

IPR Report
December 2020



Bath Beyond 2020: Creating a Resilient Economy Together

A Situation Report

Institute for Policy Research
and The Good Economy

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IPR Institute for
Policy Research

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Preface

The foresight of the civic leadership in the City of Bath played a major role in ensuring that the University first gained its Royal Charter. Our relationship as a learning community with the wider community of Bath has since grown to be multi-faceted, multi-layered and of strategic importance.

Many students and staff from the University contribute directly to the local community, for example through charitable activities, community service and leadership, advisory and research support and in contributing to the economy both through direct spend and by entrepreneurial activities. In the past year initiatives such as ‘Our Shared Future’ have laid the foundation for a range of further activities. In addition, as we have more recently faced the COVID-19 emergency in Bath together, I have been grateful for the partnership and collaboration we have experienced across the City and am proud of how our University community has risen to the immediate crisis in a range of very practical ways including direct support of those in the health services.

The pandemic, however, has created great challenges for the City going forward, not only in terms of health, educational and wider social factors, but also for the economy. I am therefore very grateful to my colleagues in our Institute for Policy Research and their partners at The Good Economy for their work in producing this report which I hope will be carefully considered across our community and more widely. We recognise that it will be important for the University to respond thoughtfully to the recommendations within the report, recognising the duty we have as an anchor institution to play our full part in the future success of the City.

Looking ahead to a future beyond the pandemic, if Bath is to remain resilient in the face of the challenges ahead, I am convinced of the immensely positive contribution our University can make. We can act as a partner and catalyst for positive change through our research and innovation and through our talented staff, students and graduates, so many of whom develop a lasting affection for, and affiliation with, the City we share.

Bath has a long and distinguished history and our University is, relatively speaking, a recent addition. This report asks us all to consider our role in shaping Bath’s future at this unprecedented time, and I hope that as we respond to it together it brings real benefit to many in the years to come.

**Professor Ian White, Vice-Chancellor and President
of the University of Bath**

Foreword

Relative to much of the rest of the UK, Bath is a prosperous city whose residents enjoy a good quality of life. But that general prosperity masks sharp social and economic inequalities. Children's life chances are strongly structured by the social class of their parents. Housing is expensive and home ownership out of reach for many of Bath's residents. Much of the tourist economy rests on jobs in retail and hospitality that offer low pay and limited opportunities for career development. Too often, this 'foundational economy', and the people who work in it, are passed over in strategies for improving social mobility and economic development.

Like everywhere else, Bath also faces the challenge of making the transition to a net zero economy. It needs to reduce carbon emissions from its housing stock and road transport, in particular. That is not easy in a Georgian UNESCO World Heritage city. But it is an imperative that also offers ample opportunity – for the creation of green jobs, the restoration of nature and biodiversity, and improvement in the public health and the well-being of residents.

So as towns and cities around the world turn towards thinking about life beyond lockdowns and living with COVID-19, Bath has an opportunity to consider what it means to 'build back better'. What are the social and economic reforms that would make Bath, and the towns and villages of the wider local authority area around it, fairer and greener? And how can its 'anchor institutions' – such as its local authority, universities, NHS and social care services, charitable organisations, and large employers – work together on these tasks? How can they shape a common good in Bath?

This report marks an effort to contribute to that agenda. It is a collaboration between researchers in the Institute for Policy Research at the University of Bath and a social advisory firm, The Good Economy. It draws on extensive interviews undertaken during the summer of 2020 with local partners from the public, private and voluntary and community sectors. It makes recommendations for action. I hope it will be read in the spirit of a determination to come out of the shadow of the COVID-19 pandemic with a collective agenda for civic renewal.

Professor Nick Pearce, IPR Director
16th November 2020

The Study Team

This study is a research collaboration between the Institute for Policy Research (IPR) and The Good Economy Partnership (TGE). The study team included:

- **James Copestake** – Professor of International Development, University of Bath
- **Charles Larkin** – Director of Research, IPR
- **Catrin Owen** – IPR Graduate Intern (now TGE)
- **Mark Hepworth** – Co-Founder and Director of Research and Policy, TGE
- **Sam Waples** – Head of Analytics, TGE

The Institute for Policy Research (IPR) is part of the University of Bath and aims to further the public good through research into issues of significant relevance to policy debate and decision-making. It works across the university and with external partners to enable effective research collaborations that contribute to tackling public policy challenges in the UK and beyond. Ongoing research themes include the following: evidence, data and democracy; government, politics and policymaking; science, technology and innovation; the welfare state, family and work; and widening participation in higher education.
www.bath.ac.uk/ipr

The Good Economy Partnership (TGE) is a Bath based social advisory firm with a mission to influence the positive contribution of business and finance in inclusive and sustainable development. It has rapidly emerged as a thought leader in the field of impact investment, working across public and private markets and asset class, and specialising in affordable housing, good jobs and SME finance. In 2019, TGE produced a major report on business-led inclusive growth for the Scottish Government. Their white paper collaborations with government and market participants focus on place-based impact investing and Environmental, Social, and Governance (ESG) reporting standards for the social housing sector.
www.thegoodeconomy.co.uk

Acknowledgements

We would like to thank the following organisations for kindly agreeing to be interviewed for this study and/or providing materials that we could consult in undertaking our research. The depth and range of their local knowledge and sector experience has enabled us to produce this situation report on Bath's uncertain economic journey through the global COVID-19 pandemic and thereafter.

- BANES Council
- Bath Abbey
- The Bath Bridge CIC
- Bath Business Improvement District (BID)
- Bath Chamber of Commerce
- Bath Rugby
- Bath Social and Development Research
- Bath Spa University
- BMT (Engineering & Scientific Services)
- Buro Happold (Integrated Consulting Engineers)
- CAMRA (Campaign for Real Ale)
- CURO Group Housing Association
- FCB Studios (Architects and Urban Design)
- F1f9 (Financial Modelling Business Services)
- J4 Projects (Property & Construction Consultancy)
- Mayden (Healthcare Technology)
- Mud (Web Design)
- NHS Clinical Commissioning Group for BANES, Swindon, Wiltshire
- The Pleasure Project (Sex Education)
- Pure Planet (Green Energy Supplier)
- Richardson Swift (Accountants)
- The Royal United Hospitals Bath NHS Foundation Trust
- Royds Withy King (Solicitors)
- St John's Foundation
- University of Bath
- Visit Bath

Executive Summary

What should we do Now in Order to Make it Possible to Build the Sustainable and Equitable Bath we Aspire to?

This is a situation report designed to instigate a debate between the different anchor institutions. This does not constitute a traditional academic report. It is a synthesis of existing knowledge from multiple sources in conjunction with a series of interviews with key actors in regional and local anchor institutions. This is a piece of informed commentary which will hopefully result in policies for building back better.

For the purposes of this situation report the primary focus is on the City of Bath and the immediate adjacent local electoral districts. As a matter of analytical and administrative ease this focus occasionally expands to the city-region, the West of England and the South West generally, as required by the administrative and policy implementation boundaries determined by regional and national actors that incorporate the BANES local authority.

We recommend that the following steps be taken to bring about a more sustainable and equitable society:

1. Bath's leading public sector players can do more to act as true anchor institutions. They should publish strategies and action plans that clearly specify how they will collaborate and use their economic power and influence for the benefit of local businesses and local communities. The University of Bath should play an active and leading role.
2. Bath's resilient growth strategy should build on the goodwill shown by businesses for communities during COVID-19.
3. Bath can and should do more to build a dynamic and resilient small business sector based on cluster growth strategies in the areas of specialist professional services, health-care, creative and digital technologies and green technologies.
4. Bath needs a holistic strategy aimed at enabling all young people and children living and working in the area to flourish now and in the future.
5. Bath should use the UN Sustainable Development Goals (SDGs) as a framework for creating a local impact management and measurement system for tracking and reporting its progress towards achieving more inclusive and sustainable prosperity.

How could this be Achieved Practically?

- Sign-up all medium to large employers to the (Real) Living Wage;
- Build more affordable social housing as a priority;
- Provide more extensive subsidies to public transportation within the City of Bath and with better connections between villages and with the City of Bristol;¹
- Develop further education and apprenticeship routes into new green jobs in, for example, decarbonising the housing stock, this would allow for useful linkages between BANES, Bath College and the universities;
- Expand childcare and early years services in the most disadvantaged communities in BANES, applying evidence from the effectiveness of early intervention strategies;
- Develop an evidence-informed framework for knowledge co-production and policy creation and evaluation, where people working between the various anchor institutions can interact with the work performed by the University of Bath and Bath Spa University.

The City of Bath, while actively interested in achieving carbon neutrality following the declaration of a climate emergency by the BANES Council, still struggles to achieve inclusive growth

This situation report on Bath's crisis-hit economy is the product of the 'local conversations' generated by means of a series of in-depth stakeholder interviews, which we held during the summer of 2020. We interviewed a diversity of large and small businesses from manufacturing and engineering, software development and design, property and construction, finance and accountancy, architecture, energy supply and hospitality, as well as public and social sector actors including, but not limited to, BANES Council, the NHS, CURO Housing Association and the Universities of Bath and Bath Spa. The goal of this situation report is to contribute to debate among the anchor institutions on how best to promote inclusive and sustainable prosperity in a post-COVID-19, post-Brexit BANES.

The City of Bath, while actively interested in achieving carbon neutrality following the declaration of a climate emergency by the BANES Council,² still struggles to achieve inclusive growth. An effective way of achieving inclusive and sustainable growth is with a 'place-based' policy, where local people have a say in what needs to be done and how it is to be done.

A major advantage to the locality is the presence of two higher education establishments and a further education college. These post-secondary institutions can be used to great effect to bring about the inclusive and sustainable growth desired by BANES. The University

1. For example: internal City of Bath bus services are provided free of charge and put in place a 75% discount for regular commuters between Bristol and Bath via monthly or annual employee-employer interest free loans to support the purchase of monthly and annual transport tickets. More efforts should be put in place for a tax efficient structure similar to the Irish tax saver.ie scheme, which will result in a fare reduction of up to 52% and a reduced social insurance tax for employers.

2. www.bathnes.gov.uk/climate-emergency

of Bath can help in a leadership and knowledge co-production role. Bath's hospitals, especially the RUH, are also important drivers of the 'third age economy' and the future health-care sector. Bath's NHS sector and universities together generate more than one in five local job opportunities directly and indirectly. 37% of Bath's total employment is in health, education and other predominantly public sector activities compared to a national figure of 26%. A dynamic, innovative public sector is a source of local economic resilience.

There are some major challenges facing BANES that were identified during our interviews.

- Lack of affordable housing, working poverty and deprivation
- Shortage of high-quality business space
- Skills gaps
- Shutdown of the tourist economy
- Social polarisation

The strong performance of Bath's universities and Bath College on employability, apprenticeships and educational progression appears to contrast with the local 'skills shortages' reported by the interviewees. We can attribute this to labour market barriers – transport accessibility and a lack of affordable housing – and a shortage of good quality jobs that offer decent pay and a career start. There is wide recognition that Bath faces distinctive problems of governance that go beyond differences derived from political party disputes; the aptitude for visionary leadership and the dissatisfaction with respect to the relationship between central and local government was conveyed by interviewees. Those interviewed shared a view that COVID-19 has exacerbated Bath's inequalities. Home-working capabilities are different for those at either end of the socio-economic spectrum.

Tourist arrivals were affected from January, with reduced numbers from China, and by the end of March the flow of visitors completely dried up, with no significant improvement in numbers until lock-down rules were eased at the beginning of July. The financial impact on BANES Council illustrates the scale of the hit. Against an annual budget of £120 million, by the end of June it was anticipating lost income of £30 million from parking, museums and commercial rents, £7.5 million in reduced council tax and business rates, and an extra £10 million in COVID-19-related additional costs. Faced with a £40 million deficit it was clear that only extraordinary central government transfers would enable it to avoid issuing a 'section 114 notice' bankruptcy notice. Brexit triggers perceived threats, including a further loss in tourism and trade due to new border restrictions, new tariffs, supply chain disruptions, a fall in the inflow of skilled European workers and international students, and the resulting loss of competitiveness in export markets.

In the recovery, Bath will need to throw its weight behind regional strategies for economic growth, competitiveness and employment – led by the West of England Authority (WECA) and the Local Enterprise Partnership (LEP) and in future the Western Gateway Partnership.

Thus, the geographical boundaries of Bath's economic development strategy need to be stretched regionally, calling for strong local leadership to ensure that 'competitive collaboration' between place-based stakeholders results in a win-win game for all. There are positive signs of new collaborative initiatives between anchor institutions. COVID-19 may just be the catalyst for launching an anchor institution-based approach to inclusive growth.

What do we need to do to Improve?

We need to attract inward investment in high value knowledge-based sectors and incentivise high growth companies and new entrepreneurs to build their businesses in the area. 'Reinventing' Bath as a place to do business and as a place to live and work will support and strengthen existing business connections. It would also be less city-centric: emphasising the potential attractions of locating in the towns and villages for which Bath is a hub, where community-led business initiatives have unrealised potential – for example, revitalisation of local pubs, post offices and other amenities.

We need to develop growth clusters led by anchor institutions in areas where Bath has a competitive advantage: the health-care economy (which many experts believe will lead the next fifty years of global economic growth), the creative economy, the digital economy and the green economy. We use the term 'economy' rather than 'sector' because the technologies and markets in these areas converge and overlap – for example, digital medicine or smart eco-transport systems. Cluster strategies would need to cover innovation, technical support and skills programmes geared to the needs of SMEs in particular. New business-led skills initiatives like the RESTART/ISTART need to be accelerated.³

We need to renew and re-purpose BANES town centres – the City of Bath in particular – is a high priority given the impact of the COVID-19 lockdown on the use of office and retail space, which have reinforced strong trends toward on-line shopping and home-based teleworking.

We need to switch Bath to a green growth model and build on from the Council's declaration of a Climate emergency in March 2019. The main focus of this was on how to achieve emission reduction targets by 2030 through improvement in the energy efficiency of buildings (many old and badly insulated), a shift to public transport, and promotion of local renewable energy generation. Bath's older

3. www.tbethandsomerset.co.uk/weca-istart-funding/#:~:text=I%2DSTART%20is%20designed%20to,East%20Somerset%20Council%20and%20WECA

The extraordinary requirements and challenges of COVID-19 has the opportunity to place the University of Bath back at the heart of the place-based recovery debate

population is vulnerable to protracted heat waves, and localised flooding is a perennial risk to housing where the hilly topography concentrates storm run-off.⁴

We need to close the educational attainment gap, providing better job and apprenticeship opportunities for young people and graduate retention to keep skilled people located in the region. Some of our business interviewees were able to point to strong collaborative links, often based on links with individual academics. Other respondents reported having very little contact with any of the post-secondary institutions in the city. Nearly all those interviewed cited these post-secondary institutions as assets that were not reaching their full potential for local impact. The interviewees perceived scope for the University of Bath to become much more engaged with its surrounding economy and communities.

Moving the University of Bath towards a role in promoting social innovation that builds on its position as an anchor institution requires *thinking beyond* the conventional 'triple helix' model of engagement between universities, industry and government. A new 'quadruple helix' model is already being put into practice by the University of Manchester and new universities such as Aalto in Finland.⁵ This more expansive and inclusive model *adds users* to the three stakeholders in the original triple helix model. Importantly, it extends the locus of innovation activity from the campus to 'living labs' closer to users – whether they are firms, public sector agencies or community-led organisations.

The extraordinary requirements and challenges of COVID-19 has the opportunity to place the University of Bath back at the heart of the place-based recovery debate. Existing tools, models and structures exist and have been successful in both the UK and the rest of the world, but they all require leadership. In the context of Bath, it is becoming clear that the University of Bath, in tandem with Bath Spa University and Bath College, are well placed to provide some of the leadership needed for the redevelopment of Bath post-COVID.

4. Gasparrini, A., & Armstrong, B. (2011). The impact of heat waves on mortality. *Epidemiology (Cambridge, Mass.)*, 22(1), 68–73. <https://doi.org/10.1097/EDE.0b013e3181fdcd99>

5. Reichert, Sybille (2019). The Role of Universities in Regional Innovation Ecosystems. Brussels. European Universities Association.



Introduction

Background

2020 is a year like no other, with the global COVID-19 pandemic impacting on communities and economies worldwide. These historic events have thrown into sharp relief the inter-dependencies between society, the environment and the economy. These are especially visible at the local level – in places like the City of Bath and the wider Bath and North East Somerset (BANES) area. They have catalysed a forward-looking ‘local conversation’ about the present state and future prospects of the Bath economy.

At the time of writing in October 2020, we are mindful that Bath – like the rest of the UK – is faced by a second wave of COVID-19 lockdowns and the deepest economic recession on record. Things will most likely get worse before they get better. Bath’s economic recovery is now likely to be at best U-shaped (slow), not V-shaped (rapid), and very likely W-shaped (‘double-dip’), or K-shaped (divergent some recovering, others continuing to decline). We are not in a position to give a definitive answer to this question – a position we share with every one of our interviewees when we spoke with them during the summer.

However, what COVID-19 has given us a chance to do is to ask a different question, which does not require a crystal ball or a complicated econometric model. It is this: knowing what we already know about the Bath economy and the pandemic’s short-term impacts, **what should we do now in order to make it possible to build the sustainable and equitable city we all aspire to?**

In other words, this situation report is oriented more to the question ‘what should we do now?’. For the University of Bath this question relates strongly to the aspiration to develop a ‘civic university’ that plays a greater role in the local economy and with local communities. Universities across the UK have formed a national network for this purpose. It is hoped that the findings of this study will help to inform the University of Bath’s own approach.

The Study

This situation report on Bath’s crisis-hit economy taps into this ‘local conversation’ by means of a series of in-depth stakeholder interviews, which we held during the disruptive summer of 2020. We interviewed a diversity of large and small businesses from manufacturing and engineering, software development and design, property and construction, finance and accountancy, architecture, energy supply and hospitality, as well as public and social sector actors including BANES Council, the NHS, CURO Housing Association and the Universities of Bath and Bath Spa. The Acknowledgements section gives a full list of the interviewee organisations.

The main body of this situation report is organised into four sections, which mirror the semi-structured questionnaire used for the interviews:

- The impact of COVID-19 on the Bath 2020 economy (Section 2)
- Possible directions for creating a resilient, dynamic and sustainable Bath economy (Section 3)
- Defining a new anchor institution role for the University of Bath (Section 4)
- Towards a collaborative place-based strategy led by Bath's 'anchor institutions' (Section 5)

We have highlighted the importance of 'anchor institutions' in navigating and driving Bath's economy through the present crisis and towards an inclusive and sustainable future. These institutions include local government, the NHS, the housing associations and universities and colleges. National bodies are drawing up anchor institution models and toolkits in all of these sectors. These emerging models need to be implemented and joined-up across sectors as place-based social innovations. This is what we mean by a 'collaborative strategy' for Bath.

Anchor institutions, alongside their main functions, play a significant and recognised role in a locality by making a strategic contribution to the local economy. They have strong ties to the geographic area in which they are based through invested capital, mission and relationship to customers and employees; they tend to be large employers and have significant purchasing power; and they tend to operate not-for-profit; it is much simpler for private businesses to move, meaning there is no guarantee they will continue serving the local community in the long-term.

UK Commission for Employment and Skills, 2015

Anchor institutions should also include large employers with a long-standing presence in Bath and established charitable foundations working to strengthen local communities and tackle deep-seated inequalities. Our interviewees featured a range of private, public and social sector 'anchor institutions'. In these unstable and unpredictable times, Bath's anchor institutions matter more, and we should expect more from them.

We hope that this situation report will be seen as a timely and useful contribution to Bath's efforts to navigate successfully out of the crisis and get on a path to inclusive growth and sustainable development. Our hope is that this situation report will be read by decision-makers in all sectors of the local economy and by everyone living and working in Bath. 'Place-based' policy is about local people having a say in what needs to be done and how it is to be done.

2

The Impact of COVID-19 on the Bath Economy

Bath has its own 'left behind' communities. The challenge of building a resilient local economy has become more urgent

The economic impacts of COVID-19 are visible everywhere, but not in the unemployment or business insolvency statistics. They are masked by the Government's furlough and business support schemes. As these run down, The Office of Budget Responsibility (OBR) forecasts suggest that the national unemployment rate could climb from under 5% to 7.5% in 2021.⁶ Organisation for Economic Co-operation and Development (OECD) surveys suggest that 70% of small firms face serious cash flow problems with 35% unlikely to reopen again.⁷

Prior to the pandemic, Bath's local economy appeared to be performing well on inclusive job growth by national standards (see map on page 20). However, the UK is the worst performing OECD country on inclusive growth – low economic productivity and high social and spatial inequality.⁸ And it has been harder hit economically by the COVID-19 crisis than most other OECD countries. Bath has a high productivity economy overall but this is ultimately a bifurcated economy with high and low-skilled sectors. These low-skilled sectors share in the national problem of low productivity and this with the bifurcated earnings potential that accompanies it, is contributing to rising social inequality. Bath has its own 'left behind' communities. The challenge of building a resilient local economy has become more urgent.

Local Economic Resilience

This section reports on how the interviewees perceived the impacts of the pandemic. What did they see as the main strengths and weaknesses of the Bath economy (what had COVID-19 exposed about Bath's economic resilience)? How did they perceive the *immediate* impacts of the pandemic in the first six months of economic disruption? What is the positive 'shock value' of the pandemic?

Key Strengths

A High Quality of Life that Attracts Professional Workers

Bath's World Heritage Georgian centre is surrounded by distinctive residential neighbourhoods and villages with parks, woods and countryside not too far away. This makes it an attractive option for professionals seeking a combination of urban amenities, high performing state and private schools, relaxed surroundings and

6. http://cdn.obr.uk/CCS1020397650-001_OBR-November2020-EFO-v2-Web-accessible.pdf

7. OECD Coronavirus (COVID-19): SME policy responses, updated 15 July 2020.

8. OECD (2020), *OECD Economic Surveys: United Kingdom 2020*, OECD Publishing, Paris, <https://doi.org/10.1787/2f684241-en>

access to work along the M4 corridor and with fast train services to London. Many of Bath's small enterprises are located here because their founders already lived here, or chose to live here, including those who first came to study in the region's universities.

Participating Stakeholders Quotations

From a social point of view Bath will do well because of the quality of life it boasts. Bath is poised to thrive because decentralisation out of London will work in its favour.

There was an influx of professional people from London even before COVID-19 – but will they bring their jobs with them and will their businesses relocate as well?

A Diversified Business Sector

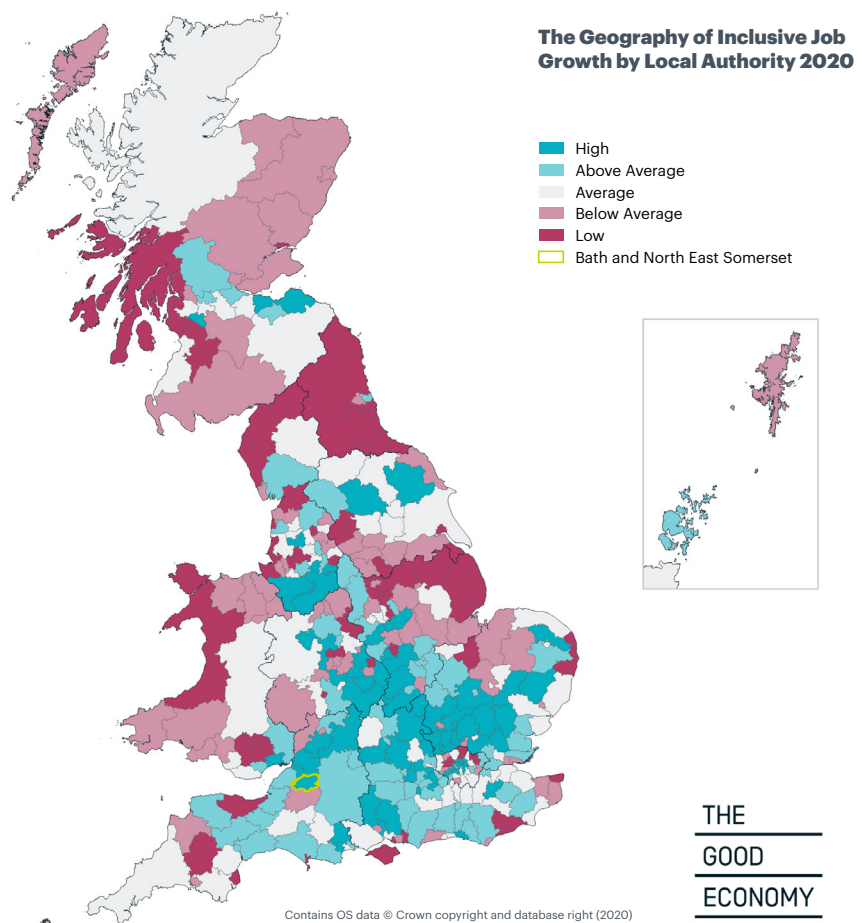
Bath's heritage and cultural sectors are place-rooted which anchor and drive the tourism and consumer services economy. The Bath Economic Renewal and Recovery Partnership⁹ has identified 16 global firms across five sectors to counter the perception that Bath's economy is purely about micro-businesses in leisure and hospitality. There are also 'hidden gem' small businesses in creative and digital services, information and communication technology, advanced engineering electronics, and private health-care. The interviewees argued that Bath should do more to promote its large *and* small business success stories.

Participating Stakeholders Quotation

Bath and Bristol combined rate as the second biggest technology hub in the country outside London, but people in the South West don't realise this. Bath business awards have been going for 10 years but a tech category has been overlooked. Bristol does promote itself to technology firms and the Council there is responsive to the sector.

9. www.bath.ac.uk/announcements/working-with-partners-for-the-renewal-of-the-regions-economy

Figure 1: The Geography of Inclusive Job Growth by Local Authority 2020



Inclusive Job Growth by Place

Growth	Inclusion
<ul style="list-style-type: none"> Private Sector Job Growth Private Sector Output Growth Micro/SME Growth Median Earnings Growth Working Age Population Growth 	<ul style="list-style-type: none"> Earnings Quality – Median Resident Earnings and % of residents earning above the Real Living Wage (RLW) Average job security Average skill profile Employment rates of Young, Women, Low Skilled and Older People

TGE has researched and selected these economic, business and labour market indicators drawing on guidance from organisations such as the Organisation for Economic Cooperation and Development (OECD), the World Economic Forum, the International Labour Office (ILO) and UN Sustainable Development Goals (SDGs). Data used are from national sources and current as of January 2020. Growth is measured over a three-year period.

A Strong Presence of Anchor Institutions

37% of Bath's total employment is in Health, Education and other predominantly public sector activities compared to a national figure of 26%

The BANES area has a high concentration of anchor institutions that favour local economic resilience. Bath College is the 6th most successful further education college in England (out of 172 FE colleges in England), with 52% of adult learners on benefits progressing into work and 80% of 16–18 year olds going on to employment or higher education. Bath Spa University is in the top six flight of UK universities for creative industries and ranks highly for its regional engagement with employers. The University of Bath is a top UK university with outstanding research and teaching performance. And Bath's hospitals, especially the RUH, are also important drivers of the 'third age economy' and the future health-care sector. Bath's NHS sector and universities together generate more than one in five local job opportunities directly and indirectly. 37% of Bath's total employment is in Health, Education and other predominantly public sector activities compared to a national figure of 26%. A dynamic, innovative public sector is a source of local economic resilience, as northern European countries illustrate.¹⁰ Bath's economic resilience is reflected in the healthy financial base of BANES Council, whereby retained business rates and tourism-related fee income is used to maintain the quality of care and children services provision. COVID-19 has impacted heavily on the Council's finances, leading to calls on its reserves and new strategies to diversify its income base.

Key Weaknesses

Lack of Affordable Housing, Working Poverty and Deprivation

In terms of access to affordable housing, Bath is the 6th least inclusive city in Britain (next to London and Cambridge according to Lloyds Bank).¹¹ Many people on relatively lower incomes – including key workers and younger people – move away or commute into Bath from areas with more affordable housing in Bristol, West Wiltshire and North Somerset. This contributes to skills shortages and transport problems. A lack of affordable housing compounds problems of 'working poverty' linked to Bath's high concentration of low-pay sectors – hospitality, retail and tourism. Deprivation is highly concentrated in certain wards and casts a shadow over the City of Bath's overall standards of well-being. BANES is one of the least deprived local authorities (top 30%), but ranks 7th for within-authority differences in deprivation. In other words, Bath has acute problems with 'left behind communities'.

10. Kattel, Rainer, and Mariana Mazzucato. "Mission-oriented innovation policy and dynamic capabilities in the public sector." (2018): 787–801.

11. www.lloydsbankinggroup.com/globalassets/documents/media/press-releases/lloyds-bank/2019/lloyds-bank-affordable-cities-2019-final.pdf

Participating Stakeholders Quotations

There is a huge amount of deprivation that is swept under the carpet. Bath is the archetype of a place with hidden disparities.

Bath suffers from low housing affordability which undermines attracting and retaining talent and key workers. Government proposals to change planning rules by tearing up of Section 106 requirement on developers, will hugely reduce the supply of social housing and affordable homes.

Bath struggles with 'working poverty'. The City Centre has a concentration of sectors – retail, hospitality etc – that are low paid.

Shortage of High-Quality Business Space

Bath lacks high quality office space and has been unable to compete with Bristol as a magnet for larger businesses and regional offices. The Bath Enterprise Area (including North and South Quays) represents a major investment in providing much needed accommodation for high value business sectors and will go some way to alleviate this problem. However, availability of industrial premises remains low. The quality of small office property in older houses is also low, and the Council itself has a poor reputation as a business landlord according to our interviews. Workspace for specialist firms seeking creative, flexible managed space or incubation/innovation facilities is lacking. As a result, it is common for growing businesses to relocate to Bristol or Wiltshire.

Participating Stakeholders Quotations

The Bath Quays Enterprise Zone will take five to six years. There is no space for businesses so we're losing businesses and inward investment to Bristol, Cardiff and Swindon. 50,000 square meters of modern, centrally located floor space is needed to deliver the required level of economic growth and facilitate business growth in key sectors.

Given Bath's constraints, including poorly functional period office stock, creative options need to be put forward, including more flexible working spaces, expansion of innovation/incubation facilities, and space outside the city – in Keynsham and the Somer Valley.

Skills Gaps

The strong performance of Bath's universities and Bath College on employability, apprenticeships and progression appears to contrast with the local 'skills shortages' reported by the interviewees. We can attribute this to labour market barriers – transport accessibility and a lack of affordable housing – and a shortage of good quality jobs that offer decent pay and a career start. Several interviewees of SMEs cited problems recruiting skilled staff, a problem they share with the RUH and other health sector providers. Tourism and retailing offer lower paid and often seasonal work with limited career development prospects. Bath's graduate brain drain – a problem shared by all cities outside of London – was much discussed, however we were unable to obtain reliable estimates of its scale and disciplinary mix. There is encouraging evidence of a significant reverse brain drain from London – significantly, it applies to people in their thirties.¹² This may be the best target for Bath's business and public sector employers and then its marketing and promotional strategies.

Participating Stakeholders Quotations

We should ensure that local businesses get the right blend of support and skills – they don't at present. Skills are needed to embed creativity in their operations – innovation, invention and new possibilities.

Skills aren't staying in Bath, and the older workforce is not being replaced, so there will be a skills shortage down the line. We need better apprenticeship programmes. Not enough graduates choose to stay in Bath.

Bath town centre businesses struggle with recruitment problems at all levels. This is attributable to poor transport accessibility (Park and Ride is inadequate) and a lack of affordable housing which chokes off labour supply. We face serious workforce shortages including doctors and nurses and domiciliary and care home staff.

12. www.onrec.com/news/news-archive/reversal-of-the-brain-drain-one-million-young-workers-set-to-leave-london-turning

Local Governance

We encountered widespread frustration among respondents that Bath has been able to get away with being less innovative than it could be because of its relatively secure niche and strong image as a heritage centre

There is wide recognition that Bath faces distinctive problems of governance that go beyond differences derived from political party disputes; the aptitude for visionary leadership and the dissatisfaction with respect to the relationship between central and local government was conveyed by interviewees. The almost equal split in the population between Bath city and outlying areas of North East Somerset presents practical and political challenges. A more intangible issue concerns the strength and influence of special interest groups. We encountered widespread frustration among respondents that Bath has been able to get away with being less innovative than it could be because of its relatively secure niche and strong image as a heritage centre. Resistance to radical plans – particularly concerning architecture and transport – tends to be strong, conservative and well connected politically. The small size, compactness and topography of the city also limit the scope for community initiatives and collaborations to gather momentum without becoming entrenched in party politics. While BANES council struggles to establish consensus other important local institutions have preferred not to get involved, focusing on their own interests and on key relationships outside the region.

Participating Stakeholders Quotations

It is hard to do things with the Council, but even harder to do anything without them.

Bath has a bad reputation among developers and investors as being a difficult place to get things done.

BANES Council has spent too much effort on tourism and inward investment – but its neglected local communities. It's too focused on the City centre, to the neglect of BANES district as a whole.

Place-based model led by communities – part of the future approach. There should be more user or community-led commissioning on projects – like transforming public space in Twerton – rather than developer-led.

The Immediate Impact of COVID-19

The incidence of COVID-19 in BANES lagged behind other parts of the country – confirmed cases rising above 100 per day only at the beginning of April. The NHS took sufficiently incisive pre-emptive steps locally to avoid being overwhelmed by a surge in admissions. However,

extra work demand on staff and resources through the summer have added to the huge challenge of dealing with a backlog of other work since, with delays adding to the complexity of treatment. In contrast, the economic effects of the nationwide lock-down that started on 23rd March were quick and dramatic, but the shock has been neither uniform nor entirely negative. Here we focus first on the visitor economy, then on other businesses, and third on growing inequality and social polarisation.

Shutdown of the Tourist Economy

Tourist arrivals were affected from January, with reduced numbers from China, and by the end of March the flow of visitors completely dried up, with no significant improvement in numbers until lock-down rules were eased at the beginning of July. The financial impact on BANES Council illustrates the scale of the hit. Against an annual budget of £120 million, by the end of June it was anticipating lost income of £30 million from parking, museums and commercial rents, £7.5 million in reduced council tax and business rates, and an extra £10 million in COVID-19-related additional costs. Faced with a £40 million deficit it was clear that only extraordinary central government transfers would enable it to avoid issuing a 'section 114 notice' bankruptcy notice.

One casualty of the shortfall was that Visit Bath, the organisation tasked with leading on promotion of the city, was forced to close its offices and rely exclusively on digital platforms. Visit Bath have reported more web traffic than ever before, with a shift in digital content to leisure activities that lend themselves well to socially distancing such as walking and visiting parks. Although this will have a positive impact on promoting Bath's green spaces, the future risks to the tourist economy are still phenomenal. Since every tourist activity now requires pre-planning and booking, visitors are operating on a short-term basis. For a market that relies on international tourism, this is extremely problematic. A further problem is that many of Bath's buildings are old, expensive to heat and not easily adapted to accommodate physical distancing.

Participating Stakeholders Quotations

The visitor and retail economy has been decimated.

Balance and spread the risk – don't invest everything in either students or tourism.

The Council's economic model is bust – it won't be able to make the money from rent they had in the past.

Business Disruption and Confidence

Working from home increased the pace of change for many businesses, and most interviewees expected many lock-down adjustments to become permanent. People were surprised how resilient to the COVID-19 induced shocks many businesses were proving to be (including not needing to avail themselves of business interruption loans). They reflected on how far digitalisation, reliance on the internet and automated data management had already gone. They were also mostly already adept at using digital accounting systems to permit almost real time business modelling and cash flow forecasting to assess a rapidly changing situation. More flexible personnel management cultures also facilitated the shift towards more diverse and adaptable working practices. Many businesses don't foresee a magical vaccine in the near future,¹³ and already regard working mostly from home as the new normal, while monitoring and debating its effect on mental health and communication, information flows, team working and productivity.

There have also been immediate positive benefits to the environment from home working: routine photocopying has fallen, administrative requirements curtailed, meetings cut out, commuting and business travel curtailed. Zoom meetings are more work-oriented, and there is less time for socialising and chat. There are of course, downsides to this increase in functionality, including lower staff morale, opportunities for relationship building and brainstorming. But the key point is that disruption has gone on for long enough that a clear business case will be needed to justify reverting to office-based work, with blended or hybrid models of working likely to become the norm.

Participating Stakeholders Quotations

COVID-19 has sped up things we wanted to do already, and ones which we weren't doing fast enough.

Elements of working from home are expected to be implemented permanently.

COVID-19 has accelerated health technology adoption.

We are now entering a fourth wave of office working. First there was 9-5, then flexitime, then hot-desking, and now flexible space is needed only for occasional but carefully planned in-person interaction: somewhere between the weekly office meeting and an away day. The market for office space is still playing catch-up.

13. Interviews were conducted over the summer months of 2020, a COVID-19 vaccine did not appear as a possibility at that time.

Although many businesses in Bath have held up well, they are still mostly focusing on cash flow and thinking no more than three months ahead. In terms of restarting the visitor economy, the “Eat Out to Help Out” scheme introduced in July proved hugely successful in reviving city centre life, with consumers’ desire both to get out and make up for lost time after lockdown offsetting any loss of consumer confidence or disposable income. The retail sector, in contrast, has taken a more serious hit from the acceleration of an already apparent trend towards online shopping.

Falling business confidence has been compounded by the economic and logistical uncertainties surrounding Brexit. Bath’s strong vote in favour of remaining in the European Union in 2016 cannot, of course, be reduced to a collective view of its likely economic effects on the city. But perceived threats arising from it include loss in tourism and trade due to new border restrictions, tariffs and supply chain disruption, a fall in the inflow of skilled European workers and international students, and resulting loss of competitiveness in export markets. These are amplified by the effects of COVID-19, which also weakens or delays prospects for strengthening economic linkages outside the EU.

Participating Stakeholders Quotations

It has hit creative industries particularly hard because they are mostly SMEs and depend on venues/events staying open. These industries are also important to Bath’s economic future.

Some businesses will fail and be lost to COVID-19. The first quarter of next year may be more challenging and there may be uncertainty in the future for most of our clients.

Business and job impacts are along sector lines. Retail, entertainment and leisure will struggle. But this is a mixed picture, with some knowledge-based businesses taking things in their stride.

Bath’s strong vote in favour of remaining in the European Union in 2016 cannot be reduced to a collective view of its likely economic effects on the city

Looking ahead uncertainty continues to increase, with the overall level of economic activity still being heavily supported by government borrowing, and a “no deal” or “skinny deal” exit from the EU likely, it remains to be seen how and when fiscal consolidation will take place, and if it will be compounded by global economic headwinds. Bath (as well as Bristol) may be well placed to weather some of the external conditions by positioning the region as an attractive option for people and businesses wanting to move away from London and the South East. Ultimately, these relative advantages could easily be swamped by more profound macroeconomic changes.

Social Polarisation

Interviewees shared a view that COVID-19 has exacerbated Bath's inequalities. Home-working capabilities are different for those at either end of the socio-economic spectrum. COVID-19 has made clear the difference between knowledge professionals who can work from home versus those working in retail, leisure and hospitality, for whom homeworking has not been an option. Workers in these low pay sectors already have higher rates of mental health problems, poorer physical health, less labour market mobility and overall less of a social safety net.¹⁴ Without downplaying the negative effects on low income workers of the loss of 20% of income while on furlough, this is relatively small change compared to the cut in income they could experience through redundancy once the scheme ends.

COVID-19 has also amplified the lack of affordable housing for those on low-incomes in Bath. CURO has seen increasing demand for its services, in line with rising needs for social housing across the country. It has also reinforced Bath's existing inequality problems among children and young people. The employment prospects for younger people have been particularly badly hit. More established firms may be wary of limiting graduate recruitment for fear of leaving a generational gap in their workforce that could be hard to refill and are also more likely to accept some responsibility for taking on young staff. But this is a luxury most SMEs cannot afford. Hence, it is reasonable to expect a further polarisation in work prospects and incomes, in line with educational attainment gaps.

CURO has seen increasing demand for its services, in line with rising needs for social housing across the country. It has also reinforced Bath's existing inequality problems among children and young people

Participating Stakeholders Quotations

For 'JAMs' (Just About Making it,) COVID-19 means they are no longer just about making it.

We're not doing well at inclusive growth. Bath is very polarised and the well-being gap is widening. We're worried about the future of local town centres – for example, Radstock. Social and spatial polarisation go hand in hand.

Bath Spa University has a high proportion of 'widening participation' students and 75% of students are local to the region – hence it plays a key role in social mobility through the local labour market. We have seen worrying signs that the students and their families are being put off by higher education costs, because these households have been hardest hit by the COVID-19 impact on jobs and small businesses.

14. Lohmann, Henning, and Ive Marx, eds. *Handbook on In-Work Poverty*, (Cheltenham, UK: Edward Elgar Publishing, 2018) doi: <https://doi.org/10.4337/9781784715632>

Finally, we want to highlight a perception amongst the interviewees over the shock value of the COVID-19 crisis. As one respondent put it:

Participating Stakeholders Quotations

This is the largest disruption since World War Two. We need to grasp the moment. For several respondents, this shock value came from getting 'a glimpse of the future'.

A greener future as traffic and air pollution levels plummet during the lock-down LINKED to a digital future as workers, shoppers, patients and businesses go on-line and work from home.

This is a good time for developing future scenarios with Bath's local communities and businesses. We hope that this situation report will provide a useful source of material for this type of vision and public engagement work.

A positive shock value of the COVID-19 crisis is that it has encouraged a spirit of collaboration and a stronger sense of community. This is the social capital which Bath will need to pursue a place-based approach to inclusive growth and local economic resilience. The challenge is to ensure that this social capital grows in the midst of the COVID-19 and economic crisis to become an enduring asset for creating a resilient economy together.

Participating Stakeholders Quotations

We must build on the community spirit that COVID-19 helped create.

We must rebuild the communities on the outside of Bath and spend money locally to prevent hollowing out.

A cohesive village can make a difference, and this capacity isn't being used or animated.

Community and voluntary sector has been galvanised – e.g. Third Sector Group (3SG) is a new consortium of charities.

3

Routes to Resilience

Forecasters generally think that the negative economic shock to the UK – deeper than in other OECD countries and the worst on record – will last for another two to three years, at least. Bank of England Governor Andrew Bailey refers to ‘the need for more aggressive policy’ to combat the ‘unprecedented level of economic uncertainty’ facing the UK.¹⁵ In our view, ‘aggressive policy’ means shortening Bath’s current economic development strategy time frame – from 2030 to 2023 – and making RESILIENT growth the focus for sharpening policy and galvanising collaborative working.

Many interviewees welcomed wider public discussion of the future of Bath’s economy triggered by the pandemic. While dominated by concerns about the economy’s ability to bounce back, they also linked this to questions about resilience, inclusiveness, sustainability, image and governance. The idea of resilience resonated strongly across the interviews.

The interviewees viewed 2020 as a watershed in Bath’s economic and social development. Importantly, they also argued that big and small steps could and should be taken now, rather than waiting for any semblance of a return to normality. In this section we look at the routes to a more resilient local economic future.

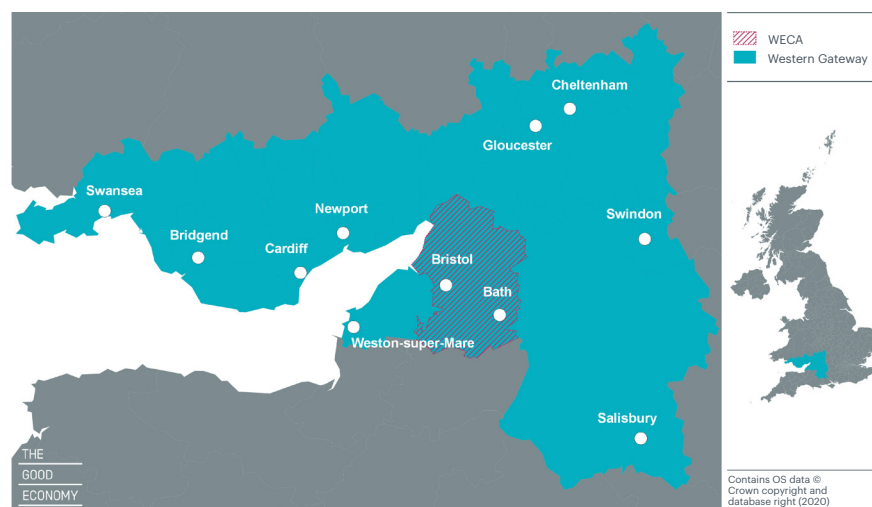
Regional Economic Collaboration

Bath will need to throw its weight behind regional strategies for economic growth, competitiveness and employment – led by the West of England Authority (WECA) and the Local Enterprise Partnership (LEP) and in future the Western Gateway Partnership (please see Figure 2). Thus, the geographical boundaries of Bath’s economic development strategy need to be stretched regionally, calling for strong local leadership to ensure that ‘competitive collaboration’ between place-based stakeholders results in a win-win’ game for all.

Bath’s economic growth and business performance is undoubtedly impacted by the policies and spending decisions of WECA and the LEP – for example, in the areas of infrastructure and planning, skills and business support and inward investment. Typically, SMEs are unaware of trends in regional economic governance and what it might mean for their own business strategies. The Local Industrial Strategy has engaged SMEs in key sectors. Furthermore, interviewees closer to these institutions believe that BANES has not been proactive enough in influencing WECA strategies, particularly in competing for regeneration funding.

15. www.bbc.co.uk/news/business-54594356

Figure 2: Map of the “Western Gateway” strategic partnership and the West of England Combined Authority



The regional dimension of Bath’s economic development strategy could be championed by the universities and Bath College, which are already involved in the region’s skills and business support policies, as well as the local industrial strategy. At the same time, these ‘anchor institutions’ could play a dual role providing a bridge between the regional competitiveness and inclusive growth agenda and Bath’s local competitiveness policies and place-based approach to building resilient communities. Whilst continuing to promote its signature culture and heritage sectors, Bath’s global competitiveness and inward investment priorities in key technology, manufacturing and professional service sectors can be pursued regionally – as part of the Western Gateway’s industrial cluster strategies.

Participating Stakeholders Quotations

Bath’s voice at WECA needs to be bigger and clearer on objectives. BANES Council has not been effective in drawing down regional grant funding to tackle regeneration and deprivation.

There is a strong trend towards regionalisation. WECA has the power and resources to act like the old Regional Development Agencies – the Western Gateway is planned to be a trans-regional economic powerhouse. This regional axis of Bath’s future economic policies is vital.

Bath and the West of England are not the right size for global economic competitiveness strategies. The Western Gateway is more like the kind of size needed to compete globally or rival UK big groupings like the Midlands Engine or the Northern Powerhouse. Perhaps we should resurrect Wessex as the right economic area. Size matters!

Anchor Institutions for Place-Based Inclusive Growth

The interviewees recognised the need to make the local economy more resilient and inclusive, and that doing this would entail greater collaboration between BANES and other ‘anchor institutions’ across the city.

COVID-19 may just be the catalyst for launching an anchor institution-based approach to inclusive growth

Not all respondents were familiar with the concept of anchor institutions, but nearly all of them articulated in some way a belief that new forms of cooperation and collective action were needed to achieve a more coherent local strategy for inclusive and sustainable growth. There was interest in the anchor institution concept, and positive signs of new collaborative initiatives. COVID-19 may just be the catalyst for launching an anchor institution-based approach to inclusive growth.

Participating Stakeholders Quotations

Bath Spa University is more integrated into the economic life of the City and is a driver of inclusive growth given its local, widening participation student profile. The University of Bath needs to work more with local communities on widening participation and with local SMEs on knowledge transfer and skills. At the moment, BANES and the University of Bath are under-performing as anchor institutions.

We want the NHS to be seen as an anchor institution – but we’ve never looked at our economic impact. We want health to be seen as a driver of well-being and inclusive growth, rather than as a drain on resources. We sit on the BANES Health and Well-Being Board – alongside the University of Bath.

It is difficult to put social and key worker housing into Bath – it’s expensive, the big developers dominate and persuade the Council to support them. We call this the ‘Bath is Full’ syndrome – it pervades policy and culture here and needs to disappear. 10% of CURO’s social housing residents study at Bath College – which is more important for employability than the universities. Our employability team works with the College.

St. Johns Foundation is partnering with the Council on its new child poverty strategy. The appetite for alignment is there, but we need trusted partners and more compassionate mindsets. We work closely with CURO on a routine basis. Bath Spa University and the College are also positive and see themselves as collaborators. The risk is that Bath is conservative rather than progressive.

Figure 3: The NHS as an Anchor Institution

What makes the NHS an anchor institution?

NHS organisations are rooted in their communities. Through its size and scale, the NHS can positively contribute to local areas in many ways beyond providing health-care. The NHS can make a difference to local people by:



Purchasing more locally and for social benefit

In England alone, the NHS spends £27 billion every year on goods and services



Using buildings and spaces to support communities

The NHS occupies 8,253 sites across England on 6,500 hectares of land



Widening access to quality work

The NHS is the UK's biggest employer, with 1.6 million staff



Working more closely with local partners

The NHS can learn from others, spread good ideas and model civic responsibility



Reducing its environmental impact

The NHS is responsible for 40% of the public sector's carbon footprint

As an anchor institution, the NHS influences the health and wellbeing of communities simply by being there. But by choosing to invest in and work with others locally and responsibly, the NHS can have an even greater impact on the wider factors that make us healthy.

References available at www.health.org.uk/anchor-institutions
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Boosting Economic Dynamism

Create a contemporary vision and marketing strategy for Bath that will attract inward investment in high value knowledge-based sectors, and incentivise high growth companies and new entrepreneurs to build their businesses in the area. 'Reinventing' Bath as a place to do business and live and work will give more emphasis to the strength of existing business connections. It would also be less city-centric: emphasising the potential attractions of locating in the towns and villages for which Bath is a hub, where community-led business initiatives have unrealised potential – for example, revitalisation of local pubs, post offices and other amenities.

Develop growth clusters led by anchor institutions in areas where Bath has a competitive advantage: the health-care economy (which many experts believe will lead the next fifty years of global economic growth), the creative economy, the digital economy and the green economy. We use the term 'economy' rather than 'sector' because the technologies and markets in these areas converge and overlap – for example, digital medicine or smart eco-transport systems. Cluster strategies would need to cover innovation, technical support and skills programmes geared to the needs of SMEs in particular. New business-led skills initiatives like the RESTART/ISTART need to be accelerated.

Renew and re-purpose BANES town centres – the City of Bath in particular – is a high priority given the impact of the COVID-19 lockdown on use of office and retail space, which have reinforced strong trends toward on-line shopping and home-based teleworking.

Transforming town centres into sustainable and productive mixed-use environments through planning, design and financial investment is seen as the big new challenge

The visitor economy can be expected to rebound, but high street retailing less so. Transforming town centres into sustainable and productive mixed-use environments through planning, design and financial investment is seen as the big new challenge. Future centres should make space for affordable housing especially for key workers and social and community businesses. More can also be done to strengthen the night-time economy to entertain both residents and visitors.

Switching to a green growth model predated COVID-19, the Council having declared a climate emergency in March 2019. The main focus of this was on how to achieve emission reduction targets by 2030 through improvement in the energy efficiency of buildings (many old and badly insulated), a shift to public transport, and promotion of local renewable energy generation. Bath's older population is vulnerable to protracted heat waves, and localised flooding is a perennial risk to housing where the hilly topography concentrates storm run-off. Too many people also remain car dependent, resulting in well-recognised problems of traffic congestion and air pollution. For example, a significant driver of admissions into the RUH is for respiratory conditions exacerbated by air pollution (particularly among older people and children), yet around 15% of all journeys in the city are to or from the RUH itself. Provision of park-and-ride facilities is inadequate, particularly for people entering the city from the East.

Lockdown between March and July 2020 provided a glimpse of what a less car dominated future could look like. While there were winners and losers, it has reinforced the case for a just transition, capable not only of reducing emissions but reducing the health effects of air pollution, promoting more flexible working practices and generating productivity benefits for some businesses. 'Build back better' in Bath should be about retrofitting buildings to make them energy-efficient and taking a bold approach to urban design and the public realm. The city should shift to a renewable energy infrastructure.

Participating Stakeholders Quotations

We need a clearer statement of what kind of city Bath wants to be. How can it become a great small 21st century city? Should it be more like Cambridge and Oxford which publicise their biotechnology/technology start-ups and profile their Universities? We risk becoming a museum. Bath has to develop a more contemporary brand – lose its Jane Austen image and highlight success stories in creative, technology and professional services.

Developing Bath's night-time economy – spectacular food, more diverse entertainment – from drag queen bingo to classical theatre – can attract a broader range of visitors, lengthen the season, encourage visitors to stay longer and to integrate with the leisure activities of residents.

The RUH and NHS have a pivotal role to play in the city's future but as yet they have not engaged in collaborative thinking about future economic scenarios and their role as an anchor institution. We have to drop this insularity and integrate ourselves with other local institutions. Health-care can be an engine of Bath's future economic dynamism.

The future of Bath town centre depends on what we do about re-purposing space. It could include pop-up shops for fashion students and local food businesses. Perhaps a collaborative model of social enterprise growth – e.g. Debenhams in Gloucester has been converted to social enterprise and community uses. Bath BID should be supported in becoming more strategic as in Bristol and Cambridge. The Council owns a large slice of the town centre so has to play a leading role in future commercial building management.

A Better Future for Children and all Young People

The interviewees highlighted a number of 'inclusive growth' challenges facing younger people in the BANES area, which need to be researched more thoroughly and acted upon as part of a forward-looking and integrated education and jobs strategy.

Closing the educational attainment gap. Closing class gaps in income, housing and education for families with children, will begin the process of addressing educational attainment gaps. The attainment gap in BANES is largely a function of the large numbers of children in private schools and high performing state secondaries in BANES. Social mobility should be tackled early and holistically, working with schools and families in the most disadvantaged areas in BANES which are already known to the Council and service providers. This is the basic thrust of the St. John's Foundation strategy.

Better starter jobs and apprenticeship opportunities are needed for young people. As low and semi-skilled job opportunities disappear in retail and hospitality, the quality of apprenticeships – and how they are perceived by 16–18 year olds – will become increasingly important. Job opportunities in social care will continue to exist and the NHS excess demand for these posts will be potentially offset by the decline of retail and hospitality but these are low quality jobs subject to low pay. Bath will need more Living Wage employers, and fewer young people working on zero-hour contracts. Town centre businesses are already struggling with recruitment problems at all levels.

Graduate retention has apparently been on the Council's radar for many years, and applies more to the University of Bath, rather than Bath Spa University. The interviewees unanimously believed that the graduate brain drain was a serious issue in Bath, but nobody

Bath will need more Living Wage employers, and fewer young people working on zero-hour contracts

possessed reliable estimates on the size of the problem. Two ways forward seemed to be getting more undergraduates to do placements with local businesses, enhancing the prospect of them staying on in the area – and cultivating alumni networks to attract back Bath graduates as entrepreneurs and mid-career specialists. Bath needs a talent retention and attraction strategy – which requires collaboration and a dedicated lead agency.

Participating Stakeholders Quotations

Bath has a serious problem with child poverty and inequality. So for us, the Build Back Better (BBB) agenda should have tackling disadvantage amongst children and their families as a core priority. BBB should be about strengthening communities across BANES. We are launching a Child Poverty Strategy. Our new 10-year programme – starting with working with seven schools on education attainment inequality – is a long-term commitment.

Businesses wants Bath to be exciting for youngsters and sees it as a route to building a stronger skills base. Due to its over-reliance on hospitality and tourism, the local economy does not generate good quality jobs that will create aspiration for younger people. Why should graduates stay when housing costs are high and good jobs are scarce? The fundamental problem is that there's a long tail of poorly paid insecure jobs and a lack of starter jobs that you can work up with.

The future of Bath are the young people. They will struggle with COVID-19, Brexit and the recession ahead. They won't stay in Bath, unless they are offered good work prospects, affordable housing and great leisure facilities. Bath loses young people to Bristol and with electrification also to London.

This discussion on young people takes us to the role of the University of Bath in helping to build a more resilient local economy that can deliver inclusive growth and sustainable development over the next three years – the expected crisis and recovery period – and the next six years after that, through to 2030. We should emphasise that the University sees itself as a partner anchor institution working in collaboration with businesses, communities and all stakeholders – and in particular, Bath Spa University, Bath College and local schools as one 'learning and education ecosystem' that supports people of all ages and backgrounds.

4

**What Role for
the University
of Bath?**

An Emerging Ecosystem

What does it mean for the University of Bath to be an anchor institution for BANES and for the City of Bath? Some history and context is needed to answer this question. Higher and further education in Bath is dominated by three institutions: the University of Bath, Bath Spa University and Bath College.¹⁶ The University of Bath is a technological university with a strong historical focus on the STEM subjects, having evolved from the Bristol College of Advanced Technology as part of the Robbins Report recommendations of the early 1960s. The University has a leading School of Management and a strong and growing presence in the social sciences. Bath Spa University was created in 1992 as part of the designation of former teacher training colleges and polytechnics into universities. While overlapping with the University of Bath in some areas, it also complements it by specialising more in humanities, letters and fine arts, as well as offering teacher training.¹⁷ Bath College is part of the further education and training sector. It collaborates with the University of Bath along with other local FE colleges by offering feeder and foundation programmes for alternative matriculation pathways. A consistent issue highlighted by the respondents was a lack of linkages between the major post-secondary educational institutions and that Bath would benefit economically and socially from more coordinated action and leadership from these institutions.

The University of Bath and Bath Spa University, reflecting new directions in leadership, have begun to work together in a more cooperative fashion. Both institutions, along with Bath College, are participating in the Economic Renewal and Recovery Board convened by BANES, for example. This kind of collaboration between anchor institutions is an important first step in bringing about the proposed coordination and leadership proposed in this situation report. The potential for stronger collaboration extends more widely. Some of our business interviewees were able to point to strong collaborative links, often based on links with individual academics. Other respondents reported having very little contact with any of the post-secondary institutions in the city. Nearly all those interviewed cited these post-secondary institutions as assets that were not reaching their full

16. This is not to diminish the importance and potential of niche private further educational colleges, including Norland College, Bath Academy of Media MakeUp and at least three language schools (Kaplan, Best in Bath, and Languages United).

17. Note in contrast that the University of Bath made a strategic decision more than ten years ago to withdraw from offering vocational postgraduate teaching qualifications, while retaining a Department of Education with a strong focus on international education, as well as research into educational practices and policy. Its local niche in this and other fields is defined not only in relation to Bath Spa, but also the University of the West of England (UWE). In relation to the health field, for example, the University was keen to invest in doctoral level training of clinical psychologists for the NHS, but not degree level nursing training. Meanwhile it has built research-based strengths in health studies, but not sought to establish a medical school.

potential for local impact. The interviewees perceived scope for the University of Bath to become much more engaged with its surrounding economy and communities.

Participating Stakeholders Quotations

Students play a huge role in the making of places and the University should be more involved in the strategy and direction of the City.

The University of Bath isn't sitting in an ivory tower, they recognise the local community needs and engage to satisfy corporate responsibility but as a cooperative could be doing more for industry.

The University of Bath is now a big property landowner in the City: development should be brave and do things differently, as opposed to just preserving a beautiful city.

The University of Bath could be more visible in some way: students, staff, academics have talent and should make this visible and more relevant to the city they live in.

The University of Bath is a huge engine of possibility.

The University should be more pro-active in engaging with wider Bath: it needs to have a bigger part in the conversation.

The University of Bath needs to be seen to collaborative as a powerful institution but must be careful to work with and not try to control other establishments.

What this brief discussion highlights is the potential dynamic tension between the goal of strong local integration and the goal of achieving and holding onto a reputation as a “world-class university”.¹⁸ The emergence of international rankings, such as the *Times Higher Education* and the “league table” of the UK government Research Excellence Framework (formerly the Research Assessment Exercise) have reinforced the incentives for the the University of Bath to concentrate its efforts not on the local city-region but on these national and international reputation and prestige-seeking exercises. This has influenced the research orientation of the institution and the choice of areas for specialisation. The University of Bath developed a preference

18. See: Altbach, Philip G. and Salmi, Jamil, Eds. (2011). *The Road to Academic Excellence: The Making of World-Class Research Universities*. Washington, D.C.: World Bank Group.

There is renewed interest in local collaboration as a policy, particularly if this can serve as a platform for securing global excellence and recognition

for internationally open recruitment for students and academic staff. This can be seen as an asset to BANES as it connects the local to the national and global but also as a drawback, as the University of Bath's attentions are drawn further afield.

The last decade has seen government funding bodies place growing emphasis on both collaboration with non-academic research partners and evidence of research impact beyond academia. There is renewed interest in local collaboration as a policy, particularly if this can serve as a platform for securing global excellence and recognition. Hence rather than abandoning global ambitions, universities can capitalise on local resources, expertise and assets as a platform for international success – whether that be with British Aerospace for achieving excellence in aeronautical engineering or Aardman Animation in computer science.

Local Perceptions of the University of Bath

While the University of Bath may view itself on a wider canvas, it nevertheless remains rooted in its physical locality. BANES is where most of its academic and non-academic employees live and spend their time and money. The region is a major source for the University of goods and services, and a minor but not insignificant source of potential students, placement opportunities, and graduate jobs. The impact that the University has on the locality is summarised in these institutional profile statistics:

- 15.9% of staff live in BA1 postcodes, 31.7% in BA2 and 55.2% in the wider B&NES area;
- During the academic year over 9,000 students living in and around Bath (BA postcodes) of whom 1,950 are in BA1 and 6,900 in BA2;
- An estimated 150 students undertook placements with locally based placement providers in 2018–19;
- An estimated 1,200 students sign up to do voluntary work with local groups;
- An estimated 3,150 alumni live in and around Bath;
- The University occupies its Claverton Down campus by dint of a 999 year lease initially from the City and now from BANES to whom the University pays an annual peppercorn rent;
- In the Academic Year 2018–2019 14,800 members of the public visited exhibitions at The Edge and over 3,800 attended events, workshops or classes.¹⁹

The University may be pre-occupied with its global research reputation, but local residents understand the institution at the local level and perceive it in relation to educating undergraduates.

19. University of Bath internal data as of 31 January 2019.

Students dominate residents' perception of the University – whether encountered through use of campus sports facilities, at supermarket check-outs, in pubs and night clubs, as tenants or as neighbours. It is a classic town-gown relationship that defines the day-to-day of most university/college towns around the world.

The interviewees suggested that the University of Bath students tend to be perceived as temporary, transient, residents with relatively few remaining in the city after they graduate. The primary 'output' of the institution – high quality 'human capital' – is exported to places with stronger network effects, such as London. Owners of small businesses in the city are as likely to benefit from the University by having a domestic partner working there than through the direct recruitment of students. Several SMEs regretted not having more opportunities to employ or work with University staff and students.

Participating Stakeholders Quotations

The Uni and local business in the tech sector could tap the energy and enthusiasm of students far more than they do: networking and matching with placement students as a route to local employment.

The City lacks the ability to retain talent. Creating suitable places for them to live in the city would greatly strengthen the city. It's crying out for co-living spaces for young professionals that aren't student based, and not riverside apartments either.

It is brilliant being in a city with such good graduates.

It is a problem that successful graduates are moving to London. One way to encourage them to stay longer would be a graduation council tax holiday – not least as a great PR story and symbolic gesture that Bath values this kind of talent.

Some larger local firms do already build on the high-level research coming out of the University of Bath, and have it integrated into their business activity model, particularly in engineering and architecture. Links are harder to build with smaller businesses, who need more support to sustain and build up what may start out as *ad hoc* personal connections. The university innovation centre, near the bus station (Carpenter House) provides an off-campus point of contact for academic researcher spin-offs, and contacts with funding through *Set Squared* and *Innovate UK*.²⁰ The role of the innovation centre is in fostering student-led entrepreneurship. Links between students

20. www.setsquared.co.uk

and local businesses are perceived as limited by many respondents. Bath does have many existing placement arrangements. In some fields Bath Spa University has been more proactive – particularly in the creative industries – while the Guild work hub has established itself without any direct University links.

Participating Stakeholders Quotations

The University is only interested in big companies and research projects, and is not interested in mid-market level. TedX in Bath started three years ago, but has been bankrolled by RWK. The University has never sponsored it.

The small business side has happened in spite of anchor institutions rather than because of them, successful businesses are too busy, and don't miss networks and other forms of support because they've never had it.

University procurement is centralised in the interests of achieving scale – which may be better as less about personal networks. But the downside is supplier relationships tend to be narrower. There is not much incentive to pitch for contracts against already established suppliers.

SMEs could have a space in town or venue where businesses and students meet up. Students are the future of many businesses because they are up with the latest trends and fashions and hence where business is heading.

The best relationships are open and symbiotic relationship – e.g. when we are invited to teaching on courses and get involved with final year research projects.

Bath Spa has a history of being more involved in the local community – e.g. through teacher training and the College of Art. They have been innovative, coming up with creative ideas for community outreach programmes.

Creating a Powerful Local Innovation System: 'The Quadruple Helix'

Moving the university towards a role in promoting social innovation that builds on its position as an anchor institution requires *thinking beyond* the conventional 'triple helix' model of engagement between universities, industry and government. A new 'quadruple helix'^{21,22} model is already being put into practice by the University of Manchester and new universities such as Aalto in Finland. This more expansive and inclusive model *adds users* to the three stakeholders in the original triple helix model. Importantly, it extends the locus of innovation activity from the campus to 'living labs' closer to users – whether they are firms, public sector agencies or community-led organisations.

In order for this quadruple helix model to be effective, a lead anchor institution is needed. The local authority most often takes on this role, but where it is compromised in its ability to do so by other responsibilities, then it may be better assumed by a higher education institution.²³ Such a leadership role would entail the University of Bath taking on a more proactive role in liaising with relevant regional economic development agencies, such as those linked to the Western Gateway, WECA or the LEP. Universities called upon to collaborate in designing and delivering development goals have been referred to by Pawlowski (2009) as "fourth generation" universities.²⁴

This model, which has already been trialled in the UK at the University of Manchester, provides a useful template for the University of Bath to follow as it attempts to balance a desire to maintain prestige and an international reputation and have an active role in the redevelopment and redesign of the local city-region. It is clear

This model, which has already been trialled in the UK at the University of Manchester, provides a useful template for the University of Bath to follow as it attempts to balance a desire to maintain prestige and an international reputation

21. The Quadruple Helix, with its emphasis on broad cooperation in innovation, represents a shift towards systemic, open and user-centric innovation policy. An era of linear, top-down, expert-driven development, production and services is giving way to different forms and levels of coproduction with consumers, customers and citizens. (Arnkil et al., 2010).

22. The shift towards social innovation also implies that the dynamics of ICT-innovation have changed. Innovation has shifted downstream and is becoming increasingly distributed; new stakeholder groups are joining the party, and combinatorial innovation is becoming an important source for rapid growth and commercial success. Continuous learning, exploration, co-creation, experimentation, collaborative demand articulation, and user contexts are becoming critical sources of knowledge for all actors in R&D & Innovation". (ISTAG, 2011: 119).

23. "Where there is weak city leadership, ineffective partnerships and lack of a shared vision, the university may need to take a leadership role and over the long term help other public and private institutions in the city and beyond to build their capacity to absorb knowledge generated within the academy, to co-produce knowledge and articulate knowledge demands." (GUNI 6: 127). See also discussion of this changing role for universities within the European Universities Association, of which the University of Bath is a member. (Reichert, 2019).

24. The other generations are associated with (i) their traditional educational role, (ii) conducting scientific research, and basing its education on such research, (iii) creating value by helping start-ups and initiating market innovations. In other words, the fourth generation university abandons a linear view of its functions within a complex but given environment in favour of seeking to influence this wider 'eco-system'. It acquires a double role as both a producer of knowledge and a cultural actor facilitating regional interaction. By bringing a wide range of disciplinary expertise together, universities become orchestrators of regional connectivity. (Reichert, 2019: 12–13).

from the interviews with anchor institutions and businesses in the city-region of Bath, that the university is seen as a key stakeholder and by many of a critical asset to their activities, commercially and socially. It is also clear that the university's strongest links are those which were formed during its early history, when the regional and commercial engagement impetus of the institution was at its strongest. Recent decades have seen a divergence between the goals of the city of Bath and those of the University but that there is a real desire on the part of many actors in the local society and economy to revitalise those linkages and establish future pathways.

Participating Stakeholders Quotations

We can do better with investment in alternative sectors like environmental and health technology that will drive future job growth.

Could the University of Bath form a subscription based mini conference hub for joining international conferences, utilising the University of Bath's technology?

Could the University sponsor a research, architecture and public policy forum to stimulate outside-the-box discussions of office space 4.0 in Bath?

The failed collaboration with Dyson to establish a high-quality independent training facility in the heart of the city would have encouraged cluster effects – maybe a Tesla?

The extraordinary requirements and challenges of COVID-19 has the opportunity to place the University of Bath back at the heart of the place-based recovery debate. Existing tools, models and structures exist and have been successful in both the UK and the rest of the world, but they all require leadership. In the context of Bath, it is becoming clear that the University of Bath, in tandem with Bath Spa University and Bath College, are well placed to provide some of the leadership needed for the redevelopment of Bath post-COVID-19.

5

Conclusion

COVID-19 has placed pressures on the Bath economy that require coordinated responses with anchor institutions working together to achieve the objectives of reconstruction. This cross-sector conversation about the future shape of the Bath economy and its governance is positive but it is essential this conversation takes account of the needs of the youngest and most vulnerable citizens of BANES. Our interviews provide a good starting point for understanding the current situation in Bath and possible routes to a future of shared and sustainable prosperity. They say that the routes to resilience and a sustainable and inclusive economic future for Bath requires that everybody pulls and works together.

First, Bath’s leading public sector players should act as ‘bona fide’ anchor institutions. They should publish strategies and action plans that clearly specify how they will collaborate and use their economic power and influence for the benefit of local businesses and local communities. These ‘anchor institutions’ should include the two universities and Bath College, BANES local authority, CURO the Housing Association, and the NHS and its hospitals. A new report by the National Organisation for Local Economies (CLES)²⁵ and the National Housing Federation provides an anchor institution toolkit for housing associations.²⁶ About 40% of Bath’s workforce and job-creation would be touched if public anchor institutions fully played out their roles in place-based development and community wealth-building. Nationally there is a lot of talk about anchor institutions – but what we need now is action.

Second, Bath’s resilient growth strategy should exploit the goodwill shown by businesses for communities during the pandemic. An excellent new report by the Centre for Progressive Policy²⁷ refers to ‘the business of belonging: how can we drive an inclusive recovery through connection to place’. CPP’s national survey of 600 large and small businesses showed that whilst 67% of businesses felt greater social responsibility in response to the COVID-19 crisis, only 20% consider their local impact on communities. CPP’s recommendations are worth mentioning – see table on the next page.

25. <https://cles.org.uk>

26. CLES/NHF, Toolkit: Housing Associations as Anchor Institutions <https://cles.org.uk/publications/housing-associations-as-anchor-institutions-toolkit>

27. www.progressive-policy.net/publications/the-business-of-belonging

**Table 1: Centre for Progressive Policy
Recommendations Applied to Bath**

For BANES Council its Regional Partners (WECA)	For Local Businesses
<p>Creating a private-sector led recapitalisation fund for struggling but otherwise viable businesses as part of the new industrial strategy, with investment dependent on businesses' commitment to meeting community objectives.</p> <p>Funding the creation and survival of social enterprises, which already embody the principle of belonging with their social mission giving them a strong connection to place.</p> <p>Developing a clear framework for measuring social impact, working to build a consensus around measurement so that businesses' social contribution can be transparently and comparably assessed.</p>	<p>Secure social value for the local economy through their supply chains, following the example of the Cabinet Office's recently published social value model.²⁸</p> <p>Agree and commit to mutually beneficial local social objectives with local government and the wider community, building on existing examples of collaboration such as the Wigan Deal for Business or the Bristol One City Plan.</p> <p>Pay the real living wage, as set out by the Real Living Wage Foundation and restrict the use of zero-hours contracts to reduce adverse consequences of insecure employment for society.</p>

Third and relatedly, Bath can and should do more to build a dynamic and resilient small business sector based on cluster growth strategies in the areas of specialist professional services, health-care, creative and digital technologies and green technologies. We welcome the 'Bath Unlimited'²⁹ initiative aimed at larger global firms. We would like to see the latter become 'flagships' for developing clusters of small firms and start-ups through knowledge transfer, localised supply chains and sponsorship of skills and management development. The notion of these corporations being 'of' the community versus 'in' the community has become increasingly critical as local business struggle to cope with the pandemic and

28. Please see the following: www.bristolonecity.com/ and www.wigan.gov.uk/Council/The-Deal/index.aspx & www.kingsfund.org.uk/projects/lessons-wigan-deal

29. <https://bathunlimited.org> & www.bath.ac.uk/announcements/bath-unlimited-goes-live/ bathunlimited.org details and promotes the achievements of some of the area's biggest and most successful companies. It forms part of the 'Bath Unlimited' campaign designed to support 'Invest in Bath' in attracting new inward investment by increasing awareness of the area's flourishing businesses and promoting the wealth of talent and expertise in the local workforce. The concept of 'Bath Unlimited' arose from conversations at the Economic Recovery and Renewal Partnership. The campaign, which launched today (Thursday 1 October), is a collaboration between Bath & North East Somerset Council, law firm Royds Withy King, brand and design agency Mytton Williams and the University of Bath.

Our data annex spotlights the unacceptable situation facing many of Bath's young people, who are hardest hit by COVID-19 in terms of unemployment and 50% concentrated in low-pay sectors

its consequences.³⁰ Anchor institutions can also come from the private sector. We need the concept of 'Bath Unlimited' to extend to successful SMEs that are Bath's '*diamonds in the rough*'. SME uplift policies would touch on 95% of the local business population. We include social and community businesses in our definition of Bath's small business sector. They have been galvanised by the COVID-19 crisis and are central to the place-based inclusive growth agenda – right across BANES.

Fourth, Bath needs a holistic strategy aimed at enabling all young people and children living and working in the area to flourish now and in the future. This strategy needs to focus on young people from disadvantaged backgrounds in particular and must cut across the various tiers of education, all employers in the labour market and community development in Bath's most deprived areas. Bath's young people, are amongst the hardest hit by COVID-19 in terms of unemployment with 50% concentrated in low-pay sectors. Child poverty afflicts 20% of Bath households and too many children from marginalised communities have little hope of entering higher education – the social mobility gap from school to university within BANES is amongst the worst of all local authority districts. High time for radical change – following the example set by St. John's Foundation – and everyone in Bath needs to share this mission. An inclusive growth strategy for young people would touch 33% of Bath's residents – and nearly 50% of its total 2050 population.

Fifth, Bath should use the UN Sustainable Development Goals (SDGs) as a framework for creating a local impact management and measurement system for tracking and reporting its progress towards achieving more inclusive and sustainable prosperity. The Local Government Association recommends that councils – BANES in this case – use the UN Sustainable Development Goals (SDGs) as a basis for designing local impact management frameworks. The SDGs are gaining recognition across the public sector, corporates and investors and the social economy. Bristol has already declared its commitment to delivering the SDGs locally, and every 'One City Plan' goal has been mapped to them. Presumably, Bath's One City Plan – prepared by the same consultant – will also use the SDG framework. It is important that Bath develops its own local knowledge and intelligence to support its inclusive and sustainable growth strategies. We found in our background research that there are data vacuums in key areas – for example, skills and young people in the labour market (including graduate development paths), the performance and profiles of the small business population and place-based inequalities with BANES and community wealth-building activity.

30. Barry Ostrowsky and Michellene Davis, 'Four ways anchor institutions can support local and diverse businesses', Forbes, 2 September 2020 www.forbes.com/sites/forbesbooksauthors/2020/09/02/four-ways-anchor-institutions-can-support-local-and-diverse-businesses/#132d8ad16dce

The Local Government Association and the UK Stakeholders for Sustainable Development have published a guide to help councils engage with the United Nations Sustainable Development Goals (SDGs) at a time when many are starting to re-think the role of local government in leading places and empowering people.³¹

Sustainable Development Goals (SDGs)




31. UN Sustainable Development Goals: A Guide for Councils 2020, www.local.gov.uk/lga-and-ukssd-launch-sustainable-development-guide-councils


Sixth, The University of Bath can and should play a leading role to play in supporting these initiatives. While the University of Bath has established a strong national and international reputation, building on this need not and should not entail neglecting the role it can play within its own locality. In contrast, there is growing recognition that the best universities are proactive in supporting local initiatives and leveraging place-specific resources and opportunities. The key to this is to forge collaborative links with local businesses and organisations that entail co-production of knowledge in response to users' needs and priorities. Such 'public engagement' can draw upon and enrich core teaching activities and be research intensive.

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