Tameside Economic Baseline



A Final Report

Tameside Metropolitan Borough

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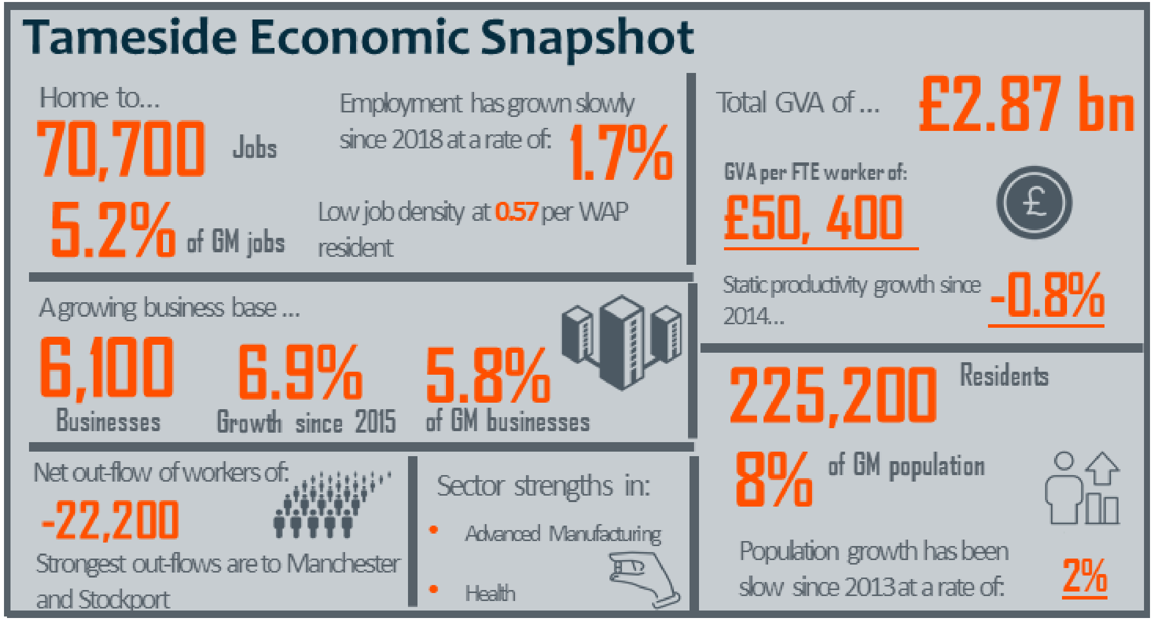
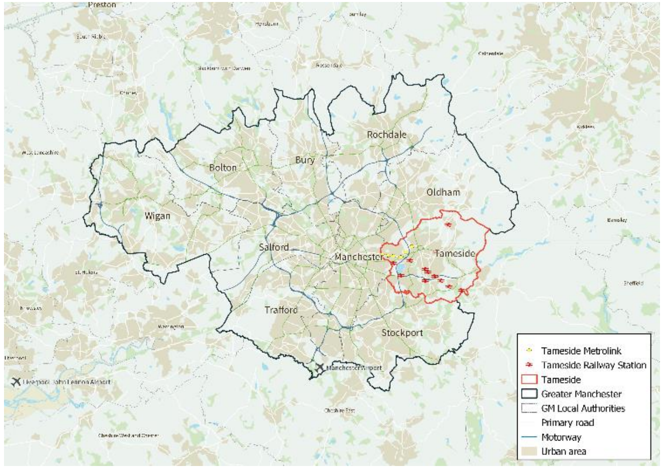
Executive Summary

Tameside: Socio-Economic Snapshot

Tameside is strategically positioned within the Greater Manchester city region and on the doorstep of the Pennines.



Source: UK Business Counts, 2015-2019;; Business Register and Employment Survey, 2015-2019; ONS Population Estimates, 2013-2018



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Summary SWOT Analysis…

Five Defining... **Strengths**

1. Proximity and positioning of Tameside within the Greater Manchester city region as a driver of growth
2. Sectoral strengths in GM identified opportunity sectors including Advanced Manufacturing & Engineering and Health Innovation
3. Excellent connectivity including digital infrastructure and strategic transport infrastructure as a driver of growth
4. Quality of life offering including attractive historic towns with access to the Pennines countryside
5. Improving education offer characterised by good and outstanding ratings and continued investment in Further Education provision

Five Defining... **Weaknesses**

1. Pervasive productivity challenges which inhibit Tameside's growth potential
2. A shortage of local jobs and a lack of quality sites and premises to attract and retain investment
3. Labour market deficiencies stymying effective demand and supply interaction and holding back productivity
4. A low entrepreneurial culture and the need for supporting infrastructure to facilitate entrepreneurship and innovation
5. Deep-rooted inequalities which limit life chances, health and prosperity

Five Defining... **Opportunities**

1. Enhanced place proposition to drive growth through a network of towns and capitalise upon proximity to city and natural capital
2. Enhanced connectivity (transport and digital) to facilitate access to employment and stimulate entrepreneurship
3. Major developments including new housing developments, employment sites (especially Ashton Moss and St. Petersfield) and local transport investments presenting supply chain and investment opportunities
4. Securing investment in opportunity sectors including Advanced Manufacturing & Engineering and Health Innovation and driving competitiveness through digitalisation, upskilling and innovation
5. Levering anchor institutions and the role of public procurement in driving good growth outcomes

***Five Defining...*Threats**

1. Macro economic factors including the uncertainties created by EU exit and the recent global pandemic
2. Demographic change is contributing to an ageing population in Tameside and a forecast decline in the working age population is anticipated, tightening labour supply and placing pressure on services
3. Technology and innovation are disruptive forces which Tameside need to embrace to maintain competitiveness
4. Competition for growth and investment elsewhere in GM and the UK is undermining Tameside's ability to retain and secure investment
5. Infrastructure constraints will impact on Tameside's ability to secure investment and enable equitable access to economic opportunities

Implications for the Inclusive Growth Strategy

The review of the economic evidence for Tameside has highlighted a number of areas of focus for the emerging Inclusive Growth Strategy. These are:

Infrastructure – maximising Tameside's strategic positioning to enable residents and businesses access higher value opportunities through affordable, efficient and sustainable transport; and levering the competitive edge presented by Tameside's digital infrastructure through digital-led inclusive growth. Opportunities to deliver a major new employment development at Ashton Moss focused on advanced manufacturing and materials and St. Petersfield as the hub of digital driven business. A need to diversify the borough's stock, bring more family housing and higher value development to support the borough's economy.

People – enable everyone to benefit from Tameside's economic growth through attracting and retaining talent; upskilling residents and workers to access quality employment opportunities; expanding HE offer to retain and attract young people; building connections with GM universities; enhancing digital skills and leadership and management skills

Places – developing Tameside's place proposition as a place to invest, live and work; facilitating vibrant mixed use town centres as a destination for investment; delivering sites and premises to attract and retain investment and grow local jobs offer

Business environment – position Tameside to drive productivity and competitiveness in GM opportunity sectors including AME and health; strengthening local supply chains to maximise growth opportunity; driving resilience of businesses to change through business support; encourage business start-up; deliver social value and lever anchor institutions to support good growth objectives

Ideas – invest in innovation, technology and skills to drive competitiveness; embrace disruptive forces to drive change and harness opportunity

Introduction

Purpose

This report provides an Economic Baseline Study of Tameside drawing on the most recent information as of February 2020, benchmarking the Borough against other local authorities within Greater Manchester, the sub-region and national position. The purpose of the study is to:

+ Characterise the state of the Tameside economy
+ Identify the sectors driving growth in the Tameside economy and the role Tameside can play in facilitating growth aspirations of Greater Manchester's identified opportunity sectors
+ Shine a spotlight on the strengths and opportunities presented by the borough
+ Explore the implications arising for the implementation of the GM Local Industrial Strategy and emerging Tameside Inclusive Growth Strategy

The report is accompanied by a Microsoft Power BI interactive baseline tool.

Tameside Economic Baseline Study Components

Secondary Data Analysis

Policy & Literature Review

Strategic Consultations

Asset Audit

Economic Baseline Report & Data Tool

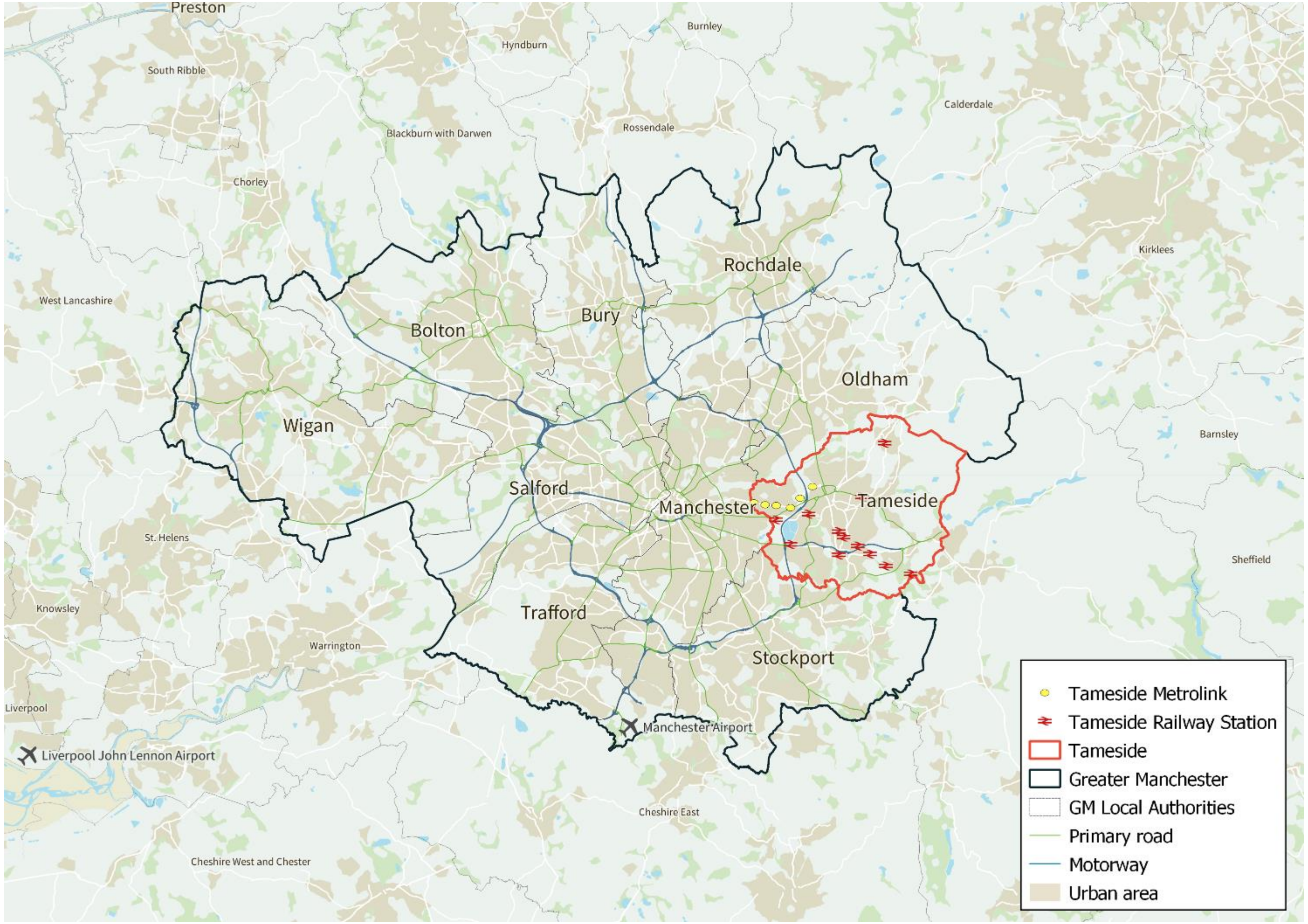
Geographies

The primary geography for the Tameside Economic Baseline Study is the Tameside Metropolitan Borough.

To provide context, the performance of Tameside is benchmarked against the Greater Manchester Combined Authority (GMCA) area and the national average.

In addition, the remaining 9 local authorities within the GMCA and adjoining local authority of High Peak have been selected to help contextualise Tameside's performance and positioning: Stockport, Rochdale, Oldham, Bury, Bolton, Wigan, Salford, Manchester and Trafford.

Performance against these comparators is considered throughout the analysis in the report.



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Strategic Context

Strategic Context (1)

The Tameside Economic Baseline Study is informed by the prevailing policy environment as summarised below.

UK Industrial Strategy, 2017

The UK Industrial Strategy seeks to create an economy that boosts productivity and earning power throughout the UK, underpinned by five foundations of productivity:

+ Ideas – the world's most innovative economy
+ People – good jobs and greater earning power for all
+ Infrastructure – delivering a major upgrade to the UK's infrastructure
+ Business Environment – the best place to start and grow a business
+ Places – providing prosperous communities across the UK

The Industrial Strategy responds to four identified grand challenges:

+ Putting the UK at the forefront of the AI and data revolution
+ Maximising the advantages for UK industry in the global shift to clean growth

Becoming a world leader in shaping the future of mobility

+ Harnessing the power of innovation to help meet the needs of an ageing society
+ Tameside has a role to play in closing the productivity gap that exists in the UK.

Northern Powerhouse Strategy, 2016

The Northern Powerhouse Strategy establishes a vision for "*joining up the North's great towns, cities and counties, pooling their strengths, and tackling major barriers to productivity to unleash the full economic potential of the North*".

Relevant priorities include:

+ Improving connections between towns and cities in the North
+ Improving educational standards and skill levels across the region
+ Ensuring the North continues to be an excellent location to undertake R&D, develop innovative ideas and start and grow a business

Strategic Context (2)

Identified **strengths** of the North include manufacturing, pharmaceuticals, energy and digital sectors.

Identified **challenges** of the North include lagging productivity compared to the South; poor connectivity limiting the reach of northern cities' labour markets, wages and productivity; lagging innovation and enterprise; and a lower proportion of highly skilled workers.

Transport for the North, Strategic Transport Plan, 2019

The Strategic Transport Plan establishes a vision of a "*thriving North of England, where world class transport supports sustainable economic growth, excellent quality of life and improved opportunities for all*". The plan seeks to better connect people, business and markets thereby:

+ Transforming economic performance
+ Increasing efficiency, reliability, integration and resilience in the transport system
+ Improving inclusivity, health and access to opportunities
+ Promoting and enhancing the built, historic and natural environment

The STP seeks to deliver improved rail links between major towns and cities, encouraging investment in rail lines, stations and services; strengthen major road networks; improve local and sustainable transport; and facilitate integrated and smart travel.

Greater Manchester Local Industrial Strategy, 2019

Building on the findings of the Greater Manchester Prosperity Review, the LIS seeks to position GM as:

+ A global leader of health and care innovation
+ A world-leading city region for innovative firms to experiment, develop and adopt advanced materials in manufacturing
+ A leading European digital city region enabling digitalisation across all sectors
+ A carbon neutral city by 2038

Key sectors include health innovation; advanced materials and manufacturing; digital, creative and media; and clean growth.

Identified challenges include lagging productivity levels across sectors and the economic, social and spatial disparities that exist within the city region.

Strategic Context (3)

Priorities include:

- **Ideas** – work with UKRI to maximise investments in innovation assets, drive take up of R&D;
- **People** – connect national and local policies for the post-16 and work system;
- **Infrastructure** – explore options for sustainable, long-term local investment into infrastructure;
- **Business environment** – strengthening GM's programmes that support businesses to improve productivity;
- **Places** – addressing barriers to participating in employment and accessing opportunities.

Proposed activity which Tameside has a strong alignment with includes:

- Development of the Pankhurst Centre for Research in Health, Technology and Innovation
- Deeper partnerships to ensure the education, skills and work system can support people to reach their potential and improve access to skills
- Create further opportunities to develop 5G networks and test beds
- Enabling more local businesses to access existing business support programmes
- Town centres, including Ashton-under-Lyne, supported to provide a stronger focus on local economic activity
- Proposed development of an 'Advanced Materials City' in the M62 North East Corridor

Greater Manchester Strategy: Our People, Our Place

Ten priorities underpin the vision to "*make GM one of t he best places in the world to grow up, get on and grow old*":

1. Children starting school ready to learn
2. Young people equipped for life
3. Good jobs with opportunities for people to progress and develop
4. A thriving and productive economy in all parts of GM
5. World class connectivity that keeps GM moving
6. Safe, decent and affordable housing
7. A green city region and a high quality culture and leisure offer for all
8. Safer and stronger communities
9. Healthy lives with quality care available for those who need it
10. An age-friendly city region

Strategic Context (4)

GMCA Infrastructure Framework 2040

The Infrastructure Framework seeks to develop and maintain a holistic infrastructure system that is robust, accommodates sustainable growth and supports the ambitions of the Greater Manchester Strategy. It focuses on physical infrastructure including energy, transport, digital, water, and green and blue infrastructure.

Relevant priorities for Tameside include low carbon heat; capacity, connectivity and diversity of transport networks; pervasive, affordable and resilient digital connectivity; and collaboration; funding and resilience. As Tameside delivers housing and employment growth there needs to be a corresponding investment in the performance of supporting infrastructure.

GM Population Health Plan, 2017-2021

The Health Plan seeks to achieve the greatest and fastest improvement to the health, wealth and well-being of the 2.8m people who live in GM. Identified challenges include a growing ageing population, significant health inequalities, below average life expectancy. Supporting localities to build and test an approach to work and health that integrates health, employment and other services is a key objective.

Tameside Corporate Plan 'Our People Our Place Our Plan'

Tameside Council and NHS Tameside & Glossop CCG have come together to form one organisation 'Tameside & Glossop Strategic Commission'. A new Corporate Plan has been developed that reflects the priorities and guiding principles for joint working in the area.

The plan is structured by life course – Starting Well, Living Well and Ageing Well, underpinned by ensuring that Tameside & Glossop is a Great Place and has a Vibrant Economy. There are 8 strategic priorities:

1. Very best start in life where children are ready to learn and encouraged to thrive and develop
2. Aspiration and hope through learning and moving with confidence from childhood to adulthood
3. Resilient families and supportive networks to protect and grow our young people
4. Opportunities for people to fulfil their potential through work, skills and enterprise
5. Modern infrastructure and a sustainable environment that works for all generations and future generations
6. Nurturing our communities and having pride in our people, our place and our shared heritage
7. Longer and healthier lives with good mental health through better choices and reducing inequalities
8. Independence and activity in older age, and dignity and choice at end of life

The Tameside Economic Baseline will inform the development of a number of strategies, including an Inclusive Growth Strategy for the Borough.

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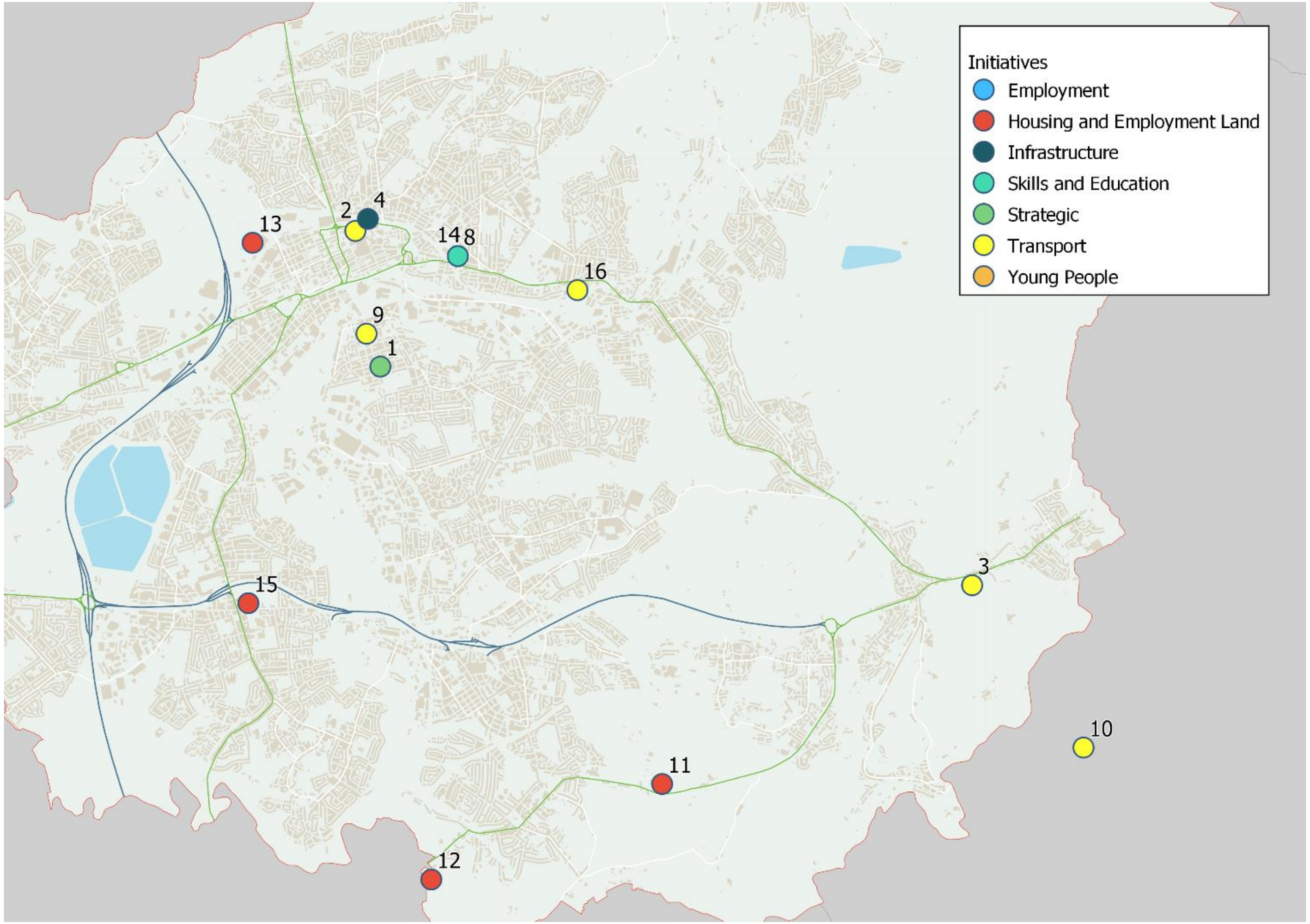
Strategic Context (5)

Major Initiatives in Tameside - Mapped

No.	Initiative	Focus
1	Care Together Programme	Strategic
2	Ashton Interchange	Transport
3	Trans-pennine Upgrade (Mottram Bypass)	Transport
4	SWIFT Free Wifi in Town Centres	Infrastructure
5	Tameside Dark Fibre Network	Infrastructure
6	Tameside Employment Fund (Youth Employment Scheme and Business & Trade Grant)	Employment
7	Working Well Health Pilot	Employment
8	Tameside Hack	Young People
9	New Train Station at Dewsnap in Dukinfield - proposed	Transport
10	New Train Station at Gamesley	Transport
11	Godley Green Garden Village	Housing and Employment Land
12	South of Hyde - 440 homes, new garden village	Housing and Employment Land
13	Ashton Moss West - 175,000 sqm employment space, Metrolink proposal	Housing and Employment Land
14	Vision Tameside Project	Skills and Education
15	Denton Oldham Batteries site - proposal to build 200 homes	Housing and Employment Land
16	Extension of Ashton Metrolink to Stalybridge	Transport



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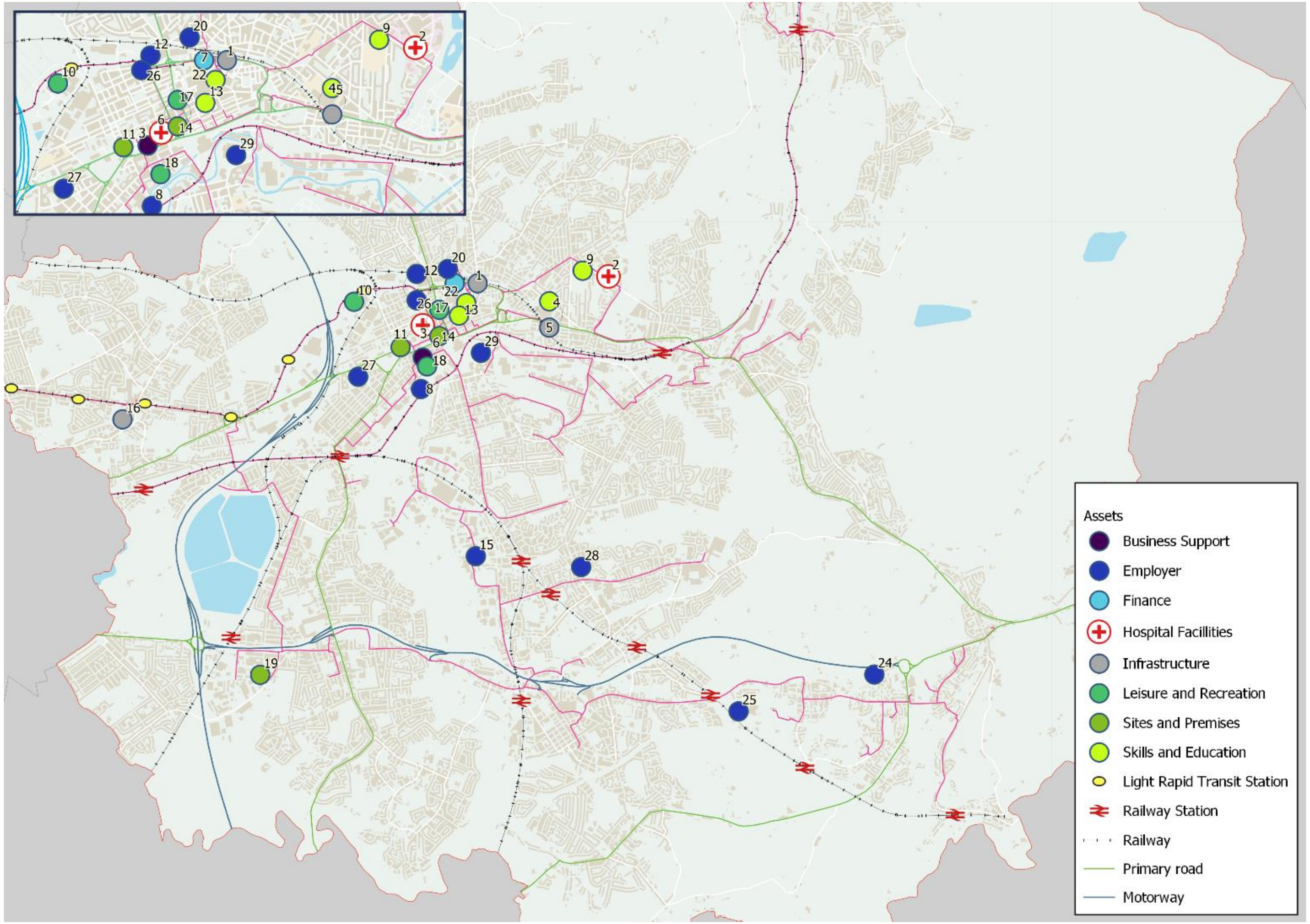
Strategic Context (6)

Key Assets in Tameside – Mapped

Number	Asset Name	Asset Category
1	Clarendon Sixth Form College	Skills and Education
2	Tameside General Hospital - Tameside and Glossop Integrated Care NHS Foundation Trust	Hospital Facillities
3	Ashton Old Baths	Business Support
4	Tameside Co-operative Network Infrastructure	Infrastructure
5	Tameside College	Skills and Education
6	Pennine Care NHS Foundation Trust	Hospital Facillities
7	Tameside Council	Infrastructure
8	Barcrest Group (acquired by Scientific Games Corporation)	Employer
9	Ashton Sixth Form College	Skills and Education
10	Ashton Moss Leisure Park	Leisure and Recreation
11	St Petersfield Business Quarter	Sites and Premises
12	Ikea	Employer
13	Tameside One - Advanced Skills Centre and Joint Public Service Centre	Skills and Education
14	Tameside Centre for Enterprise	Sites and Premises
15	Newland Engineering	Employer
16	Droylsden Marina	Infrastructure
17	Central Art Gallery	Leisure and Recreation
18	Portland Basin Museum	Leisure and Recreation
19	Tameside Business Park	Sites and Premises
20	Energy Gain UK	Employer
21	Cooperative Network Infrastructure Ltd	Infrastructure
22	Tameside and Glossop Community Credit Union	Finance
23	Denton Leisure Centre (in development)	Leisure and Recreation
24	Envirolab	Employer
25	Kerry Foods	Employer
26	Great Academies	Employer
27	Hill Biscuits	Employer
28	Findel Education	Employer
29	Tulip (Foods)	Employer



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Tameside: Assets & Opportunities

The Borough of Tameside lies to the east of Greater Manchester, stretching from the east of the City of Manchester to the moors of the Peak District. Tameside borders Oldham, Manchester, Stockport and the Derbyshire Borough of High Peak. The Borough has a mix of urban and rural landscapes, including the towns of Ashton-under-Lyne, Audenshaw, Denton, Droylsden, Dukinfield, Hyde, Longdendale, Mossley and Stalybridge. Tameside is strategically located and well served by the M60 and M67 motorways and rail and metro links.

Tameside has a number of assets which support economic growth in the Borough. These include:

+ **Skills and Education** including Tameside College offering the Advanced Technology Centre and the Centre for Construction Skills and various Sixth Form Colleges including Ashton Sixth Form College which is recognised as outstanding in all areas by Ofsted
+ **Anchor institutions** which make a significant contribution to the Tameside economy as large employers with significant purchasing power; holders of land and property assets; and a tendency to operate not-for-profit. For example, Tameside Council, the Tameside and Glossop Integrated Care NHS Foundation Trust, Greater Manchester Police and Fire Rescue Service, and Further Education colleges
+ **Key employers** such as Barcrest Group, Ikea, Newland Engineering, Energy Gain UK, Envirolab, Kerry Foods, Hill Biscuits, and Tulip (Foods)
+ **Social enterprises and cooperatives** such as the Tameside Co-operative Network which provides a cooperative model of delivery which responds to local need and respond to particular gaps in the market
+ **Digital infrastructure** including the Tameside Dark Fibre Network and the Tier 3 Data Centre at Ashton Old Baths
+ **Employment sites and premises** including Tameside Business Park, Ashton Old Baths, Tameside Centre for Enterprise, St Petersfield Business Quarter and proposed developments at Ashton Moss and Hattersley Science and Technology Park
+ **Leisure and recreation facilities** such as Ashton Moss Leisure Park, Central Art Gallery, Portland Basin Museum and Droylsden Marina and the natural capital offer presented by the Pennines

Economic Profile

Introducing the Economy - Productivity

Tameside generates a GVA of £2.87** billion per annum, which equates to £50,400 per FTE worker. This is comparatively low compared to the Greater Manchester and national average of £56,600 and £66,300 respectively. On the measure of GVA per FTE worker, Tameside's productivity gap compared to the City Region is currently around 11% and 24% compared to England.

Summary of the Tameside Economy

	Tameside	GM	England
No. of Jobs, 2018*	70,700	1,366,500	26,840,800
Employment change (2013-2018)	1.7%	12.8%	8.7%
No. of businesses, 2019*	6,100	104,100	2,360,800
Business change (2015-2019)*	+395 (6.9%)	+17,500 (20.2%)	+244,500 (11.6%)
GVA, 2018**	£2.87 billion	£62.6 billion	£1.42 trillion
GVA per FTE worker**	£50,400	£56,600	£66,300
Productivity growth (2014-2018)**	-0.8%	7.7%	10.8%

Source: UKBC and BRES, Regional GVA (Balanced), ONS 2019

*Figures rounded to nearest 100
**Real estate activities removed

Introducing the Economy - Productivity

GVA by Industry, 2017 (£m)

The top five contributors to Tameside's GVA are:

- Human health and residential care activities (£442m and 15% of total)
- Manufacture of wood, petroleum, chemicals and minerals (£300m and 10% of total)
- Retail trade (£249m and 9% of total)
- Education (£235m and 8% of total)
- Public administration and defence (£192m and 7% of total)

Employment activities; tourism and security services
Services to buildings and landscape activities
Membership organisations; repair of household goods
Households as employers and own use production
Head offices and management consultancy

Source: ONS Regional Gross Value Added (Balanced) by Industry

Tameside Metropolitan Borough

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Introducing the Economy - Productivity

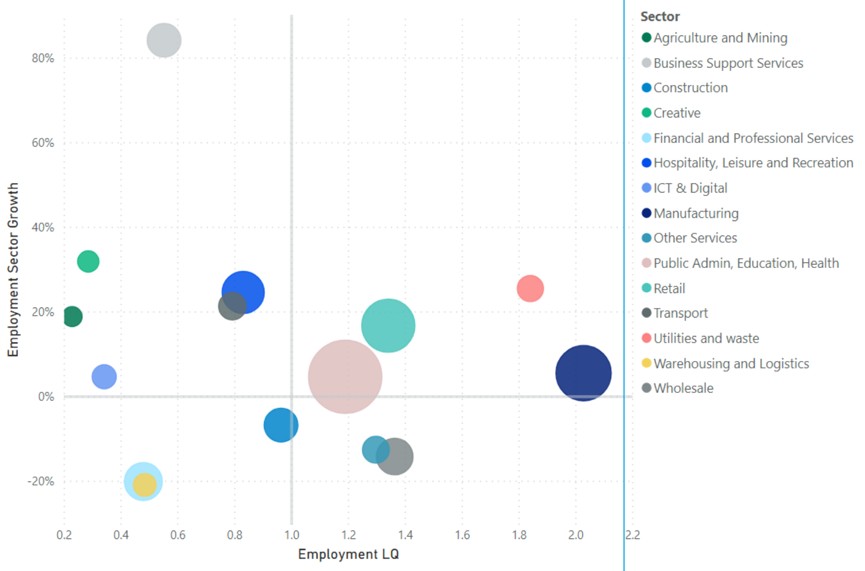
Source: Regional GVA (Balanced), BRES, ONS (2019)

Sector*	Tameside GVA per FTE Employee	% share of overall GVA	GVA gap between Tameside and England (minus London) by sector	Change in sector GVA (last 5 years) %
Agriculture, mining, electricity, gas, water and waste	£53,676	2.5%	-55%	-15.1%
Manufacturing	£52,891	20.0%	-33%	-4.0%
Construction	£65,862	6.7%	-22%	15.1%
Wholesale and retail trade; repair of motor vehicles	£38,519	14.9%	-28%	-6.1%
Transportation and storage	£43,099	3.1%	-17%	25.4%
Accommodation and food service activities	£29,194	2.7%	-7%	14.9%
Professional, scientific and technical activities (including financial and digital)	£45,700	6.5%	-40%	-10.1%
Administrative and support	£60,461	6.2%	41%	71.8%
Public administration, education, health	£59,228	34.8%	14%	30.8%
Arts, entertainment and other services	£36,150	2.7%	-41%	8.5%
Overall	**£50,400**	**100%**	**-17%**	

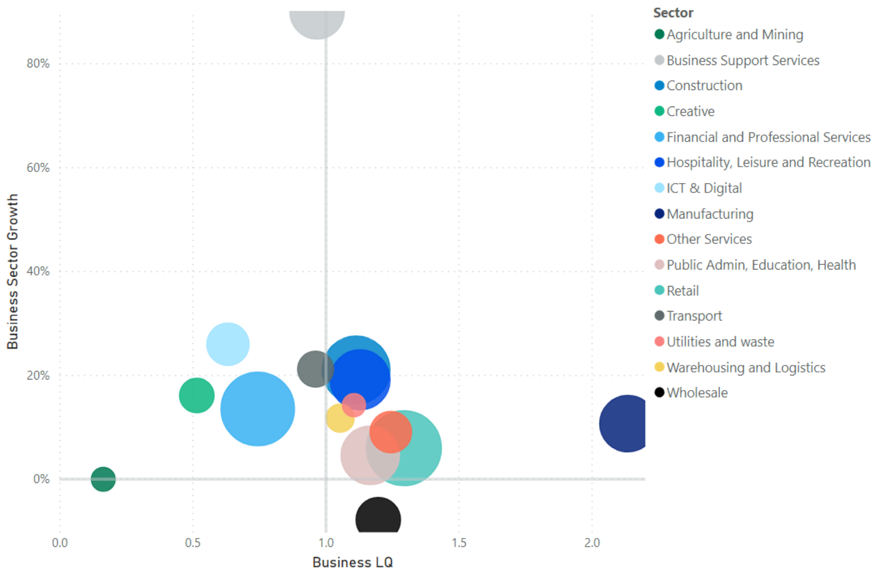
*Real estate activities removed

Introducing the Economy – Sector Composition

Tameside Employment Strengths (2013-18)



Tameside Business Strengths (2014-19)



Source: UKBC and BRES, ONS (2019)

Introducing the Economy – Sector Composition

Approximately 71,000 people are currently employed in Tameside, with around 6,140 businesses located in the borough.

Tameside accounts for 5% of all employment in Greater Manchester and is home to 5.9% of the GM business base.

Tameside's economy has been growing steadily, with 1,200 (+2%) more jobs in the area compared to 2013, and 850 (16%) more businesses since 2014.

Tameside has a number of sector specialisms which are important to the economy in both absolute and relative terms, and have experienced recent employment growth:

+ **Public admin, education and health** (21,130 employed, LQ of 1.2 and +4% growth)
+ **Manufacturing** (11,320 employed, LQ of 2, and +5% growth)
+ **Retail** (10,475 employed, LQ of 1.3 and +15% growth)
+ **Utilities and waste** (1,450 employed, LQ of 1.8 and +26% growth)

The knowledge economy* accounts for 8.3% of all employment in Tameside. This decreased by -6.5% between 2013-18, in contrast with approximately 14% growth in both England and Greater Manchester over the same period.

Sector	Business				Employment			
	UK Business Count				BRES			
	2019			Change 2014-19	2018			Change 2013-18
	No.	%	LQ		No.	%	LQ	
Agriculture and Mining	45	1%	0.2	0%	220	0.3%	0.2	19%
Business Support Services	390	6%	1.0	59%	3,325	5%	0.6	68%
Construction	895	15%	1.1	19%	3,260	5%	1.0	-8%
Creative	175	3%	0.5	13%	475	1%	0.3	31%
Financial and Professional Services	960	16%	0.7	17%	4,605	6%	0.5	-27%
Hospitality, Leisure and Recreation	570	9%	1.1	21%	5,975	8%	0.8	20%
ICT & Digital	300	5%	0.6	25%	890	1%	0.3	5%
Manufacturing	565	9%	2.1	6%	11,320	16%	2.0	5%
Other Services	275	5%	1.2	15%	1,500	2%	1.3	-20%
Public Admin, Education, Health	365	6%	1.2	20%	21,130	30%	1.2	4%
Retail	865	14%	1.3	8%	10,475	15%	1.3	10%
Transport	180	3%	1.0	33%	1,675	2%	0.8	20%
Utilities and waste	30	0%	1.1	20%	1,450	2%	1.8	26%
Warehousing and Logistics	80	1%	1.1	14%	645	1%	0.5	-21%
Wholesale	320	5%	1.2	-3%	4,215	6%	1.4	-15%
TOTAL	6,140	100%	1.0	16%	71,000	100%	1.0	3%
Knowledge Economy	*1,475*	*24%*	*0.7*	*23%*	*5,870*	*8%*	*0.4*	*-7%*

*see Appendix A for Knowledge Economy/Knowledge Intensive Employment SIC definition

Introducing the Economy – Sector Composition

Core Sectors

The analysis indicates the key sectors which are fundamental to Tameside's economy either in size or specialisation:

+ **Public administration, education and health**
+ **Manufacturing**
+ **Retail**

Wider Opportunity Sectors

Sectors which currently have a comparatively small presence in employment terms, but are strategically important or have future growth potential in the future include:

+ **Visitor economy**
+ **Business Support Services**
+ **Transport**

Emerging Niche Sectors

Sectors which currently employ relatively few people within Tameside and are under-represented, but have experienced recent rapid growth include:

+ **Creative**
+ **ICT and Digital**

Vulnerable Sectors

Sectors which are important in employment terms, may or may not have a degree of specialisation, but have experienced recent employment decline include:

+ **Wholesale**
+ **Construction**
+ **Financial and professional services**

Introducing the Economy – Competitive Position

Despite experiencing steady employment growth over time, it is notable that Tameside has secured the lowest level of employment growth in the past five years compared to other GM authorities. Other challenges include a low representation of higher level skills; below average productivity per FTE; and relatively low business birth rates.

However, Tameside does have a reasonably strong employment rate (rank 5 out of 10) and the business growth rate over the past five years has been fairly strong compared to the experiences of Wigan, Stockport and Trafford.

Rank	Employment Rate	Employment Growth	Business Growth	Businesses Births per 1,000 residents	Businesses per 1,000 residents	GVA per FTE	% with Higher Level Skills*
1	Stockport	Manchester	Salford	Manchester	Trafford	Manchester	Trafford
2	Salford	Trafford	Bury	Salford	Salford	Bolton	Manchester
3	Wigan	Rochdale	Manchester	Bury	Manchester	Salford	Stockport
4	Trafford	Stockport	Bolton	Trafford	Bury	Trafford	Bury
5	Tameside	Bury	Rochdale	Bolton	Stockport	Wigan	Bolton
6	Bury	Salford	Oldham	Stockport	Bolton	Stockport	Salford
7	Bolton	Oldham	Tameside	Rochdale	Rochdale	Tameside	Oldham
8	Rochdale	Bolton	Wigan	Oldham	Tameside	Oldham	Wigan
9	Oldham	Wigan	Stockport	Tameside	Oldham	Bury	Tameside
10	Manchester	Tameside	Trafford	Wigan	Wigan	Rochdale	Rochdale

Tameside
Greater Manchester Local Authorities

Note: Employment growth from 2013; business growth from 2014. Higher level skills are % of population with Level 4+ qualifications

Source: BRES, ONS, 2013-2018; UKBC, ONS 2014-2019; Business Demography, ONS, 2018; Annual Population Survey, ONS, 2013-2019 ; Sub regional Productivity, ONS, 2018

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Keyword analysis from Greater Manchester Emerging Technology study

This section also provides key word analyses of Tameside's opportunity sectors based on a report delivered by Hatch Regeneris in partnership with The Data City for GMCA in 2019. The study provided economic analysis of emerging technology sectors, using a machine learning approach to classify businesses based on the words they use to describe themselves on websites. The rationale of this approach is to address shortcomings in traditional SIC code-based analysis of accurately capturing companies that operate in small, frequently changing niche markets and those in emerging sectors that have not yet been classified.

Businesses were identified via web-scraping, matched to Companies House data where possible, and allocated into emerging sectors based on keywords. Approximately 32,500 businesses in emerging sectors were identified via this method in Greater Manchester, with 1,815 registered in Tameside (5.5% of GM total). The keyword composition of each sector for Tameside, identified from business websites, is included on the following slides.

Data drawn from Eventbrite and Meetup.com in 2019 was also analysed to reflect early stage innovation activity. Events were classified against themes of interest using a machine learning process. Unsurprisingly, Manchester was the principal location for such events within Greater Manchester, accounting for 84% (1,978 events) of all those detected within the region. With Salford accounting for a further 12% (271 events), the remaining boroughs account for little, with Tameside accounting for 1% (24 events). A point of significance for Tameside is that half of those 24 events were classified as Medicine related, suggesting this is a fledging area of innovation networking in the borough.

Source: Hatch Regeneris; The Data City, 2019

Focus on… Advanced Manufacturing & Materials

CURRENT OVERVIEW

JOBS (2018)

Number	3,825
% of all jobs	5%
LQ vs England	1.2
% Change (2011-16)	-10%

BUSINESSES (2019)

Number	395
% of all businesses	6%
LQ vs England	1.5
% Change (2012-17)	+1%

LOCAL SPECIALISMS

Manufacture of medical and dental instruments

600 jobs; LQ = 3.6

Engineering activities and related technical consultancy

700 jobs; LQ = 3.0

Source: UKBC and BRES, ONS (2019)

COMPETITIVE POSITION

The manufacturing sector in Tameside is large and productive and a key driver of economic growth. Advanced Manufacturing & Materials is an important sub-set of the broad manufacturing sector, driving higher value added activity. Tameside is well served by road, rail, sea and air, with excellent connections to industry primes and suppliers.

KEY ASSETS

- Digital infrastructure ('Dark' fibre)
- Proximity to R&D centres of excellence in advanced materials in GM
- Access to tailored business support programmes such as Made Smarter
- Tameside College Advanced Technology Centre & the Centre for Construction Skills
- Proximity to GM HEI offer providing graduate talent and higher level skills

TRENDS

- Industrial digitalisation and automation
- Decarbonisation & energy efficiency / Circular economy approaches
- Advanced materials & additive manufacturing
- Regulation & trade impacts
- Electrification & battery technology

OPPORTUNITIES

- Supply chain opportunities in major projects i.e. HS2, local transport investments i.e. Ashton Interchange, Mottram Bypass, Metrolink extension, new stations, major housing development at Godley Green
- Sector growth prospects in areas of UK competitive advantage i.e. aerospace, pharma & tech intensive
- Process innovation such as 3D printing, additive & composite manufacturing and rise of plastic electronics
- Low carbon agenda / environmental sustainability
- Exploitation of digital and leadership skills to drive productivity gains
- Supply chain opportunities linked to major projects and Tier 1 activity
- New markets opened up by new trade deals
- Reshoring from overseas
- Growing demand for customised products
- Increased demand for manufactured goods in cities linked to population growth and urban mobility demand

THREATS

- Impact of proposed new 'Advanced Materials City' development
- Increased automation impacting on employment demand
- Post Brexit impact on investment, trade patterns & workforce
- Increased regulation
- Overseas competition
- Availability of sites and premises to accommodate demand
- Ageing workforce
- Changing skill requirements

Composition of the Economy – Advanced Manufacturing & Engineering Competitive Position

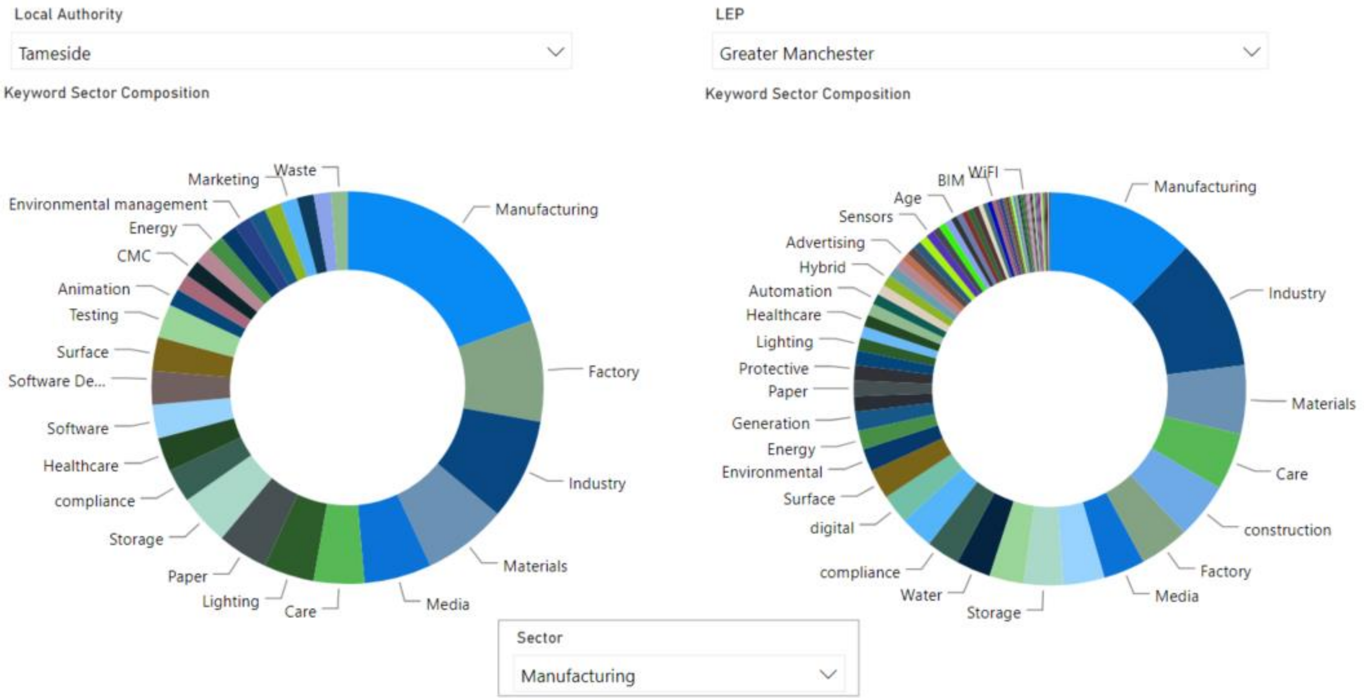
Tameside has distinct strengths in advanced manufacturing and engineering (AME) with GM. On relative measures Tameside has the highest proportion of AME employees and businesses in GM, and the highest level of concentrated activity as shown by location quotient analysis.

Competitive Position – AME Employment

Competitive Position – AME Business Base

Keyword analysis of Advanced Manufacturing & Materials

Key words such as materials and care feature in Tameside's analysis, pointing to opportunities including advanced materials and the interface between manufacturing and health. At least 607 businesses associated with Manufacturing keywords were identified in Tameside out of a GM total of 7,117 (8.5%). Given the size of Tameside's business base, this suggests manufacturing as a clear area of specialism for the metropolitan borough.



Source: Hatch Regeneris; The Data City, 2019

Focus on… Digital, Media, Creative and Tech (DMCT)

CURRENT OVERVIEW

JOBS (2018)

Number	1,895
% of all jobs	3%
LQ vs England	0.4
% Change (2011-16)	+19%

BUSINESSES (2019)

Number	1,215
% of all businesses	20%
LQ vs England	0.8
% Change (2012-17)	+13%

LOCAL SPECIALISMS

Manufacture of jewellery and related articles

400 jobs; LQ = 2

Architectural activities

10 jobs; LQ = 1.1

Source: UKBC and BRES, ONS (2019)

COMPETITIVE POSITION

Tameside's proximity to GM as a leading digital city-region, the roll-out of the dark fibre network and the quality of life offer presented by the proximity to the Pennine Moors.

KEY ASSETS

- Competitive digital infrastructure offer: 'Dark' fibre and Tier 3 Data Centre
- DMCT premises offer such as Ashton Old Baths
- Tameside Co-operative Network
- Affordable location for sites & premises
- Proximity to digital and creative clusters in GM including MediaCityUK, The Sharp Project and GM HEIs
- Proximity to GM HEI offer providing graduate talent and higher level skills; Tameside HACK

TRENDS

- Digital transformation accelerating innovation and productivity across all sectors
- Rise of online shopping and changing consumer behaviour
- Increased automation and adoption of AI technologies
- Rise of immersive technologies
- High skill / low skill occupational polarisation
- Big data
- Rise of self-employment in the sector

OPPORTUNITIES

- Leverage digital assets to maximise gigabit capable connectivity (full fibre and 5G) to residential and commercial premises
- Digital skills development i.e. new Digital Skills Partnership
- Digital business support ecosystem to support digitalisation of the business community
- Digital access to services, learning and information
- Investment in AI related R&D to boost productivity
- Transferability of DMCT skills and products to other opportunity sectors i.e. AME, Clean Growth
- Increased demand for transport and logistics as a result of rapid growth in e-commerce Growth in the visitor economy driving creative sector demand
- UK strengths in computation, software tools/design and content, data analytics and wider strengths in media will drive economic opportunity

THREATS

- Resilience of digital network to meet increased demand
- Automation impact on jobs / sectors
- Overseas competition
- Availability of sites and premises to accommodate employment growth
- Changing skill requirements including access to digital skills
- Need to attract and retain higher skilled (L4+) to facilitate innovation and competitiveness

Composition of the Economy – Digital, Media, Creative & Tech (DMCT) Competitive Position

Tameside has an emerging profile in the DMCT sector. Whilst indicators of absolute and relative employment strength are low in comparison to other local authorities in GM, it is notable that the sector has experienced rapid employment growth in the past 5 years within Tameside.

Competitive Position – DCMT Employment

Rank	Digital, Media, Creative and Tech - employment	Digital, Media, Creative and Tech - % employment	Digital, Media, Creative and Tech - LQ	Digital, Media, Creative and Tech – employment growth
1	Manchester	Salford	Salford	Manchester
2	Salford	Manchester	Manchester	Salford
3	Stockport	Stockport	Stockport	Stockport
4	Trafford	Trafford	Trafford	Tameside
5	Bolton	Rochdale	Rochdale	Bolton
6	Oldham	Oldham	Oldham	Trafford
7	Rochdale	Bolton	Bolton	Wigan
8	Wigan	Tameside	Tameside	Oldham
9	Bury	Bury	Bury	Rochdale
10	Tameside	Wigan	Wigan	Bury

Source: ONS, Business Register and Employment Survey (2019)

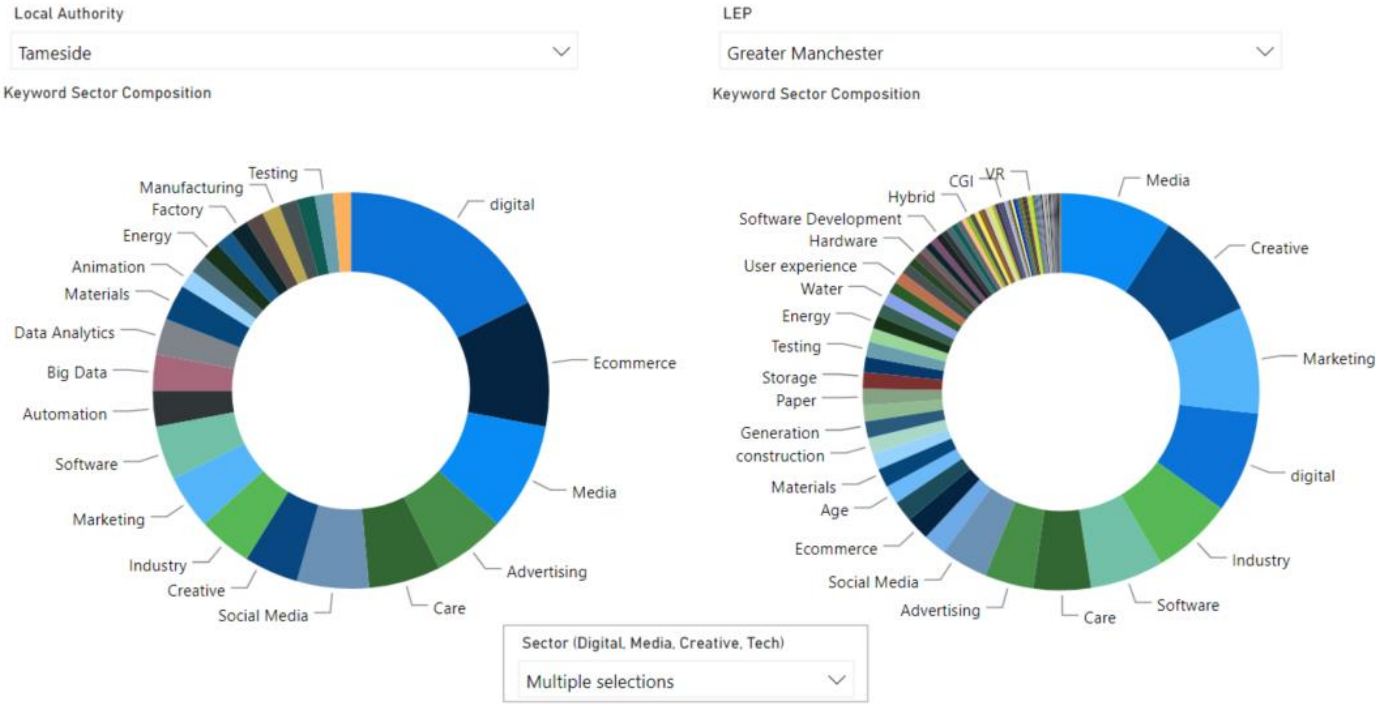
Competitive Position – DCMT Business Base

Rank	Digital, Media, Creative and Tech - business	Digital, Media, Creative and Tech - % business	Digital, Media, Creative and Tech – LQ (business)	Digital, Media, Creative and Tech – business growth
1	Manchester	Manchester	Manchester	Manchester
2	Trafford	Trafford	Trafford	Bury
3	Stockport	Stockport	Stockport	Bolton
4	Salford	Oldham	Oldham	Oldham
5	Bolton	Tameside	Tameside	Trafford
6	Wigan	Rochdale	Rochdale	Rochdale
7	Bury	Wigan	Wigan	Salford
8	Oldham	Bury	Bury	Tameside
9	Tameside	Salford	Salford	Wigan
10	Rochdale	Bolton	Bolton	Stockport

Source: ONS, UK Business Counts (2019)

Keyword analysis of Digital, Media, Creative and Tech (DMCT)

The interface between DMCT and key words such as care in Tameside indicates the digitalisation of health care as an opportunity. At least 736 businesses associated with Digital, Media, Creative and Tech keywords were identified in Tameside out of a GM total of 14,894 (4.9%). As such, the DMCT sector has a large presence in the borough, although not at a higher density than Greater Manchester overall.



Source: Hatch Regeneris; The Data City, 2019

Focus on… Health Innovation

CURRENT OVERVIEW

JOBS (2018)

Number	10,025
% of all jobs	14%
LQ vs GB	1.3
% Change (2011-16)	+22%

BUSINESSES (2019)

Number	195
% of all businesses	3%
LQ vs GB	1.1
% Change (2012-17)	+15%

LOCAL SPECIALISMS

Manufacture of pharmaceutical preparations

150 jobs; LQ = 2.4

Hospital activities

6,000 jobs; LQ = 1.7

Source: UKBC and BRES, ONS (2019)

COMPETITIVE POSITION

Tameside is home to two NHS trusts, and Tameside Hospital which is one of the Borough's largest employers. Tameside has an innovative 'Care Together' delivery model integrating the CCG with Tameside Council through a Single Commissioning Function to improve health and social care outcomes.

KEY ASSETS

- Tameside College and redevelopment plans at Beaufort Road campus for Health & Social Care
- Proximity to GM HEI offer providing STEM talent
- Proximity to GM health innovation cluster including leading research facilities, existing health innovation companies, six large teaching hospitals
- Proximity to key projects such as the Pankhurst Centre for Research in Health, Technology and Innovation

TRENDS

- Demographic change (population growth and ageing factors) driving demand
- Rise of people living with two or more health conditions
- Medical advances improving population health and care outcomes
- Financial sustainability goals driving delivery cost efficiencies and care model innovation
- Digital transformation and evolution of e-health
- Flexible work patterns (rise of part time contracts)

OPPORTUNITIES

- Devolved funding to deliver health-related investment locally
- Delivering place-based approaches and integrated services for health, employment and other services e.g. Working Well Health Pilot
- Maximise social value benefit from health care commissioning
- Health innovation including life sciences, medical technologies/devices, and e-health
- Supply chain opportunities created by a growing ageing population with diverse health care needs

THREATS

- Widening health inequalities
- Public health crisis / impact of pandemics on the future delivery of healthcare
- Ageing population pressures on future healthcare services
- Ageing workforce leading to high replacement demand
- Impact of Brexit on workforce
- Skill shortages and recruitment difficulties
- Impact of public sector austerity
- Competition with established health innovation/life science clusters elsewhere in the UK

Composition of the Economy – Health Innovation Competitive Position

Tameside has a significant health sector as demonstrated by the highest relative concentration of employment activity in the borough. However, the number of businesses in the sector is relatively low in absolute and relative terms, although the business base is growing.

Competitive Position – Health Employment

Rank	Health - employment	Health - % employment	Health - LQ	Health – employment growth
1	Manchester	Tameside	Tameside	Wigan
2	Stockport	Bury	Bury	Tameside
3	Salford	Wigan	Wigan	Salford
4	Wigan	Bolton	Bolton	Bolton
5	Bolton	Stockport	Stockport	Manchester
6	Tameside	Manchester	Manchester	Stockport
7	Bury	Oldham	Oldham	Rochdale
8	Oldham	Salford	Salford	Trafford
9	Rochdale	Rochdale	Rochdale	Bury
10	Trafford	Trafford	Trafford	Oldham

Tameside
Greater Manchester Local Authorities

Source: ONS, Business Register and Employment Survey (2019)

Competitive Position – Health Business Base

Rank	Health - businesses	Health - business %	Health – LQ (business)	Health – business growth
1	Manchester	Manchester	Trafford	Rochdale
2	Trafford	Trafford	Bolton	Trafford
3	Bolton	Bolton	Rochdale	Bolton
4	Stockport	Stockport	Stockport	Salford
5	Salford	Salford	Manchester	Manchester
6	Bury	Bury	Tameside	Tameside
7	Rochdale	Rochdale	Oldham	Bury
8	Wigan	Wigan	Bury	Stockport
9	Oldham	Oldham	Salford	Oldham
10	Tameside	Tameside	Wigan	Wigan

Tameside
Greater Manchester Local Authorities

Source: ONS, UK Business Counts (2019)

Tameside Metropolitan Borough

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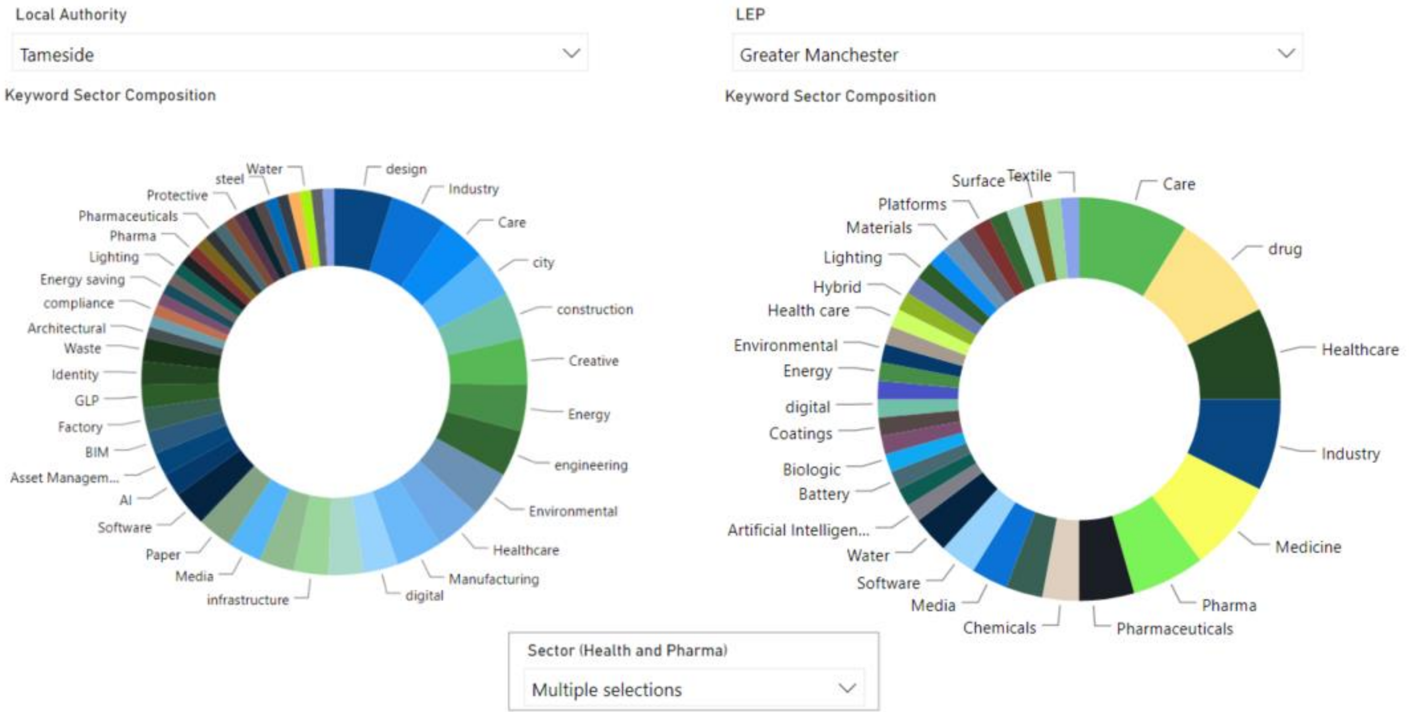
Keyword analysis of Health (and Pharmaceutical)

Key words featured in Tameside’s health care sector include engineering and manufacturing, pointing to the interface that exists between the two opportunity sectors. At least 404 businesses associated with Health and Pharmaceutical sector keywords were identified in Tameside out of a GM total of 9,044 (4.4%). Whilst this total represents a significant business base within Tameside, it is the lowest total amongst Greater Manchester local authorities.



Source: Hatch Regeneris; The Data City, 2019.

Focus on… Clean Growth

CURRENT OVERVIEW

JOBS (2018)

Number	360
% of all jobs	1%
LQ vs GB	1.1
% Change (2011-16)	+16%

BUSINESSES (2019)

Number	5
% of all businesses	0.1%
LQ vs GB	0.4
% Change (2012-17)	0%

LOCAL SPECIALISMS

Waste treatment and disposal

350 jobs; LQ = 3.6

Source: UKBC and BRES, ONS (2019)

COMPETITIVE POSITION

Through the Tameside Low Carbon Strategy the borough is actively looking at how to make best use of physical and natural resources. The borough has an active role to play in de-carbonising the local economy and maximising the contribution of the natural capital of the Pennine Moors.

KEY ASSETS

- Energy Gain UK as a Tameside employer specialising in natural energy technologies
- Proximity to GM HEI offer providing STEM talent
- Proximity to GM scientific research base and expertise around generation, storage and low carbon technologies
- Key developments and projects including housing, employment sites, Tameside Interchange, Trans-Pennine Upgrade
- GM roll out of district heating networks

TRENDS

- Energy policies, environmental legislation and climate change resilience
- Energy transition and shift to a low carbon future creating new electrical supply and consumption patterns
- Reducing heat demand of new developments
- Shift to low carbon transport requires new infrastructure

OPPORTUNITIES

- Large scale investment in UK energy and infrastructure
- Population growth and demand for accompanying infrastructure and housing including Godley Green Garden Village
- Implementation of Smart Cities agenda
- Ambitious government targets for new homes and carbon neutral living by 2038 in GM
- Long term public infrastructure projects such as HS2 and NPH rail strategy, and local transport upgrades & investment
- Growth opportunities related to low carbon heat; recovery/recycling; building technologies/retrofit; ultra-low emission vehicles; changing electrical distribution network; low carbon developments
- Investment in innovative energy technology
- Supporting industry to shift to clean growth and stimulate local supply chain development
- Government investment e.g. ‘Transforming Construction – Manufacturing Better Buildings Programme’

THREATS

- Regulatory framework impacting on decarbonisation requirements and driving business adaption
- Access to finance to fuel innovation and growth
- Willingness to adapt and embrace sustainable technologies
- Changing skill requirements and replacement demands
- Ensuring waste, processing, and energy distribution networks keeps pace with new developments
- Flood resilience

Composition of the Economy – Clean Growth Competitive Position

Tameside has an absolute and relative concentration of activity in the clean growth sector using the Standard Industrial Classification (SIC) as measured by employment, ranking third on these measures within GM. However the business base is relatively low in comparison to other areas within GM.

Competitive Position – Clean Growth

Rank	Clean growth - Employment	Clean Growth – Employment %	Clean Growth – Employment LQ	Clean Growth – Employment Growth
1	Bolton	Bolton	Bolton	Bury
2	Salford	Salford	Salford	Bolton
3	Tameside	Tameside	Tameside	Tameside
4	Manchester	Oldham	Oldham	Manchester
5	Oldham	Bury	Bury	Salford
6	Stockport	Stockport	Stockport	Oldham
7	**Bury**	**Rochdale**	Rochdale	Rochdale
8	Trafford	Manchester	**Manchester**	Wigan
9	Wigan	Wigan	Wigan	Stockport
10	Rochdale	Trafford	Trafford	Trafford

Source: ONS, Business Register and Employment Survey (2019)

Competitive Position – Clean Growth

Rank	Clean growth - Businesses	Clean Growth – Business %	Clean Growth – Businesses LQ	Clean Growth – Businesses Growth
1	Manchester	Trafford	Trafford	Rochdale
2	Trafford	Wigan	Wigan	Oldham
3	Bolton	Manchester	Manchester	Manchester
4	Salford	Oldham	Oldham	Wigan
5	Wigan	Rochdale	Rochdale	Bolton
6	Oldham	Bolton	Bolton	Salford
7	**Rochdale**	**Salford**	Salford	Trafford
8	Stockport	Stockport	**Stockport**	Stockport
9	Bury	Tameside	Tameside	Tameside
10	Tameside	Bury	Bury	Bury

Source: ONS, Business Count (2019).

Tameside Metropolitan Borough

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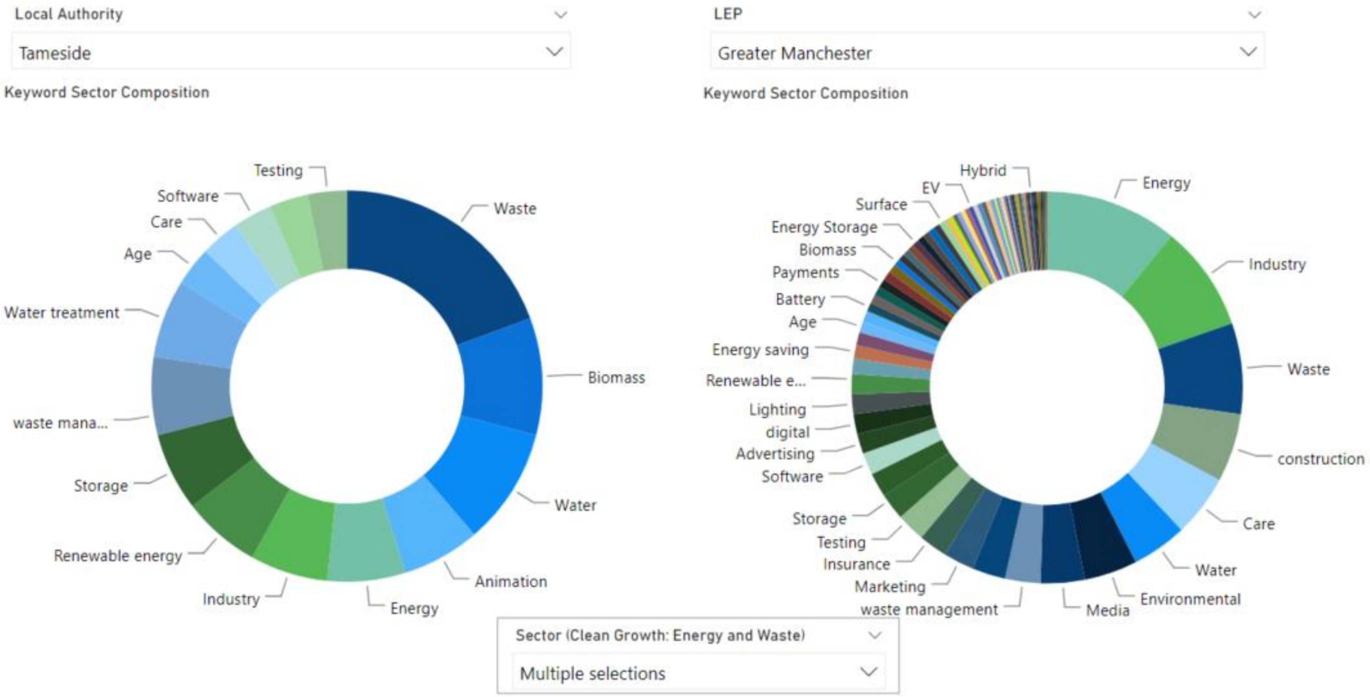
Keyword analysis of Clean Growth

The key word analysis supports understanding of what clean growth means in a Tameside context, with activity in waster, biomass, water, energy and renewable energy featuring. At least 99 businesses associated with Clean Growth, Energy, and Waste sector keywords were identified in Tameside out of a GM total of 1,597 (6.2%). Tameside has a relatively low number of clean growth businesses compared to other Greater Manchester's local authorities.



Source: Hatch Regeneris; The Data City, 2019.

Business, Enterprise, Trade and Investment – Business Size

Tameside is home to a diverse range of businesses, with a mix of business sizes, activities and performances.

Around 6,140 businesses are located in Tameside, and the business base has grown by 6% since 2015.

A large proportion (89%) of Tameside's businesses are micro in size, employing less than 10 people.

At the other end of the spectrum there are around 15 businesses employing more than 250 people in Tameside (slightly below the average for the wider GM City region).

Size of Businesses, 2019

Business Size	Tameside		GMCA	England
	No.	%	%	%
Micro (0-9)	5,455	88.8%	88.9%	89.6%
Small (10-49)	580	9.4%	9%	8.5%
Medium (50-249)	90	1.5%	1.6%	1.5%
Large (250+)	15	0.2%	0.4%	0.4%

Source: ONS UK Business Count - Enterprises, 2

Business, Enterprise, Trade and Investment – Enterprise

Tameside has a relatively supressed enterprising economy. In 2018, there were only 6.1 business births per 1,000 working age population (WAP) compared to 12 in GM as a whole. Taking business deaths into account, this translates into a net business birth rate of 0.8 per 1,000 working age population.

Self-employment levels and home-working are also below the GM and England average.

Survival rates are slightly higher than the GM average: around 60% of businesses starting in 2013 survived for 3 years relative to 59% in GM.

‘High growth’ enterprises are defined as having average annualised growth greater than 20% per annum over a three year period by the Office for National Statistics. Tameside has 35 ‘high growth’ businesses, accounting for a 6% share of the 600 high growth businesses in GM. Tameside has an increasing number of high growth businesses, up by 15 (+75%) since 2015.

Enterprise Levels

	Tameside		GM	England
	No.	Rate	Rate	Rate
Business Births per 1,000 WAP	860	6.1	12.0	9.7
Business Deaths per 1,000 WAP	750	5.3	11.2	8.5
Net business birth rate (births – deaths per 1,000 WAP)	+110	0.8	0.8	1.2
Business survival rates, 2013 births (3 years)	59.5%		58.2%	60.9%
Self-Employment		12.3%	13.7%	15.5%
Home working		7.6%	8.1%	10.4%

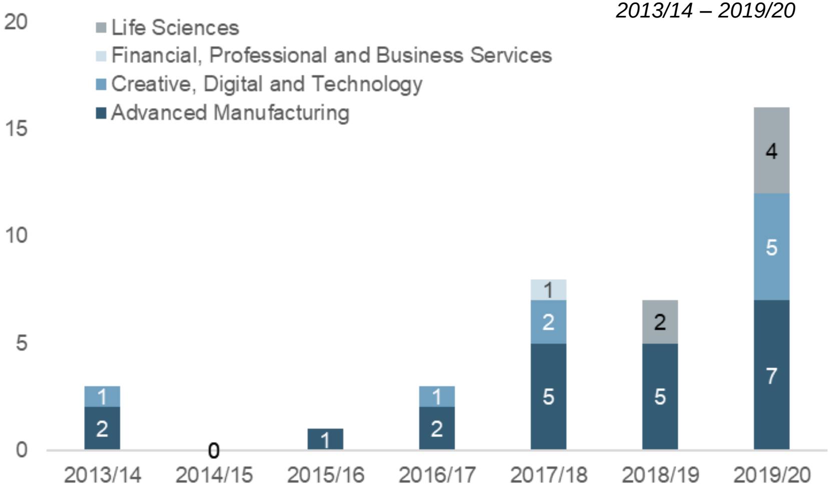
Source: ONS Business Demography, 2018; APS, 2019; ONS Census, 2011

Business, Enterprise, Trade and Investment – Investment

Tameside's share of inward investment enquiries within Greater Manchester is disproportionately small given the size of the borough's economy. Whilst Tameside GVA accounts for over 4% of the GM total, the borough had only 1.4% of total inward investment enquiries in GM between 2013 and 2020.

The majority of these enquiries (22 in total) were in Advanced Manufacturing – accounting for 8% of total GM enquiries. Creative, Digital and Technology had the second most with 9 enquiries. (0.3% of GM). Behind Life Sciences (6 enquiries, 0.2% of GM), Financial, Professional and Business Services only saw 1 enquiry during 2013-20 in Tameside.

Tameside investment enquiries by sector 2013/14 – 2019/20



Share of inward investment enquiries in GM, 2013-20

Data source: MIDAS

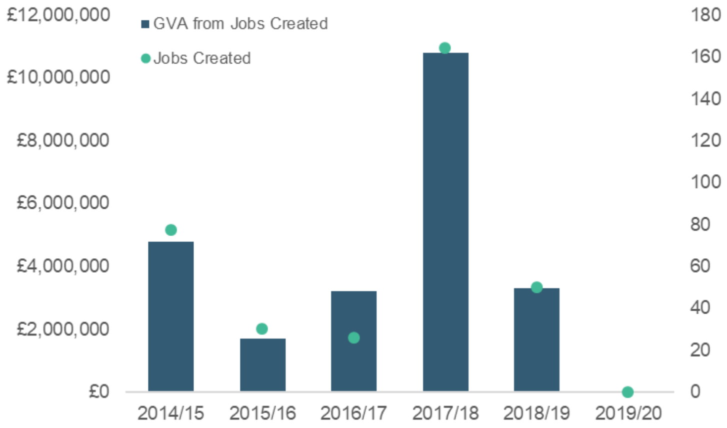
Business, Enterprise, Trade and Investment – Investment

Investment data collected within Greater Manchester by MIDAS over the period from 2013 up to 2020 reveals that Tameside has secured 13 investments over time, 2.5% of the GM total. Tameside was most successful in securing advanced manufacturing and life science projects.

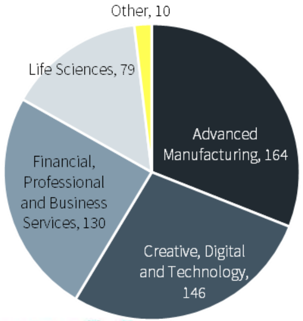
A total of 347 additional jobs resulted from these 13 investment projects within Tameside. These jobs contributed £23.8m additional GVA associated with jobs created from direct inward investment in Tameside. This is slightly below nearby Oldham (£25 million) and Stockport (£36.4 million).

The number of investment successes secured in GM fell to their lowest level in 2019/20, and Tameside did not secure any projects in this time period.

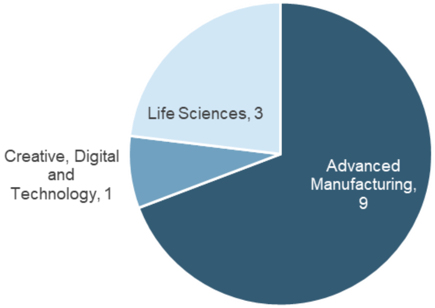
Additional GVA and Employment impact of inward investment in Tameside



Greater Manchester investment projects by sector 2013/14 – 2019/20



Tameside investment projects by sector 2013/14 – 2019/20



Data source: MIDAS

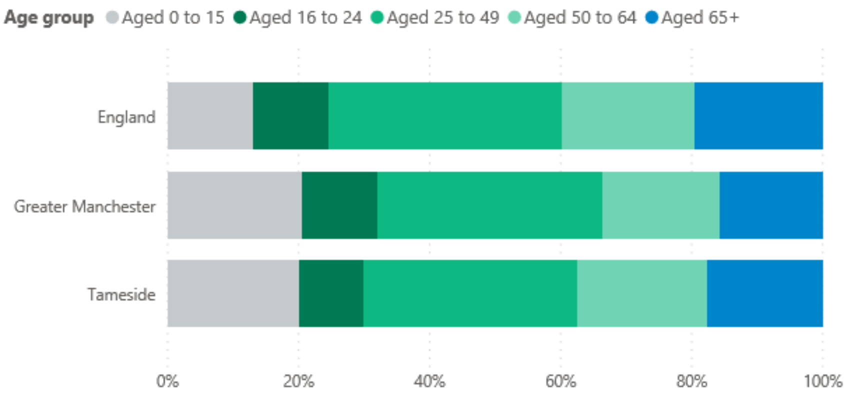
Labour Market

Labour Market - Demographics

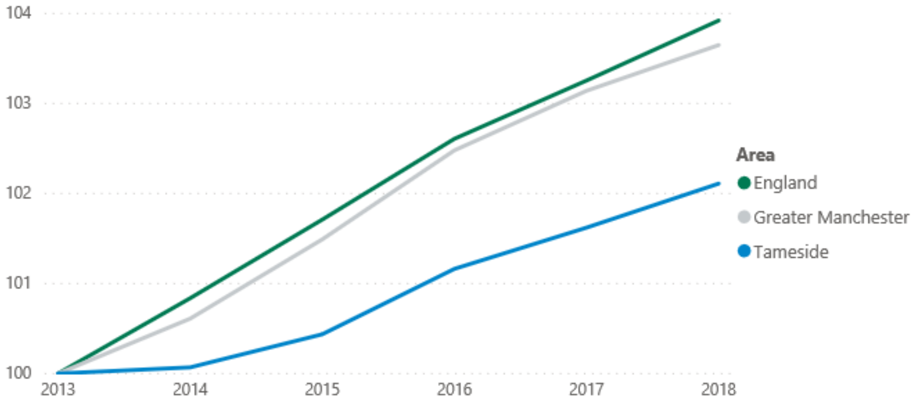
Tameside is home to 225,200 people, accounting for 8% of the population in Greater Manchester. The population has grown steadily over time (+2% since 2013) although this lags the GM and national rates of growth.

Tameside is characterised by a young population, with 20% of the population aged 0-15 years of age, relative to 13% in England. The Borough also has an above average retired population relative to GM, with 17.6% aged 65+. This highlights an above average dependent population within Tameside, and a correspondingly below average working age population (62% relative to 64% in Greater Manchester and 63% in England).

Population Age Structure, 2018



Population Growth (2013 = 100)



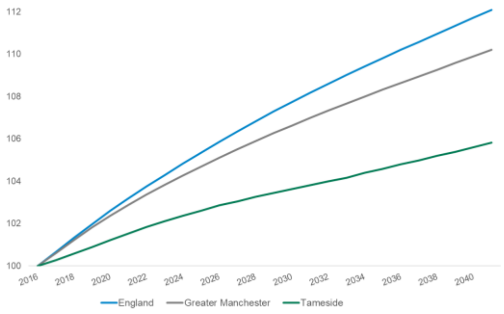
Source: Population Estimates, ONS, 2018

Labour Market - Demographics

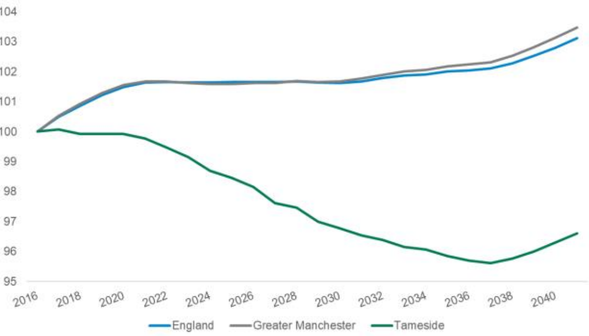
By 2041, Tameside's population is expected to reach 236,100 people, which represents a 6% growth from its 2016 level. This is markedly lower than the population growth projected for both Greater Manchester (10%) and England (12%) during that timeframe.

The over 65 age group is driving population growth throughout this period across all three geographies of analysis. Although Tameside's ageing population will grow slightly faster than that of Greater Manchester, it is comparatively slower compared to rest of England. Tameside's slower population growth can be largely attributed to a steady decline of working age individuals aged 20-64. In 2041, this age group is expected to contract by about 3% in Tameside which represents a decline of 4,000 in real terms. In contrast, this age group is expected to grow by approximately 3% in England and Greater Manchester.

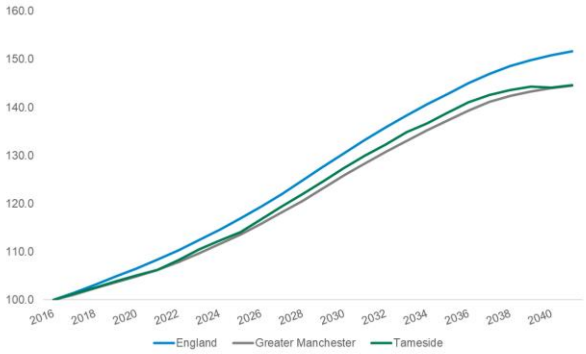
Population Growth Projections (2016 = 100)



Projected Growth of Population Aged 20-64 (2016=100)



Projected Growth of Population Aged 65+ (2016=100)



Source: Population Projections, ONS, 2018

Tameside Metropolitan Borough

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Labour Market – Activity

Tameside has comparatively good rates of economic activity, employment and unemployment rates relative to the GM average, although on all indicators the borough lags the national average. The DWP ‘Alternative Claimant Count’ identifies 5,595 claimants in Tameside in November 2019, taking into account changes to unemployment benefit and the roll-out of Universal Credit.

The number of jobs in Tameside per resident aged 16-64 is 0.57. This rate is notably low compared to the GM average of 0.85 jobs per resident aged 16-64 and is the lowest rate of all the GM boroughs, followed by Wigan (0.63) and Rochdale (0.65). This provides a measure of local labour demand, and highlights the importance of ensuring access to employment opportunities in the wider city region. Transport has an important role to play in this.

Tameside 18-24 year olds are less likely to be in Full Time Education, accounting for only 23% relative to 39% in GM and 33% in England.

Labour Market Participation, 2019

	Tameside		GM	England
	No.	%	%	%
Economic Activity Rate (16-64)	109,500	78.0%	76.3%	79.1%
Employment Rate (16-64)	104,700	74.5%	72.6%	75.9%
Unemployment Rate (16-64)	4,800	4.4%	4.9%	4.0%
18-24 Year Olds in Full Time Education	3,400	23.3%	38.8%	32.6%
Job Density	80,000*	0.57	0.85	0.87

Source: Annual Population Survey, 2019; ONS Job Density (2018)
**Total jobs includes employees, self-employed, government supported trainees and HM Forces; DWP Alternative Claimant Count (November 2019)*

Labour Market – Nature of Work

Part-time work accounts for 33% of employment in Tameside, slightly higher than the GM average of 31%. Part-time work is a dominant feature in sectors such as hospitality, leisure and recreation (64%), retail (55%), and business support services (41%). The prevalence of part-time work is stronger in these sectors within Tameside than comparator geographies.

Overall, 4.2% of Tameside workers are employed in non-permanent positions, which is on par with the GM average.

Proportion of Workers in Non-Permanent Employment, 2019

	Tameside		GM	England
	No.	%	%	%
Non-Permanent Work	4,500	4.2%	4.1%	4.4%

Source: Annual Population Survey, 2019

Part Time Work by Sector, 2019

	Tameside		GM	England
	No.*	%	%	%
Agriculture and Mining	20	29%	15%	19%
Business Support Services	1,350	41%	34%	37%
Construction	530	17%	17%	16%
Creative	110	32%	22%	21%
Financial and Professional Services	1,020	24%	18%	20%
Hospitality, Leisure and Recreation	3,600	64%	59%	56%
ICT & Digital	140	16%	11%	14%
Manufacturing	960	8%	8%	8%
Other Services	370	30%	26%	32%
Public Admin, Education, Health	8,290	39%	37%	41%
Retail	5,550	55%	51%	51%
Transport	280	17%	18%	16%
Utilities and waste	170	12%	6%	8%
Warehousing and Logistics	120	21%	22%	16%
Wholesale	610	14%	17%	15%
Total	23,090	**33%**	**31%**	**32%**

Source: BRES, ONS, 2018

*Figures are rounded to the nearest 10.

Tameside Metropolitan Borough

HATCH REGENERIS

Labour Market – Commuting and Migration

There are 45,800 Tameside residents commuting out of the borough to access employment, which is offset by 23,600 workers commuting into the borough to access employment, creating a net outflow of -22,200. The strongest outward commuter flows are towards Manchester (17,480 commuting residents from Tameside) and Stockport (8,520 commuting residents from Tameside).

The self-containment rate (i.e. those residents who live and work in Tameside) is relatively low at 47%.

The strongest inward commuting flows into Tameside are from Oldham (+4,610) and Stockport (+4,390).

Top 10 home locations for Tameside workers, 2011

Location	No. of In-commuters*
Oldham	4,610
Stockport	4,390
Manchester	3,730
High Peak	2,740
Rochdale	1,040
Trafford	990
Bury	820
Salford	750
Cheshire East	610
Bolton	460

Source: Census, ONS, 2011

Top 10 work locations for Tameside residents, 2011

Location	No. of Out-commuters*
Manchester	17,480
Stockport	8,520
Oldham	4,870
Trafford	3,000
Salford	2,580
High Peak	1,290
Cheshire East	1,130
Rochdale	1,030
Bury	570
Warrington	490

*Figures are rounded to the nearest tenth.

Commuting patterns within Tameside, 2011

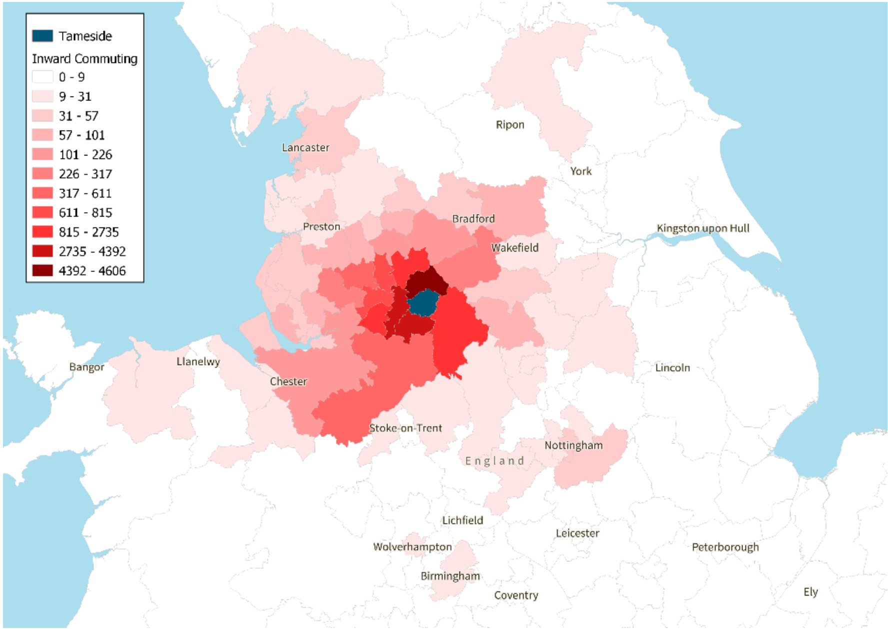
	Tameside*
Total living in Tameside (in employment)	87,100
Total working in Tameside	64,900
Commuting Patterns	
Out-commute	45,800
In-commute	23,600
Net flow	-22,200
Tameside's Workers & Residents	
Live and work in Tameside	41,300
Home workers	7,700

Source: Census, ONS, 2011

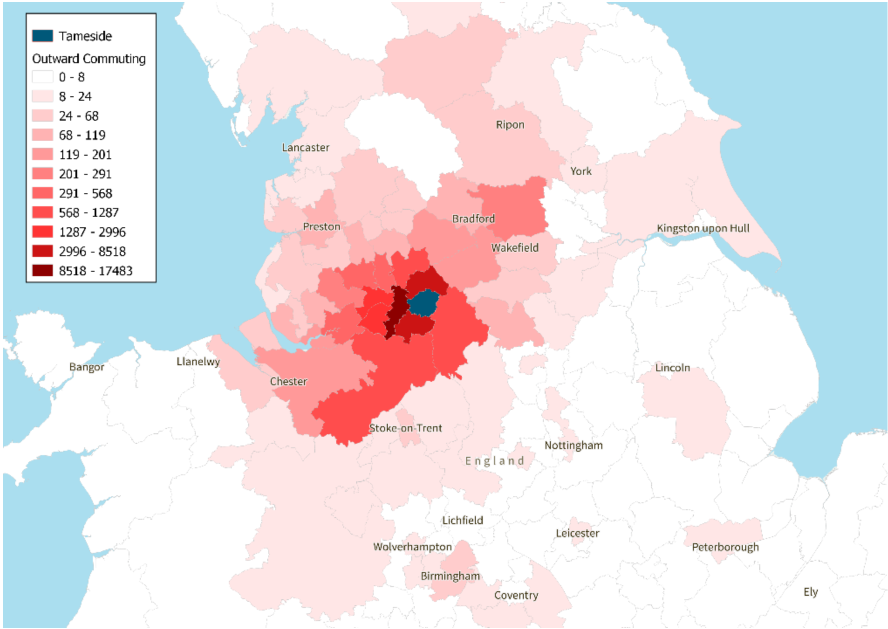
*Figures are rounded to the nearest hundred.

Labour Market – Commuting and Migration

A) - Where people come from to work in Tameside borough, 2011



B) - Where Tameside residents go to work outside the borough, 2011



Data source: Census, ONS, 2011

NB: larger scale version of B) included in Appendix B

*Figures are rounded to the nearest hundred.

Labour Market – Commuting and Migration

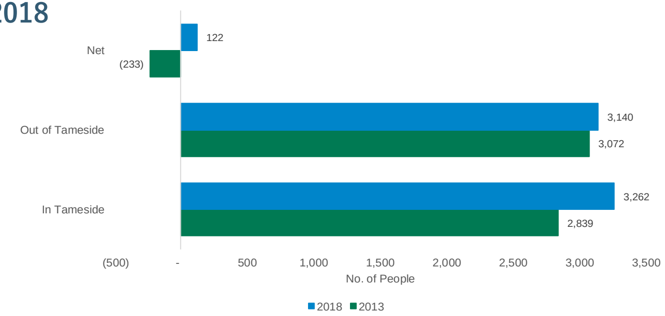
Migration trends are contributing to population growth within Tameside.

Internal migration in-flows have been relatively constant over time, with a steady increase since 2015. Since 2015 the proportion of migrants leaving Tameside has been lower than those coming into Tameside, contributing to a net gain.

International migration in-flows peaked in 2016 before declining in 2017. International migration out-flows are substantially lower, contributing to a net gain.

There is an increasing trend of young people moving into Tameside, from a position of net decline in 2013 to net gain in this cohort in 2018.

Internal Migration of Young People (aged 24 and below) in 2013 and 2018

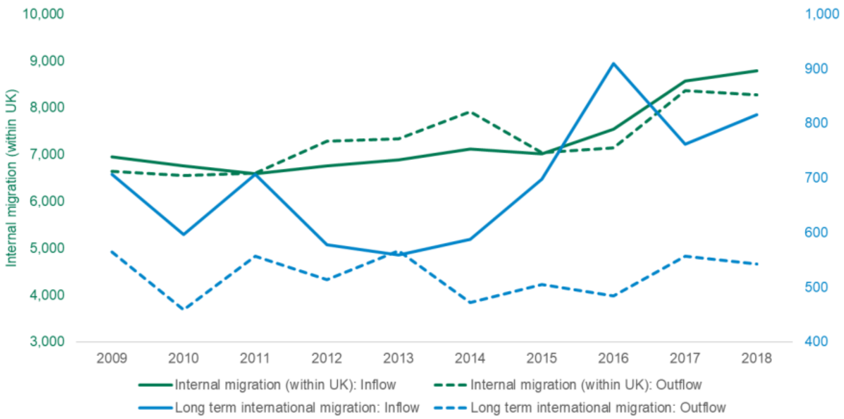


Internal & Long-term International Migration to/from Tameside, 2017-2018

	Inflow	Outflow	Net Inflow
Internal Migration	8,800	8,300	500
Long-term International Migration	820	540	280

*Figures are rounded.

Internal & Long-term International Migration to/from Tameside



Source: ONS Local Area Migration Indicators, 2009-2018

Tameside Metropolitan Borough

HATCH REGENERIS

Labour Market – Occupations

Approximately 39% of Tameside residents are occupied in higher level occupations. This is six percentage points lower than the GM average (45%) and nine percentage points below the England average (48%).

Significant gains in the proportion of residents occupied in higher level professions has occurred over time. Overall, there are 24% more residents in Tameside occupied in higher level occupations in 2019 than there were in 2014.

However, the same pace of change has not occurred within Tameside workers, where there has been only an 8% growth in the number of workers occupied in higher level occupations. The number of workers occupied in lower and intermediate level occupations such as sales and customer service, process, plant and machine operatives, and administrative and secretarial occupations has experienced significant growth however.

Occupations of Tameside's Residents & Workers, 2014-9

Occupation	Tameside's Residents		Tameside's Workers	
	No. (2019)	Change (2014-19)	No. (2019)	Change (2014-9)
Managers, directors and senior officials	9,500	40%	5,700	0%
Professional occupations	16,200	11%	9,900	-8%
Associate prof & tech occupations	16,500	31%	8,400	45%
Higher Level Occupations	*42,200*	*24%*	*24,000*	*8%*
Administrative and secretarial occupations	10,900	-3%	6,200	22%
Skilled trades occupations	14,400	4%	8,700	-8%
Caring, leisure and other service occupations	8,500	-25%	6,100	-29%
Sales and customer service occupations	10,800	17%	6,200	32%
Process, plant and machine operatives	8,700	47%	4,000	18%
Elementary occupations	11,700	-3%	9,700	4%

Source: Annual Population Survey, ONS, 2019

Tameside Metropolitan Borough

HATCH REGENERIS

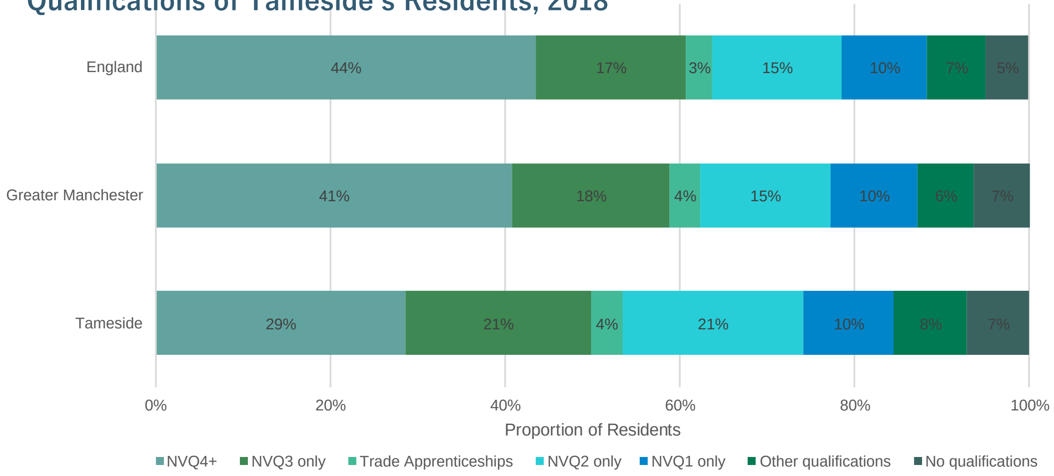
Labour Market – Qualifications

Tameside has a significant under-representation of residents holding higher level (L4+) skills at 29% relative to 41% in GM and 44% in England. There has been a very slight gain of 1 percentage point from the position 5 years previously (2013). In contrast, rapid gains have been made in GM (+4 percentage points) and England (+4 percentage points) in residents holding L4+ qualifications.

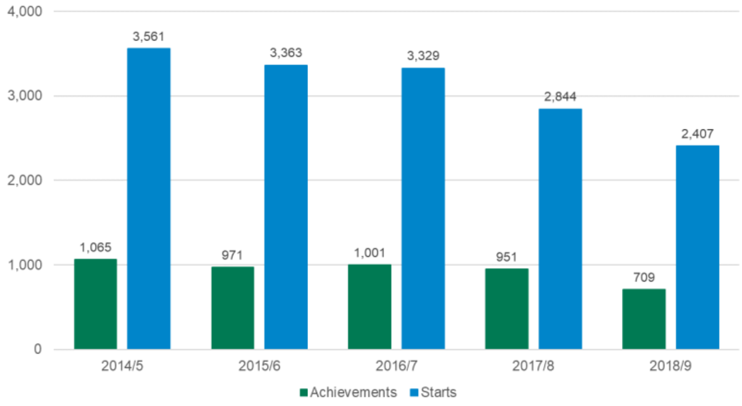
Tameside has an above average proportion of residents holding no qualifications, at 7%, which is on par with the GM average and two percentage points above the England position.

Apprenticeship starts and achievement rates were largely constant in Tameside until 2017, when the Apprenticeship Levy was introduced. Of the 2018/19 achievements, 52% were intermediate, 43% were advanced, and 4% were higher apprenticeships.

Qualifications of Tameside's Residents, 2018



Apprenticeship Starts & Achievements in Tameside



Source: Annual Population Survey, ONS, 2019

Source: Apprenticeship Participation, DoE, 2019; Apprenticeship Achievements, DoE, 2019

Labour Market – Competitive Position

Tameside exhibits challenging labour market conditions, including:

- The lowest number of jobs per resident aged 16-64 within GM
- The lowest proportion of residents holding higher level qualifications as measured by NVQ L4+
- A relatively low proportion of residents working in higher level professions (ranking 7 out of the 10 authorities on this measure)
- A relatively high proportion of residents holding no qualifications at 7.2% (ranking 6th out of 10 on this measure)

These indicators highlight the case for intervention to ensure that Tameside is responsive to future skill demand and increases skill levels in order to drive productivity and wage growth.

Rank	% with No Qualifications*	Job Density*	% with NVQ4+ Qualifications*	% in Higher Level Professions
1	Trafford 2.6%	Manchester 1.17	Trafford 55.8%	Trafford 19.7%
2	Stockport 3.0%	Trafford 1.15	Manchester 50.2%	Stockport 17.5%
3	Bury 4.4%	Stockport 0.88	Stockport 45.7%	Bury 16.5%
4	Wigan 6.4%	Salford 0.87	Bury 44.6%	Manchester 16.0%
5	Salford 7.1%	Bolton 0.75	Bolton 38.4%	Bolton 14.2%
6	Tameside 7.2%	Bury 0.73	Salford 35.5%	Salford 13.8%
7	Rochdale 7.9%	Oldham 0.68	Oldham 34.0%	Tameside 13.1%
8	Oldham 7.9%	Rochdale 0.55	Wigan 33.2%	Rochdale 13.0%
9	Bolton 7.9%	Wigan 0.63	Rochdale 29.0%	Oldham 12.6%
10	Manchester 8.4%	Tameside 0.57	Tameside 28.6%	Wigan 12.6%

Tameside   Greater Manchester Local Authorities

Note: Latest available data are for 2018.

Source: Annual Population Survey, ONS, 2019; Job Density, ONS, 2019

Infrastructure & Environment

Commercial Space: Key Office Data

Indicator	2019 Data
Total Floorspace	1.2 million sq ft 110,000 sq m
Vacancy Rate	2.2%
Leased (2016-19)	47,000 sq ft (4,300 sq m) Annual average 11,700 sq ft (1,070 sq m)
Average rental value	£10 per sq ft
Highest rental values	Small number of asking rents at £16, £21 and £26 per sq ft
Completions 2016-19	1,800 sq ft, one development

- Very low levels of recent development activity, with Tameside Council building the largest new development
- Other recent completions include refit of Ashton Old Baths
- Small volume of leasing activity, with largest deal 10,000 sq ft (2018) for Vinci Construction (Denton)
- Vacancy rate of 2.2%, but may reflect limited quantity of good quality office premises as well as strength of demand
- Average rental values appear static at c. £10 per sq ft. There are an isolated number of higher value rents

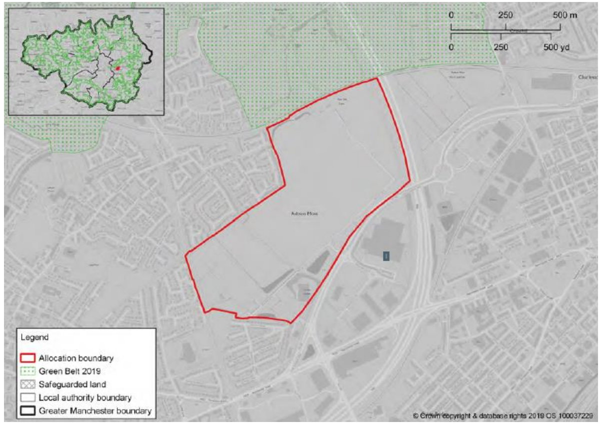
Industrial: Key Industrial Data

Indicator	2019 Data
Total Floorspace	12.5 million sq ft 1.1 million sq m
Vacancy Rate	0.8%
Leased (2016-19)	900,000 sq ft (82,500 sq m) Annual average 224,000 sq ft (20,600 sq m)
Average rental value	£4 per sq ft
Highest values	£7-7.50 per sq ft; small number exceed £8 per sq ft
Completions (2016-19)	60,000 sq ft (2018)

+ Some recorded completed development activity, although appears to be mainly a mix of small units, extensions and conversions
+ Some large scale leasings including 190k sq ft (Turner Bianca, Dukinfield), 90k sq ft (Bellfield Furnishings, Ashton), 42k sq ft (Enterprise Foods, Audenshaw)
+ Larger scale completions of space include Louvolite extension, (Ashton Road), new units at Broadway 67, and new units at Berkeley Business Park
+ Vacancy rate low at 0.8% and reflects sustained demand in the market, particularly for smaller industrial units
+ Low average rental value at £4 per sq ft but numerous deals achieving £6-7 per sq ft, and approaching values to support speculative development

Employment Opportunity Site: Ashton Moss West

One of three strategic sites provisionally allocated in the draft GMSF, Ashton Moss West is a large earmarked for office, industrial and warehousing development. It is Tameside's largest employment opportunity site, and the GMSF identifies capacity to deliver up to 175,000 sqm (1.9m sq ft) of employment space. The site is adjacent to the well established Ashton Moss retail, leisure, commercial and industrial area. It would be subject to a comprehensive masterplanning process.



Opportunities and Challenges

Ashton Moss West has excellent road connectivity to the M60 and A635 and the Metrolink network, and is only 6 miles from Manchester City Centre. The site is accessible to a substantial workforce from Tameside and the wider Greater Manchester labour market, and is located next to areas of relatively high levels of deprivation and higher than average unemployment.

The site's green belt designation and the costs of remediating a contaminated site remain the key barriers to its allocation and development. There is demand from logistics and distribution developers, reflecting the site's position in GM and its access to the M60. The challenge is to secure development and occupiers which deliver higher quality and better paid employment opportunities on the site, and to deliver the training to enable Tameside residents to secure jobs there.

Key Data

Location	North West of M60 J.23; north of A6140
Size	48.6ha
Sector Focus	Life sciences; health technologies, advanced manufacturing, materials science/fabrication, construction

Employment Opportunity Site: St. Petersfield

Now established as Tameside's urban business quarter, the St. Petersfield development has delivered modern, high quality office space to the west of Ashton Town Centre. Completed developments accommodate organisations including an Enterprise Centre and NHS facilities. The area is located adjacent to Ashton Old Baths and is targeted as a hub for digital and creative businesses.

Opportunities and Challenges

St. Petersfield has a further seven development plots available, capable of delivering up to 30,000 sq m of additional office space. The area is located on the Tameside broadband fibre loop and benefits from high capacity broadband provision. It is located in an area that is already seeing small business formation in the digital sector positioning St. Petersfield as the future focus for an emerging digital quarter in the town. The significant presence of health services, including data centre functions, coupled with high capacity broadband provision, gives St. Petersfield may offer potential for innovation in health service provision and data use.

Ashton has not yet established a profile as a strong location for office-based and digital business, and it faces stiff competition from locations across Greater Manchester. Rental values are well below levels that support speculative development, requiring public sector intervention to facilitate development.

Key Data

Location	Ashton Town Centre
Size	Up to 30,000 sq m when fully completed
Sector Focus	Professional services; knowledge-based sectors

Other Employment Site Opportunities

Other employment site opportunities in Tameside include:

+ **Hattersley:** New development by RSK bringing Envirolab to site will establish science and technology focus for site. There may be potential to build on this.

+ **Former Total site Stalybridge:** A large gateway site to Stalybridge and decontamination already complete. The key will be to secure employment development (eg. light industrial) in face of pressure for other industrial uses (waste, storage)

There are opportunities for employment and wider economic and social well-being benefits to be generated in and around Tameside's **town centres** and on **regeneration sites** elsewhere in the borough. Targets include the retail and leisure sector, but more generally businesses that will deliver employment opportunities in the town centres:

+ Town centre challenge initiative is underway for Stalybridge with a Draft Strategy presented to Tameside Council in February 2020. This identifies priorities including new and temporary workspaces to attract businesses, a revitalised retail core, an expanded events programme and facilities to attract digital and creative businesses.

+ The Hyde One Public Estate (OPE) Futures Challenge provides opportunity, community led, for fresh ideas about regeneration of the town centre.

+ There are opportunities to bring employment to residential developments in and around Droyslden, including the marina development, and the site of the former Robertsons jam factory.

+ The recently opened Wellness Centre in Denton provides a major new facility for sports and leisure activities. It is located on the edge of the western edge of a key regeneration site (Oldham Batteries). Development of the site, including the Wellness Centre, will benefit both Crown Point North Retail Park and Denton town centre.

+ Mossley's attractive Pennine fringe setting, the potential for regeneration of its mill buildings and examples of their creative re-use as workspaces point to opportunities for the town to replicate some of the success of Hebden Bridge.

Housing

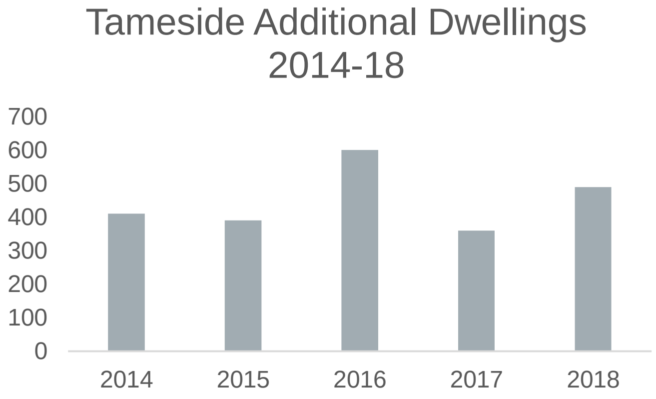
Housing Stock

Tameside had a stock of 102,350 dwellings in 2019, an increase of 2.2% from 2013. This compares with an increase of 2.7% across Greater Manchester over the same period, and 8.7% in England.

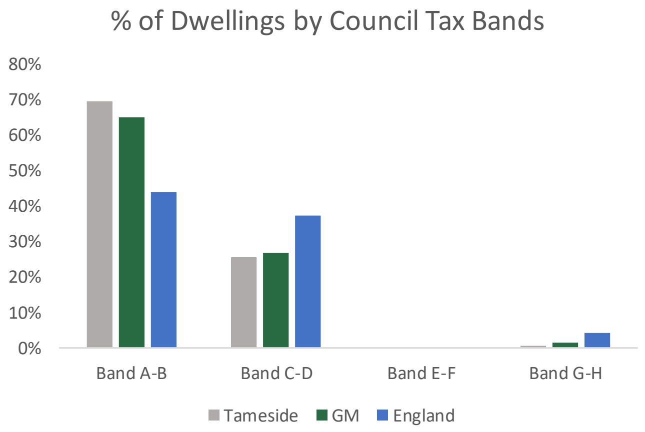
Tameside has a similar proportion of private market dwellings at 78% to that of GM (79%), which is slightly lower than the England average of 83%. 22% of dwellings in the borough are owned by Registered Providers compared with 16% in GM and 11% in England. This reflects the stock transfer process with the borough having no local authority owned dwellings.

The borough's housing stock is skewed towards smaller and lower value properties. This is reflected in Council Tax data, which shows that 69% of its stock is in Bands A-B compared with 65% in GM and only 44% nationally. Only 5% of the stock is in higher value Bands E-F and the borough has a negligible number (42 properties) in Bands G-H.

This is a challenge for the borough in terms of revenue potential through Council Tax receipts and reflects a housing market in which Tameside is not established as a location of preference for higher earning households in Greater Manchester.



Source: MHCLG Dwelling Stock Live Tables



Source: MHCLG Council Tax Base

Housing

Housing Market

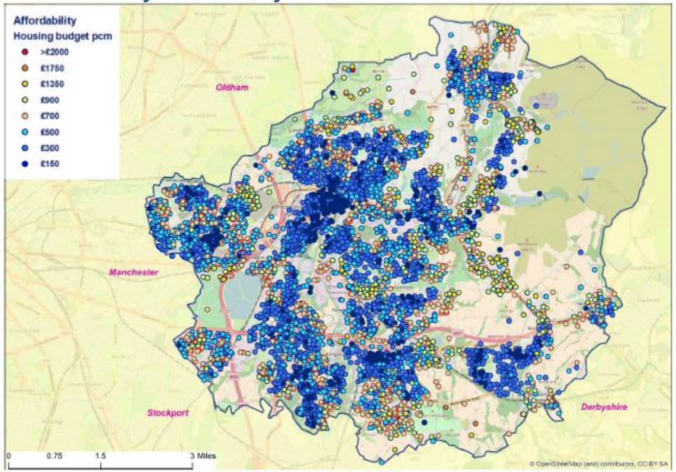
The picture presented in the Council Tax data is underlined by analysis of housing budgets for the borough's residents. Survey data for the Council's Housing Need Assessment show monthly budgets for housing predominantly in the £150-300 pcm range.

By contrast, data on the distribution of housing budgets for higher earning households shows a sparse distribution in the borough, concentrated in a small number of locations on the fringes of the borough.

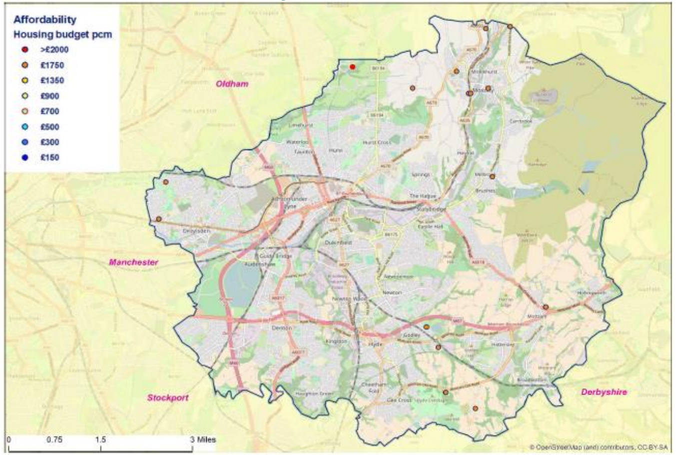
Sales transactions for Tameside since 2016 shows that there have been only 280 sales of properties over £350,000. This compares with 420 in Oldham, 700 in High Peak and 2,900 in Stockport.

The housing market data point to the need to broaden the borough's housing stock, and to encourage the development of higher value housing as part of housing growth strategy. In a borough where there is substantial greenbelt provision, particularly on its attractive rural/semi-rural fringes, this is a significant challenge.

The Summary Affordability Distribution



The over £1,350 Affordability Distribution



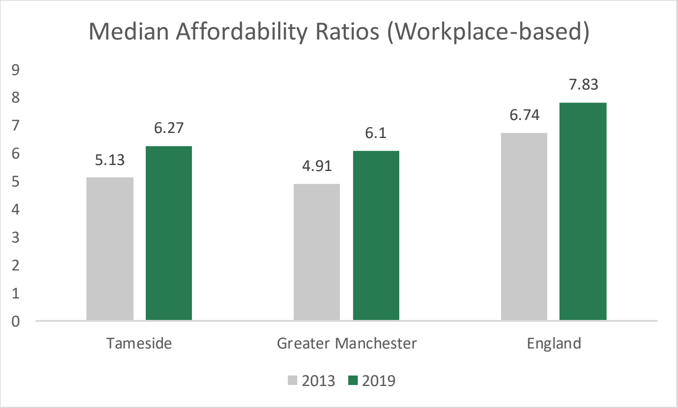
Source: Valuation Office Agency, Private Rental Market Statistics

Housing

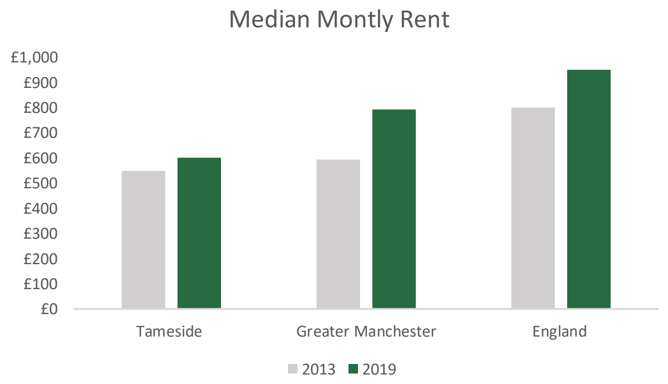
Affordability

Tameside remains a comparatively affordable housing market, although prices have risen over past decade:

+ Median house price £147,500 in 2019 and £115,000 lower quartile. Borough ranks 5th of 10 GM boroughs on this measure (workplace based).
+ Affordability ratios (median 6.27, lower quartile 5.97) have worsened since 2013 but the borough is still substantially more affordable than national average at 7.83.
+ Monthly private rents have risen more slowly in Tameside compared with Greater Manchester. Median private rent of £600 in 2019 is substantially lower than the figure for GM (£795) and England £950.



Source: ONS Housing Affordability, 2019



Source: Valuation Office Agency, Private Rental Market Statistics

Housing

Future Need and Supply

The emerging Greater Manchester Spatial Framework (GMSF) identifies a need for Tameside to deliver 8,850 homes (466 a year) between 2018 and 2037.

However, Tameside Council's latest housing need assessment (2017) points to the need for 421 affordable dwellings a year. This is a key challenge for Tameside. Whilst the two figures (466 pa and 421 pa) cannot simply be added together as an overall need figure, the high level of affordable need signals sustained demand for social rented and intermediate property in the borough.

Tameside Housing Land Supply 2018-37

Remaining units on sites under construction	Sites with consent but not started	SHLAA sites	Windfall allowance	Total 2018-37
1,059	1,503	4,576	798	7,936

Source: Greater Manchester Combined Authority, Housing Topic Paper 2019

Housing land supply data show capacity for Tameside to deliver a total of 7,936 dwellings between 2018-37. This suggests that Tameside has slightly less development land than the emerging GMSF indicates will be required.

Tameside's latest SHLAA highlights several challenges for the borough to address in delivering housing land:

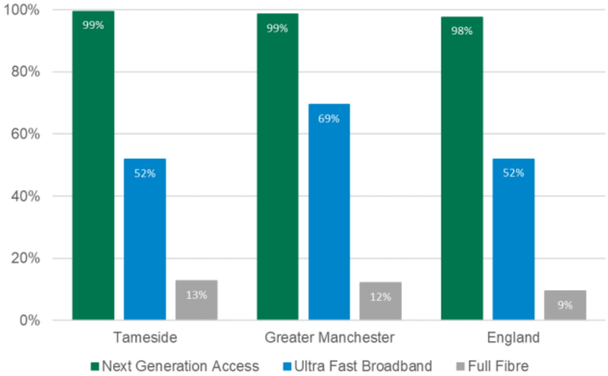
- The limited number of larger sites with only 12 sites of more than 4 hectare with capacity to deliver 2,311 dwellings
- A supply of predominantly smaller sites where the Council recognises there is a greater risk that those sites will not deliver
- The presence of several larger brownfield sites where development has stalled

The largest residential site identified in the emerging GMSF is Godley Green Garden Village, with an indicative allocation for 2,350 homes. This site is located in the green belt and will require a very special circumstances case to secure its release.

Digital Infrastructure

Tameside has a strong broadband availability offer, with 99.4% of premises connected to next generation access. According to Ofcom, 52% of premises in Tameside are connected to ultrafast broadband and 13% are connected to full fibre. An alternative measure by Think Broadband ranks Tameside highly at 6th best connected in the country on connectivity to full fibre.

Digital Connectivity

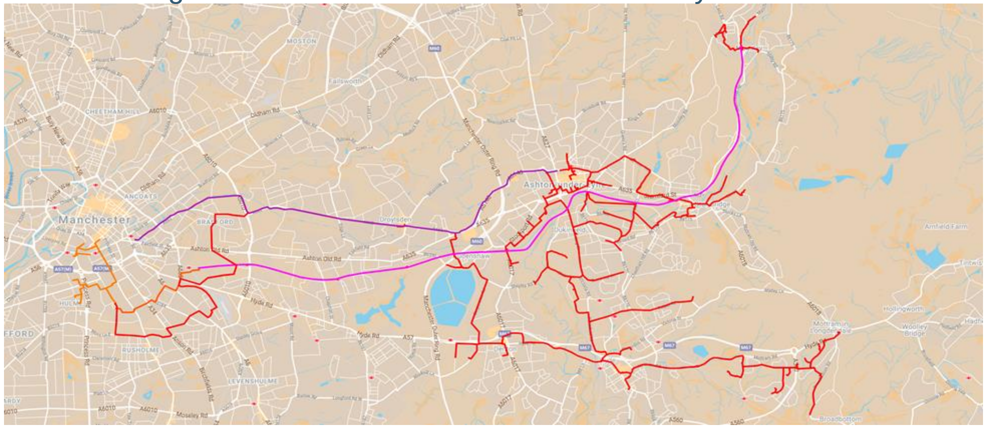


Availability of 4G Services, geographic (outdoors)

Case Study: Cooperative Network Infrastructure (CNI)

Tameside Council has been at the forefront of developing a 50km 'dark' fibre spine network in partnership with the Cooperative Network Infrastructure Ltd. DCMS and BDUK funded Tameside as a Wave 1 Local Full Fibre Network Programme pilot.

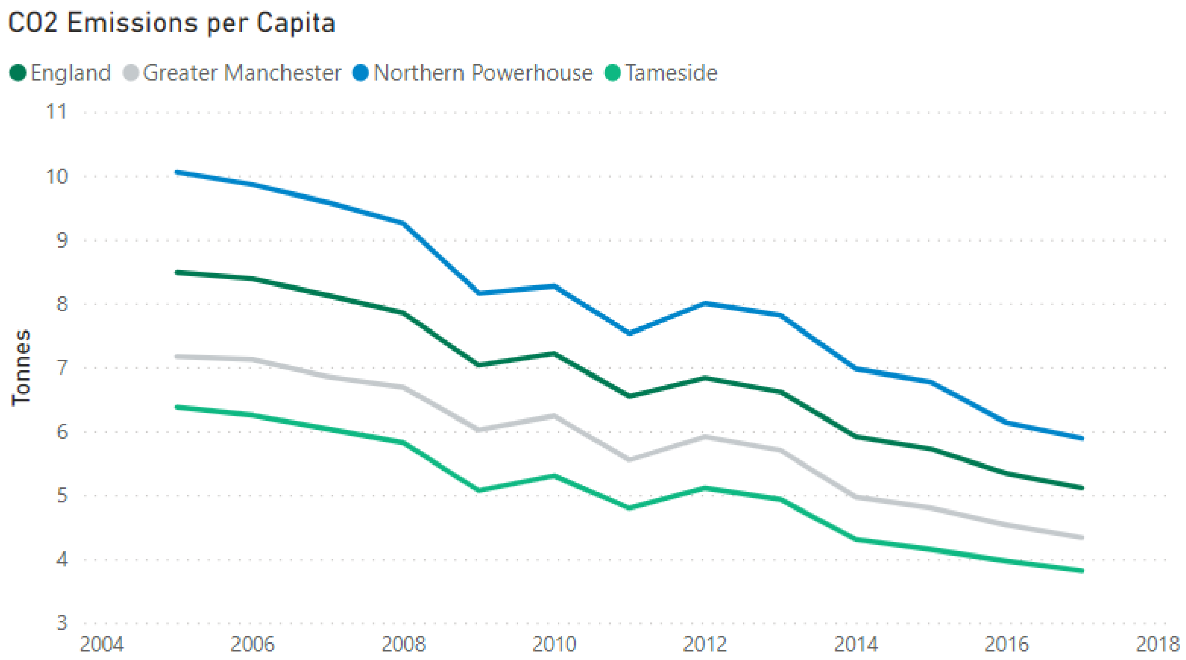
The cooperative offers members wholesale access to fibre and exchange point facilities allowing them to build and operate advanced digital connectivity services. This has facilitated rapid deployment of new 'full fibre' infrastructure. CNI has delivered over 200 commercial fibre to the premises connections in Tameside. The model has received acclaim for successfully pioneering an approach which has aggregated digital infrastructure assets for public use and sharing them with the local business community.



Source: Connected Nations 2018, Ofcom, 2020

Air Quality

The latest air quality data identified Tameside as emitting 858kt in CO_2, which translates into 3.83t emissions per capita. This compares positively against the GM average of 4.35t and 5.12t in England. Tameside has a role to play in supporting GM in meeting the climate change emergency challenge and facilitating clean growth.



Source: BEIS, CO2 emissions estimates 2005-17

Infrastructure – Competitive Position

+ Generally, commercial rents in Tameside are low – the borough has the second cheapest rental prices in industry and office. Conversely, it only has the 7th lowest rental prices in retail.
+ Tameside has the lowest property vacancy rates in industry and office in Greater Manchester, whilst the borough's retail vacancy rate is only the 5th lowest in Greater Manchester.
+ Whilst the borough has less spare capacity in industry and office infrastructure (indicated by low vacancy rates), private and speculative development will be deterred by the low rents in the borough.
+ On the other hand, retail has a higher vacancy rate than the other two sectors and more expensive rent.

Rank	Rental prices - Industry	Vacancy Rate - Industry	Rental prices - Office	Vacancy Rate - Office	Rental prices - Retail	Vacancy Rate - Retail
1	Wigan	Bolton	Oldham	Salford	Rochdale	Oldham
2	Tameside	Oldham	Tameside	Manchester	Oldham	Rochdale
3	Oldham	Rochdale	Rochdale	Bolton	Wigan	Bury
4	Salford	Salford	Wigan	Rochdale	Salford	Bolton
5	Rochdale	Bury	Bolton	Wigan	Bolton	Salford
6	Stockport	Wigan	Bury	Trafford	Bury	Tameside
7	Bolton	Manchester	Stockport	Bury	Tameside	Trafford
8	Bury	Trafford	Trafford	Stockport	Trafford	Manchester
9	Manchester	Stockport	Salford	Oldham	Stockport	Stockport
10	Trafford	Tameside	Manchester	Tameside	Manchester	Wigan

Tameside
Greater Manchester Local Authorities

Source: CoStar (2019). NB: Rental prices ranked by lowest price first; vacancy rate ranked by highest vacancy % first.

Infrastructure – Competitive Position

- Median house prices are relatively low in the Tameside borough at £147,500. Within Greater Manchester Tameside ranks 5th out of the 10 boroughs in terms of housing affordability (house price to workplace earnings ratio).
- Whilst Tameside ranks 9th of all Greater Manchester local authorities in terms of access to ultrafast broadband, it should be noted that digital connectivity is achieved around the country through use of a mix of varying technologies, which are implemented and recalled at different times in different places. For instance, if the indicator is changed from ultrafast to superfast broadband (the latter providing lower average speeds), Tameside ranks first on digital connectivity.
- Tameside has the second lowest CO_2 emissions per capita out of all GM local authorities – this is in spite of a number of locations in Ashton and Denton that exceed EU defined limits on nitrogen dioxide pollutant levels.

Rank	Housing affordability (prices : earnings ratio)	Digital connectivity (access to ultrafast broadband)	CO2 Emissions per Capita
1	Oldham	Wigan	Oldham
2	Bolton	Stockport	Tameside
3	Rochdale	Salford	Wigan
4	Wigan	Bolton	Stockport
5	Tameside	Oldham	Bolton
6	Salford	Trafford	Manchester
7	Bury	Manchester	Rochdale
8	Manchester	Rochdale	Bury
9	Stockport	Tameside	Salford
10	Trafford	Bury	Trafford

Tameside
Greater Manchester Local Authorities

Source: BEIS, CO2 emissions estimates 2005-17; ONS Housing Affordability Ratios 2018; Ofcom broadband coverage

Source: BEIS, CO_2 emissions estimates 2005-17; ONS Housing Affordability Ratios 2018; Ofcom broadband coverage

NB: Affordability ranked most to least affordable; digital connectivity ranked most to least connected; CO_2 emissions ranked least to most per capita.

Social Inclusion

Social Inclusion – Best Start in Life

In Tameside a higher proportion of births are classified as low weight, than in both the North West as a whole and across England. This is likely to disadvantage Tameside residents as they grow due to the health implications which can be a consequence of low weight birth rates. Poor health can contribute to low birth weights.

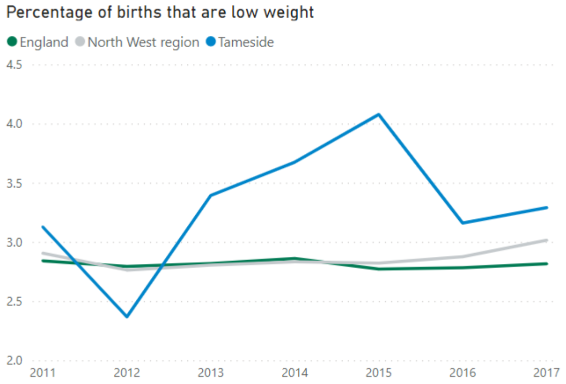
Tameside's childcare offer provides a more positive outlook, 93% of the borough's providers are rated by Ofsted as very good or outstanding.

Similarly, 84% of Tameside's state schools are rated as good or outstanding. There is still progress to be made however in providing Tameside's children with the best start in life, as 14% of schools are either inadequate or require improvement.

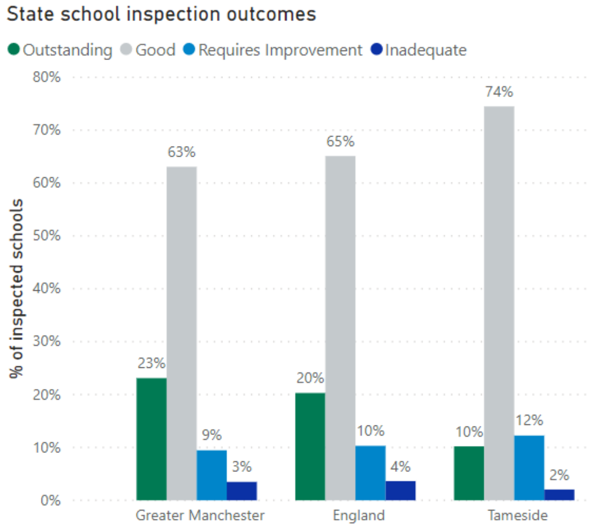
Childcare providers inspection outcomes, 2019

Last full inspection outcome (where 1 is outstanding)	England (%)	Greater Manchester (%)	Tameside (%)
1	18	16	7
2	71	75	86
3	6	4	4
4	1	1	1
Met	3	3	1
Not Met (with actions)	1	0	-

Source: Ofsted, 2019



Source: PHE, 2019

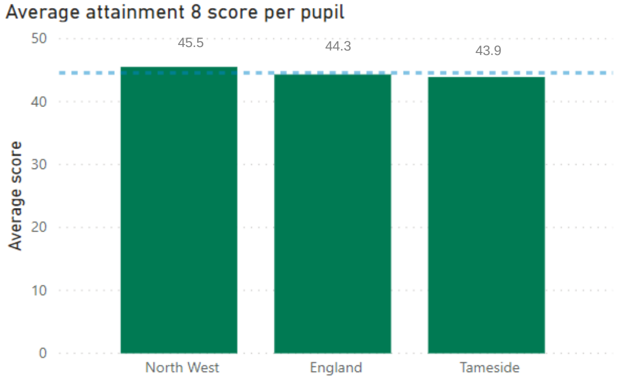


Source: Ofsted, 2019

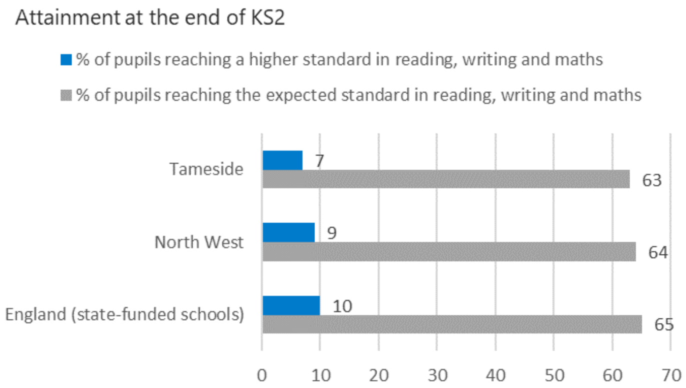
Social Inclusion - Education

By the end of their primary education, a lower proportion of Tameside pupils are reaching the expected standard in reading, writing and maths to prepare them for secondary school than pupils in the North West and in England. This is also reflected in lower achievement of attainment 8 scores at GCSE level.

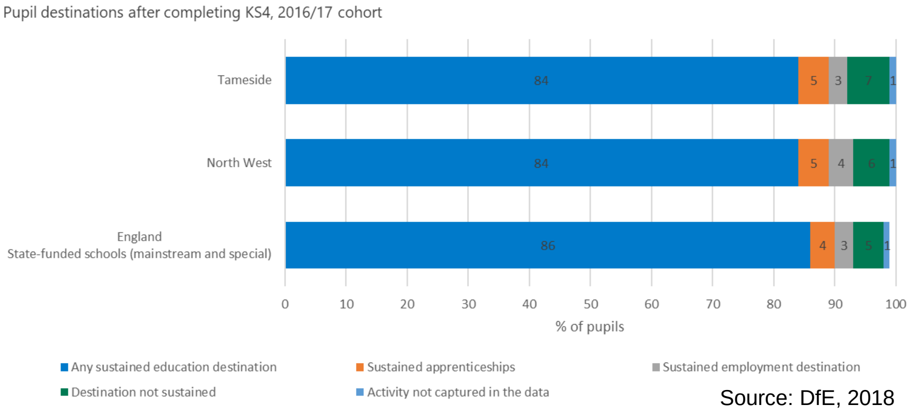
On completion of KS4, lower education levels begin to impact on young people's social inclusion as 7% of pupils have not found a sustained post KS4 destination such as education, apprenticeship or employment. The proportion of pupils who sustain further education, apprenticeships or employment are similar to those in the North West, despite slightly lower levels of educational achievement in Tameside.



Source: DfE, 2017



Source: DfE, 2019



Source: DfE, 2018

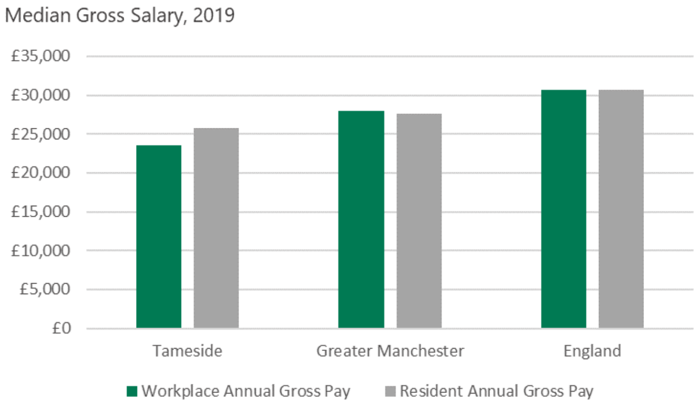
Social Inclusion - Earnings

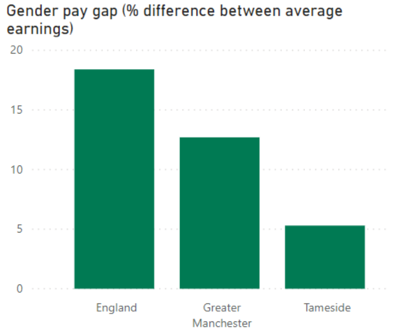
Median gross salaries in Tameside for full-time resident workers stood at £25,769 in 2019 (7% below the GM average). Earnings for Tameside workers are below those of residents at £23,534 suggesting that residents are accessing higher paid employment outside of the borough.

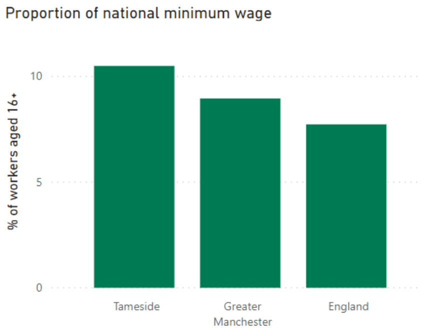
Tameside has experienced strong growth in resident earnings since 2014. This pace of growth has outstripped the rate of growth in comparator geographies.

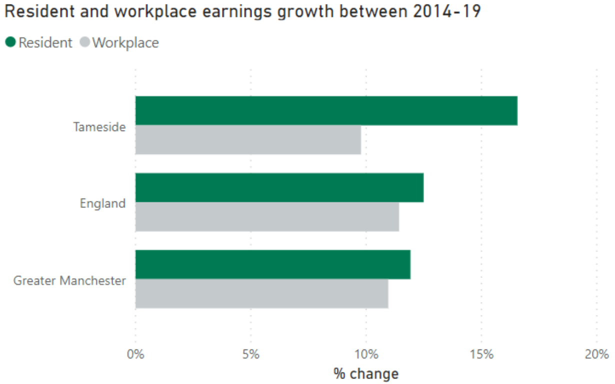
The gender pay gap in Tameside is less acute than comparators, accounting for 5% difference.

Coverage of the National Minimum Wage rates for workers aged 16+ accounts for 10.5% in Tameside.









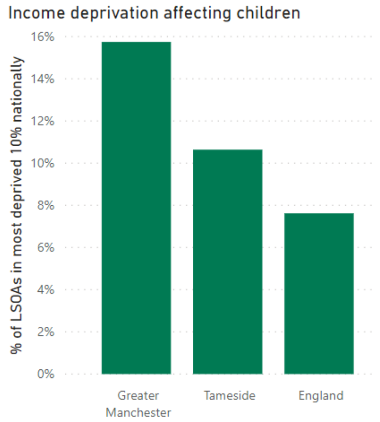
Source: ONS, ASHE, 2019

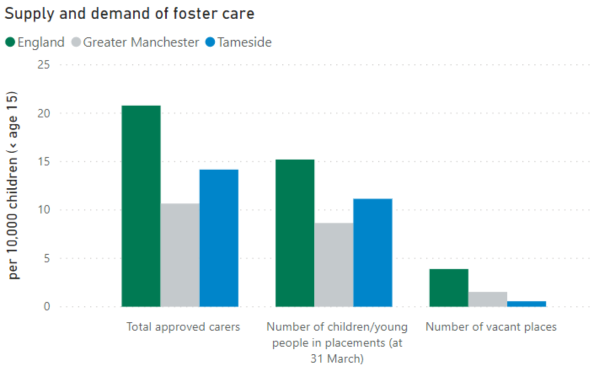
Social Inclusion – Resilient Families

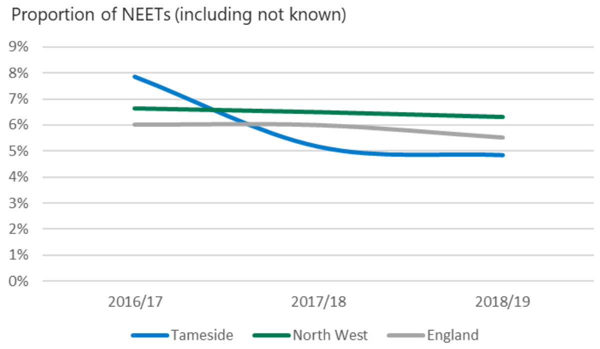
Tameside has approximately 10% of Lower Super Output Areas (LSOAs) in the most deprived nationally for income deprivation affecting children.

The demand for foster care is relatively high in Tameside compared to GM, and there is a relatively low proportion of vacant foster care places in the borough.

The proportion of young people not in employment, education or training (NEET) has fallen markedly over time in Tameside, from 8% in 2016/17 to 4.8% in 2018/19. This figure consists of 2.9% of young people known to be NEET, and 1.9% for whom activity is not known. The NEET plus unknown position in Tameside is now below the North West and England average. In comparison, Tameside's known NEET figure at 2.9% is above the England average of 2.6%.







Source: DfE, 2019; Ofsted, 2019

Social Inclusion – Competitive Positioning

Tameside offers the highest rated childcare in GM which provides a good start in life. However, the borough ranks middling for education attainment at primary and secondary and the proportion of young people not in employment, education or training is a concern in Tameside.

Tameside residents have one of the lowest median salaries in GM, with only one borough, Oldham, scoring poorer on this measure.

Rank	Low birth weight	Good childcare (% rated level 1 or 2)	Vacant foster care places per 10,000 children	% reaching expected standard by end of KS2	Average attainment 8 score	Proportion of 16-18 year old as NEETs	Median resident salary
1	Rochdale	Tameside	Wigan	Trafford	Trafford	Wigan	Trafford
2	Oldham	Wigan	Bolton	Stockport	Stockport	Manchester	Stockport
3	Bolton	Rochdale	Oldham	Wigan	Wigan	Salford	Bury
4	Manchester	Stockport	Trafford	Bury	Bury	Bolton	Wigan
5	Tameside	Bury	Salford	Salford	Bolton	Rochdale	Salford
6	Salford	Bolton	Rochdale	Tameside	Tameside	Oldham	Manchester
7	Bury	Oldham	Manchester	Bolton	Rochdale	Trafford	Bolton
8	Trafford	Trafford	Stockport	Oldham	Manchester	Tameside	Rochdale
9	Wigan	Salford	Tameside	Manchester	Oldham	Bury	Tameside
10	Stockport	Manchester	Bury	Rochdale	Salford	Stockport	Oldham

Tameside
Greater Manchester Local Authorities

Note: Low birth rates from 2017; childcare rates from 2018; average attainment 8 score from 2018.

Source: PHE, 2017; Ofsted, 2018 ONS, 2019; DfE, 2019; ASHE, 2019.

Tameside Metropolitan Borough

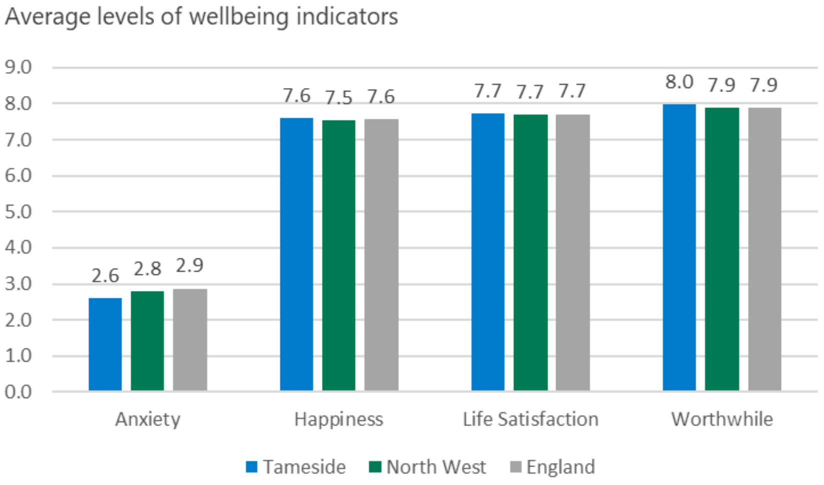
HATCH REGENERIS

Healthy Communities

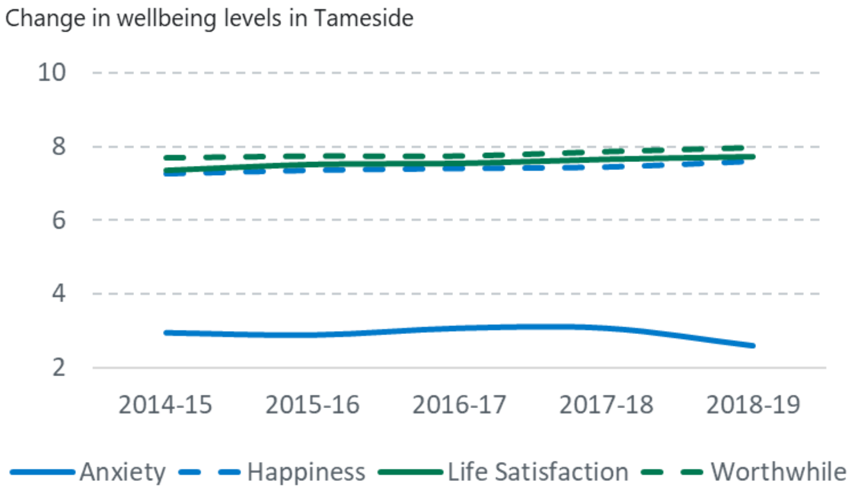
Well-being

Tameside has similar or better levels of wellbeing compared to the NW and England. Tameside residents are less likely to suffer from anxiety, and more likely to experience happiness, life satisfaction and feelings of being worthwhile.

Tameside compares well against other GM boroughs on experiences of well-being, especially in terms of anxiety.



Source: ONS, 2019



Source: ONS, 2019

Health

Life expectancy in Tameside is similar to Greater Manchester. However, in England, people tend to live two years longer.

The proportion of life spent in good health is below average in Tameside, accounting for 72% for women and 78% for men. This is below the GM and England average.

The quality of health provision is strong in Tameside, with the NHS Tameside and Glossop CCG rated outstanding. Tameside also has a highly rated community care provision, with 71% rated good. Domiciliary care agencies are highly rated, with 89% considered good or outstanding, whilst 67% of nursing homes are considered good.

CCG Rating

CCG name	% of LA in CCG	Overall NHS England Rating	Quality of Leadership Rating
NHS Tameside and Glossop CCG	0.88	Outstanding	Outstanding

Source: Tameside local authority area profile, Care Quality Commission, 2019

Tameside Metropolitan Borough

Life Expectancy and Healthy Life Expectancy

Area	Female			Male		
	Life expectancy at birth	Healthy life expectancy at birth	% life in good health	Life expectancy at birth	Healthy life expectancy at birth	% life in good health
England	83	64	77%	80	63	79%
Greater Manchester	81	61	75%	78	61	78%
Tameside	81	58	72%	78	60	77%

Source: ONS, 2018

Care services

Area	Inadequate	R.I	Good	Outstanding	Unrated
Community care services					
Comparators	0%	6%	68%	3%	22%
England	0%	8%	72%	4%	16%
Tameside	0% (0)	14% (1)	71% (5)	0% (0)	14% (1)
Domiciliary care agencies					
Comparators	0%	11%	64%	2%	21%
England	1%	11%	66%	4%	19%
Tameside	0% (0)	6% (1)	83% (15)	6% (1)	6% (1)
Nursing homes					
Comparators	3%	21%	68%	2%	6%
England	2%	20%	69%	4%	4%
Tameside	0% (0)	33% (4)	67% (8)	0% (0)	0% (0)

Source: Tameside local authority area profile, Care Quality Commission, 2019

HATCH REGENERIS

Health – Competitive Positioning

Tameside performs relatively well in terms of wellbeing indicators compared with the other GM boroughs, particularly in terms of the proportion of people with low anxiety levels and high life satisfaction.

However, Tameside is amongst the lowest boroughs in terms of healthy life expectancy.

Tameside's proportion of good or very good nursing homes is also not as good as most other boroughs in GM.

Rank	Anxiety	Happiness	Life satisfaction	Worthwhile life	Life expectancy	Healthy life expectancy	Proportion of nursing homes rated good or higher
1	Tameside	Trafford	Trafford	Stockport	Trafford	Trafford	Stockport
2	Wigan	Stockport	Stockport	Trafford	Stockport	Stockport	Bury
3	Stockport	Bury	Tameside	Wigan	Bury	Wigan	Wigan
4	Trafford	Wigan	Wigan	Salford	Bolton	Bury	Salford
5	Oldham	Tameside	Bolton	Tameside	Wigan	Bolton	Bolton
6	Salford	Salford	Salford	Rochdale	Oldham	Rochdale	Tameside
7	Manchester	Manchester	Bury	Bury	Tameside	Oldham	Rochdale
8	Rochdale	Bolton	Manchester	Bolton	Rochdale	Tameside	Manchester
9	Bolton	Oldham	Rochdale	Manchester	Salford	Salford	Oldham
10	Bury	Rochdale	Oldham	Oldham	Manchester	Manchester	Trafford

Tameside
Greater Manchester Local Authorities

Note: Life expectancy and health life expectancy are at birth and for the years 2016-18; childcare rates from 2018; average attainment 8 score from 2018.

Source: ONS 2019, CQC, 2019 .

Strengths, Weaknesses, Opportunities & Threats

Economic Strengths

Tameside has a number of defining strengths:

+ **Location:** Tameside's proximity to Manchester City Centre, and positioning as part of the Greater Manchester city region is a key driver of growth.

+ **Highly connected:** Tameside has excellent connections to the strategic road network including the M60, A635 and A57; position on the Manchester-Yorkshire rail connection (10 minutes from Ashton to Manchester Victoria), the Ashton-Piccadilly Metrolink, and proximity to Manchester Airport. Furthermore, Tameside has pioneered rapid deployment of new full fibre infrastructure which has secured commercial fibre to premises with recent research by Think Broadband showing Tameside ranks 6th in the country for full fibre availability.

+ **Affordable location:** Tameside is a relatively affordable location to live, work and invest.

+ **Sector strengths:** Tameside has significant strengths in manufacturing and health sectors. Tameside has the highest concentration of Advanced Manufacturing & Engineering employment with specialisms including the manufacture of medical and dental instruments and engineering activities and technical consultancy. Tameside has significant health assets to lever, and the sector employs 10,000 people in the borough and is growing. Specialisms include the manufacture of pharmaceutical preparations and hospital activities. Together, manufacturing, public administration education and health account for 65% of Tameside's GVA although there is scope for considerable productivity improvement. Key word analysis of Tameside's businesses points to the digitalisation of the manufacturing sector and health care sector which will support productivity improvements.

Economic Strengths (Cont'd)

+ **Workforce:** Tameside has a population of 225,200 which has grown steadily and is anticipated to continue to grow. Tameside has a strong **intermediate** skill base, with 50% of residents holding NVQ L3 and above qualifications.

+ **Access to countryside:** Stalybridge, Mossely and Mottram sit next to the Pennines offering attractive, historic towns with access to excellent countryside.

+ **Education:** Tameside has a quality education offer, with 94% of Tameside's state schools rated good or outstanding with improving educational attainment. The Further Education sector has experienced significant investment as part of Vision Tameside and the quality and increased breadth of the offer has enabled Tameside College to grow market share and attract young people into the borough to study. Furthermore, Ashton Sixth Form College is recognised as outstanding in all areas by Ofsted.

Economic Weaknesses

There are a number of economic weaknesses holding back Tameside's potential:

+ **Productivity gap:** Productivity growth is extremely low and Tameside is lagging 11% behind the GM average on labour productivity measures and 24% behind England. Sector and skills composition are important contributing factors to the Tameside productivity challenge. A significant share of Tameside's GVA is held in higher value sectors such as manufacturing however the productivity levels of this activity in Tameside falls significantly short of national comparators (-33% gap).
+ **Sector composition:** Retail, wholesale trade and public admin, education and health are important employers within Tameside (accounting for 51% of employment). These sectors are particularly exposed to changing consumer patterns and public sector austerity measures.
+ **A shortage of local jobs:** Tameside has a very low job density with only 0.57 of a job per working age resident. Residents are reliant on employment opportunities elsewhere, within only 47% of residents living and working within the borough. There is a lack of available sites and premises within Tameside to facilitate local jobs growth.
+ **Low entrepreneurial culture:** Tameside has a low business birth rate and self-employment levels are below average. However, those business start-ups are more likely to survive longer in Tameside, pointing to a supportive environment for growth.
+ **Development site viability gaps:** It is difficult to deliver housing and particularly new employment land on sites in Tameside. This can be attributed to a mix of low values, brownfield remediation requirements and low quality sites. This impacts on Tameside's ability to secure new (and retain existing) investment and employment growth. This is illustrated by the under-representation of Tameside in securing a proportionate share of inward investment within GM.

Economic Weaknesses (Cont'd)

- **Quality of commercial and industrial premises:** The quality of existing commercial and industrial buildings undermines the ability of Tameside to attract new investors and respond to opportunities presented by GM's identified opportunity sectors which will drive future productivity gains.
- **Labour market deficiencies**: Tameside has a below average working age population and this is expected to decline further in the future, leading to a reduced labour supply. Tameside has a strong intermediate and low skill set, but representation of higher level skills and occupations falls short of GM and England benchmarks. As the demand for higher level skills continues to grow, Tameside needs to be ready to respond.
- **Education:** positive steps have been made in the quality of Tameside's education offer in recent years however attainment levels still lag the national position.
- **Prevalent inequalities:** Tameside is characterised by inequalities which limit life chances, health and prosperity. Opportunities to address these issues through an inclusive growth strategy which enables everyone to benefit from economic growth is essential.

Economic Opportunities

There are a number of opportunities which could define Tameside's future:

- **The Tameside place proposition:** Tameside offers a network of towns and villages on the edge of the Pennines which have the potential to lever investment and attract people to live and invest in the borough. Creative thinking is required to secure jobs, businesses and homes needed to enable these towns to thrive.
- **Delivering new housing:** Tameside can respond to the identified housing needs of GM particularly through an offer of entry level and larger housing for families, and has the potential to deliver aspirational higher value housing in attractive locations on the edge of Tameside. This will help to redress the demographic challenge ahead of Tameside including a forecast declining working age population. It will also create supply chain opportunities in the construction sector and facilitate the development of the clean growth sector.
- **Securing investment in GM identified opportunity sectors:** Tameside has significant sector strengths which can be levered to support GM realise their LIS ambitions across all four priority sectors, particularly within AME and Health. Tameside needs to maximise its role and position in LIS actions which will drive productivity and competitiveness in these sectors.
- **Digital potential:** the dark fibre loop gives Tameside a competitive advantage which can drive commercial investment. The proximity of Tameside to the city; affordable property, and digital connectivity can facilitate business start ups and homeworking.
- **Access to major employment opportunities:** Tameside has historically relied upon employment outside of the borough. Tameside residents need to ensure they have the skills and transport infrastructure to access new employment opportunities as they emerge across the city. At the same time, opportunities to deliver major employment sites within Tameside such as Ashton Moss and St Petersfield are essential to ensuring Tameside secures future growth potential.
- **Enhanced transport connectivity:** proposals such as the Transpennine rail electrification will bring Tameside closer to Leeds, providing an additional dimension to Tameside's ability to lever city-region growth potential.
- **Levering anchor institutions:** Tameside has made great strides in joint commissioning through the CCG and Council collaboration. There is significant scope for continued leverage of anchor institutions in Tameside e.g. securing good growth outcomes through public procurement and encouraging corporate social responsibility.

Economic Threats

Tameside needs to be responsive to emerging threats:

+ **Macro Economic Factors:** we are entering a period of economic uncertainty likely as the UK's future relationship with the EU is negotiated. Risks revolve around sectors trading with the EU (including supply chains), general investment climate, availability of workforce and future trade deals. Tameside needs to be resilient in the face of these external forces and business support mechanisms in Tameside need to be enhanced to navigate businesses through these challenges. Furthermore, the global pandemic has had a far-reaching economic impact which is yet to be fully understood in Tameside. Tameside will need to prioritise economic recovery in the short-term to mitigate against further contraction.

+ **Demographic change:** the ageing of the population and the forecast decline in working age in Tameside will tighten the available labour market and put increased pressure on population-related services.

+ **Technology and innovation:** disruptors such as automation will shape economic futures, creating new sectors and changing working practices. Tameside needs to embrace and invest in innovation and technology to maintain competitiveness.

+ **Competition:** Growth and investment elsewhere in GM and the UK is redefining economic geographies and increasing competition. Other GM boroughs are pushing forward with major developments such as Cutacre, Oldham Town Centre and Bolton Town Centre regeneration, Stockport etc. Tameside needs to progress pipeline proposals such as Ashton Moss, St Petersfield and Godley Green to retain and secure additional investment. Tameside's competitive position is further undermined by labour market weaknesses including an underrepresentation of higher level skills, low salaries, and social inclusion challenges.

+ **Infrastructure constraints:** constraints in the site and premises offer, road and rail networks, and digital connections will impact on the ability of Tameside to secure investment and ensure Tameside residents can access economic opportunities.

Conclusions & Implications for Strategy

Tameside's Economic Baseline – Headline Findings

The following table summarises the headline findings from the Tameside Economic Baseline against the 8 priority areas of the Tameside Corporate Plan ' Our People – Our Place – Our Plan'.

Our People – Our Place – Our Plan	Tameside Economic Baseline Findings
Priority 1 – Very Best Start in Life where children are ready to learn and encouraged to thrive and develop	• Above average proportion of births classified as low weight in Tameside relative to England and the NW • Supportive childcare system, with 93% of childcare providers rated good or outstanding by Ofsted • Quality state school offer, with 84% of state schools in Tameside rated good or outstanding by Ofsted
Priority 2 – Aspiration and hope through learning and moving with confidence from childhood to adulthood	• Lower proportion of KS2 pupils in Tameside reaching the expected standard in reading, writing and maths and lower achievement of Progress 8 scores at GCSE • Less likely to continue in education at age 16, and more likely to participate in apprenticeships or employment • Post-16 skills assets including Tameside College with specialisms in manufacturing and construction, and various sixth forms including Ashton recognised as outstanding across all areas by Ofsted
Priority 3 – Resilient Families and Supportive networks to protect and grow our young people	• 10% of Tameside's LSOAs are in the 10% most deprived nationally for income deprivation affecting children • The demand for foster care is relatively high in Tameside at 11 children per 10,000 and there are very few vacant foster care places in the borough • Improving picture with a declining rate of young people not in employment, education or training (NEET) over time but the known NEET figure at 2.9% is slightly above the England average of 2.6%

Tameside's Economic Baseline – Headline Findings

Our People – Our Place – Our Plan	Tameside Economic Baseline Findings
Priority 4 – Opportunities for people to fulfil their potential through work, skills and enterprise	• Approximately 71,000 people are employed in Tameside, accounting for 5% of all employment in GM. Employment growth has been steady but the rate of growth has been below all other GM authorities in past 5 years • There are 6,140 businesses in Tameside, accounting for 5.9% of all businesses in GM. The business base has grown by 6% since 2015. • Tameside has lagging productivity growth, with a productivity gap of 11% between Tameside and GM and 24% relative to England as defined by GVA per FTE • Sector specialisms in the borough include public administration, education and health, manufacturing, retail, and utilities and waste • Tameside has distinct strengths in GM LIS opportunity sectors including advanced manufacturing and materials, health innovation, and clean growth • The knowledge economy accounts for 1,475 jobs in Tameside but is under-represented relative to England • Tameside has a relatively supressed enterprising economy, with only 6.1 business births per 1,000 working age residents compared to 12 in GM as a whole and self-employment and homeworking levels below GM and England averages • Tameside has secured a relatively low proportion of inward investment into GM over the past 6 years at 2.5% of the GM total • Tameside is home to 225,000 people, accounting for 8% of the GM population. Population growth has been slow, at 2% since 2013. Looking ahead, the population is anticipated to grow by 6% by 2041. • Tameside has a low job density rate of 0.57 (per resident aged 16-64) compared to 0.85 in GM. A high number of Tameside residents commute out of the borough to access employment and the self-containment rate (those who live and work in Tameside) is relatively low at 47% • Tameside has comparatively good rates of labour market participation relative to GM but lags the England average • Higher level occupations are under-represented in Tameside, although this is an improving position • Higher level qualifications are significantly under-represented in Tameside at 29% relative to 44% in England

Tameside's Economic Baseline – Headline Findings

Our People – Our Place – Our Plan	Tameside Economic Baseline Findings
Priority 5 – Modern infrastructure and a sustainable environment that works for all generations and future generations	• Digital infrastructure strengths including the Tameside Dark Fibre Network with Tameside ranked 6th nationally for full fibre availability according to Think Broadband • Excellent proximity to the strategic road network, connections by rail and Metrolink, and proximity to the airport • Relatively affordable housing offer, with the average house price 6.27 times average annual workplace-based salary in Tameside compared to 7.83 in England • Housing market indicators point to a need to broaden the stock offer and encourage the development of more aspirational housing • Viability gaps on development sites make it difficult to deliver new housing and employment require public sector intervention • Very low vacancy rates in industrial premises reflective of sustained demand • The quality of existing commercial premises presents a barrier to securing investment • Employment opportunity sites including St. Petersfield and large scale potential of Ashton Moss • Relatively low CO2 emissions at 3.83t per capita relative to 5.12t in England
Priority 6 – Nurturing our communities and having pride in our people, our place and our shared heritage	• Tameside residents are less likely to suffer from anxiety, and more likely to experience happiness, life satisfaction and feelings of being worthwhile • A network of towns and villages with access to excellent countryside in the Pennines
Priority 7 – Longer and healthier lives with good mental health through better choices and reducing inequalities	• The proportion of life spent in good health is below GM and national average in Tameside, at 72% for women and 78% for men • Life expectancy has improved over time in line with national trends, but lags the national average by 2 years (81 years in Tameside compared to 83 years in England as of 2018) • The quality of health provision is strong in Tameside, with the CCG rated outstanding
Priority 8 – Independence and activity in older age, and dignity and choice at end of life	• 71% of community care services in Tameside are rated good but a further 14% require improvement • 67% of nursing homes in Tameside are rated good but a further 33% require improvement • 89% of domiciliary care agencies are rated good or outstanding, with a further 6% requiring improvement

Summary and Implications for the Inclusive Growth Strategy

*Five Defining...***Strengths**

1. Proximity and positioning of Tameside within the Greater Manchester city region as a driver of growth
2. Sectoral strengths in GM identified opportunity sectors including AME and health
3. Excellent connectivity including digital infrastructure and strategic transport accessibility as drivers of growth
4. Quality of life offering including attractive historic towns with access to the Pennines countryside
5. Improving education offer characterised by good and outstanding ratings and continued investment in Further Education provision

*Five Defining...***Weaknesses**

1. Pervasive productivity challenges which inhibit Tameside's growth potential
2. A shortage of good quality and well paid local jobs
3. Lack of high quality sites and premises to attract and retain investment
4. Labour market weaknesses stymying effective demand and supply interaction and holding back productivity
5. A comparatively low rate of entrepreneurship and the need to strengthen infrastructure to encourage entrepreneurship and innovation
6. Deep-rooted inequalities which limit life chances, health and prosperity

*Five Defining...***Opportunities**

1. Enhanced place propositions to drive growth through a network of towns and capitalise upon proximity to city and natural capital
2. Enhanced connectivity (transport and digital) to facilitate access to employment and stimulate entrepreneurship
3. Major developments including new housing developments, employment sites (Ashton Moss, St. Petersfield) and local transport investments presenting supply chain opportunities
4. Securing investment in opportunity sectors including AME and health and driving competitiveness through digitalisation, upskilling and innovation
5. Levering anchor institutions and the role of public procurement in driving good growth outcomes as already demonstrated by joint commissioning

***Five Defining...*Threats**

1. Macro economic factors including the uncertainties created by EU exit and the recent global pandemic
2. Demographic change is contributing to an ageing population in Tameside and a forecast decline in the working age population is anticipated, tightening labour supply and placing pressure on services
3. Technology and innovation are disruptive forces to which Tameside needs to respond to maintain competitiveness
4. Strong competition for growth and investment elsewhere in GM and the UK is undermining Tameside's ability to retain and secure investment
5. Infrastructure constraints will impact on Tameside's ability to secure investment and enable equitable access to economic opportunities

Implications for the Inclusive Growth Strategy – Strengths

The review of the economic evidence for Tameside has highlighted a number of areas of focus for the emerging Inclusive Growth Strategy. These are framed around the defining strengths, weaknesses, opportunities and threats identified in this report.

Maximising Strengths	**IGS Focus**
Proximity and position of Tameside within the GM city region as a driver of growth	• Develop value proposition of Tameside as a place to invest, live and visit • Raise the profile of Tameside within GM to maximise MIDAS activity and secure increased share of investment interest • Embed Tameside investment priorities in GM priorities and prepare to develop business cases
Sectoral strengths in GM opportunity sectors including AME and health	• Scale up existing activity in Tameside opportunity sectors • Target inward investment and support existing investors to increase quality jobs • Target specific sites and locations for sector growth • Develop the right skills for the future economy including high level, digital, and leadership and management • Strengthen local supply chains to support local businesses to grow and prosper • Secure investment to drive future competitiveness of key sectors e.g. R&D, sites
Excellent connectivity including digital and strategic transport infrastructure	• Ensure the transport system links residents to jobs and services inside and outside of the borough • Promoting the digital edge Tameside offers to investors
Quality of life including attractive towns and countryside	• Attract and retain talent to grow the working age population • Facilitating vibrant mixed use town centres as a destination for investment: live, work, leisure, services
Improving education offer	• Retain and attract young and working age people to the borough to study • Upskill and reskill residents and workers to access quality employment opportunities • Expand higher education offer to retain and attract young people • Build connections with GM universities

Implications for the Inclusive Growth Strategy – Weaknesses

Mitigating Weaknesses	IGS Focus
Pervasive productivity challenges inhibiting Tameside's growth potential	• Tackle in-sector productivity challenges to improve products, processes and capabilities through effective business support • Develop a skills strategy including sector skills in the AME and health sector
A shortage of local jobs, combined with a lack of quality sites and premises to attract and retain investment	• Deliver sites and premises to attract and retain investment, including incubator facilities, grow on space to retain and grow local businesses, and larger employment premises to secure new investors • Support entrepreneurship initiatives to deliver business growth • Capitalise on major investments delivering jobs in close proximity to Tameside by providing effective connections for workers, and scoping supply chain opportunities for businesses
Labour market deficiencies holding back productivity	• Upskill existing workforce to meet employer demand with a focus on higher level skills and training geared to growth sectors and technologies • Responsive education institutions providing appropriate and quality education and skills including expanded HE offer • Deliver digital skills to all • Implement management and leadership skills to drive innovation and growth appetite
A low entrepreneurial culture and gaps in supporting infrastructure to facilitate entrepreneurship and innovation	• Encourage business start up and social enterprise • Increase self-employment and home working • Invest in leadership and management skills to facilitate innovation
Pervasive inequalities limiting life chances, health and prosperity	• Promote social mobility and inspire progression • Encourage healthier lifestyles and preventative care • Increase accessibility to high quality care in response to ageing population drivers of change • Utilise technology to improve service provision • Digital inclusion to enable all people to access services, education and employment opportunities

Implications for the Inclusive Growth Strategy – Opportunities

Harnessing Opportunities	IGS Focus
Enhanced place proposition driving growth through a network of towns, capitalising upon proximity to city and natural capital	• Tailored response to supporting growth in towns as vibrant hubs, maximising key assets and infrastructure and build on plans for investment and development • Place marketing of Tameside as a place to live, work, study and invest
Enhanced connectivity to facilitate access to employment and stimulate entrepreneurship	• Connect residents by transport to other parts of GM where the highest number of jobs are predicted • Roll out sustainable transport i.e. cycling, walking, electric vehicles • Digital inclusion strategy
Major developments in the pipeline and proposed	• Increase quality, affordability and choice in housing • Increase quality employment sites and premises aligned to demand • Design new places and spaces in a way that promote healthy lifestyles • Maximise competitive digital connectivity offer
Securing investment in opportunity sectors such as AME and health	• Unlock pipeline employment sites for investment • Raise Tameside's profile as a destination for investment, including through delivery of development at Ashton Moss and St. Petersfield • Invest in innovation, technology and skills to drive competitiveness
Levering the economic and social contribution of anchor institutions	• Lobbying for investment in vital infrastructure • Leadership role in influencing positive change and empowering residents and businesses to take advantage of opportunities ahead of them • Innovation-led growth by anchor institutions e.g. technology in health • Delivering social value / corporate social responsibility • Pursue positive procurement practices

Implications for the Inclusive Growth Strategy – Threats

Combatting Threats	IGS Focus
Macro economic factors including uncertainties created by EU exit	• Tailored business support providing bespoke trade and investment advice • Targeted strategic account management of prime employers
Demographic change contributing to an ageing population and a forecast decline in working age cohort	• Support older workers to reskill • Responding to flexible work patterns sought by parents, older workers and people with health issues • Support people into work
Technology and innovation as disruptive forces	• Mitigating impacts of automation i.e. through upskilling and reskilling, and supporting businesses to respond to these drivers of competitiveness • Embracing new ways of working and new employment opportunities presented by technology • Addressing the digital skills gap • Utilise new and emerging technologies to design and deliver services to businesses and residents
Competition for growth and investment from other locations	• Grow profile of Tameside's role and contribution on the GM stage with a focus on Tameside's distinct strengths including sectors (AME and health), location (natural capital), and infrastructure offer (digital and transport)
Infrastructure constraints impacting on Tameside's ability to secure investment and enable equitable access to opportunities	• Opportunities to intensify land use in well connected places to support local economic growth / diversify high streets • Effectively connect housing, jobs, leisure and services through targeted transport investment • Continued investment in digital infrastructure to maintain competitive position • Invest in smart city solutions

Tameside's Economic Baseline – GM Strategic Implications

The GM Local Industrial Strategy sets out a wide range of actions to strengthen the city-region's economy, improve the foundations of productivity, and ensure that growth benefits all people and places. Tameside has an active role to play in implementing the ambitions of the LIS.

GM LIS Priorities/Action	Tameside Role & Positioning
Theme 1 – Health Innovation	• Tameside has sector and institutional strengths in health care provision • Potential to be test bed for large scale clinical and med tech trials • Active participation in healthy ageing innovation activity
Theme 2 – Advanced Materials & Manufacturing	• Tameside has sector strengths in manufacturing/AME • Strengthen Tameside's advanced manufacturing cluster and network in to advanced material ecosystem including participation in GAMMA alliance and HE-industry collaboration • Improve productivity in Tameside's manufacturing base through adoption of Made Smarter approaches
Theme 3 – Digital, Creative and Media	• Emerging digital cluster around Ashton Old Baths with recent employment and business growth • Lever 'dark fibre' competitive advantages to drive growth and revitalise town centres • Support firms to adopt productivity enhancing digital technologies • Transform the local economy and public services through enhancing digital skills and open data availability
Theme 4 – Clean Growth	• Contributing to the GM Clean Growth Mission and implementing action within Tameside • Accelerate carbon neutral retrofit and net zero carbon new build • Support energy transition and scope for local energy generation, storage and efficiency in Tameside • Active participation in modern methods of construction to support new manufactured homes industry • Address construction skill requirements

Tameside's Economic Baseline – GM Strategic Implications

GM LIS Priorities/Action	Tameside Role & Positioning
Theme 5 – People	• Tameside's 'Care Together' approach provides a trailblazer for joint working between health and other public services and provides a platform for aligning skills and work. The Greater Manchester 'Working Well' initiative provides an integrated approach to employment support and has supported 1,780 clients in Tameside since 2014 • Active participation in employability and retraining initiatives proposed by the LIS
Theme 6 – Infrastructure	• Ensure Tameside representation in the GM Single Infrastructure Plan and associated actions to address deficiencies in Tameside's transport, site and low carbon infrastructure • Maximise local supply chain opportunities from major projects such as HS2 and NPH Rail • Lever Tameside's fibre infrastructure to drive economic growth and innovation and encourage roll out of 5G technologies • Deliver employment development at Ashton Moss and St. Petersfield in target sectors and ideally in higher value, higher quality employment sectors • Identify opportunities to diversify the borough's housing stock, bringing more family and higher value housing that will support the borough's future growth
Theme 7 – Ideas	• Support innovative activity in areas where Tameside has sector strengths including manufacturing and health • Use public procurement to stimulate innovation areas e.g. Tameside Care Together opportunity
Theme 8 – Business Environment	• Targeted business support including productivity/inclusive growth programme, internationalisation, scale up support • Participation in GM Good Employment Charter • Enhanced productivity of important foundational sectors in Tameside including retail, hospitality and tourism, and social care • Enhanced social value procurement policy • Engage with social enterprise strategy development
Theme 9 – Place	• Identify opportunities and barriers in Tameside aligned to the LIS and develop action plans to coordinate GM and Tameside implementation and delivery • Secure investment to drive public sector transformation to improve outcomes and reduce inequalities

Appendices

Appendix A: Opportunity Sector SIC Definitions

+ Advanced Manufacturing and Materials

SIC	Description
20	Manufacture of chemicals and chemical products
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
26	Manufacture of computer, electronic and optical products
27	Manufacture of electrical equipment (electronics)
28	Manufacture of machinery and equipment not elsewhere classified (automotive)
29	Manufacture of motor vehicles, trailers and semi-trailers (automotive)
30	Manufacture of other transport equipment (aerospace etc.)
33	Repair and installation of machinery and equipment
325	Manufacture of medical and dental instruments and supplies
7112	Engineering activities and related technical consultancy

+ Digital, Media, Creative and Tech

SIC	Description
Digital, Media, Tech:	
26.1	Manufacture of loaded electronic boards
26.2	Manufacture of computers and peripheral equipment
26.3	Manufacture of communication equipment
26.4	Manufacture of consumer electronics
27.32	Manufacture of other electronic and electric wires and cables
46.5	Wholesale of information and communication equipment
58	Publishing activities
59	Motion picture, video and television programme production, sound recording and music publishing activities
60	Programming and broadcasting activities
61	Telecommunications
62	Computer programming, consultancy and related activities
63	Information service activities
95.1	Repair of computers and communication equipment
Creative:	
32120	Manufacture of jewellery and related articles
70210	Public relations and communication activities
71111	Architectural activities
71112	Urban planning and landscape architectural activities
73110	Advertising agencies
73120	Media representation
74100	Specialised design activities
74201	Portrait photographic activities
74202	Other specialist photography (not including portrait photography)
74203	Film processing
74209	Other photographic activities (not including portrait and other specialist photography and film processing) nec
74300	Translation and interpretation activities
85520	Cultural education
90010	Performing arts
90020	Support activities to performing arts
90030	Artistic creation
90040	Operation of arts facilities
91011	Library activities
91012	Archive activities
91020	Museum activities

Appendix A: Opportunity Sector SIC Definitions

+ Health

SIC	Description
Health:	
3250	Manufacture of medical and dental instruments and supplies
8610	Hospital activities
8621	General medical practice activities
8622	Specialist medical practice activities
8623	Dental practice activities
8690	Other human health activities
8710	Residential nursing care activities
8720	Residential care activities for learning disabilities, mental health and substance abuse
8730	Residential care activities for the elderly and disabled
8790	Other residential care activities
Life Sciences and Pharmaceutical:	
21100	Manufacture of basic pharmaceutical products
21200	Manufacture of pharmaceutical preparations
26600	Manufacture of irradiation, electromedical and electrotherapeutic equipment
32500	Manufacture of medical and dental instruments and supplies
72110	Research and experimental development on biotechnology
72190	Other research and experimental development on natural sciences and engineering

+ Clean Growth

SIC	Description
6.2	Extraction of natural gas
35.1	Electric power generation, transmission and distribution
35.3	Steam and air conditioning supply
38.2	Waste treatment and disposal

Appendix A: Opportunity Sector SIC Definitions

+ Knowledge Economy (SIC)

18110 : Printing of newspapers

18121 : Manufacture of printed labels
18129 : Printing (other than printing of newspapers and printing on labels and tags) nec
18130 : Pre-press and pre-media services
18140 : Binding and related services
18201 : Reproduction of sound recording
18202 : Reproduction of video recording
18203 : Reproduction of computer media

26200 : Manufacture of computers and peripheral equipment
26301 : Manufacture of telegraph and telephone apparatus and equipment

26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment)
58110 : Book publishing
58120 : Publishing of directories and mailing lists

58130 : Publishing of newspapers
58141 : Publishing of learned journals
58142 : Publishing of consumer, business and professional journals and periodicals
58190 : Other publishing activities

58210 : Publishing of computer games
58290 : Other software publishing
61100 : Wired telecommunications activities
61200 : Wireless telecommunications activities
61300 : Satellite telecommunications activities
61900 : Other telecommunications activities
62011 : Ready-made interactive leisure and entertainment software development
62012 : Business and domestic software development
62020 : Computer consultancy activities
62030 : Computer facilities management activities
62090 : Other information technology and computer service activities
63110 : Data processing, hosting and related activities
63120 : Web portals
64110 : Central banking
64191 : Banks
64192 : Building societies
64201 : Activities of agricultural holding companies
64202 : Activities of production holding companies
64203 : Activities of construction holding companies
64204 : Activities of distribution holding companies
64205 : Activities of financial services holding companies
64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c

64301 : Activities of investment trusts

64302 : Activities of unit trusts
64303 : Activities of venture and development capital companies
64304 : Activities of open-ended investment companies
64305 : Activities of property unit trusts
64306 : Activities of real estate investment trusts
64910 : Financial leasing
64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
64922 : Activities of mortgage finance companies
64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance
64991 : Security dealing on own account

64992 : Factoring
64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
65110 : Life insurance
65120 : Non-life insurance
65201 : Life reinsurance
65202 : Non-life reinsurance

65300 : Pension funding
66110 : Administration of financial markets
66120 : Security and commodity contracts brokerage
66190 : Other activities auxiliary to financial services, except insurance and pension funding
66210 : Risk and damage evaluation
66220 : Activities of insurance agents and brokers
66290 : Other activities auxiliary to insurance and pension funding
66300 : Fund management activities
69101 : Barristers at law
69102 : Solicitors
69109 : Activities of patent and copyright agents; other legal activities (other than those of b
69201 : Accounting, and auditing activities
69202 : Bookkeeping activities
69203 : Tax consultancy
70100 : Activities of head offices
70210 : Public relations and communication activities
70221 : Financial management
70229 : Management consultancy activities (other than financial management)
71111 : Architectural activities
71112 : Urban planning and landscape architectural activities
71121 : Engineering design activities for industrial process and production
71122 : Engineering related scientific and technical consulting activities

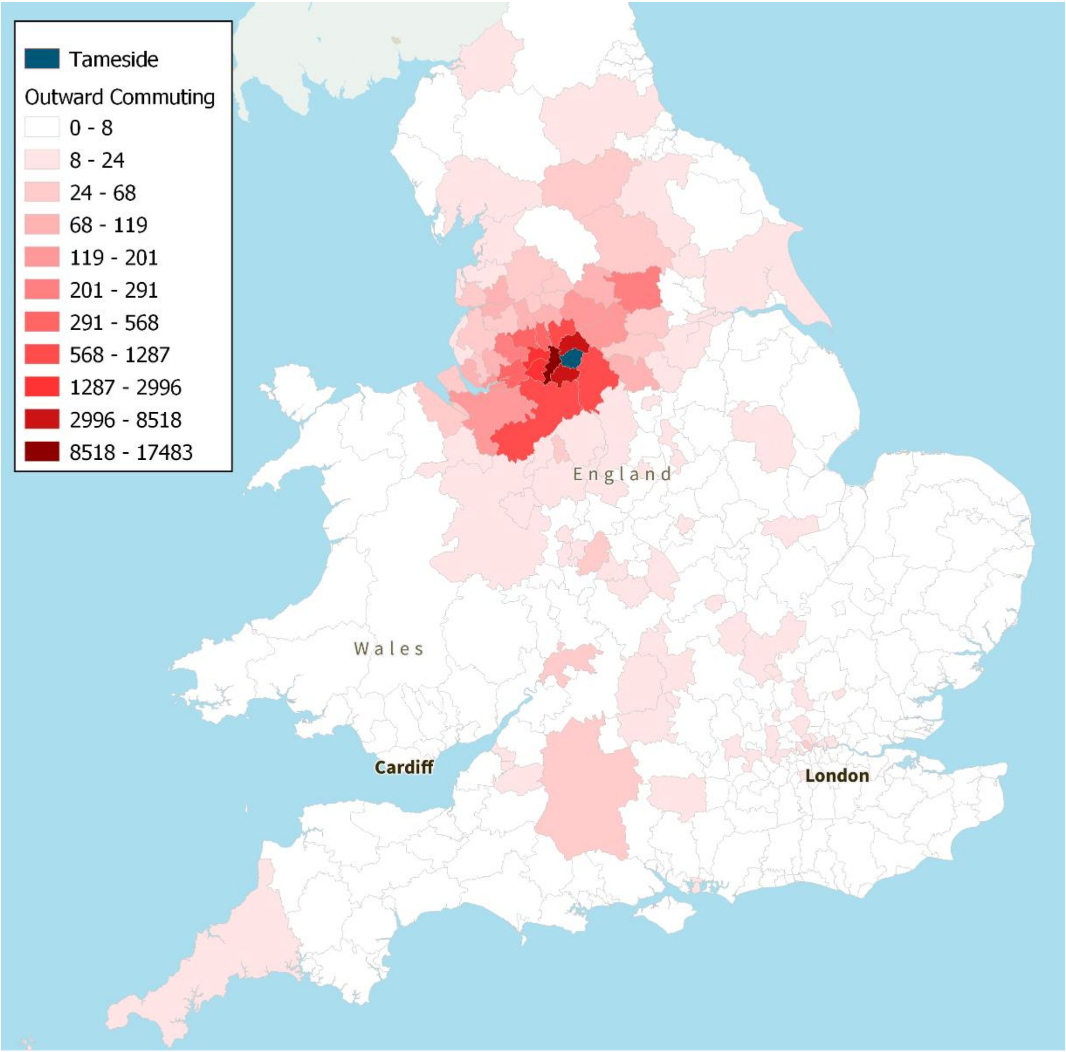
71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting
71200 : Technical testing and analysis
72110 : Research and experimental development on biotechnology
72190 : Other research and experimental development on natural sciences and
72200 : Research and experimental development on social sciences and humanities
73110 : Advertising agencies
73120 : Media representation
73200 : Market research and public opinion polling

74100 : Specialised design activities
74201 : Portrait photographic activities

74202 : Other specialist photography (not including portrait photography)

74203 : Film processing
74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec
74300 : Translation and interpretation activities
74901 : Environmental consulting activities
74902 : Quantity surveying activities
74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)
82110 : Combined office administrative service activities
82190 : Photocopying, document preparation and other specialised office support activities
82200 : Activities of call centres
82301 : Activities of exhibition and fair organizers
82302 : Activities of conference organizers
82911 : Activities of collection agencies
82912 : Activities of credit bureaus
82920 : Packaging activities
82990 : Other business support service activities nec
85410 : Post-secondary non-tertiary education
85421 : First-degree level higher education
85422 : Post-graduate level higher education
91011 : Library activities
91012 : Archive activities
91020 : Museum activities
91030 : Operation of historical sites and buildings and similar visitor attractions
91040 : Botanical and zoological gardens and nature reserve activities

Appendix B:
Where Tameside residents go to work outside the borough, 2011



Tameside Metropolitan Borough

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Appendix C: Glossary

Acronym	Definition
5G	Fifth generation wireless technology standard for cellular networks
AI	Artificial Intelligence - this refers to the simulation of human intelligence in machines to think and learn
AME	Advanced Manufacturing and Engineering
AMM	Advanced Manufacturing & Materials
ASHE	Annual Survey of Hours and Earnings
BDUK	Building Digital UK - a programme for delivering broadband networks to the UK
CO2	Carbon Dioxide
CCG	Clinical Commissioning Group
CNI	Cooperative Network Infrastructure
DfE	Department for Education
DMCT	Digital, Media, Creative and Tech
FDI	Foreign Direct Investment
FTE	Full Time Equivalent worker
GM	Greater Manchester
GMCA	Greater Manchester Combined Authority - this area covers the ten metropolitan boroughs within Greater Manchester.
GVA	Gross Value Added - the measure of the value of goods and services produced in an area, industry or sector of an economy
HEI	Higher Education Institution
HS2	High Speed Rail 2
ICT	Information Communication Technologies
LIS	Local Industrial Strategy
LQ	Location Quotient - a way of quantifying how concentrated a particular sector is in a region compared to the national average
LSOA	Lower Super Output Area - a statistical geographic region
NHS	National Health England
NPH	Northern Powerhouse
NVQ	National Vocational Qualification - an standard for assessing skills and knowledge. This is expressed as an equivalent measure across academic and vocational learning.
ONS	Office for National Statistics
PHE	Public Health England
R&D	Research & Development
STEM	Science, Technology, Engineering and Mathematics - a term used to group together these four disciplines
STP	Strategic Transport Plan
UK	United Kingdom
WAP	Working Age Population