Partneriaeth y Gororau Ymlaen
Marches Forward Partnership

Annex 1

Evidence Base

February 2025

Herefordshire Council
monmouthshire sir fynwy
Powys
Shropshire Council

Shared challenges and opportunities

- We have **nationally recognised natural and heritage assets**, good connectivity to and from nearby core cities and the opportunity to specialise in **key local sectors, including food, tourism and energy.**
- However, we have **high housing costs** resulting in reduced disposable income and economic activity.
- There is relatively **weak within-region public transport connectivity,** which weakens economic activity and creates economic exclusion.
- We have a **rapidly ageing economy** in a significantly rural area. This means there are significant challenges with an **expensive infrastructure and service provision** for some of our most vulnerable residents.
- We have a **major agri-food sector** but a low proportion of higher value service sector jobs.
- We have significant overall challenges in terms of the critical physical infrastructure required to drive economic productivity and deliver new housing.

Interventions

A High Productivity Rural, Small Town and City-based Economy

We are a significantly rural part of the United Kingdom.

Herefordshire and Shropshire are classed by the Office for National Statistics (ONS) as largely rural authorities, the most rural definition of rurality on a seven point rural-urban classification scale of all local authority types in England[i].

Similarly, Welsh Government identifies Powys and Monmouthshire amongst its list of rural authorities[ii].

Powys is the most rural authority in Wales, and the second most rural authority (in terms of population density) in all of England and Wales. All four local authorities are among the 10% most rural in England and Wales[iii].

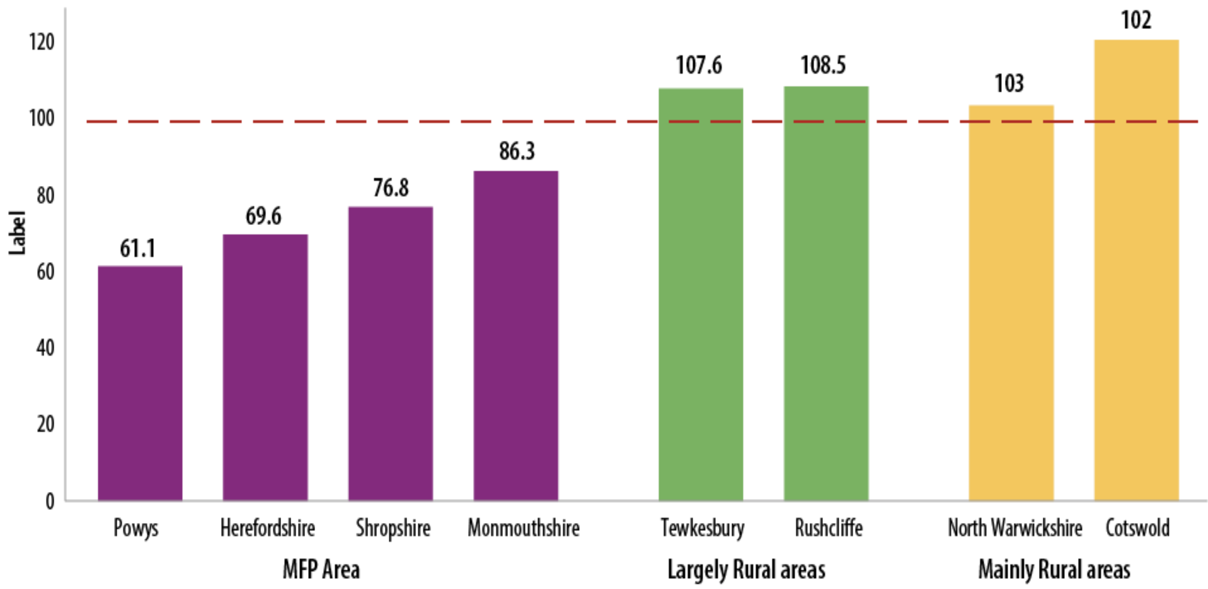
This is a fact worth noting because it has been discussed widely in economic development literature that rural areas face distinct challenges for achieving growth and prosperity compared to predominantly urban areas[iv]. To this extent, the UK government has developed specific strategies to drive productivity improvements in the UK economy, including as part of the 2015 *Fixing the Foundations* productivity strategy[v], and more recently as part of the levelling up policy agenda[vi].

The challenge for rural authorities is that they lack the some of the attributes of urban areas which are typically associated with higher productivity. These are the effects of agglomeration economics, which are created through denser labour markets that encourage investment, specialisation, clustering, and knowledge-sharing within specific areas.

From a productivity perspective, all four Marches local authorities lag the UK average for output per hour worked by employees, with Powys experiencing the second lowest level of gross value added (GVA) per job filled in the UK and Herefordshire the 26th lowest out of 360 unitary authorities[vii].

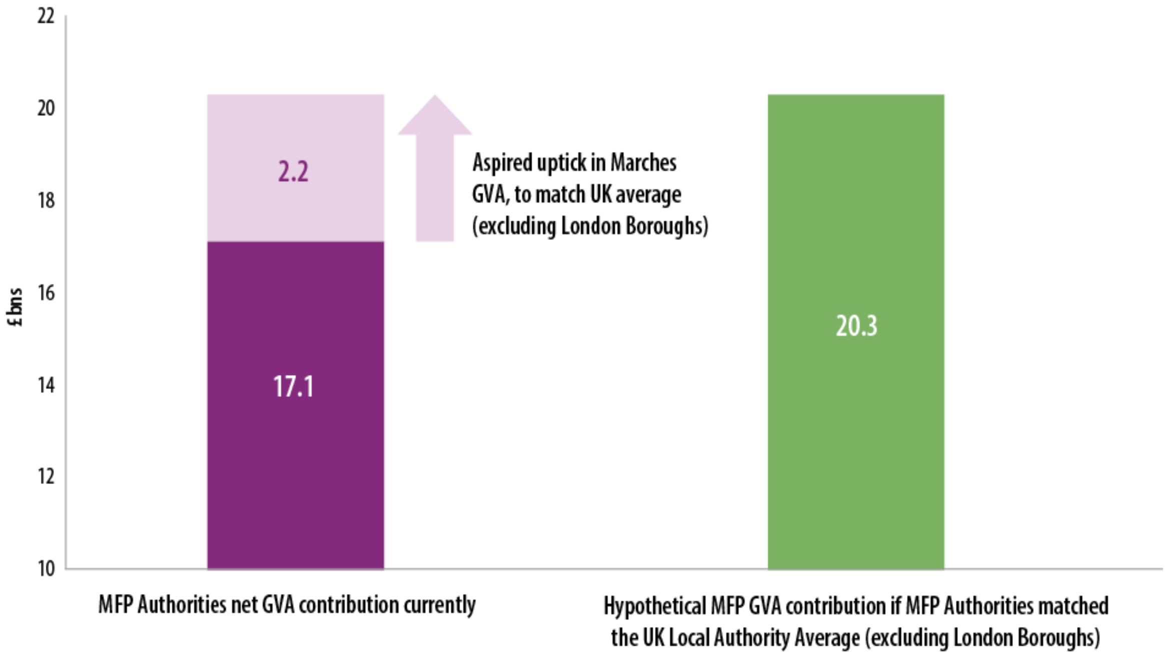
However, being rural does not by definition mean that an area needs to suffer with lower productivity. There are many examples of local authority areas in the UK classified as largely rural and mainly rural, including outside of the (relatively high productivity) southeast of England, which have productivity rates above the UK average, as shown in Figure 1 below.

Figure 1: Index of GVA per worker by Marches Forward Partnership local authorities and selected other rural authorities (outside south-east England), 2022, UK = 100



One of our key propositions aims is to drive an uptick in productivity across the Marches Forward Partnership (MFP) area. As shown in Figure 2, if the Marches area was to grow its GVA per worker to match that of the average level in England and Wales (not including London Boroughs which typically have higher levels of GVA), then this would add £3.2bn annually to the national economy.

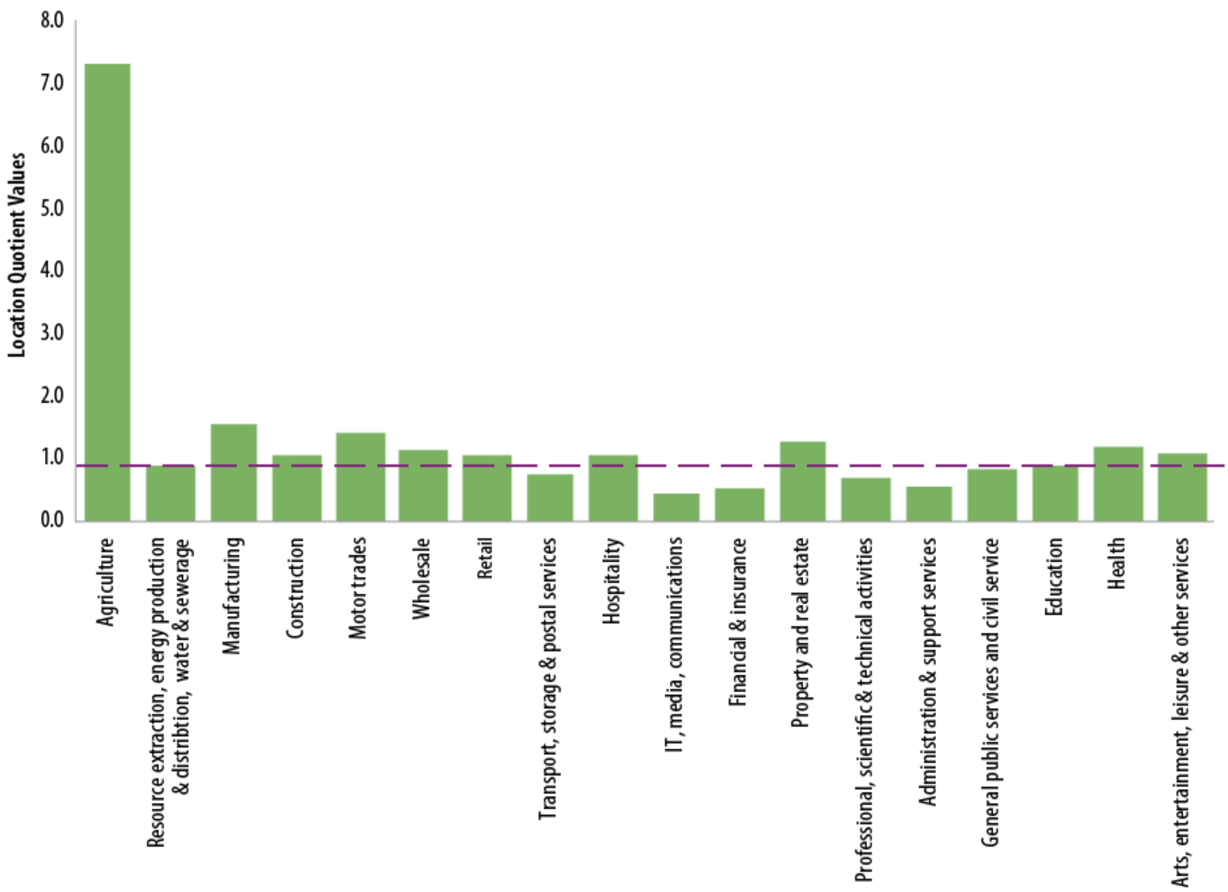
Figure 2: MFP area current GVA per worker total contribution (£bns) and a hypothetical uplift scenario in which the MFP area matches UK Local Authority average GVA per worker (excluding higher GVA London Boroughs)



A feature of all the MFP authority areas is a high proportion of rural jobs and residents, with interspersed small and medium sized market towns[1]. As shown in the location quotient diagram for the MFP area in Figure 3 below, there are proportionally over seven times the number of jobs in agriculture in the Marches area compared to an average local authority in England and Wales. Additionally, there are a higher than average number of jobs in manufacturing, but a lower number of jobs on average in higher value service sector industries like IT and communications, professional and technical services (including business consulting), and finance.

[1] (*noting that Hereford is a cathedral city, it ranks as one of the smallest in the UK by population – our general references to 'market towns' therefore includes Hereford

Figure 3: MFP area location quotient for proportion of employee jobs by sector, compared to England averages in these sectors, 2022



Figures 4 and 5 show (from left to right, top to bottom) the overall proportion of jobs by sector in the Marches area (Figure 4), and England and Wales (Figure 5). These diagrams further highlight the relatively stronger role for manufacturing and agriculture in the Marches, and the smaller role for services. It is also noteworthy, in Figure 3, as well as in Figures 4 and 5, that transport services are notably smaller in the Marches area, highlighting challenges with providing transport infrastructure across a relatively dispersed population.

Figure 4: Marches area proportion of jobs by main sector classification, 2022

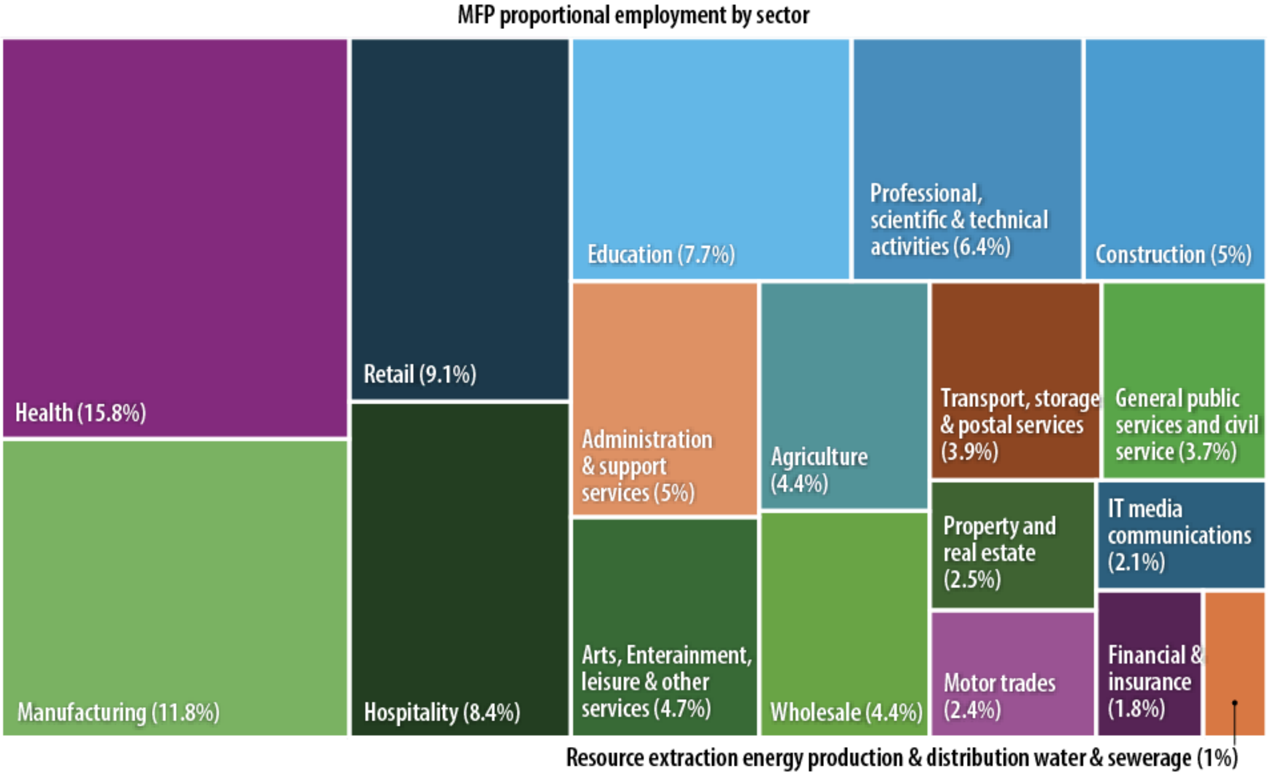
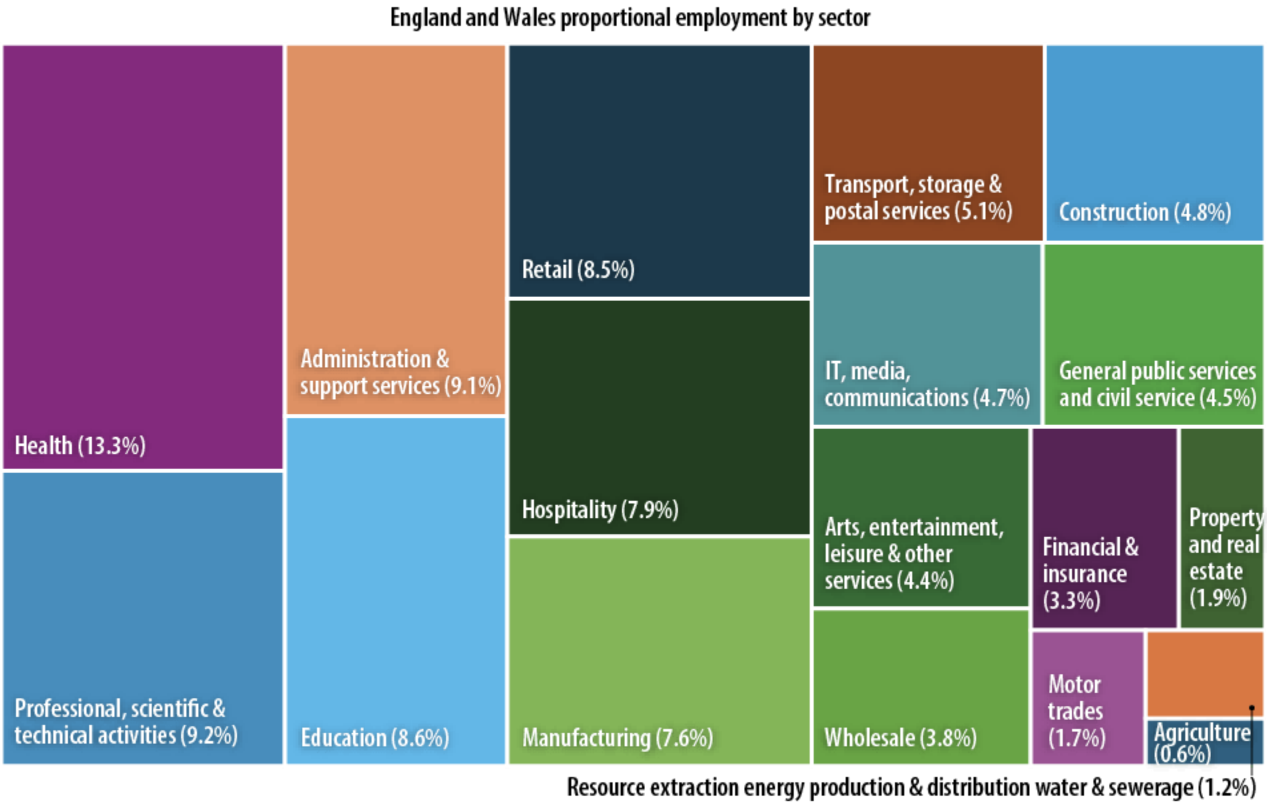


Figure 5: England and Wales proportion of jobs by main sector classification, 2022



We need a strategy for our industries and key sectors and growth opportunities. We must celebrate our rural economy, and the importance of our agri-food industry to national food supply and security. However, we cannot shy away from the fact that rural jobs are often lower productivity than many other sectors. Whilst embracing the attributes and characteristics of our area, we must seek to find ways to boost rural productivity, by leaning into our existing strengths and assets.

Intervention area: Marches Good Food Movement

A rural innovation region, leading food production for the nation, growing the food sector and supporting future adaptation techniques and land management opportunities to enable future proofing for climate change. Activities will build on the success of established sustainable food partnerships, collaborating with agri further education (FE) expertise, to drive a resilient and regenerative Marches good food and hospitality movement.

Background

By providing framework interventions which support the way we produce and sell outputs of the agri-food sector in the MFP area, we can deliver both greater sustainability in the sector and higher value for producers.

Theory of change

The sustainable good food and food tourism industries are rapidly growing sectors as part of the high-growth high-value wellbeing and experience economy, but are relatively underdeveloped in the MFP area. There are first-mover and coordination problems which the MFP will seek to overcome on behalf of producers, including through strengthening local supply chains, promotional and trade events, and national and international marketing and branding.

Programme business case

To identify and overcome specific market failures, which will enable higher value products and services output from our agri-food industries. This will also improve the market size and access of the wider sector, for example through marketing or through widening regional supply chains in adjacent sectors, such as tourism and hospitality.

Firstly, and most directly, we should seek to identify and support ways to boost productivity within the existing agri-food sector and its core activities. In particular, new technologies and new trends, present emerging opportunities for business and farms. Higher value products in the food, wellbeing and lifestyle industry, associated with the trend towards good food and wellbeing tourism, are a major growth sector in the UK and we need to be proactive in promoting the sector locally, driving skills development and becoming a national leader.

Intervention area:
Marches Innovation and Knowledge Network

Establishing a Marches hub and spoke model of innovation and technology skill centres, utilising existing FE expertise and sectoral strengths. The Marches model will reset skills for the future economy, growing the skills base and addressing low wages, by developing the region as a centre of excellence for climate adaptation and fairer pay.

Background

We have a relatively highly skilled population in the Marches, but we also know that we have challenges attracting investment, sustaining higher value businesses, and encouraging young people and young families to stay in and move to the area.

We also know that we are not yet maximising our potential for capturing the value of our natural assets to support growth in the green economy.

Theory of change

The Marches Knowledge and Innovation Network will therefore seek to identify and implement the framing conditions required to grow higher value businesses and sustain a high-skilled, dynamic labour market, in targeted sectors.

There are things we can and are already doing as a group of authorities in this area, including working collectively with Business Wales and the British Business Bank to ensure that our business support offer is well-targeted and strategically defined across the MFP area.

Programme business case

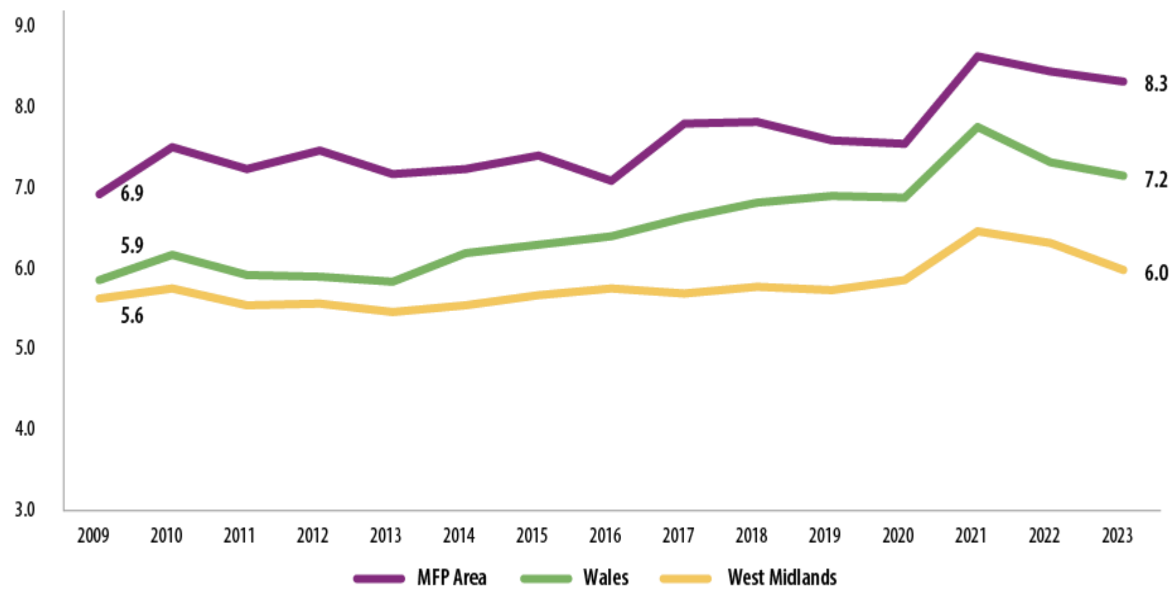
The role of the Innovation and Knowledge Network will be to create the business-environment required to make the Marches a more attractive place to invest and to live and work. This could involve intervening directly in skills and training around specialist, targeted sector specialisms, or it could be focused on cluster growth, and the places, infrastructure and buildings and facilities needed to pursue growth.

Finding ways to increase the supply of homes is also going to be essential. Our attractiveness as a place for in-migration and tourism means that we have relatively high house prices, and a high house price to income ratio (the key affordability metric for home ownership). This is a further negative push factor for younger residents and young families.

Good quality and affordable housing is key to a strong local economy because it increases local disposable income and reduces housing-related ill health.[viii] The UK is currently experiencing an acute housing crisis, which has different articulations within communities, but the fundamental commonality is that there is not enough affordable housing available for people to rent or buy.[ix]

Figure 6 below shows that the house price to income ratio in the Marches area has increased significantly over the last 14 years, with the average house price increasing from approximately 6.9 times the average salary in 2009 to 8.3 times the average salary in 2023. The ratio has also grown faster than in comparator areas, with the gap between the ratio growing over time between the MFP area and the whole Wales average, as well as the West Midlands, shown here as a regional comparator.

Figure 6: Median house price to median income ratios since 2009 in the MFP area and compared to England and Wales



A high proportion of expenditure by residents on housing costs, which particularly impacts young people and families who spend a higher proportion of their income on housing costs, is a drag on local economic activity as it reduces disposable income available for consumption in local businesses, which further disincentivises new investment.

Intervention area: Marches Affordable Market Towns

Establish an evergreen investment housing loan fund, to catalyse and scale up affordable housing opportunities, for key workers in growth sectors using an existing delivery model. Homes will be energy neutral and harness the unique network of Marches market towns, to tackle the underutilisation of town centres and address unmet housing need.

Background

Our historic market towns are one of our embedded strengths across the region. Their attractiveness and unique characters are ready-made pull factors for investment, residents, and economic activity across retail, leisure and wider services.

However, at present, we are not making full use of the potential of these areas. High housing costs (for both rent and mortgages) are a key cause of stagnating local economic activity, as they reduce disposable income and draw money and demand away from local economic activity. They also disrupt the locational decisions of workers and firms, which might lead to below land use and the possible hollowing out of town centres.

Theory of change

Place-focused investment will increase the economic potential of our market towns, by increasing effective economic density. This means that initiatives which increase business activity and visitor footfall within a town lead to higher market access for firms, and new, demand-led investment. Place-focused investment also increases the chance for the development of new clusters of economic activity, which drive productivity through sharing of knowledge and labour markets.

Programme business case

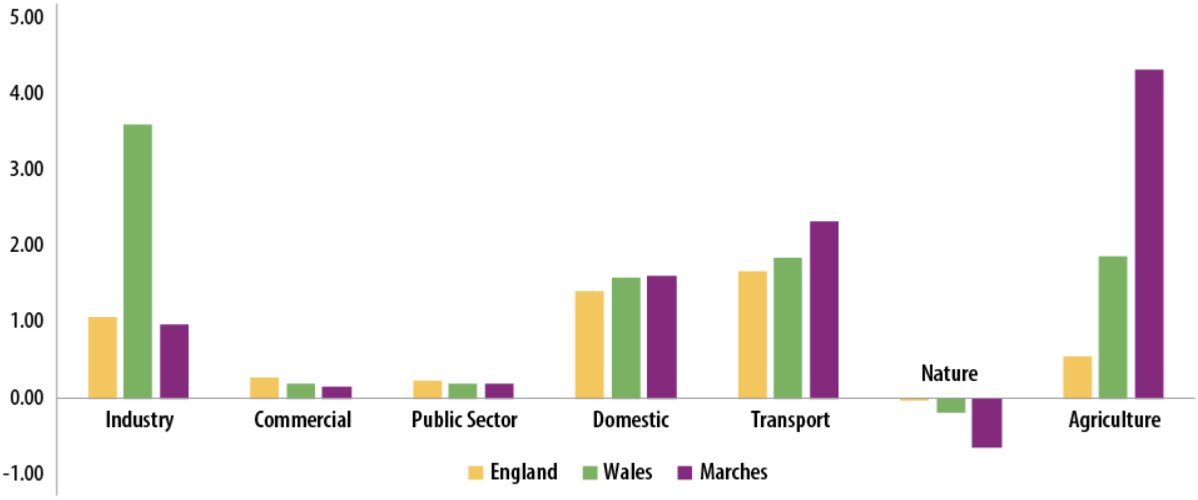
Investments will be prioritised which increase footfall or effective density in our market towns. This will include interventions which are directly business focused, but also those which improve transport connections and support new homes within market towns. The programme will identify economically under-used spaces within our towns and identify the most effective mechanisms to bring them back into productive use as affordable housing. Interventions will be prioritised based on the uplift of invested-in spaces over their existing use value.

A Green Economy Trailblazer Region

A just transition is needed in the UK which proactively manages the inevitable shift towards a green economy and green energy generation in a way that respects not just environmental urgency but also equality, social justice and democratic voice.[x] Within this transition, a new generation of green energy is paramount which reduces costs for families and businesses and increases investment and productivity. Developing a cross-border green agenda is a key opportunity to solidify the Marches in national debates as leaders in this transition, a region which draws on the breadth and richness of the assets at its disposal.

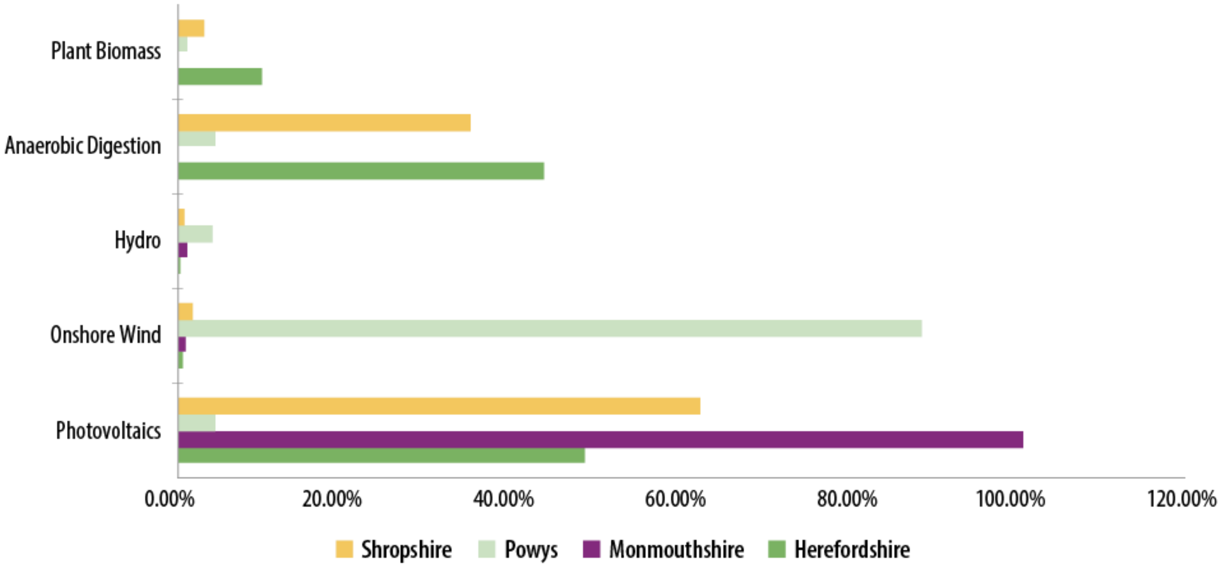
Access to nature is also a pivotal aspect of well-being for individuals and communities, and where a just green economy transition supports access to nature and protects and enhances biodiversity, the benefits will be compounded. The positive impacts of people being able to spend time in green spaces are well evidenced and it is also known that groups who already experience disadvantage have less access to nature and greenspace.[xi] Alongside the well-being benefits for individuals who are able to access nature, there are key pull-factors to this in terms of the tourism industry.[xii] However, it is clear that without direct policy intervention local authorities will be unable to protect the existing environment from further erosion.[xiii]

Figure 7: tons of CO2 per capita by emission source sector, MFP area in comparison to Wales and England, 2022



As shown in Figure 7, in certain sectors the MFP area has a relatively unique pattern for CO2 emissions in compared to Wales and England averages. As mentioned above, a relative challenge in providing public transport infrastructure across a dispersed population, means that high private car use pushes emissions from transport above the average for England and Wales. Additionally, agricultural emissions are far higher than the England and Wales average given the high proportion of rural jobs. In total agricultural emissions account for 47% of total emissions in the MFP area, compared to around 10% across England and Wales. However, at the same time, due to the same features of geography, the Marches is able to capitalise on its natural assets to sequester more CO2 on average from nature in comparison to the average in England and Wales.

Figure 8: Proportion of renewable energy generation by source, MFP Local Authorities, 2022



Additionally, as shown in Figure 8 above, the MFP area is able to generate renewable energy from a diverse range of sources, and with greater potential access to renewable sources than many other parts of the UK. The carbon sequestration and renewable generation potential of the MFP areas' natural assets should put the area squarely at the forefront of the push towards a just and renewable transition via rapid growth of the green economy. It is also a central part of our Environmental Investment Platform.

Intervention area: Marches Environment Investment Platform (MEIP)

The Marches can go further to capture the advantages of its natural environment to become a national leader in green growth. The platform will provide a Marches-wide mechanism for enabling and supporting private investment in green initiatives via public funding, where it is proven to solve market failure and maximise environmental and economic outcomes.

Theory of change

The platform will use the coordinating and first-mover functions of the public sector to overcome the market failures that cause inaction in these kinds of investments, but with a view to maximising private funding opportunities and reducing the cost to the public purse.

Programme business case

As an early example, MFP is exploring how it can leverage wider funding for the Severn Valley Water Management scheme, but the principal can apply to a range of investment opportunities across the area.

As a programme-led approach, MFP will be able to scrutinise, compare, contrast and prioritise within a range of potential investment areas to maximise economic returns to any public investment.

The tourism industry is more developed than in an average area, although perhaps still relatively underdeveloped given the tourism assets of the area.

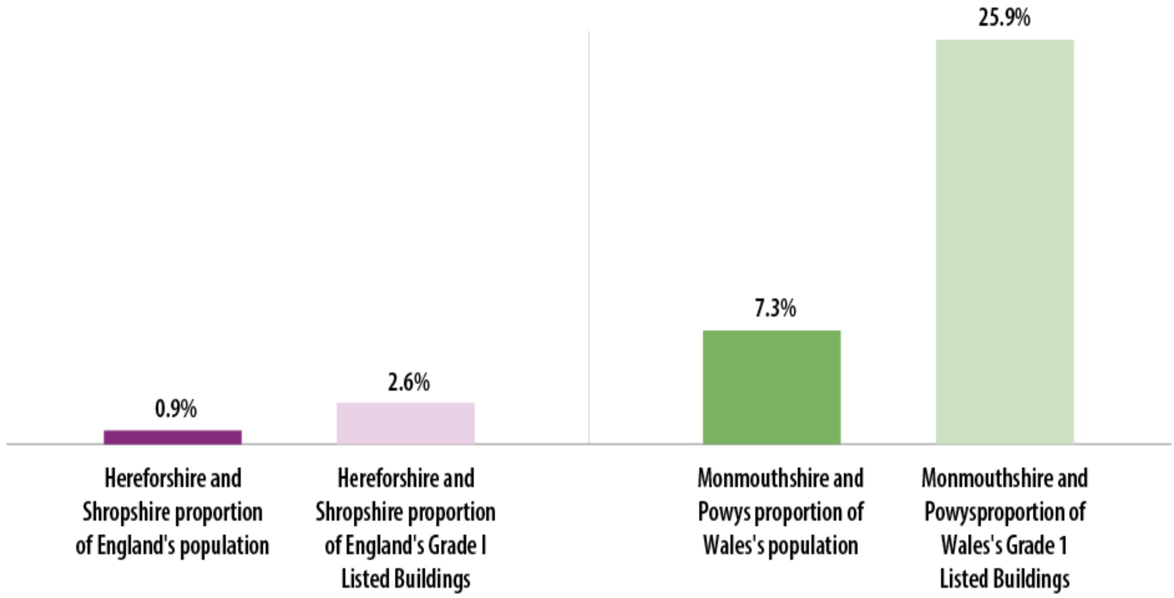
These tourism assets are set out in Figures 9 and 10 below. Comparing the Marches region to areas that have received devolution deals to date (or have deals planned), it is notable that Marches is one of only three areas to have each of an AONB (multiple), a national park, and a UNESCO Global Geopark.

Figure 9: AONBs, National Parks, and UNESCO Geoparks by sub-regional area in the UK

	AONB	National Park	UNESCO Global Geopark
MFP Area	✓ Shropshire Hills, Malvern	✓ Brecon Beacons	✓ Fforest Fawr
North East	✓ Northumberland Coast	✓ Northumberland	x
Tees Valley	x	x	x
York and North Yorkshire	✓ Nidderdale, Howardian	✓ HYorkshire Dales, North	✓ YNorth Pennines
Lancashire*	✓ Forest of Bowland, Arnsi	✓ Yorkshire Dales	x
Liverpool City Region	x	x	x
Greater Manchester	x	x	x
West Yorkshire	x	✓ Peak District	x
Hull and East Yorkshire*	x	x	x
South Yorkshire	x	✓ Peak District	x
East Midlands	x	x	x
Greater Lincolnshire*	x Lincolnshire Wolds	x	x
West Midlands	✓ Cannock Chase	x	x
Cambridgeshire and Peterborough	x	x	x
Norfolk*	✓ Norfolk Coast	✓ Norfolk Broads	x
Suffolk*	✓ Deadham Vale, Suffolk Coast	x	x
Greater London	x	x	x
West of England	✓ Cotswolds	x	x
Devon and Torbay*	✓ Devon Coast, Tamar Vall	✓ eExmoor, Dartmoor	✓ English Riviera
Cornwall*	✓ Cornwall Coast, Tamar Valley	x	

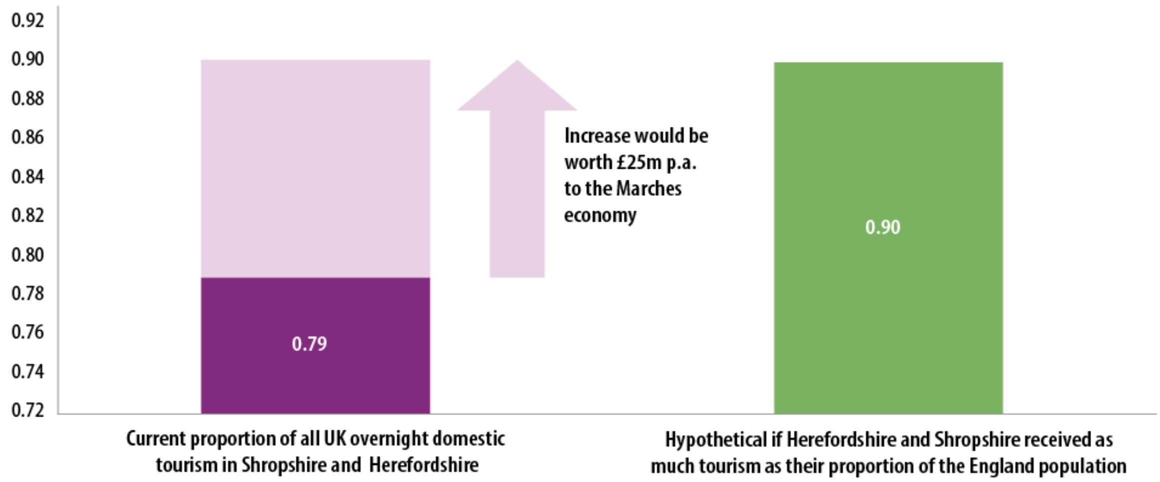
Additionally, in terms of the heritage of the built environment, Figure 10 below shows the high proportion of Grade 1 listed buildings in the MFP area.

Figure 10: Marches area proportion of Grade 1 listed buildings in their country, compared to their relative population proportions



These figures highlight the rich potential of the Marches' tourism economy. However, data on visitor trips to the Marches suggests that the potential is not yet fully explored. For example, Figure 11 shows that, proportional to its population, the English MFP authorities have a relatively low number of overnight domestic tourist visits within the UK. This is only data for domestic visits (not including more lucrative foreign visits), and only for England (not including Monmouthshire and Powys), but if the MFP area could attract a number of domestic visitors proportional to its population size (for Shropshire and Herefordshire that would involve increasing all overnight domestic visitor trips in England from 0.79% to 0.9%), this would be worth an extra £25m per annum to the domestic economy.

Figure 11: Potential value uplift from achieving a population-proportionate number of overnight domestic tourism trips in the MFP area



Intervention area: Marches Connects – Tourism Fund

Utilising Offa's Dyke as the cultural spine of the region, linking and building on the Marches market towns, historic assets, landscape, rivers and canals. This will open up accessibility to all, creating a connected tourism offer to walk in the history and natural beauty of the Marches region.

Background

The Marches has relatively untapped tourism potential, both for its natural and historic assets. It is one of only three sub-regional areas in the UK to contain multiple areas of outstanding natural beauty (AONB), a national park, and a UNESCO Global Geopark. It also has a high proportion of Grade 1 listed buildings, Monmouthshire and Powys are home to more than 25% of Wales's Grade 1 listed buildings.

Theory of change

Tourism in the Marches area is a high potential industry given the area's assets, however it is relatively underdeveloped. Growth in higher-value and sustainable tourism is one way to increase rural productivity, for example by diversifying rural land uses to capture additional value from tourism activities in addition to existing uses.

Programme business case

First-mover and business infrastructure challenges hinder growth in tourism, with small firms unable to make the strategic investments required to grow tourism within an area – despite the natural assets of a place.

The programme will identify the interventions which will provide maximum returns in terms of boosting demand for tourism inflows, including infrastructure that facilitates movement and access to tourism sites, and marketing and branding that increase the competitive profile of the area.

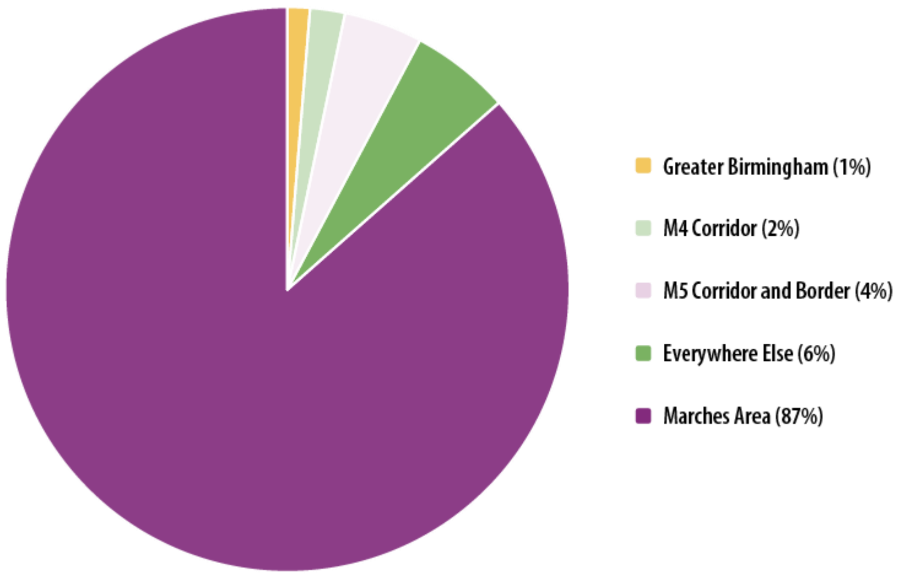
Healthy and Connected Places

Assessing the MFP economy holistically, it is important to note that the natural and built environment assets highlighted mean that our economy does not naturally possess some of the features of high productivity economies, in particular those related to dense urban cores and agglomeration

But we cannot expect to grow and improve living standards by being hinterlands to regional metropolitan areas especially given, as shown in Figure 12, those connections are not already deeply embedded. We must therefore look to our own economic geography to drive prosperity.

In Figure 12, we see another unique feature of our economic geography in analysis of travel to work patterns by residents in the Marches local authorities.

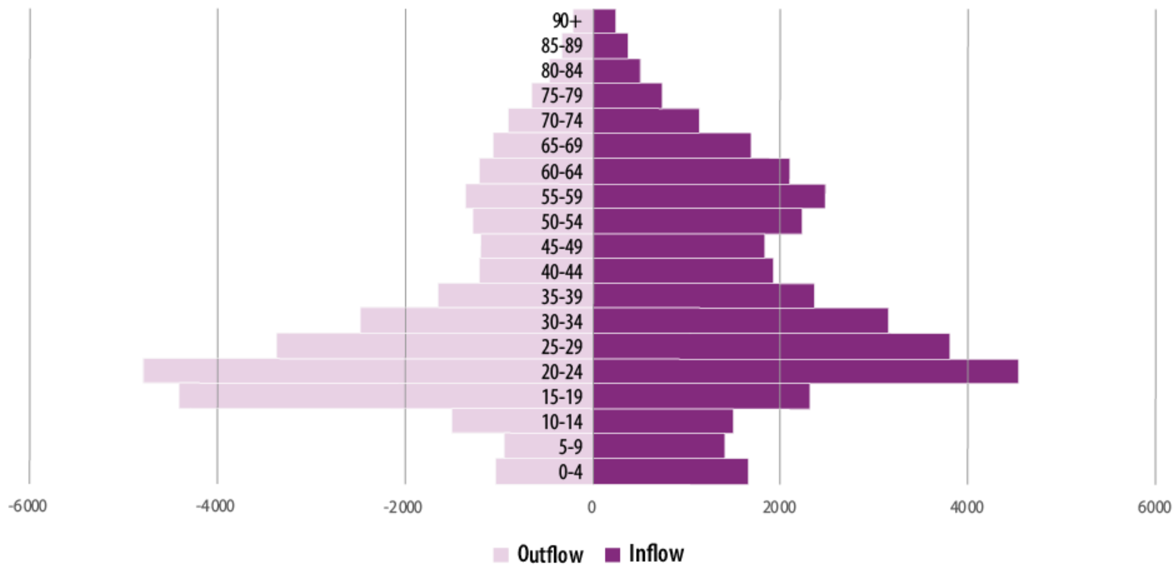
Figure 12: Travel to work patterns for Marches residents, 2022



This analysis highlights that most travel-to-work trips by residents in the four local authorities take place from homes and to jobs within those four local authorities. Only a small proportion travel to work in the surrounding city-region or corridor economies.

We have significant net out-migration of younger populations – post school-leaving age, and significant net in-migration of later career and retiree populations, as shown in Figure 13. This erodes our natural labour market, which works as a disincentive for new investment.

Figure 6: MFP area resident population inflows and outflows by age band, 2022



Our older population is relatively affluent and skilled, drawn to the lifestyle of our towns and rural environment. Generally, they are ageing more healthily than the UK average, but just by numbers alone, and the net change in population age with young out-migration, we are leading towards a long-term challenge in health and social care services. This challenge is exacerbated by the relatively dispersed nature of the population.

Many of these challenges are overlapping and interrelated. The theories of change which flow from investment in one area, can help solve multiple policy challenges.

Whilst noting that we are never going to have the agglomeration economies of major metropolitan areas, there is much we can do to increase economic activity within our market towns and the interconnectedness of all our areas, which will provide greater economic potential and a pull-factor for new investment.

More vibrant, sustainable and connected places will encourage younger residents to stay and start families in our area and facilitate less isolated and more economically active ageing. These are the virtuous circles that derive from investing in and creating well-connected and economically vibrant places.

Accessible, affordable and reliable transport networks are essential for an economy to thrive. They are also essential when curating cross-border partnerships. Education, employment and leisure opportunities are significantly diminished without good connectivity links. Transport is central to all other strategic themes; strategically placed transport links create sustainable and thriving communities, they offer employment opportunities through extending commuter routes, encourage and enable tourism and contribute to reducing carbon emissions. Research has shown that poor connectivity due to outdated or non-existent transport infrastructure has contributed to stymying rural economies in the UK, as has unaffordable, inaccessible and undesirable housing stock and a failure to normalise technological advances in the countryside.[xiv]

Intervention area: Marches Connects

To create an equitable and connected cross-border transport system which supports movement between the union and reforms services, providing a coherent and integrated rural transport approach. Activities will include extending existing bookable on demand services, single ticketing options, an electric vehicle charging network and capitalising on existing commercial hydrogen strengths.

Background

We know that the most travel for Marches residents takes place within the Marches, but we also know that we have a very low proportion of public and active transport users. Our dispersed population creates challenges in delivering commercial public transport routes. This has knock-on impacts on the vibrancy of our local economic centres, market size, labour pool size, and social and economic isolation.

Theory of change

Better connected public transport, can drive significant changes in economic outcomes, but it needs to be proactively integrated with the delivery of new housing, plans to increase economic activity in town centres, and the promotion of health and sustainable lifestyles.

Programme business case

Our Marches Connects programme will seek to invest in the transport schemes which do the most to boost economic activity, inclusion and productivity in the area. Which could be through:

- Enabling the delivery of better-connected housing and places
- Reducing social and economic isolation for marginalised groups and communities, including non and one car-owning households
- Reducing journey times and congestion
- Increasing market size and effective labour pool across the whole Marches area

We will therefore develop and scrutinise a range of options for improving our public and active transport network, including exploring options for: Integrated and concessionary cross-border ticketing, better service and operational infrastructure (including stops, information, and fleet), reliability, range, and frequency of routes, and the incorporation of transport into plans for homes and places. Healthy lifestyles are also intricately related to our places, and healthy and inclusive ageing. However, there is more we can do to address the challenge of an ageing community, and our proposal for a preventative and population focused health outcomes fund will be central to this.

The deteriorating state of public health in the UK is a pressing concern for those working within and outside healthcare systems owing to the impact of an individual's health on all aspects of their life, the economy and society more broadly.[xv] There are discrepancies between the healthy life expectancy of groups across the UK, with those in the poorest areas expected to live up to 19.3 years less than those in the richest areas.[xvi] While these are issues which affect the whole of the UK, the multifaceted causes of ill health require place specific interventions through public health strategies that are in conversation with other strategic areas such as education, housing and employment.

Intervention area: Marches Preventative Health Pilot

To pilot an early intervention and prevention health inequalities initiative, nationally and globally scalable, to help reverse the burden of chronic disease, working in collaboration with the Precision Health Initiative. Activities will support a wellbeing focused Marches economy, reducing economic inactivity and boosting economic growth while lowering long term costs to the NHS in rural areas.

Background

In the Marches area we are uniquely challenged with a relatively older and still ageing population, and a relatively dispersed rural population. Both of these facts drive up the costs of health and social care.

Although we are leading the curve towards higher costs of health and social care, this is a national problem, and the challenges faced in the Marches are a precursor of challenges that will be faced everywhere.

Unless we are content to see ever-increasing proportions of public funding being spent on health and social care, we need a radical, new approach to precision and population healthcare

This is an approach which focuses on health holistically, thinking about both healthcare services but also place-based and lifestyle factors, aiming to prevent negative health outcomes, before the high costs of treatment are needed.

We are working with world-leading experts in this field, including the Global Centre for

Healthcare Convergence, as well as our NHS Trust (England) and health board areas (Wales), as well as our own public health teams.

Theory of change

Our fund in this area will ultimately be able to leverage significant private funding and make more efficient use of NHS funding, however there is a need for local investments to create the framing environment and infrastructure to optimise outcomes.

MFP supported investment in this area will therefore be used to scrutinise the place-based and infrastructure investments required to best support preventative and population health outcomes.
Potential interventions will be developed with expert partners, and scrutinised and tested for value for money, such that only those with the best wider social and economic returns go forward.

Programme business case

We will seek to invest in interventions which provide direct returns to productivity and economic prosperity, including via:

- Supporting active and healthy ageing, which enables our older populations to remain socially and economically active for longer
- Reducing economic inactivity due to ill-health, which is a drag on overall area productivity
- Reducing national and local health and social care costs through reducing the long-term treatment burden in preventative health areas.

Endnotes

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