should be improved within the REGENSEA area.

- The ***exchange of information and experiences*** on various issues, including for example:
  - partnership structures;
  - financial issues;
  - labour market and education;
  - sustainable tourism;
  - impact of ICT developments;
  - rural tourism.

- More information should be collected about the ***tourist industry***:
  - An analysis of the economic importance of tourism in the concerned regions reflecting to diverse types of tourism (i.e. water, cultural, agro- and cycling tourism);
  - An analysis of the tourist related industry;
  - The relation between tourism and professional training;
  - Impact of short-term holidays within the tourism-figures of all regions;
  - The regional and international tendencies with reference to more qualitative or high-standard holidays;
  - An identification of all actors in the promotion of tourism in the concerned regions;
  - An identification of all actors that are active in the product development in the concerned regions;
  - An overview of the existing networks within the tourist industry in the provinces;
  - An overview of the utilised quality standards in the concerned regions;
  - An overview of the existing booking-systems in the concerned areas;

- An analysis of the diverse procedures on bookings for overnight stays and special events;
- Identification of cultural events and an analysis about the impact on tourism.

- With reference to the ***tourist attractions***, two items should be investigated:
  - An analysis of the tourist products that have been developed in the concerned provinces;
  - What is the importance of business/congress tourism and cruise tourism in the different provinces.

- In this paragraph the following information about the ***tourist profile*** is missing and should be collected:
  - An analysis of interregional mobility between the regions;
  - The duration of overnight stays.

Chapter 8 **SWOT analysis**

8.1 Conclusions from the social economic analysis

The social economic analysis shows that the REGENSEA area can not yet be seen as an integrated European region. Each of the six regions that are part of the REGENSEA area has its own characteristics with respect to the spatial structure and the spatial development perspective, transport and infrastructure, economic development, labour market, environment and tourism.

The North Sea is clearly perceived as an obstacle to East-West relations within the REGENSEA area. The North-South relations between the Belgian regions and the Dutch regions are much better developed, among other things stimulated by the INTERREG I and INTERREG II programme for the Euregion Scheldemond. Nevertheless, also in the Euregion Scheldemond, numerous obstacles still impede the optimal development of cross-border relations.

Furthermore, the impact of the surrounding metropolitan regions (the Greater London metropolitan area, the Flemish Diamond and the Randstad Holland) is very well visible. For instance, a large part of the province of South Holland is primarily part of the Randstad, with intensive relations with the northern part of the Randstad. The region of Gent is, from an economic point of view, primarily part of the Flemish Diamond, with intensive relations with Brussels and Antwerp. Suffolk and Essex have stronger relations with other UK regions than with the Belgian and Dutch regions. The regions in the REGENSEA area are also becoming part of 'new' East-West and North-South Euro corridors.

Nevertheless, the social-economic analysis of the REGENSEA area also points out that in various fields – from economic development to environmental protection – there are certainly good opportunities and/or reasons for the regions in the REGENSEA area to intensify co-operation. Transnational co-operation may contribute, for instance, to the protection of vulnerable nature reservation areas, the economic development of the participating regions (for instance with respect to tourism and the port-related industry) and the removal of institutional obstacles to international labour mobility. Moreover, in some respects those regions also face similar problems, due to the fact that they are border regions. These problems include, for instance, the 'gaps' in transnational infrastructure, the negative impact of the Channel Tunnel to the economy of these regions and their (locally) relatively isolated position to the central regions of the UK, Belgium and the Netherlands. Certainly, cross-border co-operation – for instance in terms of exchange of information and experiences – can help to find solutions for those problems.

The present chapter contains a SWOT analysis of the REGENSEA area, based on the social economic analysis and two workshops held in the United Kingdom and the Netherlands. Therefore it is possible that some items are mentioned that have not been discussed in the social analysis. Successively, the SWOT analysis the of spatial structure and the spatial development perspective, transport and infrastructure, economic development, labour market, environment and tourism is presented. These SWOT analyses have been prepared for the whole REGENSEA area. The SWOT will be the starting point for the REGENSEA development perspective in chapter 9.

8.2 Spatial structure and spatial development perspective

Strengths	Weaknesses
• The REGENSEA area has a good position in the Northwest European context. The area is situated between the Randstad, the Flemish Diamond, Greater London, the Lille area and the Ruhr area. • The relatively peripheral position of West Flanders and Zeeland is compensated by the position with reference to important ports like Zeebrugge, Ostend and Zeeland Seaports and the growth pole of Brugge and Kortrijk. • The climate of living and life is considered as attractive, especially in West Flanders and Zeeland. In East Flanders the quality of living is highest in the areas that have been bounded by these two provinces. • The cross-border North-South connections have strongly been improved, among other things by the influence of the INTERREG-program for the Euregion Scheldemond. • The designation of Priority Areas for Economic Regeneration in the Regional Planning Guidance (RPG9), providing a focus for investment in these areas, includes areas around Harwich, Clacton, Harlow, as well as the Thames Gateway. • In general, the coastal zones in the REGENSEA area have a high quality and environmental value. Either as economic centres (ports) or as tourist attractions (beaches and dunes). • The REGENSEA area possesses a strongly developed living and working environment of international significance with Rotterdam, The Hague and the surrounding areas in the southern part of the Randstad.	• Geographically, the REGENSEA area is not considered as an integrated area. The North sea forms a barrier within the area. • The current regional planning guidance in the UK splits Essex and Suffolk into different regions which does not promote co-operation between the two areas. • A general presumption against development in the planning process and lack of flexibility in development control decision making can create difficulties for development projects, especially in areas regarded as important conservation areas. • Lack of effective linkage at regional scale between planning for economic development, land use and infrastructure means that these policies do not always complement each other. • Especially in Zeeland, East and West Flanders is a large amount of rural areas. Therefor the basis for facilities is quite small. • Cities and urban areas dominate the spatial structure in every province. As a result the rural areas suffer of constant pressure of urbanisation. • The larger part of the province of South Holland has a high population pressure. • Especially the Belgium and English regions have become more peripheral areas since the implementation of the Channel Tunnel. • The most important urban areas in the REGENSEA area are hardly focused or not focused at all at the REGENSEA area.

Opportunities	Threats
• As a new European area the REGENSEA area can use its opportunities to change its peripheral image for a new central image in between different metropolitan areas. • Spin-off effects of the surrounding urban areas like the Randstad, the Flemish Diamond and London. • The recent Europeanisation in spatial planning offers perspectives for the development of new European areas. • A decreasing meaning of the border. • A stronger cross-border co-operation can decrease the functional independence and strengthen the functions of urban areas in the REGENSEA area. • The development of network structures at different spatial levels can strengthen the position of the REGENSEA area. • Cross-border co-ordination of town and country planning and the operation of building developments can contribute to prevent more splitting and destroying of the natural environment. • The Suffolk Development Agency (SDA) and the Essex Economic Partnerships (EEP) are committed on sub-regional level to implementing the vision and strategy for developing the counties and to working with other organisations. • Formation of a new regional planning body for East of England which will be operational from April 2001 with pan regional arrangements for 'Greater South East' will provide an opportunity to co-ordinate planning better across former boundaries. • Capacity for further 8,000 homes (including further 4,000 at Chafford Hundred).	• The opportunities of developments in the REGENSEA area have been mainly concentrated on the urban areas. The sparsely populated rural areas are threatened to lack behind. • The qualities of the REGENSEA area can not be communicated (enough) across the regional borders. • The barrier of the country border is still clearly noticeable, for example by the lack of cross-border co-ordination of town and country planning and the operation of building developments. • The fields of power of the adjoining strongly urbanised landscapes and metropoles have a strong influence on the spatial development, like the need for building areas. • Within Europe many new European areas and corridors arise that threatens the opportunity to create the REGENSEA area as a European area. • The development of the REGENSEA area is constrained by water resources. • Suffolk and Essex will have pressure caused by for additional housing developments in areas susceptible to high levels of long-distance commuting • There is only limited investment in transport, which is a threat to sustainable development that in turn may have an impact on road improvement schemes.

8.3 Transport en infrastructure

Strengths	Weaknesses
• A direct connection to the international HST network in Rotterdam and The Hague. • Stansted is the fastest growing airport in the UK and major expansion of terminal capacity is currently underway. • In the REGENSEA area important ports that are part of the international port network are situated, like Zeebrugge, Ostend, Gent, Waasland, Vlissingen, Terneuzen, Rotterdam, Vlaardingen, Schiedam, Tilbury, Felixstowe and Harwich. • The situation of Rotterdam airport that is used for the transportation of both persons and freight. The last couple of years this airport has strongly developed concerning airplane movements, passengers and freight. • The highway links between the REGENSEA area and the international network. In Flanders the E17 was build to connect Paris to Eindhoven (by Kortrijk, Gent and Antwerp) and the E40 London to the Ruhr area (by way of Calais, Gent, Brussels, Liege en Achen). Two important connections in Zeeland are the Dammenroute (N57) and the Zeelandroute (N59). South Holland has a good highway structure as well, like the connection from The Hague tot North Holland (A4 en A44), from The Hague towards the east of Holland (A12) and from Rotterdam to the south of Holland (A16) en the east of Holland (A15). Suffolk and Essex have good road and rail links to London and the multi modal studies for M11 and A12 should lead to more integrated transport solutions and a clearer link with land-use planning. • The public transport facilities in the urban area are good. Existing train and buss services provide a basis to extend the provision to the more remote rural areas. • Various ferries connect the Flemish and Dutch provinces with the English counties.	• The most important connection between the UK and the continent is situated outside the REGENSEA area (Channel Tunnel), for both the transportation of persons and freight. • Large parts of the REGENSEA area do not have a good connection with the international HST network. • There are no airports for the transportation of persons in East Flanders and Zeeland. In West Flanders (Ostend) charters are offered on a non regularly basis. • The limits of the capacity of the through infrastructure have been mainly reached, especially in East Flanders and South Holland. • Much congestion in the urban areas of the region. • Very poor road links and public transport provision in the remote areas and peripheral areas. • Little transport alternatives (public transport) for cars, especially in the rural areas. There is only one cross-border bus connection between Zeeland and West Flanders, which is from Breskens to Brugge. • The lack of a concept for cross-border public transport and links to main towns. • In Flanders and the Netherlands the highways are mainly orientated in the direction between east and west. There are little connections between north and south. However, the east-west links in the English regions are poor instead of the north-south links, which has led to continued remoteness and inaccessibility of rural communities e.g. relative isolation of north-east Suffolk. • The spatial relations between South Holland and Zeeland are relatively bad. The relation between South Holland and the rest of the Randstad is much stronger. • Infrastructure bottlenecks hinder an optimum use of transport and distribution potential for example tunnel restrictions on the line to Ipswich which constrain use of rail network. • A different policy in accordance to the transportation of cargo, like gas prices and road tax in the REGENSEA area. • Insufficient connections between public transport and the North Sea ferries. • Relatively high costs for the use of ferries and the lack of business orientation of the timetables prevent a good connection between the counties in the UK and the Flemish and Dutch provinces in the REGENSEA-area.

Opportunities	Threats
• The seaports in the REGENSEA area offer many opportunities to profile the region more than they do now and several have existing good links to the Seaports in the area e.g. Tilbury and Felixstowe ports and the motorway network. • There are existing plans to boost the regional infrastructure e.g. Feasibility study for lower Thames crossing. • Co-operation between seaports and airports gives opportunities for the development of a unique multi modal region (water, rail, road, air). • Co-operation between seaports can be developed stronger. • Development opportunities at Stansted and Southend Airport. • The implementation of RandstadRail, free bus lanes and parking places at railway stations should lead to the reduction of car use and therefor less congestion in South Holland. • Improved rail links in the UK, in particular east-west rail links in Suffolk and Essex – if implemented – will improve cross-country communications and enable greater use of rail for freight and passenger traffic. • The Westerschelde Tunnel can provide a good connection to existing road transport and therefore offer more opportunities in the four Flemish and Dutch provinces. According to the fact that north-south connections are getting more important for the economy in the EU and the fact that the Westerschelde Tunnel is connection from north to south, this creates potentials in additions to the present infrastructure. • In the ports of Gent, Ostend, Zeebrugge and Zeeland the VAL concept can mean an extra attraction to new activities. • Port leisure development e.g. in Lowestoft can help encourage tourism. • Cross-border public transport supports cross-border integration (including the connection to the North Sea ferries). • Surplus value by co-operation between logistic nodal points in the REGENSEA area.	• The increase of car ownership and car use leads to an increasing congestion in the REGENSEA area, mainly in East Flanders and South Holland. However, attending the central situation of these provinces on the important north-south connection between the Netherlands and Flanders and the future traffic development as a consequence of the Westerschelde Tunnel, also Zeeland and West Flanders could deal with (the consequences of) congestion problems soon. • Fragmented responsibility and limited funding for public transport in Essex and Suffolk (as in the UK generally) make it very difficult to develop of an integrated public transport network which offers a real alternative to the use of the car (e.g. compare investment in high speed rail in Belgium and Netherlands with UK rail system). • Concerning the opening up the problems of the ports are increasing: – the ports of Gent and Zeeland are mainly importing ports. Therefor many ships return without cargo or have to trade to Antwerp to collect cargo before returning. In the end this can work out negative for competing activities; – the accessibility of the port of Gent has to be improved concerning the competing situation in the future; – the ports of Zeebrugge and Ostend are not opened up enough by inland navigation ways. • Strong competition between the Channel Tunnel and North Sea ferries could threaten the existence of scheduled services in the future. • Links to the ports of Harwich, Felixstowe and Ipswich need to be improved to realise their benefit to the economy. • A limited investment in (public) transport is a threat to sustainable and economic developments.

8.4 Economic structure

Strengths	Weaknesses
• The REGENSEA regions have an attractive business climate with a stable economic base and some strong sectoral clusters, e.g. tourism and high tech. • Economic relations have been strengthened between the provinces that are part of the Euregion Scheldemond area. • Important positions of the seaports. The port related economic activities have a large impact on the function of the regional economy. • Gent is the second largest industrial area in Flanders and Brugge is also an important economic centre in Belgium. • Especially South Holland is an attractive region for the establishment of foreign companies. The last couple of years the number of new companies decreased, while the number of workplaces increased. It seems that South Holland is able to attract large companies. • In South Holland a couple of technological centres have been established: the brainpark in Rotterdam, the Bio Science Park in Leiden and the Delftechpark in Delft. In Gent there is also a centre of bio-technology. • The Hague and Rotterdam fulfil an important position as office towns. • The central position of the provinces leads to the nearness of important economic centres like the Randstad, the Flemish Diamond, Cambridge and London. • Economic development strategies and partnerships already in place by local government organisations e.g. Essex Economic Partnership • The role of the SME, which account for over 90% of the region's businesses is very important. For example in the Netherlands SMEs have provided a strong growth of the employment the last couple of years. In each area there are also many institutions that support professional activities and networks for the SME. • Within the REGENSEA areas there are pockets of a strong manufacturing base e.g. Haverhill in Suffolk, and south Essex.	• The economic structure in the REGENSEA area has not been integrated; the economic relations between the English regions and the Dutch and Flemish regions are hardly developed. The areas around The Hague and Rotterdam have mainly been orientated at the other part of the Randstad. • The production structure in East Flanders and Zeeland is partially dependent of a number of large companies in sectors that strongly depend on international developments (compared to Suffolk and Essex which have very high numbers of small companies and low manufacturing productivity). • South Holland, West and East Flanders have a shortage of business sites. Especially in South Holland there are relatively few hectares of business sites left. Flanders has plenty hectares of business sites but these hectares cannot be emitted at short term. • The coastal provinces have to deal with the structural crisis in the fishing industry. Important common aspects are the fishing quota of the EU and the competition of non-EU countries, like for example from Eastern Europe. Besides, West Flanders has to deal with the Dutch infiltration, an obsolete navy and a shortage of trained crew-members. • In South Holland the market sector of the glass house industry decreases by the reconstruction of the Westland, the shortage of space, the congestion and the high land prices. • In South Holland the knowledge economy lags behind compared to the Dutch average growth. The research institutes have an important contribution to the innovation and knowledge orientation, while the businesses slightly lag behind. • The economies of Essex and Suffolk have a relatively low proportion of growth in manufacturing and research and development and a preponderance of low value-added industries such as the dependence on agricultural sector and related industries, e.g. food manufacturing, in rural areas yielding low incomes. • There are areas requiring economic regeneration in coastal Essex and Suffolk. • The REGENSEA area is strongly confronted with the negative economic aspects of the reconstruction processes in the agricultural, because this region consists mainly of rural area.

Opportunities	Threats
• The presence of important seaports offers economic opportunities for the development of a unique multi modal region in the REGENSEA area. • Joined marketing and acquisition actions together with the introduction of the new image as the REGENSEA area offers opportunities in the Europe of regions. • Until now the service sector in all provinces has developed less rapid than the regional or national average Therefor the service sector has a couple of opportunities for growing like in the social profit institutes, but also in tourist and recreation activities (mainly in East Flanders). • A high export rate in the manufacturing sector as well as the specific knowledge in the export sector can be seen as a location advantage for competition within Europe. • In the Flemish provinces the expansion of high-tech sectors has special potential growth (the biotechnological park in East Flanders and the Flanders' Language Valley in West Flanders) • The Cambridge to Ipswich corridor is an important and growing high tech cluster in the UK. This cluster could, if successful, generate substantial benefits to both main centres and also intermediate towns such as Bury St Edmunds and Stowmarket. • New infrastructure to promote added value industries is currently being developed such as the proposed innovation park/ technology transfer opportunities at BT Research and the university and televersity in development in Suffolk. • Regeneration proposals for the Thames gateway could stimulate substantial new economic activity in south Essex. Priority areas for regeneration include Lowesoft, Ipswich, Clacton and Southend • Promotion of growth corridors: – A12/Great Easters – A13/A127/London-Tilbury-Southend • The attention for quality and marketing is getting stronger. • The strengthening of relations between businesses in the UK regions and businesses in the Dutch and Belgium regions. • Significant development sites (in Suffolk – Bentwaters & Woodbridge; in Essex Tilbury Port and land made available at West Thurrock Power Station) • Back offices moving from London to Essex/Suffolk (call centre businesses) provide job opportunities	• Potential impact of loss of large firms, particularly in remoter areas, dependency on larger companies • Both West and East Flanders have to deal with the delocation processes in the direction of border regions with EU subsidies (Henegouwen and North of France). • The business dynamic of West and East Flanders is limited by various aspects related to spatial planning, like the lack of business sites and the problems of businesses that have not been established at the right business sites. • The regional economy of Zeeland is more or less dominated by the presence of some large companies. Therefore Zeeland depends too much on these companies, mainly according to the employment. • At this moment the vegetable and flower auction in South Holland dominates the Dutch market, but this part is decreasing. • The competition of developing agricultural areas within and outside Europe is increasing, like countries in Eastern Europe or North Africa. • In South Holland the negative effects of economic reconstruction processes threaten the horticultural sector, a lack of expanding opportunities, high land prices and the competition with other horticultural areas. • The REGENSEA area is not a part of new European corridors with the exception of Rotterdam and The Hague. • The regional economy of the REGENSEA area strongly depends on the port related economic activities. Growth and further development of other seaports possibly forms a threat for the regional economy in this area. • Strength of competing from stronger economic regions such as Eastern region (including Cambridge, Stansted)

8.5 Labour market

Strengths	Weaknesses
• The working climate is stable and the employees are motivated. There is also a high quality of labour force, partly by the presence of the universities in Delft, Leiden, Rotterdam, Gent, Kortrijk, the European College in Brugge, Colchester and Chelmsford/Cambridge. • The unemployment in all provinces decreased in recent years, especially in the urban regions. In the region of Rotterdam and The Hague the labour market is tight. • The language skills in the REGENSEA area are good, especially for the higher educated inhabitants in the Netherlands and Flanders. • Proximity of major employment centres e.g. London provide job opportunities and readily available potential labour force. • Maritime employment has grown around the ports (e.g. Ipswich).	• There is no (sufficient) university infrastructure in West Flanders, Suffolk and Zeeland. • Because of the lack of a university, Zeeland has to deal with a lack of highly skilled jobs at the labour market. Many highly skilled young persons leave Zeeland. The low level of education degrees of a large part of the potential labour force is one of the most important factors in the employment policy. This is also the problem in East Flanders. The adjustment of education and labour market has been marked as a bottleneck in most Flanders provinces for years. • The part of employment for higher educated people out of the total employment has been concentrated in the urban areas in all provinces and high proportion of the skilled workforce commute from the areas e.g. from Suffolk and Essex to London. • Progress towards the National Targets for workforce qualifications in both Essex and Suffolk is limited and lower than the national average • Employers continue to report skills shortages in the workforce in particular personal, basic and managment skills • According to the opportunities of cross-border employment there are some administrative, law and fiscal obstacles that make it impossible for the regional labour market to function perfectly. • In the REGENSEA area there is no cross-border labour market. So far the Euregion Scheldemond has not developed an euregional labour market. • A shortage of cross-border public transport and the perceived barrier of the North Sea hinder the development of cross-border exchanges on the labour market for example. • Low average earnings • Pockets of high unemployment and deprivation (notably in Harlow, Ipswich, Waveney, Basildon, Clacton, Southend) • Unemployment also linked to declining sectors such as agriculture and fishing

Opportunities	Threats
• In the short/medium term - Support received through national and EU funding mechanisms (Obj.2, INTERREG, ESF, SRB) • A cross-border labour market offers more opportunities for finding a job. • The European Union wants to stimulate the development of the international labour market. • The regional shortage of employment can be partly solved by stimulating a cross-border labour market. • The mutual recognition of diplomas offers opportunities for a cross-border labour market and can contribute to an innovative, future-minded image of polytechnics and university. • The knowledge of different languages of the labour force in Flanders and the Netherlands forms a stimulus for the establishment of businesses. • A specialisation of polytechnics and universities in the field of cross-border phrasings or solving of problems that become more important both within Europe as world-wide. • The development of cross-border co-operation in research and knowledge transfer can increase the competition capacity. • The expansion of co-operation among businesses and between businesses and knowledge centres at different knowledge areas can support the economic development process.	• Speed of technological change will place increased pressure of the workforce, in particular those with long term unemployment difficulties • The decreasing employment in the manufacturing and the agricultural sector and specifically the knock-on effects of Dagenham redundancies. Partly caused by the technologic changes and negative effects of reconstruction in the agricultural sector. • The raising of EU funds and the changes in structural funds. • Ageing of the population that might lead to a tight labour market. • Insufficient harmonisation of the Flemish, Dutch and English educational institutions. • Insufficient feed back between the requirements of employers that is asked for by businesses and the educational institutes. • The continuing boundary at the labour market prevents the Euregion integration of different important sectors. • Shortage of labour and skills in key sectors for example, lower skills levels in Essex may perpetuate economic and social problems.

8.6 Environment

Strengths	Weaknesses
• The REGENSEA area is characterised by high quality, diverse environment including valuable coastal zones and attractive valuable ecological areas. • The presence, high quality and diversity of ecological and natural areas like the Creek are and the Green Hart. • Air quality is generally good quality / pure • Existing conservation designations for ecological and natural areas of high quality • Dutch ports have good waste collecting services for ships, the so called Haven Ontvangst Installaties (HOI). • The Rijn Schelde Delta is well cleaned by dredging on a regularly basis. • There are no direct drainings from sewer systems anymore. Therefore the quality of sea water and attractiveness of the beaches have been improved. • In the Netherlands meetings are held on a regularly basis between the government and industries. These meetings are basically to inform different parties. • Certain industries have been concentrated in certain regions like the Westland (glass house industry).	• A relatively bad quality of air in urban, industrial areas. • The threatening of the environment that is caused by the sector of agriculture. • Mineral extraction: wide range of minerals brick clay, sand & limestone – needs to be managed • Especially in the UK counties there is a dry climate: Suffolk and Essex are the driest regions in England. • In general the quality of the water in the North Sea is not too good. • Lots of areas suffer of noice pollution by different causes, like manufacturing, airplanes and other vehicles.

Opportunities	Threats
• A cross-border approach of the development of nature and the protection of the environment will lead to better results. • By the development of a new co-operation structure, the REGENSEA project offers unique opportunities for collective management of valuable coastal zones and the North Sea. • The development of international water management for the REGENSEA area. • By a stronger synergy between the economy and the environment the awareness of the environment increases. This can lead to the development of new activities and the extension of existing activities. Indeed the sustainable development concepts have to be considered. • The implementation of environmental healthy production methods. • *Increase in participatory conservation holidays* • In all regions initiatives have been started to develop new nature. • Stimulating environmentally friendly entrepreneurship. • Another way of financing the collection of waste in ports (HOI) will decrease the fleeing of ships to other ports.	• Development of tourism and economic activities in the coastal areas can lead to the threatening of the nature areas. • There are too many tourists compared to what nature areas can cope with. The number of tourists is still increasing, mainly in a couple of attractive areas, like the coastal and urban areas. This leads to more environment pollution. • Intensive farming activities' negative impact on the countryside, in particular run-off and threat to woodlands • Pressure for development, in particular housing, may detract from quality of environment • Pollution from transport (especially cars), and port industries • Coastal erosion • Aggregate extraction (off shore mining and *dredging in the Thames estuary)* • Intensive use of the land, for example in the agricultural sector, has a negative influence on the quality of the environment. • The masse overpopulation in the metropolitan areas causes a large demand of space and will increase the pressure of building at the free spatial area, especially in South Holland and nearby the urban areas in other provinces. • The opportunity for an airport in the North Sea.

8.7 Tourism

Strengths	Weaknesses
• Existence of common tourist attractions throughout the REGENSEA area including coasts, fenland/marshland, historic cities, and cycling. • The market for leisure activities is growing and spare time and spending increase in all provinces. The present museums, attractions, events and coastal area attract many visitors every year. Especially the coastal zones and cities are interesting attractions for tourists. • A strongly developed tourist sector and increase of business tourist sector. In the Netherlands of half of the number of international congresses is held in this South Holland . • Many museums and other tourist attractions like the Kunsthal, the Ahoy, a couple of festival in South Holland and the music festival near Aldburgh • The presence of the beaches and dunes • There are many attractive and quiet rural areas and villages, especially in Zeeland, West and East Flanders, Suffolk and Essex. • Tourists have a lot of choice in accommodation at reasonable cost. • Especially South Holland and Essex have an international accessibility by the presence of the airport. Also cities as Gent and Brugge have a good accessibility by good rail connections to the international network. • International attractive cities in the REGENSEA area and accessibility of major population centres (within 2-3 hours travel). • The rich cultural heritage in Suffolk and parts of Essex, notably the churches and country houses, built in the Middle Ages. • There are plenty of walking and cycling routes in all provinces. • The presence of (fast) ferries and the Channel Tunnel where tourists enter the country. • Low crime rate. • International accessibility through the absence of a language barrier between the regions • Strong US Market for Suffolk and Essex: special historical links associated with founding US and World War II air bases • Horseracing in Newmarket • Existence of the East of England Cultural Consortium • Over 24 million people per annum attracted to regional shopping facilities • The situation along the new waterway in Zeeland. • A great variety within a relatively small area.	• A high pressure on tourist areas like the coastal zone and the cities by a large number of tourists. • Coast related tourism has mainly been situated in valuable nature areas in West Flanders, Zeeland and South Holland. The opportunities for expending are limited. • The UK had a negative international image as being cold, having a lot of rain, being flat and uninteresting. • There are no large, common tourist attractions between the provinces in the REGENSEA area. • Shortage of 4/5 star hotel accommodation • Limited accommodation stock for groups, and away from the coast, for individuals • Public transport away from larger towns is poor • The tourist industry has a limited professionalism. Better and more training for those employed in tourism business is needed. • The REGENSEA area is not seen as one integrated tourist area. • No clear identity and lacks big name destinations or major sports attraction/ amenities • Poor understanding by regional organisations of tourism markets • The limited way of co-operation. • Lack of opportunities to expand caused by the scarcity of land.

Opportunities	Threats
• Cultural and sport events strengthen the cross-border integration and have a positive effect on the reputation of the region to the outside world like the European Football Championships. • Better use of historical features such as stately homes and military forts • The presence of international known and attractive cities in the vicinity, like London, Amsterdam, Brussels, Antwerp and Utrecht. • Especially the increase of the number of short holidays and business tourism stimulate the demand of (cross-border) tourist activities and therefore the creation of jobs. • Scope for growth of short break tourism from rest of UK and near continent • Reduction of costs by co-operations. • International marketing activities for tourist areas by way of established partnerships e.g., with ETB for overseas marketing • Increasing use of IT to research and book holidays • The development of common cross-border and cross-sea tourist arrangements. • Good opportunities for the combination of city trips and coast tourism. • Substantial areas of land in Essex with Thames frontage, accommodating wide range of port and industrial activities some of which is unattractive and does not need the waterside location • Capture more spending from people travelling into/through ports/airports – try and keep visitors from overseas in the region for one day • Some economic activities can be transformed into tourist attractions (like the flower auction).	• The provinces are primarily competing to each other which makes it difficult to co-operate at international marketing for example. • An increasing national and international competition between cities and coastal areas. • The contrast between the attraction of tourists on the one hand and the consequences for nature and environment on the other hand. • Lack of cross-border co-ordination between the various organisations in the industry and between different provinces. • Negative images concerning weather and cost and of part of the areas concerning environment. • Conservation constraints: many popular tourist areas are environmentally sensitive • Negative perception of tourism by some residents. • A short product life cycle of tourist products. • Insufficient relations between large companies and SMEs. • The scaling up of the tourist industry can lead to an unwished uniformity. • Permanent living in tourist parks.

Chapter 9 REGENSEA development perspective

9.1 Introduction

The results of the socio-economic analysis (chapter two to seven) and the SWOT-analysis (chapter eight) show on the one hand that the REGENSEA area can not be considered as an integrated international region, mainly due to the North Sea as a natural barrier (though certainly many cross-border/cross-sea relations exist within the REGENSEA area). On the other hand there seem to be many opportunities and chances to make use of the synergy effects that can be the result of co-operation within the REGENSEA area.

The focus of the present analysis has been on the relation between the regions within the REGENSEA. We have not paid attention to the relation of these regions with the surrounding metropolitan regions and other ports of Europe. However – and we should keep in mind that this was one of the basic observations underlying the REGENSEA project – these relations are very strong and have at present probably a larger impact on the spatial-economic and socio-economic development of the regions within the REGENSEA area than the relations that have been investigated.

These observations can be considered as the starting points for the REGENSEA development perspective. In the present chapter the development perspective for the REGENSEA area is presented, paying attention to the spatial structure and planning system, transport and infrastructure, economic structure, the labour market, the environment and tourism.

In Section 9.2 the above mentioned points, in combination with some other issues, are discussed as the starting points for the development perspective. Section 9.3 contains the REGENSEA development perspective. Finally in section 9.4 this development perspective is operationalised by defining the directions for bringing this perspective into practise.

9.2 Starting points

The REGENSEA development perspective is based on the following starting points:

Character of the REGENSEA area

From a spatial perspective, the REGENSEA area cannot be considered as an integrated international region. Due to the North Sea as a natural barrier, the spatial-economic and socio-economic relations are at present rather weak. Since the North Sea will stay a natural barrier, the further development of the REGENSEA area towards a fully integrated international region seems to be no option instead, the objective of REGENSEA is to focus on and emphasise the issues and themes within the REGENSEA area that can benefit from a joined approach of the REGENSEA area.

Synergy effects as a result of co-operation within the REGENSEA area

The synergy effects as a result of co-operation within the REGENSEA area are the corner stone of the development perspective of REGENSEA. The socio-economic analysis of the REGENSEA area shows that there are many opportunities and chances to make use of the synergy effects that can be the result of co-operation between the REGENSEA partner regions. Five main reasons can be identified for co-operation:

- reduction of the negative effects of both natural and institutional obstacles, related to the existence of international borders in the REGENSEA area;
- exchange of information and experiences: because the regions participating in REGENSEA face similar problems in various policy fields, the partner regions can learn from each other with respect to the way they deal with these problems;
- advantages of scale: with respect to certain issues, it may be more efficient for the partner regions to co-operate;
- integrated policy: because various themes obviously have an international scope (i.e. environmental issues), an integrated policy for the REGENSEA area may be needed to be able to deal with these issues effectively;
- governmental structures: again, to be able to deal effectively with the common REGENSEA issues it can be worthwhile to implement new governmental co-operative structures, in order to steer the execution of REGENSEA projects.

Crucial for the REGENSEA development perspective is the assumption that REGENSEA must select those issues that can be expected to benefit from a joined international approach.

Taking the reasons for co-operation as a starting point in section 9.4 a large number of issues will be defined that ask for a joined approach of the REGENSEA partner regions.

Relation of REGENSEA to the surrounding metropolitan area

The REGENSEA area should not be seen as an individual region. REGENSEA is situated between five metropolitan areas: Randstad Holland, Greater London, the Flemish Diamond, the Ruhr area and the Lille area. These areas have many inhabitants that form a broad basis for social and economic activities, like for example tourism. The relations with these metropolitan areas are important and can be seen as essential preconditions. However, the REGENSEA project does not focus on the strengthening of these external relations. The REGENSEA project focuses on the strengthening of the internal relationships.

Optimal level for international co-operation

There are many different levels for co-operation on an international level. It is possible that the level of the REGENSEA area is not always the optimal level for international co-operation. If and where possible the optimum level of co-operation should be pursued. Otherwise the pragmatically way has to be chosen. Co-operation on the REGENSEA level can sometimes be effective and therefore should be used. However, it is very important to tune the co-operation with other EU regions.

Relation to other EU-programs and projects

The REGENSEA area is part of the North West Metropolitan Area (NWMA), one of the central regions in Europe. To develop a mutual approach to the opportunities and threats of new spatial developments, the Interreg II C program has been launched. Within the NWMA a number of European funded Interreg projects are carried out that have a direct or indirect effect on the REGENSEA area. The REGENSEA project can contribute to the fine-tuning of this program and the projects.

9.3 REGENSEA development perspective

The REGENSEA development perspective can now be defined as follows:

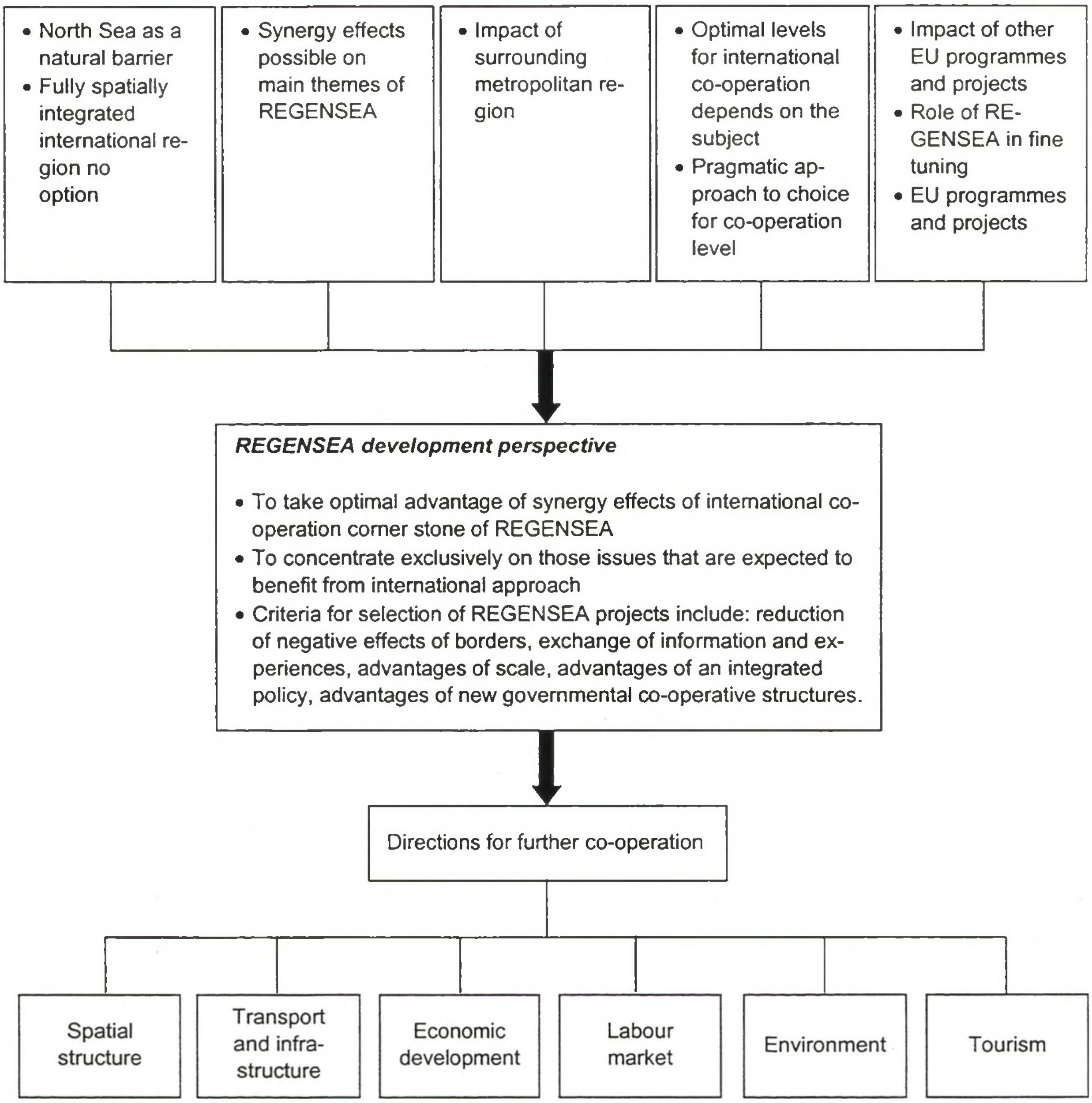
- ***To make use of the synergy effects*** that can be the result of co-operation between the REGENSEA partner regions in the field of spatial structure and spatial development, transport and infrastructure, economic structure, the labour market, the environment and tourism. ***The aim to take optimal advantage of those synergy effects must be considered as the corner stone of REGENSEA***. The co-operation within REGENSEA will thus concentrate exclusively on those issues that are expected to benefit from an international approach within the REGENSEA programme.

- The development perspective is based on the ***following assumptions***:
  - with the North Sea as a natural barrier, the REGENSEA area is not expected to develop towards an spatially integrated international region;
  - the REGENSEA area is completely surrounded by large metropolitan regions. The impact of the relations of each of the partner regions with the surrounding metropolitan regions play a vital role with respect to future developments in REGENSEA;
  - many of the issues that have been identified in the socio-economic analysis ask for an international approach. Though the level of REGENSEA is perhaps not always the optimal international level for this approach, from a practical point of view the REGENSEA level may still be preferred (since international co-operative structures are already stable);
  - various other EU programmes and projects are carried out in the REGENSEA area. One of the objectives of REGENSEA is to attune these programmes and projects.

- The ***selection of REGENSEA projects*** takes place based on ***five different criteria***:
  - reduction of the negative effects of both natural and institutional obstacles, related to the international borders;
  - exchange of information and experiences;
  - advantages of scale;
  - advantages of an integrated policy;
  - advantages of new governmental co-operative structures.

Figure 9.1 represents the REGENSEA development perspective in diagram form.

Figure 9.1 REGENSEA development perspective



9.4 Directions for further co-operation

The central themes in REGENSEA are: spatial structure and development perspective, transport and infrastructure, economic structure, labour market, the environment and tourism. For each of these themes directions for further co-operation have been identified. These directions for further co-operation can be taken as a starting point to develop new projects in the Interreg III Programme.

Spatial structure and development perspective

- To promote and make use of the good international situation of the REGENSEA area in between five metropolitan areas;
- To promote the characteristics of the REGENSEA area like the combination of large open rural areas and coastal zones, medium-sized urban regions and metropolitan areas and to develop or regenerate some areas;
- To maintain and if possible extend the existing cross-sea relations between the UK and Flanders and the Netherlands;
- To stimulate the co-operation within the REGENSEA area in spite of the North Sea as a natural barrier;
- To start or extend the co-operation with respect to the spatial development perspective of the REGENSEA area, for instance in terms of tuning regional spatial development plans.

Transport and infrastructure

- To promote and stimulate sustainable transport modes in the REGENSEA area, both in passenger transport and cargo transport;
- To further integrate public transport services and to optimise public transport connections, including the optimisation of ferry transport between the UK and Flanders and the Netherlands. In addition, it should be investigated if it is possible to integrate the public transport ticketing systems;
- To tune planning procedures with respect to the construction of new cross-border/cross-sea infrastructure;
- To stimulate exchange of information and experiences between the REGENSEA partner regions, for instance with respect to promoting public transport, light rail systems, modal shifts towards sustainable transport modes, the improvement of hinterland connections for the seaports, etceteras;
- To improve the infrastructure between and around the seaports and the inland connections of the seaports, in close relation with the region's further development as an international multi modal transport region;

- To stimulate short sea shipping, as a major business opportunity for the medium-sized seaports in REGENSEA. In this respect, the conditions for short sea shipping in the seaports can may be improved by introducing a network of short sea shipping ports in REGENSEA;
- To investigate the necessity of and, eventually, to prepare a REGENSEA development perspective with respect to the seaports and their infrastructure connections;
- To investigate the opportunities for the improvement of sea-air connections (especially for cargo), taking advantage of the airports and seaports that are located in the REGENSEA area;
- To investigate and improve the connections of the REGENSEA area with the international High Speed Train Network;
- To develop an integrated vision on cross-border/cross-sea pipeline systems and underground logistic systems and, subsequently, to construct and/or connect pipelines and underground logistic systems.

Economic structure

- Promoting and marketing of the REGENSEA area as an international infrastructure and logistic centre, with excellent sea, air, road and rail connection to the metropolitan areas in the NWMA;
- To improve and protect the function and meaning of seaports for the regional economy. Attention should be given to the seaport connection with the hinterland, opportunities of short-sea shipping, the restructuring of the traditional port-related industry, the negative impact of the Channel Tunnel on the international position of the REGENSEA ports, closer co-operation between the REGENSEA ports and the development of common educational initiatives and the exchange of information and experiences in the maritime sector;
- To develop new offshore activities like windmill parks;
- To develop the glass house industry, including new space for the expansion of this industry, the position of auctions and the exchange of information and experiences;
- To reconstruct the agricultural sector by creating new activities in rural areas, relocation of farms and opportunities for co-operation;
- Promoting cross-sea co-operation structures between companies to stimulate the exchange of knowledge and innovations and trade;
- To create opportunities for co-operation with respect to high-tech development.
- To investigate the need for a common strategy to stimulate the further development of the SME-sector;
- To promote international trade, joint business ventures and co-operation between business support organisations;
- To develop a common redevelopment strategy for the structural crisis in the agriculture and fishing industries. Special attention is needed for the labour market consequences of the economic crisis in the agriculture and fishing sector;
- To develop new (cross-border) locations for business activities in relation to the present shortages of business sites in the REGENSEA area.

Labour market

- To investigate in what way it is possible for universities and politechnics to co-operate within the REGENSEA area;
- To introduce international business training and education programmes in close co-operation with the market sector and the universities to initiate new international net-works in different sectors of the economy;
- To decrease or solve the problems of the shortage of employees in certain sectors, like for example technically educated persons, by a REGENSEA approach;
- To exchange experiences with relation to projects that have been focused on stimulating jobless people to enter the labour market again;
- To create a common strategy to create jobs for the unemployed low-skilled labour force;
- To create a common strategy to prevent that highly-educated people commute to the surrounding metropolitan areas and to stimulate that they find work within the REGEN-SEA area;
- To decrease juridical barriers to stimulate cross-border and cross-sea labour mobility and develop harmonisation of qualifications.

Environment

- To stimulate cross-border and cross-sea co-operation to water management;
- To create a structural co-operation policy with respect to integrated coastal manage-ment. A lot of initiatives have already been taken and must form the basis for co-operation within the REGENSEA area;
- To reduce environmental problems like the:
  - pressure on fragile ecosystems from development, coastal erosion and impact of tourism and recreation on the coastal zones (i.e. waste);
  - pollutions as an result of the industrial areas like seaports, oil spills, coastal and mari-time litter and sewage;
  - exploitation of natural resources, notably fish and shellfish;
  - noice pollution by different causes like planes and other vehicles and industrial sites;
  - relatively bad quality of the water in the North Sea;
  - overpopulation in the metropolitan areas that increases the pressure of building in the rural areas nearby the urban areas;
  - rising sea levels, tidal surges and the changing frequency and severity of storms as a result of the greenhouse effect.
- To exchange information and experiences with attention to new cross-border nature development, sustainable agriculture, sustainable development of new business loca-tions and redevelopment of existing locations, windmill parks, protection and manage-ment of valuable rural areas that are threatened by urban expansions and environmen-tally friendly entrepreneurship.

Tourism

- To co-operate within the tourism sector and introduce new cross-border and cross-sea arrangements and promoting and marketing of tourism in the REGENSEA area;
- To create opportunities to use the Internet and e-commerce for the tourism sector;
- To create new tourist attractions in the port towns to 'keep' tourists a longer time;
- To develop 'new' products with an international exposure like industrial and business tourism;
- To introduce a public transport integrated ticket and reservation system within the REGENSEA area;
- To improve international public transport connections between the main tourist destinations within the REGENSEA area;
- To exchange information and experiences on various issues like: partnership structures, financial issues, labour market and education, sustainable tourism, impact of ICT developments and rural tourism.

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Literature

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