Barrow-in-Furness Town Deal Board

Friday 17 April 2020, 9.30am – 11:30am

Item	Agenda Item	Time	P/R/V*
1	Introductions and Opening comments from Chair	9:30	V
2	Apologies for absence	9:35	V
3	Declarations of interest	9:40	V
4	Matters arising not covered elsewhere in the agenda	9:45	V
5	Minutes of Last Meeting	9:50	R
6	Communication Update	10:00	R
7	Draft Socio-Economic Narrative	10:10	R/P
8	Draft Appraisal Framework and Strategic Narrative	10:40	R/P
9	Project Long List	11:00	R
10	Programme Update	11:20	R
11	AOB	11:25	V

Future Meetings

Friday 15th May 10am
Friday 26th June 10am
Friday 31 July 10am

* Presentation / Report / Verbal

BARROW-IN-FURNESS TOWN DEAL BOARD

Meeting: Friday, 17th April, 2020
at 9.30 a.m. (Virtual Meeting)

PRESENT:

Chairman: Steve Cole (BAE Systems), Cllr Ann Thomson (Barrow BC), Sam Plum (Barrow BC), Steph Cordon (Barrow BC), Michael Barry (Cumbria CC), Cllr Anne Burns (Cumbria CC), Suzanne Caldwell (Cumbria Chamber of Commerce) Simon Fell (MP), Sami Falou (BEIS), Janet Garner (BAE Systems), Ali Greenhalgh (Cumbria CVS), Alison Hatcher (Cumbria CC), Elaine Herbert (DWP), Paul Hodgson (Barrow BID), Jo Lappin (Cumbria LEP) Julie Mennell (University of Cumbria), Rebecca Robson (Barra Culture), Andrew Wren (Furness College).

ITEM	ACTION
22 – Introductions and Opening Comments from the Chair The Chairman welcomed everyone to the meeting. **23 – Apologies** Apologies for absence had been received from Chris Clouter (ABP) and Elaine Herbert (DWP). **24 – Declarations of Interest** Julie Mennell and Andrew Wren declared that it was not appropriate to comment on Agenda Items 7 and 8. **25 – Matters Arising** The Chairman commented that there was a significant amount of challenge with Covid19 with people staying safe and trying to minimise the impact of livelihoods for people living in the community. He stated that we lived at present in quite unusual circumstances and that the Town Deal needed to maintain the momentum of the project. He reiterated that the Towns Deal application was a good way to get Barrow-in Furness to recover from Covid19. He also reported that at the Cumbria Transport and Infrastructure Strategy Board it was agreed that an Expression of Interest would be put forward for Barrow to become an electric bus town.	

ITEM	ACTION
26 – Minutes of the Last Meeting The minutes of the meeting held on 28th February, 2020 were agreed as a correct record. The Chairman and Michael Barry to discuss Action Tracking after the meeting.	Chairman Michael Barry
27 – Communication Update Sam Plum informed the Board that the Government had set up the #MyTown portal to enable residents to leave specific comments to inform the Town Deal Board. The Communications and Engagement Group have been promoting this link through social media channels and over 50 suggestions have been received. The themes coming out of the #MyTown portal would be used to focus more specific theme-based engagement, and would also be fed back the proposal leads to influence their development. Board Members were encouraged to share the portal link https://mytown.communities.gov.uk/ The group also did some work to produce a video to get people talking about what they love about Barrow and what they want to see change. The link to the video is https://vimeo.com/397209416/2437d751ce She reminded the Board that at its last meeting it had been agreed to develop branding and establishing a website and associated media channels to raise the profile of the Towns Deal. The #BrilliantBarrow logo and branding had been developed by the group and was considered by the Board. Alongside the strapline, a website was being developed. A link to the dummy website would be sent to all members of the Board. She requested any feedback by 24th April as the website would go live on 1st May. Together with the website, stand alone #BrilliantBarrow accounts on social media platforms would be established. That would be key to engagement in the coming months. Hatch Regeneris were also carrying out sentiment analysis across social media get a better understanding of perceptions of the area and get a feel for local concerns.	All Board members

ITEM	ACTION
Once the website had been approved and ready to launch social media would be used to promote and signpost residents to engagement activities. All partners were encouraged to cascade that through their media channels and ensure as much coverage of the engagement activity as possible. #MyTown portal would continue to be used to signpost, but also enable comments directly back to the Council through a dedicated email address:BrilliantBarrow@barrowbc.gov.uk The website would host emerging trends and help residents engage with the deal. It would also give a clear and transparent platform to provide updates on our proposals as they develop. That would be important to build understanding and momentum as it got closer to submit the bid and would and would also give a longer term platform to report on progress once successful. It was envisaged that specific engagement with stakeholders would be carried out through emerging platforms such as Zoom, Houseparty and Slido. #BrilliantBarrow Facebook account would also be used to live stream discussions and Q&A sessions. A further opportunity would be afforded by the network of community resilience support hubs, which were being established across the Borough. In order to assist those shielding and self-isolating a number of food distribution points had been established and would be managed in ward groups. The Board was mindful of the current situation, and that the approach needed to be flexible and scalable. The approach outlined would enable the Board to engage with residents in positive dialogue about the future of the town and how #BrilliantBarrow could continue to grow and develop in light of, and in response to coronavirus. The Board agreed:- 1. To agree the logo and website that had been created using the strapline #BrilliantBarrow; and 2. To agree the revised approach to communications and engagement set out in the report. **28 – Draft Socio-Economic Narrative** A detailed presentation was given by Hatch Regeneris on the Draft Socio Economic Narrative together with the Draft Appraisal Framework and Social Narrative.	All Board members

ITEM	ACTION
The Board was informed that to secure Town Deal funding, there was a requirement to prepare a well-evidenced Town Investment Plan. The role of the Plan was to set out a clear understanding of the area; focusing on its assets, opportunities and challenges. The purpose of the Socio-Economic Narrative report was to provide background, context and evidence of need to underpin the development of the Town Investment Plan. A draft of the report was considered with the main themes being:- Macro-economic drivers of change The prevailing policy environment Socio-economic challenges Assets and opportunities for growth The report concluded with identification of the strategic implications for the Barrow Town Investment Plan. The intelligence was important, both in validating the vision and objectives for the plan, but also supporting the creation of a project long list. Notwithstanding that appraisal, significant question remained about the short and long term impacts of COVID-19 and through the development plan, it would be important for that to be kept under ongoing review. It was intended that the report would be held in draft as the Town Investment Plan continued to develop. The Board considered seven Critical Success Factors. The Board were asked to consider whether the CSF was a sensible framework and how would it be applied. Jo Lappin asked how they were going to be assessed as some were about Gateway criteria and added value. The Chairman asked that ownership, sponsorship and support of the long lists be considered. Alison Hatcher stressed the importance of the Town Investment Plan clear on what the opportunities the deal would seek to capitalise on in addressing challenges within the town. The Board agreed to note the draft Socio-Economic Narrative.	

ITEM	ACTION
29 – Draft Appraisal Framework and Strategic Narrative The Board were informed that the development of the Town Investment Plan would need to take place on a staged basis, with the Government being clear that the development of the plan should be guided by a clear vision and objectives. At the Board on 28th February feedback and broad agreement was received for a vision and objectives to support the subsequent development of plan. Following the completion of the draft socio-economic narrative these were subject to a further validation process. The Board considered the vision as well as the updated objectives. The vision and objectives and evidential links to the Socio-economic narrative and underpinning their selection was considered by the Board. It was noted that the primary role of the Town Investment Plan was to secure Town Deal Funding for Barrow, in shaping proposals it would seek to consider all major funding programmes across the town (private and public) in order to present a comprehensive approach for the use of Town Deal funding. In establishing uses for Town Deal funding; the Government had been clear in their expectation that the development of the Town Investment Plan be supported by a prioritised set of interventions. To arrive at these it would be necessary to establish a clear assessment process. Central to such a process would be the establishment of a prioritisation framework through which schemes can be considered and a set of recommendations presented to the Town Deal Board. Appendix B to the report sets out the proposed approach to undertaking the work, setting out a consistent approach that could be applied to this, including options for weighing considerations. The Board agreed that a alongside a balanced approach number of options for the prioritisation of assessment criteria should be looked at; these include inclusion, strategic fit and transformative change. The Board agreed to consider the outcome of the assessment work at the meeting on 15th May 2020.	

ITEM	ACTION
30 - Draft Long List Michael Barry reminded the Board that at its meeting on 28th February 2020, it had agreed that a long list of prospective Town Deal projects would be identified. Once identified these could be tested through the appraisal framework. The development of the long list was over seen by the Plan Development Group and was considered by the Board. At present a total of 17 schemes had been defined and these were well balanced across the categories of investment defined by the Government:- Connectivity: 3 Skills and Business Environment: 7 Urban regeneration: 7 Following the definition of schemes, officers were currently undertaking the preparation of concept forms that could be used to test proposals through a prioritisation framework. It was noted that not all proposals need to receive Town Deal funding to move forward and through the assessment process consideration would be given to alternative funding streams. Consistent with that approach a wider review public and private opportunities would be incorporated as part of a holistic approach within the Town Investment Plan. A member of the Board commented that digital connectivity needed further clarification. The chair responded that some of the concepts need to mature and develop further. The Board agreed to note the draft long list. **31 – Town Investment Plan Programme** Michael Barry reminded the Board that since January 2020 work had been ongoing to progress the development of the Town Investment Plan. That had seen governance arrangements being put in place, the town deal boundary being agreed, a vision and objectives progressed, economist support subject to a tender exercise and a draft communications strategy developed.	

ITEM	ACTION
It was noted that guidance on the timescales and processes in developing the plan had been somewhat scant. In light of the COVID-19 crisis timescales had been reviewed and the conclusion had been reached that the target should remain July, which was nonetheless ambitious. The Board considered the latest interim programme supporting the development of the town investment plan. Pending further advice the following priority actions had been identified over the next four weeks:-: Finalisation of the communications plan and further stakeholder engagement; Finalisation of the socio-economic narrative; Due diligence on concept projects; Appraisal of prospective projects; Development of Town Investment Plan Skeleton At the May meeting of the Board it would consider the outputs and options emerging from these activities. During May the Plan would be developed further as well as continuing with community engagement. In June a draft plan would be presented together up an update of schemes and economic assessment of entire deal for submission in July 2020. The Board agreed to note the interim programme and priority over the coming four weeks for further discussion on 15th May 2020. **32 – Any Other Business** <u>Independent Panel</u> Jo Lapin informed the Board that a star chamber (Independent Panel) had offered to look at Copelands Town Deal submission prior to formal submission to Government. She offered the same facility for Barrow-in-Furness Town Deal. The Board agreed to accept the offer and asked Michael Barry to schedule the offer into the programme.	

ITEM	ACTION
<u>Feedback and Support</u> Sami Falou whether it was ok to feedback to his team that the proposed submission was scheduled for July as previously agreed. He asked whether there were any Investment Priorities that were going to be delayed due to Covid19. He also offered support to meet any deadlines. The meeting closed at 11.30 am.	

BARROW-IN-FURNESS TOWN DEAL BOARD	
Date of Meeting: 17 April 2020	
Reporting Officer: Chief Executive – Barrow Borough Council	

Title: Town Deal Board – Communications and Engagement Plan

Summary and Conclusions:

This paper updates the Board on the activity that has taken place since February. It resets the timeframe in light of the current national emergency and the need to flex our approach to respect social distancing guidance and instruction. The revised approach seeks to reach the widest number of stakeholders in a quality manner and in so doing help to ensure the creation of a well rounded set of proposals.

We are still awaiting receipt of the Government Communications Toolkit and will bring a revised Plan once this has been received.

Recommendations:

It is recommended that the Town Deal Board:

1. Provide feedback and agree the logo and website that has been created using the strapline #BrilliantBarrow.
2. Agree the revised approach to communications and engagement set out in this report.

Report

Background

As part of our Town Deal there is an expectation that plans are developed in consultation with the community looking to understand "what they love and how they want to see it grow" (Towns Fund Prospectus).

Recognising this, the Communications and Engagement group have been working on the Plan that was presented at the last Board. However, given the Coronavirus pandemic many plans for proactive engagement have been postponed. The group believed that the timing was simply not right to be promoting discussion about the future priorities of the town. At the same time the resource we were using to support the Group was diverted into doing

everything we could to support and protect our most vulnerable residents and that and to take priority over all else. As the crisis continues we need to think about sensitivities around pushing out positive communications, and we also need to have a different strategy to reach people via digital platforms rather than face to face engagement ativities.

Progress update

There has been some promotion of the online #MyTown portal through partner social media channels. The Government has set up the #MyTown portal to enable residents to find their town and leave specific comments. The Group members promoted the link through their networks to generate comments specifically about Barrow and to capture residents aspirations. This has led to over 50 suggestions being added to the portal. Hatch Regenesis are analysing the comments to date, and we will continue to promote this site as a good way for people to suggest what they want to see in their community. The themes coming out of the #MyTown portal will be used to focus more specific theme-based engagement, and will also be fed back the proposal leads to influence their development.

The link to the portal is https://mytown.communities.gov.uk/ We would encourage Board members to share the link within their networks to encourage more people to add comments and suggestions in the coming weeks.

The Group also did some work early on to produce a video to get people talking about what they love about Barrow and what they want to see change. The link to the video is https://vimeo.com/397209416/2437d751ce This is still a work in progress and we'll be adding text and highlighting our strapline of #BrilliantBarrow. When the current crisis is over we will use the video to kickstart our engagement activity through social media channels.

#BrilliantBarrow

At the last Board meeting we were tasked with developing our brand, and establishing a website and associated media channels to raise the profile of the Towns Deal, give it a specific Barrow focus and use it to set a bold, ambitious statement for the future of our town. The #BrilliantBarrow logo and branding has been developed by the Group. Attached at App 1

Alongside the strapline, a website is being developed and will be demonstrated at the meeting. This will host our Board agendas and papers in order to be accountable and transparent, but more than that it will be a space where we will share our proposals and projects as they are developed and ask for feedback from stakeholders. It will celebrate all that is already brilliant about Barrow, but will give a clear platform to develop a groundswell of support for our Deal.

Together with the website, we will establish stand alone #BrilliantBarrow accounts on social media platforms. This will be key to engagement in the coming months.

Hatch Regeneris are also carrying out sentiment analysis across social media get a better understanding of perceptions of the area and get a feel for local concerns. This again will help us to understand local feeling and will shape our future engagement.

Revised approach

Once website approved and ready to launch we will use social media to promote and signpost residents to engagement activities. We will want all partners to cascade this through their media channels and ensure as much coverage of the engagement activity as possible.

We will continue to signpost to #MyTown portal, but also enable comments directly back to the Council through a dedicated email address: BrilliantBarrow@barrowbc.gov.uk

The website will host emerging trends and help residents engage with the deal. It will also give us a clear and transparent platform to provide updates on our proposals as they develop. This will be important to build understanding and momentum as we get closer to submitting our bid, and will also give us a longer term platform to report on progress once successful.

It is envisaged that specific engagement with stakeholders will be carried out through emerging platforms such as Zoom, Houseparty and Slido. We will also use the #BrilliantBarrow Facebook account, using live streaming discussions and Q&A sessions. One example could be interactive sessions with proposal sponsors broadcasting lightning pitches and then taking questions live on air. Local radio and other media outlets will also be utilised.

A further opportunity is afforded by the network of community resilience support hubs, which are being established across the Borough. In order to assist those shielding and self isolating a number of food distribution points have been established and will be managed in ward groups. This will give us the opportunity to test the ward specific suggestions with community groups and leaders, in the areas where thy have been suggested. This will provide a better quality of engagement and will help localise engagement on specific issues.

We clearly need to be mindful of the current situation, and our approach will need to be flexible and scalable. We feel that, in time, a focus on the future and what we can do to rebuild our community and business resilience will be incredibly important but the timing is important. We feel the approach outlined above will enable us to engage our residents in positive dialogue about the

future our town and how we can continue to grow and development our #BrilliantBarrow in light of, and in response to coronavirus.

Outline timeframe:

20 April onwards. Launch website and social media platforms. Continue to promote #MyTown portal.

May. Develop proposal content for website. Test out proposals using a range of social media and more traditional media platforms. Use ward based community resilience hubs to engage around ward specific proposals

June. Refine and reiterate proposals in line with feedback and other suggestions. Carry out more in depth dialogue about specific proposals.

End.

Appendix A – logo

#brilliant barrow

V2

LOGO DESIGNS

Overarching logo Option One

Single colour

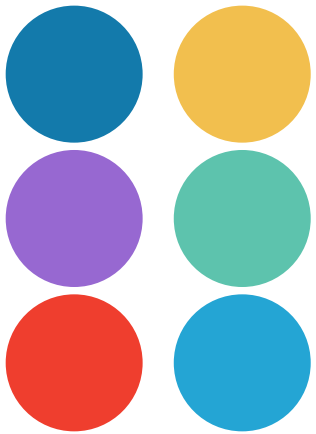
C86 M44 Y114 K12
R2 G118 B171
0276ab





Overarching logo Option One

Full colour and colour overlay







Overarching logo Option Two

Single colour

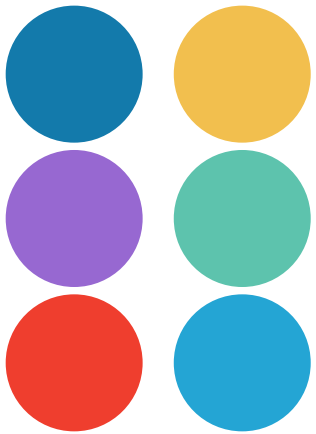
C86 M44 Y114 K12
R2 G118 B171
0276ab





Overarching logo Option Two

Full colour and colour overlay



#brilliant
BARROW

#brilliant
BARROW

Colour ways plus principal categories

C0 M90 Y90 K0
R230 G51 B35
e63323

#brilliant BARROW

#brilliant BUSINESS

#brilliant BARROW

#brilliant BUSINESS

Colour ways plus principal categories

C5 M25 Y80 K0
R244 G194 B69
#f4245

#brilliant BARROW

#brilliant CULTURE

#brilliant BARROW

#brilliant CULTURE

Colour ways plus principal categories

C60 M0 Y40 K0
R105 G192 B172
69c0ac

#brilliant
BARROW

#brilliant
ENVIRONMENT

#brilliant
BARROW

#brilliant
ENVIRONMENT

Colour ways plus principal categories

C57 M64 Y0 K0
R151 G104 B209
9768d1

#brilliant
BARROW

#brilliant
PEOPLE

#brilliant
BARROW

#brilliant
PEOPLE

Colour ways plus principal categories

C73 M16 Y8 K0
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#brilliant BARROW

#brilliant SPORT

#brilliant BARROW

#brilliant SPORT

#brilliant barrow

V2

LOGO DESIGNS

BARROW-IN-FURNESS TOWN DEAL BOARD	
Date of Meeting: 17th April 2020	
Reporting Officer: Place and Enterprise Manager – Cumbria CC	

Title: Draft Socio-Economic Narrative

Summary and Conclusions:

The Government are explicit that the development of the Town Investment Plan should be closely linked to a robust evidence base.

The socio-economic narrative seeks to provide this critical evidence; looking to quantify key issues and opportunities affecting the town and in so doing providing a clear foundation for the further development of the Town Investment Plan.

Recommendations:

It is recommended that the Town Deal Board:

1. Note and provide feedback on the draft Socio-Economic Narrative.

Report

Background

To secure Town Deal funding, there is a requirement to prepare a well-evidenced Town Investment Plan. The role of this is to set out a clear understanding of the area; focusing on its assets, opportunities and challenges.

The purpose of the Socio-Economic Narrative report is to provide background, context and evidence of need to underpin the development of the Town Investment Plan. A draft of this report is provided as Appendix and this considers:

- Macro-economic drivers of change
- The prevailing policy environment
- Socio-economic challenges
- Assets and opportunities for growth

The report concludes with identification of the strategic implications for the Barrow Town Investment Plan, noting:

- Barrow has significant sector strengths in advanced manufacturing and energy which will drive productivity and earnings growth. Barrow needs to ensure it has a supportive business environment in place to facilitate growth and maximise opportunity
- Barrow is highly dependent on a small number of major employers, and there is a need to support diversification and resilience in the economy. These employers have a role to play in facilitating economic and social value in Barrow as anchor institutions in the town
- Barrow faces a significant demographic challenge and needs to retain and attract talent to fulfil the potential of major projects in the town and drive competitiveness
- Barrow has a higher skills gap which is a barrier to local people accessing the jobs of the future
- There is a net outflow of young people from Barrow, and this needs to be stemmed through strengthened progression pathways to education and employment within the town
- Barrow has stark levels of deprivation and inequalities which undermine quality of life and life chances
- Peripherality is a feature of the Barrow Travel to Work Area. Opportunities to enhance transport infrastructure and embrace digital technologies will help to offset this barrier to growth
- Barrow has an affordable housing offer but the condition of stock is a concern, and the lack of aspirational housing is a barrier to attracting higher skilled people to live in the town
- Barrow has a struggling town centre characterised by high vacancy rates and a leakage of spend outwith the area. Barrow needs to drive vitality and diversify uses in the town centre to attract people into the area
- The complexity of need and opportunity in Barrow requires a collaborative response by public services to drive transformation and inclusive growth in the town
- Barrow has a number of key investment sites centred around the town centre and Barrow Island. Together these present clear opportunities to lever significant inward investment to the town and have the potential to anchor further regeneration.

This intelligence is important, both in validating the vision and objectives for the plan, but also supporting the creation of a project long list. Notwithstanding this appraisal, significant question remain about the short and long term impacts of COVID-19 and through the development plan, it will be important for this to be kept under ongoing review.

It is intended that this report will be held in draft as the Town Investment Plan continues to develop. Supporting this process, the Board are now asked to provide feedback on this report, this will be used to support its further development as it is moved to finalisation.

End.

Appendix A – Draft Socio-Economic Narrative

Barrow's Socio-Economic Narrative



A Report – Draft

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Picture credit: Barrow Borough Council

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Introduction

Barrow has been identified as one of 101 places across England that can secure access to the £3.6bn Towns Fund. The Fund will be allocated through Town Deals which could see up to £25m of new investment being delivered to Barrow. Each town must develop a well-evidenced Town Investment Plan which sets out a clear understanding of the area, focusing on its assets, opportunities and challenges. The amount of investment secured from the Towns Fund will be determined based on the strength of the Town Investment Plan, amongst other factors.



The purpose of the Socio-Economic Narrative report is to provide background, context and evidence of need to underpin the development of the Town Investment Plan. It is also expected that this report will be used for wider purposes outside of the Town Investment Plan.

The report considers:

- Macro-economic drivers of change
- The prevailing policy environment
- Socio-economic challenges
- Assets and opportunities for growth

The report concludes with identification of the strategic implications for the Barrow Town Investment Plan through a SWOT of each Town Deal theme. **Specifically, the report concludes by validating the 10 strategic objectives established by the Town Deal Board.**

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Barrow – A Town of Distinction

The opening of the Furness Railway in 1846 was the first significant step which drove the phenomenal growth of Barrow-in-Furness from a small agricultural community of circa 150 residents to a population of 45,000 by 1879. The railway was built to transport iron ore from nearby Dalton and slate from Kirkby to the port at Barrow. The creation of a local ironworks and blast furnaces in1859, followed by a steel plant in 1865, drove Barrow's subsequent growth for the next 30 years.



As competition and diminishing returns made Furness ore extraction and steel making more expensive, Barrow transformed itself from a steel town to a shipyard town, facilitated by Barrow's natural attributes including a tidal port and the availability of steel. The town developed into a significant producer of naval vessels, with a specialism in submarines. The onslaught of World War 1 accelerated population growth further, reaching a peak of 90,000 residents in 1917.

The ironworks closed in 1963, followed by the steelworks in 1983. The shipyard continues to be the dominant industry in the town to this day, and the cyclical nature of military spending contracts has contributed to peaks and troughs in the workforce over time, with a significant downturn at the end of the Cold War in 1991 contributing to high levels of unemployment in the town and population decline as the workforce shrank to 5,800 in 1995.

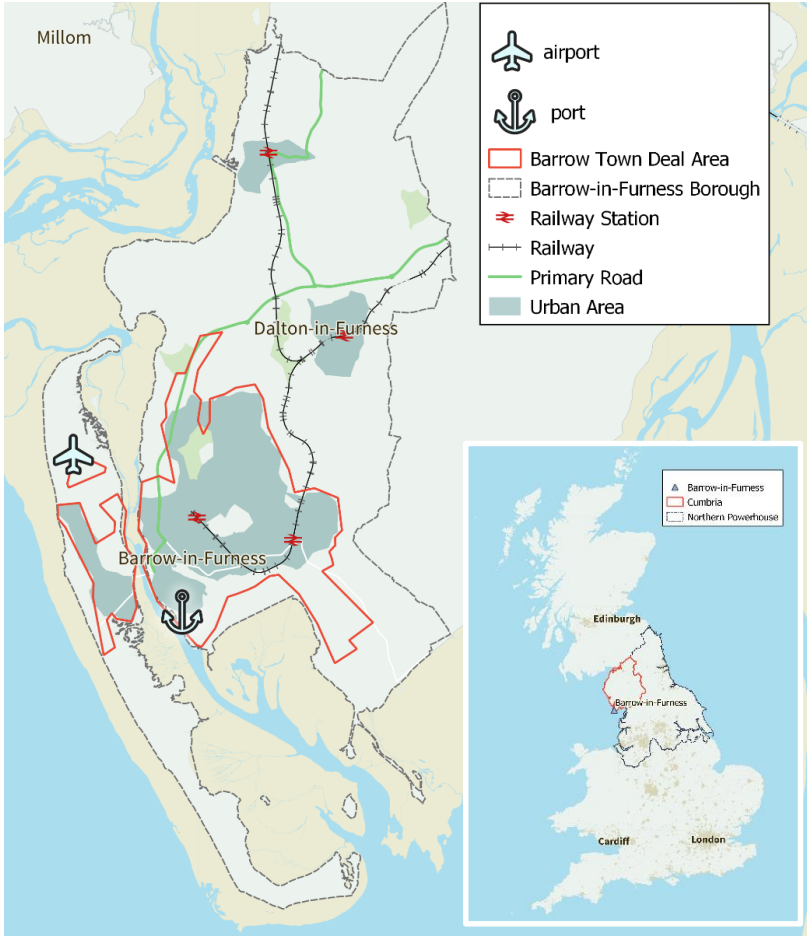
Under the auspice of BAE Systems Maritime, Barrow is now at the centre of the national defence programme to develop a new generation of nuclear deterrent submarines (the £40bn Dreadnought programme) which will see the site occupied to 2050 and **places Barrow at the forefront of shipbuilding and innovation in the UK**. There are currently some 8,500 workers directly employed by BAE Systems in Barrow in addition to a large contractor workforce and indirect jobs created through the supply chain. Barrow has a growing economy, underpinned by this world class marine offer, and advanced manufacturing, energy and offshore industries.

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Source: Heritage Impact Assessment, 2018; Photo credit: BAE Systems

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Spatial Context



Barrow is located at the southern tip of the Furness Peninsula in south Cumbria, and is strategically connected by:

- **Road:** with the A590 linking Barrow to the M6 and Kendal, and the A595 linking Barrow to the west coast
- **Rail:** with the Furness line extending from Barrow to Lancaster and onwards to Manchester and London, and the Cumbrian Coast line connecting Barrow to Carlisle
- **Sea:** with cargo shipping services operating from the Port of Barrow
- **Air:** BAE Systems own Walney Airfield, connecting Barrow to locations across the UK for use by BAE Systems, MoD, and industry partners

The Barrow Town Deal (BTD) area covers the urban core of Barrow, as well as parts of Walney Island and the urban fringe to the east of Walney Channel.

Barrow borough is home to 67,100 residents, of which 77% reside within the BTD area. The town hosts 31,430 jobs, of which 89% are within the BTD.

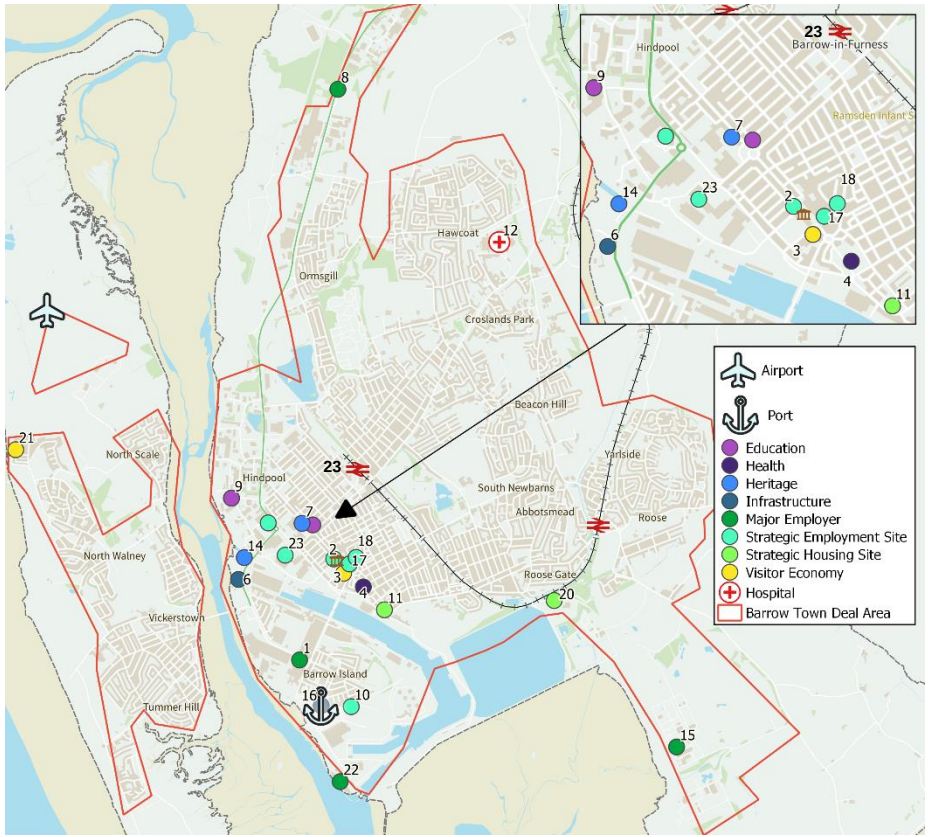
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Barrow – A Town of Opportunity

No.	Name	Description and Drivers of Change
1	BAE Systems	Major employer responsible for delivery of Britain's fleet of nuclear submarines driving significant investment into the town.
2	Furness Building Society	Redevelopment opportunity - former HQ for mixed use (4,080sqm)
3	Holiday Inn Express	£13m invested to convert former Police Station to 217 room hotel
4	Alfred Barrow Health Centre	Opened November 2019 after £14 million refurbishment
5	Barrow Central Library	£1.2 million investment from CCC to modernise and expand offer
6	North Road Upgrade	£6 m invested to boost capacity
7	Central Barrow Conservation Area	Heritage area recognised by Historic England
8	Kimberley Clark	£85m expansion to Barrow site approved December 2019
9	Furness College	Further Education College providing a wide range of A levels, vocational education and skills training, including training apprentices for BAE Systems
10	Barrow Waterfront Business Park	£200m multi-faceted development including new business park and infrastructure
11	Marina Village	Major housing development site with the potential to deliver between 450 and 600 new homes
12	Furness General Hospital	The largest single employer in the town after BAE systems
13	Barrow Advanced Manufacturing Training Centre	£3.38m 14,000 sq ft centre to host engineering and advanced manufacturing research, based at Furness College
14	Dock Museum	50,000+ visitors per year, exhibitions on industrial history of Barrow
15	Rampside Gas Terminal	Major gas terminal employing around 400 people
16	Port of Barrow	Key servicing point to the offshore and nuclear sector in Cumbria. A new masterplan is being developed for the Port.
17	Barrow Town Hall & Market Square	Grade II* listed buildings at the core of the town centre. FHSF fund proposals to support investment in surrounding opportunity areas
18	Dalton Road and Town Centre Retail	Pedestrianised retail and leisure core of the town centre
19/23	Hollywood and Hindpool Retail parks	Part of a cluster of some thirty stores and leisure facilities in the Hindpool area, accounting for 43,000 m2 of commercial space
20	Salthouse Mills	8ha opportunity site, identified in the local plan for housing
21	Walney Coast (Earnse Bay)	Important leisure and visitor asset
22	O&M Base	Home to five O&M bases at the Port of Barrow supporting the offshore windfarm developments in the Irish Sea including Orsted and Vattenfall
23	Barrow Station	Increasingly connected to other regions, with direct services to Manchester Airport

Barrow has a number of strategic assets and proposed investments which provide a platform for growth.



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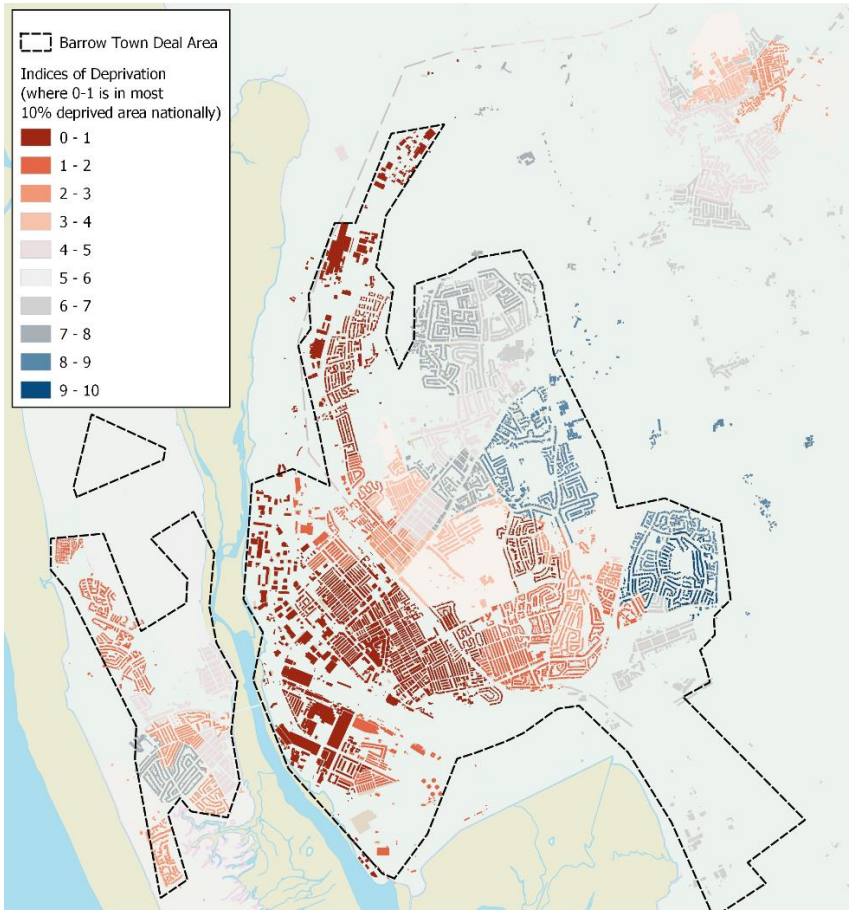
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Barrow – A Tale of Two Towns

Despite recent economic growth, Barrow has the largest concentration of worklessness, people with poor skills and health, and poor housing in Cumbria. Parts of the town are significantly affected by high levels of deprivation which feature within the 10% most deprived nationally, including concentrations in parts of the Town Centre, Hindpool, Ormsgill, Barrow Island and Abbotsmead. As explored within this report, Barrow is characterised by acute deprivation and socio-economic challenges, including:

- Population decline and a net exporter of young people
- A dearth of higher level skills which contribute to a significant skills gap undermining business competitiveness
- Generational worklessness and barriers to labour market participation
- Significant health inequalities characterised by lower levels of life expectancy, child health issues including obesity and teenage conception, and adult health issues including alcohol related harm
- Poor housing conditions, particularly amongst the private sector stock

The Town Deal will play a crucial role in facilitating an inclusive economy in Barrow.



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Macro-Economic Context





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Summary Implications – Macro-Economic Context

Barrow is a town which is **particularly susceptible to macro-economic forces** because of its dependence on a small number of large employers whose fortunes are heavily influenced by national policy. Summary implications include:

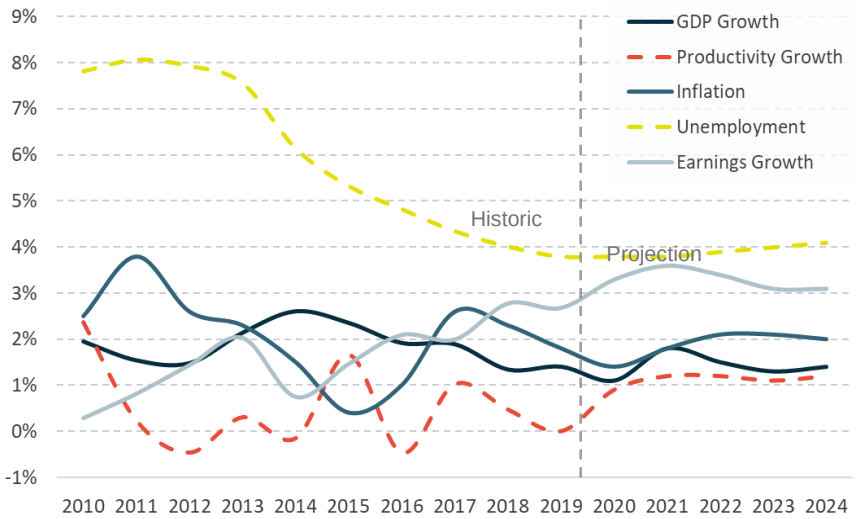
+ Recent macro-economic indicators highlight buoyant conditions in the UK characterised by falling unemployment, steady (if volatile) productivity growth, and earnings growth accompanying inflation
+ The impact of EU Exit, combined with the impact of the recent pandemic, casts **considerable uncertainty over the future economic outlook** for the UK
+ **Barrow is particularly exposed to external forces**, including government policy decisions linked to important sectors in the town which include defence, energy and health
+ The impact of unknown influences can be considerable, as shown by the global slowdown caused by the COVID-19 pandemic. The impact is clearly visible through surging unemployment, business closure, and the demands placed on an already overburdened health system. A global recession is expected and planned increases in public spending will become a priority driving the **restructuring of the economy** in the wake of the pandemic.
+ Barrow is somewhat more resilient than other areas of the UK due to the industrial composition of the town, with major government contracts supporting investment. However **the health and societal impacts of the pandemic are considerable**, with Barrow identified as one of the 25% most exposed authorities in England on health and income deprivation measures.

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Macroeconomic drivers

The chart below shows the annual change of five key macroeconomic indicators since 2019 for the UK, with their projected change from 2020 as included in the recent Spring Budget. The current forecasts do not account for the impact of Covid19. Whilst the impact of the virus will be significant, these trends will remain fundamental drivers of the economy in the long term.



Since 2013 most indicators have performed positively. An exception to this is productivity growth, which has been more volatile. Unemployment has steadily reduced, inflation has consistently been close to the 2% target, with growth in earnings generally keeping pace. Whilst GDP growth has been modest by historic standards, it has been consistently above 1% each year.

The current forecasts project these positive outcomes to broadly continue. Unemployment will remain virtually constant, earnings growth will grow above inflation, and GDP and productivity will continue steady growth.

However, the forecasts must be treated with some caution, especially given the rapidly developing impact of Covid-19 on the economy. Of the five indicators, a great deal of new uncertainty surrounds GDP and productivity growth. This is because of the compounding effect of both the virus and Brexit, which will directly affect these indicators. Pre-virus, GDP and productivity were projected to grow between 1-2% each year to 2024, based on the optimistic outcome of obtaining a free trade agreement with the EU by the end of the transition period.

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External Influences

The Barrow economy is affected by a range of external influences including:

- **Government policy decisions**, particularly in relation to defence, energy and health, and UK policy decisions related to Brexit
- **Environmental factors**. Climate change will have important economic effects. The impact of flooding in particular is a key issue in many parts of Cumbria.
- **Brexit**. The sectors with the highest exposure to Brexit in Cumbria include tourism, agriculture, and of key relevance to Barrow a variety of export focused manufacturing sectors.

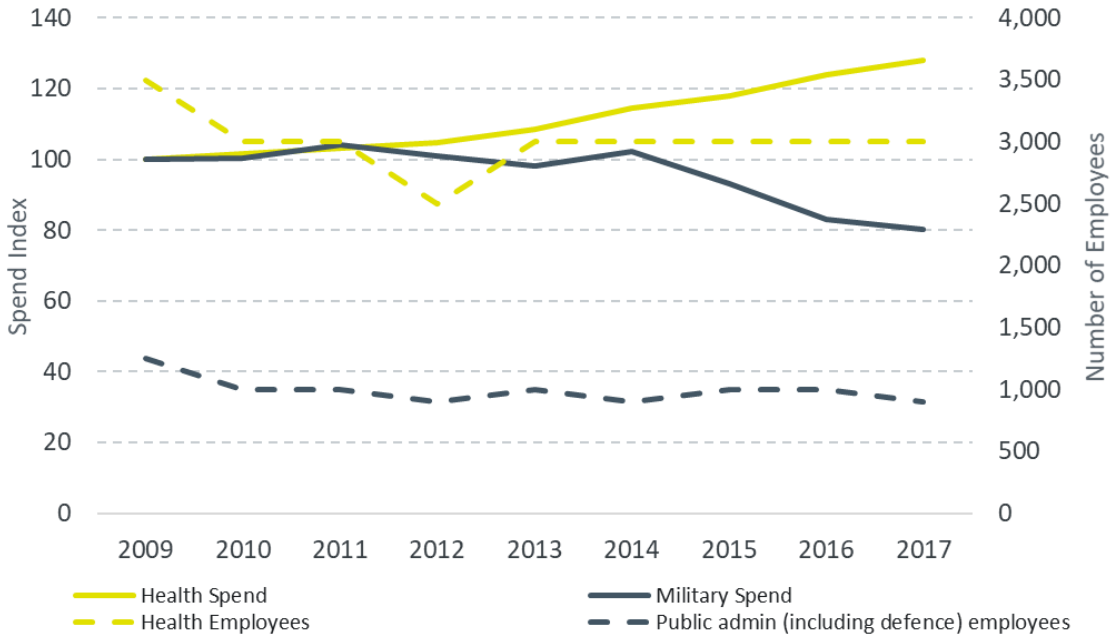


The **impact of unknown influences** is particularly pertinent in light of the current pandemic. Whilst resources are diverted away from more productive uses (in terms of economic output) and towards essential measures to combat the virus, GDP and productivity could be directly affected, whilst drafting and agreeing a trade deal with the EU is deprioritised.

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External Influences - Government Policy Decisions



The adjacent chart plots the number of people employed in health activities and public administration (including defence) in Barrow since 2009. Two lines are also included that show the trend in government health and military expenditure.

Government health expenditure and health related employment in Barrow have a more mixed relationship. Government health expenditure has risen gradually over the period, whilst the number of health employees in Barrow reduced sharply after the 2008 recession, before picking up in 2012 and plateauing thereafter. Of themselves, these trends do not suggest an interdependent relationship, but are consistent with one, especially given the fact that post-recession spending cuts affected different parts of the country in different ways.

Government military expenditure and public administration (including defence) employment in Barrow follow more similar trends since 2009. Both decline by a substantial proportion over the period, showing a similar cycles of growth and contraction. This suggests public sector and defence employment in Barrow is significantly influenced by government expenditure decisions.

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External Influences – COVID 19

Hatch Regeneris have collated data under three themes, economic, societal and health, to assess the exposure of local authorities across England to the socio-economic impact of Covid-19. Based on each indicator, those Local Authorities in the top 25% have been classified as 'Most Exposed', those in the middle 50% have been classified as 'Exposed' and those in the bottom 25% have been classified as 'Least Exposed'.

The adjacent tables include the exposure ranks for each local authority in Cumbria, allowing us to see Barrow's exposure relative to all authorities in England and how it compares to neighbouring areas.

Looking at economic exposure to Covid-19 (based on the sectors mandated to close by the government), as well as levels of self-employment (included because of the less robust governmental support available) Barrow is relatively unexposed.

However, on societal and health based measures Barrow is more exposed. The borough has a relatively high proportion of people who do not use the internet, meaning that important updates could take longer to reach all of the population. Also, with high levels of income and health deprivation, the physical and financial toll of the disease could be especially heavy on Barrow.

Economic exposure

Local Authority	% of businesses impacted by Covid19	% of employment impacted by Covid19	% self-employment
Allerdale	Exposed	Most Exposed	Exposed
Barrow-in-Furness	Exposed	Least Exposed	Least Exposed
Carlisle	Exposed	Exposed	Exposed
Copeland	Least Exposed	Least Exposed	Exposed
Eden	Least Exposed	Most Exposed	Most Exposed
South Lakeland	Most Exposed	Most Exposed	Most Exposed

Health exposure

Local Authority	% Aged 70+	Health Deprivatation Rank	Population Density
Allerdale	Most Exposed	Most Exposed	Least Exposed
Barrow-in-Furness	Exposed	Most Exposed	Least Exposed
Carlisle	Exposed	Most Exposed	Least Exposed
Copeland	Exposed	Most Exposed	Least Exposed
Eden	Most Exposed	Least Exposed	Least Exposed
South Lakeland	Most Exposed	Least Exposed	Least Exposed

Societal exposure

Local Authority	% of premises without decent broadband	% who do not use internet	Income Deprivation Rank	Minutes to nearest food shop (PT/walk)
Allerdale	Least Exposed	Most Exposed	Exposed	Most Exposed
Barrow-in-Furness	Least Exposed	Most Exposed	Most Exposed	Least Exposed
Carlisle	Least Exposed	Exposed	Exposed	Most Exposed
Copeland	Least Exposed	Most Exposed	Exposed	Most Exposed
Eden	Most Exposed	Exposed	Least Exposed	Most Exposed
South Lakeland	Least Exposed	Exposed	Least Exposed	Most Exposed

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Policy Environment





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Summary Implications – Policy Environment

The Barrow Town Investment Plan is informed by the prevailing policy environment as summarised below.

- Barrow features strongly in the Cumbria Local Industrial Strategy, and is a **major player in driving growth in key sectors** such as **advanced manufacturing, health and social care, and energy**. The strengths and challenges presented by Barrow are well understood by the Local Enterprise Partnership and the County Council, and there is support for the realisation of major projects to deliver inclusive growth
- Barrow has a role to play in **closing the productivity gap** that exists in the UK as part of the national industrial strategy, and as a **major player in the UK offshore industry** the town has a key role to play in responding to the Grand Challenge of Clean Growth
- The NP11 Energy and Clean Growth Strategy is **well aligned with the opportunities present in Barrow** including offshore wind, nuclear, and maximising tidal resources
- The policy imperative to **facilitate local people to access better quality jobs and increase spend in** the Barrow area is clear within Cumbria County Council and Barrow Borough Council policy priorities
- There is Council support for **prioritising the infrastructure required to facilitate economic growth** and maximise opportunities from large scale projects, with a series of identified priorities including transport and digital improvements, and support for the delivery of housing and employment sites

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Strategic Context

Town Investment Plans need to demonstrate strong alignment with Local Industrial Strategies. The opportunities and challenges identified in Barrow align directly with those outlined in the Cumbria Local Industrial Strategy.

Cumbria Local Industrial Strategy, 2019

The LIS establishes a vision of Cumbria as a "*place to live, work, visit and invest sustainably – where exceptional industry and innovation meets a breathtakingly beautiful and productive landscape*". LIS priorities include:

+ Promoting Cumbria
+ Innovation and Ideas
+ People and Skills
+ Business Environment
+ Infrastructure
+ Places

Key sectors include advanced manufacturing, construction, creative, digital and cultural, health and social care, logistics, nuclear, professional services, rural & food production, and visitor economy.

Identified strengths in Barrow include manufacturing excellence in shipbuilding/submarine/sub-sea technology; offshore wind and oil and gas; and important port assets serving the energy sector.

Identified challenges include the need to diversify the economy of Barrow-in-Furness. The dependence of Barrow on BAE Systems and government spending, in addition to the concentration of workless households, youth unemployment, low skills and low household incomes, below average rates of enterprise, transport resilience issues, a large concentration of poor quality housing stock, and a relatively small retail catchment.

Identified opportunities in Barrow include:

- Supply chain opportunities linked to BAE
- Tidal power potential in Morecambe Bay
- Scope for gas storage and import
- Barrow Waterfront Business Park
- Barrow Marina Village
- Potential for a new Advanced Manufacturing Innovation District

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Strategic Context

UK Industrial Strategy, 2017

The UK Industrial Strategy seeks to create an economy that boosts productivity and earning power throughout the UK, underpinned by five foundations of productivity:

+ Ideas – the world's most innovative economy
+ People – good jobs and greater earning power for all
+ Infrastructure – delivering a major upgrade to the UK's infrastructure
+ Business Environment – the best place to start and grow a business
+ Places – providing prosperous communities across the UK

The Industrial Strategy responds to four identified grand challenges:

+ Putting the UK at the forefront of the AI and data revolution
+ Maximising the advantages for UK industry in the global shift to clean growth
+ Becoming a world leader in shaping the future of mobility
+ Harnessing the power of innovation to help meet the needs of an ageing society

Barrow has a role to play in closing the productivity gap that exists in the UK.

Northern Powerhouse Strategy, 2016

The Northern Powerhouse Strategy establishes a vision for "*joining up the North's great towns, cities and counties, pooling their strengths, and tackling major barriers to productivity to unleash the full economic potential of the North*".

Relevant priorities include:

+ Improving connections between towns and cities in the North
+ Improving educational standards and skill levels across the region
+ Ensuring the North continues to be an excellent location to undertake R&D, develop innovative ideas and start and grow a business

Identified **strengths** of the North include manufacturing, pharmaceuticals, energy and digital sectors.

Identified **challenges** of the North include lagging productivity compared to the South; poor connectivity limiting the reach of northern cities' labour markets, wages and productivity; lagging innovation and enterprise; and a lower proportion of highly skilled workers.

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Strategic Context

Transport for the North, Strategic Transport Plan, 2019

The Strategic Transport Plan establishes a vision of a "*thriving North of England, where world class transport supports sustainable economic growth, excellent quality of life and improved opportunities for all*". The plan seeks to better connect people, business and markets thereby:

+ Transforming economic performance
+ Increasing efficiency, reliability, integration and resilience in the transport system
+ Improving inclusivity, health and access to opportunities
+ Promoting and enhancing the built, historic and natural environment

The STP seeks to deliver improved rail links between major towns and cities, encouraging investment in rail lines, stations and services; strengthen major road networks; improve local and sustainable transport; and facilitate integrated and smart travel.

Borderlands Inclusive Growth Deal

The Borderlands Inclusive Growth deal includes Cumbria, Northumbria, Dumfries & Galloway and the Scottish Borders. There has been a funding commitment of £394.5m by UK, Scottish Government and local authority partners to deliver interventions that will narrow the productivity gap; increase the working age population; and deliver inclusive growth. The proposed interventions will generate around £1.1bn of GVA uplift and deliver around 5,500 jobs. Interventions include:

- Quality of place – repurposing towns to create vibrant and resilient places
- Destination – improving the cultural and leisure offer to increase the attractiveness of places
- Business infrastructure – supporting business growth
- Digital – improved digital infrastructure

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Strategic Context

NP11 Energy and Clean Growth

NP11 brings together the 11 northern LEPs, working collectively for the benefit of the north. Collectively, the North's industry, capabilities, energy infrastructure and location position the region to respond to the UK's target of becoming Net Zero carbon by 2050. Clear opportunities for the North of England to build on its history in energy production are identified, including:

- Offshore wind
- CCUS and hydrogen
- New nuclear
- Energy efficiency in homes
- Hydrogen for low carbon transport and heating
- Low carbon transport (electric vehicles)
- Low carbon / circular economy sector

The study identifies the importance of enabling factors including utilities networks and smart grid distribution networks to facilitate energy transition; innovation, research and skills; green financing and governance, policy and planning.

The actions for NP11 and government to secure these opportunities are identified. These include deployment of new projects; secure local value in new projects; ongoing innovation; and pursue export opportunities.

The **role of Cumbria in the NP11 Energy and Clean Growth agenda is notable**, including:

- accounting for more than 20% of UK offshore wind generation, and home to the largest offshore wind farm in Europe was noted, with global companies like Orsted investing in research and innovation
- the importance of the nuclear sector as a major employer, with world class research and development facilities for nuclear technology facilitated through Cumbria's Nuclear Arc consortium

Future opportunities identified include:

- The potential to develop small modular reactors at existing nuclear sites in the county including Sellafield and Barrow
- Tidal range energy resources i.e. in Solway and Morecambe

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Strategic Context

Cumbria's Economic Ambition

Cumbria's Economic Ambition establishes a vision to "*exploit opportunities that build on the County's strengths and natural assets, and through its leadership, will put in place the building blocks to create an inclusive and prosperous economy*".

Relevant key priorities include supporting advanced manufacturing opportunities, including increasing the scope for local people to access high value jobs, live close to where they work, and increase spend in the Barrow area.

Identified challenges include: lagging productivity, rapidly ageing population structure, above average precarious employment, below average earnings, incidence of youth unemployment and concentrations of deprivation, skill gaps and shortages, dependence on limited number of key sectors/employers, including the public sector; housing affordability challenges in some areas; and vacancies in retail floorspace.

Cumbria Infrastructure Plan

The Cumbria Infrastructure Plan prioritises the infrastructure needed to facilitate economic growth and maximise opportunities from large scale projects over the next 15 years.

Identified priorities in relation to Barrow include:

- A590 corridor enhancements
- Flood resilience and mitigation
- Port of Barrow improvements
- Connecting Cumbria Phase 3: 4G and Broadband connectivity
- Cumbria Coastal Railway Enhancements
- Rail Station improvements
- Town Centre transport improvements
- Support for the delivery of key housing and employment sites including Barrow Waterfront Business Park and Marina Village

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Strategic Context

Barrow Borough Local Plan 2016-2031

"*By 2031 Barrow Borough will be a place where a thriving diverse economy is supporting strong inclusive, active communities. There will be an improved housing offer, where everyone has access to a decent home, education, skills and job opportunities. There will be high quality open spaces and leisure facilities and vibrant town centres with a strong retail offer. The built and historic environment will be of a high quality and heritage assets will be protected and enhanced. Health and well-being will have improved in the Borough and the natural environment, landscape and soils will be protected and enhanced. Resources will be managed sustainably and waste and pollution minimised*".

The Local Plan establishes the **vision for the economy** of Barrow, to include:

- A leading and pivotal role in West Cumbria's economy with sustainable economic growth based on a highly skilled workforce operating effectively in national and international markets
- An attractive place for local people, investors, businesses and tourists
- The number, variety and quality of employment opportunities will have increased to create a more diverse economic base for the area
- New business start up and inward investment are encouraged
- Local people have the skills and expertise to access jobs created

A series of policies underpin this vision.

There are a number of complementary initiatives underway in Barrow which the Town Deal will align with, including a Future High Street Fund bid, Heritage Action Zone bid, and a Homes England LAAC bid, in addition to other investment opportunities.

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Socio-Economic Challenges







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Summary Implications – Socio-Economic Challenges

The Barrow Town Investment Plan responds to a series of socio-economic challenges which will drive future economic prosperity.

+ Barrow needs to **grow more jobs for local people** as demonstrated by a lower than average job density ratio (as measured by jobs to residents aged 16-64)

+ **Employment has grown steadily in recent years**, with 3% more jobs in the borough driven by gains in the manufacturing and retail sector in particular. On the basis of the most recent projections (pre Covid-19) **zero net employment growth is expected**.

+ **Barrow is a highly productive economy**, driven by gains in high value advanced manufacturing activity, however the benefits of this economic growth have been **unevenly spread**. Barrow has a role to play in support the Local Industrial Strategy ambitions for growth in key sectors including advanced manufacturing, health and social care, and energy.

+ Barrow's **future prospects are heavily dependent on a small number of large employers** whose fortunes are closely tied to central government policy decisions. These anchor institutions, including BAE Systems and Furness General Hospital, have a pivotal role to play **in levering good growth outcomes** in the town, including local supply chain development, positive procurement practices and apprenticeship development.

+ Barrow faces a **demographic challenge**, characterised by a declining and ageing population which is forecast to continue. There is a net out flow of young people from the town. Barrow attracts a net inflow of daily commuters, and is characterised by a substantial 'tidal' workforce who commute into the town during the week and leave again at weekends.

+ Labour market participation levels in Barrow are low, and unemployment rates are above average. The **economic inactivity rate is stark**, at 12 percentage points higher than the national average. Long term sickness is a notable contributing factor.

+ There is a mismatch between the occupations and qualifications of Barrow's residents and the workforce and this is widening over time. Labour market projects anticipated **continued demand for higher level occupations** in Barrow.

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Summary Implications – Socio-Economic Challenges (cont'd)

- **Barrow is a recognised HE cold spot**. Participation in HE by age 19 in Barrow is 28% compared to 40% in England. However, there is greater propensity towards apprenticeship destinations in Barrow which could, in due course, support further progression to higher level qualifications. Barrow has a strong FE offer, and an emerging HE offer which can support the development and attraction of talent to the town.
- A large proportion of Barrow's Town Deal area is **highly deprived**, with 30% of LSOAs featuring in the 10% most deprived nationally. Characteristics of deprivation include income deprivation affecting children and health deprivation. Children living in workless households are a strong feature, and **social mobility is relatively low** in the town.
- Barrow's coastal peripheral location contributes towards a relatively self contained travel to work area. The **poor connectivity** hampers the ease of accessing employment opportunities both within, and outside, the town.
- Barrow has a **strong natural capital offer** to support tourism and leisure activity, and facilitate health and well-being.
- Barrow is relatively well-served by digital connections, however opportunities to **tackle not-spot locations** should be sought.
- Barrow provides good access to affordable housing, however **housing choice is limited**, and the **condition of private sector stock is markedly poor** posing health and safety hazards.
- The industrial market in Barrow has experienced buoyant conditions of late, and there are **supply limitations** in the existing industrial offer. The **retail market is challenging** in Barrow, with high vacancy rates and declining rents.

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The Productivity Challenge
Summary of the Economy

In 2018 Approximately 33,000 people are employed in Barrow, up 3.1% from five years previously. The Barrow Town Deal area (BTD) accounted for at least 28,000 jobs (84% of the borough's total in 2018). Barrow has a below average job density, at 0.8 jobs per resident aged 16-64 relative to 0.87 in England. The town hosts 1,925 businesses, but in contrast to national trends has experienced a contraction in the business base of -4.2% over the past five years.

Barrow generates a GVA of £1.53** billion per annum, which equates to £60,400 per FTE. Although this exceeds Cumbria's GVA per FTE of £53,300, it is comparatively lower than the national average of £66,300.

Summary of the Barrow Economy

	Barrow	Cumbria	England
Total jobs, 2018	33,000	276,000	26,842,000
Job Density (Ratio of total jobs to 16-64 residents)	0.80	0.93	0.87
Employment change (2013-2018)	3.1%	3.4%	10.7%
No. of Businesses, 2019*	1,925	23,670	2,360,800
Business change (2015-2019)*	-85 (-4.2%)	1.2%	11.6%
GVA, 2018**	£1.53 billion	£10.27 billion	£1.42 trillion
GVA per FTE worker**	£60,400	£53,300	£66,300
Productivity growth (2014-2018)**	13.5%	4.7%	9.5%

Source: BRES, ONS, 2019; UKBC, ONS, 2019; Regional GVA (Balanced), ONS 2019 * Figures rounded to the nearest 100.** Real estate activities removed.

The Productivity Challenge
Size of the Economy

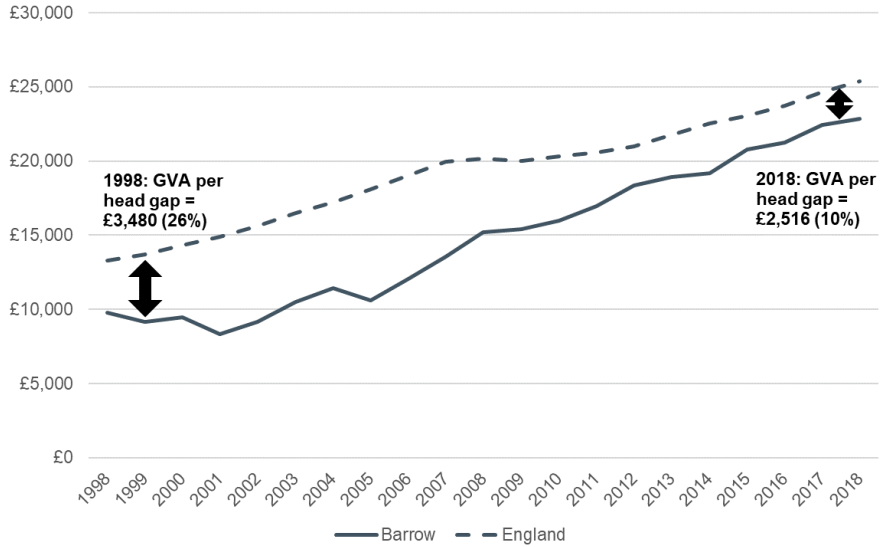
Barrow's economy is distinctive in that it has seen its productivity gap per head narrow relative to the national average over the past ten years. The productivity gap in GVA per head between Barrow and England narrowed from £3,480 in 1998 to £2,516 in 2018, which has been driven by productivity gains in sectors such as advanced manufacturing.

However, the benefits of this economic growth have been unevenly spread, with stark inequalities exhibited amongst the residential population of the Town Deal area.



Source: Regional GVA (Balanced), ONS, 2019; Population Estimates, ONS, 2019

GVA per head* (£), 1998-2018

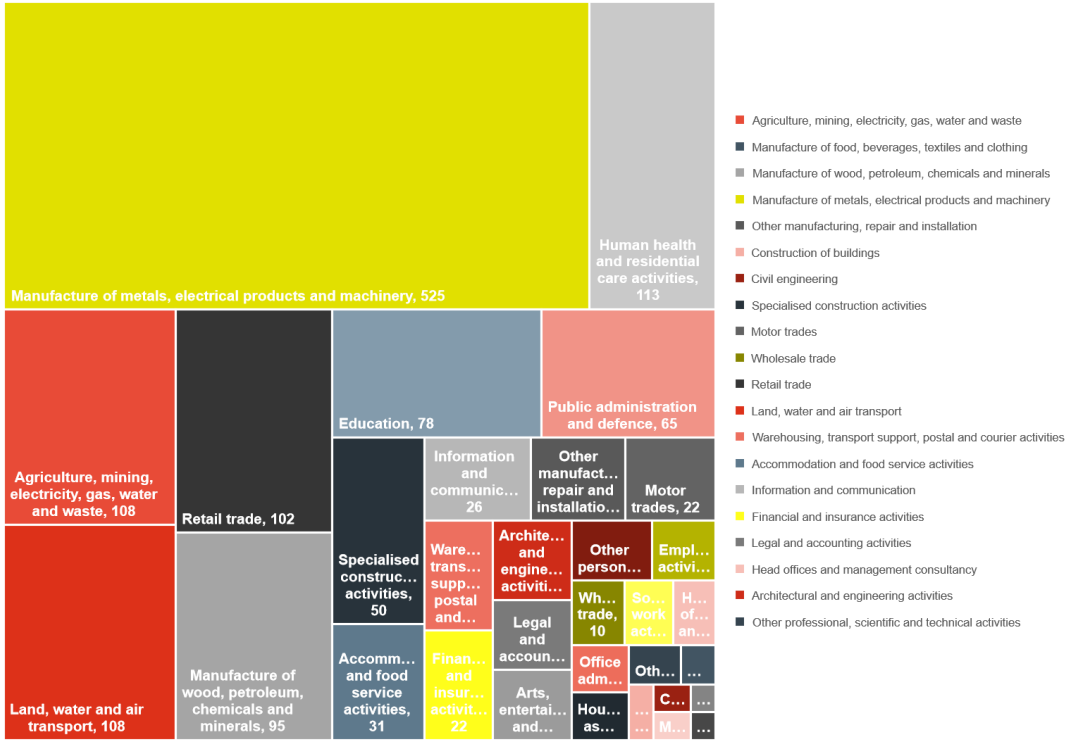


* Real Estate Activities are excluded.

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The Productivity Challenge
Composition of the Economy

GVA by Industry, 2018 (£m)



Barrow has a unique economic composition with strong specialisms in manufacturing which has driven the high levels of productivity growth over the past 5 years. The top five contributors to Barrow's GVA are:

+ Manufacture of metals, electrical products and machinery (£525m and 34.3% of total)
+ Human health and residential care activities (£113m and 7.4% of total)
+ Agriculture, mining, electricity, gas, water and waste (£108 million and 7% of total)
+ Land, water and air transport (£108 million and 7% of total)
+ Retail trade (£102 million and 6.7% of total)

Source: Regional GVA (Balanced), ONS, 2019

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The Productivity Challenge
Composition of the Economy

Sector*	Barrow GVA per FTE Employee (2018)	% share of overall GVA	Productivity gap between Barrow and England (minus London)	Change in sector GVA (last 5 years) %
Agriculture, mining, electricity, gas, water and waste	£210,732	7%	78%	57%
Manufacturing	£70,820	42%	-10%	27%
Construction	£51,494	4%	-39%	-14%
Wholesale and retail trade; repair of motor vehicles	£41,231	9%	-23%	12%
Transportation and storage	£147,606	9%	186%	9%
Accommodation and food service activities	£25,833	2%	-17%	29%
Professional, scientific and technical activities (including financial and digital)	£50,526	6%	-34%	5%
Administrative and support	£37,551	1%	-13%	-12%
Public administration, education, health	£44,632	17%	-14%	19%
Arts, entertainment and other services	£47,143	2%	-16%	3%
Overall	£60,441	100%		

* Real Estate Activities removed.

Source: Regional GVA (Balanced), ONS, 2019; BRES, ONS, 2019 Note: it is considered likely that the transportation and storage figures are skewed by activity by both BAE Systems and the offshore wind sector

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The Productivity Challenge
Employment and Business Base

Approximately 33,000 people are currently employed in Barrow, with around 1,795 business located in the borough.

Barrow accounts for 12% of all employment in Cumbria and is home to 8% of Cumbria's business base.

Barrow's economy has been growing, with 1,000 (+3%) more jobs in the area compared to 2013, and 90 (5%) more businesses since 2014.



Sector	Business Count 2019 No.	%	LQ	Change 2014-19	Employment Count 2018 No.	%	LQ	Change 2013-18
Agriculture and Mining	70	4%	0.92	17%	195	1%	0.45	-5%
Business Support Services	200	11%	**1.39**	111%	670	2%	0.25	-30%
Construction	290	16%	**1.28**	12%	1,160	4%	0.77	-17%
Creative	35	2%	0.36	-22%	135	0%	0.18	-2%
Financial and Professional Services	410	23%	**1.07**	-16%	2,185	7%	0.52	4%
Hospitality, Leisure and Recreation	200	11%	**1.47**	11%	2,435	8%	0.76	3%
ICT & Digital	45	3%	0.33	-10%	465	1%	0.40	25%
Manufacturing	105	6%	**1.17**	5%	9,805	31%	**3.98**	21%
Other Services	55	3%	0.88	10%	260	1%	0.51	4%
Public Admin, Education, Health	110	6%	**1.07**	10%	7,980	25%	**1.02**	-7%
Retail	215	12%	**1.16**	2%	4,370	14%	**1.26**	19%
Transport	15	1%	0.28	-25%	725	2%	0.77	2%
Utilities and waste	20	1%	**2.41**	33%	425	1%	**1.22**	42%
Warehousing and Logistics	5	0%	0.24	0%	200	1%	0.34	14%
Wholesale	20	1%	0.28	-20%	420	1%	0.31	6%
Total	**1,795**			**5%**	**33,000**			**3%**

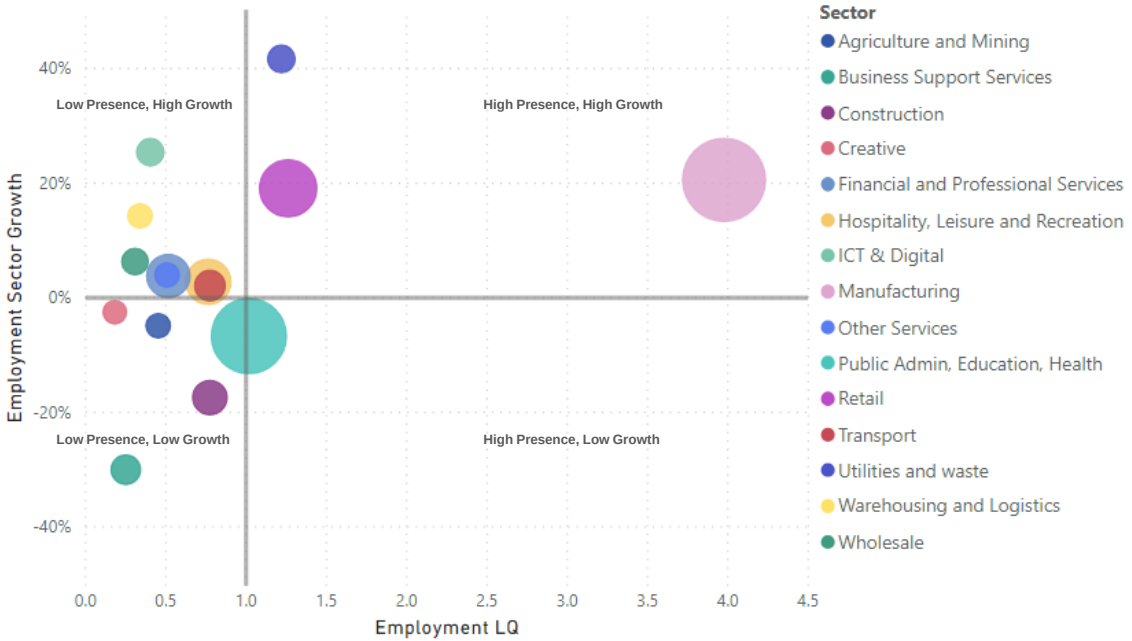
Source: UKBC, ONS, 2019; BRES, ONS, 2019

NB: Totals may not sum due to sector rounding by ONS

HATCH REGENERIS

The Productivity Challenge
Employment and Business Base

Barrow's Employment Strengths, 2013-18



The upper right quadrant of the adjacent figure illustrates that employment in Barrow exhibits specialisation in three sectors:

+ **Manufacturing** is important in both absolute and relative terms, as it employed 9,805 individuals in Barrow in 2018 and has a LQ of 3.98 (where England = 1.0). It also grew significantly (21%) between 2013-18.
+ **Retail** employed 4,370 individuals, has a LQ of 1.26 and grew by 19%.
+ **Utilities and waste** is less significant in absolute terms (employed 425 individuals), but exhibits relative importance with an LQ of 1.22. Crucially, it grew significantly by 42% between 2013-2018.

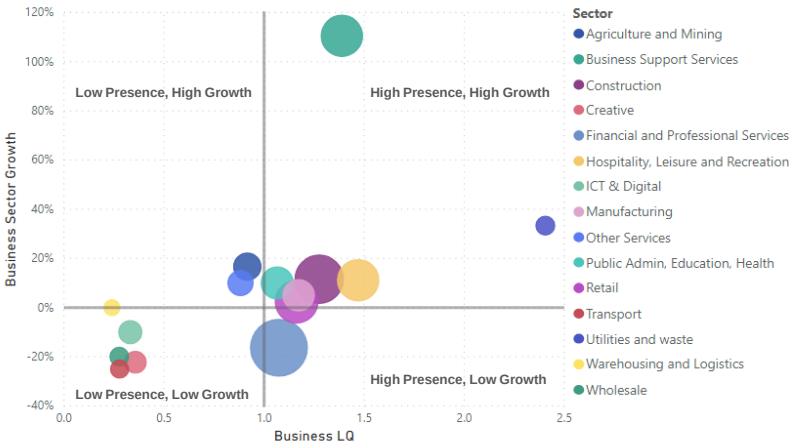
Source: BRES, ONS, 2019 Note: Figures based on Barrow LA. The Employment LQ is defined against England where England = 1.0

The Productivity Challenge
Employment and Business Base

The business base in Barrow exhibits specialisation in a number of sectors:

+ **Utilities and waste** was the sector with largest relative advantage compared to England (LQ of 2.41), albeit being small in size (20 businesses). It experienced notable growth (+33%) between 2014-19.
+ There were 200 businesses in the **hospitality, leisure and recreation** sector, an 11% growth since 2014. It has an LQ of 1.47.
+ The **business support services sector** noted significant growth (+111%), which brought the number of business in 2019 to 200. It ranked third in terms of relative importance to the Barrow economy (LQ of 1.39).
+ With 290 business, the **construction** sector is the most important in absolute terms to the Barrow economy. It grew by 12% since 2014 and had an LQ of 1.28.
+ In the **manufacturing** sector, there were 105 businesses (+5% growth). It has an LQ of 1.17. BAE and Kimberly Clark are amongst the key employers in this sector.
+ The **retail** sector had 215 businesses (+2% growth) and an LQ of 1.16.
+ The **public administration, education and health** sector had 110 businesses (+10% growth) and an LQ of 1.07. A number of Barrow's key employers, including the Furness General Hospital, can be classified in this sector.

Barrow's Business Strengths, 2014-19



Source: UKBC, ONS, 2019 Note: Figures based on Barrow LA. The Business LQ is defined against England where England = 1.0.

The Productivity Challenge
Employment Forecasts

Forecasts from 2017 to 2033 project zero net growth in FTE* jobs in Barrow during this period. This compares unfavourably with increases above 1% in South Lakeland, 2% in Carlisle, and a marginal increase in the wider county of Cumbria.

These projections do not account for the impact of the Coronavirus, which is likely to depress FTE growth in the short term (<5 years), although the longer term impact is not yet known. Nevertheless, the projections remain significant, being based on long term trends underpinned by structural factors of the economy.

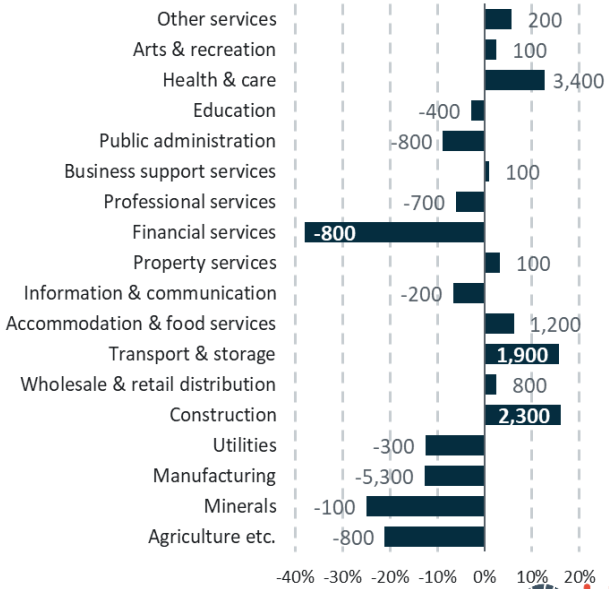
The manufacturing sector is predicted to lose 5,300 FTEs by 2033 across the Cumbrian economy. The significant presence of manufacturing in the Barrow borough indicates that Barrow is likely to be most exposed to drivers of change in the sector such as automation. Education and Public Administration will also both see decreasing FTEs in the County, this will also depress FTEs growth in Barrow where these sectors account for over 11% of total jobs.

Loses in these sectors in Barrow will be offset by growth in the Health sector, in which FTEs are forecast to grow across Cumbria by 13% to 2033. Transport & Storage and Construction are predicted to grow c.15% to 2033, which will bolster FTEs in Barrow where these sectors jointly account for 7% of jobs.

Forecast FTE Growth (2017-33) in Cumbria

Area	2017 FTEs	2033 FTEs	Change (number)	Change (%)
Allerdale	34,500	34,700	200	0.3%
Barrow	27,000	27,000	0	0.0%
Carlisle	51,500	52,300	800	2.2%
Copeland	30,300	30,100	-200	-1.4%
Eden	23,200	23,300	100	0.4%
South Lakeland	46,200	46,500	300	1.1%
Cumbria	**212,700**	**213,900**	**1,200**	**0.6%**

FTE Growth (2017-33) in Cumbria by Sector

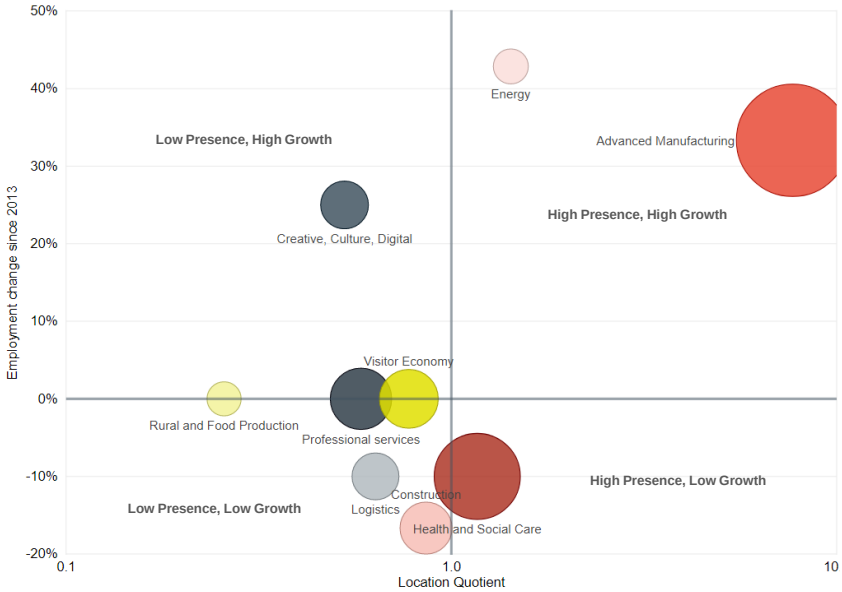


Source: Experian; *FTE refers to Full Time Equivalent measure of employment accounting for part time work

The Productivity Challenge
LIS Priority Sectors

The Cumbria LEP identifies 9 key sectors of the Cumbrian economy. These are: Advanced Manufacturing, Construction, Creative, Culture, Digital and Digital, Health and Social Care, Logistics, Professional Services, Rural and Food Production, Nuclear, and the Visitor Economy. Given Barrow's relative strengths in energy production, we have added the Energy sector to this analysis.

Local Industrial Strategy Priority Sectors – Growth and Specialisation in Barrow



The analysis of the relative importance of these key sectors in Barrow reveals:

- **Advanced manufacturing** is a significant employer in Barrow, as illustrated by absolute, relative and growing importance
- The **energy sector** is relatively small in absolute terms, but has grown rapidly (43%) and has an LQ of 1.8
- The **health and social care sector** is a significant employer of 4,500 but has experienced a decrease in employment of 10% since 2013
- The **Creative, Culture and Digital sector** is nascent, registering strong growth (+25%), but remaining a relatively modest part of Barrow's employment base
- **Professional services** is a relatively large employer (2,000 employees) but the sector is under-represented in Barrow and has not grown since 2013.
- Similarly, the **visitor economy** is an important sector in employment terms (1,750) but is under-represented and has experienced no growth in the past 5 years.

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Data source: BRES, ONS (2019)

The Productivity Challenge

Important Sectors: Advanced Manufacturing

CURRENT OVERVIEW

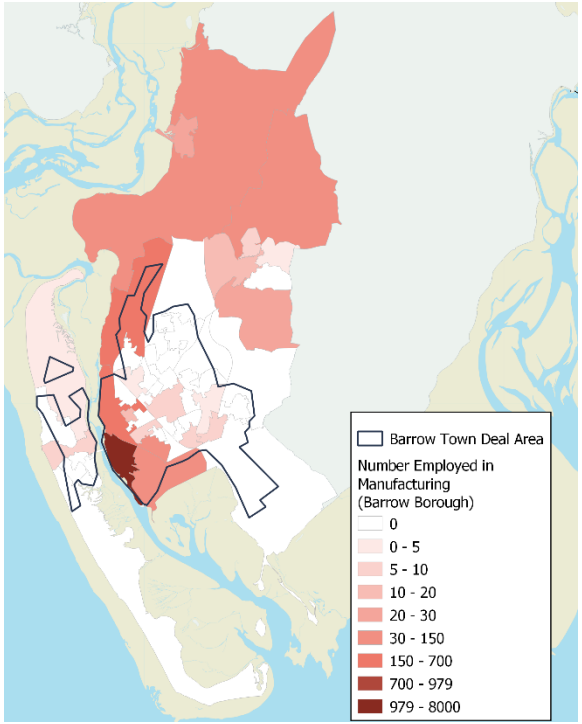
Jobs (2018)

	Advanced Manufacturing
Number	8,885
% of all jobs	28.3%
LQ vs England	8.13
% Change (2013-18)	28%

Businesses (2019)

	Advanced Manufacturing
Number	35
% of all businesses	1.9%
LQ vs England	1.26
% Change (2014-19)	16.7%

Barrow Town Deal area is home to a significant manufacturing hub. Shipbuilding employs approximately 8,000 people in a cluster anchored primarily by BAE systems immediately south of the town centre. BAE also employs around 250 in the Barrow Town Deal Area in the manufacture of weapons and ammunition.
Around this focal point are other hubs of manufacturing activity, including the manufacture of sanitary goods – anchored by the operations of producer Kimberly Clark to the north. Chemicals and manufacturing of electrical components can also be found to the north and west.



LOCAL SPECIALISMS

Advanced Manufacturing

Manufacture of other transport equipment
8,000 jobs, LQ = 62.67

Manufacture of paper and paper products
400 jobs, LQ = 6.97

Manufacture of chemical and chemical products
250 jobs, LQ = 2.37

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The Productivity Challenge
Important Sectors: Health & Social Care

CURRENT OVERVIEW

Jobs (2018)

	Health & Social Care
Number	4,500
% of all jobs	15%
LQ vs England	1.2
% Change (2013-18)	-10%

Businesses (2019)

	Health & Social Care
Number	75
% of all businesses	4%
LQ vs England	1.0
% Change (2014-19)	0%

The Health and Social care sector in Barrow is large, accounting for 15% of jobs in the Borough, at a higher density than the national average.

Activity is heavily concentrated in hospital activities, based at Furness General Hospital, part of University Hospitals of Morecambe Bay NHS Foundation Trust. The fact that most of Barrow's health employment is accounted for by the NHS explains the large discrepancy between the % of total jobs accounted for by the sector vs % of businesses.

The residential and nursing care sub sector also has a highly significant presence, employing almost three times as many people as a proportion of the local economy than the national average.

LOCAL SPECIALISMS

Health & Social Care

Residential nursing care
500 jobs, LQ = 2.8

Other human health activities
600 jobs, LQ = 1.6

Hospital activities
2,000 jobs, LQ = 1.4

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The Productivity Challenge
Important Sectors - Energy

CURRENT OVERVIEW

Jobs (2018)

	Energy
Number	250
% of all jobs	0.8%
LQ vs England	1.8
% Change (2013-18)	43%

Businesses (2019)

	Energy
Number	15
% of all businesses	0.8%
LQ vs England	4.7
% Change (2014-19)	50%

Source: UKBC, ONS, 2019; BRES, ONS, 2019

The energy sector in Barrow is small, but productive, and a key driver of economic growth. Activity is concentrated in the production and distribution of electricity. Niche strengths include:

- West Coast O&M hub for offshore wind serving five main offshore wind farms that together account for over 20% of the UK's current installed capacity
- Rampside Gas Terminal operated by Spirit Energy, linked to significant gas fields in the Irish Sea/Morecambe Bay

The sector has strong supply chain links with the manufacturing sector, including the £40bn nuclear deterrent Dreadnought programme.

LOCAL SPECIALISMS

Energy

Production of Electricity
100 jobs; LQ = 2.75

Distribution of Electricity
100 jobs; LQ = 2.03

Future opportunities include:

- Further offshore wind licensing
- Tidal generation in the Duddon Estuary and Morecambe Bay
- Biomass and micro hydro
- Carbon capture and storage solutions

HATCH REGENERIS

The Resilience Challenge
Dependence on Large Employers

Around 1,925 businesses are located in Barrow and the business base has declined by 4.2% (-85) since 2015.

A large proportion (90%) of Barrow's businesses are micro in size, employing less than 10 people, which is in line with comparator geographies. At 9.1%, there is a stronger presence of small businesses in Barrow relative to both Cumbria and England.

At the other end of the spectrum, there are 5 (0.3%) businesses employing more than 250 people. The proportion of large businesses exceeds that of Cumbria (0.2%), but it is below the national average (0.4%).

Importantly, employment is strongly reliant on a very small number of large businesses. BAE Systems and Furness General Hospital – the two largest employers – cumulatively employ directly around 10,500 people in Barrow (35% of total employment). In the case of BAE, it is estimated that there are a further 3,000 direct contractors employed in Barrow in addition*.

These businesses are strongly affected by a range of government policy decisions including those related to defence and health and social care expenditure.

Size of Businesses, 2019

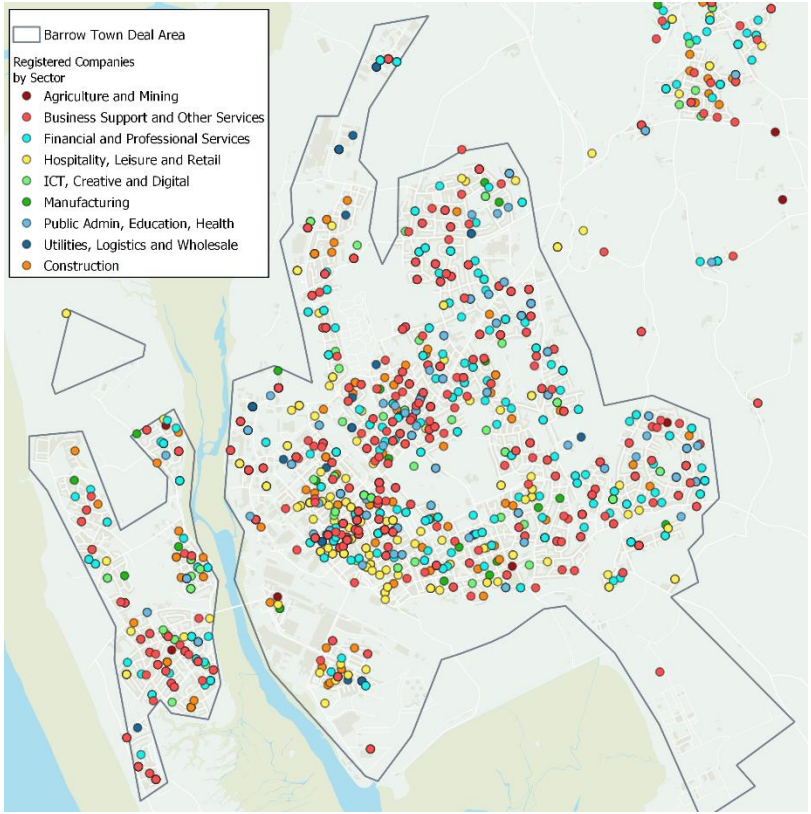
Business Size	Barrow		Cumbria	England
	No.	%	%	%
Micro (0-9)	1,725	89.6%	89.5%	89.6%
Small (10-49)	175	9.1%	8.9%	8.5%
Medium (50-249)	25	1.3%	1.4%	1.5%
Large (250+)	5	0.3%	0.2%	0.4%

Source: UKBC, ONS, 2019 based on total enterprises; *Cumbria LIS Evidence Base

HATCH REGENERIS

The Resilience Challenge
Dependence on Large Employers

The map illustrates concentrations of business activity, particularly around the town centre.



Employer	Approximate No. Direct Employees
BAE	8,250
Furness General Hospital & Morecome Bay NHS Trust	2,250
Barrow's Primary and Secondary schools	1,440
Supermarkets (Tesco; Asda; Morrisons)	800
Kimberly Clark	400
DWP, and Barrow Borough Council	400
Furness Academy	300
Furness College	200
Port of Barrow	200
Ministry of Defence	200
Risedale & St George's Nursing Homes	150

Copyright © Hatch 2018. All Rights Reserved. Data source: BRES, ONS (2019); Companies House

HATCH REGENERIS

The Resilience Challenge
Enterprise

Barrow has a relatively supressed enterprising economy, which is consistent with earlier observations on employment being heavily reliant on large employers.

In 2018, there were 35 net business births which translates into 0.9 net business births per 1,000 working age residents in Barrow. Although this is higher than Cumbria (0.1), which experienced high business death rates, it lags the national rate of 1.2. It is notable that despite a lagging birth rate, Barrow has a significantly lower death rate than England and businesses are likely to survive for longer.

Self-employment rates in Barrow are very low at 7.7% compared to 15.5% in England. Moreover, at 4.3%, self-employment in the BTD area is even lower. Homeworking is also not a significant feature, with only 6.5% of residents doing this.

In Barrow, the home working rate is 7%. These rates are significantly below those seen nationally. This is despite the fact that Cumbria as a whole outperforms the rest of England by approximately 3 percentage points in terms of both self-employment and homeworking.

Enterprise Levels

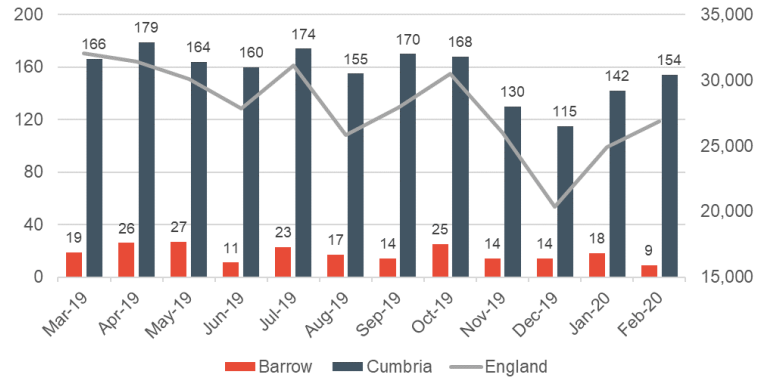
	Barrow		Cumbria	England
	No.	Rate	Rate	Rate
Births per 1,000 WAP	245	6.0	6.0	9.7
Deaths per 1,000 WAP	210	5.1	5.9	8.5
Net births	+35	0.9	0.1	1.2
Business survival rates, 2013 (3 years)	63.9%		65.8%	60.9%
Self-employment	7.7%		18%	15.5%
Home working	6.5%		13.1%	10.4%

Source: ONS Business Demography, 2018; APS, 2018; ONS Census, 2011

The Resilience Challenge
Enterprise

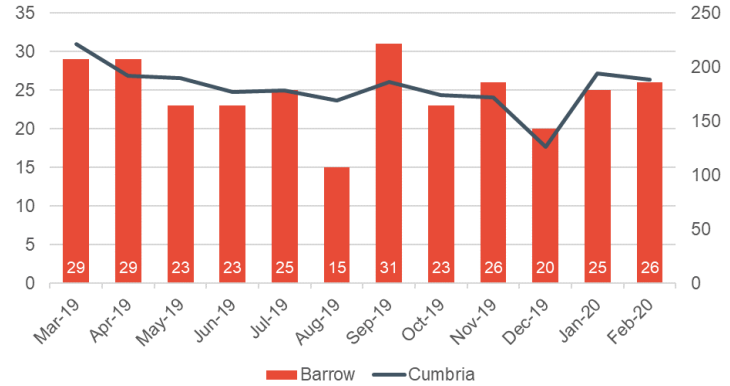
The BankSearch service collects data from a group of banks. A business previously operated through a personal account, or new to banking, that opens a first current account from a banking product range for small businesses is considered a ‘start-up’. In Barrow, 217 start-ups are recorded between March 2019 and February 2020, which accounts for about 12% of start-ups observed across Cumbria (1,877). The figure below shows that start-ups volumes vary substantially throughout the year in Barrow and Cumbria. However, in the case of the latter, a more pronounced slump is observed during the winter months. New Companies House incorporations reached 295 between March 2019 and February 2020, which represents about 14% of all incorporations in Cumbria (2,167). Relative to start-up volumes, incorporations are less volatile across both locations.

Business Start-ups, March 2019 – February 2020



Note: Data excludes businesses without banking relationships, banking with other institutions or operating through personal accounts.

Companies House Incorporations, March 2019 – February 2020



Note: These figures do not necessarily reflect newly formed businesses, as changes (eg. in business address, business name, merger) can result in a new record.

Source: BankSearch Information Consultancy Ltd via Cumbria County Council

HATCH REGENERIS

The Resilience Challenge
Innovation

A study commissioned by Innovate UK reveals that historically, the amount of IUK funding accessed by North West organisations (5.8%) is proportionally less than the region's business base (9.7%) and private sector R&D investment (11.8%). The North West could have benefited from an additional £86 million in public funding over the past ten years, if the funding secured was on par the region's business base.

With respect to Cumbria, the study notes that the LEP ranks second to last out of all LEPs in England, both in terms of the proportion of IUK funding received and the total award value per business population. Cumbria's top funded sectors include parts of the manufacturing sector, scientific research & development and office administrative, office support & other business support activities.

Consistently with the study's observations, expenditure on R&D amounted to £165 million in Cumbria in 2017, which accounts for only 5% of R&D spent across the North West. Most of that spending stemmed from the private sector (85%). The share of private sector expenditure exceeds that observed across the North West (72%) and England (70%).

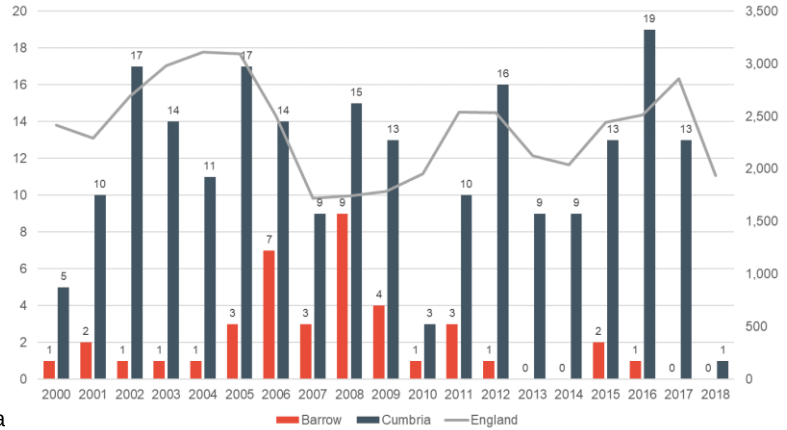
Looking at patents data, innovation activity levels in Barrow appear low. Generally, Barrow accounted for a small share of patents granted in Cumbria since 2000. However, Barrow's share peaks in 2008, which is surprising given the supressed levels of innovative activity between 2008 and 2010 across England.

Expenditure on R&D by sector of performance (£ million), 2017

	Cumbria	North West	England
Business	£141	£2,174	£21,469
Government	-	£216*	£1,994
Higher Education	£1	£691	£6,666
Private Non Profit	-	£42*	£712
Total	£165	£3,040	£30,841

* Combined figures for North West and North East due to confidentiality disclosure.

Patents granted



Source: Planning for a step change, Hatch Regeneris, 2018; Expenditure on R&D, ONS, 2019; Patent data

The Resilience Challenge
Innovation

Further insight into Cumbria LEP's performance across different types of innovative activities is provided by the Enterprise Research Centre (2019). Ten benchmarks were constructed to capture three types of innovation activities. The analysis used data from the UK Innovation Survey 2017, which captures firms' innovation activity between 2014-16.

The table illustrates that innovation activity levels in Cumbria are low across all metrics. Cumbria LEP ranks amongst the five worst performing LEPs in 4 out of 8 available benchmarks. An exception is process innovation, in which Cumbria appears to have a strong footing as it ranks 7th.

Innovation active firms in Barrow include those within the manufacturing and energy supply chains including:

- BAE Systems
- James Fisher Marine & Sub-Sea
- Siemens Subsea
- Forth Engineering

Cumbria's Innovation Activity Profile, 2014-16

	Benchmark	% of frims	Rank (out of 39 LEPs*)
Organisational and marketing innovation	Introduction of new business practices	23.1%	25
	Introduction of new methods of work organisation	13.6%	37
	Marketing innovation	13.4%	24
R&D, design investment and collaboration	% of firms undertaking R&D	16.2%	34
	% of firms undertaking design investment for innovation	n/a	n/a
	Collaboration for innovation	22.1%	38
Innovation Outcomes and sales	% of firms undertaking product or service innovation	21.3%	37
	New to the market product and service innovation	na	n/a
	Sales of innovative products and services	18.3%	39
	Process Innovation	20.5%	7

* The LEP geography preceding the recent consolidation was used to facilitate comparability with earlier studies.

Source: Benchmarking Local Innovation, ERC, 2019

HATCH REGENERIS

The Resilience Challenge
Trade

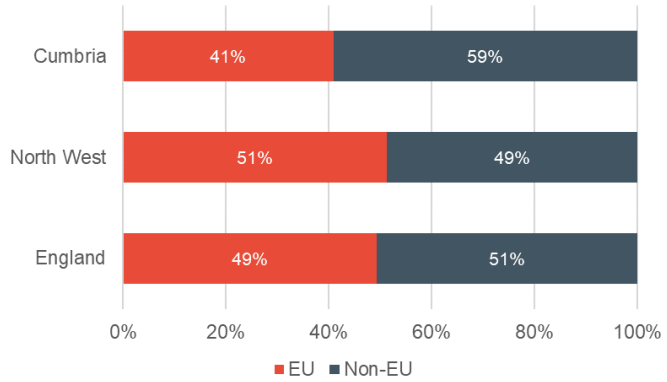
Cumbria was a net exporter in 2018, running a surplus of £396 million, which contrasts with the trade deficits noted in the North West and England. Moreover, the composition of Cumbria's exports deviates from that of comparator geographies. The region appears more reliant on non-EU export markets, which accounted for 59% of all exports in 2018, relative to 49% and 51% in the North West and England respectively. These indicators suggest that Cumbria is relatively less exposed to the longer term impacts of EU exit than other areas.

By export value, the largest exported commodity from Cumbria in 2018 was machinery and transport (£640 million) – predominantly to non EU countries, followed by manufactured goods. BAE Systems are a major contributor to export activity in this commodity group. Shipbuilding and associated supply chains are relatively insulated against the direct effects of Brexit.

Trade (£ million), 2018

	Exports	Imports	Net Exports	
				% Change since 2016
Cumbria	£1,821	£1,425	£396	-12%
North West	£27,862	£38,809	- £10,947	67%
England	£249,011	£384,383	- £135,372	9.7%

Exports to EU and Non-EU markets, 2018



Source: Regional Trade in Goods Statistics disaggregated by smaller geographical areas, 2019

The Resilience Challenge
Trade

Good Exports by Commodity type (£ million) in Cumbria, 2018

Description	Total Exports	Exports to Non-EU Countries	Exports to EU Countries
Machinery & transport equipment	£640	£526	£114
Manufactured goods classified chiefly by material	£472	£185	£287
Chemicals & related products	£315	£155	£160
Miscellaneous manufactured articles	£244	£169	£75
Food & live animals	£131	£38	£93
Crude materials, inedible, except fuels	£7	£1	£6
Animal & vegetable oils, fats & waxes	£6	-	£6
Beverages & tobacco	£3	£1	£2
Commodities/transactions not classified elsewhere	£1	-	£1

Source: Regional Trade in Goods Statistics disaggregated by smaller geographical areas, 2019

HATCH REGENERIS

The Resilience Challenge
Energy Transition

Clean growth is one of the Grand Challenges recognised in the national Industrial Strategy where Barrow has a key role to play both in terms of playing its part in the decarbonisation agenda, and maximising the transition to clean energy.

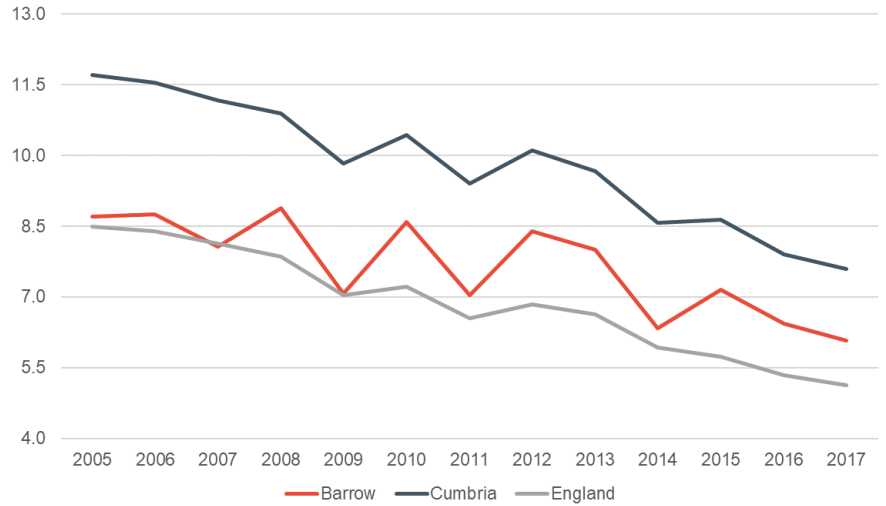
It is estimated that in 2017 CO_2 emissions in Barrow stood at 408 kt. Per capita CO_2 emissions in Barrow stood at 6.1 tons in 2017, which is lower than Cumbria (7.6) but higher than England (5.1).

Total CO_2 emissions have declined over time with a 29% decline experienced since 2012, exceeding that seen in both Cumbria (25%) and England (22%). Interestingly, the per capita CO_2 emissions gap between Barrow and England has widened from 0.2 tons in 2005 to 1 ton in 2017.

CO_2 Emission Estimates (kt), 2017

	Total	% Change (2012-17)
Barrow	408	-29%
Cumbria	3,788	-25%
England	284,921	-22.2%

Per capita CO_2 Emissions (t)



Source: UK local authority and regional CO_2 national statistics: 2005-17, BEIS, 2019

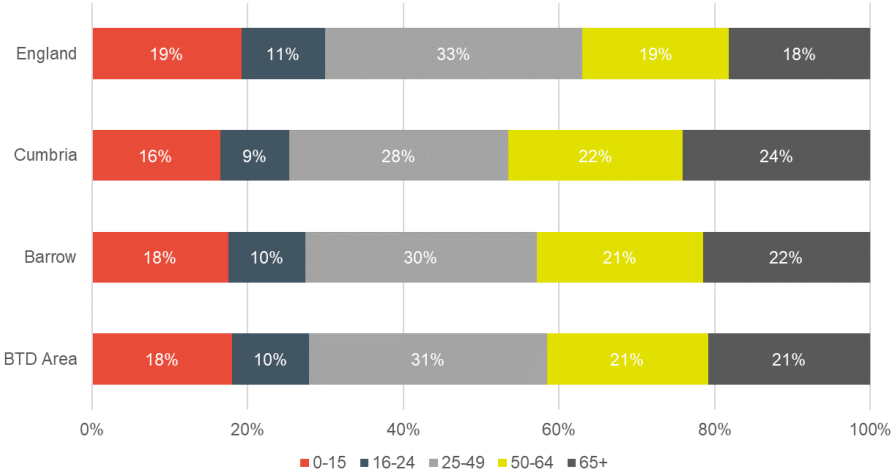
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The Labour Market Challenge
Demographics & Migration

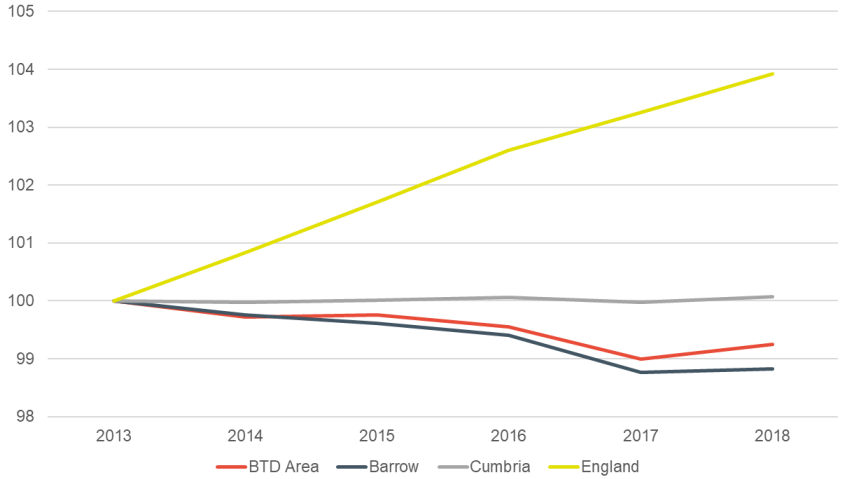
Barrow is home to 67,137 people, of which 51,609 (77%) reside in the Town Deal area. Since 2013, population has decreased at a slightly lower rate in the Town Deal area (0.8%), compared to the rest of Barrow (1.2%). Over the same period, Cumbria's population has remained broadly constant, whilst in England it increased by approximately 4%.

The population profile of the Town Deal area is broadly in line with the rest of Barrow. Working age residents represent 62% of the area's population, which is higher than Cumbria (59%), but lower than England (63%). In line with this, 65+ population (21%) is lower than that of Cumbria (24%), but higher than the rest of England (18%).

Population Age Structure, 2018



Population Growth (2013 = 100)



Source: Population Estimates, ONS, 2019

The Labour Market Challenge
Demographics & Migration

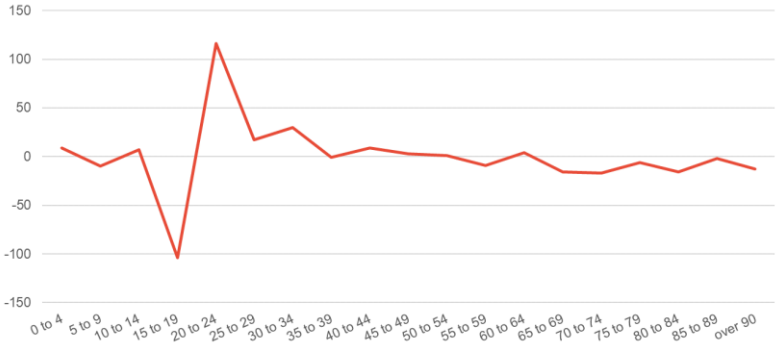
Migration flows are not a strong driver of population growth in Barrow. In 2018, the net inflow of internal migration was negligible, due to a dip in the migrant outflow which may reflect increased economic opportunity within the town. Prior to 2018 there was a noticeable net outflow, despite a steady increase in internal migration in-flows since 2012. International migration has led to a small net inflow of residents (+64) since 2017.

The age breakdown of net internal migration in 2018 indicates a loss of young people aged 15-19 which may indicate a lack of higher education opportunities within the town. In contrast, Barrow has been successful at attracting young working age residents (25-34). There is a modest net outflow of those aged 65+ which points to retirees moving outside the town.

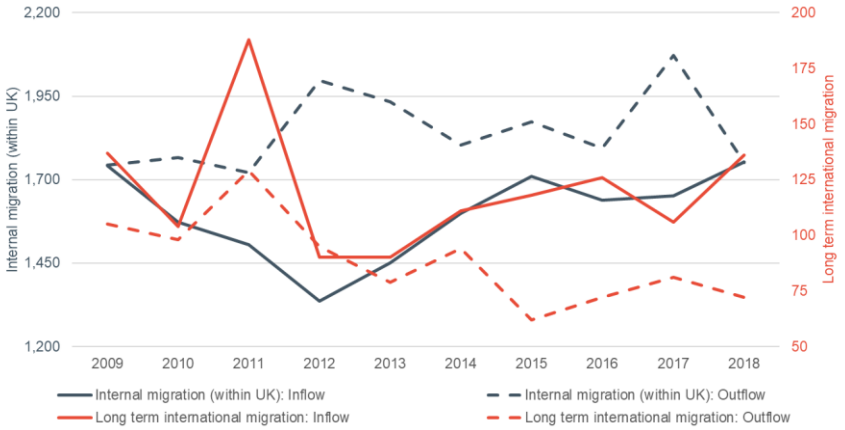
Internal & Long-term International Migration to/from Barrow, 2017-8

	Inflow	Outflow	Net Inflow
Internal Migration	1,753	1,751	2
Long-term International Migration	136	72	64

Internal & Long-term International Migration to/from Barrow



Net Internal Migration by Age, 2018



Source: ONS Internal Migration: Detailed Estimates, 2019; ONS Local Area Migration Indicators, 2009-2018

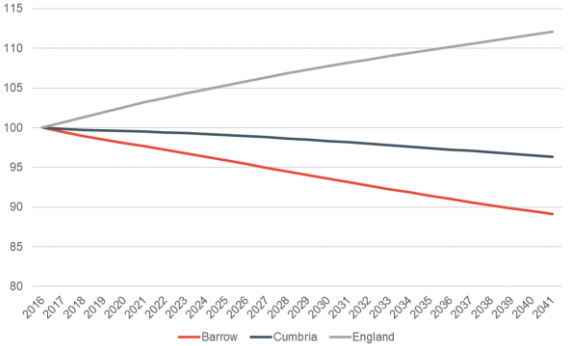
The Labour Market Challenge
Demographics & Migration

Barrow's population is **projected to fall** from 67,532 in 2016 to 60,186 in 2041, an 11% decline, which significantly exceeds the one expected across Cumbria (-4%) and contrasts with population growth across England (12%).

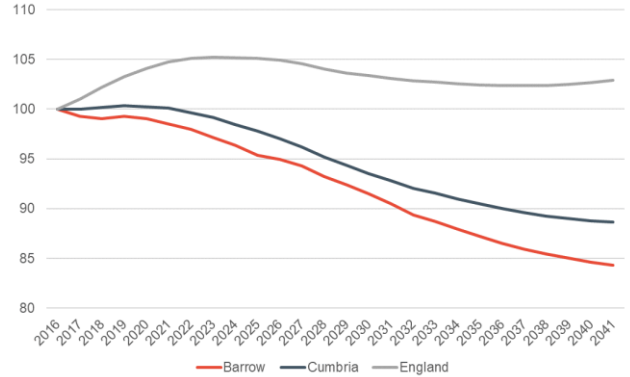
In absolute terms, it is forecast that there will be a -1,900 (-16%) decline in residents aged 0-15 and -8,350 (-20%) fall in the size of the working age population drives Barrow's declining population.

Whilst the population is ageing across all comparator areas, Barrow expects more modest increases in the over 65 age group of +2,900 residents (+20%), relative to Cumbria (+33%) and England (+52%).

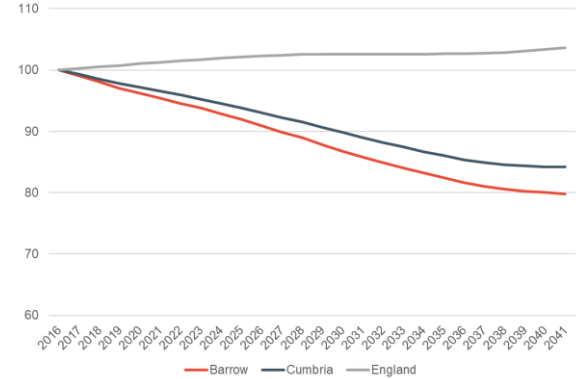
Population Growth Projections (2016 = 100)



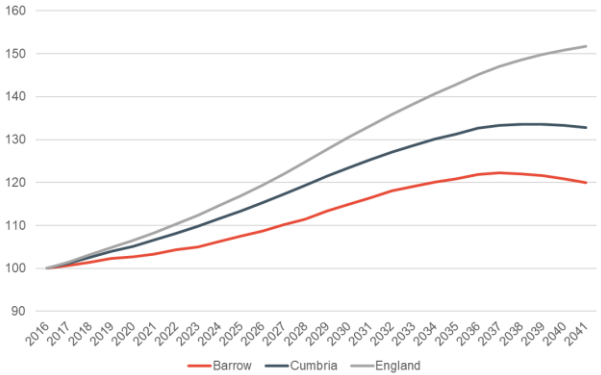
Population Growth Projections Aged 0-15 (2016 = 100)



Population Growth Projections Aged 16-64 (2016 = 100)



Population Growth Projections Aged 65+ (2016 = 100)



Source: Population Projections, ONS, 2019

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The Labour Market Challenge
Economic Activity

Of Barrow's 28,400 economically active residents, 21,000 (74%) are located in the Town Deal area. Labour market participation in the Town Deal area is significantly lower than comparator geographies, despite the presence of strong economic opportunities.

- Economic activity and employment rates are c.13 percentage points low than the national average in Barrow

- Unemployment rates are above average, at 6.2% compared to 4% in England. Moreover, The DWP 'Alternative Claimant Count' identifies 1,276 claimants in Barrow in November 2019, taking into account change to unemployment benefit and the roll-out of Universal Credit. With a youth claimant rate of 5.5% in 2018 relative to 3.5% in Cumbria, youth unemployment is a concern in Barrow*.
- The proportion of 18-24 year olds in full time education in Barrow is half that of the national figure, illustrative of below average participation in higher education.
- The number of jobs in Barrow per resident aged 16-64 is 0.8, which is lower than both Cumbria's (0.93) and England's (0.87) job density. Thus, whilst there is a healthy level of labour demand in Barrow, there is still scope for improvement.

Labour market participation, 2019

	BTD Area		Barrow		Cumbria	England
	No.	%	No.	%	%	%
Economic Activity Rate (16-64)	21,000	66.2%	28,400	71.4%	81.2%	79.1%
Employment Rate (16-64)	19,700	62%	27,100	68.1%	79.4%	75.9%
Unemployment Rate	1,300	6.2%	1,300	4.6%	2.2%	4%
18-24 Year Olds in Full Time Education	1,300	18.6%	1,300	16.2%	24.1%	32.6%
Job Density	-	-	33,000	0.8	0.93	0.87

* Total jobs includes employees, self-employed, government supported trainees and HM Forces

Source: Annual Population Survey, 2019; ONS Job Density, 2018; DWP Alternative Claimant Count (November 2019); *People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

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The Labour Market Challenge
Economic Inactivity

The are 10,800 economically inactive residents of working age in the BTD area, which represents 95% of all economically inactive individuals in Barrow. The proportion of economically inactive individuals who want a job is lower in the BTD area (14%), compared to the rest of Barrow (16%), Cumbria (18%) and England (21%).

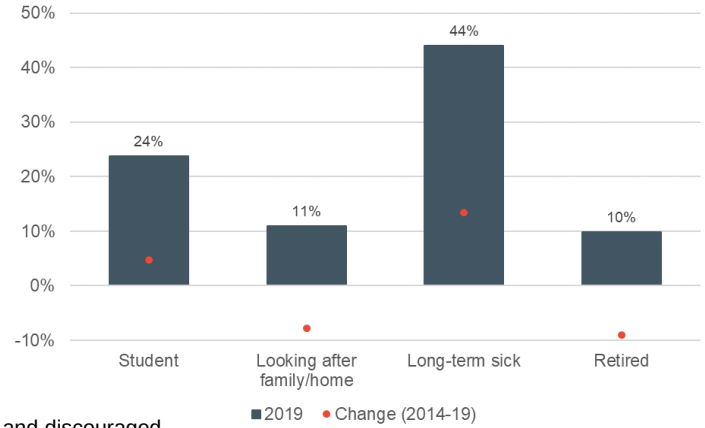
At 44%, long term sickness is disproportionally important in driving the BTD area's high economic inactivity. Notably, the proportion of economically inactive long-term sick grew by a substantial 14% since 2014. This is consistent with the People, Employment & Skills strategy group's observation of a particularly high rate of Incapacity Benefit Claimants in Barrow (8.9% of the working age population in November 2018) relative to the rest of Cumbria (5.8%).

The second most important reason for economic inactivity is studying (22%), which grew conservatively in comparison (5%). The importance of looking after family & home and retirement as drivers of economic inactivity diminished relative to 2014 with a decline of 8% and 9% respectively.

Economic Inactivity by reason, 2014-19

	BTD Area		Barrow		Cumbria	England
	No.	%	No.	%	%	%
Economic Inactivity Rate (16-64)	10,800	33.8%	11,400	28.6%	18.8%	20.9%
% of economically inactive who want a job	1,500	14%	1,800	15.9%	17.5%	20.9%

Economic Inactivity, 2019



Source: Annual Population Survey, 2019; People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

Note: No data is available for temporary sick and discouraged.

The Labour Market Challenge
Precarious Employment

Part time work accounts for 28% and 29% of employment in the BTD area and Barrow respectively, which is in line with Cumbria (29%), but lower than England (32%).

In the BTD area, part time work is a prominent feature in hospitality, leisure and recreation (60%), retail (60%) and public administration, education and health (44%). The prevalence of part time work in these is broadly in line with the rest of Barrow, but higher than comparator geographies.

Overall, about 4.1% of Barrow's workers are employed in non-permanent positions, which is slightly lower compared to Cumbria and England (4.6%).

Proportion of Workers in Non-Permanent Employment, 2018*

	Barrow		Cumbria	England
	No	%	%	%
Non-Permanent Work	1,200	4.1%	4.6%	4.6%

Proportion of Workers in Part-time Employment, 2018*

Sector	BTD Area		Barrow		Cumbria	England
	No.	%	No.	%	%	%
Agriculture and Mining	0	0%	10	15%	25%	19%
Business Support Services	145	26%	185	28%	35%	37%
Construction	135	14%	170	15%	16%	16%
Creative	30	26%	35	28%	22%	21%
Financial and Professional Services	470	27%	590	28%	29%	20%
Hospitality, Leisure and Recreation	1,175	**60%**	1,430	**60%**	**55%**	**56%**
ICT & Digital	75	17%	80	17%	19%	14%
Manufacturing	225	2%	265	3%	6%	8%
Other Services	80	43%	95	40%	31%	32%
Public Admin, Education, Health	3,125	**44%**	3,535	**45%**	**44%**	**41%**
Retail	2,230	**60%**	2,390	**59%**	**52%**	**51%**
Transport	90	13%	100	14%	15%	16%
Utilities and waste	10	2%	15	4%	4%	8%
Warehousing and Logistics	55	37%	55	24%	24%	16%
Wholesale	60	17%	70	19%	17%	15%
Total	**7,905**	28%	**9,025**	29%	34%	32%

Source: BRES, ONS, 2019; Annual Population Survey, ONS, 2019 * No 2019 figures for BTD area is available.

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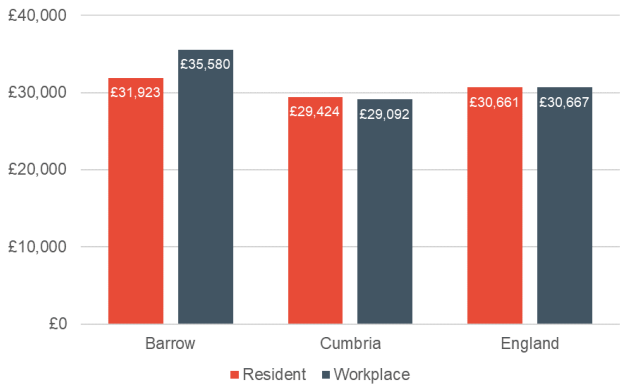
The Labour Market Challenge
Earnings

Median gross salaries in Barrow for full time resident workers stood at £31,923 in 2019, which exceeds Cumbria's and England's levels by 8% and 4% respectively. At £35,580, earnings for Barrow's workers are above those of residents, suggesting the borough attracts employment in higher paying occupations. Barrow's relatively higher median earnings are linked to the shipyard (CLEP, 2019).

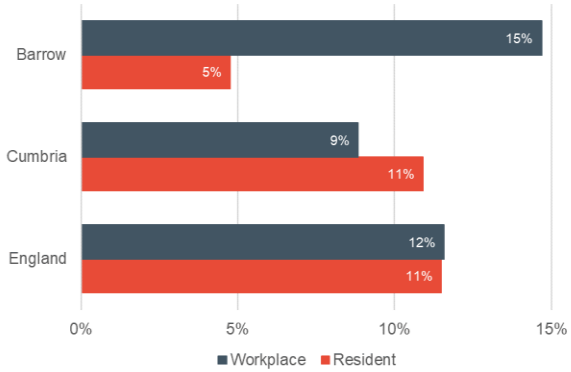
Workplace earnings grew significantly more than resident earnings in Barrow since 2014 and outstripped the growth of comparator geographies.

The gender pay gap is significantly more prominent in Barrow (35%), relative to Cumbria (25%) and England (18%). This provides a measure across all jobs, and is calculated as the difference between average hourly earnings of men and women. This is likely to reflect the over-representation of males in traditional manufacturing industries in Barrow.

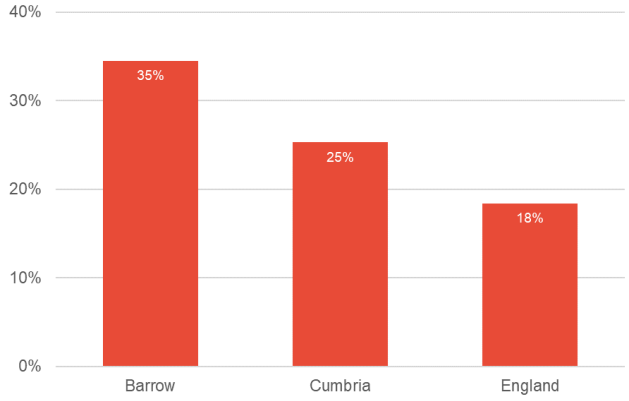
Median Annual Gross Pay, 2019



Growth of Median Annual Gross Pay, 2014-19



Gender Pay Gap, 2019



Source: ASHE, ONS, 2019; People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

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The Labour Market Challenge
Travel to work patterns

There is a net inflow of people travelling into Barrow to access employment of c.400. Self containment (ie those residents who live and work in Barrow) is relatively high at 83%. The People, Employment and Skills Strategy Group (2019) identifies strong links between South Lakeland, in particular Ulverston, and Barrow. The data on commuter flows presented below confirms the strong links between Barrow and South Lakeland (3,324 in-commuters and 2,695 out-commuters). Strong commuters flows between Barrow and Copeland are also noted (526 in-commuters and 705 out-commuters).

Top home locations for Barrow's workers, 2011

Location	No. of In-Commuters
South Lakeland	3,324
Copeland	526
Allerdale	278
Carlisle	218
Lancaster	198
Eden	65
Liverpool	19
Preston	18
Sefton	17
Wyre	15
Manchester	15
Craven	15

Top home locations for Barrow's workers, 2011

Location	No. of Out-Commuters
South Lakeland	2,695
Copeland	705
Carlisle	260
Lancaster	177
Allerdale	170
Eden	130
Manchester	45
Richmondshire	22
Westminster,City of London	19
Argyll and Bute	19
Preston	17
Salford	16

Commuting Patterns, 2011

	Barrow
Total living in Barrow (in employment)	27,379
Total working in Barrow	27,776
Commuting Patterns	
Out-Commute	4,789
In-Commute	5,186
Barrow's Workers & Residents	
Live and work in Barrow	22,590
Home workers	2,029
No fixed place of work	1,673

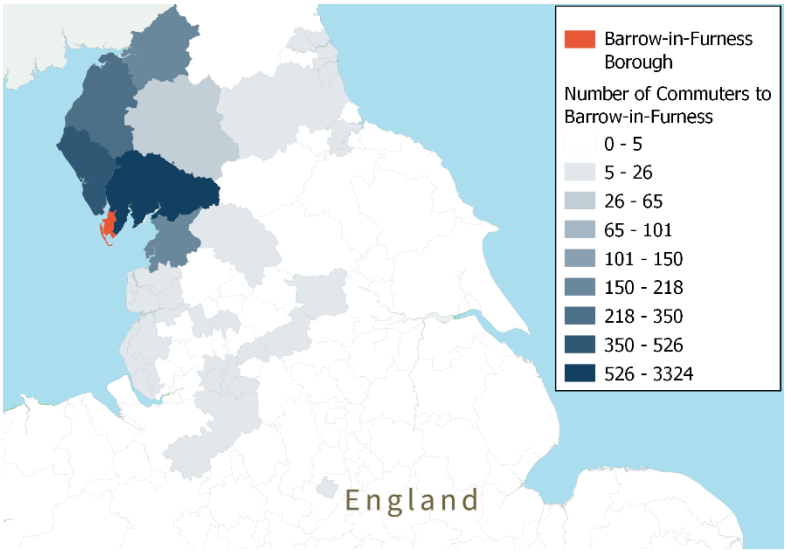
Source: Census, ONS, 2011; People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

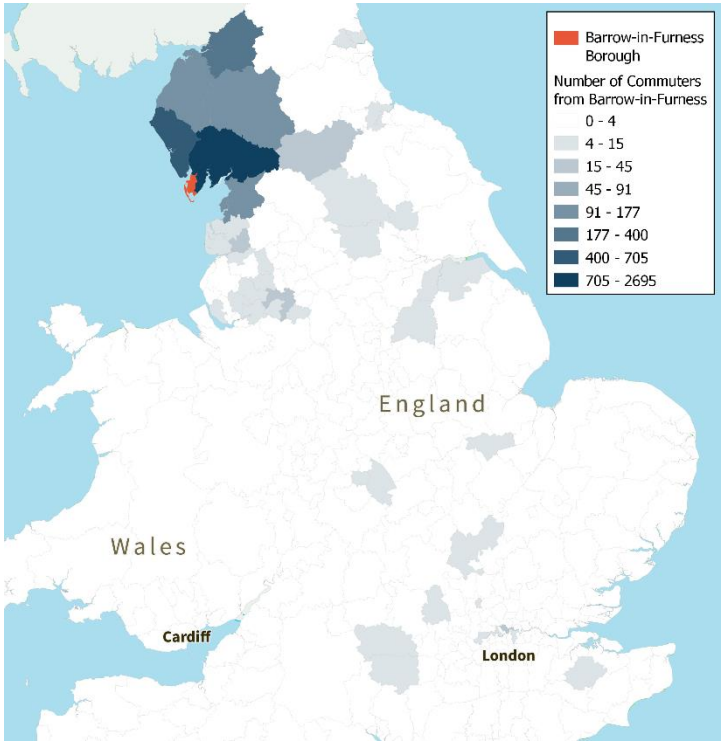
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The Labour Market Challenge
Travel to work patterns

Outside of Cumbria, people commute to Barrow from Lancaster (+200), Liverpool (+20) and Preston (+20).

Residents of Barrow are most likely to commute out of the area to access employment in Lancaster (+180), Manchester (+45) and Richmondshire (+20).





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The Labour Market Challenge
Skills

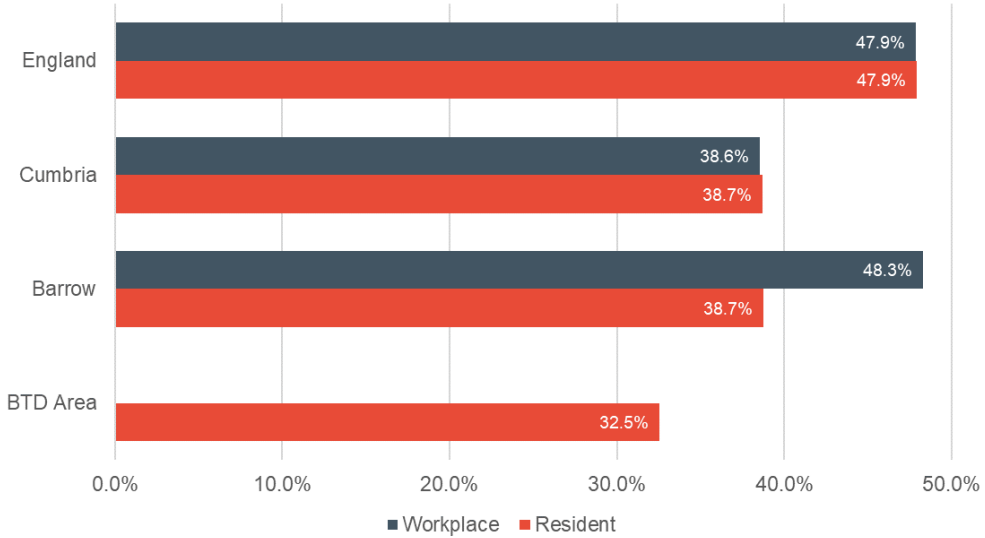
Approximately 33% of the BTD area's residents are employed in higher level occupations, which is below the rates noted for Barrow as a whole and Cumbria (39%) and substantially below those of England (48%). There has been a decline of 17% in the proportion of residents occupied in higher level professions in the BTD area since 2014, which contrast with the 15% growth observed across the Barrow borough. This suggests that residents of the BTD area have not been able to access the higher level employment opportunities presented by economic growth in the borough.

Notably, 48% of Barrow's workforce are engaged in higher level occupations, a growth of 32% since 2014. Thus, the gap between resident and workplace population employed in higher level occupations widened significantly from 2 percentage points in 2014 to 10 percentage points in 2019.

Looking ahead, occupational growth is forecast across all levels in Cumbria, with the exception of elementary trade, plant & machine operative occupations which are expected to contract*. These occupations are held by approximately 25% of the BTD resident population currently, and illustrate the potential threat this cohort faces to drivers such as automation and digitalisation.

The following page illustrates changes to the occupational structure in Barrow.

Share of higher level occupations in the workforce, 2019



Source: Annual Population Survey, ONS 2019 *CLEP, LIS Evidence Base

The Labour Market Challenge
Skills

Occupations of Barrow's Residents & Workers, 2014-19

Occupation	BTD Area Residents		Barrow's Residents		Barrow's Workers	
	No. (2019)	Change (2014-19)	No. (2019)	Change (2014-19)	No. (2019)	Change (2014-19)
Managers, directors and senior officials	1,200	33%	1,800	6%	1,300	-7%
Professional occupations	3,700	-12%	5,800	29%	7,900	46%
Associate prof & tech occupations	1,900	-39%	3,400	0%	3,700	23%
Higher level occupations	*6,800*	*-17%*	*11,000*	*15%*	*12, 900*	*32%*
Administrative and secretarial occupations	1,000	-63%	1,700	-48%	1,300	-52%
Skilled trades occupations	4,400	29%	5,100	21%	3,100	-39%
Caring, leisure and other service occupations	2,500	-19%	3,200	-24%	2,600	-30%
Sales and customer service occupations*	900	-47%	1,100	-35%	1,500	-25%
Process, plant and machine operatives**	1,400	-44%	2,400	-4%	2,300	5%
Elementary occupations	3,900	-13%	3,900	-19%	3,000	-23%
Total	**20,900**		**28,400**		**26,700**	

* Data for April 2018 – March 2019 is used, as latest available data is suppressed due to small sample size.

** Data for July 2018 – June 2019 is used, as latest available data is suppressed due to small sample size.

Source: Annual Population Survey, ONS 2019

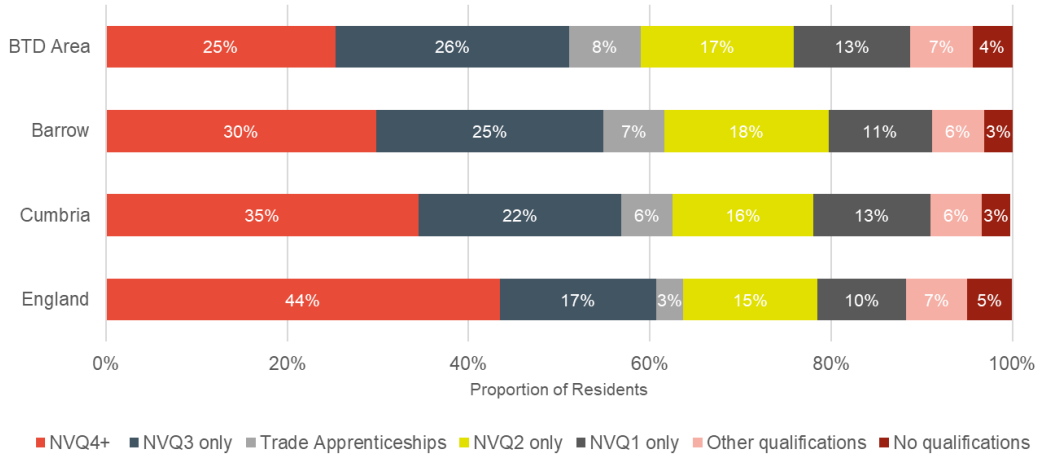
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The Labour Market Challenge
Skills

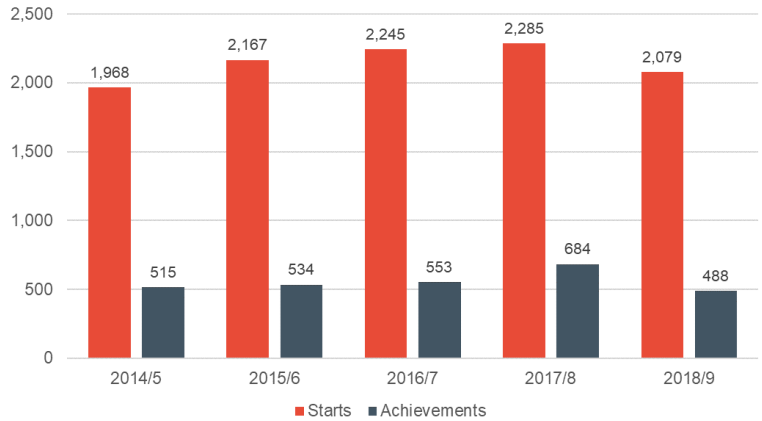
Barrow has a strong intermediate skills base, but only 30% of the population hold degree level qualifications (compared to 44% in England). In the BTD area, the share of residents with degree level qualifications is even lower at 25%. The demand for higher level skills is growing, driven by skill-biased technical change, and Barrow needs to be responsive to these trends to facilitate a competitive and productive economy. An estimated 34% of the replacement demand for jobs in Cumbria between 2019 and 2024 are expected to require L4+ qualifications*.

Demand from the manufacturing sector drives apprenticeship starts, especially amongst the 16 to 18 year group*. There is an increasing trend in apprenticeship starts and achievements until 2017/8, when the Apprenticeship Levy was introduced. Of the 2018/9 achievements, 25% were intermediate, 68% were advanced and 7% were higher apprenticeships.

Qualifications Profile, 2018



Apprenticeship Starts & Achievements in Barrow



Source: Annual Population Survey, ONS 2019; Apprenticeship Starts, DoE, 2019; Apprenticeship Achievements, DoE, 2019; People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

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The Labour Market Challenge
Skills

Skill gaps are pronounced in Cumbria, with 17% of employers reporting skill gaps (compared to 13% in England). Skill shortages are a significant feature, with 31% of all vacancies defined as skill-shortage vacancies (compared to 22% in England).

Consultation with major employers in the town, including BAE Systems, highlight the scale of the skills shortage challenge they face and the difficulties experienced in attracting talent to the area.

Summary of skills deficiency, 2017

	Cumbria LEP	North West	England
No. of skills gaps*	15,100	154,800	1,060,000
No. of not fully proficient staff (as a % of employment)	6%	5%	4%
% of establishments with any not fully proficient staff	17%	15%	13%

Skill Shortages, 2017

	Cumbria LEP	North West	England
Number of vacancies*	7,300	100,900	872,500
% of all vacancies that are skill-shortage vacancies	31%	22%	22%
Establishments with any vacancies	20%	20%	20%
Establishments with at least one hard-to-fill vacancy	11%	8%	8%
Establishments with a skills shortage vacancy	8%	6%	6%

Skill Gaps, 2017

	Cumbria LEP	North West	England
% of establishments with:			
Any skills gap	17%	15%	13%
A skill-shortage vacancy	8%	6%	6%
Either a skill gap of skill-shortage vacancy	20%	19%	17%
Both skills gap and skill-shortage vacancy	4%	2%	2%

Source: Employer Skills Survey, DoE, 2018

* Figures rounded to the nearest 100.

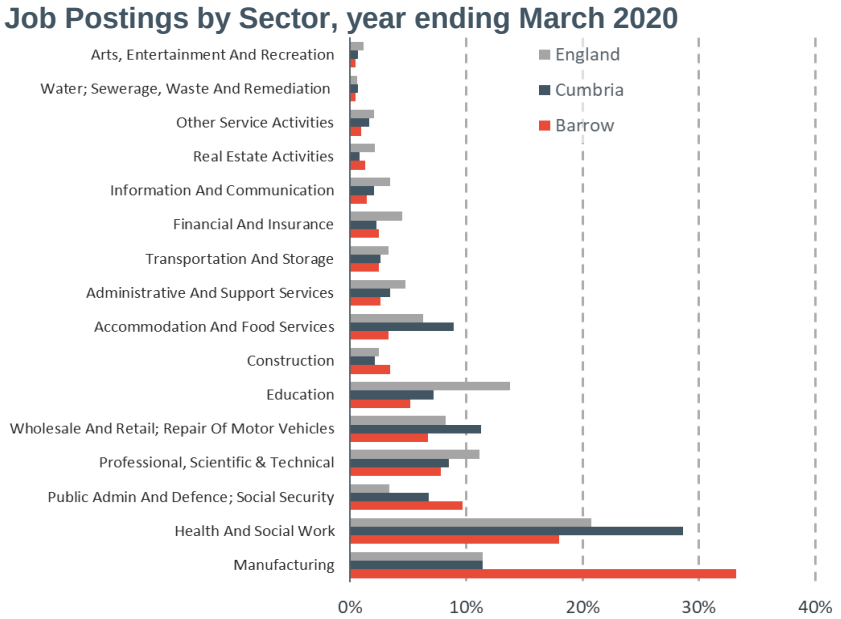
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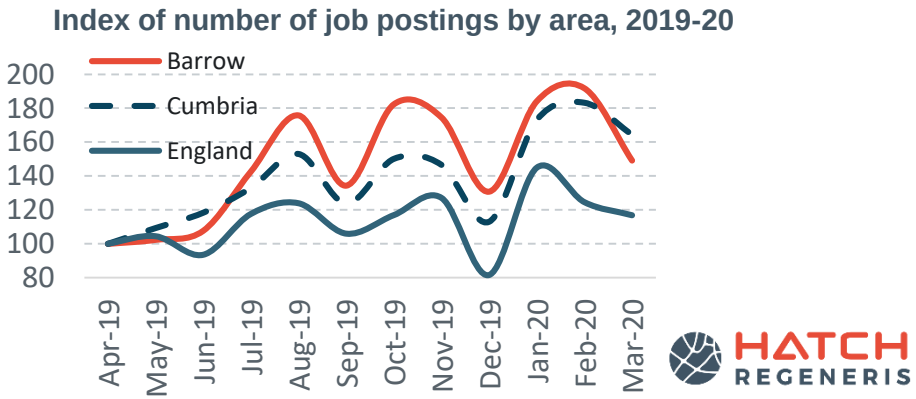
The Labour Market Challenge
Skills

Barrow saw a total of 3,000 jobs posted during the year ending March 2020, which strong growth relative to each previous month compared to Cumbria and England.

The huge importance of manufacturing to Barrow's labour market and wider economy is demonstrated in job postings. 1/3 of job postings in the last year are accounted for by the sector in Barrow – this is approximately three times the proportion across Cumbria and England. This is reflected by the fact that BAE Systems, an advanced manufacturer, was the organisation responsible for the majority of job postings in Barrow for the year ending March 2020. BAE registered almost 300 job postings during the year, which was over twice as many as the NHS – the second organisation by number of job postings. Furthermore, Public Administration and Defence and Compulsory Social Security is also an important sector for job postings in Barrow, and indeed this sector includes Ministry of Defence related activity linked to BAE Systems in Barrow.

Health and Social Work was the next largest sector in terms of job postings in the past year, accounting for 18% of postings in Barrow, which is a smaller proportion than the Health Sector at the England and Cumbria level. As mentioned, the NHS posted more jobs than any other organisation in Barrow barring BAE Systems, with well over three times as many postings as the third placed organisation. This confirms the importance of Health as a key sector in Barrow.





Data Source: Labour Insight via Cumbria County Council

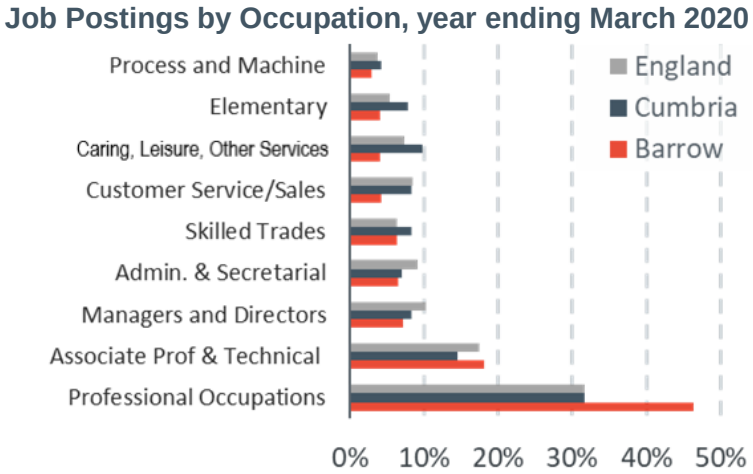
The Labour Market Challenge
Skills

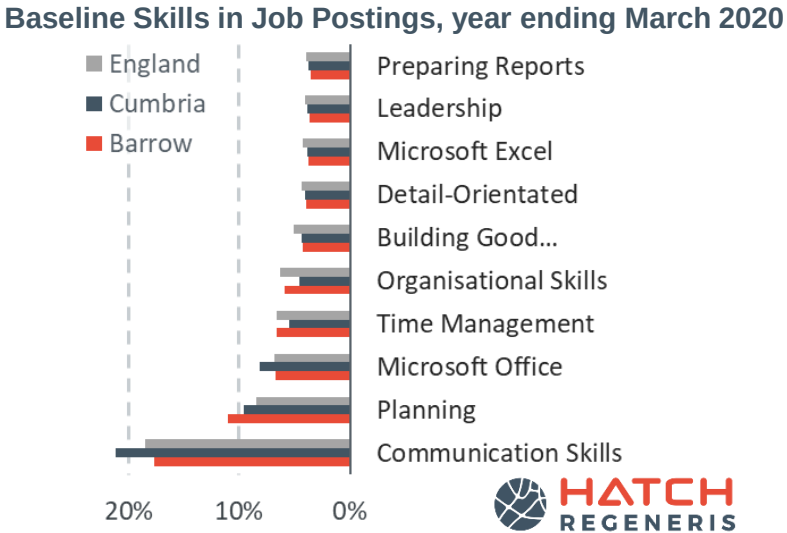
Almost half (46%) of Barrow's 3,000 job postings in the last year were for Professional Occupations, a significantly higher than both Cumbria and England, demonstrating strong demand in the Borough for higher level occupations. This is compounded also by strong demand for Associate Professional and Technical Occupations, which are the next most posted occupation in Barrow at 18% - slightly more than England.

For all other occupation types, Barrow saw a smaller proportion of job postings than both England and Cumbria. This further underlines the strong demand in Barrow for higher level occupations. Barrow saw especially few postings in Caring, Leisure and Other Services, as well as Customer Service and Sales, with the proportion of job postings accounted for by these occupations in Barrow at approximately half of the proportion in Cumbria in the past year.

Baseline skills referenced in job postings were broadly similar in Barrow to those in Cumbria and England, with Communication Skills being paramount in all regions – although only 18% of postings made reference to Communication Skills in Barrow, compared to 21% in Cumbria.

Despite the especially high demand in Barrow for Professional Occupations, which includes scientific and technical occupations, virtually all of the skills demanded by employers through their job postings were general and transferrable skills.





Data Source: Labour Insight via Cumbria County Council

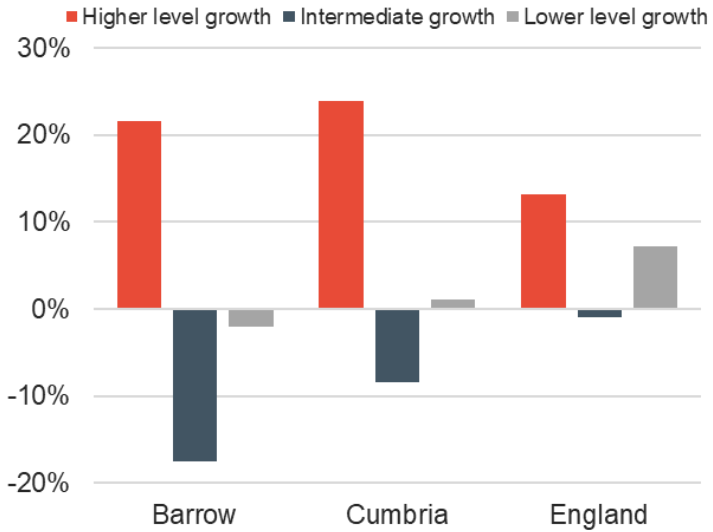
The Labour Market Challenge

Skills

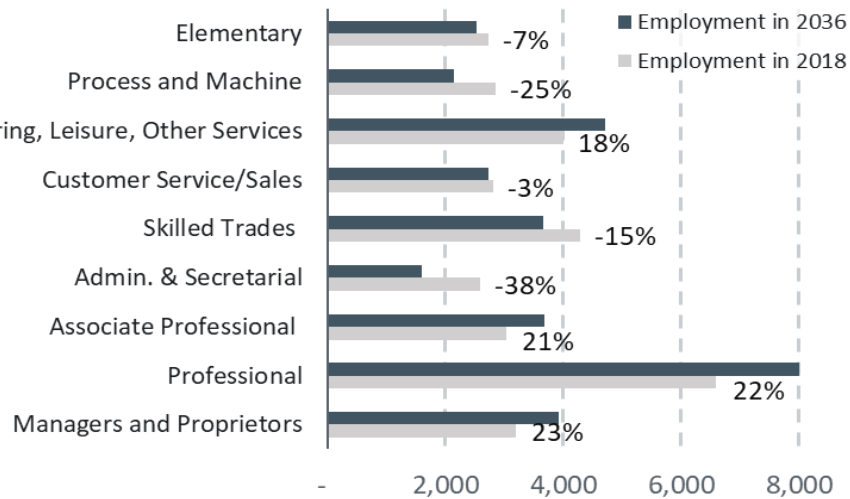
Labour market projections show that the occupational structure of Barrow's employed workforce will shift substantially in the years to 2036. Whilst this broadly applies to Cumbria too, Barrow will see a greater shift than the wider county especially at the intermediary level of occupation – and both areas will see greater change than England.

The proportion of higher level occupations, defined as Managers & Directors, Professionals and Associate Professional Occupations, will increase by 22% in Barrow during this period. This is slightly below the projected 24% growth in Cumbria, but much greater than England's projected 13% - suggesting great demand for higher level skills in Barrow going forward. This growth in Barrow will coincide with a marginal decrease in the proportion of lower level occupations (-2%), and a substantial decrease in intermediary occupations (-18%). Whilst intermediary occupations will shrink as a proportion in Cumbria and England, the decrease will be much smaller.

Change in occupation share (2018-36) by level of occupation



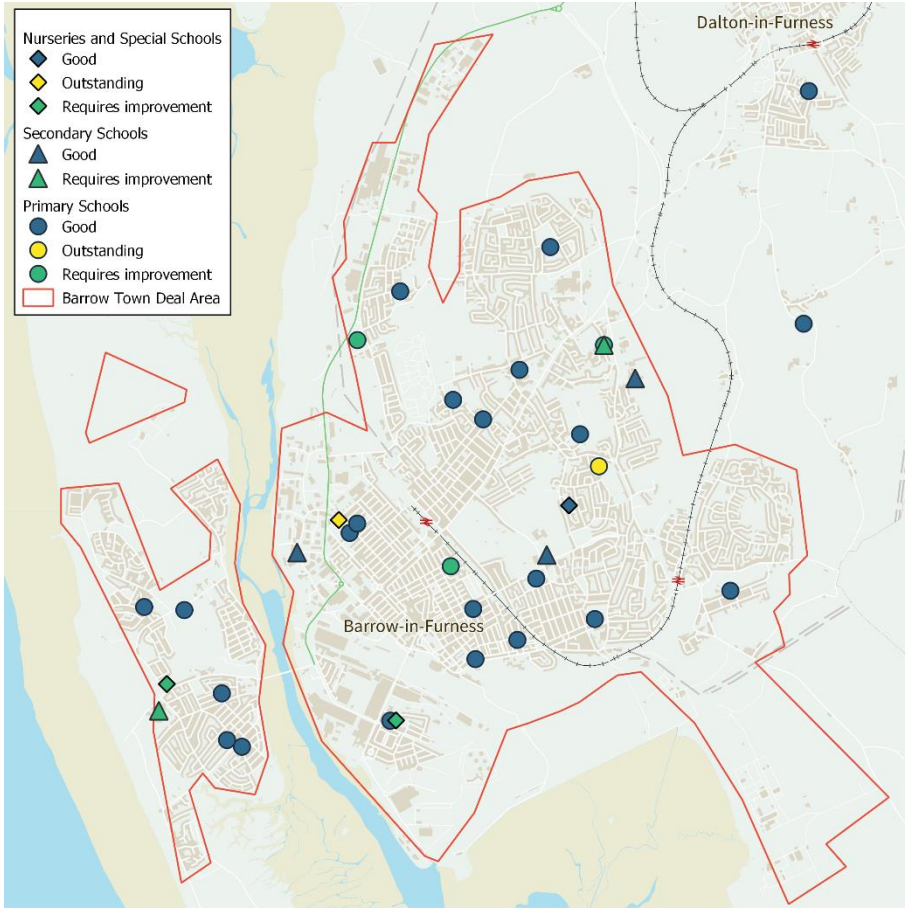
Change in employment by occupation (2018-36), Barrow



Data Source: Cambridge Econometrics Local Economy Forecasting Model (June 2019) via Cumbria County Council

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The Education Challenge
Performance



According to Ofsted, performance of educational establishments in Barrow is mixed, including:

- Nurseries and special schools in Barrow are especially mixed in terms of performance, with one outstanding (Hindpool), one good, and two requiring improvement.
- Primary schools are generally good, with only three out of 26 schools requiring improvement. One primary school was rated as outstanding (Newbarns), with the rest rated as good.
- Secondary schools in Barrow show a mixed pattern of performance, with two requiring improvement and three classed as good (Furness Academy, St.Bernards and Dowdales).

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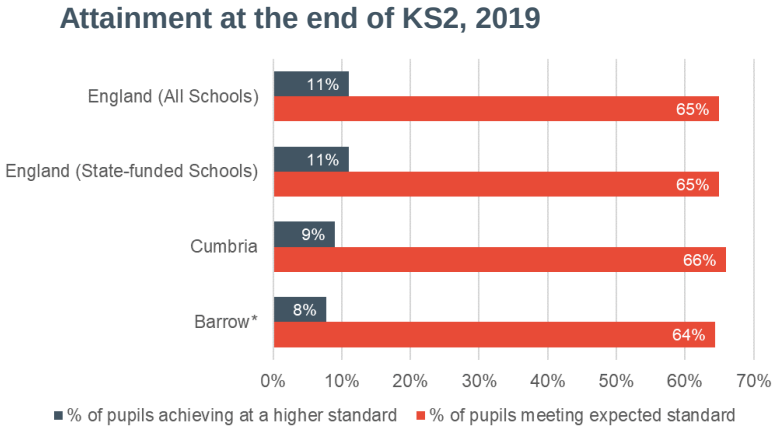
The Education Challenge
Performance

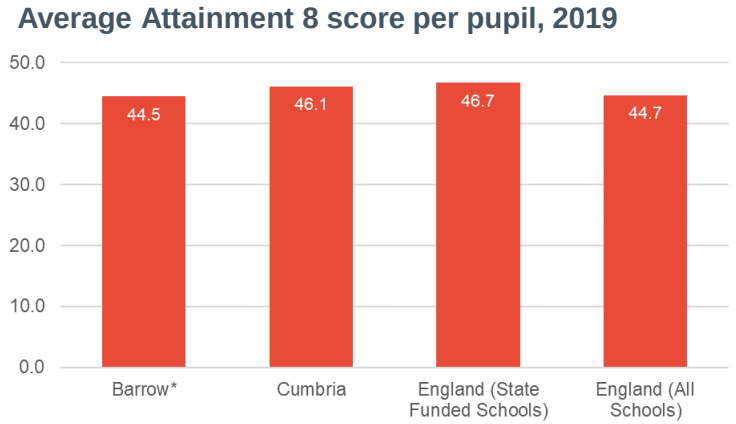
By the end of primary school education, 64% of Barrow pupils (64%) reach the expected standard in reading, writing and maths to prepare them for secondary school, which is slightly below the national (65%) and Cumbria (66%) average.

Barrow pupils achieve an average Attainment 8 score of 44.5, which lags behind Cumbria (46.1) and state-funded schools in England (46.7). There is a high level of disadvantage in Barrow's secondary schools, with eligibility for Free School Meals at 42% in Furness Academy and 33% in Walney, relative to 28% in England. Analysis by CLEP identified a disadvantage gap of -0.81 on average adjusted Progress 8 relative to 0.57 nationally. This means, on average, disadvantaged pupils in Cumbria perform around four-fifths of a GCSE grade below non-disadvantaged pupils**.



Source: Find and Compare Schools in England, DoE, 2019 ** CLEP LIS Evidence Base, 2019





* Estimated as the average of schools in Barrow.

HATCH REGENERIS

The Education Challenge
Performance

The share of pupils with a SEN Education, Health and Care plan in Barrow is higher across all levels of education, compared to both Cumbria and England.

The proportion of young people not in employment, education or training (NEET) has fallen in Cumbria, from 4.4% in 2016/17 to 3.8% in 2018/19. NEET rates in Cumbria sit well below those of comparator geographies.

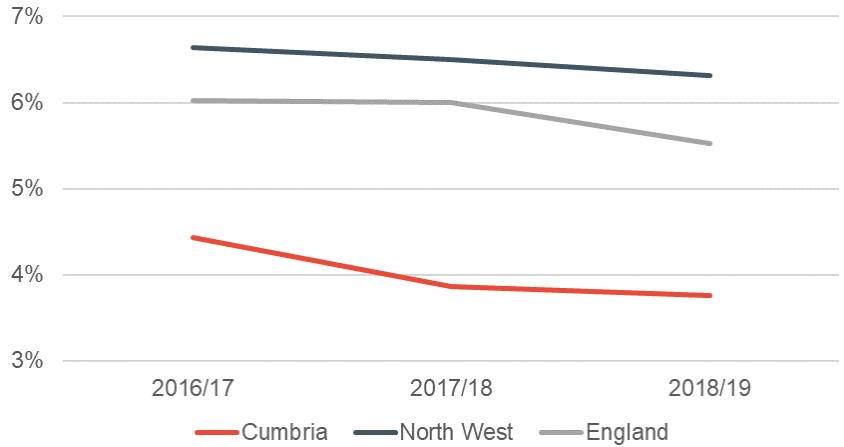
The People, Employment & Skills Strategy Group (2019) notes that the NEET rate in Barrow rose in 2018/9, not managing to sustain its 2017/8 decrease. In 2018/9, Barrow had the second highest NEET rate (4.2%) in Cumbria.

Pupils with an SEN Education, Health and Care Plan, 2018/9

	Primary	Secondary	Special
Barrow*	3.3%	3.1%	100%
Cumbria	2.2%	2.4%	99.8%
England	1.6%	1.7%	98.3%

* Estimated as the average of schools in Barrow.

Proportion of 16-17 year olds NEETs (including not known)



Source: 16-17 Year Olds Recorded in Education and Training and NEET by Local Authority, DoE, 2019; Find and Compare Schools in England, DoE, 2019; People, Employment & Skills Strategy Group: Evidence Base, CLEP, 2019

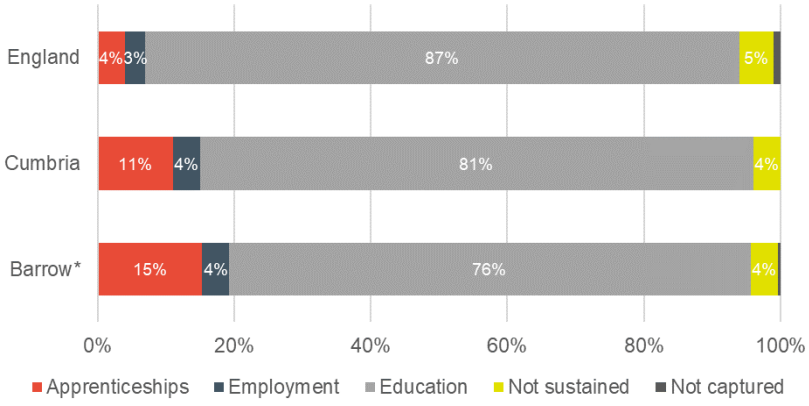
HATCH REGENERIS

The Education Challenge
Progression

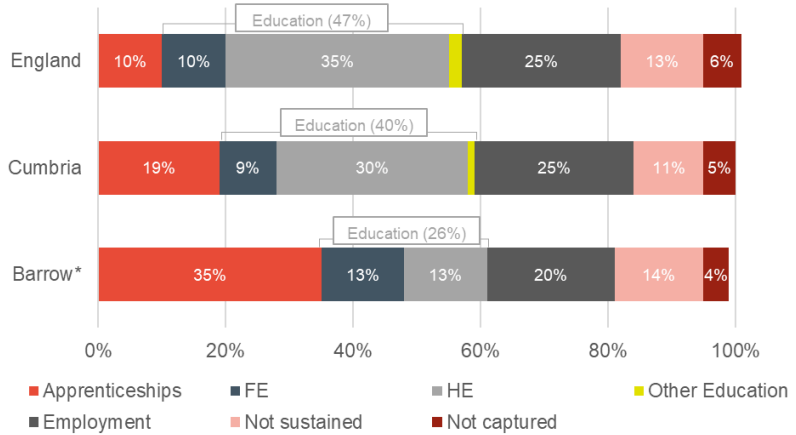
On completion of KS4, only 4% of pupils have not found a sustained post KS4 destination (such as education, apprenticeship or employment), which is in line with Cumbria (4%) and below the national average (5%). Notably, there is a greater propensity towards apprenticeship destinations in Barrow (15% of pupils, compared to 4% nationally) which contributes to a lower rate of progression to other forms of education (76%) relative to England as a whole (87%). This has been led by the growth of apprenticeships at BAE Systems in Barrow.

A similar pattern is observed in the destinations of 16 to 18 year old pupils. The breakdown of education destinations reveals that in Barrow, only 13% of pupils pursue higher education destinations, which is significantly lower than both Cumbria (30%) and England (35%). However, Barrow pupils are more likely to progress into other forms of further education (13% relative to 10% in England) which may reflect the nature of the education on offer in Barrow.

Pupils destinations after completing KS4, 2018/9



Pupils destinations after completing KS5, 2018/9



* Estimated as the average of schools in Barrow.

Source: Find and Compare Schools in England, DoE, 2019

* As captured by the destinations of Furness College pupils.

HATCH REGENERIS

The Education Challenge

Spotlight on… Furness College

Barrow is home to Furness College, a further education college, which is member of the Chartered Institution for Further Education. Following its merger with the Barrow Sixth Form College in 2016, it is the largest college in Cumbria. The College was rated GOOD by Ofsted in March 2019 and has an Excellent Quality Assurance rating for Higher Education.

The **Rating Lane Campus** has 550 students studying A Levels across 30 subjects, mainly at Level 3. The **Channelside Campus** was rebuilt in 2013 and delivers a broad range of professional and technical qualifications to 5,000 students from entry level up to Level 7.

The College has a specialism in engineering and advanced manufacturing and is recognised as a **Centre of Vocational Excellence, holding a STEM specialist accreditation**. A purpose build £4.6m Advanced Manufacturing Training Facility opened in 2016 in response to the higher level skill requirements from major projects in the town, and was used by 600 learners in 2018-19.

The College has a **longstanding relationship with BAE Systems Maritime** for the delivery of education and training, and is the largest single subcontractor in the UK for apprenticeship provision. The college and BAE Systems work extensively on the joint design of learning and training programmes, and this collaboration is nationally recognised. Other industry partners include Spirit Energy, Orsted, GSK, Kimberly Clark, and Sellafield Ltd.

The College is accredited by three Universities (Lancaster, UCLAN and Cumbria) to deliver qualifications from Level 4 up to Level 7, in addition to Higher National Qualifications offered through Pearson. In 2018-19, the college delivered 480 degree qualifications. The HE programme includes engineering, health, social work and project management.

Looking ahead, the College is exploring the opportunity presented by the Wave 2 Institute of Technology with a focus on digital supporting a range of sectors.

Source: Furness College



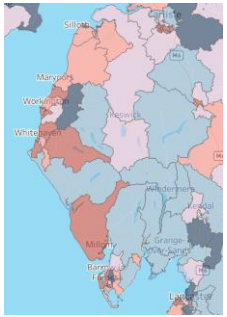
Key Learner Facts:

- 1,100 apprentices including a large proportion employed by BAE Systems
- 500 students studying higher education programmes
- 900 students studying 16-18 study programmes from L1-L3
- 800 adult learners participating in a range of technical and professional qualifications



The Education Challenge
Progression

The number of enrolments in higher education institutions by students domiciled in Cumbria was 10,600 in 2018/9, a 6% decline compared to 2014/5. Using data from the Office for Students, the young participation rate (a measure of the proportion of a young cohort who has entered HE by age 19) is estimated at 27.6% for Barrow in 2018 (the median participation rate for MSOAs in England is 40%). The areas in red illustrate where young people are least likely to participate in Higher Education.

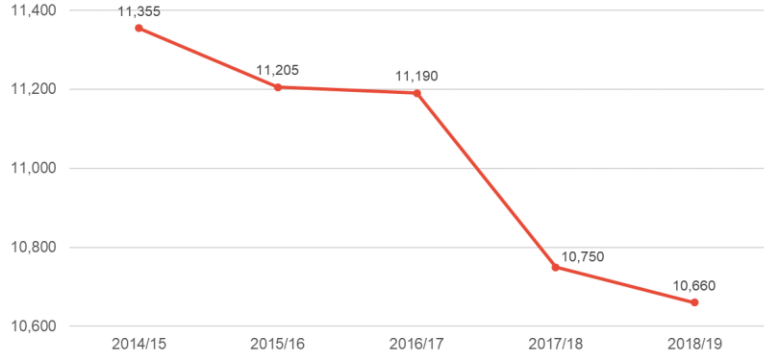




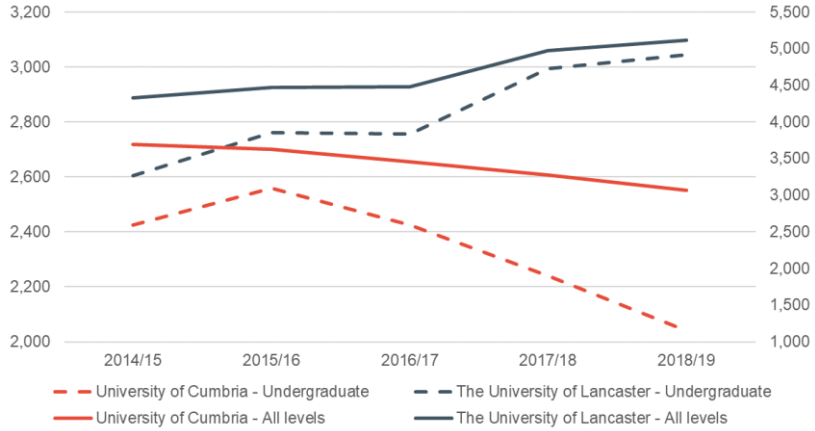
Outside of higher education provision delivered within Furness College, the nearest universities to Barrow are:

- The University of Cumbria which had 3,070 graduates in 2018/19 of which 2,040 were undergraduates
- Lancaster University which had 5,115 graduates in 2018/19 of which, 3,045 were undergraduate

Number of students living in Cumbria enrolling in HEIs in the UK



Number of HE qualifiers by level of qualification



Source: HE Student Enrolments, HESA, 2020; Young Participation by Area (Polar 4), Office for Students, 2018; Furness College (Website); HE Qualifiers, HESA, 2020

HATCH REGENERIS

The Education Challenge

Spotlight on…University of Cumbria

The University of Cumbria was established in 2007 in response to government recognition of Cumbria as a **higher education cold spot**, bringing together St Martin's College, Cumbria Institute of Arts, and UCLAN Cumbria sites. UoC has its headquarters in Carlisle, with major campuses in Ambleside, Lancaster, London and a formal presence in Workington and Barrow. In 2018/19, UoC had 9,200 students of which undergraduates accounted for 77%. Of this undergraduate population:

- 38% studied subjects allied to medicine
- 13% studied business and administration
- 9% studied creative arts and design
- 8% studied to obtain qualified teacher status

Postgraduate studies are focused on PGCE's (33%) or subjects allied to medicine (38%). The University has a strong local catchment, with 28% of undergraduates from Cumbria, and a further 27% from Lancashire or Greater Manchester.

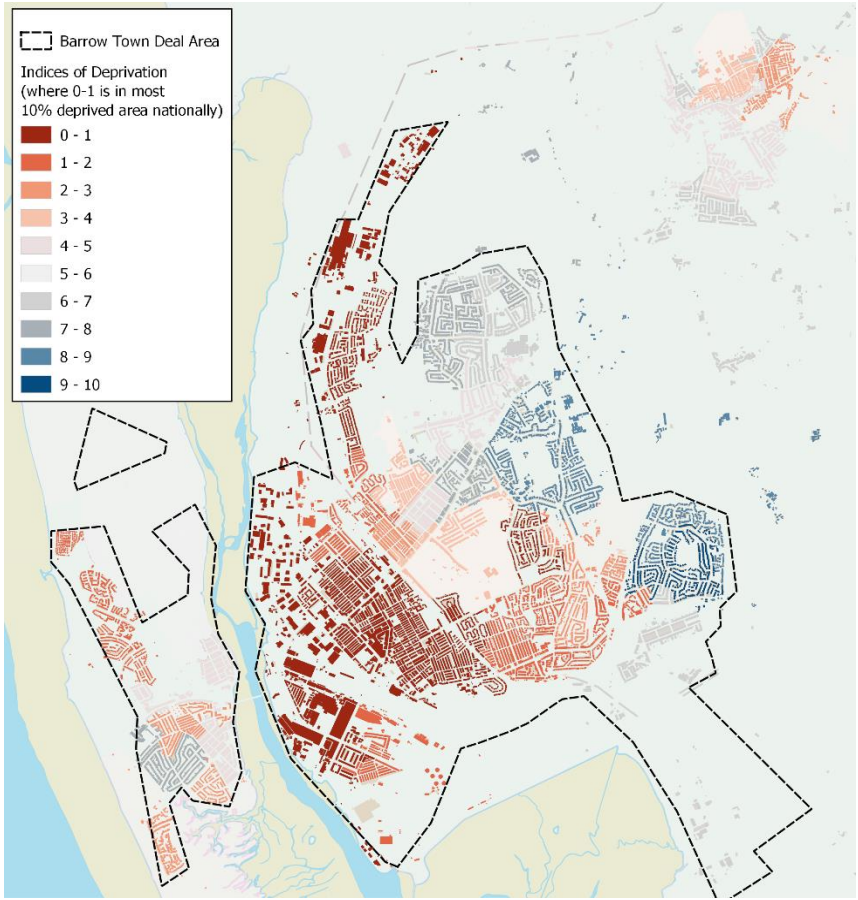
UoC has close working relationships with major employers in Barrow, including delivering courses to BAE Systems through the Institute of Business, Industry and Leadership, with the University Hospitals of Morecambe Bay NHS Foundation Trust through the Institute of Health; and working directly with schools in the Barrow Cluster through the Institute of Education.

UoC work in partnership with Furness College, and in 2018/19 there was 157 students studying at the College for a UoC award across a range of subjects including health and social care, computing, business management and engineering.

Looking ahead, UoC are exploring opportunities to extend provision in Barrow to **address identified major skills gaps in higher level skills and to help retain talented young people in the area**. Areas of identified opportunity include advanced manufacturing and health care.

Source: University of Cumbria

The Well-being Challenge
Overall Deprivation



The English Indices of Deprivation data provides, for each small area of England (lower super output area), a score for overall deprivation and deprivation in a specific domain such as housing or health.

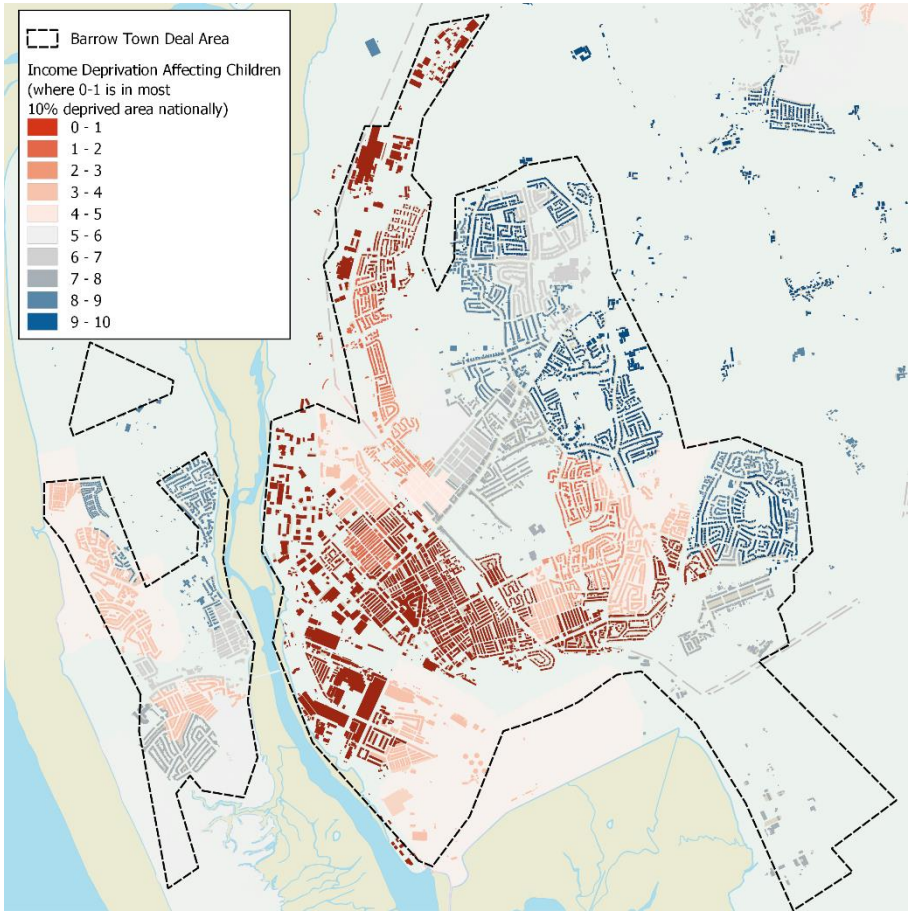
On this slide, each LSOA in the Barrow Town Deal area has been shaded according to its deprivation rank amongst all English LSOAs. A buildings layer has been included on the map to better distinguish built up areas.

A large proportion of Barrow's town centre are highly deprived. 30% of LSOAs (12 in total) in the Barrow-in-Furness Town Deal Area are within the most 10% deprived areas nationally. These areas are concentrated in the centre, with the north-western fringes of the town also experiencing high deprivation.

Conversely, some areas on the eastern fringes of the Town Deal Area constitute some of the least deprived areas in England.

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The Well-being Challenge
Income Deprivation affecting children



A specific domain in the English Indices of Deprivation data is income deprivation affecting children.

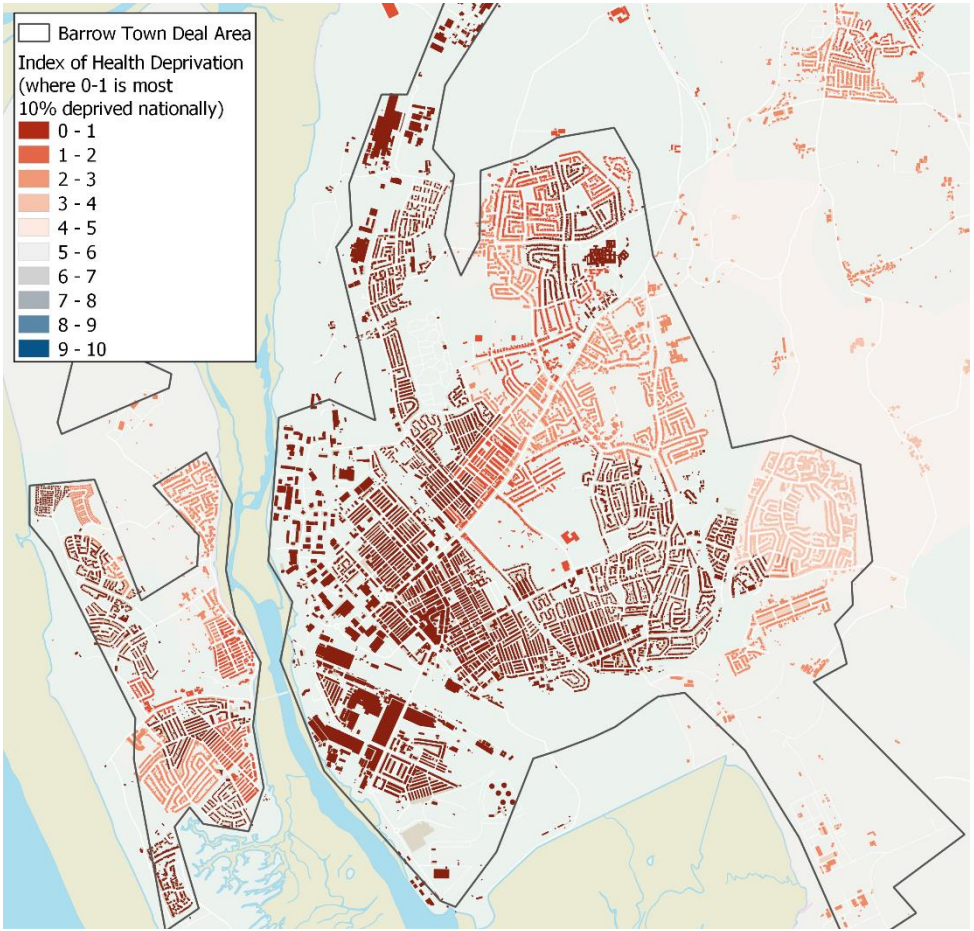
This domain displays a similar pattern across the town, with a large proportion of Barrow's town registering high deprivation in this domain - 28% of LSOAs (11 in total) in the Barrow-in-Furness Town Deal Area are within the most 10% deprived areas nationally for income deprivation affecting children.

Similarly, some areas to the north-east and east of the Town Deal area among the least deprived areas in England for this domain.

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The Well-being Challenge
Health Deprivation



Another specific domain in the English Indices of Deprivation data is health deprivation. This domain is based on indicators of physical and mental health and illness, as well as life expectancy.

Virtually all of Barrow-in-Furness is in the top half of all areas nationally for health deprivation, with a significant proportion of the town in the most 10% deprived – including almost all of the town centre, the industrial fringes to the north and east, and parts of Walney Island. Suburban areas to the north east and east are the least deprived within the town, but are still deprived in terms of health relative to most other parts of England.

With no parts of the Barrow Town Deal Area scoring positively in the health domain the large scale of the health and well-being challenge is made clear.

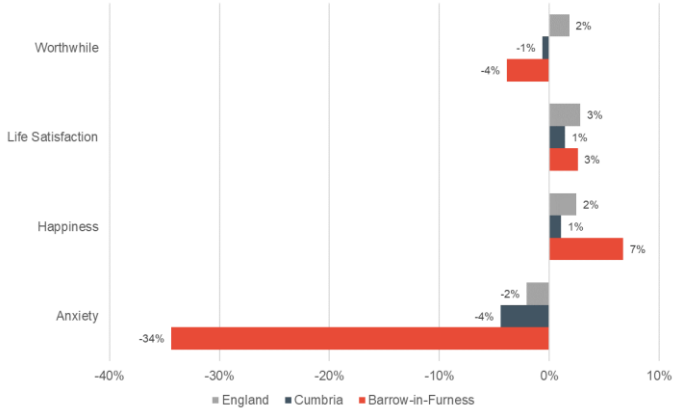
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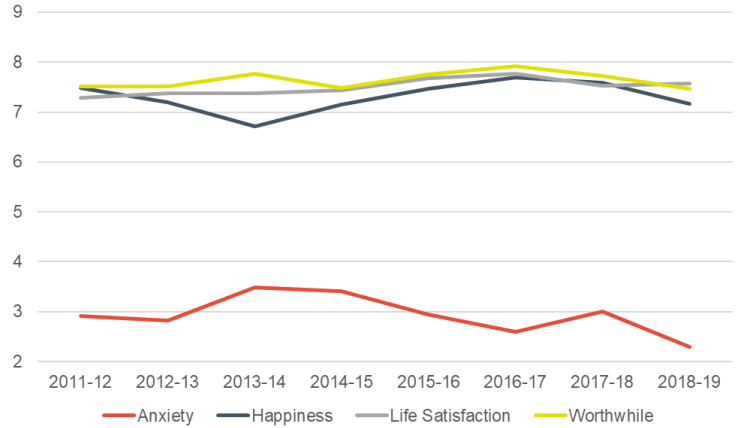
The Well-being Challenge
Health & Well-being

Barrow's well-being performance is optimistic on the whole. In Barrow, life satisfaction ratings are overall stable, and have shown modest improvement (3%) over the last five years. A persistent decline (34%) in anxiety levels has been observed since 2013/14. Happiness levels have recovered (+7%) following a sharp fall in 2013/14, albeit remaining slightly below their 2011/12 levels. However, feelings that things done in life are worthwhile have worsened (-4%) over the last five years and rating are below those in 2011/12. Well being measures across Cumbria and England have remained broadly constant over the last five years, with modest improvements being noted in terms of life satisfaction, happiness and anxiety.

Change in levels of well-being indicators, 2013/4 – 2018/9



Barrow's levels of well-being indicators over time



Source: Personal Well Being Estimates by LA, ONS, 2019

HATCH REGENERIS

The Well-being Challenge
Health & Well-being

The life expectancy of Cumbria's female residents (83) is in line with England and one year higher compared to the rest of the North West. Whilst male residents' life expectancy (79) is also one year higher than that in the North West, it is lower compared to England (80).

In Cumbria, the proportion of life spend in good health by female and male residents is 80%. Cumbria's female population appears to enjoy a longer proportion of their life in good health compared to the North West and England, where healthy life expectancy amounts to 76% and 77% of the total. The rates noted for males are broadly in line with that of comparator geographies.

However, at a more localised level, 53% of Barrow's LSOAs are amongst the most deprived nationally, according to the health deprivation and disability sub-domain of the Indices of Deprivation. Barrow ranks 5th worst nationally, in terms of this metric.

Life Expectancy and Healthy Life Expectancy, 2016-8*

Area	Female			Male		
	Life expectancy at birth	Healthy life expectancy at birth	% life in good health	Life expectancy at birth	Healthy life expectancy at birth	% life in good health
Cumbria	83	66	80%	79	63	80%
North West	82	63	76%	78	62	79%
England	83	64	77%	80	63	80%

* Data are aggregated over three consecutive years.

Source: ONS Health State Life Expectancy, 2019; English Indices of Deprivation, 2019

HATCH REGENERIS

The Well-being Challenge
Community Safety

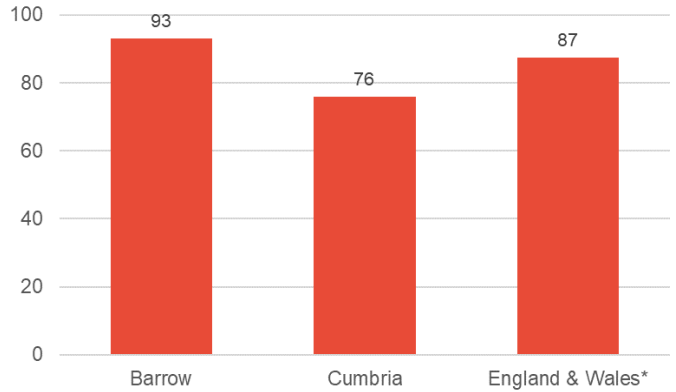
In 2019, the number of total recorded crimes was 6,300 in Barrow. This amounts to rate of 93 offences per 1,000 people which places Barrow's crime rate at a notably higher level than Cumbria (76) and England & Wales (87).

However, Barrow has witnessed a smaller increase (45%) in the incidence of crime since 2014, relative to Cumbria (58%) and England & Wales (51%).

Total Recorded Crime (excluding fraud), 2014-19

	2019**	% change (2014-19)
Barrow	6,300	45%
Cumbria	37,900	58%
England & Wales*	4,923,400	51%

Recorded crime rate per 1,000 population, 2019



* In 2019, Greater Manchester Police is excluded from national and regional totals. For consistency, it has been removed in calculations involving 2014 totals here.

Source: Crime in England and Wales – Community Safety Partnership Tables, Home Office, 2014-19

** Figures rounded to nearest 100.

HATCH REGENERIS

The Well-being Challenge
Social Mobility

In 2017, there were 980 children living in workless households in Barrow, accounting 13% of all children living in households where no one over the age of sixteen is in employment. This proportion is significantly higher than the Cumbria average (8%) and national average (10.5%).

Barrow has seen an improving picture, with a 26% decrease in the number of children in workless households since 2012, which is lightly below the reduction experienced in Cumbria and England.

The Social Mobility Index (SMI) compares the chances for children from a disadvantaged socio-economic to do well in life across different local authorities. Social mobility is relatively low in Barrow, with the borough ranking 280th out of 324 local authorities.

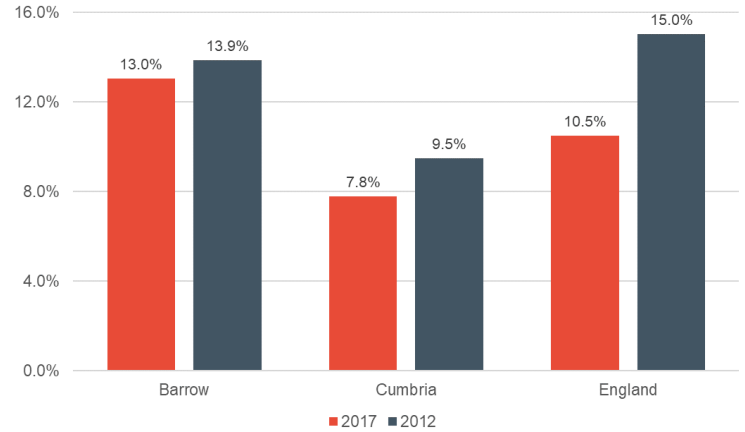
Social Mobility Index, 2017

	Overall	Early Years	School	Youth	Adulthood
Barrow	280	264	280	212	174

Children in Workless households , 2012-17*

	2017**	% change (2012-17)
Barrow	980	-25.8%
Cumbria	5,600	-26.9%
England	1,116,700	-26.5%

Proportion of children in workless households, 2012-17*



* Data for 2017 are provided here, as estimates for Barrow in 2018 were supressed due to small sample size.

** Figures are rounded.

Source: Workless households for regions across UK 2018, ONS, 2019; Social Mobility Index, ONS, 2017

HATCH REGENERIS

The Well-being Challenge
Open Space

Barrow Borough has a wealth of Green Infrastructure, including a number of statutorily designated sites such as Ramsar sites, Special Areas of Conservation, Special Protection Areas, Sites of Special Scientific Interest and National Nature Reserves. Alongside designated sites there is an informal network of open green spaces connecting the open countryside and coastline to locally important amenity areas, play spaces, parks, allotments and gardens. Ensuring that the green infrastructure and natural assets of the Borough are maintained and enhanced is a cornerstone of the Borough's growth strategy.

To protect, enhance and connect the green infrastructure of Barrow Borough, the Council has designated certain sites and connectivity routes as Green Infrastructure within the Local Plan. There are five classifications of Green Infrastructure. These are:

+ Green Wedges – large areas of green open land with specific physical and visual importance that are particularly key in maintaining separation between settlements
+ Green Corridors – Sections within a site that can accommodate a development's infrastructure in a landscape-led way
+ Green Spaces – spaces in the urban area that provide amenity or recreational space
+ Green Routes – strategic and local transport routes that are green in character
+ Green Links – Visual and physical connections with other Green Infrastructure assets

Green spaces in Barrow in Furness



Source: Barrow Borough Council

The Well-being Challenge
Open Space

Green Infrastructure is important for the health and wellbeing of the community. Green Infrastructure offers not only opportunities for recreational activities which benefit the physical health of the population, but it also gives communities a place to relax and unwind and is proven to have a positive effect on mental wellbeing. This is recognised in the Cumbria Joint Public Health Strategy 2019.

Green Infrastructure helps to offset climate change through mechanisms like sustainable drainage, woodland planting and providing important habitats for wildlife.

Most of the community of Barrow have sufficient access to natural green space and these measurements are in line with Natural England's Accessible Natural Greenspace Standards. This green space contributes to the attractiveness, functionality and viability of the borough as a place to live, work and visit.





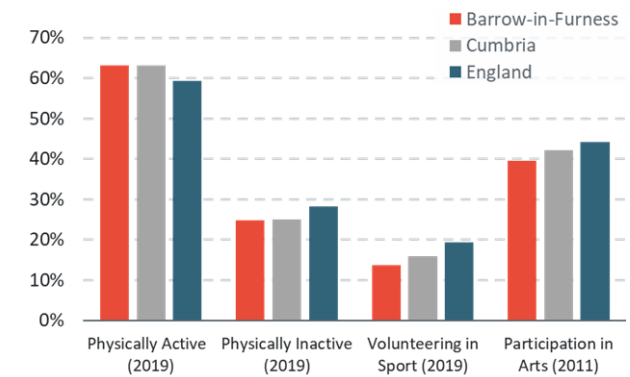


Source: Barrow Borough Council

The Well-being Challenge
Culture and Leisure Participation

Barrow enjoys access to a range of cultural, leisure and physical activity assets, including a host of sports clubs. As such, Barrow's levels of physical activity (150+ minutes of activity per week) are around 4% higher than England's, also with fewer inactive people.

Whilst data on participation in the arts is almost a decade old, Arts Council England estimated the participation in the arts (either events or activities) is around 5% lower in Barrow than the national average. This suggests there is scope to leverage existing assets further to enhance participation.



Leisure and Culture	Type	Description
Holiday Inn Express	Visitor Economy	£217 room hotel following £13m investment
Central Barrow Conservation Area	Heritage	Historic England recognised area
Dock Museum	Heritage	50,000+ visitors per year
Furness Abbey	Heritage	Grade I listed site of 12th century abbey
Walney Coast (Earnse Bay)	Natural	Popular with walkers and watersports
Barrow Central Library	Arts and Culture	Undergoing renovation
Marina Village proposals	Marina	To include 400-berth marina
Hollywood Park	Retail and Leisure	Includes retail, fitness gym, bingo, casual dining, cinema
Hindpool Retail Park	Retail and Leisure	Includes retail and casual dining
England Coast Path	Visitor Economy	Passes through the Town
The Forum	Arts and Culture	Multi-use theatre venue
Art Gene Gallery	Arts and Culture	Contemporary arts centre
The LazerZone	Leisure	Laser tag facility
Club M	Nightclub	£1.2 m venue
The Nines	Nightclub	Cabaret, bar, entertainment
Manhattan's	Nightclub	Sports bar and club
Channelside Haven	Natural	Concept urban park
Barrow Park	Natural	45 acre public park

Physical activity	Type	Description
Urban Extreme	Skatepark	Charity-ran bmx and skateboard park
Barrow Sailing Club	Sports Club	Based in Port of Barrow
Park Leisure Centre	Sports facility	Includes gym, hall, courts, pool
Hoops Basketball Centre	Sports facility	Includes hall, courts, athletics
Hawcoat Park Sports Club	Sports facility	Includes sports pitches
Furness Academy	Sports facility	Includes track and field, pitches, studios, gym
Seaview Riding School	Sports Club	Riding lessons and equestrian club
Lakes Gliding Club	Sports Club	Based at Walney Airfield
Barrow Raiders and 10 amateur rugby clubs	Sports Club	BRRLFC play in the 2nd tier of rugby league
Barrow AFC and 12 amateur football clubs	Sports Club	BAFC play in the 5th tier of football
11 Bowling Clubs	Sports Club	-
At least 2 Boxing Clubs	Sports Club	-
4 Members only swimming clubs	Sports Club	-
2 Cycling Clubs	Sports Club	-
4 Athletic Clubs	Sports Club	-
7 Cricket Clubs	Sports Club	-
3 Golf Clubs	Sports Club	-
7 Gyms	Fitness Gym	-

Source: Barrow Borough Local Plan 2016-31; Barrow Borough Council; Hatch Regeneris; Active Lives (2019); Arts Council

HATCH REGENERIS

The Well-being Challenge
Culture & Heritage



Barrow has successfully developed a healthy, independent and influential cultural society.

Barrow has an unusually high number of arts organisations working with various agencies to improve the quality of life in the town. There are over 20 ranging from the Council managed theatre on the high street to small charitable organisations across every artform. They include a number of core funded arts organisations of regional and national renown. There are 3 Arts Council England 2019 'National Portfolio Organisations' (NPOs), Art Gene, Ashton Group and Full of Noises located within the town who represent ¼ of the NPOs of Cumbria, serving 18% of Cumbria's population on the Furness Peninsula.

Local arts organisations represent a vibrant sector with the potential to spearhead cultural activity such as exhibitions, installations, festivals and events to increase engagement and improve the vitality of the town.

The council owned Dock Museum and The Forum theatre provide residents and visitors with access to a range of exhibitions, shows and experiences for all ages.

Barrow has a wealth of heritage assets including listed buildings, statues, parks and conservation areas. Heritage is important to the local economy with some of the towns significant visitor attractions being based upon their heritage, providing opportunities for learning about the history of the area including shipbuilding and the iron and steel industry upon which the towns economy was built.

The local character and distinctiveness of the town provide a sense of place and pride for residents and have a positive impact on the quality of the built environment and attractiveness of the town.

Source: Barrow Borough Council

The Well-being Challenge
Tourism & Leisure

Barrow has a wealth of tourist attractions, including a number of historic buildings such as Furness Abbey and Piel Castle, and benefits from its coastal location and natural environment. Business Tourism is an expanding sector and the town's accommodation offer is growing annually. Opportunities exist for economic development and regeneration to develop the town's potential for tourism.



Good physical and mental wellbeing are central to people's ability to participate fully in society and enjoy a high quality of life. The vision for the Town Deal envisages a place where everyone is able to lead a healthy life, take part in active recreation and leisure and receive high quality healthcare services.

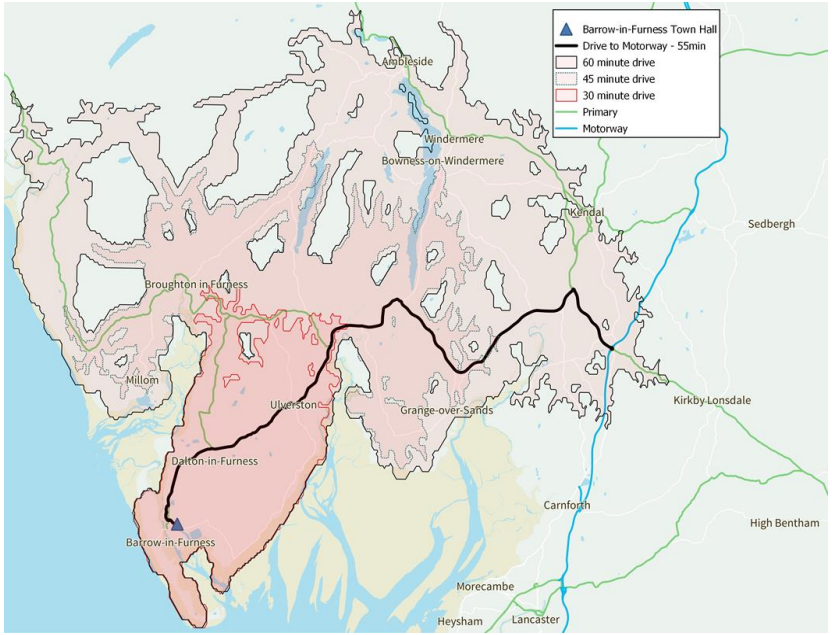
Sport and physical activity contribute positively to social inclusion, regeneration, community safety, lifelong learning and health improvement. Barrow currently has some of the poorest health statistics in the country and there is a clear link that health is influenced by lifestyle choices, environment and other socio economic factors.

There are a wealth of opportunities within Barrow where residents can partake in informal recreation and leisure activity free of charge such as parks, footpaths, woodland, beaches and dunes. Barrow also has a range of leisure facilities including cinemas, laser zone and soft play, swimming pools, gyms and fitness centres, dance studios, 3G pitches, a running track and other sports facilities.

Source: Barrow Borough Council

HATCH REGENERIS

The Connectivity Challenge
Distance



Barrow's peripherality impacts on the nature of commuting. Barrow is a relatively self-contained TTWA area and is principally served by the three housing markets of Barrow and Ulverston, Whitehaven and South Lakeland. However, the draw of employment in major projects in Barrow has contributed to a 'tidal' workforce who travel to Barrow mid week and return back to their main place of residence at weekend.

Road and rail links in Barrow provide vital connections, however the road network has significant pinch points along the A595 and A590, with serious resilience and reliability issues due to the lack of alternatives and the single carriageway nature of the roads.

Connectivity to other urban centres is made difficult by Barrow's coastal-peripheral situation, with a drive of almost 1 hour (at peak hour) to the nearest motorway junction at the M6 (around 54km away). Lancaster, the nearest city, is well over an hour away by car and other nearby cities are more than two hours away by car or train. 67% of Barrow residents travel by private vehicle to work, with a further 7.2% travelling by public transport.

Poor rail connectivity with other hubs in the North West is also demonstrated by the fact that it is quicker to drive to both Liverpool and Manchester than taking the train. Furthermore, the train ratio for Manchester is double that of London – meaning that distance is covered twice as quickly on a journey to the latter.

A high proportion of workers travel by bicycle/foot to work (24% compared to 14.5% nationally) highlighting the importance of active travel routes.

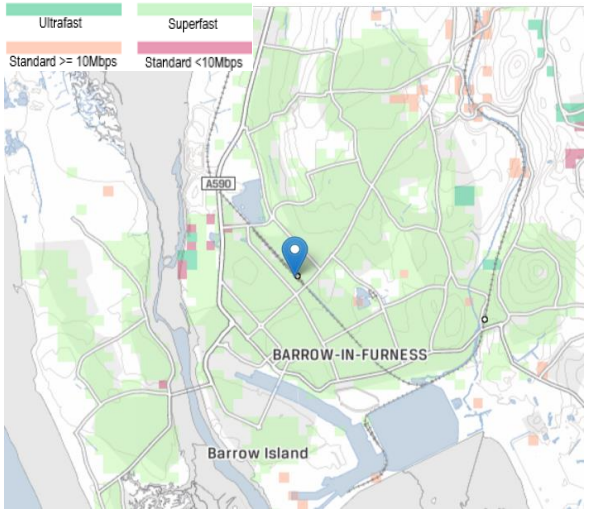
Area	Drive from Barrow (mins)	Train from Barrow (mins)	Distance (miles as the crow flies)	Drive ratio	Train ratio
Lancaster	72	60	17.6	4.1	3.4
Preston	91	82	31.8	2.9	2.6
Liverpool	140	155	49.3	2.8	3.1
Manchester	126	132	59	2.1	2.2
Carlisle	106	151	55.4	1.9	2.7
London	337	253	221.5	1.5	1.1

Source: Igeolise based on drive time at 8am (weekday); Google, Trainline. NB: data not adjusted for peak hour traffic. *ratios obtained by dividing travel time by distance; Census, 2011

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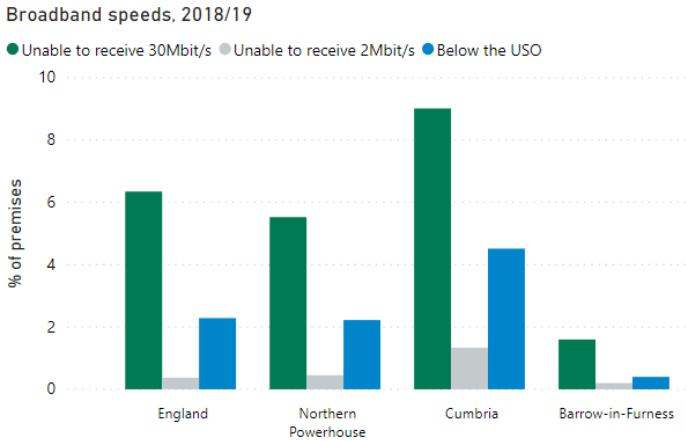
The Connectivity Challenge
Digital

At superfast speeds (>24 Mbps), Barrow is well served by the broadband network, with over 99% of premises having access to superfast speeds. This is illustrated on the adjacent map from Ofcom, which shows the core Town area being virtually covered by superfast. Furthermore, a tiny proportion of premises in Barrow do not have access to broadband that meets the Universal Service Obligation for broadband, compared to at least 2% of premises nationally. In terms of 4g mobile coverage, Barrow has similar access to the national and regional average, although is less fortunate than Cumbria as a whole which has above par levels of 4G provision.



However, superfast technology is being superseded with the current rollout of gigabit capable Full Fibre, to which only <1% of premises in Barrow have access. The same applies with Ultrafast, only very small pockets of the borough currently have access. Full Fibre will become the commercial standard, so it is important that Barrow begins to significantly increase its access.

The government plans to subsidise the rollout of Full Fibre to the hardest to reach 20% of the country, but given Barrow's current levels of superfast connectivity, it is unlikely that the Town area will fall within this 20%. Furthermore, Barrow also enjoys a very low percentage (<1%) that are unable to receive the current Universal Service Obligation.



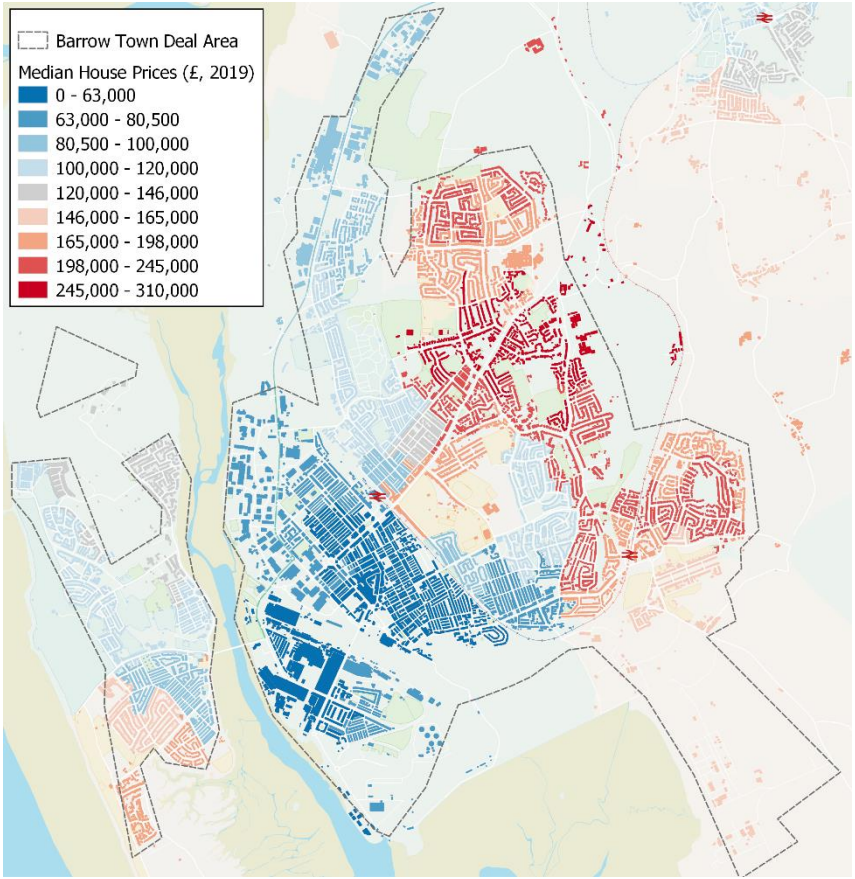
However, with the first phase of the Digital Borderlands Voucher Scheme submitted to the government, worth c. £4m, Barrow could see support in tackling specific not-spot locations.

At the time of writing, significant numbers of UK employees are working from home due to Covid-19, driving up demand for home broadband. Essentially a stress test of current coverage, this will provide valuable new information to the Council on areas of opportunity which could be leveraged with intervention.

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The Housing Challenge
Affordability



Overall, the median house price in the borough in 2018 was £122,500. This was below the median for Cumbria (£165k), the North West (£160k), and England (£239,000).

The map illustrates pricing above (in red) and below (in blue) the Barrow median house price. There is a stark contrast in house prices within the Barrow Town Deal area, with areas to the north and east registering house prices closer to the England benchmark, whilst central and peripheral parts of the town to the north-west and west show prices well below that of the England median, with the lowest prices frequently below £100,000.

House prices in Barrow have also been growing at a slower pace than England – increasing by only 23% since 2013 compared to 29% nationally.





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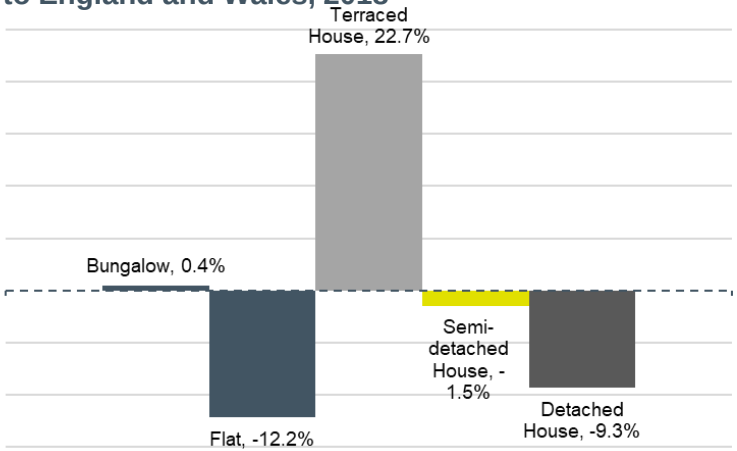
The Housing Challenge
Affordability & Mix

The data shows Barrow-in-Furness to possess good access to affordable housing, relative to other parts of England. Affordability ratios are composed of median house prices and median resident-based earnings, with a lower ratio indicating that prices and earnings are closer together (affordable) – Barrow's affordability ratio is well below the North West and England's.

The English Indices of Multiple Deprivation contains a domain specific to barriers to housing and services. For this domain, most areas in Barrow fall within the least deprived parts of England – suggesting good access to housing in the Town.

Area	Median house prices		Affordability ratio*	
	2018	Change since 2013	Value	Change since 2013
Barrow-in-Furness	£122,500	23%	3.64	1%
Cumbria	£165,000	18%	5.62	9%
North West	£160,000	23%	5.82	-14%
England	£239,000	29%	8.00	18%

Barrow-in-Furness Housing Stock Composition relative to England and Wales, 2018



Relative to England and Wales, Barrow has fewer flats, semi-detached and detached houses, and significantly more terraced houses. Almost half of Barrow's housing stock of 33,500 was terraced housing in 2018 at around 16,340 units. Semi-detached houses were the second most common type of dwelling (7,480 - 23% of total), followed by flats (3,510 – 11%), then bungalows (3,380 – 10%), and detached houses (2,190 – 7%).

Copyright © Hatch 2018. All Rights Reserved. Data source: ONS House price to residence-based earnings ratio, 2019. *NB: lower ratio indicates affordability. A higher (increasing) ratio indicates lower affordability.

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The Housing Challenge
Tenure & Condition

Private renting is less prevalent in Barrow, with around 5% fewer residents renting their accommodation from a private sector landlord. Similarly, Barrow has over 11% more owner occupiers as a proportion of residents than England. This reflects a shrinking proportion (-4.8%) of private renters and growing proportion of owner occupiers (+5.1%) in Barrow since 2013, compared to the relatively static national trend.

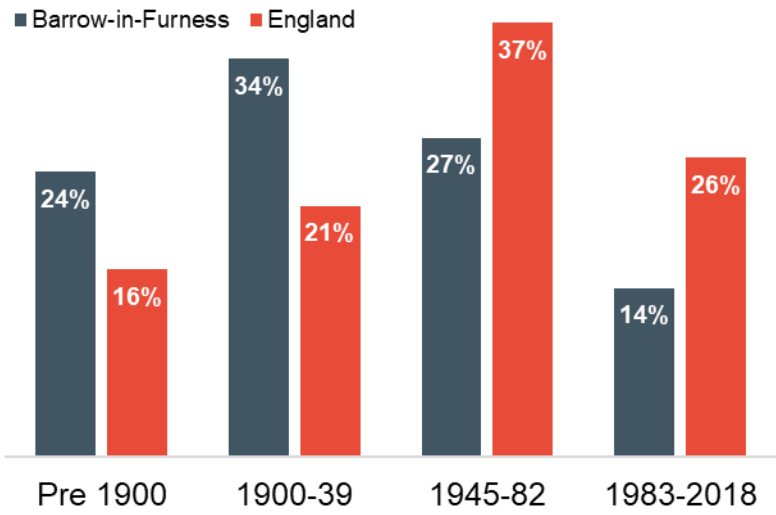
Barrow has a substantially smaller proportion of social and public sector renters than England as a whole, with 10% of housing tenure in Barrow – 7 percentage points less than England. There has been little change in this proportion since 2013, with a decrease of just 0.3%, virtually mirroring the national trend.

In 2018, Barrow saw approximately 18 net additional dwellings per 10,000 residents, compared to around 43 net additional dwellings per 10,000 residents across England. Both figures were up approximately 70% from 2013. As such, whilst Barrow has experienced growth in housebuilding in line with England, far fewer dwellings are being constructed relative to the size of the population.

Barrow's housing stock is generally much older than the national average. Almost half the residential properties in Barrow were constructed before the second World War, with a further third constructed between 1900-1939. Properties built after 1982 make up only 14% of the borough's housing stock, compared to over 25% in England as a whole. A recent stock modelling report identified between 18-21% of privately owned and privately rented housing in Barrow have category 1 Housing Health and Safety Rating System hazards.

	2018			Change since 2013		
	Privately rented	Owner occupied	Public and social	Privately rented	Owner occupied	Public and social
Barrow-in-Furness	15%	74%	10%	-4.8%	5.1%	-0.3%
England	20%	63%	17%	0.7%	0%	-0.4%

Proportion of housing stock by build period, Barrow and England



Copyright © Hatch 2018. All Rights Reserved. Data source: Gov.uk Council Tax Stock of Properties, 2018; MHCLG, Net Additional Dwellings by Local Authority; BRE Stock Modelling Report, 2019

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The Commercial Challenge

Demand & Supply

Office and Industrial Markets

The Cumbria Employment Sites and Premises Study[1] recognises that Barrow is a hub of advanced manufacturing and innovation and is host to the design and construction of a new generation of submarines to carry the UK's independent nuclear deterrent. Barrow Port has a key role in delivering the submarine programme and in providing world-class marine engineering services to the offshore energy sector. The Council and local stakeholders are working to maximise the opportunities presented by current growth and investment in Furness, strengthening supply chain presence and using current prosperity to create a more diverse and resilient economy.

The town is currently experiencing a period of investment and economic growth through the nationally significant Dreadnought submarine programme that will support companies locally and is a catalyst for local economic growth.

Based on the growth of the Barrow economy on the back of the Dreadnought programme and a large offshore wind sector, the demand for commercial space appears high with vacancy rates for office and industrial premises being lower than the national average. A 2018 Study into Managed Workspace* identified market failures, with developers unwilling to build speculatively due to the costs involved in bringing the sites forward for development and a perceived poor return on investment. The draft ESPS suggests that whilst there is consistent demand for smaller employment space the stock of both office and industrial premises does not offer the type of space sought, highlighting supply limitations in Barrow. However, the study recognises that Barrow has a number of well positioned strategic sites that could help meet current and future industrial and office market demand.

Retail Market

The retail market has been facing a number of challenges nationally in recent years, including the growth of online retail and large retailers such BHS and House of Fraser disappearing from the High Street. The recent retail vacancy survey[2] carried out by Barrow Borough Council highlights that Barrow is facing these challenges with vacancy rates across Barrow town centre (17% - A1 uses), significantly higher than the national average (11%). The survey also shows that demand for A1 retail has been limited in Barrow town centre for a prolonged period with a number of premises being continuously vacant for over 5 years.

Despite the down turn in demand for A1 uses there has been consistent demand for A4 uses (restaurants and cafes) which has seen some demand in the last 5 years, across the town centre. With the role of town centres shifting from retail uses to leisure uses, Barrow town centre could see further growth in the restaurant and café market.

[1] LSH, Cumbria Employment Sites & Premises Study, 2019; [2] Barrow Borough Council, Retail Survey – Vacancy Report, 2019; FEDF Demand & Supply of Managed Business Space, 2018

Copyright © Hatch 2018. All Rights Reserved. Data source: CoStar, 2020

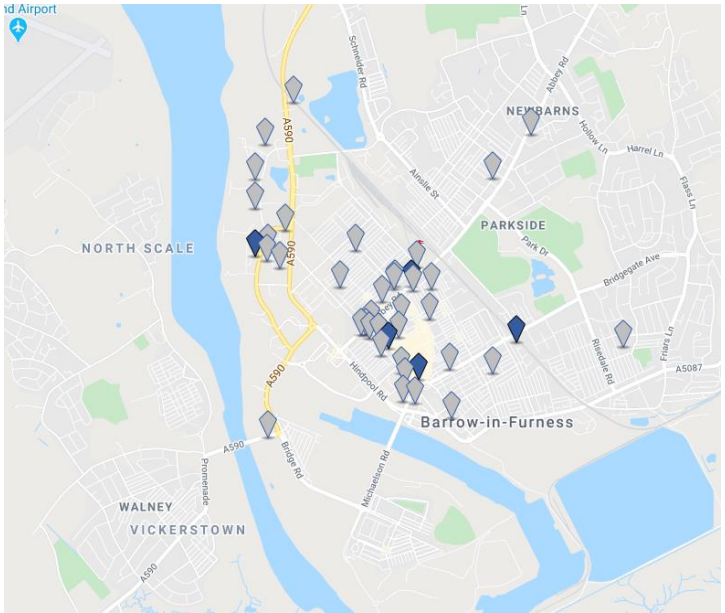
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The Commercial Challenge
Demand & Supply - Office

Headline Indicators (Δ past 12 months - CoStar)

INVENTORY SF	UNDER CONSTRUCTION SF	12 MO NET ABSORPTION SF	VACANCY RATE	MARKET RENT/SF	MARKET SALE PRICE/SF	MARKET YIELD
488 K 0%	0 -	(11.9 K) -103.2%	6.4% +2.6%	£8.92 -3.5%	£113 +2.6%	9.4% -0.1%
Prior Period 488 K	Prior Period 0	Prior Period (5.9 K)	Prior Period 3.8%	Prior Period £9.25	Prior Period £110	Prior Period 9.5%

Total Office Stock



CoStar commercial property market data suggests that there has **been no increase in overall office market stock** (488k sq.ft) within Barrow over the last 12 months, which is echoed by the latest Cumbria Employment Sites and Premises Study[1] (ESPS) .

CoStar and the ESPS[1] show a discrepancy in office vacancy in Barrow with CoStar suggesting the **vacancy rate could be as high as 6.4% whereas the ESPS estimates the vacancy rate to be around 3.6%.** It is possible the discrepancy could be linked to Newspaper House which is listed as vacant but is currently under offer. The **ESPS suggests that the stock of available office property provides limited availability to meet local demand** and **enquiries are relatively consistent for smaller employment space**, which are hampered by supply limitations.

CoStar and the ESPS suggest office market rents are in the region of **£9 - £9.50** per sq. ft which is in line with market rents across Cumbria. There is currently **no new office stock under construction** and only **one lease deal was completed in the last 12 months**, which was for a small area of floorspace (c. 2,000 sq. ft).

CoStar data suggests the majority of stock is between 2-3 stars, which would **indicate poor quality** with the vast **majority of stock being built pre-2000**.

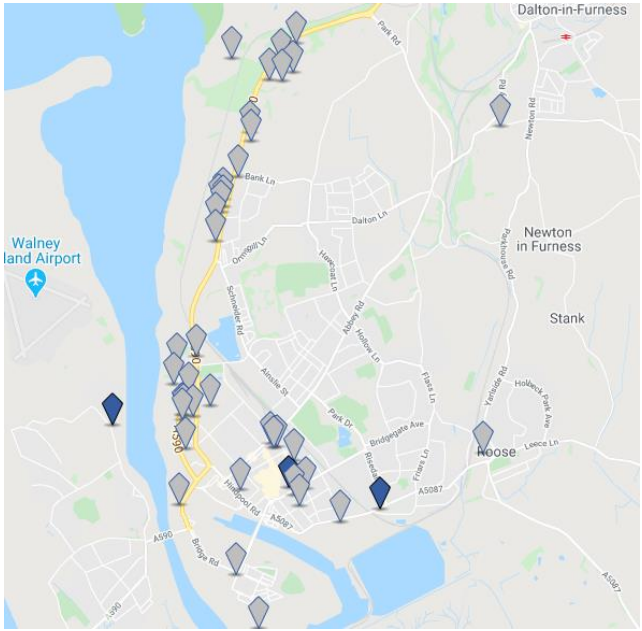
Copyright © Hatch 2018. All Rights Reserved.
Data source: CoStar, 2020; LSH, Cumbria Employment Sites & Premises Study, 2019

The Commercial Challenge
Demand & Supply - Industrial

Headline Indicators (Δ past 12 months - CoStar)

INVENTORY SF	UNDER CONSTRUCTION SF	12 MO NET ABSORPTION SF	VACANCY RATE	MARKET RENT/SF	MARKET SALE PRICE/SF	MARKET YIELD
901 K 0%	0 -	1.1 K -94.9%	0.5% -0.6%	£4.30 +5.1%	£66 +3.9%	7.2% +0.1%
Prior Period 901 K	Prior Period 0	Prior Period 21.7 K	Prior Period 1.1%	Prior Period £4.09	Prior Period £64	Prior Period 7.1%

Total Industrial Stock



Both CoStar and the ESPS record **no change in industrial market stock over the last 12 months** with stock remaining the same (c. 900,000 sq. ft). The **increase in new stock across Cumbria has also been low** (<1% increase).

According to the aforementioned market sources, **vacancy rates are low at below 1%** which has **fallen over the last couple of years**. Based on CoStar data this appears to be linked to the take-up of a relatively large premises (16,000 sq. ft) at Park Road. The ESPS report notes that following recent investment in the Dreadnought submarine programme (BAE Systems) continues to be the main economic driver for Barrow and is supported by a number of associated supply chain companies based in the town and the wider Furness area.

Market rents are currently between £4 - £4.50 per sq. ft, slightly below the Cumbria average (£5 per sq. ft). There is currently **no new industrial space under construction** and similar to the office market, **the stock of industrial premises is dated** with the majority of stock pre-dating 2000. However, new industrial premises were built at the BAE Systems complex in 2017.

The ESPS also observed that the stock of available industrial premises does not provide the type and fit-for-purpose space needed to meet local demand. As with office premises, the number of enquiries for industrial premises are consistent for smaller employment space, which the current stock cannot satisfy.

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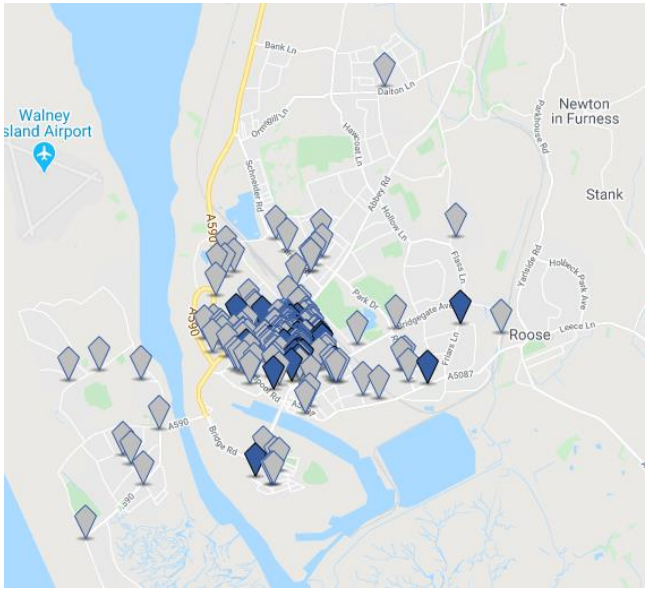
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The Commercial Challenge
Demand & Supply - Retail

Headline Indicators (Δ past 12 months - CoStar)

INVENTORY SF	UNDER CONSTRUCTION SF	12 MO NET ABSORPTION SF	MARKET RENT/SF	MARKET SALE PRICE/SF	MARKET YIELD
1.7 M 0%	0 -	32.3 K +460.1%	£11.50 -1.7%	£111 -4.6%	7.5% +0.2%
Prior Period 1.7 M	Prior Period 0	Prior Period 5.8 K	Prior Period £11.70	Prior Period £116	Prior Period 7.3%

Total Retail Stock



The source for the majority of retail market intelligence is CoStar, as the ESPS did not assess the retail market in any detail however, the Barrow Borough Council Retail Vacancy report has helped inform vacancy rates analysis.

As with industrial and office stock, CoStar data suggests, that there has been **no increase in retail stock over the last 12 months**, with stock remaining in the region of 1.7m sq.ft. This **mirrors the trend at the Cumbria level**, which has seen a marginal increase in retail stock (c. 1% increase).

Barrow Borough Council report estimates **retail vacancy rates are currently around 17%,** which is significantly higher than the national average (11%) and highlights demand for retail in Barrow is low. It is also **apparent that there are a number of long term vacancies** across the town centre, with **nine units being continuously vacant for over 5 years**. The recent announcement of Debenhams filing for administration could have a impact on the levels of vacancy.

Market rents have decreased over the last 12 months and are currently at **£12 per sq.ft** which is **lower than the Cumbria average (£15 per sq.ft).**

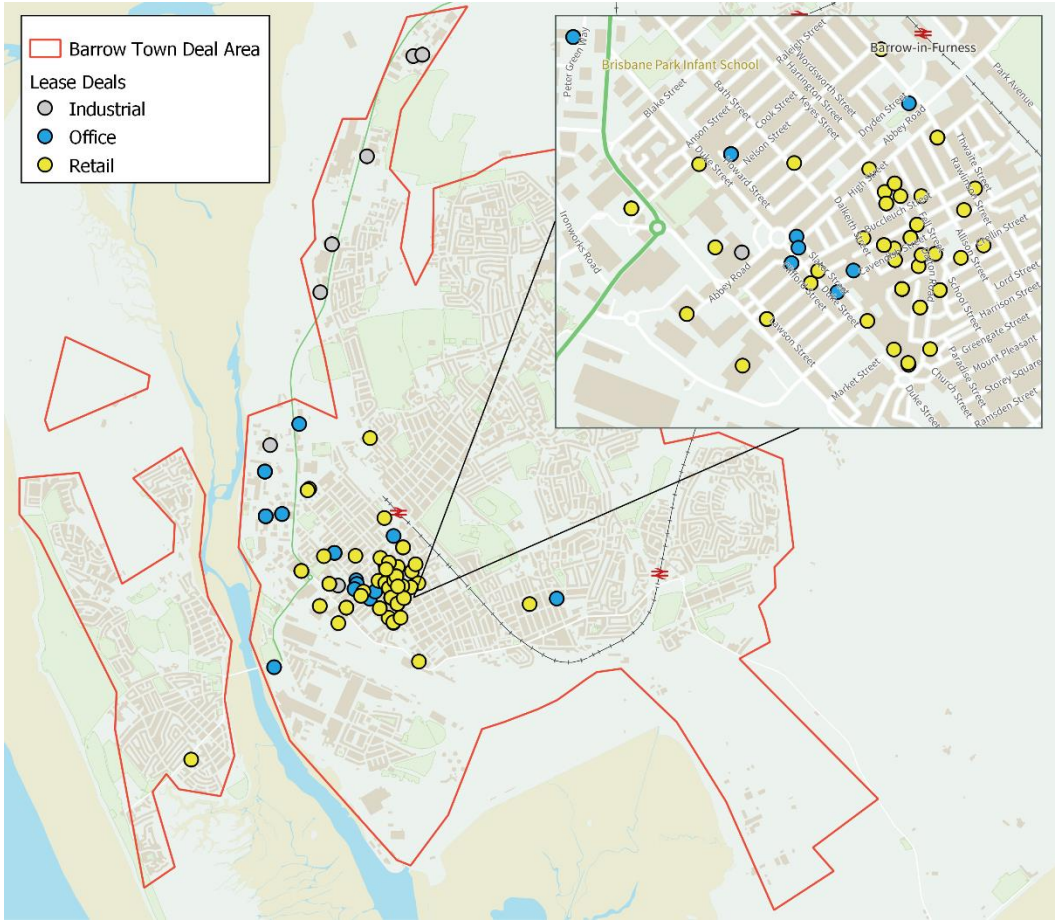
CoStar data suggests there have been a **total of six lease deals agreed across Barrow in the last 12 months**, with the largest being Aldi supermarket at Hollywood Retail Park. There has also been a new lease agreed for the New Look store on Portland Walk however, whilst it has been signed, this lease will not take effect until 2021.

There are currently **no retail units under construction** and the **existing stock is rated between 2-3 stars**, with only two 4-star units**, indicating low quality stock overall**.

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The Commercial Challenge
Demand



The majority (61%) of commercial lease deals in Barrow since 1990 have been in the Retail sector. Office leases have composed 32% of total deals, whilst Industrial leases make up the final 6%.

In terms of square footage leased since 1990, the Retail sector asserts itself again, accounting for 79% of total square footage leased. Conversely relative to the number of deals, the Industrial sector accounts for more square footage leased (12%) than the Office sector (9%).

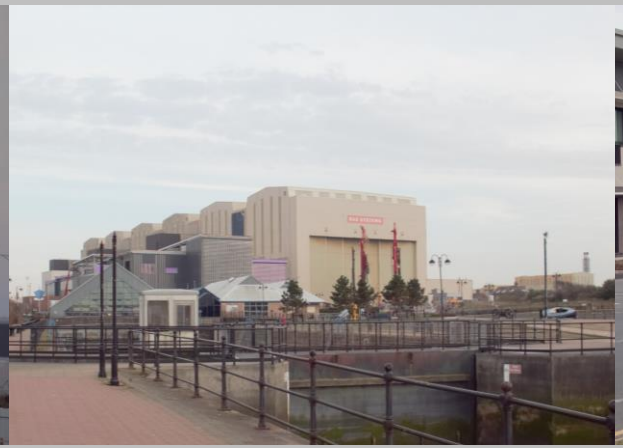
Lease terms vary considerably by time within and across sectors. Retail leases consist in a wide range of years between 1 – 30. The most frequent lease term is between 11-20 years, accounting for 27% of retail leases. On the other hand, Office leases are split almost evenly (51%/49%) between 1-4 and 5-10 years. Industrial leases are the fewest of all sectors (8 in total since 1990) – 3 of these are for less than 5 years, a further 3 are between 5 and 10 years, and 2 are for 15 years.

As stated within the ESPS, there is consistent demand for industrial and office stock within Barrow however, these enquiries are often for smaller, more modern employment spaces which the current market does not offer.

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Opportunities for Growth







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Summary Implications – Opportunities for Growth

There is a real sense of momentum in Barrow and a new way of collaborative working with key stakeholders in the town which will realise optimum impact for the town.

Barrow has the opportunity to capitalise on major projects which will drive economic growth in the town. Crucially, Barrow needs to deliver benefits to local people through a focus on driving an inclusive economy. Opportunities include:

+ Maximising the economic and social impact of BAE Systems as an anchor institution and major investor
+ Proactive targeting of opportunities presented for further growth as a result of the Crown Estates Round 4 Offshore Wind Leasing
+ The delivery of new housing including bringing forward Marina Village, with the potential to create a new vibrant neighbourhood with an aspirational housing offer to change perceptions
+ Further occupation and development of Waterfront Business Park, to retain and grow existing businesses in the town
+ Building on the Further Education offer of the town through an enhanced technical and higher education offering
+ Maximising strategic infrastructure assets such as the Port of Barrow to drive growth in advanced manufacturing and clean growth opportunity sectors, as well as opportunities to support the visitor economy

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Maintaining Momentum

Recent investments in Barrow are starting to shift perceptions of the town as a place to live, work, visit and invest. These include:

- Modernisation and refurbishment of Barrow Central Library - £1.2m
- Upgrade of North Road and associated junctions to improve capacity to the town centre - £6m
- Dock Museum Investment - £78,000 on the installation of new play equipment
- NHS investment in Alfred Barrow Health Centre - £14m opened in November 2019 and provides a new primary care centre enabling the integration of community, primary and social services.
- Holiday Inn Express Investment - £12.85m hotel (217 beds) opened in 2020
- Craven House - £440,000 since 2015
- The recently secured Arts Council £2.26m Creative People & Places funding will support the implementation of the emerging ‘Barra Culture’ programme over the next 4 years

There are also series of major opportunities which will drive future growth in Barrow.





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Maximising the Economic & Social Impact of BAE Systems

Between 2017 to the early 2030s, the Dreadnought Submarine programme will benefit from an injection of £4.2bn GVA. Barrow needs to capitalise on this opportunity by offering an appropriate range of shops, services, homes, workspaces and amenities to attract and retain workers and spend.

The ‘contribution of BAE Systems to the UK economy’ report identified that BAE Systems’ operations in Barrow spent £40m on procuring a total of 91 suppliers in 2018.

For BAE Systems expenditure as a whole (£3.7bn), the largest category of procurement spending included payments made to major subcontractors for large components for capital projects such as building Royal Navy vessels (including submarines). The sectors with the largest indirect GVA impacts are manufacturing and professional services.

The wages paid to BAE Systems’ employees, contractors and employees in the UK supply chain provide a further stimulus through consumer spending. The largest effect is in the real estate sector, followed by the retail sector. BAE are planning to recruit 900 staff over the course of 2020 including 50 graduates, 350 apprentices and around 500 experienced workers for higher-level roles.



Wider benefits included investment in R&D (£90m spent in 2018), capital spending (£244m in 2018) including the £25m ASK in Barrow, refurbishment of the main manufacturing facility including a new 28,000 sqm logistics facility and a new central yard complex with two new major buildings; and generation of export value.

BAE are developing a major masterplan to support the operation of their site. This has the potential to improve the character of Barrow’s waterfront through the development of a new campus incorporating office and learning provision.

Copyright © Hatch 2018. All Rights Reserved. Source: Oxford Economics, The contribution of BAE Systems to the UK Economy, September 2019; FHSF bid, Annex 10 – Summary of Wider Investment in the Town

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Delivering Clean Growth

Barrow plays a key role in contributing towards the UK's clean growth challenge. Namely, the renewable energy company Ørsted has its Operations & Maintenance (O&M) support base at the Port of Barrow, servicing:

+ The **Barrow Offshore Windfarm** has been in operation since 2006 and delivers electricity to the National Grid. With a capacity of 90 MW, it can generate power for circa 80,000 homes. The windfarm has boosted the local economy by supporting the local supply chain and creating jobs locally.

+ **Walney 1 and 2** have been in operation since 2012 and has a capacity of 367 MW, which means enough power for 320,000+ UK homes can be generated.

+ **West of Duddon Sands** has been in operation since 2014 and has a capacity of 389MW.

+ The **Walney Extension Offshore Windfarm** was inaugurated in 2018. The windfarm uses technologically advanced turbines. With a 659 MW capacity, it can provide power for nearly 600,000 homes.

Ørsted's multi-million investment has contributed to the transformation of the Port of Barrow. The long term impacts of this investment are estimated to amount to 12,100 jobs and £781 million in GVA annually.

Looking ahead, Barrow has an opportunity to secure further investment in the Round 4 of the Crown Estate's Offshore Wind Leasing.

Source: Ørsted (Website)

Barrow Offshore Windfarm



Walney Offshore Windfarm



Walney Extension Offshore Windfarm



Advanced Manufacturing

Barrow is at the forefront of advanced manufacturing activity in Cumbria. The town delivers manufacturing excellence in shipbuilding, submarine and sub-sea technology. In addition to the servicing and supply chain opportunities linked to the £40bn Dreadnought programme, there is an identified opportunity to develop a new Advanced Manufacturing Innovation district. Barrow needs to be responsive to drivers of change to maintain its competitive position, including:

- Industrial digitalisation and automation
- Decarbonisation and energy efficiency
- Advanced materials and additive manufacturing

Case Study: Safeguarding Jobs at Kimberly-Clark

Kimberly-Clark is one of Barrow's major employers. The site manufactures tissue products, including Andrex and Kleenex, and employs approximately 400 people. An £85m investment has been secured to install state-of-the-art technology to drive manufacturing efficiency and long-term sustainable growth for the company, thereby safeguarding jobs.

The investment will enable Kimberly-Clark to improve production, make operations more efficient and will strengthen innovation capabilities.



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Town Centre Regeneration

The Future High Street Funding bid seeks to:

"*Harness Barrow's urban historic character and waterfront to create a vibrant centre for work, shopping, living and entertainment. Supporting our residents, employees and visitors from the local area, South Cumbria and beyond*"



The FHSF bid seeks to deliver a high quality and high impact scheme focused around the key assets of the Town Hall and Market Hall to transform Barrow from a functional centre into an exciting destination. The scheme will:

- Change the perceptions of the town
- Leverage inward investment
- Attract more and a wider range of visitors

The FHSF bid comprises of four integrated projects to reinvigorate the high street in Barrow, including a modernised market hall, the transformation of Barrow Town Hall as a visitor attraction and public service hub, a new Barrow Town Square to create footfall, and a Central Transit Hub to connect people to the town centre.

These proposals will breathe new life into the high street and capitalise on the spend opportunity presented by the investment into the town through the Dreadnought programme, by ensuring Barrow as the appropriate range of homes, workspaces, shops, services and amenities to attract and retain these workers.

In addition, there is a funding bid for a Heritage Action Zone on Duke Street which will, alongside the Stronger Towns Fund, will support the realisation of the vision for the town centre.

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Marina Village

The Marina Village proposal seeks to deliver between 450 and 600 new homes on a 12 ha site south of Salthouse Road in Barrow, between Buccleuch and Cavendish Dock. It is envisaged as a new vibrant neighbourhood, alongside a mix of uses in an attractive waterfront location.

The original proposal also explored potential for a marina at the site.

£1.8m was invested in junction improvements and public realm at Marina Village in 2018. Funding has also been earmarked to prepare the site for development. An updated Development Framework aspires to begin development by mid-2021.

Marina Village is subject to a Homes England LAAC funding application, and site preparation work and study are undergoing development.

The site offers the potential to significantly enhance the existing housing offer in Barrow, support town centre regeneration, and alongside BAE's proposals for the waterfront, will transform the character of Buccleuch Dock.





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The Waterfront Business Park

The Waterfront Business Park is strategically located adjacent to the Port of Barrow, in close proximity to BAE Systems and a cluster of Operations & Maintenance activity led by Orsted, Scottish Power, Vattenfall, Spirit Energy and International Nuclear Services.

Phase 1 of the Waterfront Business Park was completed in 2017 with a 300,000 sqft logistics facility owned by BAE Systems. The Business Park has serviced development plots ranging from 0.66ha to 4.66ha.

A new 16,000 sq ft new managed business centre ‘Waterfront Gateway Managed Business Centre’ is due to open in early 2020 offering up to 28 office suites, operated by Barrow Borough Council.







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Investing in Skills – BAE Systems

BAE Systems opened an Academy for Skills and Knowledge (ASK) in Barrow in November 2018. The academy represented a £25m investment by BAE Systems to develop the engineering skills needed to deliver the Royal Navy Submarine programme. The ASK is a vital part of BAE Systems programme to upskill and maintain the workforce to build the state-of-the-art submarines.

The ASK includes classrooms, workshops, scale models of submarine units, and a virtual reality suite. More than 1,500 BAE Systems employees are expected to use the Barrow ASK each month, including the 700 apprentices.

In addition, BAE Systems is supporting investment in education through sponsoring Furness Academy with a view to inspiring the next generation of the local workforce. BAE also collaborate closely with Furness College, with the relationship between the college and company recognised by Ofsted, leading to Grade 1 Outstanding judgement in Engineering for Furness College.

Discussions are also ongoing with the University of Cumbria to enhance collaboration with BAE Systems.



BAE SYSTEMS
INSPIRED WORK

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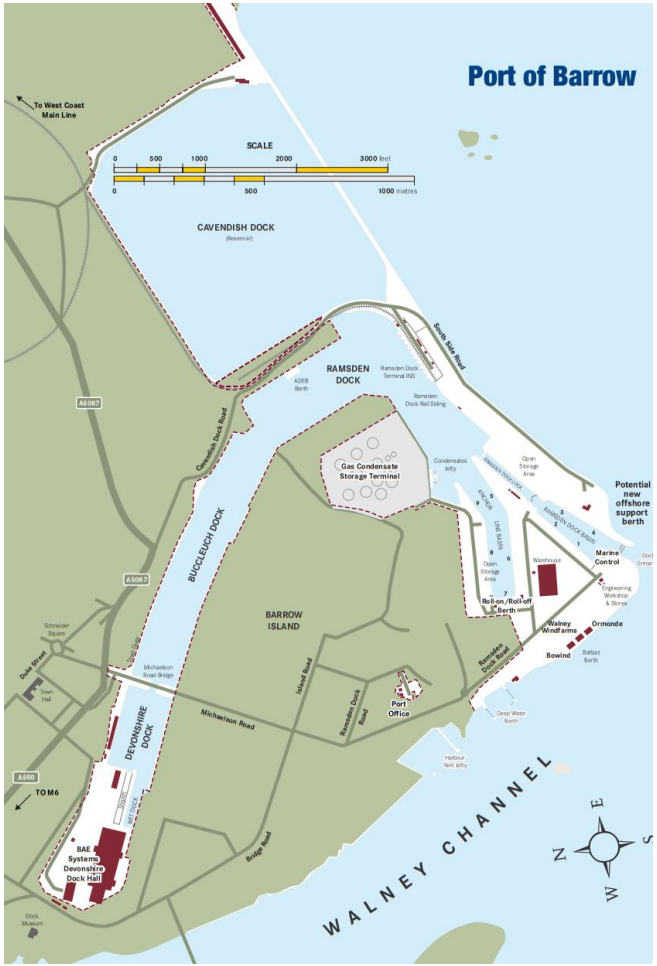
Maximising Strategic Infrastructure Assets

The Port of Barrow is owned by ABP and handled 167,000 tonnes of traffic in 2017. The port serves the offshore windfarm industry, and the nuclear submarine building programme. It also handles dry bulks (e.g. wood pulp and aggregates) and liquid bulks (condensate, the liquid by-product of gas production).

The Port is the closest port to the Walney offshore wind farm, and provides a base to four O&M bases supporting renewable energy generation in the Irish Sea. The port is a nuclear licensed port and serves Cumbria's global nuclear offer. The port also has a berth to accommodate cruise vessels up to 160m in length, providing a gateway to the Lake District.

According to a recent study*, the Port of Barrow contributes £107m to the UK economy, including £89m to the town of Barrow, and supports 1,200 jobs across the UK. Looking ahead, the study estimates the Port could grow its annual contribution to the UK economy by £30m, taking its total annual contribution to £137m.

ABP are working with Cumbria LEP to identify scope for involvement in a Cumbria Free Port proposal which Barrow could be part of.



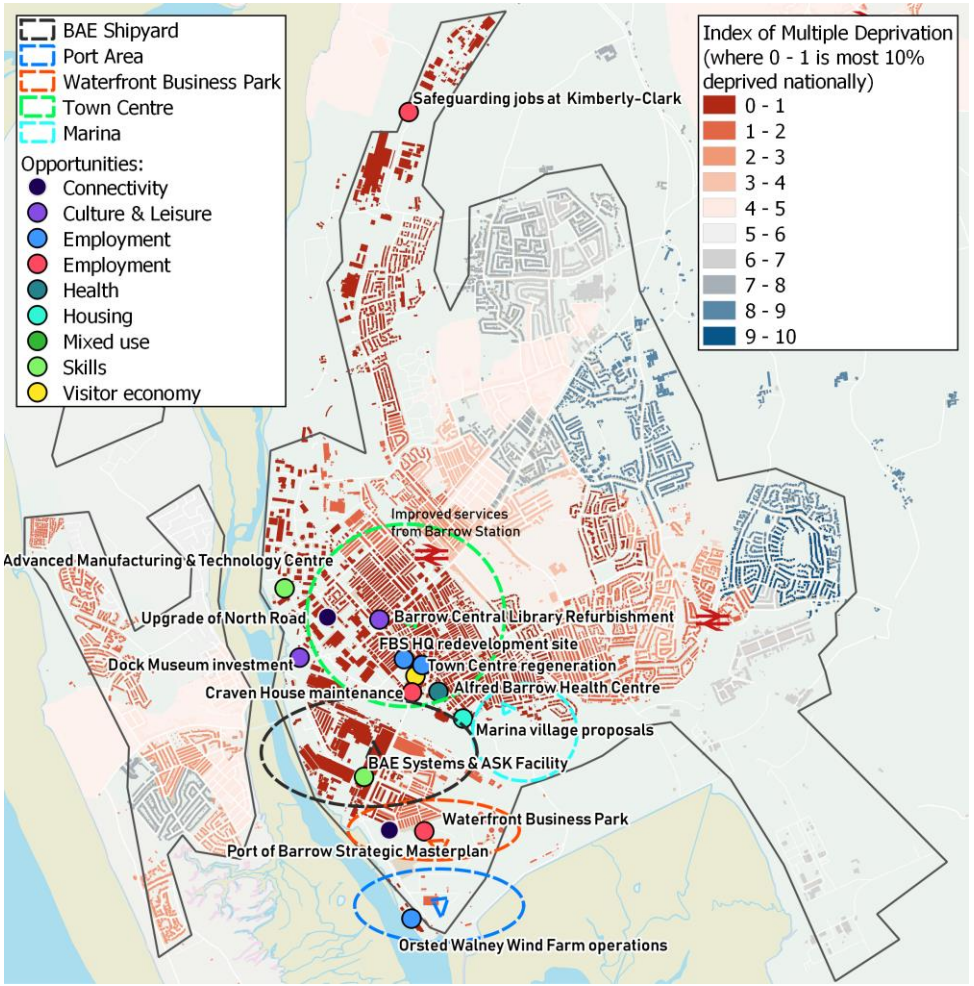
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*www.portstrategy.com

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Marrying Need and Opportunity

Overlaying recent and proposed investments with the Index of Multiple Deprivation identifies the proximity of opportunities for growth with the areas of significant deprivation. Areas of opportunity are focused around the waterfront and town centre, and align strongly with the concentrations of deprivation found in parts of the Town Centre, Hindpool, Ormsgill, Barrow Island and Abbotsmead.

The Town Deal provides an opportunity to empower disadvantaged communities to access opportunities, skills and services and contribute to the economic success of the town. The golden thread of an inclusive economy will be fundamental to the success of the Barrow Town Deal by ensuring that everyone has the ability to participate and share in the benefits of growth in the town.



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Strategic Implications







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Thematic SWOT – Urban Regeneration, Planning and Land Use

*Five Defining...***Strengths**

1. Natural capital including proximity to the waterfront, surrounding rural areas, and gateway to the Lake District National Park
2. Availability of brownfield land for redevelopment i.e. Marina Village and Barrow Waterfront Business Park
3. Local cultural assets such as the Dock Museum, Furness Abbey
4. Strength of local identity and community
5. Public sector assets to lever for economic growth

*Five Defining...***Weaknesses**

1. Perception of Barrow deterring investment and spend in the town's housing offer and town centre
2. Prevalence of low income and workless households limiting disposable income
3. Weak housing markets in some areas, and a lack of quality housing and employment sites to attract and retain investment
4. Complex remediation requirements of brownfield land requiring large scale investment to unlock potential
5. Viability gaps inhibiting investment to meet demand

*Five Defining...***Opportunities**

1. Major development sites including Marina Village (housing) and Barrow Waterfront Business Park (employment)
2. Opportunity presented by initiatives such as Future High Street, Heritage Action Zone and Town Deal to drive investment in regeneration
3. Private sector investment plans led by industry primes (BAE Systems)
4. Proximity to natural resources facilitating growth in the energy sector (wind, gas, tidal etc)
5. Geographical proximity of areas of need and opportunity to facilitate good growth outcomes

***Five Defining...*Threats**

1. Climate change and flood resilience
2. Government spending decisions including those related to defence and energy
3. Impact of Brexit, including on those export-oriented manufacturing businesses in Barrow
4. Population projections forecasting a fall in population, impacting on the demand for products and services
5. Ageing of the population impacting on housing needs, health and social care

Thematic SWOT – Skills and Enterprise Infrastructure

*Five Defining...***Strengths**

1. Growing economy generating £1.53bn per annum and home to 33,000 jobs
2. Export oriented economy driven by exports in machinery and transport
3. Sectoral strengths in Barrow including high value manufacturing and energy sectors, in addition to foundation sectors such as retail, public admin, education and health
4. Strong intermediate skills base and associated investment in technical and vocational provision
5. Improving education offer, continued investment in Further Education provision and employer-led career inspiration activity

*Five Defining...***Weaknesses**

1. Highly productive economy but the benefits are not spread equally with stark inequalities exhibited amongst the residential population
2. Dependence on large employers leaving the economy vulnerable to external decision-making
3. A low entrepreneurial culture and below average innovation activity
4. Under-representation of higher level occupations and skills; and above average representation of lower level occupations at most risk of automation and digitalisation
5. Deep-rooted inequalities which limit life chances, health and prosperity

*Five Defining...***Opportunities**

1. Potential to enhance higher education provision in Barrow to attract and retain young people to the town
2. Securing investment in opportunity sectors including advanced manufacturing and energy and driving competitiveness through digitalisation, upskilling and innovation
3. Delivery of new employment sites and premises, including managed workspace to support new business starts
4. Secure inclusive growth through initiatives such as the Towns Deal to ensure the benefits of economic growth are equally distributed
5. Levering anchor institutions and the role of public procurement in driving good growth outcomes

*Five Defining...***Threats**

1. Macro economic factors including the uncertainties created by EU exit, public sector spending decisions, and the impact of COVID-19
2. Demographic change is contributing to an ageing population in Barrow and a forecast decline in the working age population is anticipated, tightening labour supply and placing pressure on services
3. Skill shortages and gaps undermining competitiveness of employers
4. A net out-flow of young people to access higher education who may not return
5. Technology and innovation are disruptive forces which Barrow need to embrace to maintain competitiveness

Thematic SWOT – Connectivity

*Five Defining...***Strengths**

1. Proximity of Barrow to a deep water port
2. Serviced by two rail lines including the Furness Line to Manchester Airport and connections to WCML at Lancaster, in addition to the Cumbrian Coastal railway
3. Walney Airfield, owned and operated by BAE Systems
4. Active travel patterns by the local workforce supporting sustainability and well-being
5. Favourable broadband connectivity

*Five Defining...***Weaknesses**

1. Peripherality of Barrow, with a drive time of almost an hour to reach the M6
2. Poor rail connectivity, with a limited number of services and slow speeds given lack of electrification
3. Distance from nearby cities detracts from Barrow's ability to strengthen economic links and secure trickle down benefits
4. Limited access to Full Fibre broadband
5. Average 4G mobile coverage although this is an improving picture

*Five Defining...***Opportunities**

1. Enhanced place proposition to drive growth through proximity to the LDNP and rich heritage and environmental offer
2. Local transport investments will deliver greater reliability and resilience to support economic growth and create jobs
3. The Port of Barrow Strategic Masterplan will facilitate growth in the advanced manufacturing and energy sector
4. Active travel investment will support health and well-being objectives
5. Electrification of the transport system will lower operating costs and mitigate environmental impacts

***Five Defining...*Threats**

1. The environmental impact of transport on air pollution and C02 emissions
2. The resilience and reliability of road networks into Barrow undermine the ability of the town to secure inward investment
3. Digital infrastructure needs to keep pace to maintain Barrow's competitiveness
4. Infrastructure constraints will impact on Barrow's ability to secure investment and enable equitable access to economic opportunities
5. Deficient transport systems can contribute to missed opportunities, a lower quality of life, and increased costs for business undermining competitiveness

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Summary Conclusions

The following conclusions of the Socio-Economic Narrative have shaped the choices of the Strategic Objectives for the Town Investment Plan. These are:

- Barrow has significant sector strengths in advanced manufacturing and energy which will drive productivity and earnings growth. Barrow needs to ensure it has a supportive business environment in place to facilitate growth and maximise opportunity
- Barrow is highly dependent on a small number of major employers, and there is a need to support diversification and resilience in the economy. These employers have a role to play in facilitating economic and social value in Barrow as anchor institutions in the town
- Barrow has a number of key investment sites centred around the town centre and Barrow Island. Together, these present clear opportunities to lever significant inward investment to the town and anchor further regeneration.
- Barrow faces a significant demographic challenge and needs to retain and attract talent to fulfil the potential of major projects in the town and drive competitiveness
- Barrow has a higher skills gap which is a barrier to local people accessing the jobs of the future
- There is a net outflow of young people from Barrow, and this needs to be stemmed through strengthened progression pathways to education and employment within the town
- Barrow has stark levels of deprivation and inequalities which undermine quality of life and life chances
- Peripherality is a defining feature of the Barrow Travel to Work Area. Opportunities to enhance transport infrastructure and embrace digital technologies will help to offset this barrier to growth
- Barrow has an affordable housing offer but the condition of stock is a concern, and the lack of aspirational housing is a barrier to attracting higher skilled people to live in the town
- Barrow has a struggling town centre characterised by high vacancy rates and a leakage of spend outwith the area. Barrow needs to drive vitality and diversify uses in the town centre to attract people into the area
- The complexity of need and opportunity in Barrow requires a collaborative response by public services to drive transformation and inclusive growth in the town

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Draft Strategic Objectives

The contents of this research report validate the draft strategic objectives put forward by the Plan Development Group, as follows:

10 Strategic Objectives	Is the objective validated by the evidence?
To build on our strengths to help Barrow become a centre of excellence and innovation for advanced manufacturing and clean growth	**Yes:** clusters of activity as shown by employment, businesses and GVA. Manufacturing accounts for 30% of employment and has an LQ of 3.82. Energy production accounts for approximately 1% of employment with an LQ of 1.76.
To create a resilient local economy through greater diversification, enhanced competitiveness and providing a wider range of quality employment opportunities	**Yes:** there are five large employers' accounting for 12,100 employees in the town (43% of all BTD jobs). The foundational economy in Barrow is a major employer but the productivity gap between the town and the national average is pronounced. Self-employment levels are half that of the national average and business birth rates are over a third below the national average.
To grow the working age population by creating an attractive and vibrant place to live, work and visit	**Yes:** Barrow is depopulating (-1% since 2013) and is forecast to continue to decline driven by falls in younger and working age cohorts. There is a net out-flow of those aged below 24 from the town.
To equip people with the skills and confidence to achieve their potential to take full advantage of opportunities	**Yes:** There is a 16-percentage point gap between the occupations of BTD residents and the Barrow workforce, indicating that higher level talent is having to be imported into the area.
To strengthen progression pathways through a dynamic and integrated approach to school, further and higher education	**Yes:** Young people in Barrow need to be filled with confidence and a sense of opportunity to drive a pipeline of future talent. The number of school leavers progressing to HE is much lower than it should be and higher-level skills are markedly under-represented with only 25% of the BTD area possessing NVQ L4+ qualifications

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Draft Strategic Objectives

The contents of this research report validate the draft strategic objectives put forward by the Plan Development Group, as follows:

10 Strategic Objectives	Is the objective validated by the evidence?
To reduce deprivation and improve the physical and mental health and well-being of our community	**Yes:** 30% of LSOAs in the BTD are within the 10% most deprived LSOAs nationally; income deprivation affecting children is stark with 28% of LSOAs amongst the 10% most deprived nationally; 5th most deprived district for health deprivation & disability
To be a digitally connected and physically accessible town supporting walking, cycling and public transport	**Yes:** peripherality is a significant feature of the Barrow economy. There is a net inflow of people travelling into the town to access employment, particularly from South Lakeland and Copeland and active travel is a popular mode of travelling to work. Harnessing the power of digital technologies will ensure Barrow has the best infrastructure to stay ahead through generating business growth, fostering innovation and improving lives.
To deliver a more diverse and attractive housing offer while ensuring the continued renewal of our existing stock	**Yes:** median house prices are significantly below benchmarks. Barrow has good access to affordable housing, but the housing mix is limited (50% terrace) and there is a lack of high quality aspirational housing to attract and retain people.
To achieve a vibrant town centre, leisure and service offer supporting the role of Barrow as a regional centre while enhancing our rich built and cultural heritage	**Yes:** above average vacant units (14%) in the town centre*. Retail heart has been damaged by out-of-town shopping and rise of e-commerce, with major retailers earmarked for closure (M&S). Retail spend leakage is undermining the BTD potential.
To put residents at the centre of public service delivery	**Yes:** meet increased demand on local public services as a result of economic and housing growth and demographic change; improved service delivery around citizen needs.

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BARROW-IN-FURNESS TOWN DEAL BOARD	
Date of Meeting: 17th April 2020	
Reporting Officer: Place and Enterprise Manager – Cumbria CC	

Title: Draft Appraisal Framework and Strategic Narrative

Summary and Conclusions:

The Government will require that the Town Investment Plan is supported by a prioritised set of project proposals. To arrive at this position it will be important that a clear and transparent approach to scheme prioritisation is taken.

Central to this process would be the vision and objectives discussed for the Town Deal. These have been updated following feedback from the February meeting and are provided with this paper.

This report seeks the views of the Board on the development of the prioritisation framework and to set out key next steps in its development.

Recommendations:

It is recommended that the Town Deal Board:

1. Agree the draft Strategic Framework provided as Appendix A to this report.
2. Agree the approach to the prioritisation of proposals as set out within Appendix B to this report.

Report

Background

The development of the Town Investment Plan will need to take place on a staged basis, with the Government being clear that the development of the plan should be guided by a clear vision and objectives.

Recognising this at the February 28th meeting of the Town Deal Board feedback and broad agreement was received for a vision and objectives to support the subsequent development of plan. Following the completion of the draft socio-economic narrative these were subject to a further validation process. The vision currently stands as:

"To build on our economic strengths, rich industrial heritage, natural beauty and sense of community to develop a town that is economically dynamic and diverse, sitting at the forefront of innovation and green growth, viewed as a great place to live, study, work and visit and home to a healthy population that can deliver a prosperous, inclusive and fair future"

Alongside the vision the updated objectives are:

1. *To build on our strengths to help Barrow become a centre of excellence and innovation for advanced manufacturing and clean growth;*
2. *To create a resilient local economy through greater diversification, enhanced competitiveness and providing a wider range of quality employment opportunities;*
3. *To grow the working age population by creating an attractive and vibrant place to live, work and visit;*
4. *To equip people with the skills and confidence to achieve their potential to take full advantage of opportunities;*
5. *To strengthen progression pathways through a dynamic and integrated approach to school, further and higher education;*
6. *To reduce deprivation and improve the physical and mental health and well-being of our community;*
7. *To be a digitally connected and physically accessible town supporting walking, cycling and public transport;*
8. *To deliver a more diverse and attractive housing offer while ensuring the continued renewal of our existing stock;*
9. *To achieve a vibrant town centre, leisure and service offer supporting the role of Barrow as a regional centre while enhancing our rich built and cultural heritage; and*
10. *To put residents at the centre of public service delivery.*

The vision and objectives and evidential links to the Socio-economic narrative and underpinning their selection is set out within Appendix A to this report.

Prioritisation Framework

While a primary role of the Town Investment Plan will be to secure Town Deal Funding for Barrow, in shaping proposals it will seek to consider all major funding programmes across the town (private and public) in order to present a comprehensive approach for the use of Town Deal funding.

In establishing uses for Town Deal funding; the Government have been clear in their expectation that the development of the Town Investment Plan be supported by a prioritised set of interventions. To arrive at these it will be necessary to establish a clear assessment process.

Central to such a process would be the establishment of a prioritisation framework through which schemes can be considered and a set of recommendations presented to the Town Deal Board.

Appendix B to this report sets out the proposed approach to undertaking this work, setting out a consistent approach that can be applied to this, including options for weighing considerations.

The Town Deal Board are requested to consider these proposals and provide clear recommendations for how proposals may be most effectively moved forward.

End.

Appendix A – Draft Strategic Narrative
Appendix B – Draft Appraisal Framework

Appendix A - Draft Strategic Framework

A Draft Report by Hatch Regeneris
8 April 2020

Barrow Borough Council

Appendix A - Draft Strategic Framework

8 April 2020

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1. Draft Strategic Framework

Vision

1.1 The Barrow Town Development Plan Group discussed the draft vision at a meeting on the 17th of March 2020. This has been refined as follows:

> "To build on our economic strengths, rich industrial heritage, natural beauty and sense of community to develop a town that is economically dynamic and diverse, sitting at the forefront of innovation and green growth, viewed as a great place to live, study, work and visit and home to a healthy population that can deliver a prosperous, inclusive and fair future"

Strategic Objectives

1.2 The draft strategic objectives were discussed by the Plan Development Group and points for refinement noted. The following table summarises a revised set of Strategic Objectives for the Town Deal Board's consideration.

Table 1.1 Strategic Objectives – Draft Final		
10 Strategic Objectives	**10 Features of the Socio-Economic Narrative**	**Likely Output Categories[1]**
To build on our strengths to help Barrow become a centre of excellence and innovation for advanced manufacturing and clean growth	Clusters of activity as shown by employment, businesses and GVA. Manufacturing accounts for 30% of employment and has an LQ of 3.82. Energy production accounts for approximately 1% of employment with an LQ of 1.76.	• Improved productivity of key sectors (GVA per FTE) • New jobs created in key sectors (FTE) • Jobs safeguarded in key sectors (FTE) • No. of SMEs who are innovation active (i.e. cooperating with research establishments, developing new to market / new to firm products) • Renewable Energy production (MW) • No. of workers gaining NVQ L4+ qualifications
To create a resilient local economy through greater diversification, enhanced competitiveness and providing a wider range of quality employment opportunities	There are five large employers' accounting for 12,100 employees in the town (43% of all BTD jobs). The foundational economy in Barrow is a major employer but the productivity gap between the town and the national average is pronounced. Self-employment levels are half that of the national average and business birth rates are over a third below the national average.	• New jobs created (FTE) • Jobs safeguarded (FTE) • No. of SMEs assisted to grow (i.e. with 12 hours or more of support) • No. of new businesses started • Affordable workspace created or safeguarded
To grow the working age population by creating an attractive and vibrant place to live, work and visit	Barrow is depopulating (-1% since 2013) and is forecast to continue to decline driven by falls in younger and working age cohorts. There is a net out-flow of those aged below 24 from the town.	• Employment increase in key sectors • No. of visitors per annum • Increased footfall and spend (£) • No. of new residential units • No. of new residential units delivered on previously developed/brownfield sites • No. of residential units refurbished • Amount of commercial space created, improved or brought back into use (m2) • Employment land (ha) to come forward
To equip people with the skills and confidence to achieve their potential to take full advantage of opportunities	There is a 16-percentage point gap between the occupations of BTD residents and the Barrow workforce, indicating that higher level talent is having to be imported into the area.	• No. of learners progressing to Further Education • No. of learners progressing to Higher Education

[1] These output categories will need to align with MHCLG guidance when it comes available.

10 Strategic Objectives	10 Features of the Socio-Economic Narrative	Likely Output Categories[1]
		• No. of learners gaining NVQ L3+ qualification • No. of learners gaining NVQ L4+ qualification • No. of participants gaining employability skills (digital, soft skills such as leadership, teamwork, communication etc)
To strengthen progression pathways through a dynamic and integrated approach to school, further and higher education	Young people in Barrow need to be filled with confidence and a sense of opportunity to drive a pipeline of future talent. The number of school leavers progressing to HE is much lower than it should be and higher-level skills are markedly under-represented with only 25% of the BTD area possessing NVQ L4+ qualifications	• No. of learners progressing to Further Education • No. of learners progressing to Higher Education • No. of learners gaining NVQ L3+ qualification or equivalent • No. of learners gaining NVQ L4+ qualification or equivalent • No. of apprenticeship starts • No. of participants gaining employability skills (digital, soft skills such as leadership, teamwork, communication etc) • No. of work experience/mentoring/apprenticeship opportunities created
To reduce deprivation and improve the physical and mental health and well-being of our community	30% of LSOAs in the BTD are within the 10% most deprived LSOAs nationally; income deprivation affecting children is stark with 28% of LSOAs amongst the 10% most deprived nationally; 5th most deprived district for health deprivation & disability	• No. of children with improved educational outcomes (KS2, KS4) • Local jobs created/sustained within Barrow • Jobs created/sustained offering secure employment • Improved blue/green infrastructure i.e. Tonnes of CO2 savings; quantity (m2) of publicly accessible green space by type e.g. children's play space, outdoor sport facilities etc • Investment in culture/leisure assets (£)
To be a digitally connected and physically accessible town supporting walking, cycling and public transport	Peripherality is a significant feature of the Barrow economy. There is a net inflow of people travelling into the town to access employment, particularly from South Lakeland and Copeland and active travel is a popular mode of travelling to work. Harnessing the	• No. of premises with access to Superfast/Ultrafast broadband • No. of residents with 4G/5G coverage • Km of cycleways/walkways

10 Strategic Objectives	10 Features of the Socio-Economic Narrative	Likely Output Categories[1]
	power of digital technologies will ensure Barrow has the best infrastructure to stay ahead through generating business growth, fostering innovation and improving lives.	• No. of additional active travel infrastructure e.g. cycle hubs, cycle storage • Improved air quality linked to public transport • Reduced carbon from supply chain transport movements
To deliver a more diverse and attractive housing offer while ensuring the continued renewal of our existing stock	Median house prices are significantly below benchmarks. Barrow has good access to affordable housing, but the housing mix is limited (50% terrace) and there is a lack of high quality aspirational housing to attract and retain people.	• No. of residential units linked to identified gaps (type and tenure) • No. of residential units delivered on previously developed/brownfield sites
To achieve a vibrant town centre, leisure and service offer supporting the role of Barrow as a regional centre while enhancing our rich built and cultural heritage	Above average vacant units (14%) in the town centre*. Retail heart has been damaged by out-of-town shopping and rise of e-commerce, with major retailers earmarked for closure (M&S). Retail spend leakage is undermining the BTD potential.	• Increased footfall and spend (£) • No. of events/activities • No. of vacant units brought back into use • No. of businesses started in retail/leisure/culture • Size of night-time economy (businesses, licenses, visitors)
To put residents at the centre of public service delivery	Meet increased demand on local public services as a result of economic and housing growth and demographic change; improved service delivery around citizen needs.	• Increase in user satisfaction • No. of partners working together to support delivery • No. new partners engaged • Additional funding levered • To discuss: release land for new homes; savings in running costs; deliver integrated services for local communities



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Appendix B - Prioritisation Framework for the Barrow Town Investment Plan

A Report by Hatch Regeneris
8 April 2020

Barrow Borough Council

Appendix B - Prioritisation Framework for the Barrow Town Investment Plan

8 April 2020

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1. Proposed Prioritisation Framework

Purpose of this Note

1.1 In the coming weeks a series of project proposals will be assembled for possible inclusion in the Barrow Town Investment Plan.

1.2 The Board will need to make transparent choices on the suite of projects it wishes to include as priorities for investment.

1.3 The next few months are a crucial period for you to develop strong project proposals and delivery capacity to move ahead at pace. MHCLG will assess your Town Investment Plan and, if successful, Barrow will secure a Heads of Terms Town Deal which includes an allocated budget and identified projects which you can proceed with, and key conditions to take this forward.

1.4 After securing a Head of Terms you will need to develop the agreed projects through Full Business Cases and set in place delivery arrangements.

1.5 In summary, you need **good quality project proposals** at the heart of the Investment Plan to ensure you get issued with a Heads of Terms quickly.

Prioritisation Steps

1.6 We set out below suggested steps in the prioritisation of projects, with suggested timelines for each step:

1) Continue Expanding the Long List – complete by 24th April

2) Collate Project Concept Forms for Review – complete by 24th April

3) Clarification queries with project lead - complete by 1st May

4) Assessment against agreed set of Critical Success Factors - complete by 8th May

5) Sensitivity Testing against weighted factors - complete by 8th May

6) Prioritisation Recommendations / Decisions - complete by 15th May.

Critical Success Factors

1.7 The Town Plan Development Group discussed the draft Critical Success Factors (CSF) against which the success of the Town Investment Plan will be judged, and additional suggestions were considered. The revised list of 7 CSFs is as follows:

- Fit with the 10 Strategic Objectives [see Appendix A]
- The degree of transformative impact
- Clear evidence of clear market failure/market need
- Extent to which it delivers higher productivity
- Extent to which it secures inclusive growth
- Deliverability within TIP time frame (April 2021-March 2026)
- Financial sustainability beyond the Stronger Towns Fund investment

Question for Board: Do you agree with the PDG on the seven CSFs that will be used to filter and prioritise projects?

Developing the Long List

1.8 The Plan Development Group has been developing a long list of potential projects which respond to identified need and opportunity in Barrow. This process is iterative and is informed by the evidence of need as outlined in the draft Socio-Economic Narrative and continued stakeholder engagement.

1.9 The long list itself will have some status in the final Town Investment Plan to show the strength of the process you have been through. Ensuring a robust long list is therefore a vital step in the development of a compelling Town Investment Plan.

Making Choices

How Many Projects?

1.10 Once initial prioritisation of the long list has occurred, we will need to ask the Board to take some key decisions on the number of projects that will anchor the Town Investment Plan. These decisions will be influenced by several factors including:

- The Board's view of the relative importance of the Critical Success Factors i.e. transformational impact may lend itself to a smaller number of headline projects, whilst inclusive impact may lend itself to a larger number of projects
- The scaleability of projects to respond to multiple Critical Success Factors which may facilitate packaging of smaller projects
- The potential of projects to secure alternative sources of funding. This will be a key consideration as the Town Deal will not be able to deliver everything and the focus will need to be on a clear case for intervention where there is an identifiable funding gap.

Weighted Choices?

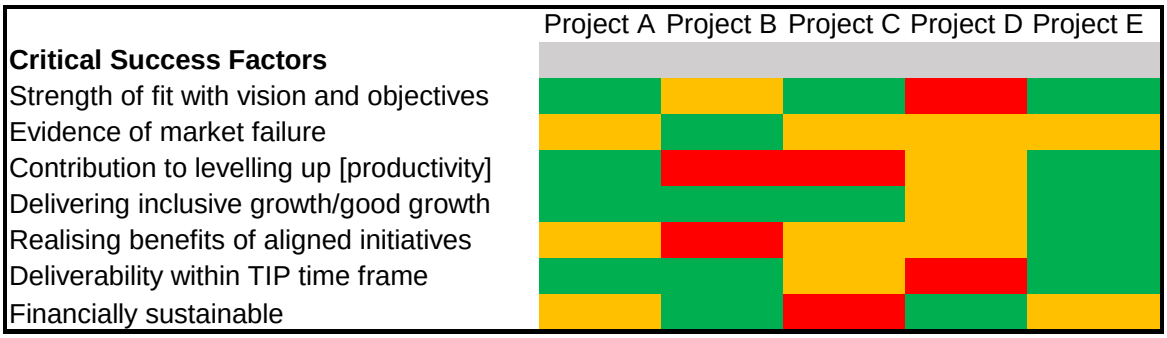
1.11 The Town Plan Development Group discussed scenarios by which the long list of projects can be prioritised. It is anticipated that approximately four scenarios will be run to inform prioritisation:

- Scenario 1: equal weighting given to all seven Critical Success Factors
- Scenarios 2-4: where selected Critical Success Factors are prioritised – say by boosting the importance of deliverability - and given a higher weighting. There is also the possibility that CSF1 (Fit with Objectives) could also be weighted so that fit with certain Strategic Objectives are given enhanced importance.

1.12 This approach will be quantified using the Long List in Microsoft Excel to generate different scenarios for consideration by the Board.

1.13 An illustrative example of how we would propose to score the projects is provided below.

Figure 1.1 Example Project Scoring Approach



Question for Board: Do you have strong views on enhanced weighting that should be given to particular strategic objectives or to particular critical success factors? If so, where should the emphasis lie and to what degree?

1.14 It would be very useful for the Board to give a steer on these matters at this juncture. There will of course be another opportunity for the Board to engage on this topic when we hold the actual short-list decision workshop scheduled for 15th May.

After the Priority Projects have been Selected

1.15 Once the priority projects are selected the PDG, with Hatch Regeneris, will work intensively to sharpen their focus and assemble all the necessary information and analysis required to make them **compelling projects**. This will include for each project:

- Strategic case for investment
- Powerful market failure case – a key requirement for MHCLG
- Financial profile
- Delivery and governance
- Impacts to be achieved and a persuasive Value for Money assessment.

Hatch Regeneris

8 April 2020



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BARROW-IN-FURNESS TOWN DEAL BOARD	
Date of Meeting: 17th April 2020	
Reporting Officer: Place and Enterprise Manager – Cumbria CC	

Title: Draft Prioritisation Framework

Summary and Conclusions:

This paper introduces the draft Long List of projects that are to be considered through the appraisal framework being prepared in support of the Town Investment Plan.

The board are asked to consider this list and advise on further additions they would wish to see considered.

Recommendations:

It is recommended that the Town Deal Board:

1. Consider and provide feedback on the draft long list noting any additional proposal they would wish to see considered within it.

Report

Background

During the February 28th meeting of the Town Deal Board, it was agreed that a long list of prospective Town Deal projects would be identified. Once identified these could be tested through the appraisal framework.

The development of the long list was over seen by the Plan Development Group and in so doing consideration was given to:

- The categories of proposals the Town Deal is eligible to support;
- Assessment of the objectives for the Town Deal;
- Historic schemes and concepts;
- New initiatives identified by the Plan Development Group and Town Deal Board members;
- Initial consideration of the deliverability of proposals;
- Early thoughts about the impact of COVID-19 on the local economy; and
- Consideration of feedback received through the #MyTown portal.

At present a total of 17 schemes have been defined and these are well balanced across the categories of investment defined by the Government:

- Connectivity: 3
- Skills and Business Environment: 7
- Urban regeneration: 7

Following the definition of schemes, officers are currently undertaking the preparation of concept forms that can be used to test proposals through a prioritisation framework.

It should be noted that not all proposals need to receive Town Deal funding to move forward and through the assessment process consideration would be given to alternative funding streams (e.g. Homes England funding) or specific, essential policy responses from Government. Consistent with this approach a wider review public and private opportunities will be incorporated as part of a holistic approach within the Town Investment Plan.

Members of the Town Deal board are requested to review the proposed list of projects and identify additional projects or programmes they would wish to see considered through the appraisal framework. Members are also asked to note where they have specific proposals, if they would wish to see if these can be accommodated within an existing long list proposal.

End.

Appendix A – Draft Project Long List

Project Name	**Project Location**	**Project Type** Urban regeneration, planning and land use/ Skills and Enterprise Infrastructure / Connectivity	**Short Description** 100 words max	**Developer of Concept Form**	**Prospective Value** £0-1m / £1 – 5m / £5-10m
Housing renewal programme	Barrow	Urban regeneration,	Barrow has a housing stock that includes a high proportion of pre-1919 terraced properties (40%). Much of this housing stock is in poor condition and is concentrated in the most deprived wards. It is proposed to develop a new housing market renewal programme focused on key areas of deprivation including Barrow Island, Walney and Hindpool/Central. This programme could include site refurbishment, redevelopment, public realm improvements, new homes together with complementary skill and training activity.	Barrow Borough Council	£1-5m
Town Centre Regeneration fund	Town wide	Urban regeneration	Programme of investment to support the regeneration of key building and development sites across Barrow, intended to ensure key heritage assets and prominent development and office sites are contributing fully to the economy of Barrow while maintaining economic vibrancy.	Barrow Borough Council	£1-5m
Walking and Cycling infrastructure	Town wide	Connectivity	It is proposed to deliver a comprehensive programme of walking and cycling improvements across Barrow-in-Furness. Measures need to be defined but are expected to include: • Segregated cycle ways; • Cycle hubs at key locations; • Upgraded off line walking and cycleways • Junction improvements in support of active travel measure	Cumbria County Council	£5-10m

			This programme could also see the introduction of a new walking and cycling bridge across Buccleuch Dock, linking the Marina Village Development Site with Barrow Island and BAE		
Community Wellbeing and Skills Hubs	Multiple Wellbeing and skills centres: • Ormsgill • Barrow Island • Walney • Hindpool/Central And 1 outdoor skills and activity site on Walney (Earnse Bay)	Skills and Enterprise	To establish / develop a network of four locally based community wellbeing and skills hub at the heart of communities where families of all ages throughout their life course can be supported to develop their skills, confidence, access services and employment pathways and come together to build thriving communities. These hubs would be used to run a range of programmes in partnership and where appropriate led by thirds sector organisations. This could directly support COVID-19 recovery among local communities and businesses. These individual centres will be reinforced by access to a new outdoor skills and recreation facility which will provide access for young people and many of the most vulnerable families to open spaces and outdoor education making use of the natural resources of Walney. This centre would also be able to support Barrow's wider visitor and leisure offer enhancing the opportunities for Walney to act as a destination.	Cumbria County Council	£1-5m
University Campus Development	Barrow	Skills and Enterprise	Creation of a new University Campus in Barrow this would support key sectors within Barrow, including energy and advanced manufacturing while also supporting the diversification of the economy and opportunities within it. More broadly this proposal should help to attract and retain more young people, enhancing education attainment and enhance the perception of Barrow.	University of Cumbria	£5-10m

Modernised Bus Network	Barrow	Connectivity	Transform Barrows bus offer, supporting the delivery of an electric / low carbon rolling stock to help de-carbonise the town centre, providing green transport options. Measures could include steps to decarbonise buses, improved bus infrastructure, including at junctions and bus stops. This will provide capacity to support critical growth, but to also ensure communities across the town can access services and opportunities without recourse to the private car. This proposal could link with current Future High Street Fund proposals and prospective Electric Bus Town Expression of Interest.	Cumbria County Council with support from BAE	£1-5m
Heat Exchange Network	Barrow	Urban Regeneration	Explore options for Heat Exchange Network linking major industrial sites providing energy (battery) storage and more efficient utilisation of energy. Excess could be used to provide low cost energy for either residents or SMEs.	Barrow Borough Council / Cumbria CC with support from BAE	£5-10m
See More	Barrow & Surroundings	Connectivity	Barrow element of wider Cumbrian See More campaign encouraging visits to tourist attractions outside the traditional honeypots.	Cumbria County Council	£0-1m
Business Support	Barrow	Skills and Enterprise	Provision of extended business support to boost growth, productivity and competitiveness – particular opportunities surround SMEs and with respect to account management, international investment, business start-up, diversification and early years of trading. This could directly support COVID-19 recovery among local businesses.	Barrow Borough Council with support from Growth Hub and CLEP	£0-1m

Tourism Attraction Development	Barrow	Urban Regeneration	Development of interventions to support tourism offer linked to industrial and maritime heritage and coastal attractiveness of Barrow and Walney. This would be supported by a programme of events and festivals.	Barrow Borough Council	£0-1m
Barrow Station	Barrow	Urban Regeneration	Improved public realm and bus facilities at Barrow Station. This to improve gateway and interchange role of the station. This would enhance perceptions and the connectivity of the station with wider town.	Cumbria County Council	£0-1m
Skills Hub	Town Centre	Skills and Enterprise	Creation of an Institute of Technology and a centre for level 3 provision for progression to Higher Education supporting an integrated approach to the provision of education across the town.	Furness College	£5-10m
Employment Sites Fund	Town Wide	Urban regeneration,	Proposals would see delivery of a new fund to support the delivery of employment sites, both within the town centre and allocated employment sites. This should support supply chain growth, emergence of professional services and with the potential to support development and refinement around one public estate.	Barrow Borough Council	£1-5m
Undergraduate summer holiday social action initiative and Trade Up	Barrow	Skills and Enterprise	The initiative will provide a six week summer holiday, paid social action programme for undergraduates currently based in universities around the country. This initiative will have the following objective; • Attract undergraduates (talent) who have left the area or from other areas, to the town to get involved in social action projects designed to improve the local area. The outcomes of the project will be; • Attraction of talent back / to the town	BAE	£0-1m

			• Increased sense of ownership / belonging of undergraduates to the town • Improvements in the local community through delivery of social action projects • Increase in skills of graduates To achieve an outward looking, inclusive and confident town positively perceived as a place to live, work and visit with more younger people choosing to stay in or move to Barrow Due to underrepresentation of women in trades and high demand for skills, the initiative will provide taster sessions for women, designed to introduce them to different trades (welding, steelwork, sheet metal etc). These sessions will take place in an evening, allowing those currently employed during the day to take part. Initial sessions could be held in FE colleges with longer-term courses provided within workplaces. This initiative will have the following objective; • Encourage more women to consider a career in trades. The outcomes of the project will be; • Increase in number of women applying / securing trade related roles / apprenticeships.		
Building the runway	Barrow	Skills and enterprise	This builds on the extensive work carried out in the Furness area to develop the skills, behaviours and aspirations of young people from key stage 1 to key stage 5. Whilst there is currently lots of work taking place with employers and schools this is not particularly aligned, underpinned by a	BAE with support from Furness Education and skills	£0-1m

			consistent approach or centrally monitored and evaluated (particularly at primary level) . The project will work with employers and schools to ensure there is a more streamlined and consistent approach, utilising the available resources in a more efficient and effective manner, with an emphasis on social mobility and equality and diversity.	partnership (FESP)	
Marina Village	Barrow	Urban regeneration,	The site will deliver a high quality housing scheme alongside leisure, retail, office and cultural development. The project would challenge perceptions of central Barrow encouraging people to live and work there. It would diversify the Borough's housing offer and will provide new employment and leisure opportunities whilst transforming a brownfield site within one of the most deprived wards in Cumbria. This proposal is currently subject to an LAAC Fund application.	Barrow Borough Council	£5-10m
Ultra Fast Broadband	Barrow	Skills and business environment	Programme to support the further delivery of ultra fast broadband to key locations and employment sites within Barrow, support the growth and diversification of supply chains and further opportunities.	Connecting Cumbria	£1-5m

BARROW-IN-FURNESS TOWN DEAL BOARD	
Date of Meeting: 17th April 2020	
Reporting Officer: Place and Enterprise Manager Cumbria CC	

Title: Town Investment Plan Programme

Summary and Conclusions:

The paper asks that the board note progress in the development of the Town Investment and key activities over the coming four weeks

Recommendations:

It is recommended that the Town Deal Board:

1. Note the interim programme and priority activity over the coming four weeks.

Report

Since January 2020 work as being ongoing to progress the development of our Town Investment Plan. This has seen governance arrangements being put in place, the town deal boundary being agreed, a vision and objectives progressed, economist support subject to a tender exercise and a draft communications strategy developed.

Notwithstanding this it should be noted that guidance on the timescales and processes in developing the plan has been somewhat scant. The Government recognise this and we have been advised that further guidance is considered imminent.

In early March encouragement was given for Barrow to pursue a May submission. However in light of the COVID-19 crisis these timescales we further reviewed and the conclusion was reached that the target should remain July, which is nonetheless ambitious.

Appendix A to this report contains the latest interim programme supporting the development of the town investment plan. It is intended that this will remain under review pending the receipt of further guidance from MHCLG.

Pending this further advice and mindful of the need to maintain momentum, over the next four weeks the following priority actions have been identified:

- Finalisation of the communications plan and further stakeholder engagement;
- Finalisation of the socio-economic narrative;
- Due diligence on concept projects;
- Appraisal of prospective projects;
- Development of Town Investment Plan Skeleton

At the May meeting of the Town Deal Board it is intended that the outputs and options emerging from these activities will be considered.

End.

Appendix A – Interim Town Investment Plan Programme

Appendix A - Work Programme

A Draft Report by Hatch Regeneris
9 April 2020

Appendix A - Work Programme

This report contains the expression of the professional opinion of Hatch Regeneris (the trading name of Hatch Associates UK). It is based upon information available at the time of its preparation. The quality of the information, conclusions and estimates contained in the report is consistent with the intended level of accuracy as set out in this report, as well as the circumstances and constraints under which this report was prepared.

The report was prepared for the sole and exclusive use of . Hatch Associates Limited shall only be liable to and is not liable to any third party who intends to rely on or has relied or is currently relying upon this report (in whole or part).

9 April 2020

1. Work Programme

Figure 1.1 Work Programme as of 10th April 2020

	Week beginning	13/04	20/04	27/04	04/05	11/05	18/05	25/05	01/06	08/06	15/06	22/06	29/06	06/07	13/07	20/07	27/07
	Draft Socio-Economic Narrative																
	Draft Appraisal Framework																
	Draft Project Long List																
	Receipt of Project Concepts																
	Finalisation of Communications Plan																
	Stakeholder and Social Media Engagement																
	Feedback and Due Dilligence of Project Concepts																
	Finalisation of Communications Plan																
	Appraisal of Concept Forms																
	Draft Options Appraisal Report																
	Town Investment Plan Skeleton Development																
	Town Deal Board Meeting																
	Focused Community Engagement																
	Draft Business Case Development for Short List Projects																
	Draft Economic Assessment Report for Town Investment Plan																
	Developing Draft Town Investment Plan																
	Preparation of Draft Communications Engagement Report																
	Town Deal Board Meeting																
	Finalisation of Business Cases for Short List Projects																
	Finalisation of Economic Assessment for Town Investment Plan																
	Finalisation of Communication and Engagement Report																
	Finalisation of Town Investment Plan																
	Town Deal Board Meeting																
	Town Investment Plan - Submission																
	Executive Summary document																

Key
Work in progress
Town Deal Board
Output
Plan Development
Scheme Development
Communications and Engagement



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