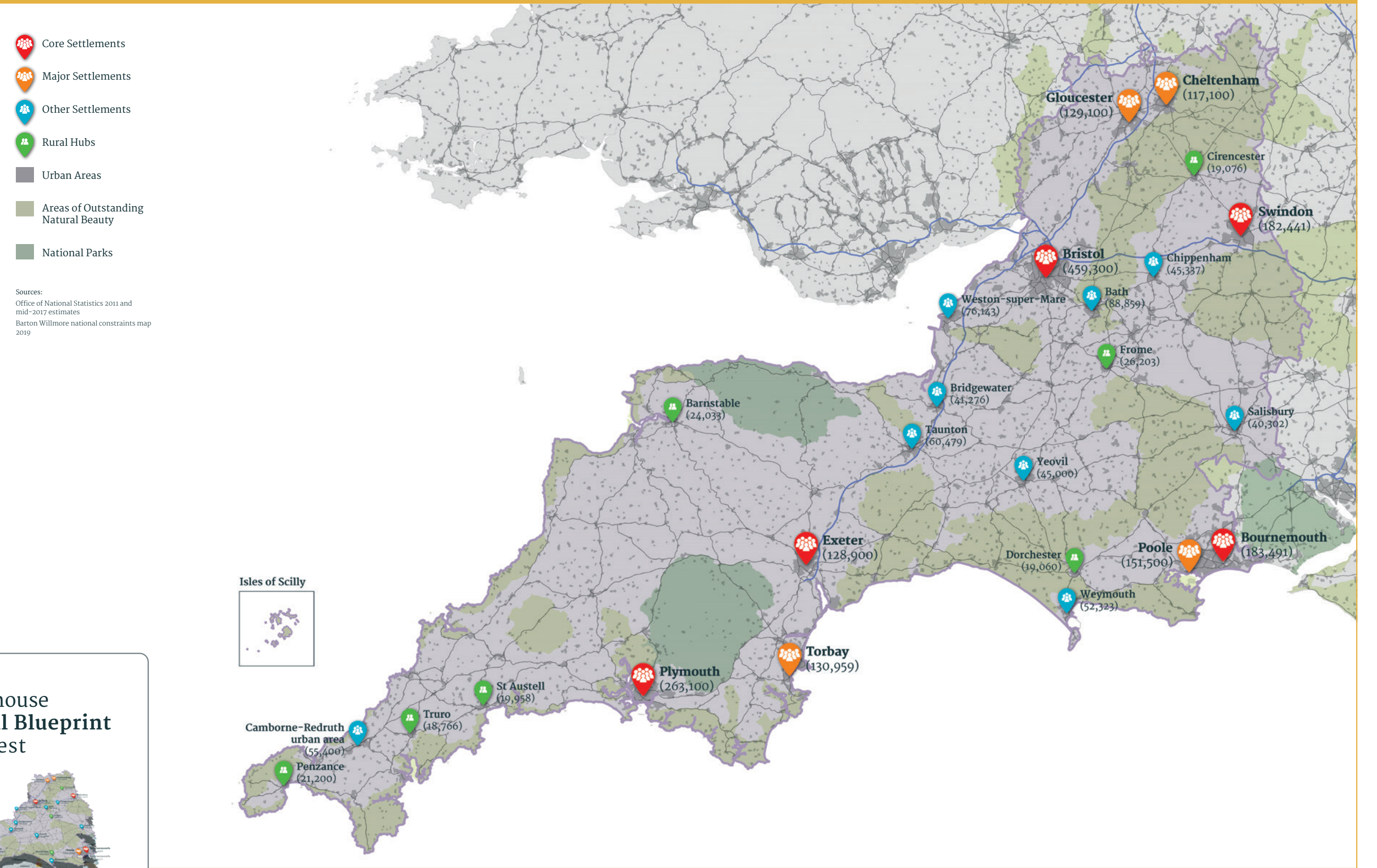


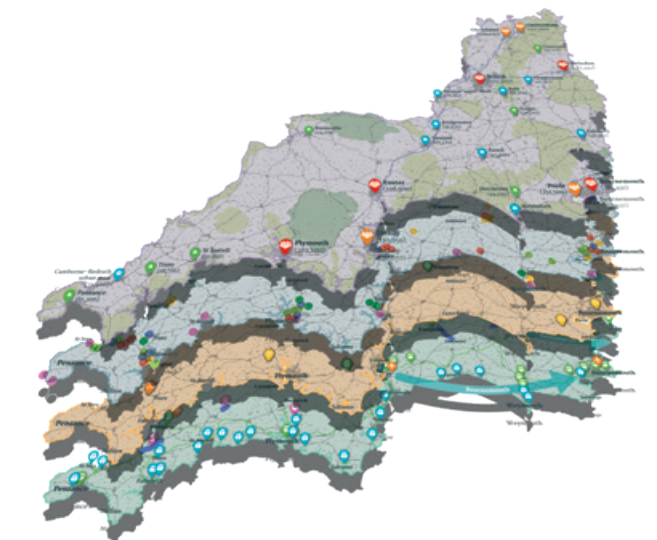
Our Connectivity



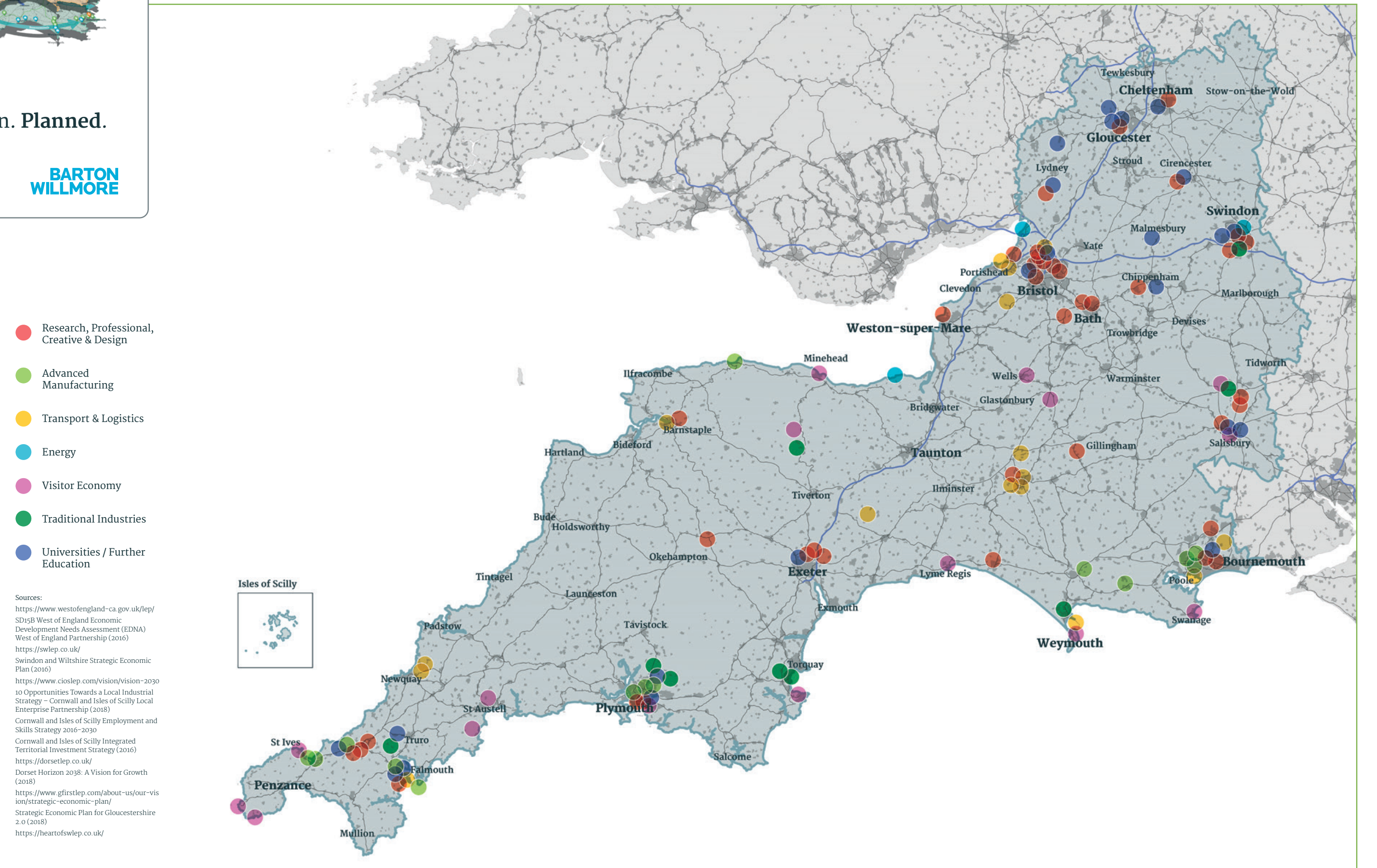
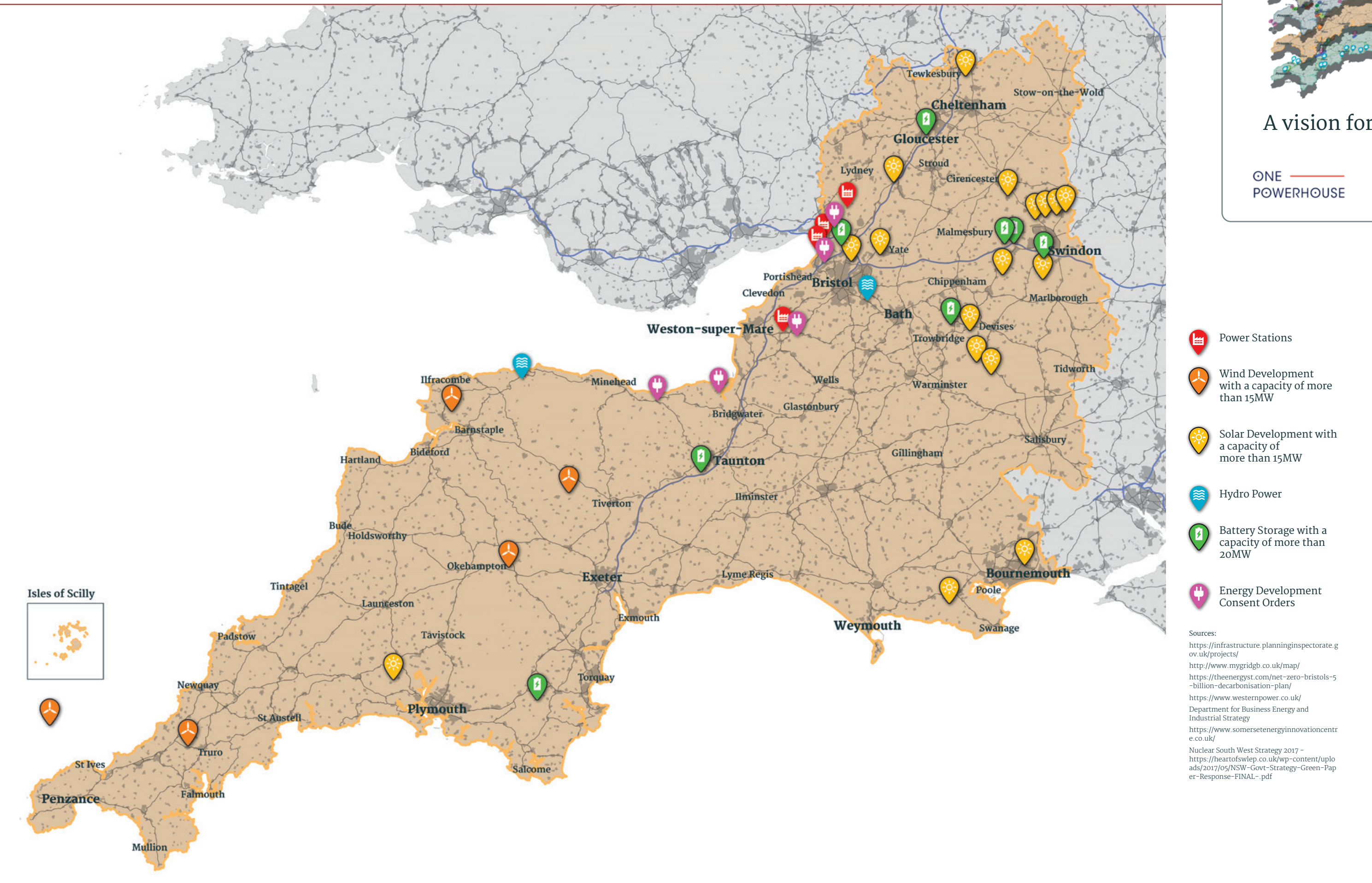
Our People and Places



One Powerhouse Towards a Spatial Blueprint South West



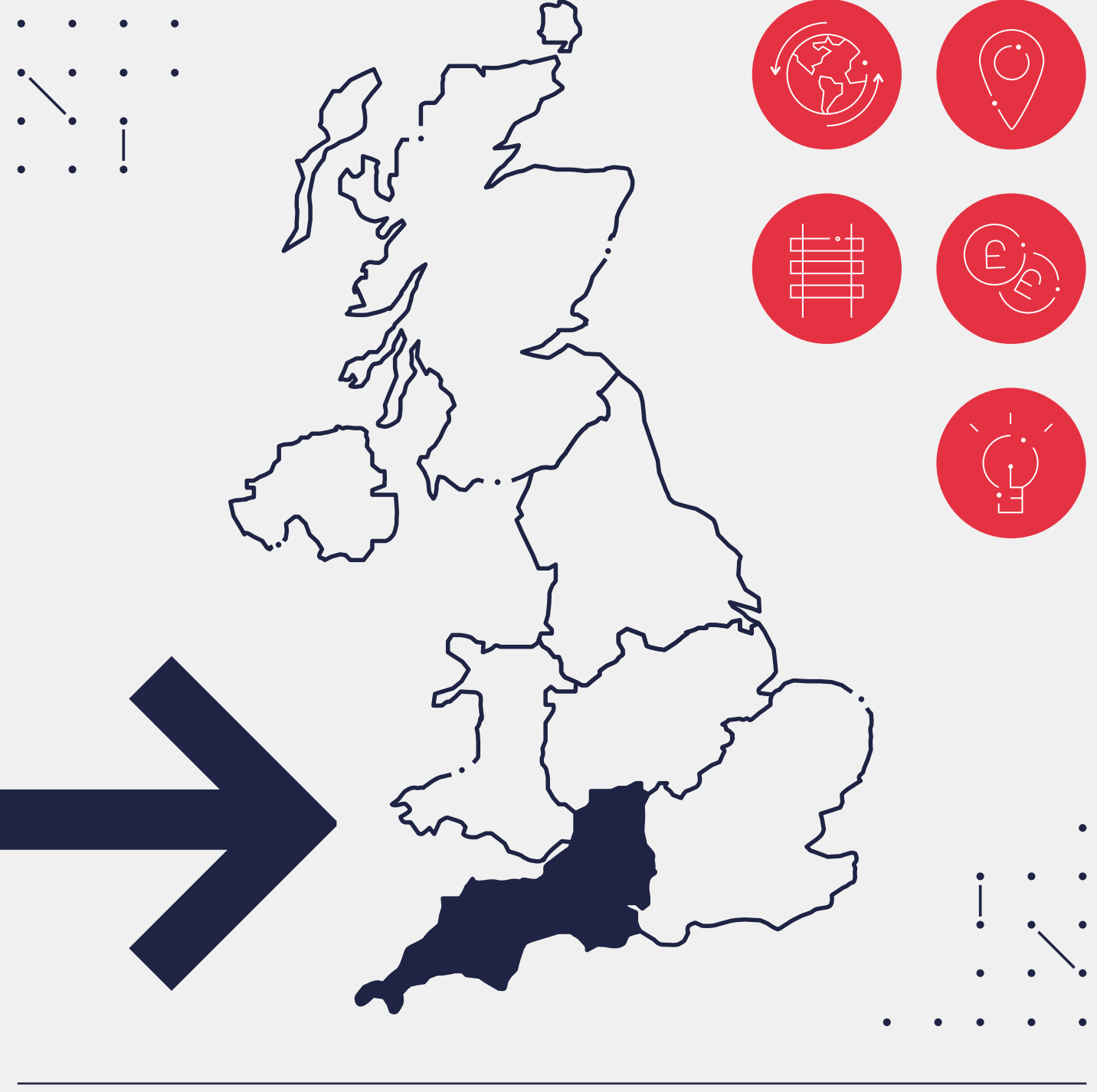
A vision for Britain. Planned.



Our Environment and Energy

Our Economy

One Powerhouse Towards a spatial blueprint South West



BARTON WILLMORE

A Vision for Britain. Planned.

The One Powerhouse Consortium, supported by The Sir Hugh and Lady Ruby Sykes Charitable Trust, believes that a substantial part of the problem of regional inequality in the UK can be solved not just by money, but by the transformative potential of spatial planning.

Spatial planning is the 'where' of decisions. It looks at a defined geographical area and makes an assessment of everything contained in that area – towns, cities, housing, schools, universities, roads, rails, airports, offices, factories, hospitals, energy sources, museums, parks and leisure activities – and makes a plan to develop those assets for the benefit of the people who live in that region, now and for the future.

Regional inequality in the UK

Today, just under half of the UK population live in regions with a comparable productivity to the poorer parts of former East Germany – and comparable living standards are worse. According to the recent UK2070 Commission, the UK today is more intraregionally unequal than Germany was in 1995. Since reunification, Germany has since pulled itself together, through decisive investment programmes underpinned by visionary spatial planning. During a similar period the UK, on the other hand, has fragmented.

The nature and extent of the so-called 'North-South' divide can be presented in many forms. Maps showing economic productivity, educational attainment and poor health all present sharp disparities between regions and nations. Current forecasts suggest the situation will only get worse and that in fact the economy of London and the South East is 'decoupling' from the rest of the UK (McCann 2016). The repercussions are stark and grow more evident all the time.

Spatially-sensitive policy is not simply a matter of social justice and political prudence. Regional prosperity drives national prosperity and so regional imbalance constrains overall performance. Accommodating agglomeration in some places while servicing mounting welfare bills in others damages the UK's fiscal balance and exacerbates the underlying problem.

The value of place and scale

There is evidence that spatial planning has already begun to deliver results in the UK. We are not alone in recognising that the two 'regional economies' that have the highest levels of productivity are those where there are coherent regional economic plans: London and Scotland.

Indeed, in England, there is good work taking place through some Local Enterprise Partnerships (LEPs) and Combined Authorities and Mayoralties but not all. In strategic planning and investment terms, these tend to be rather small and the outcome is rather patchwork.

Our Plan

The clear 'gap' in terms of economic planning in the UK, therefore, is at the level of the English regions. Any spatial strategy needs to bring together the best local industrial strategies and plans within a wider regional strategy framework. The foundations of how this can be achieved are already present. The regions of England are already coming together: The Northern Powerhouse, The Midlands Engine, The Great South West and The Wider South East all exist as functional identities.

Our ambition has been to prepare a series of draft spatial blueprints that will better enable decision-making and prioritisation of investment across the country and thus help the UK as a whole develop over the long term – creating opportunity for all, jobs for all and prosperity for all.

Our definition of a blueprint is that of 'an early plan or design that explains how something might be achieved' (Cambridge dictionary). While based on thorough analysis and evaluation, our draft blueprints are by no means the finished product but they point to what could be achieved with better resourcing, co-ordination and support.

The technical work has been led by planning consultancies linked to the regions: Atkins in the North, Barton Willmore in the Midlands and the South West and Aecom in the South East. The One Powerhouse Consortium has also worked hand-in-hand with the UK2070 Commission and drawn upon the support of the well-respected think tank the RSA.

Challenges

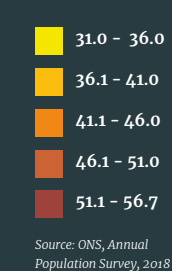
Challenge 1 - Connectivity and Congestion in the Region: The region is strong and vibrant, attracting start up and inward investors from across the world and comprises rural areas and coastal towns and cities, many of which are popular tourist destinations. Connecting a diverse and dispersed economy and population within and beyond the region remains a key challenge. The region has the lowest regional infrastructure spending per head in the country.

Challenge 2 - The Significant Need for New Homes and Affordable Homes: Providing a sufficient amount of housing that is affordable, meeting the needs of all, and located in the right places.

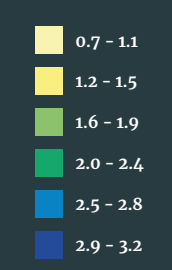
Challenge 3 - The Skills Gap in the Region & Retention of Skills/ Attracting Talent: Despite recent growth and its economic specialisms, the South West's economy makes up 7.3% of the UK's total GVA. This is one of the lowest of England's regions, and is due to several reasons including lack of productivity and skills gap, high house prices and a low wage economy, poor transport and infrastructure, gaps in high speed broadband coverage and mobile network in rural areas, difficulty in retaining and attracting talented people and a high proportion of retired people.

Challenge 4 - Climate Change and Achieving Zero Carbon: A constraint for the region is the rapid growth in construction of distributed renewable energy developments, including solar farms which has led to a large strain on the grid network. The combination of this and the evergrowing expectation of producing low carbon development to achieve the legally binding government target, presents a challenge for the region. There could be significant challenges over the next 50 years with the ability of the network to provide sufficient capacity for the region as it develops and the population grows. In However, there are opportunities for wider use of natural resources; developing energy infrastructure; and marine sector growth. These underpin the ability of the region to contribute to its own and the UK's Net Zero carbon requirements.

Resident Population in Employment aged 16-64 NVQ4+



Claimants as a proportion of residents aged 16-64



Source: ONS, Annual Population Survey, 2018

Source: ONS, Claimant Count Data, July 2019

Source: ONS, Claimant Count Data, July 2019

Source: ONS, Claimant Count Data, July 2019

Source: ONS, Claimant Count Data, July 2019

SW context

The region's economy is worth approximately £127 billion (House of Commons 2018). It is home to clusters of world leading sectors ranging from aerospace to digital and creative. There are several prosperous areas within the region with some, such as Gloucestershire, showing an above average growth in productivity for the past five years.

The region has a high concentration of high-tech manufacturing firms, with notable clusters in Gloucestershire and Bristol. Aerospace and advanced manufacturing are integral components of the South West cluster and key to delivery of the UK Aerospace industrial strategy.

The South West is ideally located for research and energy development. It also has a strong manufacturing base in marine, food and drink, and engineering. The visitor economy sector plays an important economic role in the region and is a significant source of employment.

There are also opportunities to direct some housing growth to more isolated parts of the region and stimulating economic activity in the west of the peninsula, realising the potential of Strategically Significant Cities and Towns (SSCTs) in the centre and north of the region, and allowing carefully managed growth occur in the south east of the region.

South West Enterprise Zones



There are opportunities to tackle the demographic and spatial disparity in the region through providing a greater mix of housing in areas with aging populations, particularly affordable family housing. This will of course need to be linked to employment opportunities.

Unless there is a change in policy direction economic inequalities will grow, and the South West will experience increased problems of housing affordability and pressure on existing infrastructure. House prices and rents are high, yet house building is low indicating that the regional housing crisis will worsen.

Climate change is the issue of our time, and the complexity of climate change means that it touches upon all other themes and interventions in this report, from reducing the emissions associated with travel, to adapting to changes in sea levels, to reversing harmful trends in biodiversity, to innovating in the development of energy generation. The South West has both leadership on and remains vulnerable to, and therefore forms a focal point for all other interventions.

The SW demography

The population of the South West is over 5.5 million (ONS) - 8% of the UK's population.

The core settlements (with a population of over 180,000), comprising approximately 1 million of the region's population, in order of size in the region are:

1. Bristol;
2. Plymouth;
3. Bournemouth; and
4. Swindon.

Key demographic trends are:

- The region has the oldest median age in the UK (2011 census) with West Somerset having the oldest median age of 48.
- The South West has more people moving in than out, with a net inflow of over 10 people per 1,000 (ONS). There is a net in-flow of 25 people per 1,000 moving to the South West from London.

The region's population is set to grow. Together with increasing household formation and acute affordability problems across the region, this will increase demand for housing.

The region has a ranging population and placement of core economic areas, with the GDP per capita varying from below average in the south of the region to above average in the north of the region. These differences create disparity of place in the region which is a challenge.

With population clusters dispersed across the region, as well as poor public transport connectivity, it is harder for goods, people, and knowledge to move around easily.

South West LEP Areas



Sources: Regional And Local Economic Growth Statistics, House of Commons, September 2018. <https://www.ipnetwork.net/rep-activities/local-industrial-strategies/> https://www.rpl.org.uk/media/2932/39/south_west_briefing_note_2018.pdf

Institutions

The current approach to spatial planning in the region is fragmented and there are six Local Enterprise Partnerships (LEPs), with areas defined in all cases by local authority boundaries but differing significantly in size and economic potential.

Following the revocation of the South West Regional Spatial Strategy in 2010, the absence of a region-wide strategic planning policy mechanism for the region is a barrier to enabling good spatial planning in the region.

In terms of working up a regional plan, the following areas already have sub-regional working arrangements in place for strategic plan-making:

- West of England Combined Authority;
- Cornwall – unitary authority Local Plan;
- Wiltshire – Swindon and Wiltshire Joint Plan;
- Dorset – emerging Plan for the unitary authorities;
- Greater Exeter Strategic Plan; and
- Joint Core Strategy for Gloucester, Cheltenham, Tewkesbury

In Somerset, Somerset West and Taunton are preparing a joint local plan, and looking further to the future the leaders of the Somerset councils (Mendip District Council, Sedgemoor District Council, Somerset County Council, Somerset West and Taunton Council, and South Somerset District Council) are considering options for joint-working and potential local government reorganisation.

A new 'Western Gateway' has been launched which adopts a new regional geography, going from the West of England to Wales, linking a number of towns and cities either side of the Severn. The area has three established city regions, as well as plans for a new city region, but no overarching powerhouse A report, commissioned by Bristol, Cardiff and Newport City Councils, is a response to that challenge and the conclusion is that the Great Western cross border area is a powerhouse waiting to happen. The 'Western Gateway' has been awarded £400,000 from Government to progress the initiative.

In addition, there is the 'Great South West', as established by the South West, Cornwall and Isles of Scilly, and Dorset Local Enterprise Partnerships in 2018. It is a campaign to highlight the South West's economic potential and make the case for Government investment on a par with other UK regions and been launched at Westminster. From our engagement with the LEPs, it is our understanding that discussions are ongoing about the Great South West joining up with the Western Gateway. This proposed change to regional geography has created a state of flux in the region and has resulted in some regional stakeholders being reluctant to engage with our research until they know the outcome of this.

In order to drive forward a regional plan for the South West region the creation of a strategic organisation/body is required. This would work

alongside the existing structures but with a more strategic approach. It would work with the existing LEPs, the universities, and business communities to enable a cross-boundary, strategic approach. The body would be responsible for establishing the strategic priorities for infrastructure, the economy, the environment, health, and social wellbeing. Initially, this could be presented in a business plan for the region, setting out key priorities to 2070. This would enable the region to have 'one voice', giving it more presence nationally, setting out its priorities clearly in one place and giving it more influence to attract investment into the region. The overarching aim of the body and the business plan would be to address regional inequality and mirror similar existing arrangements in other mega regions such as the NP11 Northern network of LEPs, or the Midlands Engine.



Priorities

- Our Connectivity**
 1. Prepare a digital infrastructure upgrade plan for the whole South West region to enable the region to compete internationally.
 2. Host an annual digital infrastructure summit, focused on transformative social and economic change for vulnerable localities and high growth sectors.
 3. Plan for strategic infrastructure connections beyond the region, to Newport, Oxford, Southampton and Birmingham.
- Our Economy**
 4. Prioritise infrastructure-led housing and employment development in towns with hidden strategic potential, for example Weston Super Mare, Cheltenham-Gloucester, Plymouth, Tiverton and Taunton.
 5. Establish a diverse 'places of learning network' involving colleges and universities in towns and cities of all sizes throughout the South West.
 6. Create a public value business plan to underpin inward and government investment in infrastructure and skills, channelled across urban and rural localities in the South West.
- Our People & Places**
 7. Promote the public value business plans under 'One Voice for the South West'.
 8. Create cross-boundary, 'zonal' evidence bases for, in broad terms, the Peninsula, West of England, Gloucestershire/ Cotswolds and Wiltshire/Dorset sub-regions.
 9. Align zonal evidence bases with planning frameworks that match quality of place and design to the quality of the South West's landscape, cultural and heritage assets.
- Our Environment**
 10. Establish a collaborative network that supports intelligent long-term investment in natural capital, to achieve local and sub-regional biodiversity and environmental net-gain including regional forests, e.g. Forest of Avon;
 11. Develop a South West Coastal Strategy, that strategically blends natural, heritage, recreational, maritime, sustainable energy and tourist assets to enable diverse coastal communities to maximise their assets and opportunities.
 12. Develop a complementary carbon strategy to become a net-exporter of zero-carbon energy, combining energy assets and opportunities including coastal, nuclear and on-shore developments.



Address
Barton Willmore
101 Victoria Street,
Bristol
BS1 6PU

Tel
0117 929 9677

Email
faith.beeson-wright@bartonwillmore.co.uk

Contacts

Simon Prescott
Senior Partner
0117 929 9677

Faith Beeson-Wright
Planning Associate
0117 929 9677



Tom Carpen
Infrastructure & Energy Associate
0117 929 9677

Thomas Edmunds
Infrastructure & Energy Planner
02920 660910

