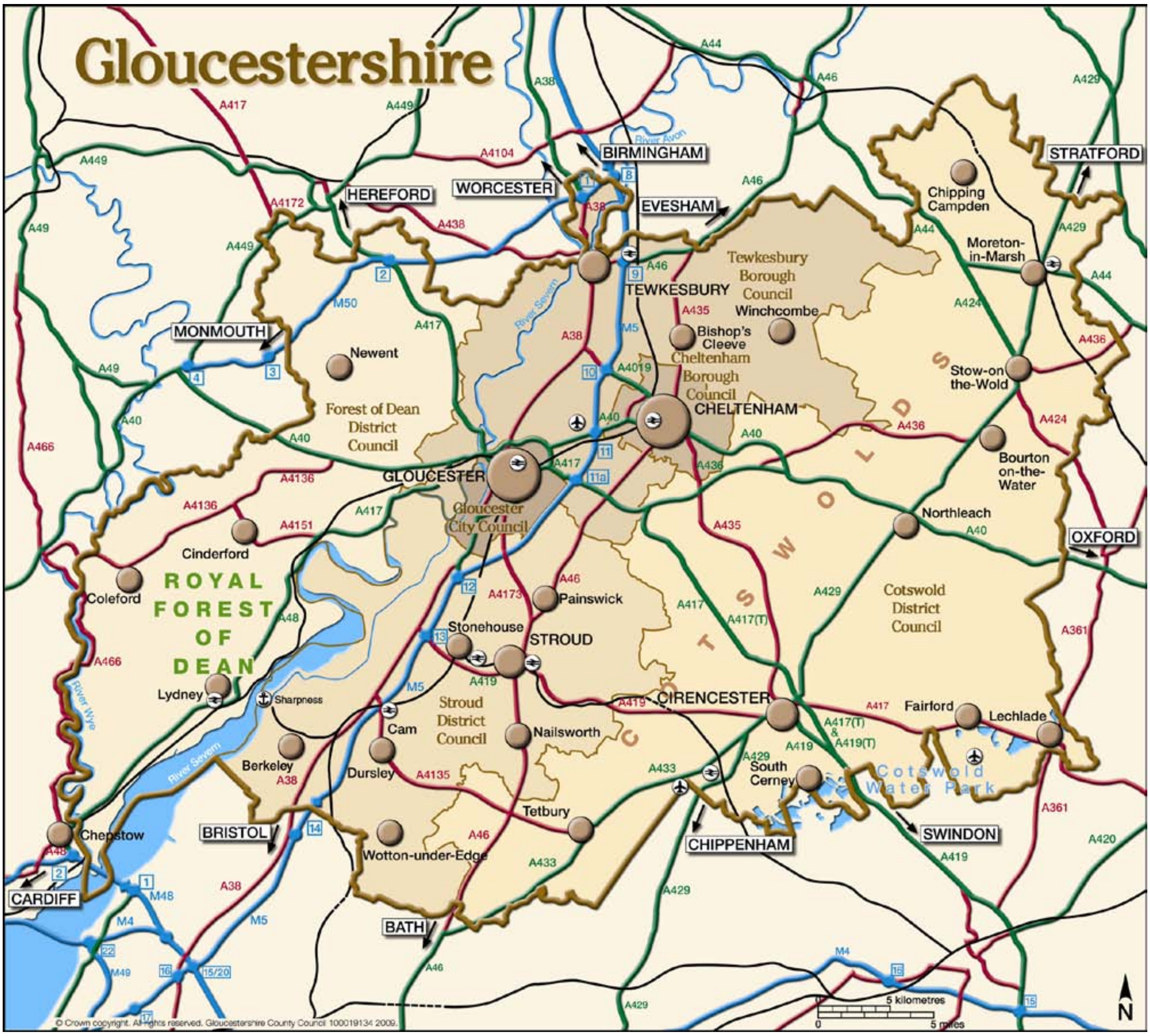
THE GLOUCESTERSHIRE INTEGRATED ECONOMIC STRATEGY

2009-2015

The County of Gloucestershire



Population – 582,600 (2007 mid year estimates); Total Employees in employment - 258,400 (ABI 2007); Employment in manufacturing – 39,200; Economically active population (working age people) - 291,800 (APS Jan 08 - Dec 08); Economic Activity Rate – 83%; Number unemployed 12,622 (claimant count June 09); Annual Gross Value Added £11.1bn (current basic prices 2006); GVA per head £19,172 (current basic prices 2006); Average weekly earnings – resident based (full time, gross, median) - £476 (ASHE 2008)

Purpose of the Strategy

1 The purpose of the Gloucestershire Economic Strategy 2009-2015 is to:

- Establish an ambitious vision for the Gloucestershire economy together with the key priorities that will deliver this vision.
- Provide a strategic framework to guide investment in the County's infrastructure and economy.
- Use and influence national policies and regional strategies and plans to the benefit of Gloucestershire.
- Provide the clarity to enable an effective Three Year Delivery Plan, revised annually, to be agreed and delivered by partners.
- Guide the development of Joint Strategic Commissioning Plan (JSCP) targets[1].
- Replace with a single economic strategy the previous Economic, Rural, Urban and Energy Strategies.

Mission

2 This is a mission led economic strategy and is:
"To create and foster in Gloucestershire a sustainable, low carbon economic environment in which businesses flourish, communities thrive, and individuals have the opportunity to reach their potential".

Background

3 Gloucestershire is a uniquely special place to live and work because the combination of its numerous assets sets it apart without the dominance of one single unique feature. These assets are more than terrific people, innovative businesses and breathtaking scenery. Gloucester and Cheltenham are significant urban conurbations, which provide key centres of employment and services; because they are only 9 miles apart they can combine, when appropriate, to take advantage of the attributes of a city region but there is no dominating metropolis. Gloucestershire is a county of distinct contrasting areas; the Cotswolds, world renowned limestone uplands with one of the lowest population densities in England; the Severn Vale, a rich alluvial plain, the economic heartland of the County, well populated and including many towns; and the Forest of Dean, an ancient oak forest and previous mining area, with many small communities and businesses. There is considerable diversity with no dominating economic sector. It is distinctively local but globally orientated; many of the businesses, large, medium and small trade globally enhancing the reputation of Gloucestershire world-wide. The County has 25 market towns each providing services, which have developed over generations, to provide jobs and services needed by the surrounding population. In summary Gloucestershire is a subtle and unique combination of urban and rural, a rural county with an urban heart.

4 This Strategy is one of three interrelated documents:

- The Economy of Gloucestershire, produced annually by the County Council, provides the evidence base; the latest version is The Economy of Gloucestershire 2009.
- This document, The Gloucestershire Economic Strategy 2009-2015, which sets out the Strategic Objectives and will be 'refreshed' every three years.
- The Delivery Plan, which will cover a rolling three years, and be produced annually to enable priorities to change during the lifetime of the Strategy.

[1] The five themes in the JSCP's are Safer & Stronger Communities, Healthier Communities and Older People, Children & Young People, Natural & Built Environment and Economic Development & Enterprise for which Gloucestershire First is responsible.

These documents will inform and be informed by the priorities identified in other regional and Gloucestershire strategies described in Annex A.

5 This Gloucestershire Economic Strategy 2009-2015 covers a period beginning with an extremely severe economic recession, combining a lack of credit with a crisis of confidence. When the recession ends the Gloucestershire economy needs to be well placed to take advantage of the recovery. This demands great flexibility, which it is intended, should be provided in two ways:

- The strategy will be 'refreshed' after three years, which will enable changes in the overall economic situation to be accommodated.
- The priorities in the Three Year Delivery Plan will be revised annually and will change and adapt to reflect the immediate situation. Initially the priority will be towards retaining jobs, creating new ones and enhancing skills, whilst at the same time ensuring that those sectors and businesses that are likely to lead us out of the recession are as strong as possible.

6 The economic needs of the County are covered under 8 themes each with a single strategic objective:

- A Gloucestershire Economy addresses the different economic needs of place, from the urban heart to the isolated rural community.
- A Competitive Economy identifies the shape and components of a future competitive and productive Gloucestershire economy and how to achieve this.
- A Connected Economy addresses the importance of good connectivity, physically and electronically, internally and globally to the future Gloucestershire economy.
- A Low Carbon Economy addresses both the need to reduce CO2 emissions and the opportunities that derive from it for the Gloucestershire economy.
- A Resilient Economy addresses the need for the Gloucestershire's economy to adapt to climate change and be more resilient to the risks from natural and economic events, accidents or malicious attacks
- A Skilled Economy addresses the need for the Gloucestershire working population to have the skills needed to make them as productive as possible fulfil their potential.
- A Sustainable Economy considers how to conserve and enhance the environment as a foundation for a sustainable economy.
- A Working Economy addresses the need for as many of the Gloucestershire population of a working age as possible to have a productive and satisfying job.

Economic Overview

7 The world economy is currently facing three significant problems – a liquidity crisis, with the resulting credit squeeze on economic growth; a recession with a sharp rise in unemployment and business failure and, in the longer term, the significance of climate change with its implications for economic development, particularly the need to move to a low carbon economy. How great the impact of the first two will be or how long they will last is a matter for conjecture but they are and will continue to affect the SW economy significantly for several years. The South West Regional Development Agency (SWRDA) is forecasting the impact on Gloucestershire in terms of the increase in unemployment and the reduction in Gross Added Value (GVA) will be more severe than in the rest of the South West. It is important to recognise that the end of the recession, signalled by an increase in Gross Domestic Product (GDP), will not mean an immediate fall in unemployment, which is likely to go on rising for many months, probably years.

8 The Economy of Gloucestershire 2009 is the detailed evidence base. Its key points are:

- The residential population of Gloucestershire was 578,600 in 2006 and is forecast to grow by 3.9% to 601,000 by 2016.

- The draft Regional Spatial Strategy (RSS) indicates that the highest levels of population growth will occur in the Districts of Cheltenham, Gloucester and Tewkesbury and proposes the development of 48,600 new dwellings (principally in these Districts) in the period 2006-2026 together with around 22,000 jobs and 118 hectares of employment land in the Gloucester and Cheltenham travel to work area by 2026. The draft RSS permits changes to the Green Belt and proposes development to the north of Gloucester and North West and South of Cheltenham.
- 279.700 (80%) of the working population are in employment[2]. In 2008 the average gross weekly wage was £476; slightly more than the UK (£479) and the South West (£451)
- Gloucestershire is geographically at a crossroads. It is the gateway to the South West from the Midlands and the north and one of the gateways to South Wales from the east; economically it has close links therefore to the West Midlands and to a lesser extent to the South East. It is well served by a good strategic road network and Network Rail will shortly be developing the Route Utilisation Strategy for the link between Birmingham and Bristol.

9 A recent SWRDA Quarterly Economic Review[3] reported that: "Competitiveness is one of the main drivers of business performance, productivity and wider economic activity. International trade and associated exploitation of regional comparative advantage is a fundamental component of competitiveness. South West England (SWE), however, has a particularly low propensity to trade. Although the region accounts for around 8% of UK economic output in 2007 it accounted for only 4.8% and 4.2% of UK goods export and imports respectively. However, against this background "the most competitive part of SW England was Cotswolds followed closely by Cheltenham, Tewkesbury and Stroud, which all have relative competitiveness above the UK average".

10 The economic crisis is global. Gloucestershire's future prosperity will depend to a large extent on its global competitiveness and a willingness to recognise that traditional sectors and business models may not be as competitive as new ones. In particular the need to address the threat of global warming and reduce carbon emissions is likely to dominate future decades. This economic strategy must provide the springboard for new ideas to be developed and implemented.

11 The economic crisis has highlighted a growing problem that society has become more dysfunctional. The desire for personal gain is having an adverse impact on family, the needs of society and communities and on the environment. There is a need to integrate the growth of the economy with the needs of society in a way that has not been achieved in recent decades.

Context

12 The Strategy needs to relate to relevant European, national, regional and county policies, which are referred to in the text. Brief details of these are at Annex A.

Gloucestershire First

13 This strategy cannot be delivered effectively by a single organisation; rather it is designed to be delivered by a partnership, Gloucestershire First. Gloucestershire First is the countywide economic partnership established to develop and support the economic well-being of the County. It brings together partners from the public, private and voluntary sector in the field of economic development, who meet quarterly, to contribute to an overall strategic plan for the county. It is balanced and fairly

[2] APS Jan-Dec 2008
[3] Economic Review, Issue 14, Fourth Quarter: November 2008 South West RDA

represented. It has a small permanent staff, which includes the County Council Economic Development Unit; as such is unique in the region. These staff manage the programmes and initiatives for both the Regional Development Agency and the partnership. A list of the current Gloucestershire First partners is at Annex B.

Theme 1 - A Gloucestershire Economy

14 The three aims of the Gloucestershire Conference Sustainable Community Strategy 2008-2017 are: "A place where the future matters; a place where communities matter; a place where everyone matters". 'A Gloucestershire Economy' addresses the different needs of place, from the urban heart to the isolated rural community and examines how the uniqueness of Gloucestershire as a whole can be retained and developed for future generations.

Strategic Objective

15 **To make Gloucestershire a place where the economy thrives in both the urban and rural areas and in all communities**.

The Economy of Gloucestershire 2009

16 Key points from the Economy of Gloucestershire 2009 relating to place are:

- Gloucestershire is the 13th most rural county in England; it borders six other counties and covers an area of 1,020 square miles.
- Gloucestershire has been a significant location for commerce since the Roman era, and its location at a crossroads of trade routes between Wales and London and the Midlands and South West continues to give it advantages as a business location today.
- Companies have been attracted here not by financial inducements, but by Gloucestershire's advantages as a location both for business and residence, the quality of life and the skills of a highly qualified workforce.

Discussion

17 Gloucestershire needs to be a place that is distinctive to the first time visitor and to stand out across the world to bring benefit to the economy. The challenge is how does the visitor, whether real or virtual, immediately recognise Gloucestershire for what it is; its commitment to the environment; its innovative capacity; its partnership between city, towns and rural; its connectivity; its conviviality; its children friendly nature; as a great place to live and work? Distinctiveness is about reputation not branding and everyone and everything has a part to play in making Gloucestershire 'stand out from the crowd'.

18 People choose the place to live, influenced by factors that can be grouped collectively as 'quality of life'. To attract the brightest and most innovative people, who are vital to creating and maintaining a prosperous economy, Gloucestershire must be a place, which offers a better quality of life than other urban or rural environments. The environmental factors that contribute to quality of life are discussed under 'A Sustainable Economy'. Others include: Excellent schools, colleges and universities; good health care and public services; easy to travel in - lack of congestion; good access to the rest of the UK and overseas; good leisure and cultural facilities, sports, restaurants, theatres, concerts, museums, etc; quality of shopping facilities; and, safe, with low levels of crime.

19 Gloucestershire has a significant number of excellent schools in both the private and the public sector, including grammar schools, but increasingly they need to be measured internationally. Universities and colleges provide a focus for clusters of

creative and innovative businesses and attract innovative individuals. Research has shown that neither the HE nor the FE sectors are meeting the needs of either the young people of the County or its businesses; plans are in place to change this; their implementation is crucial. Facilities in the FE Colleges have been substantially improved, making them among the best-equipped in the country.

20 Gloucestershire has a low level of crime and people's fear of crime is generally unrealistically high. However, the Index of Multiple Deprivation shows that the number of Super Output Areas[4] (SOAs) in the worst 10% nationally for crime and disorder in Gloucester and Cheltenham increased between 2004 and 2006 from 11 to 19.[5] It is important that this is addressed.

21 A good quality of life should embrace everyone and not be confined to particular places or parts of society. Gloucestershire has some very disadvantaged people, not just confined to the SOAs in the urban areas suffering the greatest deprivation, but also in rural pockets. Every effort needs to be made to: Maintain high quality public sector housing and provide additional properly funded housing where it is needed; ensure that the facilities, staff and results in schools in deprived areas are better than the current average standard in the County; provide effective, accessible medical care and dentistry; provide good, affordable public transport access to jobs, training and services. There is also the need to provide an increasingly aging population with the services and support they need.

22 Urban Gloucestershire, with a total population forecast by 2026 to be at least 370,800 is a significant urban conurbation, particularly in regional terms with, perhaps the potential to become a 'city/region'. Although Gloucester and Cheltenham perform different but complementary roles and face different economic challenges Gloucester/Cheltenham are one of the 'priority places' identified by the RDA in their Corporate Plan. It is essential that the County takes advantage of this to develop the economy of the urban heart of our rural county.

23 The proposal in the draft Regional Spatial Strategy (RSS) of 48,600 new dwellings principally in Gloucester, Cheltenham and Tewkesbury in the period 2006-2026 together with around 22,000 jobs and 118 hectares of employment land in the Gloucester and Cheltenham travel to work area by 2026 provides an opportunity for the County to demonstrate its ability to carry out major development for the 21st Century in an imaginative and exemplary manner.

24 The future vitality and viability of our market towns, which are centres of economic activity and provide essential services for the surrounding communities is critical and so also are the County's villages and hamlets, some of which are particularly isolated. For the purpose of this strategy it is assumed that an economically sustainable rural community: Has sufficient jobs of different types in or nearby (within five miles) to meet the employment needs of those living in the community; has, within a reasonable distance, viable services, retail and social (medical, school, etc) to meet the day-to-day needs of the community; has a range of housing, including affordable housing, to provide a balanced community and to make essential services viable.

25 An important element of distinctiveness is the quality of the public space, particularly in urban areas. It needs to impress and make people feel good. The public sector, from the SW RDA down to parish and town councils all have critical role to play in achieving this.

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[4] SOAs are smaller than District Council wards and contain 1,000-3,000 people. They are used in The Index of Multiple Deprivation, which measures income, employment, health deprivation & disability, education, skills and training deprivation, barriers to housing & services, crime and living environment.
[5] IMD 2007

26 The traditional approach to solving problems in a place is to focus on the needs of communities. However this often misses the opportunity to build on a community's strengths and resources, which may be more effective. This alternative approach, Asset Based Development, has worked in some rural communities as the Carnegie Foundation has shown[6]. This approach needs to be tested in Gloucestershire.

Delivery

27 The Gloucestershire First partners will make Gloucestershire a place where the economy thrives in all communities by:

- Working pro-actively to make Gloucestershire distinctive and providing a quality of life and business environment that attracts and retains talented business entrepreneurs, innovative and creative thinkers, and academics.
- Delivering initiatives so that the HE and FE sectors better meet the future needs of Gloucestershire businesses and young people.
- Growing the economy of Gloucester and Cheltenham, using the SWRDA of Gloucester/Cheltenham as a 'priority place' and the allocation of new housing and jobs, effectively.
- Providing the vision, leadership and resources necessary to reinvigorate the market towns and help villages to become more sustainable rural communities.
- Working with the appropriate authorities to reduce the incidence and impact of crime and disorder throughout Gloucestershire.
- Investigating how the principles of effectiveness of 'Asset Based Development' can be used to develop the economy of Gloucestershire as a whole.

Theme 2 - A Competitive Economy

28 "Competitiveness is one of the main drivers of business performance, productivity and wider economic activity. International trade and associated exploitation of regional comparative advantage is a fundamental component of competitiveness".[7] Although parts of Gloucestershire are more competitive than much of the rest of the Region (see paragraph 9) the County needs to be competitive globally not just regionally. A 'Competitive Economy' identifies what sectors will offer Gloucestershire a competitive and productive economy after the recession.

Strategic Objective

29 **To develop a more competitive and productive Gloucestershire economy by 2015 in terms of sectors and employment opportunities.**

The Economy of Gloucestershire 2009

30 Key points from the Economy of Gloucestershire 2009 relating to competitiveness are:

- Gloucestershire has a strong overall economy and is already an attractive inward investment location. Its key business sectors are: Advanced engineering, Construction, Creative industries, Distribution, Environmental technologies, Finance & business services, Food Supply, ICT, Leisure and Tourism. Other important sectors are: Care, Manufacturing, Public sector.
- 60% of Gloucestershire's business units are contained within two industrial sectors: 'Banking, finance and insurance' and 'Distribution, hotels and restaurants'.
- The majority of business units are small employers, with 71% of businesses in Gloucestershire employing 1-4 people (14% of employees). There are comparatively few large firms (0.5%) employing more than 200 people;

[6] 'Development Trust Associations transforming communities for good' CarnegieUK Trust
[7] SWRDA Quarterly Economic Survey November 2008

however they account for a significant proportion of (23%) of the County's employees.

Discussion

31 The key sectors in the Gloucestershire economy are always changing; the recession is likely to accelerate some of these changes. What will remain is a high skills base in the current sectors. It is therefore necessary to identify future growth sectors that suit the skills base and start developing these. At the same time Gloucestershire needs to retain a diverse economy, which has been one of its strengths.

32 Three sectors are certain to have increased importance, food and drink production, medical and environmental technology:

- In 2007 there was a world wide shortage of food; this situation is likely to return. The Environment, Food & Rural Affairs Select Committee has reported that food production will have to double by 2050 to meet the needs of a growing population.[8] The County needs to give a high priority to farming and food and drink processing, recognising the need to adapt to the demands of global warming.
- As the global population ages so the numbers requiring care will increase. Advances in medical techniques mean there is a need for medical equipment manufacturing and R & D, a sector the County must retain and develop.
- The challenge of global warming will dominate the world economy for decades. Gloucestershire has lagged behind the Region in the development of the environmental technology sector, a situation that must be reversed as the potential market is huge. The challenge is not necessarily the technology itself but finding ways of manufacture that are economic. A comprehensive plan to develop the sector is needed, which embraces education and potential manufacturers. Possible areas of development are parts for electric vehicles, the exploitation of photovoltaic cells, anaerobic digestion, geothermal heating, turbine blades for hydro electric schemes and wind turbines and valves for boilers.

33 Priority should be given to the other sectors which make up a 'knowledge economy':

- The Finance & Business Services Sector provided 14% of jobs in 2007. Although the sector is going through dramatic change it will remain important for Gloucestershire given the expertise in the current work force.
- Gloucestershire has a stronger manufacturing and advanced engineering sector than the average; in the future it needs to be able to compete globally even more effectively. This means putting a high priority on ensuring the retention of these sectors, the supply of new, innovative young engineers and of appropriate workspace; the education establishments must recognise the critical importance of engineering to our economy.
- The Public Sector, including Care, employed 26.9% of the Gloucestershire workforce in 2007. An important element of this is GCHQ. The County needs to continue to attract Government organisations.
- The move of the HQ of the Allied Rapid Reaction Corps (HQ ARRC)[9] to Innsworth in 2010 and the integration of its staff into the community should bring significant competitive benefits.
- The creative industries sector is one that offers the potential for significant economic growth nationally and locally but probably not until after the recession. The priority therefore is to ensure the retention of the sector as a base for future expansion.

[8] EFRA Report published 21 July 2009

[9] The HQ of the Allied Rapid Reaction Corps is a NATO HQ with staff from all the NATO countries.

34 The current reduction in activity in the construction sector will lead to a pent up demand after the recession, magnified by the need to reduce the carbon footprint of existing business units and homes. This means increasing sustainable construction techniques and skills and maintaining the stream of new entrants into the construction sector, despite the challenges. The opportunities to do this offered by the current major regeneration programmes and other developments need to be maximised.

35 There is a continuing need for appropriate employment land, with good communication links and workspace that encourages the creation of job opportunities. The recession will lower demand for workspace in the short term but this is an opportunity to upgrade it and so increase the provision of high quality workspace suitable for future businesses in the longer term.

36 Distribution, which includes wholesale & retail and hotels & restaurants, is the largest private sector with over 60,000 employees (23.5%) in 2006. This is a sector that is already suffering significant job losses although the opening of Gloucester Quays should absorb some of these and help to market the County as a retail destination.

37 Leisure and tourism makes a significant contribution to the economy of the County, employing 9.6% of the workforce; they act as a 'shop window' for inward investment. In the short term the recession will cause more UK residents to stay in the UK, the lower exchange rate may increase the number of overseas visitors and the local domestic market could grow. The sector will need to adapt, introduce more sustainable tourism and increase the quality of what is offered to take advantage of the opportunity and use it to achieve long term growth.

38 Micro businesses will remain a critical part of the economy: the SME sector traditionally is where the recovery starts. To retain current numbers will require new businesses to be helped to start up and flourish.

Delivery

39 The Gloucestershire First partners will deliver a more competitive and productive economy in the County by:

- Using RDP-E[10] and the Gloucestershire Food Vision to develop more sustainable food and drink production and processing in the County.
- Supporting initiatives to develop and nurture engineering aptitude in young people and retain a profitable manufacturing sector including using advanced engineering techniques and innovation to grow pro-actively the environmental technology sector.
- Ensuring the provision of readily available employment land and workspace for the future particularly linked to new housing developments.
- Maintaining and developing the construction and creative industries sectors for the future.
- Strengthening Gloucestershire's offer to tourists, visitors and businesses in support countywide tourism strategy.
- Using 'Solutions for Business' to support micro businesses and SMEs to start up, survive and grow.

Theme 3 - A Connected Economy

40 Good connectivity, both physical and electronic, is vital to exploiting Gloucestershire's location and delivering a strong and resilient economy, whilst reducing the carbon

[10] Rural Development Programme – England 2007-13, an EU programme aimed principally at land based businesses.

emissions. A Connected Economy addresses how the County can develop a high quality and energy efficient communications infrastructure with good linkages to the other regions, London and the rest of the world.

Strategic Objective

41 **To provide the connectivity that enables Gloucestershire to be a place where people and communities interact and connect whether locally, regionally or globally.**

The Economy of Gloucestershire 2009

42 The key points from the Economy of Gloucestershire 2009 relating to connectivity are: :

- The draft Regional Spatial Strategy (RSS) indicates that the highest levels of population growth will occur in the Districts of Cheltenham, Gloucester and Tewkesbury.
- Gloucestershire is well served by a good strategic road network.
- Network Rail will shortly be developing the Route Utilisation Strategy (RUS) for the SW identifying long-term investment priorities including the potential for new stations.
- The main efforts on rail freight will be the development of Sharpness Docks to bring it back into use.
- Recent trends have led to the loss of many rural services, and many rural wards in Gloucestershire have no community facilities for education, health, shops or daily bus service. People living in these areas are much more likely to be physically isolated from participating in the labour market.

Discussion

43 Within the County the connectivity challenges are to: exploit the potential of broadband to new businesses, particularly in rural locations and expand the markets of existing businesses; increase flexible and home working; provide integrated public transport that becomes the 'option of choice' for the majority of commuters; and increase the potential for safe cycling and walking for local journeys.

44 Rail services to other conurbations, particularly London, must enable and not hinder economic growth and reduce the need to travel by car; many business leaders identify the poor rail service to London as a disincentive to locating in Gloucestershire. Network Rail has agreed to re-double the North Cotswolds Line linking Moreton-in-Marsh with London, Oxford and Worcester. Whilst welcome this does not resolve the poor service from and to the urban heart of the County. Part of the solution lies in re-doubling the single line track between Kemble and Swindon. This has not been included in Network Rail's investment plan for 2009-14, although funding has been found for the detailed design work to progress in 2009-10. Gloucester does not lie on the main Bristol – Birmingham line so that the regular service on this line generally only stops at Cheltenham. There is a proposal under discussion to establish a Gloucester/Cheltenham Parkway station at Elmbridge Court, with fast connecting bus links to Cheltenham and Gloucester. There is an increasing opportunity to use the MOD facilities at Ashchurch for rail freight together with the siding at Lydney.

45 The County Council has agreed to fund the reopening of operations at Sharpness Docks.

46 The County has a well developed strategic road network, with high capacity inter-urban roads, and the M5 providing excellent links to the motorway network. There is a major bottleneck on the A417 between Nettleton Bottom and Crickley Hill, which is a cause of regular delays, increased carbon emissions and costs for businesses. There are environmental constraints in finding a solution but there is regional support for a £280M scheme to overcome this being included in the Highway's Agency national investment programme. Poor access to the Forest of Dean is also a disadvantage for many

businesses located there and opportunities for collaborative solutions should be explored with Monmouthshire Council.

47 Gloucestershire's Local Transport Plan for 2006-11 (LTP2) sets out the transport strategy for the County. The County Council is responsible for implementing LTP2 and preparing LTP3, to take effect from 2011. The current aim of the Council's bus strategy in is to achieve a network that offers a good quality and viable alternative to the car, but the service standards set for various areas (10 minute frequency services in Cheltenham and Gloucester, half-hourly in other urban areas, and hourly / two hourly services in rural areas) are proving challenging to deliver in a financially sustainable way and there is a need for better integration than currently exists. LTP2 also seeks to expand Park and Ride facilities for Cheltenham and Gloucester as a priority, as well as tackling congestion, improving the condition of the highway network, and improving air quality. Much of rural Gloucestershire is poorly served by public transport, and many communities have real difficulty in accessing services causing significant deprivation. LTP2 recognises the problem but makes no specific reference to the economy in rural areas; only 43% of rural households in the County are within a 13 minute walk of an hourly or better bus service. Innovative solutions to improving rural access need to be a priority within LTP3.

48 Gloucestershire Airport has a short runway but is home to air taxi and private jet facilities serving over 250 destinations, which help to attract inward investment and some high spending visitors. The majority of flights are for business, corporate and training purposes. Birmingham International Airport is accessible by the M5/M42 and rail, and Bristol International Airport has poor access by road but a good bus link from Bristol Temple Meads.

49 Global business networks will help Gloucestershire businesses compete. A number of overseas students are attracted to HE courses, particularly at The University of Gloucestershire and the Royal Agricultural College. The challenge is to maintain contact and develop ways in which Gloucestershire businesses can make use of these contacts. Consideration could be given to making some of these students Gloucestershire Ambassadors[11] every year.

50 ICT is a major contributor to the County’s prosperity. There are still pockets around the County with poor or no broadband service, which should be considered unacceptable; solutions need to be found, wireless should be promoted where suitable. Internet connectivity should be a factor in both the allocation and selection of suitable workspace. Planners, architects and builders need to take electronic connectivity into account when considering new building developments.

Delivery

51 The Gloucestershire First partners will improve the connectivity of the County by:

- Lobbying relentlessly for high quality rail and road links to London and the SE including the re-duelling of the line between Kemble and Swindon and removing the Nettleton Bottom bottleneck.
- Recognising the need to provide an attractive alternative to private car travel, commuting, as essential to developing a low carbon economy.
- Ensuring that LTP3 contains the right transport strategy to achieve a local transport infrastructure and integrated public transport services that are appropriate to the needs of a developing Gloucestershire and provides solutions to the road and rail capacity issues in the County, including the handling of freight.

[11] The Gloucestershire Ambassadors, administered by Gloucestershire First, are a wide ranging group of individuals committed to promoting the County in their own spheres of influence. They receive quarterly bulletins on the Gloucestershire Economy and regular e-mails on matters of interest. There is an annual dinner.

- Tackling the access deprivation in rural communities with innovative initiatives. Pressurising suppliers to ensure that County businesses are able to maximise the benefits of broadband and ICT.
- Capitalising on the presence of overseas students in the County by inviting the best to become Gloucestershire Ambassadors.

Theme 4 - A Low Carbon Economy

52 Climate change is taking place and may be happening faster than previously thought. After many years of discussion recent developments at international, national and regional level means that the context is changing rapidly; the UK is now committed to sourcing 15% of its energy from renewable sources by 2020, an increase in the share of renewables by almost a factor of seven from about 2.25% in 2008 in scarcely more than a decade. Action needs to start immediately, particularly as Government data indicates that business emissions in Gloucestershire are currently increasing by 6.3% annually so the scale of the challenge is huge[12.] A 'Low Carbon Economy' addresses how Gloucestershire might become an exemplary low carbon economy whilst taking advantage of the opportunities that derive from it.

Strategic Objective

53 **To develop an exemplary low carbon economy in Gloucestershire.**

The Economy of Gloucestershire 2009

54 Key points from The Economy of Gloucestershire 2009 relating to low carbon include:

- Business emissions of CO2 in Gloucestershire are increasing by 6.3% per annum.
- Waste disposal is a key environmental issue, with the County and district councils responsible for different aspects of waste disposal.
- Gloucestershire's rurality means that it has a high level of dependency on car use, with the 25th highest car ownership rate in England and Wales.
- In 2007 the total renewable energy capacity installed in Gloucestershire was 5.1MW, 4.27MW of this from landfill gas. The regional target for 2010 is 597MW.

Discussion

55 In July 2009 the Government published the 'UK Renewable Energy Strategy'[13.] It states: "The precise breakdown of the 2020 renewable energy target between technologies will depend on how investors respond to the incentives we put in place. However, our modelling suggests that renewables could provide more than 30% of our electricity (compared to around 5.5% today); more than two-thirds of that could come from on and offshore wind, but there could also be important contributions from hydro, sustainable bio-energy, marine sources and small-scale technologies. 12% of our heat could come from sustainable biomass, biogas, solar and heat pumps, supplying the equivalent of 4 million households with their current heating demands. And renewable sources could provide 10% of our road and rail transport energy." At the same time the Government published 'The UK Low Carbon Transition Plan'[14.] Some details to implement these strategies, such as the actual 'feed in tariffs' for those supplying electricity to the grid, will not be published until next year but should offer the opportunity for small scale projects. Gloucestershire needs to ready to take maximum advantage of these policies whist recognising that there will be risks that need to be managed in a 'carbon constrained economy'.

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[12] National Indicator 186 measures the CO2 emissions per Local Authority Area
[13] The UK Renewable Energy Strategy 2009 (DECC July 2009)
[14] The UK Low Carbon Transition Plan: National Strategy for Climate & Energy (DECC July 2009)

56 In the meantime there is scope for virtually immediate significant emission reductions from buildings through energy efficiency improvement and relatively minor changes in behaviour. Organisations, businesses and individuals need to be made aware of how they can save costs and emissions by becoming more resource efficient. This requires leadership by the public sector, which needs to be in the forefront of demonstrating what is possible, and enlightened businesses.

57 There is a huge and growing opportunity for innovation in the development of technologies that deliver zero carbon or carbon neutral systems economically and market these globally. The County has the advanced engineering and manufacturing talent to exploit these and needs to take maximum advantage of the RDA's commitment to: "Invest to unlock regional business opportunities in the environmental technology sector, focusing on sustainable energy and waste; invest in strategic projects that support the demonstration and deployment of emerging renewable energy technologies, and; invest in programmes that support the development of waste recovery technologies and the growth of regional waste markets".

58 Ensuring that the County has the right skills to make the transition to a low carbon economy is one of the significant challenges it faces. The HE and FE Sectors and businesses themselves need to recognise what is needed to drive the innovation and changes needed.

59 Further emission reduction from buildings will require the introduction of new technologies. Those that are 'zero-carbon' (they produce no CO_2 although their manufacture, transport, installation and maintenance generally will) currently available are:

- Heat pumps, which use the warmth stored in the ground. Air source and water source heat pumps can also be used but are not as efficient.
- Small hydro turbines used for generating electricity from running water; parts of Gloucestershire, particularly the Stroud valleys, have the potential to do this.
- Solar photovoltaic systems, which generate electricity from sunlight.
- Solar thermal panels designed to capture sunlight to produce hot water.
- Wind turbines, which can be onshore, offshore or small domestic turbines.
- Nuclear, which already produces a significant proportion of UK energy needs.

Making new buildings very low carbon is relatively straight forward. The greatest challenge will be to reduce by 80% the emissions from existing buildings, including the current housing stock, to meet the target. This suggests the urgent development of an installer's network with the expertise to retrofit the new technologies in a cost effective way; it will require strong support from the education sector.[15]

60 The County needs to develop its own energy production and this can be done partly through local renewable energy solutions but also by extracting energy from the Severn Estuary. Five different schemes are currently being considered. Only one, a barrage at Beachley, is in Gloucestershire. However a barrage could have a major impact on the local environment, with the loss of much of the existing intertidal habitat. Under EU law any loss of intertidal habitat has to be replaced.

61 Gloucestershire does not have a vehicle manufacturing base, but by developing and installing the infrastructure needed to support electric vehicles Gloucestershire could take the lead in their use.

62 'Carbon-neutral' technologies, where the CO_2 given off equals that taken out of the atmosphere whilst the material grew, that are currently available are:

[15] Hartpury and Stroud Colleges are already developing relevant courses.

- Anaerobic digestion of organic wastes such as farm slurry and food processing waste can generate heat and/or electricity from the bacterial degradation of the material.
- Biodiesel and bio-ethanol, produced from crops are currently generally blended with fossil fuels.
- Biomass Combined Heat and Power (CHP) plants use energy crops such as miscanthus, forestry waste or waste wood to produce electricity and heat.
- Biomass heating using wood stoves or room heaters often linked to back boilers for space heating and hot water. Pellet boilers with hoppers are fed automatically.

Biomass heating is relatively easy to install in existing homes. There is already one anaerobic digester in operation in the County at Kemble and Glos Woodfuels is already supplying 4 sites, including the National Star Centre, with woodchip and has plans to increase production to 10MW annually using much of the privately owned woodland that is currently under-managed[16]. Wood pellets are currently imported into the County.

63 In accordance with the waste hierarchy of reduce, re-use and recycle the priority should be to produce less waste. However what is left should increasingly be seen as a resource. A variety of technologies, including incineration, gasification and pyrolysis are used to extract energy from the waste stream. The resulting product is ash with a much lower volume than the original waste.

Delivery

64 The Gloucestershire First partners will deliver an exemplary low carbon economy in the County by:

- Establishing quickly a programme to make businesses and organisations aware of immediate cost and CO2 savings that are possible whilst developing the necessary expertise in the construction sector.
- Supporting businesses wishing to develop in the environmental technology sector and introducing a pro-active campaign to attract new business in the sector to Gloucestershire including the development of an environmental technology business park.
- Exploiting the opportunities that arise from the UK Renewable Energy Strategy including the energy extraction potential of the Severn Estuary, local and community based generation and initiatives that use wood fuel and waste as a resource for energy production
- Requiring local planning authorities to establish carbon zero or carbon neutral planning policies.
- Growing the necessary skills base rapidly across Gloucestershire.
- Encouraging the development of electric vehicle technology and infrastructure.

Theme 5 - A Resilient Economy

65 All parts of the world face the need to adapt to climate change; those that do so effectively will gain economic advantage. There are also risks that are natural events, major accidents or malicious attacks and those associated with global markets and financial changes. As was demonstrated in 2007 parts of Gloucestershire are particularly susceptible to flooding. A Resilient Economy addresses the need for the

[16] The Forestry Commission's Woodfuel Strategy for England_ launched in 2007 to bring an additional two million tonnes of wood into the market, annually, by 2020 focuses on the potential wood resource available in the 60% of English woodlands that are currently under-managed.

Gloucestershire economy to adapt to climate change and more resilient to the risks from natural and economic events, accidents or malicious attacks.

Strategic Objective

66 **To adapt the economy of Gloucestershire to climate change and its resilience to natural disasters, major accidents, malicious attacks and world or national economic crisis.**

The Economy of Gloucestershire 2009.

67 The key points from the Economy of Gloucestershire 2009 relating to a resilient economy are:

- Gloucestershire's industrial structure is largely made up of four broad sectors: Public Administration, education & health; Distribution, hotels and restaurants; Banking, finance & insurance and Manufacturing. The key economic sectors, which account for 54% of the total number of employees, are: Advanced engineering; Construction; Creative industries; Distribution; Environmental technologies; Finance & business services; Food Supply; ICT; Leisure and Tourism.
- Climate change has the potential to impact significantly on industrial sectors in Gloucestershire. Hotter and more extreme weather conditions are particularly likely to affect the Agriculture, Finance & business services and Tourism sectors.
- The County's landscape is likely to be altered by changes in weather conditions, with an increase in incidents of flooding.
- The instability resulting from climate change is likely to result in an increase in the cost of insurance and property depreciation in high risk areas.

Discussion

68 Climate change will affect everyone; individuals, businesses, charities and public authorities at all levels will need to adapt to minimise the negative consequences and take advantage of new opportunities that may be offered. Economic sectors that are likely to be most affected include agriculture and horticulture (different crops), forestry (faster growth), construction (different design), insurance (new products) and leisure and tourism (longer season). There may need to be changes in working practices such as the structure of the working day. There is an inevitable level of uncertainty but discussion about the potential options and climate change adaption policies needs to start as soon as possible[17].

69 The flooding of July and August 2007 had a major impact on the Gloucestershire economy, particularly for businesses in the Severn Vale. Had the Walham Electricity Switching Station in Gloucester been flooded it would have taken many months to repair. It is generally assumed that the effects of climate change mean that such events will become more common and Gloucestershire's resilience to flooding needs to be improved. The 92 recommendations in the Pitt Review[18] of the flooding need to be implemented and the draft Flood and Water Management Bill[19], which has now been published, will help this to happen.

70 Flooding is not the only natural event that may threaten the Gloucestershire economy.

- Drought and increased fire risk are also more likely and could damage rural areas and thus the tourist industry.

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[17] The Cotswold Conservation Board has already received a report addressing the likely impact on farming and forestry of climate change.
[18] The Pitt Review: Learning Lessons from the 2007 Floods (25 June 2008)
[19] Draft Flood and Water Management Bill (Defra - 21 April 2009)

- The world shortage of food in 2007 was principally caused by a combination of flooding and droughts in other parts of the world.
- If the predictions of a rise in sea level due to global warming prove to be correct then some communities and businesses in the Severn Vale may be at risk.
- Disease, both human and animal, can surprise us at any time. There is a continuous risk of a human pandemic. Meanwhile Foot and Mouth Disease, and other animal diseases are a threat to the livestock in the County, already suffering acutely from TB at a major cost to livestock farmers; the cull of cattle due to TB increased by 42% in 2008. The threat to bees from the varroa mite has serious implications for food production.

71 Other risks to the economy are:

- Major accidents although rare but will inevitably occur. Closure of the M5 for a protracted period would cause major disruption.
- Malicious attacks can be divided into those directed at specific targets and indiscriminate attacks directed at the public at large. Despite the efforts of the security services there remains the possibility of a successful attack on a crowded place, transport, or on critical infrastructure all of which could have significant economic impact.
- The financial situation in 2008 highlighted the vulnerability of much of the economy to a credit crisis and recession.

72 To ensure the Gloucestershire economy is as resilient as possible against these risks:

- All businesses need to understand the potential impacts of climate change on their business.
- All businesses and organisations need to have in place 'disaster recovery plans' and keep these under regular review.
- The County needs to ensure it retains a diverse economy and does not rely to too great an extent on any single sector.

73 There are at least 2,830 Third Sector Organisations in the County, of which nearly a third operate county wide[20]. Many of these play a vital role in an emergency, increasing the resilience of Gloucestershire; they need to be part of any recovery plan. In addition, in a recession, many of those made redundant turn to volunteering as a way of maintaining their skills, whilst they look for a new job.

Delivery

74 The Gloucestershire First partners will increase the resilience of the County by:

- Facilitating debates about adapting to climate change.
- Implementing the recommendations of the Pitt Review in the County as quickly as possible.
- Reviewing the energy security and the critical infrastructure of the County and developing solutions to increase its robustness.
- Ensuring the County is as well prepared as possible for the unexpected by persuading all organisations, particularly the public sector, and businesses to draw up realistic 'resilience and recovery plans' and keep these under regular review.
- Support initiatives through the RDP-E programme to improve the health and welfare of Gloucestershire livestock leading to a reduction in the economic impact of diseases for businesses and related supply chains whilst improving food security.
- Developing the role and effectiveness of the community response, particularly the 3rd Sector.

[20] "Everybody Counts – Mapping the Third Sector in Gloucestershire" 2007

Theme 6 - A Skilled Economy

75 Gloucestershire needs to be a place, which recognises that every single individual has talent and can develop; where people have aspirations and build knowledge through education and experience; that attracts and retains smart people and creates opportunities for skilled people to develop and apply what they know; and which recognises the value of its young people and retains them to grow the economy of the future. Only by achieving these aims will Gloucestershire have a more productive economy to compete in a global economy, and a better quality of life for its people. A Skilled Economy addresses this challenge.

Strategic Objective

76 **To maximise the potential of the people of Gloucestershire by developing skills and talent that ensure profitable employment in the 21st Century and enable them to take advantage of and contribute to the economic development of the county.**

The Economy of Gloucestershire 2009

77 The key points from The Economy of Gloucestershire 2009 relating to skills are:

- Gloucestershire's schools perform better than national averages in both GCSEs and A Levels and better than average in GCSEs in English and Maths. Just over half of Year 11 pupils achieve 5 or more GCSEs at grades A-C including English and Maths.
- Gloucestershire's success rates in Work Based Learning are higher than both the national and regional average. The trend is one of significantly improving success rates.
- Gloucestershire has a highly qualified workforce at levels 3 and above, compared to England, and is one of the best qualified areas of the SW; but it also has the highest proportion of the working age population with no qualifications at all in the region.
- Skills gaps appear to be widening in Gloucestershire and closing across England, in particular in Government Skills[21] and in advanced engineering and manufacturing skills.
- Gloucestershire's employers perform well in respect of those who formally assess skills gaps compared to the South West and England but less well with regard to the proportion of employees trained and the number of days training per employee.
- There has been an improvement in the percentage of employers with a training plan, percentage of employees trained in the last twelve months, percentage of employers who formally assess skills gaps and who asses the impact of training on employee performance.
- There has been a decline in the percentage of employers with a business plan, percentage of employees with an Annual Performance Review and the number of days training per employee.

Discussion

78 The statistics in paragraph 78 are principally a regional/national comparison; Gloucestershire needs to compete globally. The Leitch Review of Skills "Prosperity for all in the global economy – world class skills" reports on how far behind the UK is and will remain in this respect unless changes are made. The Review states: "For the UK to succeed in the global economy it must commit to world class skills. Achieving this will require new, shared action between Government, employers and individuals all taking increased responsibility...The Government must ensure a skills system that delivers

[21] Government Skills is the Sector Skills Council (SSC) for central government. Its purpose is to improve the delivery of public services by working with employers to reduce skills gaps.

economically valuable skills. Employers must exercise influence over a newly simplified system and increase their investment in skills, particularly for low skilled employees, who often do not benefit from training at present. Individuals must raise their sights, motivation and aspiration and invest in their own skills. Where skills were once **a** key lever for prosperity and fairness they are now increasingly **the** key lever. The UK can only achieve world class prosperity and fairness if it achieves world class skills."

79 Gloucestershire has many of the resources to provide the education and skills needed to be a successful economy; however a recent study[22] showed that these are not being used effectively and that Gloucestershire's economy is being damaged as a result. The two most worrying highlights of the report are that Gloucestershire is a net exporter of traditional HE students to Higher Education Institutions (HEIs) nationally with the majority never returning after completion; this means that the County lacks enough ambitious and innovative young graduates. This is reinforced by the perception among 6th Formers that Gloucestershire is not a good place to start their careers. 'Graduate Challenge' is an initiative developed, in reaction to the current recession, which enables employers to take on new graduates for four months at no cost. If successful it should become permanent.

80 Secondly, the study identified a mismatch between the nature and style of current provision and the county's employment profile and skills needs, resulting in a lack of connection between higher and further education with employers. Urgent action is needed to address this and The Higher Education Funding Council for England (HEFCE) has agreed funding to enable this to happen.

81 Gloucestershire has been successful in tackling the problem of 16-19 year olds who are not in training, employment or education, generally referred to as NEET. The numbers of those that are NEET are even dropping slightly in 2009.

82 A successful economy requires a workforce with relevant skills both for the immediate task and for the future, adaptable to the needs of an economy that competes globally. The workforce also needs the key skills (management, communication, team working, etc) and the practical skills that are generic to their employment, and managers with leadership and management skills. Despite years of effort and many initiatives there are still too many employers that are not committed to improving the skills of their total workforce.

83 Train to Gain is the LSC scheme to help businesses be successful. It offers free, impartial and independent advice to businesses, matches any training need identified with training providers, and sees that training delivered meets business needs. It aims to be responsive to business needs, particularly to deliver the training in a way that suits the business. Only training to enable employees to gain their first Level 2 qualification is free but there is also wage compensation for those with fewer than 50 employees and some funded programmes, such as Apprenticeships.

84 The average age of the population of Gloucestershire is increasing along with the health of older people, principally in the rural parts of the County. At the same time the number of migrant workers, particularly from Eastern Europe has increased dramatically although the current economic situation has reduced the flow and may lead to a net loss. In some cases they are filling critical gaps in industry, for example as highly qualified engineers in Gloucestershire's advanced engineering businesses. Both migrants and older people represent an economic resource, because of their experience.

[22] Mahoney, M. 2008, Gloucestershire Higher Education Study for HEFCE and SWRDA

Delivery

85 The Gloucestershire First partners will maximise the potential of the people of the County by:

- Developing and delivering initiatives starting in primary school to increase the aspiration in young people.
- Maintaining and, where possible, strengthening the current initiatives particularly in deprived areas, which have kept the number of 16-19 year olds who are NEET[23] in Gloucestershire low.
- Attracting new graduates to the key sectors in the Gloucestershire economy.
- Ensuring that Gloucestershire has Higher and Further Education provision that meets the needs of the County's employers.
- Developing an employer culture that recognises the value of constant skills improvement, and leads to a year on year rise in the numbers achieving each NVQ level.
- Encouraging and supporting people in the 'potential workforce', particularly those who are disadvantaged, to gain or improve their skills and contribute to the local economy.

Theme 7 - A Sustainable Economy

86 Sustainable development means much more than a cleaner environment or a low carbon economy; it requires a long term view of the economy, rather than short term fixes. To deliver a more sustainable economy we must make more efficient use of what we have got. The combined landscape and built environment in rural Gloucestershire is rightly recognised as being of exceptional quality and contributes significantly to the economy. The environment needs to be managed, sustained and protected so that it continues to deliver benefits to future generations, whilst at the same time enabling the economy to develop and flourish. A 'Sustainable Economy' addresses how to conserve and enhance the environment as a foundation for a sustainable economy.

Strategic Objective

87 To realise fully the economic potential of Gloucestershire's environment whilst conserving and enhancing its exceptional quality of the countryside as a foundation for a sustainable economy.

The Economy of Gloucestershire 2009

88 The key points in the Economy of Gloucestershire 2009 relating to the environment are:

- As a rural county, Gloucestershire benefits from a high quality natural environment. County is designated as An Area of Outstanding Natural Beauty (AONB).
- Agricultural land plays a key part in the Gloucestershire landscape, with holdings covering an area of 209,000 hectares (out of a total County area of 265,000 hectares).
- Gloucestershire contains a wide variety of wildlife, and houses three National Nature Reserves, 10 Local Nature Reserves and 122 Sites of Special Scientific Interest (SSSIs).
- Gloucestershire performs well in terms of biological and chemical river quality, with 98% of rivers classified as 'Good' or 'Fair'.

Discussion

89 Gloucestershire's landscape is diverse, ranging from limestone upland, through a river plain to the largest woodland area in the South West. This diversity is a product of both natural and human influence, and in many places locally distinctive towns and villages

[23] Not in Employment, Education or Training

are an inseparable and vital part of the whole. AONBs are about protection and not preservation; they would not exist unless there had been development over the years; this needs to continue to match changing economic, social circumstances and the potential impact of global warming.

90 The County's unique countryside plays a major role in attracting new business and investment because it is a pleasant place to both live and work. It is a key component in Gloucestershire's appeal to tourists, to micro-businesses and can play a role in the marketing of local agricultural products. Nevertheless Gloucestershire needs to strengthen its reputation as a 'green' environment and it must do so if it is to attract young people and deliver a high quality of life. It should emphasise waste recycling; street cleanliness; lack of congestion; good parks and open spaces, the preservation and enhancement of established and historic townscape; lower than average noise, air and light pollution balanced by the needs of a safe environment.

91 Protection of what makes Gloucestershire attractive and distinctive is therefore an act of economic prudence. However the management of much of the asset lies with farmers, landowners and the forestry sector, who need to be economically viable to do so. 80% of the funds available under the Rural Development Programme – England 2007-2013 (RDP-E) are allocated to the environment and it is vitally important that these are accessed and used effectively.

92 A basic premise of sustainability is that long-term damage to the ecological systems will undermine long-term economic growth. Rural areas and rural land management provide a vital role in the delivery of ecosystem services, which include provisioning e.g. food and drink, fibre and fuel; regulating e.g. water management, climate regulation and pest control; and cultural e.g. distinctive landscape and recreational opportunities. Protection of the natural environment in the widest sense is therefore a fundamental building block for sustainable economic growth.

93 The Planning System both protects the environment and enables appropriate development. Planning Policy Statement 7 (PPS 7) 'Sustainable Development in Rural Areas' has made planning more responsive to the economic needs of rural areas than was the case previously. However PPS 4 'Planning for Sustainable Economic Development', which will replace PPS 7, is being developed and sets out how planning bodies should, in the wider context of delivering sustainable development, positively plan for sustainable economic growth and respond to the challenges of the global economy, in their plan policies and planning decisions. Local Development Frameworks, which must encompass new housing and job allocations and the services to support them, are particularly important in the context of the draft Regional Spatial Strategy. A real pro-active effort is needed to produce these in close consultation with communities and businesses.

94 Given the high quality and diversity of the landscape environment there is a need for skills in its conservation. These range from traditional craft skills to advanced science-based environmental conservation skills. Their development is being led by the National Heritage Training Academy (South West) based in Gloucestershire.

95 An unexploited asset of the County's industrial heritage is the Thames - Severn Canal, derelict along most of its route. It is estimated that current restoration of the stretch from the Saul junction to the Brimscombe Basin will generate about 580 person years of work and open up areas currently neglected to regeneration as mixed housing, social and employment use, creating around 2000 jobs. Additional tourism should generate £2.7million and 85 jobs. In the longer term there is an opportunity to complete the restoration of the whole canal linking the river Severn to the river Thames.

96 Implementation of the new housing potentially required under the draft Regional Spatial Strategy provides the opportunity to create new developments that are exemplary, not simply in terms of sustainability and energy efficiency, but by creating attractive, cohesive communities co-located with employment opportunities, services and with good connectivity. This requires a master plan and design criteria that developers must meet.

Delivery

97 The Gloucestershire First partners will conserve and enhance the County's environment as a foundation for a sustainable economy by:

- Maintaining a viable agricultural (farming and forestry) sector, principally through RDP-E and the take up of funding for environmental schemes.
- Integrating land management and environment measures to protect the unique landscape.
- Ensuring new housing is developed to exemplary standards to achieve high quality living environments and genuinely sustainable communities.
- Developing and sustaining traditional skills and conservation expertise.
- Supporting the restoration of the Thames - Severn Canal.
- Drawing up Local Development Frameworks in consultation with businesses and communities.

Theme 8 - A Working Economy

98 Jobs are key to most people's self respect and morale and also enable them, themselves and their families to have a reasonable life style. Jobs for a high percentage of those of working age are also essential to a productive economy. However the country and the County are likely to face growing unemployment for at least the next 18 months. A Working Economy addresses the need for as many of the Gloucestershire population of a working age as possible to have a productive and satisfying job.

Strategic Objective

99 **To increase the proportion of high value productive jobs, particularly in the 'knowledge economy', in the long term, whilst minimising unemployment in the short term**.

The Economy of Gloucestershire 2009

100 The key points from The Economy of Gloucestershire 2009 relating to jobs are:

- Gloucestershire has higher economic activity rates than Great Britain as a whole; Gloucestershire's claimant count unemployment is approximately 88% of the national rate with the highest rates of unemployment concentrated in districts and wards of Gloucester and Cheltenham; Gloucestershire has lower levels of unemployment amongst the under 25s compared to the South West and Great Britain; ILO unemployment rates indicate that Gloucestershire performs better than Great Britain and about the same as the South West.
- Industrial change is altering the occupational structure of the UK, with the decline of the manufacturing sector and growth in the service sector, and a corresponding increase in the demand for skills. According to the SW Observatory Economy Model the number of people employed is likely to decline further and by 2015 will have returned to the 2009 level.
- In Gloucestershire in 2007 the knowledge based economy accounted for some 55,300 employees representing some 21% of the total number of employees
- Some 15,800 migrant workers have applied for National Insurance numbers since April 2003. This represents 4.5% of the 2007 projected working population.

Discussion

101 The SW Observatory predictions referred to above and the decline in numbers employed are not just because of unemployment[24]. The Observatory expects the house building starts to be significantly delayed, thus reducing the workforce. This could in the future cause the number of job vacancies to increase substantially, with a risk to the economy, although this would probably trigger an increase in house building activity.

102 There is no direct measurement of jobs in the County. The nearest equivalent is the number of people employed, including self employed, which in 2008 averaged 279,700 (down from 286,800 in 2007); or 79.9% of those aged 16-64. Similarly there is no overall count of job vacancies, the best measure is the number of Jobcentre Plus vacancies; in June 2009, there were 2,376 (down from 4,000 in November 2008), which is not the complete total. Finally the number claiming Jobseekers Allowance in June 2009, which is not a complete count of all that are unemployed, was 12,600, an increase of 5,400 (133%) in 12 months. The immediate issue concerning jobs is the recession leading to unemployment. In the 1990s GDP bottomed in September 1990 but unemployment did not peak until March 1993, two and a half years later, when it reached 23,200. The current recession may not follow a similar pattern but it is certain that unemployment will grow for many months once GDP stops falling.

103 In some wards in Gloucestershire unemployment is high, principally in the urban areas. High levels of unemployment are a key factor in damaging social cohesion, particularly in urban areas, which leads to wider consequences for the community. Pro-active measures are needed to tackle the problem. The Gloucester City Employment Plan is a new initiative designed to: "Improve the engagement of workless and low skilled individuals, ensuring a co-ordinated approach at the local level; improve the employability and skills of those not in work and in low skilled occupations through a more intensive, flexible and bespoke approach; and, engage with employers to encourage and support them to recruit from priority groups, retain people in employment and commit to re-skill, up skill and succession plan their workforce". It differs from previous initiatives in its determination to involve in a more effective way employers both by seeking their help and co-operation and by offering them support in return. Its success is of critical importance to Gloucestershire. Furthermore the approach needs to be spread throughout the County, particularly in Cheltenham, as quickly as possible.

104 Whilst minimising unemployment is the immediate challenge in the longer term Gloucestershire needs to come out of the recession having retained the diversity of jobs in terms of sector and size of business whilst increasing the proportion of higher level jobs. This will in the longer term contribute to productivity led growth, one of the three priorities in the RDA Corporate Plan 2008-2011. This means maintaining initiatives such as the Investor Support and Inward Investment Programmes, but also developing initiatives to promote diversification into emerging services, new markets, and sectors with high output and growth. The environmental and sustainable energy sectors have real potential for high growth and there are future opportunities linked to delivering a low carbon economy.

105 Jobs are also an essential element of 'sustainable rural communities'. There is some debate about what is meant by the term but for the purpose of this strategy whether in a market town or an isolated village there needs to be within a five mile radius jobs for about 40% of the population. These need to demand a variety of skills and aptitudes.

[24] South West Economy Projections – Spring 2009 (SW Observatory)

106 The Third or Voluntary Sector plays a key role in the economy as a vital delivery arm, particularly in engaging with the 'hard to reach' parts of the community. A recent study[25] identified 2850 Third Sector organisations in Gloucestershire and calculated that the total paid workforce in these was about 14,000 supported by 140,000 volunteers, 34% of the adult population of the County. Local Authorities are increasingly commissioning work from the 3rd Sector and encouraging entrepreneurial skills to improve enterprise and develop a service contract culture.

107 Nearly 20% of the working age population in Gloucestershire class themselves as disabled under the Disability Discrimination Act (1995)[26] and their employment rate is only 45%. This represents a significant loss of economic capacity as well as a substantial cost to the taxpayer in benefits, which needs to be addressed.[27]

108 Sickness amongst the workforce can be a significant economic problem for businesses, particularly small ones. The Gloucestershire Food Vision, developed in 2005, aims to make Gloucestershire the healthiest county in the UK

109 The importance of a number of current economic regeneration initiatives in helping to deliver jobs should be recognised. They include the Gloucester Heritage Urban Regeneration Company, the Civic Pride initiative in Cheltenham, the Cotswold Canals Project that will regenerate the Severn Thames Canal thorough the heart of Stroud and its urban area and the multi-site local regeneration programme in the Forest of Dean.

Delivery

110 The Gloucestershire First partners will increase the number of productive and satisfying jobs by:

- Supporting the successful delivery of the Gloucester City Employment Plan and its expansion to the rest of Gloucestershire as quickly as possible.
- Promoting and supporting new and emerging wealth-creating businesses and industries, particularly in the 'knowledge economy'.
- Maintaining and strengthening existing key employment sectors and attracting and retaining valuable Foreign Direct Investment jobs.
- Exploiting the opportunity to participate in the jobs that will deliver the regeneration projects.
- Recognising the value of the 3rd Sector both in its contribution to the economy and its provision of jobs and supporting initiatives to strengthen it.
- Increasing the number of economically active people with disabilities in Gloucestershire and the health of the workforce in general.

Roles and Responsibilities

111 Gloucestershire First, as the County's economic partnership, is responsible for the development of the Economic Strategy for Gloucestershire 2009-2013, which is a major part of The Gloucestershire Conference Sustainable Community Strategy.

112 Gloucestershire First has three economic advisory panels[28]:

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[25] "Everybody Counts – Mapping the Third Sector in Gloucestershire" 2007
[26] The Economy of Gloucestershire 2006/07 Section 8.4 (GLMIU)
[27] The County host the National Star College at Ullenwood whost role is to provide FE to young people with disabilities and also to help the lead as normal a life as possible.
[28] An Employment and Skills Advisory Panel was formed in May 2009

- **The Economic Strategy Advisory Panel (ESAP)**, whose role is to: Monitor national and regional economic policies and strategies, the annual report on The Economy of Gloucestershire and advise Gloucestershire First if any changes to the economic strategy are required; identify external threats and opportunities for the Gloucestershire economy; support and guide the development of the Integrated Economic Strategy; propose to Gloucestershire First, in conjunction with the other economic panels, the priorities for the annual Economic Strategy Delivery Plan; monitor, in conjunction with the other advisory panels, progress with the annual Economic Strategy Delivery Plan and report regularly to Gloucestershire First.
- **The Rural Economy Advisory Panel (REAP**) was established to develop and deliver a Rural Economic Strategy for Gloucestershire. In the future its role will be to: Ensure the Integrated Economic Strategy addresses the needs of the economy in rural areas; advise on the rural priorities that should be included in the annual Economic Strategy Delivery Plan; ensure that SWRDA are aware of the needs of the economy in rural areas in Gloucestershire; 'Rural proof' all Regional consultation documents, all Gloucestershire County Council policies, the Local Area Agreement, the Gloucestershire Economic Strategy and its annual delivery plan; advise Gloucestershire First direct where it identifies measures likely to constrain or damage the rural economy of the County.
- **The Urban Economy Advisory Panel (UEAP)** was established to develop the Gloucestershire Urban Economic Strategy. In the future its role will be to: Ensure the Integrated Economic Strategy addresses the needs of the urban economy; advise on the urban priorities that should be included in the annual Economic Strategy Delivery Plan; ensure that SWRDA are aware of the needs of the urban economy in Gloucestershire; 'Urban proof' all Regional consultation documents, all Gloucestershire County Council policies, the Local Area Agreement, the Gloucestershire Economic Strategy and its annual delivery plan; advise Gloucestershire First direct where it identifies measures likely to constrain or damage the urban economy of the County.

Delivery

113 The effectiveness of an economic strategy is entirely dependent on whether it is translated into successful action. The Gloucestershire Economic Strategy Delivery Plan will cover a three year rolling period and be revised annually. It is intended that it should comprise an individual section for each Gloucestershire First partner detailing what they are able to commit to delivering in each of the three years against the priorities that are agreed.

114 The annual timetable for drafting the Delivery Plan will be as follows

- August – The Economy of Gloucestershire (the evidence base) published by the County Council
- August/September – ESAP with advice from REAP and UEAP develop priorities for the coming year for agreement by Gloucestershire First at the October meeting
- October to January – Gloucestershire First partners invited to say what they are able to commit to delivering over the three years (after the first year this may be a matter of confirming their previous submission).
- January – Draft Delivery Plan discussed by Gloucestershire First with the aim of identifying how any gaps can be filled.
- February/March – Delivery Plan finalised and adopted.

Glossary

AONB – Area of Outstanding National Beauty

Cotswold's Conservation Board - the organisation that exists to conserve and enhance the Cotswold's Area of Outstanding Natural Beauty (AONB).

DECC – Department of Energy and Climate Change

DEFRA - Department for Environment, Food and Rural Affairs

FSB - Federation of Small Businesses

GCC - Gloucestershire County Council

GCHQ - Government Communications Headquarters based in Cheltenham

GHURC - Gloucester Heritage Urban Regeneration Company

GRCC - Gloucestershire Rural Community Council

Gross Value Added (GVA) – used to estimate the value of goods and services produced in an economy

Gross Domestic Product (GDP) - a basic measure of a country's economic performance; the market value of all final goods and services made within the borders of a nation in a year.

HEFCE - Higher Education Funding Council for England

ICT - Information and Communication Technologies

ILO – International Labour Organisation

Index of Multiple Deprivation - combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England. This allows each area to be ranked relative to one another according to their level of deprivation

Joint Strategic Commissioning Plan (JSCPs) - set out the priorities for a local area agreed between central government and a local area (the local authority and Local Strategic Partnership) and other key partners at the local level. These are set to replace the prescribed Local Area Agreements – established in 2004 – in 2010.

LSC - Learning & Skills Council

LTP - Local Transport Plan

NEET – 16-19 year olds who are Not in Employment Education or Training

NVQ - National Vocational Qualification

RES - Regional Economic Strategy 2006 – 2015

RDP-E - Rural Development Programme for England 2007-2013 an EU programme principally for land based businesses

RSS - Regional Spatial Strategy 2006 – 2026, the final version has been delayed; hence it is still a draft.

SME - Small and Medium sized Enterprises

Super Output Areas (SOA) - a geographical area containing 1000-3000 people used in the UK for statistical analysis. SOAs were created with the intention that they would not be subject to frequent boundary change. This makes SOAs more suitable to analyse statistical information (such as population) figures than other geography units (such as Wards) because they are less likely to change over time.

South West Observatory - the regional information gateway to access a network of analysts and information across a broad range of demographic, environmental and economic services.

SWRDA - South West Regional Development Agency

Solutions for Business - Solutions for Business is the new name for publicly funded business support - offering a range of services and solutions to meet real business needs accessed through Business Link.

Third Sector - relates to the social economy, which embraces a wide range of community, voluntary and not-for-profit/social enterprise activities

Waste Hierarchy - the standard guide to the priorities for waste management – from the ideal of prevention, to reduction, re-use, recycling, energy recovery and, ultimately, disposal.

Annex A to
The Gloucestershire Integrated Economic Strategy

Context

European Union Context

1 The strategic framework for much of the Government's economic policy is set collaboratively within the European Union (EU). The Lisbon Strategy, launched in March 2000 in response to global competition, sets specific targets for lasting growth and the creation of more and better jobs. Environmental aspirations were added in the Gothenburg Agreement of 2001. National Action Plans are statistically monitored against the EU's Guidelines for Growth and Jobs and the results contribute to macro economic forecasts.

2 Much of the UK's agenda for sustainable development and the environment, for employment, health and safety, social security, pensions, education and training reflects EU policy, which therefore has a direct impact on the UK economy. There is potential to influence policy through the network of South West Members of the European Parliament (MEPs) and by approach to the European Commission via agencies such as the Local Government Association (LGA) and the South West UK Brussels Office (SWUKBO).

3 Other EU policies on Agriculture, Competition, Environment and Cohesion have an impact at local as well as macro level and present opportunities for funding through the Rural Development Plan for England (RDPE), focused on the rural economy and rural communities; the European Social Fund (ESF) with its fostering of jobs and skills and the European Regional Development Fund (ERDF) with its support for business, innovation and enterprise.

4 There is additional funding for research, demonstration projects, networking and good practice exchange through programmes focused on specific areas such as lifelong learning, the management of biodiversity, energy and waste, risk management, climate change and its impacts, sustainable transport, youth and culture, and the enhancement of the economic performance of cities, towns and rural areas.

National Context

5 The Government has published a range of policy documents relevant to the development of an Economic Strategy for Gloucestershire:

- **Joint Strategic Commissioning Plans**, introduced in 2004 as Local Area Agreements, endeavoured to set out the priorities for a local area agreed between central government and a locality (the local authority and Local Strategic Partnership) and other key partners at the local level. In Gloucestershire's case, this Economic Strategy and its subsequent Delivery Plan doubles as the JSCP for Gloucestershire.
- A series of Government initiatives have had the general aim of decentralising the power base and empowering local government. These include: The 2006 White Paper, **"Strong and Prosperous Communities"**[29]; its vision was of re-vitalised local authorities, working with their partners, to reshape public services around the citizens and communities that use them. **The Sustainable Communities Act 2007**[30] creates a duty for Government to produce a local spending report that details, for each local authority area, the amount of public money spent by all the relevant agencies (central, regional and local) on services and projects over a given period; invites local authorities to make

[29] DCLG 'Strong and Propsperous Communities; the Local Government White Paper' 26 October 2006
[30] Sustainable Communities Act 2007 received Royal Assent and was published on the 23 Oct 2007

proposals which they consider would contribute to promoting the sustainability of local communities. "Communities in Control: real people, real power"[31], a 2007 White Paper on empowerment aims: "To rehabilitate local political activity as a worthwhile activity, conducted by decent people in pursuit of noble aims." 'Transforming places, changing lives: a framework for regeneration[32]' is a consultation document, which sets out proposals to: Co-ordinate and prioritise regeneration investment; align investment behind local and regional regeneration priorities; and, focus regeneration investment on tackling the underlying economic challenges holding back deprived areas, focusing on jobs and enterprise.

6 The 2007 White Paper "**Planning for a Sustainable Future**"[33] sets out the Government's detailed proposals for reform of the planning system, to improve the speed, responsiveness and efficiency in land use planning, and taking forward proposals for reform of major infrastructure planning. It proposed reforms on how the Government would take decisions on nationally significant infrastructure projects, responding to the challenges of economic globalization and climate change and also included reforms to the Town and Country Planning system to make it more responsive. The draft '**Planning Policy Statement 4 'Planning for Sustainable Economic Development'** sets out how planning bodies should, in the wider context of delivering sustainable development, positively plan for sustainable economic growth and respond to the challenges of the global economy, in their plan policies and planning decisions.

7 **Sub-National Review**. The Sub National Review of Economic Development and Regeneration was published in 2007 and after a period of consultation the Government has announced how it intends to proceed. The key points are:

- The production of the new regional strategy and reformed regional governance structures.
- Ways for local authorities to set-up formal collaborative arrangements on economic development with the RDA.
- The creation of an economic assessment duty on upper tier and unitary local authorities.
- The delegation of decision-making by RDAs to local authorities and sub-regional partners.

8 **Local Development Frameworks**. A new planning system to manage development in towns and the countryside[34] was agreed in 2004. It introduced a new 'two-tiered' system of: Regional Spatial Strategies (RSS) - prepared by the regional planning bodies, which set out a broad spatial planning strategy for how a region should look in 15 to 20 years time; and, Local Development Frameworks (LDF) - a folder of local development documents prepared by district councils, unitary authorities or national park authorities that outline the spatial planning strategy for the local area. A key element of the LDF is the role of community involvement in the plan-making process. This gives local businesses and communities the opportunity to make planning more relevant and aware of the needs of the economy.

9 There are a number of policies relating to a low carbon economy. **The UK Low Carbon Economy Transition Plan** July 2009) plots out how the UK will meet the cut in emissions set out in the budget of 34% on 1990 levels by 2020. The UK Renewable Energy Strategy (July 2009) sets out how we all have a role to play in promoting renewable energy, from individuals to communities to businesses. **The UK Low Carbon Industrial Strategy** offers a strategic view of Britain's low carbon strengths

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[31] Ministry of Justice and DCLG 'Communities in Control: real people, real power' 6 July 2008
[32] 'Transforming Places, Changing Lives, a framework for regeneration'. DCLG 25 July 2008
[33] DCLG 'Planning for a Sustainable Future' 21 May 2007
[34] The Planning and Compulsory Purchase Act 2004

and opportunities, detailed actions, and a solid basis for cross-Whitehall implementation.

Regional Context

10 The draft **Regional Spatial Strategy (RSS)** for the SW proposes concentrating the majority of future development over the next 20 years in Strategically Significant Cities and Towns (SSCTs). Both Gloucester and Cheltenham are identified as two of twenty-one SSCTs in the south-west region. Development Policy A of the draft RSS states: "Provision will be made to maintain and enhance the SSCTs' regionally and sub-regionally significant roles and functions for housing, employment, cultural, education, retail, health and other services and facilities and as strategic hubs for public transport".

11 The draft RSS sets out a requirement for about 35,000 of the total 48,600 new homes to be in the Gloucester and Cheltenham SCCTs together with around 22,000 jobs and 118 hectares of employment land in the Gloucester and Cheltenham travel to work area by 2026.

12 Development Policy B addresses **Development at Market and Coastal Towns.** It states: "At Market and Coastal Towns that meet all of the following criteria:

- There is an existing concentration of business and employment and realistic potential for employment opportunities to be developed and enhanced
- There are shopping, cultural, faith, education, health and public services that meet the needs of the town settlement and the surrounding area
- There are sustainable transport modes that can be maintained or developed to meet identified community needs in the settlement and the surrounding area provision will be made for housing, employment, shopping and other services that increase their self-containment and enhance their roles as service centres."

13 Development Policy C covers **Development at Small Towns and Villages** and states: "In small towns and villages greater self-containment and stronger local communities will be promoted by making provision that:

- Supports activity appropriate to the scale of the settlement.
- Extends the range of services to better meet the needs of the settlement and its surrounding area,
- Meets identified local housing needs.

14 **The Regional Economic Strategy.** The Regional Economic Strategy 2006-2015[35] states: "The region will be bold and visionary in the transformation of its cities and larger towns, ensuring that they provide viable and attractive places to live, work, shop and play. This change will be on a scale that maximises their potential and competitiveness, responding to and creating new markets that will help to achieve critical mass and address key challenges such as congestion. Knowledge, technology, entrepreneurship and leadership are at the heart of successful cities. This means increasing investment in infrastructure, culture and regeneration". The three Strategic Objectives in the Regional Economic Strategy are: Successful and competitive businesses; strong and inclusive communities, and; an effective and confident region.

15 **The South West RDA's Corporate Plan 2008-2011.** The RDA Corporate Plan 2008-2011 was designed to be a three year corporate plan set within a twenty year outlook. It stated: "Our economy in the South West is not as productive as it could be and, with turbulence in the financial markets, the long period of steady economic growth is probably coming to an end. Climate change, population growth and globalisation –

[35] Regional Economic Strategy for South West England 2006-2015 (SWRDA 2006)

trading and competing across the world – are major issues for the future of our economy. Given these challenges, our core strategy is focused on:

- Creating the conditions for productivity led growth measured by GVA per hour relative to the UK average.
- Developing a low carbon economy – with the ultimate aim a zero carbon investment portfolio by 2013.
- Creating successful places – particularly the places we identify in this plan as priorities which include … Gloucester/Cheltenham[36]."

This Plan is currently being refreshed under the title **'What Now'** covering 2009-2011. The draft reflects the changes in the RDA's circumstances and draws on lessons learned from the independent national evaluation of the impact of RDAs' activities since 2002. The core thinking behind last year's plan remains the same but with a sharper focus on the most important things:

- Making sure the South West leads the way for low carbon and resource efficiency;
- Getting the innovation, research and skills right for our high-value businesses;
- And focusing on those sectors and places which will have the most transformational impact on the region's economy.

16 **The SW Sustainable Farming & Food Plan 2008-2011 "Changing Landscapes**, Changing Outlooks" was 'refreshed' in 2007. Its actions are set out under 3 key themes: Strengthening the knowledge base to support business profitability and respond to new opportunities; enabling regional and local sourcing and the sustainable development of supply chains; realising the value of the region' environmental assets

17 **Rural Development Programme-England 2007-2013 (RDP-E**) is a European Programme funded through modulation of Single Farm Payments under the Common Agricultural Policy. Each RDA has drawn up a Regional Implementation Plan (RIP) for the delivery of grants under Axis 1 and 3; in the SW this is a combination of commissioned themes and business support grants. Axis 2 is delivered by Natural England and the Forestry Commission principally through environmental schemes. About £100M is available for the SW less Cornwall under Axis 1 and 3.

Gloucestershire Context

18 **Core Strategies**. The Core Strategy is the most important part of the Local Development Framework. It identifies the key, strategic issues of most importance to the local area and translates these into a strategy for tackling them. Examples include how to provide more affordable housing, reduce traffic congestion and tackle climate change. In Gloucestershire a Joint Core Strategy is being developed by the County Council, Gloucester City, Cheltenham Borough and Tewkesbury Borough together while Stroud, Cotswold and the Forest of Dean District Councils are each also developing a Core Strategy. Adoption of these is planned for 2011. Concurrently Gloucestershire County Council is developing a Strategic Infrastructure Delivery Plan for the County.

19 **Joint Strategic Commissioning Plan/Local Area Agreement 2008-2011.** The RDA has made clear that its investment plans will be principally based on the delivery of the Economic Theme in the Joint Strategic Commissioning Plan/Local Area Agreements. Gloucestershire's revised Local Area Agreement 2008-2011 was submitted in March 2009 together with a Delivery Plan for 2009-2011 finalise in July 2009. In the latter the Economic Theme has four goals, to:

- Increase the number and quality of jobs.

[36] Whilst the RSS identifies Gloucester and Cheltenham as separate SSCTs, the RDA Corporate Plan identifies Gloucester and Cheltenham as a single economic priority place.

- Increase the number and range of skilled employees by improving the skills of local people.
- Within the context of the Gloucestershire Economic Strategy we will realise the potential of Cheltenham and Gloucester and the surrounding area.
- We will develop a stronger, more diverse and sustainable rural economy by delivering the Rural Economic Strategy.

20 **'Our Place: Our Future'** is The Gloucestershire Conference Sustainable Community Strategy 2007-2017. Its vision, which is also the **vision** of this Economic Strategy, is:
"We want Gloucestershire to be a place where:

- **the actions we all take today mean that Gloucestershire remains a great place to live and work, and**
- **we do not compromise the quality of life for future generations"**

Annex B to
The Integrated Economic Strategy
For Gloucestershire 2009-2015
Gloucestershire First: Members July 2009

Representing	Nomination
ACT Consultancy & Training	Shirley Hill
Advanced Engineering/Aerospace Sector	Alison Starr
Agriculture (Farming & Forestry)	Henry Robinson
Barton & Tredworth Developments	Howard Francis
CBI (Gloucestershire Branch)	Tim Heal
Cheltenham BC	Cllr Stephen Jordan
Community Enterprise	Mark Gale
Cotswold DC	Cllr David Fowles
Creative Industries Sector	Tbc
Direxions for Success	Simon Cusworth
Economic Strategy Advisory Panel	Michael Tripp
Employment & Skills Advisory Panel	Anthony McClaran
Engineering Supply Chain	Graham Adams
Fair Play South West	Sharon Lee Sheather
Federation of Gloucestershire Colleges	Nigel Robbins
Federation of Small Businesses	Terry Morgan
Finance/Business Services Sector	Michael Tallett-Williams
Food and Drink Sector	Professor Colin Dennis
Forest of Dean DC	Cllr Patrick Molyneux
Gloucester City Council	Cllr Paul James
Gloucestershire Assembly	Sue McClung
Gloucestershire Chamber of Commerce & Industry	Geoff Day
Gloucestershire County Council	Cllr Will Windsor Clive Cllr Barry Dare Duncan Jordan
Gloucestershire Development Agency	David Owen (CE Gloucestershire First)
Gloucestershire Round Table for Sustainable Development	Alex Steele
Gloucestershire Rural Community Council	John Hazelwood (Chairman Gloucestershire First)
Government Office for the South West	Tbc
Higher Education	Professor Patricia Broadfoot
ICT	Tbc
Jobcentre Plus	Jill Annal
Learning & Skills Council	Tim Smithson
Leisure, Tourism & Hospitality Sector	Edward Gillespie
Manufacturing/Engineering Sector	Dave Evans
NHS Health Trusts	Jan Stubbings
Northern Arc (Business Link)	Phil Smith
Property Development	Tim Heal
Rural Economic Strategy Advisory Panel	Robin Grist
Small Businesses	David Tate
South West Regional Development Agency	Ian Knight
South West TUC	Christine Starling
Stroud DC	Cllr Chas Fellows
Tewkesbury BC	Cllr Phillip Taylor
Urban Economic Strategy Advisory Panel	Rob Cawthorne