

Hartlepool Economic Assessment – Executive Summary 2010/11







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1.0 Introduction - Councillor Pam Hargreaves - Portfolio Holder for Regeneration & Economic Development

Over the past twelve months, representatives from Hartlepool Borough Council's Economic Development Division have worked closely with key partners to develop the town's first Economic Assessment. This assessment provides a detailed needs analysis of the key drivers that directly, and indirectly, impact on the area's economic capacity and where - dependent on the right conditions - growth may occur in the future.

This assessment has been completed at a time when we are facing major new challenges through shifts in government policy and unprecedented austerity cuts. There is also a growing realisation that the fragility of the global economy may be prolonged and may continue to impact on the local economy, long into the future. Although Hartlepool's economic resilience has been tested in recent times, and it is clear that we should remain cautious, there are exciting opportunities that can be maximised which will bring sustainable social, economic and environmental benefits to the whole town.

Whilst we should always be mindful of these challenges, to achieve the town's longer term ambition and vision will require renewed innovation and determination by all partners. A key element of this assessment is to ensure that all partners from across the public, private and third sector have a full understanding of the economic landscape in which they work and often live in. By developing a comprehensive analysis, which covers all issues which may affect the local economy, the Economic Development Division and its partners have provided the necessary picture in which to create the emerging Economic and Regeneration Strategy (2011-2014).

At its heart, this new strategy will identify the town's key priorities and will show what new infrastructures and improved service-delivery models will need to be implemented to assist the business community and local residents to develop their skills to enter into employment and enhance their aspirations to start up in business.

I would urge all partners to review this 'needs assessment' and contribute to the debate on how best Hartlepool Borough Council and its partners can improve the support available to our business community; continue to improve the revitalisation of our town and advance the economic well-being of all our local residents so that we can remain competitive within a global economy.

2.0 Foreword - Mr Ray Priestman - Chair of the Economic Forum

In 2007, the Review of the Sub-National Economic Development and Regeneration ('SNR') proposed that all upper-tier and unitary local authorities carry out a local Economic Assessment which will outline economic development and regeneration matters. Included within the SNR proposal was a commitment to consult with all key partners on a comprehensive assessment which will compliment and underpin the statements and targets of local areas such as:

1. Sustainable Community Strategy (SCS);
2. Local Development Framework;
3. Local and Multi-Area Agreement targets; and
4. Will assist in helping the authority contribute to the development of the Regional Economic Strategy (RES).

The Department of Communities and Local Government (CLG) endorsed this new statutory Economic Assessment duty as it believes that it will 'add value to existing arrangements and practices'. The **Local Democracy, Economic Development and Construction Bill (2009)** now places a statutory duty with relevant local authorities expected to complete an assessment by April 2011 which will set out the economic vitality and conditions of their particular area.

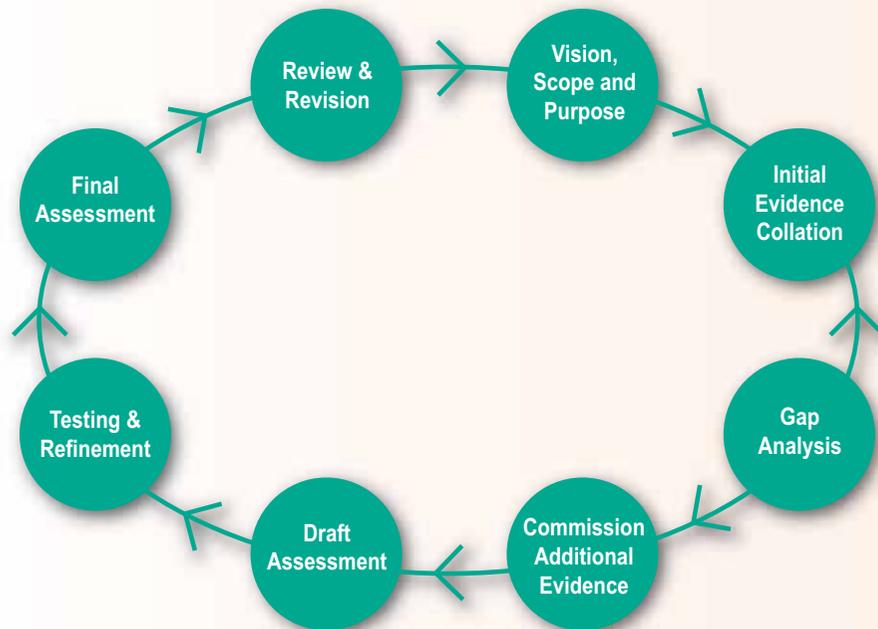
Hartlepool's Economic Assessment will provide the necessary evidence base to increase knowledge and better understand local economic conditions and to analyse how the town makes a significant contribution to wider sub-regional and regional functional markets. By understanding this wider scope of economic activity across multiple boundaries it will provide an insight into the opportunities that the town could maximise and will also reflect the influence that global market forces have at a local level.

Hartlepool's Economic Assessment follows the context of the Tees Valley Wide Economic Assessment which was completed by Tees Valley Unlimited.

This completed assessment will provide the golden thread between the above stated strategies and the emerging Economic Development Strategy which will respond to this needs assessment and which will in particular identify:

- The authority’s capacity and prioritisation in relation to economic development and regeneration interventions.
- Improved interventions to tackle worklessness, skills and enterprise initiatives
- Enhanced ways of working to develop commercial activity and business infrastructure;
- How it can improve local authority engagement with private sector partners; and;
- How the town will respond to the eventual upturn and strengthen jobs and business growth in the long term through sustainable measures.

Hartlepool’s Economic Assessment has been designed to follow a clear and concise process which compliments good practice guidance as outlined within the Improvement and Development Agency and Planning Advisory Service document, ‘How to do a Local Economic Assessment’ (October 2009). The diagram below depicts the process for undertaking this comprehensive assessment at each critical stage.



3.0 Vision Scope & Purpose

The Hartlepool Economic Assessment will adopt the Community Strategy and Neighbourhood Renewal Strategy visions and the Jobs & Economy themed aims.

3.1 Community Strategy

‘Hartlepool will be an ambitious, healthy, respectful, inclusive, thriving and outward-looking community, in an attractive and safe environment where everyone is able to realise their potential.’

3.2 Neighbourhood Renewal Strategy

‘Continue the regeneration of Hartlepool and ensure that local people, organisations and service providers work together to narrow the gap between the most deprived neighbourhoods and the rest of the borough, so that in the future, no one is seriously disadvantaged by where they live’

3.3 Local Area Agreement Jobs & Economy Theme

‘Develop a more enterprising, vigorous and diverse local economy that will attract new investment, enable local enterprise and entrepreneurs to be globally competitive and create more employment opportunities for local people.’

The scope of the Economic Assessment will be to undertake a robust and comprehensive review of Hartlepool’s industrial and economic landscape. This in depth review will require research into the current baseline position of the local economy in relation to a wide range of issues which will directly or in directly impact on the economic growth and vitality of the area. This assessment will consider the geographical area of the Hartlepool district and will pay particular attention to the changing industrial and business base, the demographics of the local population, skills requirements for the future, the regeneration of the area and the natural environment.

The purpose of the assessment will be to provide an analysis of the current factors which impact on the social, economic and environment development of the town. The assessment will offer a strength, weakness, opportunities, and threat (SWOT) analysis against the key area of ‘Business, People and Place’ and will identify where there are gaps in knowledge on specialist areas for example ‘skills requirements of employers.’ The key findings from the Assessment will inform and develop the Economic Strategy.

3.4 Initial Evidence Collation

Initial evidence collation has been produced through detailed reviews of national, regional, sub-regional and local policies and strategies including: -

National

- Voice of Small Business Annual Survey – Federation of Small Business (FSB) – February 2010
- Leitch Review of Skills – Skills Funding Agency (SFA) - December 2006
- National Skills Strategy – Department for Business, Innovation and Skills (BIS) – November 2009
- 21st Century Welfare – Department for Works and Pensions (DWP) July 2010
- Universal Credit: Welfare that Works – DWP – November 2010
- Building Bridges to Work: New Approach to Long Term Worklessness – DWP – March 2010
- Skills for Sustainable Growth – SFA – December 2010
- The Cost of Exclusion - Princes Trust – December 2010
- Local Growth – Department for Communities & Local Government (CLG) – November 2010
- Ending Child Poverty in a Changing Economy - Joseph Rowntree Trust - October 2010
- Monitoring Poverty & Social Exclusion - Joseph Rowntree Trust - November 2010
- Britain's Superfast Broadband Future – BIS – December 2010
- Mental Capital & Wellbeing for 21st Century – BIS – October 2008
- Bigger, Better Business: Helping Small Firms Start, Grow and Prosper – BIS – January 2011
- Financing Business Growth – BIS – October 2010

Regional

- Impact of Changing Funding Environment on VCS – Social Futures Institute – March 2008
- Regional Employability Strategy – One Northeast – February 2007
- Regional Tourism Strategy – One Northeast – April 2007
- Enhancing Financial Inclusion in Northeast – One Northeast – September 2009
- Regional Spatial Strategy – One Northeast – May 2007
- Regional Strategy for the Environment – December 2006

Sub Region

- Tees Valley Work and Skills Plan – Tees Valley Unlimited (TVU) – April 2010
- Major Skills Issues in Tees Valley – Social Futures Institute – June 2007
- Tees Valley Business Case – TVU – May 2006
- Tees Valley Economic Assessment – TVU – April 2010
- Development of Social Economy in Tees Valley – Social Futures Institute – September 2004
- Higher Level Skills in the Tees Valley – TVU – May 2010
- Tees Valley Employability Framework – Shared Intelligence – October 2007
- Tees Valley Climate Change Strategy – TVU – August 2007

Local

Strategic Needs Assessment – Hartlepool PCT – October 2009

- Local Transport Plan – Hartlepool Borough Council (HBC) – March 2006
- Community & Neighbourhood Renewal Strategy – HBC – August 2008
- Local Area Agreement – HBC – January 2007
- Local Development Plan – HBC – November 2010
- Children and Young People's Plan – HBC – October 2009
- Child Poverty Strategy – HBC – October 2010
- 14-19 Strategy – HBC – October 2006

To provide a complete picture of the economy researchers have worked closely with leading experts from the public, private and voluntary sector. The assessment has been compiled by working in collaboration with many partners including Hartlepool's Economic Forum, Tees Valley Unlimited and the Voluntary & Community Sector (VCS). As the assessment moves into the consultation phase further discussion will provide unique insight into specific areas from a range of diverse experts within their chosen fields. Evidence collation will improve as new lines of enquiry will be developed through consultation with all the major stakeholders.

3.5 GAP Analysis

What this assessment has predominantly outlined is that there remains gaps in knowledge on specific subject areas e.g. the resilience of the economy. Many of the questions raised in producing this assessment identified that the fragility of the global economy was not conducive in being able to make substantiated claims for the short, medium and long term prosperity of the town's economy. Due to the complexity of the global economy and how it will ultimately impact at a local level,

there will be different opinions by forecasters and experts on the findings of this assessment. Where there are proposed gaps in the analysis shown, partners will be invited to consider if there is evidence or where further research is needed.

3.6 Commission Additional Evidence

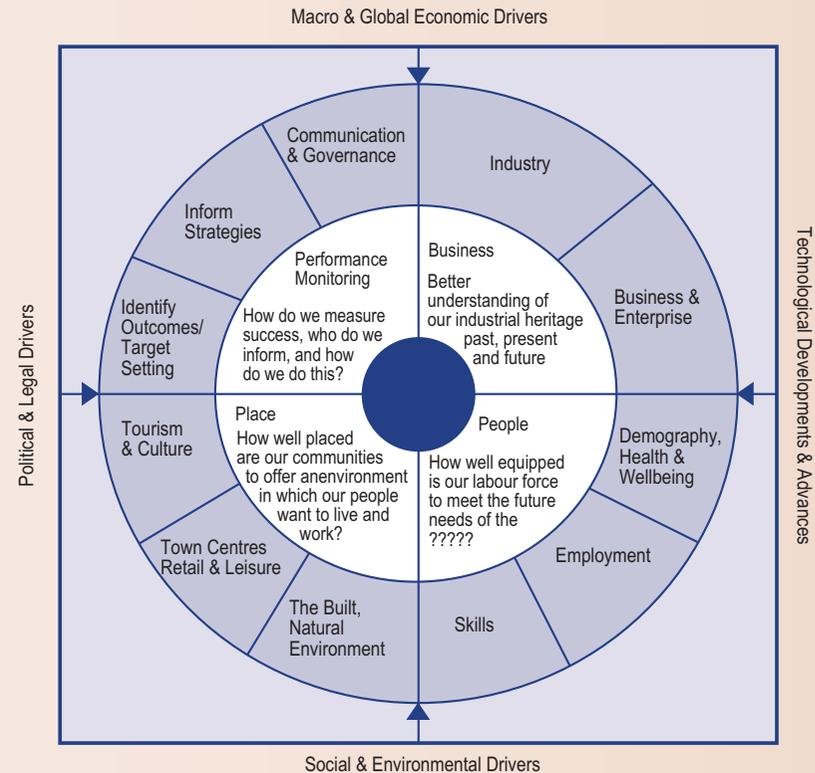
Where the assessment has shown gaps in the analysis, it may be that partners feel it is necessary to commission additional research on specific subjects in which to build a full evidence base. There are clearly gaps in this analysis which will need to be further explored so that a complete economic strategy is developed. There are questions that may be extremely challenging in which to gain a definitive answer, for example why do some communities suffer the effects of third and fourth generation workless households? This type of question whilst important to understand will require resources for the research to be undertaken which will need to consider all elements of a persons lifestyle including health, wellbeing, cultural background, skills, educational attainment, aspiration, ambition and environment. However, these challenges should not be ignored if the full economic picture is to be produced.

3.7 Review and Revision

The economic assessment will be reviewed and refined on a bi-annual basis. The commencement of the next revised economic assessment will be in July 2012 and the process to complete this document will follow the same process as outlined above. The assessment will formulate the Economic Regeneration Strategy for the town.



4.0 Hartlepool Economic Assessment Framework



The aim of Hartlepool’s Economic Assessment is to collect and evaluate data relating to local conditions which will improve the evidential base of partners to enhance strategies and operational plans which directly impact on the local area.

This assessment will identify the economic needs of the local area and will also outline where information is not readily available and where further research will be required to allow all partners to truly understand the ‘bigger picture’. As shown within the Economic Assessment Framework, the three key areas that will be considered is ‘Business, People and Place’ and under each heading an in-depth analysis will be undertaken to review the wider influences of a local economy - such as the global economic downturn – which has had a major impact on Hartlepool.

The assessment will provide the necessary baseline of information to ensure that there is more informed dialogue between all partners. Partners will be informing development of future strategies within the town. It is the intention that all partners will be consulted on this assessment so that all views and expertise is acknowledged and their contribution is included within the body of this document.

5.0 Background to Hartlepool

Hartlepool is located on the North East coast within the Tees Valley sub region and in 2009 had a total population of 90,900 people.¹ Of this, the number of working age adults within the town is 57,900 of which 28,600 are male and 29,300 are female and almost a fifth of residents are at or above retirement age.

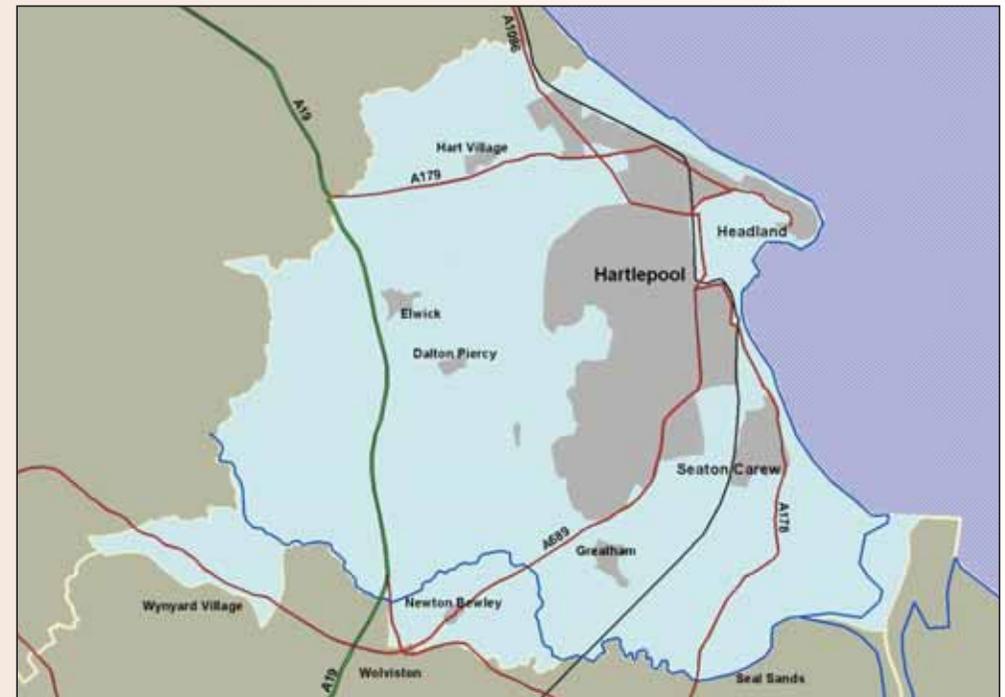
The town prospered as an industrial centre for many years until the decline in heavy industry such as ship building, steel fabrication and manufacturing in the 1960s and 1970s. Over the past thirty years the town's economic landscape continued to dramatically change with major job losses in these key industrial sectors and a move towards increased employment within a diverse business community and strong public and third sector.

Hartlepool has a long history of rising in the face of such adversity and as a result has become a much more diverse economy to meet the demands of the global economy. The town is now recognised as a major retail, service and manufacturing centre which significantly contributes to sub regional and regional economic activity. Expansions into international markets are also occurring through companies such as JDR Cables, Heerema, Huntsman, TERRC and Hart Biological which will benefit the wider economy. Alongside this, the town has transformed key regeneration areas in the past 20 years including the docks and specific employment land sites. The Marina and areas such as Queens Meadow Business Park are acknowledged as flagship initiatives with the former offering excellent office, housing and maritime tourism facilities and the latter providing improved business infrastructure facilities which have increased inward investment. Also the UK Steel Enterprise Innovation Centre and the redeveloped Hartlepool Enterprise Centre offer excellent start-up units which have increased the number of new businesses across the town.

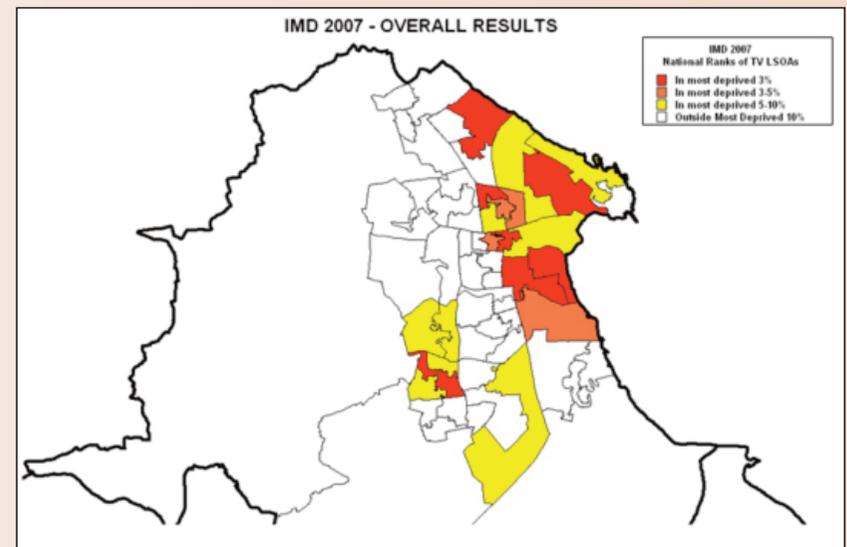
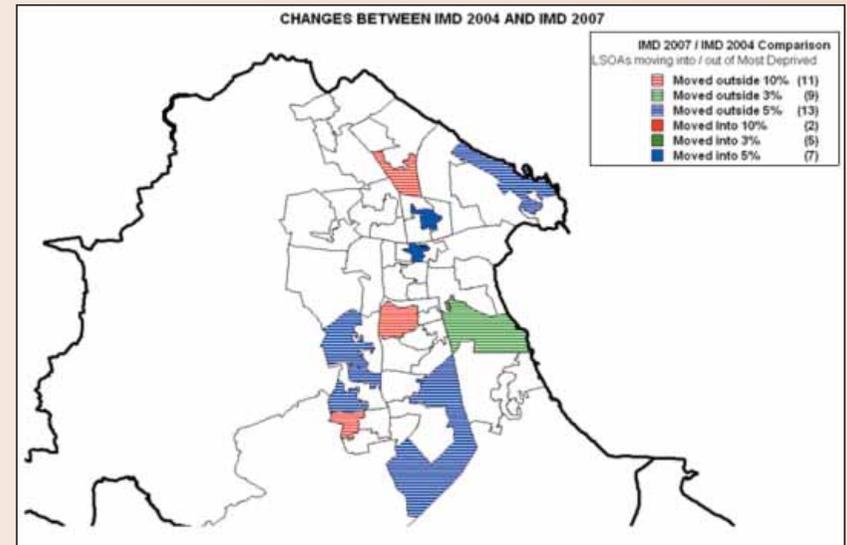
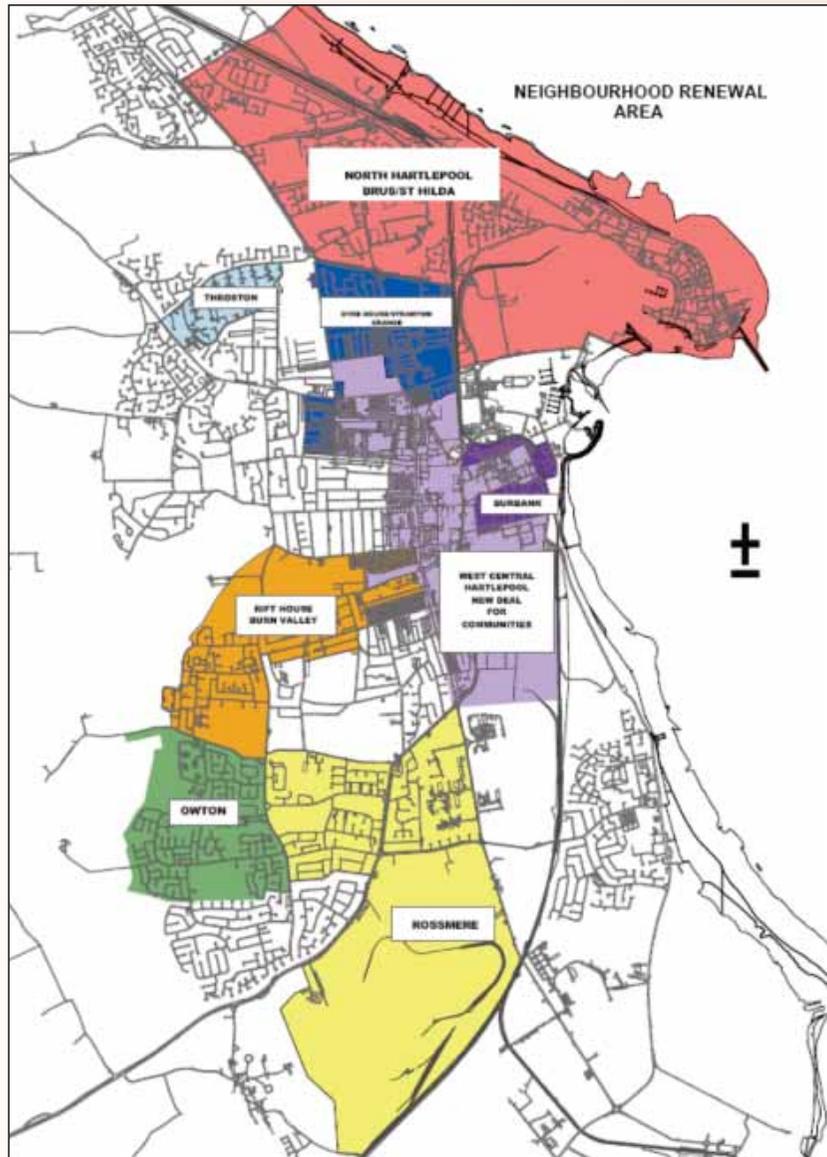
¹ All population figures are taken from Tees Valley Unlimited (TVU) estimates based on ONS population data and methodology

Advancements in business infrastructure activity have led to an increase in the number of new start up businesses and improvements in self-employment rates. Whilst this has provided the necessary mix of labour market opportunity for local residents, the local economy is still strongly influenced by the public sector - which currently provides a third of all employment. However, it is clear that in a time of renewed austerity there will be cuts to public and private investment that may restrict the growth of the economy and ultimately slow the employment rate. The town has also made great strides in tackling deprivation and the Indices of Multiple Deprivation (IMD) survey in 2007 shows that although Hartlepool was the 23rd most deprived of England's 354 Local Authorities, this improved from 14th position in 2004. Any major cuts in investment will impact on improvements made to the social, economic and environmental landscape of the area which will ultimately affect the poorest communities.

6.0 Map of Hartlepool



7.0 Hartlepool's Neighbourhood Renewal Areas



Originally, Hartlepool's 2002 Local Neighbourhood Renewal Strategy used the government's Index of Multiple Deprivation (IMD) 2000 to establish seven priority neighbourhoods within the town. The 2007 Index of Deprivation showed that some areas within the priority neighbourhoods identified in 2002 are no longer in the 10% most disadvantaged. However, because the way in which the Government calculates the index has changed significantly since 2000 and due to the long term vision of Hartlepool's 2002 Neighbourhood Renewal Strategy, those areas previously identified as a priority remained in the 2008 Strategy.

Alongside this, included within the 2008 list of priority neighbourhoods is Throston Grange – which is not in the bottom 10% overall, but is for the key themes of Employment and Health, Deprivation & Disability - bringing the total number of priority neighbourhoods to eight. These are):

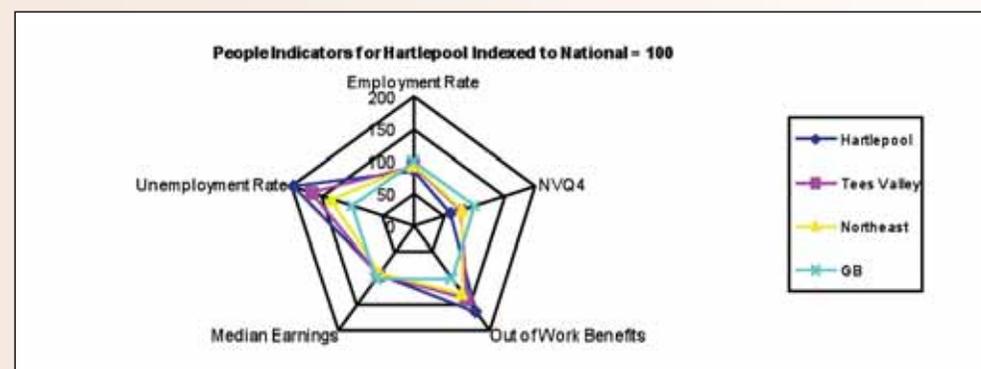
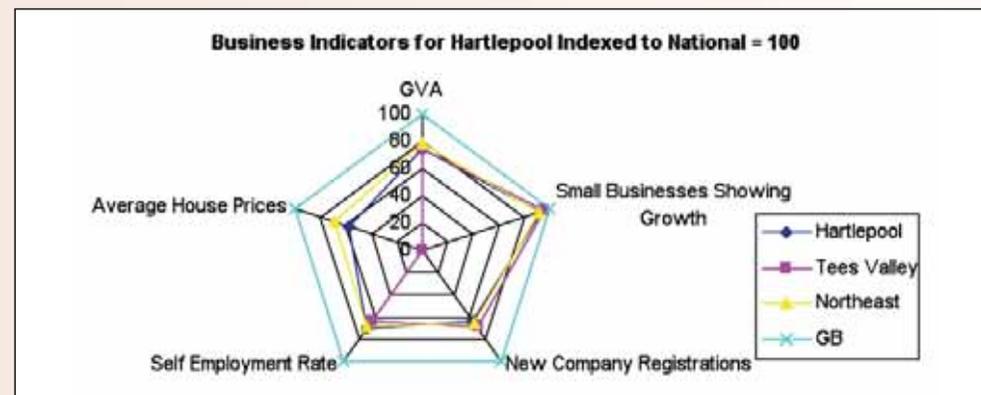
- Burbank
- Dyke House/Stranton/Grange
- Hartlepool NDC
- North Hartlepool (Central Estate, Headland & West View/King Oswy)
- Owton
- Rift House/Burn Valley
- Rossmere
- Throston

55% (just over 50,000) of Hartlepool's population currently live in these eight priority neighbourhoods; of the 17 wards, 11 fall within the Neighbourhood Renewal area. Of these, 11 NRA's fall into the 5% most deprived areas nationally. Of the 58 Super Output Areas in the town, 20 are in the 10% most deprived areas nationally, 11 of them in the bottom 5%.

8.0 An Economic Profile of Hartlepool

Over the past twenty five years, Hartlepool's regeneration and economic development activity has significantly improved the social, economic and environmental vitality of the town. The town is now a more enriched, vibrant and attractive area in which to live, work and socialise within and the improved infrastructure continues to encourage and attract major investment which will lead to longer term economic growth. Through this transformation, the town has

witnessed considerable success in tackling inequalities and social exclusion and within the past decade all of the above indicators were moving in the right direction to narrowing the gap to the regional and national average. Since the global economic crisis, there has been a major impact on local indicators and fragility within the economy remains. Whilst concerning, the change within the economic climate has provided opportunities to further assist indigenous businesses, invest in new technology and focus on growth industries which will ultimately lead to a sustained and viable economy.



Each indicator is an Index with the National figure=100. Gross Value Added - latest 2007; Average House Prices – latest 2008; Self Employment Rate – latest 2009/10; New VAT.PAYE Companies - latest 2008 (NI 171); Small Businesses Showing Growth – latest 2009 (NI 172); Employment Rate - latest 2009/10 (NI 151); Unemployment Rate – latest 2010; Median Earnings – weekly earnings by workplace latest – 2009 (NI 166); Out of Work Benefits - latest 2010 (NI 152); % working age with Level 4 - latest 2009 (NI 165)

9.0 Pre Economic Recession Journey of Indicators

Before the economic recession, Hartlepool was showing signs of real improvement as shown below.

| Indicator | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|--------|--------|--------|--------|--------|--------|--------|
| Employment rate (% of working age) ‡ | - | - | - | 64.1 | 65.6 | 64.4 | 64.3 |
| Unemployment rate (JSA claimants) (% of working age) † | 4.5 | 4.7 | 4.2 | 3.7 | 3.7 | 4.2 | 3.9 |
| Long Term Unemployed (% of JSA claimants) † | 42.1 | 37.1 | 33.1 | 30.8 | 33.9 | 36.2 | 31.2 |
| Working Age on Out of Work Benefits (%) | 24.8 | 24.2 | 23.2 | 22.0 | 21.5 | 21.1 | 20.8 |
| Residents with NVQ2 or Above (%) ‡ | 58.2 | 58.9 | 60.2 | 60.5 | 62.1 | 64.7 | 66.9 |
| Median weekly Earnings of Employees (£) | 321.50 | 333.10 | 342.90 | 346.60 | 375.70 | 396.10 | 388.50 |
| New VAT/PAYE Registrations* | - | - | - | 225 | 260 | 285 | 350 |
| VAT / PAYE Enterprises* | - | - | - | 1,650 | 1,730 | 1,830 | 1,985 |

Source: Labour Force Survey/Annual Population Survey; DWP; Annual Survey of Hours & Earnings; Business Demography ONS

* Consistent series begins with 2004 data; † Snapshot of claimants in September each year; ‡ Calendar year averages

Note on sources

Much data in this report is drawn from the Annual Population Survey and Labour Force Survey. These figures are extrapolated from survey results and, as such, are subject to a margin of error, which is not given in the text. Typical margins of error for Hartlepool would be around 1 percentage point, although they may be substantially higher where the number of interviewees in a particular group is small (e.g. the self-employed).

10.0 Key Findings

Hartlepool's Economic Assessment will provide the necessary evidence base to increase knowledge and better understand local economic conditions and to analyse how the town makes a significant contribution to wider sub-regional and regional functional markets. Understanding this wider scope of economic activity across multiple boundaries will provide an insight into the opportunities that the town could maximise and will also reflect the influence that global market failures have at a local level. It builds on the Sustainable Community Strategy, Neighbourhood Renewal Strategy, the Local Development Framework and the Local and Multi-Area Agreement.

This completed assessment will lead to an Economic Development Strategy which will respond to this needs assessment and which will identify:

- The authority's capacity and prioritisation in relation to economic development and regeneration interventions.
- Improved interventions to tackle worklessness, skills and enterprise initiatives
- Enhanced ways of working to develop commercial activity and business infrastructure;
- How it can improve local authority engagement with private sector partners; and;
- How the town will respond to the upturn and strengthen jobs and business growth in the long term through sustainable measures.

10.1 Business

Business Stock

- During the past decade, the number of businesses in Hartlepool increased substantially, reaching 2,425 in 2009. Much of this can be attributed to the large increase in the number of business births in this period, on which measure Hartlepool out-performed both Tees Valley and the North East. There were a number of policy initiatives during this period which contributed towards this increase in business numbers, including the Business Incubation System, with a hot house development at Queen's Meadow and an enhancement scheme at Brougham Enterprise Centre.
- During the economic downturn, both the total number and – in particular - the business birth rate fell. The new businesses formed in the previous years

proved to be relatively less resilient to the poor trading conditions than regionally or nationally. However, this may have aided the area, by removing the less competitive businesses, leaving a more robust business stock in the area; this is corroborated by evidence that median earnings of workers employed in Hartlepool businesses increased substantially in 2009.

- In addition, a number of major national businesses have collapsed (e.g. Woolworths, Garlands) or pulled out of the town, causing high levels of redundancies. As such, the business base in the area has declined sharply over the past two years – however, still it remains above the 2004 level, while the rate of business formation is currently similar to the 2004 level. As such, it seems reasonable that despite the declines of a recent past, the state of Hartlepool's business base and business birth rate is now in a much improved condition from the start of the decade.
- However, there remains a clear enterprise gap between Hartlepool (and indeed, the region as a whole) and the national pattern. The town has fewer enterprises per head of population and, despite recent improvements, a lower business formation rate.

Employment

- In employment terms, the overall employment rate of working age residents increased strongly in the period to 2006, peaking at 66.5%, halving the gap with the national rate. However, subsequent changes in economic conditions were accompanied by a steep fall in the employment rate, which stood at just 60.9% in the latest available figures (36,700 people).
- Although employment in Hartlepool's manufacturing sector has declined sharply, losing nearly one-third of its workers since 2004, it remains relatively more important to the town than in the country as a whole. However, the government's stated policy on supporting the manufacturing sector will benefit Hartlepool as it is well-placed to take full advantage of new markets due to its established manufacturing infrastructure.
- Employment in public services is relatively high, but will decline in the future and will continue to do so long term as a consequence of public sector funding cuts.
- The knowledge economy is under-represented in Hartlepool, with low numbers employed in the town within information & communication, finance and professional, scientific & technical activities. There is some evidence that more highly-skilled workers – i.e. those most likely to be employed in knowledge-intensive activities – are more likely to out-commute to jobs than those in lower

skilled activities, since the median earnings for Hartlepool residents (£486.40) is higher than the median earnings for employees working within Hartlepool businesses (£445.80).

- Self-employment is close to local and regional averages, in the order of 6-7% of the working age population (around 3-4,000 people). It has risen substantially since the early part of the decade, although remains well below national rates (around 9%). This again provides evidence of an 'enterprise gap'.

Productivity

- Gross Value Added (GVA) by Hartlepool & Stockton businesses per head of population is relatively low, standing at £14,370 in 2007, compared to a regional average of £15,460 and £20,430 nationally. GVA per employee is closer to regional averages, but still lags well behind the English average. These figures are the latest available, and do not take into account any effects from the recession.

Key issues facing business

- The key issue currently facing business is uncertainty, with a fragile global economy and significant public sector funding cuts underway, including the axing of major infrastructure projects. The direct and indirect, knock-on effects of these cuts will have a major effect on spending and business success, but it is difficult to predict the outcome with any degree of precision.
- Access to finance, especially for new businesses and SMEs, remains problematic, although the cost of lending is low if businesses can obtain it.
- The increase in the rate of VAT to 20% may weaken consumer spending.
- The skills available to business among Hartlepool residents are on a long-term upward trend, although this has stagnated somewhat in recent years. The challenge facing business is to make best use of those skills in order to drive up productivity, which implies upskilling the jobs available in Hartlepool i.e. increasing the local demand for higher level skills as well as the supply.
- The local workforce is ageing, particularly in key manufacturing sectors (e.g. engineering, where the average age is over 50), where the supply of young replacements tends to be insufficient.
- The cost of absenteeism among employees is high, with the North East among the most poorly performing regions. Hartlepool has been a pilot area for a programme to tackle absenteeism in the workplace, which, it is hoped, will see a reduction in these (and other costs) in the longer term.

- Strategies which businesses can adopt to deal with current issues include moving into new markets and efficiency savings.

Key Growth Sectors

- Nuclear: The nuclear sector - employs approximately 1% of the local working age population. Although the power station was due to be decommissioned from 2014 onwards, a five year extension has recently been granted and there is scope for the commissioning of a newbuild station in the town (with Hartlepool's site identified by the government as being one of eight areas being considered). Both of which will generate substantial employment and turnover in the borough.
- Offshore Oil & Gas: Offshore-related manufacturing is a key local specialism, with current provision to capacity. There is further potential to expand, particularly if increases in the price of oil make marginal fields more viable, but this would likely require development of the local supply chain,
- Offshore Wind: There is substantial potential to develop Hartlepool's existing engineering expertise to take further advantage of the opportunities in green power generation over the coming decade, particularly in servicing the Dogger Bank area of the North Sea. There are already facilities manufacturing components for wind generation, and land available for major inward investment opportunities.
- Low Carbon Economy: In addition to offshore wind, there is expertise in Hartlepool relating to other environmental-related areas which could be developed further, including processing of scrap and diversifying offshore wind skills and facilities into onshore wind.
- High Value Added Engineering: Engineering remains an important employer in Hartlepool, employing around 1,700 people. Given the variety of local expertise, it is well-placed to take advantage of component supply opportunities in a number of different growth areas, including new build nuclear and the low carbon economy.
- Knowledge Intensive Business Services (KIBS): Hartlepool currently has a low proportion of employment in KIBS, with the highest numbers employed in contact centres. There are opportunities for growth in this area and – in particular - in outsourcing, building on Tees Valley's good reputation, but other areas with higher skill requirements – finance and other professional services – require some development.
- Process & Chemicals: Like engineering, the chemical industry is a traditional

strength in Hartlepool, with high levels of investment and relatively high resilience to the downturn, given the supply chains in which they operate. It is also the intention of the North/South Tees Study to build on the opportunities identified within the report including carbon capture technology and biomass power generation.

- **Hospitality & Tourism:** This is an important sector, both as an employer in its own right, and in assisting wider development goals through supporting a higher quality of life, and encouraging recruitment and retention of inward investing businesses and higher skilled, higher earning workers. The sector has seen growth in recent years, in terms of visitor numbers and GVA, and development of attractions is ongoing.
- **Retail:** The number of retail businesses in Hartlepool has steadily decreased in recent years, to 335 in 2010, although the number of employees has increased, to 2,800. These trends are due to the development of larger – and in particular out-of-town – retailers, competition from the internet and, more recently, declines in consumer spending. Vacancy rates are high in some areas, but the core town centre remains a key retail hub for the area.
- **Health & Social Care:** The health & social care sector employs around 5,000 people in Hartlepool, with demand set to grow and diversify because of both the ageing population and changes to the structure of public funding (e.g. personalisation and GP commissioning). The future trajectory of the sector depends on how well the town's providers can respond to these opportunities.
- **Construction & the Built Environment:** During the past decade, the construction sector generally showed strong growth in Hartlepool, but has been hit hard by the downturn and the decline in the housing market. While this is now showing some signs of recovery, most major public sector building projects are now on hold or axed, leaving little potential for significant growth in the next few years.
- **Voluntary & Community Sector:** There are around 650 Third Sector (community, voluntary or social enterprise) organisations in Hartlepool, which contribute to local economic and social development in a variety of ways. With the Big Society agenda moving forward, it is envisaged that they will play an even more important role in the future, but will face a number of challenges including reduction and reorganisation of funding streams and increased competition to win tenders. Thought should be given to appropriate support for the Third Sector to move forward, including the development of consortia, most likely through the Hartlepool Voluntary Development Agency.
- **Environmental & land-based:** Given the lack of agricultural land in Hartlepool, this is a very small sector, with limited growth potential.

10.2 People

Demographics

- The population of Hartlepool has been steadily increasing over the past decade, and now stands at 90,900. This change has been driven by older age groups, with the number of under-16s actually declining, and forecast to change very little in the the next 20 years. The number and proportion of retired people, however, is forecast to grow strongly, with an additional 8,000 over-65s anticipated by 2030. This may have significant consequences for the business community, if there are insufficient entrants to the labour market to replace retirees.

Ethnicity

- The British Minority Ethnicity population in Hartlepool has been increasing over the past ten years, from 1,030 to 1,700 (1.9% of the population) according to official estimates. This may be an under-estimate – experimental statistics indicate that 2.8% of the population fell into BME groups in 2007, and local household surveys report up to 8% of the population in BME groups.

Health & Wellbeing

- Hartlepool's level of health & well-being is relatively poor by national standards. The standardised mortality ratio is high – death rates are 26% above what would be expected, and 35% higher for under-75s. Life expectancy at birth is 2.6 years shorter for men and 3.7 years shorter for women than the national average. Early deaths from cancer and, in particular, circulatory diseases are disproportionately high (in the latter case, 30% higher than national rates). The proportion of the population claiming health-related benefits is higher than national or regional figures, as is the prevalence of unhealthy lifestyle risk factors e.g. smoking, binge drinking, obesity, misuse of drugs. The mental health of the population is also relatively poor, with 47.7 adults per 1,000 population claiming mental illness-related benefits, compared with 27.6 nationally, with referrals rising substantially in the last year.

Financial exclusion

- Financial exclusion in Hartlepool is high. Just under half of all households have a poor credit rating, placing Hartlepool in the bottom 50 local authorities in the country. Citizens Advice Bureau centres report that 85% of recent enquiries have been related to money or debt. The formation of a Financial Inclusion

Partnership has begun to address these challenges, both directly through increasing access to more affordable forms of credit and face-to-face advice and indirectly through information guides and roadshows.

Child Poverty

- In 2007, 5,000 children (30%) in Hartlepool were classed as living in poverty, far higher than the North East (24%) or England (22%). There is now a Child Poverty Pledge and Strategy and a Town Wide Child Poverty Action Plan which is tackling the problems, along with eight children's centres to help families with children under five.

Economic activity and worklessness

- The number of economically active adults grew from 38,900 in 2004 to 43,100 (74.4% of the working age population) in 2007, exceeding the North East rate but still well below the national rate. However, the level of economic activity subsequently decreased sharply, with only 41,000 adults (70%) classed as active in 2009/10 the lowest in the Tees Valley area and 6.4 percentage points below Great Britain. In particular, rates have seen a much sharper decline among women than men, from 69% in 2007/08 to 62% of women in 2009/10. This is at odds with the performance of female activity rates nationally, which have remained static.
- Some 17,500 adults in Hartlepool – 30% of the working age population – are currently classified as workless, well above the rates in the North East (27%) and nationally (23.5%). Similarly, 9,000 households were classed as workless in 2009, 28% of all households in the town.
- Unemployment (measured using the Jobseeker's Allowance claimant count) reached a low of just over 2,000 people in May 2005, following a long period of improvement. However, subsequent large-scale redundancies and the economic downturn have pushed the claimant count to 3,993 in October 2010, nearly double the level of four years earlier. In addition, the proportion of claimants who had been unemployed for six months or longer, which had been on a long-term downward trend, increased substantially in 2009-10, from 26% to 43%, although this spike was relatively short-lived – the current proportion of long-term unemployed is 33%.
- The number of adults claiming out-of-work benefits decreased steadily between 2000 and 2006, reaching a low of 11,360 (20% of the working age population), although the rate remained well above the national claimant rate (around 11%). The number has subsequently increased, although not greatly, reaching 12,500

in 2009-10 (21.7% of the working age population).

- There are geographical disparities within Hartlepool, with the worst performing wards recording substantially higher levels of worklessness and benefit claims than the borough as a whole. In five wards, over 40% of adults are workless.

Vacancies

- As of June 2010, there were 616 unfilled vacancies advertised for Hartlepool by Jobcentre Plus (representing around 30% of all vacancies in the area). This implies that there were 51 workless applicants who could apply for each advertised position. In order to reach those furthest from the labour market access vacancies, Hartlepool Works has been established, bringing together a consortium of employment, training and specialist providers.

Incapacity-related benefits

- Just over 6,200 adults claimed some form of incapacity-related benefit in May 2010, equivalent to 10.8% of the working age population, well above the rates in both the North East (8.6%) and nationally (6.5%), although this gap has narrowed substantially as the number of claimants has decreased. The majority (4,080) have been claiming for five years or longer. Some 2,000 claimants are aged 55 or over, and therefore outside the measures introduced to move claimants into work.

Youth unemployment

- Approximately 1,900 people aged 16-24 were classed as unemployed in the latest survey figures available. This is somewhat higher than the average for the past five years, which has typically been between 1,000-1,500, often spending short periods unemployed between similarly short periods in employment. In addition, there are currently 1,185 18-24 year olds who are unemployed. Among 16-19-year-olds, people were not in employment, education or training (NEET); the annual average NEET rate of 8.2% is below the North East rate (9.7%) but higher than nationally (6.9%). The typical period spent NEET is short, but around 1% of this age-group are classed as long-term NEET. Support has been available to the young unemployed through the Future Jobs Fund – the Hartlepool programme has been nationally recognised for its success – but this will end in 2011, with the similarly successful Going Forward project also coming to an end. This leaves a gap in provision for young unemployed people, which may be met if a bid to the Skills Funding Agency is successful.

Skills – young people

- After lagging behind national and regional trends in GCSE performance, in 2008/09 599 Hartlepool pupils (48.7%) achieved 5 GCSEs at A*-C including English and Mathematics. This was slightly above the North East rate (48.1%) and had substantially narrowed the gap with the English rate (50.1%), making the joint greatest improvement of any local authority. Attainment of this standard by the 230 pupils eligible for free school meals has also risen, with 57 pupils reaching it (24.8%). Achievement in science-related subjects is relatively poor, however, with only 49.1% gaining two good science GCSEs, compared with 54% regionally and nationally.
- The proportion of 16-year-olds studying in Hartlepool attaining any Level 2 qualification was 69.8% (869 people) in 2008/09 – well above the national rate of 63.9%, and on a steeper upward trend than nationally
- Attainment of Level 3 qualifications by age 19 is somewhat poorer. By 2008/09, 535 19-year-olds had attained this level; the rate of 43.3% is well below the national rate of 51.4%. Progression to Level 3 is clearly challenging, although the increase in attainment at Level 2 at 16 in recent years bodes well for future increases in attainment of Level 3.
- Only 65% of 16-17-year-olds were still in full-time education in 2008, compared with 75% nationally. This is the lowest proportion of any North East authority, while the proportion in work-based learning (13%) was the joint highest. Framework success rates at Hartlepool College are in line with national averages, at 69%. The College also has high success rates with E2E provision, with 76% of leavers progressing to a positive destination, among the highest in the region.
- The launch of a wide range of new vocational Diplomas approved by the 11-19 Partnership aims to raise attainment further and offer better routeways into FE, HE and employment. There are also ongoing major redevelopments to a number of schools and colleges throughout the borough, including some new builds, to deliver higher quality facilities and aiming to improve participation and attainment rates.
- Applications from Hartlepool residents for full-time undergraduate courses have risen substantially – by nearly 50% since 2007 – to reach 722 by 2009 (4.3% of the 18-29 age cohort), of which 602 were successful. The success rate since 2000 has fluctuated but has been in line with North East averages, at over 80%.
- Hartlepool has one of the highest proportions of HE entrants using provision other than full-time undergraduate courses, amounting to 936 out of the 1,485 who entered HE in 2008/09. This is equivalent to 63% of entrants, well above

the regional rate of 54%.

- A high proportion of HE entrants to full-time undergraduate courses are from a deprived background- 50% of acceptances in 2009, against 44% regionally.

Skills – adults

- Average skill levels among the working age population steadily increased between 2000 and 2007, but have since shown few signs of growth, and even some decline. The number with no qualifications reached a low of 9,300 (16.6%) in 2007, but has subsequently risen to 10,700 (18.3%), well above the regional and national rates. Similarly, the number with Level 3+ skills grew to 24,200 by 2007 (43.6%), but then declined slightly. Currently, the numbers are growing again, but broadly in line with population growth, meaning that the proportion holding this qualification level has been relatively static, at just over 18%. This is the lowest proportion in Tees Valley, and well behind North East and GB rates.
- Local intelligence on skills will be increasingly important in the future as funding is devolved to a local level and reporting by official bodies is only available regionally. This will require consultation with local stakeholders, including providers and employers, to gain a rounded picture of skills supply and demand.
- The Audit Commission has reported that the Council provides a good service for developing skills in the area, engaging businesses and residents well, but the recent decline in the business base and low future growth forecasts may cause difficulties for further progress on skills in the short- to medium-term. In particular, SMEs need to engage more with the training system, and competencies at high skill levels developed on-the-job should be accredited with relevant qualifications.

Skill needs in key sectors

- There are a number of skill needs which cut across many Hartlepool employers and sectors. These include: upskilling the workforce generally, and ensuring that there is a supply of skilled and motivated work-ready young entrants to replace the ageing workforce; management, leadership and strategic skills; ICT skills across all users, not just in ICT-related occupations; technical and high level engineering skills in key manufacturing sectors; customer service, communication and team working skills. In addition, as shown by Future Jobs Funds recruits, there are many returners to the labour market who require pre-entry mentoring and coaching and significant in-work support to sustain them in employment, which employers feel should be a responsibility of JCP and other similar providers, rather than a burden on the employer.

- **Nuclear:** if Hartlepool is chosen as the site of a newbuild nuclear plant, it is forecast that this would generate 12,000 construction jobs, 5,000 in operations and 1,000 in manufacture. The majority of these (just over half) would be at technical or craft level, with rest roughly evenly split between Level 4+ and lower levels. With this level of demand, especially at higher levels, there is a risk that poaching of trained staff from other employers could create skill shortages elsewhere in the economy. SMEs are currently reluctant to commit to training without an indication of how definite the prospect of the work coming to Hartlepool is, creating the risk that they will lose out on the opportunity to enter the supply chain, which may be dominated by larger employers.
- **Offshore Oil & Gas:** future growth and employment and skill demands are intrinsically linked to the price of oil as supplies dwindle. If marginal (smaller and more complex) fields become viable, Hartlepool businesses can build on their expertise and expand and diversify to serve them. Local skills gaps include an ageing workforce (requiring local promotion of national schemes to encourage young entrants), and management skills which will be required to pursue an aggressive diversification agenda.
- **Offshore Wind:** The sector is forecast to grow strongly, but this creates the risk of skill shortages, especially if businesses poach workers from areas which already have a comparatively experienced workforce, such as Hartlepool. There is already a substantial amount of training available locally, and employers are expanding productive capacity and employment, leaving the town well-placed to respond to the predicted growth in demand. Hartlepool College of Further Education has also invested in a new training facility which offers specialist training to respond to the industry and renewable energy opportunities for the future.
- **Low Carbon Economy:** In addition to skills for nuclear and offshore wind, Hartlepool is well-placed to use its existing workforce expertise to diversify into other low carbon energy sectors, in particular onshore wind. Training in other sectors – notably construction – needs to incorporate awareness of low carbon and energy-saving techniques.
- **High Value Added Engineering:** In general, the local sector requires stronger management and business improvement, and upskilling more workers from Level 2 to 3+. Engineering training is a recognised strength of Hartlepool College, and curriculum development is aligning training provision with wider sectoral developments.
- **Knowledge Intensive Business Services:** The largest sector locally is contact centres, which are already well-served by the training system. Skills provision in other sectors relies on engaging SMEs in training, and encouraging the adoption of national standards for career development and the development of more flexible delivery methods of training. In addition, the outsourcing sector is likely to develop further, requiring additional training provision in this area.
- **Digital Media:** The digital media sector in the North East is relatively small and underdeveloped, with only computer games and interactive media forming significant clusters. Skill shortages tend to be sector-specific and technical, requiring higher level entry qualifications and development of apprenticeship routes; since entry is often via word-of-mouth, this can be difficult in an area with underdeveloped clusters and networking, driving ambitious young people elsewhere to find employment. Locally, the Teesside Media Academy provides specialised training, while careers advice in schools is viewed as lacking in relation to the sector.
- **Process & Chemicals:** Given the product make-up of the local chemicals sector, it is likely to be fairly resilient to the downturn, and businesses are, on the whole, satisfied with training provision. However, delivery could be more flexible in terms of content and location by FE and HE providers. Hartlepool College also has a Centre of Vocational Excellence which works closely with local employers to address skill gaps and upskill and accredit the skills of the existing workforce. Another challenge for the industry is the ageing workforce and efforts by the industry and the Sector Skills Council have been made to create enhanced numbers of apprenticeships within this field.
- **Leisure, Hospitality & Tourism:** The key issue in this sector, dominated by SMEs, is the development of leadership and management skills, with customer service skills also in need of development. Locally, there are indications that skills gaps in both these areas are growing, with very few employers accessing publicly funded support. In addition, skilled food preparation staff are in short supply. Hartlepool College is responding by increasing apprenticeship numbers and courses, and working with careers advisors to more effectively promote the sector.
- **Retail:** Retail staff tend to have low qualifications levels, with over half of all North East retail managers not holding an NVQ3. Management, sales and customer services are key skill gaps, as are – increasingly – ICT-related skills. Skillsmart's Location Model could be used to develop skills in a number of retail outlets within a local area.
- **Health & Social Care:** The main skill gaps currently identified by the SSC are sector-specific technical skills and customer service, although forecasts of future growth and changing skill needs are complicated by the restructuring of public

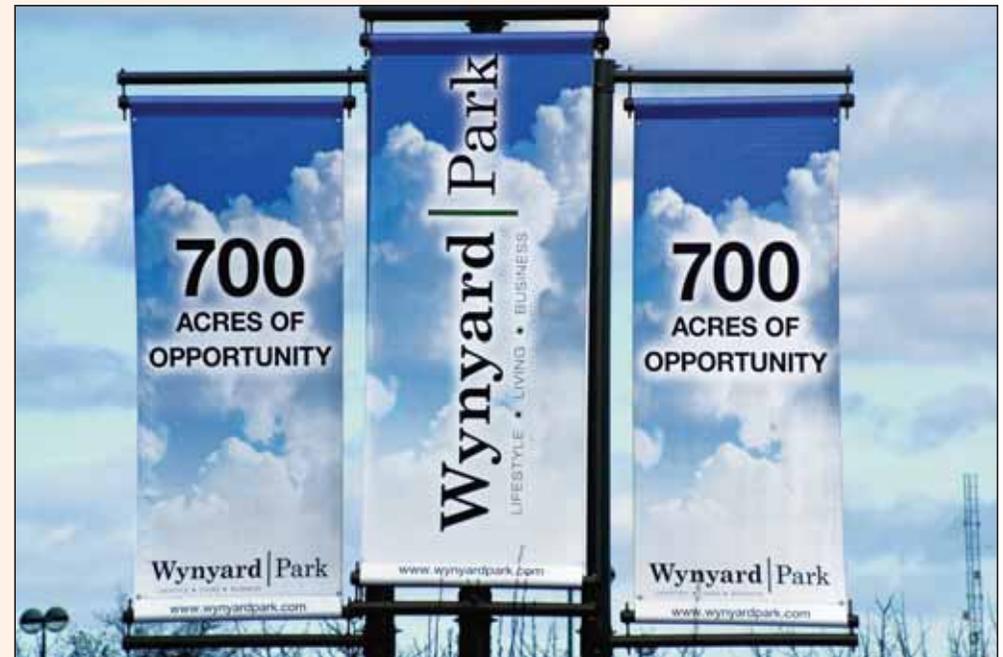
sector funding arrangements. Locally, skills development needs to take account of the health challenges faced by the town, and in particular aim at reducing the level of lifestyle risk factors among the population. Within care, the workforce need to work towards the minimum qualifications standards set down by the government, which they are currently some way from meeting, particularly in the private sector. Hartlepool College offers a full range of relevant qualifications, and is expanding the number of apprenticeships in response to this.

- **Construction & built environment:** The construction industry in the North East has been affected significantly by the current economic climate, with employment decreasing from 124,860 in 2008 to 97,810 in 2010. It is forecast that employment will grow again slowly, with an annual recruitment requirement of 3,190 (mainly replacements for retirees) across the entire region. As such, growth in employment in Hartlepool will be extremely limited, with the main focus being to train sufficient new entrants to replenish the workforce. Traditional training needs to be supplemented with techniques based on new technologies, particularly those related to the low carbon economy.
- **Environmental & land-based:** This is a very small sector in Hartlepool, and opportunities for development are limited. It may be more worthwhile to encourage residents to obtain training for jobs outside the town, which could be used as the basis for them setting up their own business at a later date.
- **Voluntary & community:** The 7,500 volunteers in the 650 third sector organisations in Hartlepool are estimated to be equivalent to about 600 full-time jobs. Although employees tend to be highly skilled, there is a key shortage of skills related to dealing with volunteers, while skills related to leadership, general business administration and measurement of impact all need development. Future growth predictions are complicated by uncertainty surrounding the new public sector funding arrangements – in particular since many organisations provide social care – and the forthcoming Big Society reforms. Recommendations include the incorporation of training costs in commissioning arrangements and more flexible, innovative delivery methods (e.g. e-learning, consortia and secondments).
- The third sector also contributes towards skills development and worklessness alleviation through outreach and community support, providing experience through volunteering (to be formalised through Work Clubs) and reinvesting in local communities. With the ending of existing funding streams and the onset of the Work Programme, thought needs to be given to how the work done in the third sector can continue, and in particular how the Council can work in partnership and consortia with third sector organisations to bid to new funding streams.

10.3 Place

Regeneration

- Future regeneration investment will be focussed in the Regeneration Action Zones, a number of which are also part of the Tees Valley Coastal Arc Strategy, which is the focus of regeneration in the wider local area. These investments aim to improve both economic development and tourism and the visitor experience – for example, a coastal path and cycleway.
- Important regeneration projects include: the wind power development at Victoria Harbour; tourism developments at The Headland, The Marina and Seaton Carew; and a variety of premises and estates for commercial activity in the Southern Business Zone and Wynyard Business Park, including the possibility of new hospital if alternative funding can be found (given the cancellation of central government funding for the project).
- In addition, there is investment in housing market renewal around the borough, including social housing; improvements to the fabric of educational institutions; and possible refurbishment of the town square.



- However, these plans may be altered by the changes in the planning system proposed by the new coalition government, which will devolve more power to local communities to make their own decisions, in collaboration with the local authority.

Household growth

- It is forecast that, primarily due to the growth in single person households and the ageing of the population, approximately 5,400 new homes (gross) will be needed in Hartlepool in the next 15 years, equivalent to a net addition of 320 per annum. This comes from additions to existing housing areas and development of Greenfield sites on the urban edge and on urban Brownfield sites.

Housing stock

- There were just over 39,000 occupied dwellings in Hartlepool in 2007, and around 2,000 vacant properties (of which 620 were due for demolition) and a small number of second homes (300). This represents a vacancy rate of 4.7%, above the national rate of 3%, although it was substantially higher in some wards due to the poor quality of the housing stock. The scheduled demolitions have now been carried out through the Housing Market Renewal Programme, which is still ongoing.
- Demand for new homes exceeds supply across Hartlepool, including for rented accommodation, with long waiting lists for social housing; in some areas, people may turn to the private rented sector where social housing is unavailable. Executive homes comprise only 3% of the housing stock, and development is needed in this area, particularly if economic development aims of upskilling the population are to be met.
- Demand among newly formed households is strongest for family homes (2-3 bedroom properties), with much lower and falling demand for apartments – many newly developed complexes have high vacancy rates.
- There is a shortfall of 393 affordable dwellings per annum, implying that meeting the need among certain groups for affordable housing is a key priority. This can partly be achieved through enforcing a minimum proportion (10%) of affordable housing on new residential schemes, part-funded by national support schemes. The New Homes Bonus announced by the coalition will also aid in developing the housing stock as required.

Fuel poverty

- In 2009, fuel poverty (spending over 10% of household income on total fuel use)

is likely to be a major problem in Hartlepool, given the high rate of benefit claim. To counter this, in addition to national schemes, the town has developed a Winter Warmth Campaign which, among other initiatives, will provide home safety checks and give out advice on energy efficiency .

Broadband

- Broadband availability and speed is generally good with some exceptions, and will improve substantially when the pledged introduction of superfast lines by the coalition government is accomplished. No data is available on the proportion of households or businesses in Hartlepool which are online, but increasing this rate, and supporting business owners and residents to make best use of broadband is a clear policy direction.

Transport

- Improving local connectivity is seen as a key priority for Hartlepool. While the current road network is effective, transport flows have increased to the point where the network is near capacity, and forecasts indicate increasing congestion and poorer environmental conditions due to increased traffic flows. As such, meeting the increased demand in a more sustainable way is necessary.
- The identified issues to take into account are: increasing car ownership and dependence; increased volumes of traffic; unreliability of public transport and freight journeys; changing spatial employment patterns; and the growth of the population. Initiatives to remedy the problems include: promoting more sustainable travel (walking, cycling, public transport); educating the local population about smarter transport choices; controlling parking provision; maintaining roads; and increasing capacity of junctions.
- The lack of a single commercial centre in Tees Valley creates difficulties for the public transport system. To counter this, there are proposals to create a new £140m metro system (which was not cut in the Comprehensive Spending Review) linking, in its first phase, Darlington to Tees Valley Airport and on to Saltburn, with future phases dependent on funding. In addition, initiatives improve local bus networks include: buses being given priority on a number of routes; rolling out real time passenger information provision; simplifying and improving ticketing and fares; marketing and promoting bus usage,
- Rail and air links are both highly important, with Hartlepool being served by the Durham coast line providing links to Newcastle and the Grand Central Line direct to London, compensating for the loss of direct air links. Nearby Durham Tees Valley Airport is seen as a key driver of the local economy, with its planned

expansion contributing further to economic development and regeneration.

- In total, 67% of residents work in Hartlepool, with 33% commuting out to work, mainly to neighbouring local authorities. This equates to approximately 12,600 people out-commuting, with 9,300 in-commuting (again, mainly from nearby local authorities). On balance, this implies a net outflow of just over 3,000 commuters.

Business sites

- There is a limited range of high quality accommodation for businesses available within Hartlepool, which have been extensively developed and refurbished through a partnership of public and private investment. In total, there are 185ha of key employment locations, 158ha of land for general employment and 29ha restricted for port-related usage. To meet future demand and remain competitive, the town requires 210ha for general employment and 135ha for key employment locations. This implies that there is an oversupply of large premises, particularly factories, and the need to replace the older stock with modern, smaller units. The market for offices is concentrated in the town centre and marina, and any new private sector development is likely to require public sector subsidy.



Town centre, retail and leisure

- The primary retail stock in the town centre has reasonable occupancy rates (although retail vacancy across the town is higher than the regional average), and the retail offer is generally seen as good and varied, with both town centre and out-of-town shopping and leisure opportunities. Sporting activities are much improved, with a range of leisure centres, golf courses and professional sports clubs. The market hall was used to pilot a self-employment scheme,

which saw footfall increase by 18% and is likely to be extended.

- The tourism and visitor offer is worth nearly £50 million per annum and is much improved over the past decade, and includes a marina with a range of attractions, bars and restaurants; historical sites on The Headland; beaches and wildlife at Seaton Carew, Seal Sands and Saltholme; public art and museums; outdoor recreation, and large-scale public events. However, it is seen as relatively inaccessible, with little 'passing trade' – visitors need a reason to visit.
- The 18 hotels and guesthouses, mainly small and lower grade, offer 348 bedrooms, catering primarily for the contractor market. Weekend occupancy tends to be relatively low, but higher in summer, with the main source of business being summer weddings, family visits and attendance at events (mostly football). Future projections forecast at least a continuation of the current level of the contractor market, with development opportunities identified as budget hotel and possibly upper tier hotel development; upgrading of existing 3* hotels; additional self-catering facilities; and planning permission for new developments at Elwick Services and Trincomalee Wharf. These developments are supported by the Hartlepool Hotels Group, a forum for accommodation providers.
- The night-time economy has seen increased business, particularly in the Marina area, and is seen as a key sector to contribute to economic recovery. Work is ongoing to promote this offer and make Hartlepool a key visitor destination.
- While the downturn may have affected spending in parts of the visitor economy, it also offers an opportunity for the town to increase the number of day visitors, as families cut back on expensive holidays,

Natural environment

- Tees Valley has been a national leader in maximising value from waste, but this has been affected by the collapse in the price of recyclables during the downturn. In response to this, the Council are reviewing methods of processing waste to produce power or fuel, and minimising the level of household waste (and in particular the amount which cannot be recycled). A 'green' shop will be opened to encourage purchases of environmentally-friendly and re-used products.

Hartlepool is well-placed to take advantages of the economic opportunities offered by the move towards a low carbon economy, in particular supporting the use clean technologies in local heavy industries and developing the supply chain for wind and marine energy. The forthcoming Climate Change Adaptation Strategy will also include a full risk assessment of vulnerabilities to weather and climate change.



Wellington House

