

HARLOW REGENERATION STRATEGY

FINAL REPORT

July 2005

PACEC and Halcrow Group Limited

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PACEC

49-53 Regent Street, Cambridge, CB2 1AB
Tel +44 (0)1223 311649 Fax +44 (0)1223 362913
www.pacec.co.uk

Halcrow Group Limited

Endeavour House, Cygnet Park, Hampton, Peterborough, PE7 8FD
Tel +44 (0)1733 560033 Fax +44 (0)1733 427988
www.halcrow.com

PREFACE

The Regeneration Study has been undertaken by PACEC and Halcrow Group Limited, as one of a number of studies funded under the ODPM's Growth Areas Programme and commissioned by Harlow District Council. The main study outputs consist of two reports:-

- Harlow Regeneration Strategy
- Evidence Base and Analysis of Needs

The options and conclusions set out in the study are those of the consultants, and do not necessarily reflect the views of the Steering Group members. The reports are made available solely for information purposes and have the status of background technical documents.

The Steering Group, chaired by Harlow District Council, comprised: -

- Vernon Herbert (Programme Director, Harlow District Council)
- Paul Bird (Head of Regeneration, Harlow District Council)
- Joanna Beaumont (Regeneration Manager, Harlow District Council)
- Ian Christmas (Harlow District Council)
- Michael Hargreaves (Government Office for the East of England)
- Dearbhla Lawson (Government Office for the East of England)
- Jamie Merrick (East of England Development Agency)
- Peter Pearson (Essex County Council)
- Philipa Bull (Essex County Council)
- Jennifer Burns (Essex County Council)
- Henry Stamp (Epping Forest District Council)
- Alison Cowie (Harlow Primary Care Trust)
- Chris Hatton (Learning and Skills Council)
- Debbie Sheridan (Harlow College)
- Val Jepps (Harlow Centre for Voluntary Support)
- Robert Powell (Princess Alexandra Hospital Trust)
- Keith Hughes (Business Link for Essex)
- Rachael Donovan (Herts County Council)
- Steve Bailes (Herts County Council)
- Paul Pullin (East Herts District Council) Attended as an observer

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1 Introduction

1.1 Context

The former New Town of Harlow, designated in 1947, was originally built to accommodate the population overspill from London. As a first round New Town it was designed for a population of 60,000 people and, in accordance with the times, included limited provision for cars. Since then its resident population has grown to nearly 80,000 and the town has reached the position where much of its urban fabric and infrastructure has reached its capacity.

As a New Town, much of Harlow was built at the same time and hence has aged at the same rate. Given historic under investment, many elements are reaching the end of their lifetime simultaneously and there is a need for significant improvement across the town in the areas of housing, transport and social facilities, as well as town centre revitalisation.

Alongside gradual urban decay, Harlow has suffered a decline in economic fortunes and a rise in social exclusion and deprivation. Combined, these forces provide a potentially self-perpetuating downward trajectory for the future of Harlow and highlight the need for regeneration.

1.2 The Economic Potential

The current economic performance of Harlow is somewhat surprising when considered in the context of the undoubted economic potential of the town.

Locationally, Harlow is in a very strong position. It is on the edge of the Greater London conurbation, in close proximity to Stansted Airport and within commuting distance of the Cambridge hi-tech sub-region. This locational advantage has meant that, although it is facing some deep-rooted economic problems, Harlow has attracted a degree of inward investment.

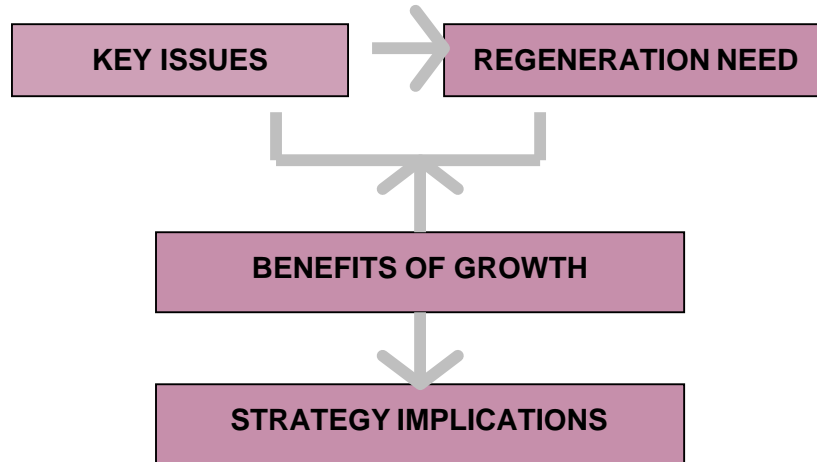
Equally Harlow has some major sectoral strengths and 'flagship' employers. Current industrial specialisms include research & development, pharmaceuticals, and the manufacture of electronic equipment, all of which are part of the growing knowledge economy. Companies represented include GlaxoSmithKline, Arrow Electronics, Nortel Networks and C-Mac. These specialisms provide opportunities upon which to build the Harlow economy that are currently not being exploited.

Furthermore, the inclusion of the town within the London-Stansted-Cambridge-Peterborough growth corridor provides the context and opportunity for change in Harlow.

1.3 The Harlow Regeneration Strategy

The Harlow Regeneration Strategy provides a framework for the economic and social growth of Harlow. It makes a clear link between the current needs of Harlow and the future growth of the town. In doing so, it provides a concise overview of the current issues facing Harlow; quantifies the regeneration needs of the town; and justifies why the growth of Harlow provides a unique opportunity to satisfy the pre-conditions for regeneration.

However, the strategy is clear that **whilst growth is necessary for the comprehensive regeneration of Harlow, it is not on its own sufficient guarantee that regeneration will occur.**



The strategy considers what level of growth is needed to address Harlow's regeneration needs through realising the town's economic potential. From this position a clear Strategy and Implementation Plan is presented setting out the necessary requirements and resources to support regeneration.

Co-ordinated action over a sustained period of time will be needed to ensure regeneration opportunities are created and realised.

2 The Underlying Issues

2.1 Overview

The potential of Harlow is outlined in section 1.2 above and the town clearly exhibits strengths upon which regeneration can be delivered. However, prevailing conditions currently inhibit the realisation of this potential and are combining to create difficult social and economic conditions in the town. The issues faced are complex and inter-related and need to be understood in order to determine the underlying causes and symptoms of the economic decline.

In broad terms, the town's economic performance is determined by the interaction of the economic demand, economic supply (including the labour market), the physical environment and accessibility. An analysis¹ of the components behind each of these factors has been undertaken to provide an evidence base and a clear perspective on the dynamics at work in Harlow¹. The fundamental issues facing Harlow are discussed below.

2.2 Underperforming Economy

On the surface, indicators seem to suggest positive economic performance in Harlow. Relatively high economic activity rates, low unemployment, employment growth, and modest levels of inward investment all point to

some economic success. At the same time, compared to much of Southern England, Harlow is characterised by a relatively stable economy with limited turbulence in the labour market or its business stock. Indeed the town has key strengths in terms of the representation of high profile R&D companies including GlaxoSmithKline and Nortel Networks.

However, closer analysis yields a picture of **relative economic stagnation** in Harlow in recent years. The town has suffered economic **restructuring** typified by significant decline in the manufacturing, transportation, storage and telecommunications sectors between 1998 and 2002. The result is that Harlow's economic performance has been poor compared to other towns and districts, with the town's competitive position worsening as it continues to be outperformed by neighbouring areas.

2.2.1 Slow employment growth

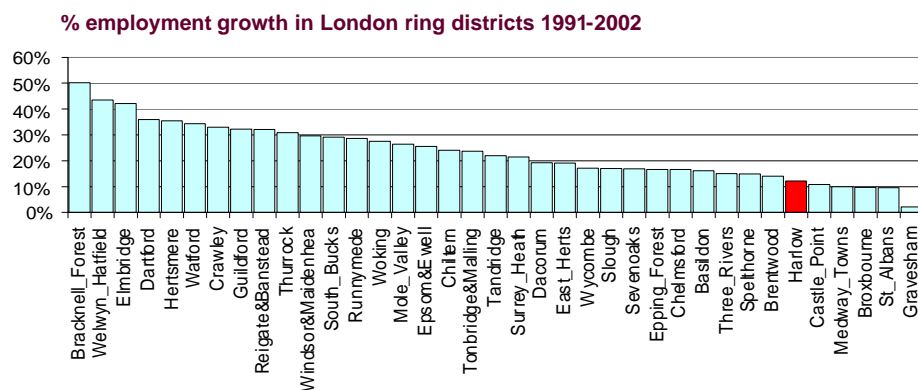
Employment growth in Harlow has been lagging behind its neighbours for some time. **Whereas employment grew steadily by 22% in the Harlow Sub-Region² between 1991 and 2002, the rate of growth in Harlow was only 12%.** In comparison to the other districts in the London Ring³, Harlow's rate of employment growth was in the bottom quartile over the same period, as shown in the figure overleaf. In relative terms, Harlow is not keeping pace with its competitors and is losing employment share.

¹ PACEC with Halcrow: 'Evidence Base and Analysis of Needs' 2005

²The economic and social analysis that underpins the strategy is presented using district and aggregated district data. This allows for a more comprehensive evidence base than a Travel to Work Area (TTWA) basis would allow

³ The 'Harlow Sub-Region' consists of adjacent District Councils: Broxbourne, East Hertfordshire, Epping Forest and Uttlesford

⁴ The 'London Ring' consists of some forty District Councils surrounding London



Source: PACEC, ONS, Annual Business Inquiry

2.2.2 *Limited business stock and SME development*

VAT registration data demonstrates that Harlow has a markedly small number of businesses relative to the town’s size, and that its business stock is considerably smaller than other benchmark areas. The town is not only significantly outperformed by the Harlow Sub-Region (which has more than double the number of VAT registered businesses per 1,000 economically active population than Harlow), but also by Essex & Herts and the East of England as a whole. Average employment per VAT registered business in Harlow, however, is much higher than elsewhere, reflecting the profile of larger businesses typical to the town.

VAT Registered Businesses per 1,000 Economically Active	
	Number
Harlow	38.4
Harlow Sub-Region	78.6
Harlow + Sub-Region	72.0
Herts & Essex	74.5
Eastern Region	65.3
Northern England	49.6
England and Wales	62.7
Southern New Towns	53.8

Source: PACEC, ONS VAT Register, Annual Business Inquiry, Labour Force Survey

The small firm sector is particularly underdeveloped and the town displays a disproportionately small share of employment in SMEs (53%) relative to the national average (62%). Furthermore, self employment rates in Harlow are also lower than other benchmark areas, with only 9% of the economically active residents in self employment - approximately half that of the surrounding Harlow Sub-Region Area (16.1%). Factors underlying the lack of SME development include the cost and limited availability of premises; the poor availability of skilled labour (especially in skilled trades); lack of supportive infrastructure and the absence of a strong enterprise culture in the town, slow growth of the market, and safety and security issues⁴.

The existing business structure implies that the town’s economy is fragile and reliant on a narrow business base that is dominated by a small number of larger companies.

⁴ PACEC Evidence Base and Analysis of Needs Report, July 2005

Self-Employment 2001/2 by Place of Work and Residence

	% of Workplace jobs	% of Economically Active Residents Self-Employed
Harlow	9.5	9.0
Harlow Sub-Region	16.9	16.1
Harlow + Sub-Region	15.5	14.9
Herts & Essex	14.3	13.7
Eastern Region	14.1	13.4
Northern England	9.7	10.4
England and Wales	12.2	12.4
Southern New Towns	10.9	10.1

Source: PACEC, ONS, Annual Business Inquiry, Labour Force Survey

Business Birth Rates

	% of Stock	Per 1,000 Economically Active
Harlow	12.7	4.9
Harlow Sub-Region	10.5	8.2
Harlow + Sub-Region	10.7	7.7
Herts & Essex	10.4	7.8
Eastern Region	9.7	6.4
Northern England	10.0	5.0
England and Wales	10.1	6.3
Southern New Towns	11.1	6.0

Source: PACEC, ONS VAT Register, Annual Business Inquiry, Labour Force Survey

2.2.3 Low levels of entrepreneurship

Relative to other benchmark areas, the rate of business formation in the town is slow at 4.9 per 1,000 economically active population. This rate is only 60% of that in the Harlow Sub-Region area and significantly below rates for the East of England. In terms of business survival rates, Harlow has a relatively small number of business closures per year. However, this is indicative of the town's dependence on large employers and low start up rate rather than a high rate of overall business success.

The data indicates a lack of dynamism and business growth in

Harlow. As new firms are a recognised component of a successful and dynamic economy, this poor performance is a key factor underpinning Harlow's low rate of employment growth.

2.2.4 Research & Development – unexploited strengths

As a business location, Harlow has a demonstrable appeal for the Research & Development sector, evidenced by the relative level of employment in this sector. Nationally this sector accounts for less than half a percent of employment, whereas in Harlow it accounts for nearly ten percent – the highest in the country. Furthermore, Harlow also has the second and fifth highest concentrations of employment in the country in the manufacture of computers and instruments respectively.

However, two points are worth noting. Firstly, R&D employment is reliant on a small number of flagship companies. This, in itself, creates economic fragility. Secondly, and linked to the above, is the fact that **Harlow is not exploiting the benefits of its potential clusters, and is fundamentally failing to generate genuine clusters** with spin out SMEs building on the current R&D base, or where other sectors feed off the business opportunities arising from the existence of the R&D core.

2.3 Labour Market Issues

Harlow is facing a number of related problems associated with its labour market offer, which reduce the attractiveness of the town as a business location and contribute to levels of social exclusion and deprivation among the local community.

2.3.1 Size of the labour market

With a population of 78,500 and an economically active population of 40,900, Harlow’s labour market is relatively small and has failed to keep pace with local labour requirements. Indeed, long run population trends indicate that **Harlow’s population has experienced overall decline since 1981, while the population of the surrounding area has increased by more than 10%**. Much of this has been due to out-migration, particularly of the younger and more affluent residents. The decline in population coupled with steady growth in employment has meant that Harlow has increasingly been reliant on imported labour from a wider catchment area.

Long Run Population and Employment Trends

	Population (000's)		Employment (000's)	
	Harlow	Harlow Sub-Region	Harlow	Harlow Sub-Region
1981	79.6	369.0	40.7	141.1
1991	74.6	378.0	39.6	159.4
2002	78.5	408.2	44.4	194.7

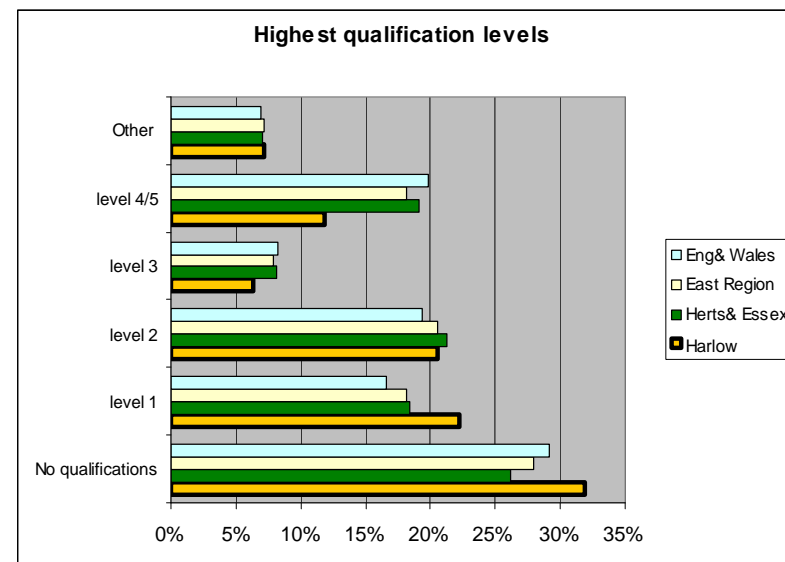
Source: PACEC, Office for National Statistics Mid-year Population Estimates, Annual Business Inquiry, Labour Force Survey

2.3.2 Skills and education

The labour pool is also relatively low skilled, with a higher proportion of residents with no qualifications, and a significantly lower proportion of the workforce with higher qualifications in Harlow than in comparator areas. The town is characterised by a poor skills retention rate with

graduates/qualified people tending to leave Harlow, and people with high qualifications attracted to work in Harlow are more likely to live in towns and villages in the neighbouring travel to work areas which offer a better quality of life.

Qualification levels



Source: PACEC, ONS (Census of Population 2001).

In particular, **basic skills in Harlow are among the lowest in the region**. An estimated one in four people have problems with basic literacy and numeracy, and despite significant efforts through the Basic Skills Strategy there remains a large proportion of the adult population that still require support.

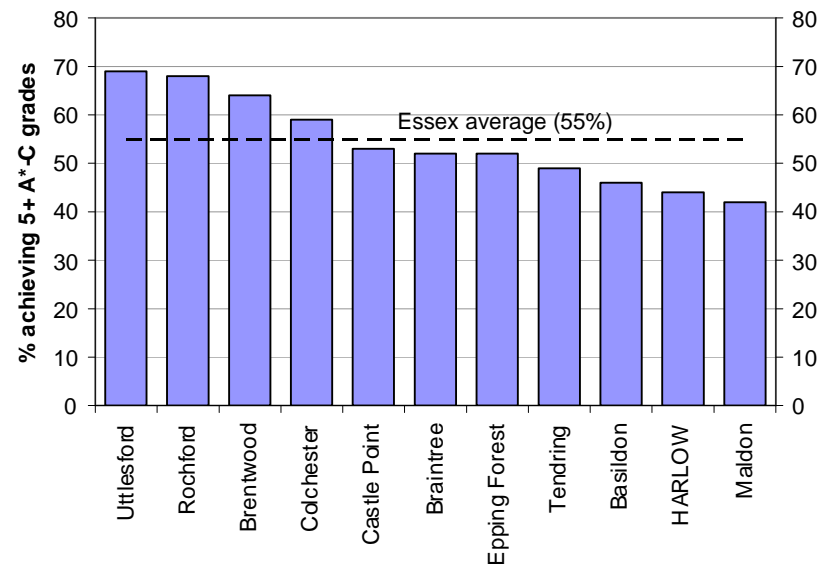
Adult Literacy and Numeracy, 2001

	Total poor literacy		Total poor numeracy	
	No	%	No	%
Harlow	12,360	28.1	13,399	30.5
Essex	210,883	22.1	207,062	21.7

Source: Basic Skills Agency, 2001

Underpinning the skill levels in Harlow is the fact that **fewer residents are likely to participate in learning than in other parts of the county**. Most noticeable is the extremely low participation rate (31%) for 16-17 yr olds in full time education (Census 2001). Harlow has the second lowest proportion of pupils achieving 5+ A*-C grades (Key Stage 4) GCSE/GNVQ qualifications among Essex local authorities, indicating low attainment and aspirations.

Percentage of pupils achieving 5+ A*-C grades at Key Stage 4 (GCSE/GNVQ) in Essex local authorities, 2003



Source: ONS

Although GCSE attainment figures in Harlow have been improving at a faster rate over the period 2000 to 2003 compared to the past, and the gap between Harlow and Essex/UK has narrowed, they are still nevertheless considerably lower than the Essex and UK averages. Provisional data for 2004 also shows tht Harlow now has the lowest attainment rate of all Essex Districts.

These weaknesses in skills and education impinge on employability and undermine the potential of the indigenous population to generate a faster growing SME base (the recognised engine of a dynamic economy).

2.4 Economic Imbalance

Consideration of Harlow’s employment structure and labour market clearly demonstrates a high level of economic imbalance in the town. **The extent to which the town operates as a sustainable labour market has been undermined over time** with the result that only an estimated 52% of jobs in the town are filled by Harlow residents and 48% by in-commuters (increased from 37% in 1991).

There also is a disparity between the resident population and the occupational composition of workplace jobs in Harlow. For example, for all levels of qualification up to and including Level 3, there is a job shortage in the town of around 5,300 people. At the same time, there are 9,300 positions in Harlow requiring Level 4/5 with only 5,600 residents qualified to this level.

Employment and Residents by Qualification (000’s)

	Harlow		
	Economically Active Residents	Employment	Gap
Level 0	12.0	10.1	-1.9
Level 1	10.6	8.7	-1.9
Level 2	9.8	8.4	-1.4
Level 3	3.0	2.9	-0.1
Level 4/5	5.6	9.3	3.7
Total	39.3	40.9	1.6

Source: PACEC, ONS, Census 2001.

The skills and employment mismatch has an inhibiting effect on local business creation and the potential for spin-off activity relating to the R&D base. Given that workers with higher level qualifications are generally more predisposed to starting their own small businesses, and generally live outside Harlow, it is most likely that start-up activity would also locate outside of the town. Furthermore, the higher average earnings on offer in Harlow belie the fact that residents take home relatively poor earnings when compared to neighbouring areas.

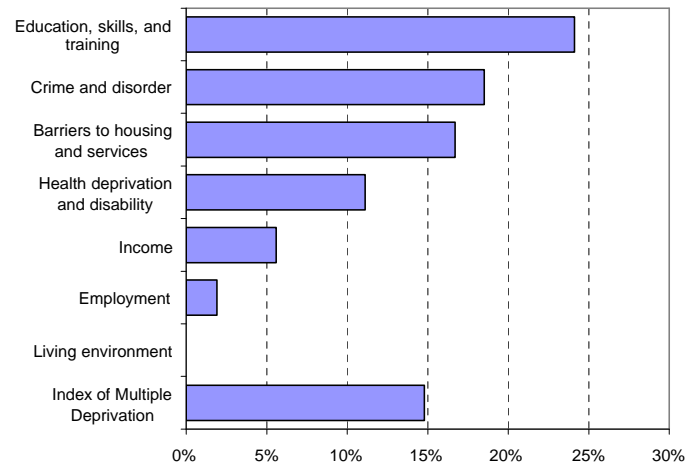
2.5 Social Exclusion and Deprivation

As outlined above, the interplay of the range of factors including low educational attainment and low earnings underpin social exclusion and deprivation in Harlow. Social indicators show that the residents of Harlow are typically worse off than their neighbours in terms of wealth and health. The social characteristics of Harlow residents can be summarized as follows:

- Relatively poor qualifications compared to residents in the London Ring and Harlow Sub-Region.
- Poor health relative to those in the surrounding regions but still good when compared to the country as a whole.
- High density living arrangements and more likely to be living with dependent children and/or without a partner.
- More likely to be living in local authority owned/rented accommodation.

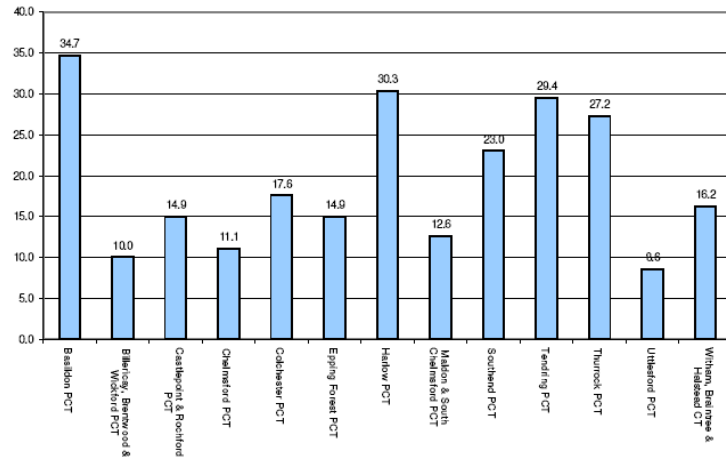
The fact that Harlow PCT has the second highest level of deprivation amongst PCTs within the Essex Strategic Health Authority area (see table below) demonstrates the close link between health and deprivation in the town.

Components of the Index of Multiple Deprivation, 2004 - percentage of Harlow SOAs within the most deprived 10% in the Eastern Region



Source: IMD 2004, PACEC

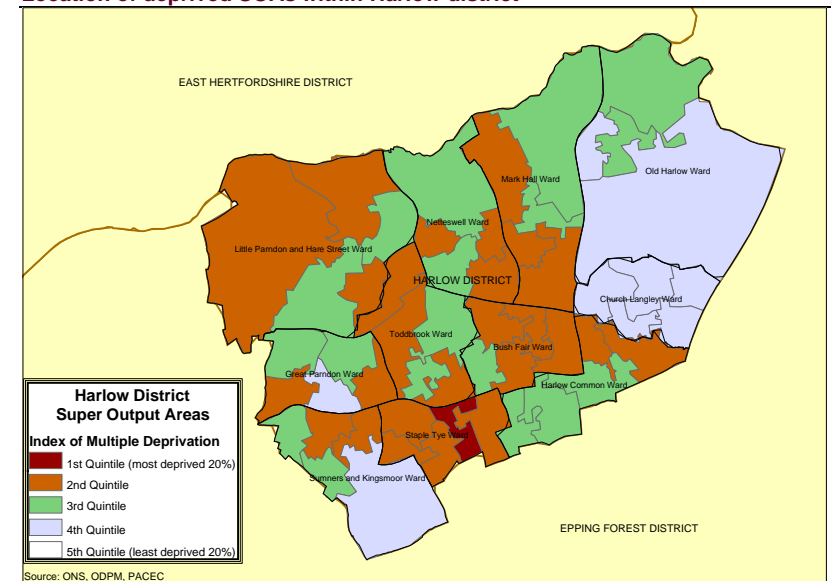
Index of Multiple Deprivation by Primary Care Organisation 2001



Source: Essex Strategic Health Authority Local Delivery Plan 2004

While the Index of Multiple Deprivation 2004 indicates that Harlow has moved out of the 20% most deprived wards in the country, the town retains high levels of income and employment deprivation, reflecting continued economic underperformance. **It remains within the most deprived 10% of local authorities in the East of England region and exhibits significant concentrations of deprivation, particularly in the Staple Tye ward** (which has a high concentration of Super Output Areas (SOAs) within the 20% most deprived in the country).

Location of deprived SOAs within Harlow district



Source: ONS, ODPM, PACEC
Source: PACEC, IMD 2004,

Social exclusion tends to be reinforced by the physical environment in the town, not only in terms of problems associated with the maintenance of the public housing stock, but also in respect of the layout of the road network and housing estates which contribute to a lack of physical integration

between residential areas. This, in turn, results in the segregation of communities, contributing to a sense of social isolation and insularity within local neighbourhoods.

2.6 *Poor Physical Infrastructure*

Harlow's economic potential is undermined by its decaying urban fabric, which has suffered from under investment over the recent past. The extent of Harlow's physical liabilities is explored below and recognises the increasing obsolescence of the infrastructure, identifies an infrastructure deficit, all of which underlines the need for direct intervention by the public sector to facilitate change.

2.6.1 *Unattractive employment sites and premises*

The Local Plan identifies a significant stock of vacant/under-utilised employment sites and premises in Harlow. **However, with the exception of Harlow Business Park (12ha), the existing stock is both outworn and constrained in terms of size and availability.**

Poor accessibility is a major inhibiting factor for the existing major employment sites. These are poorly located relative to the strategic transport network, requiring access via Harlow's congested road network, and as such are unattractive to potential inward investors.

Older industrial and office stock is increasingly becoming redundant. Industrial and commercial rents in Harlow are among the lowest in the London Ring, with market conditions preventing reinvestment. The market on its own is thus not able to provide the space required by companies (for example, follow-on space that business start-ups require).

As a consequence of this market failure, many employment sites are subject to pressure for redevelopment, for example as retail warehousing, thereby further reducing their employment potential and increasingly undermining Harlow's attractiveness as an investment location.



2.6.2 *A poor and ageing housing stock*

Harlow's housing market is characterised by an ageing stock, a continuing high proportion of council ownership (over 30% in Harlow compared to around 15% in Essex); and increasingly onerous maintenance requirements of existing public and private owned dwellings. Fragmented ownership is a key feature of many estates that were constructed using 'non-traditional' methods and which were designed for single ownership and management.

Many estates are now a mix of tenures and ownerships, and are becoming increasingly difficult to manage and maintain.

While there is clearly buoyancy in the housing market (evidenced through increasing house prices and pressure for the redevelopment of employment sites), the limited diversity and choice of housing makes Harlow a less attractive residential location than its geographic position presents, particularly for higher end occupations. Indeed, there has been limited residential development over the last ten to fifteen years with the exception of the Church Langley development and more recently the New Hall area.

Overall, the stock of housing in Harlow lacks choice, is largely unattractive and, in parts, is approaching the end of its liveability.

There is a clear need for housing renewal in many areas, particularly in light of the requirement to meet decent homes standards by 2010. Certain neighbourhoods have declined at a faster rate than others owing to the nature of design and construction of the era in which they were built. (For example areas built in the late sixties and early seventies, such as The Briars and Northbrooks have proved less durable than other areas).

In terms of affordable housing, Harlow faces not only a shortfall of affordable homes (projected as a shortfall of 987 homes over the next six years⁵), but also has an increasingly 'residual' stock of affordable housing in council ownership. The residualisation of the public stock has occurred through the transfer of social housing to the private sector and means

that while Harlow Council still owns over 30% of total stock in the town, their holdings tend to be the poorest stock with high maintenance costs.

The council's planned budget for maintenance and improvement of the existing stock is estimated at £370 million for the period 2003-2033 and it is estimated that £47 million is needed to bring the council owned stock up to a decent standard. In addition, the housing stock survey identified that the private stock is deteriorating and that £36 million is needed to bring this up to a decent standard⁶.



2.6.3 *Decaying town and neighbourhood centres*

The town centre is critical to the economic future of Harlow. Not only does it provide significant employment opportunities for Harlow residents (currently it accounts of one-fifth of employment in Harlow), but also underpins image and perceptions of the town.

⁵ Harlow's Housing Strategy 2004-2007

⁶ House of Commons: The New Towns: Their Problems and Future, 19th Report of Sessions 2001-02

Harlow's town centre has been in decline for some years. It has fallen from 78 to 130 in the national hierarchy in the past twenty years (Stevenage is ranked 103rd and Chelmsford 43rd). This has occurred as a result of retail competition from new centres, the declining role of the town centre as an employment location, and through the gradual erosion of the town centre offer and physical environment. The result is an increasing likelihood that residents in the catchment area will prefer to travel to competing town centres, including Cambridge and Chelmsford.

The need for town centre improvement is well recognised and a renewal programme is currently underway. The recently completed £55 million Town Centre South development that will provide 21,739 sqm of retail space alongside the new Civic Centre, and plans for the rest of the Town Centre are emerging through the Town Centre North Framework which is building expectations of a 'step-change' in town centre provision. However, this investment will require a necessary level of catchment spend capacity if it is to proceed.



The Neighbourhood Centres and Hatches also play a key role in the functioning of Harlow. **These centres fulfil an important social need, providing a focus for neighbourhood and local services, but many of them are in decline and current viability is questionable as they**

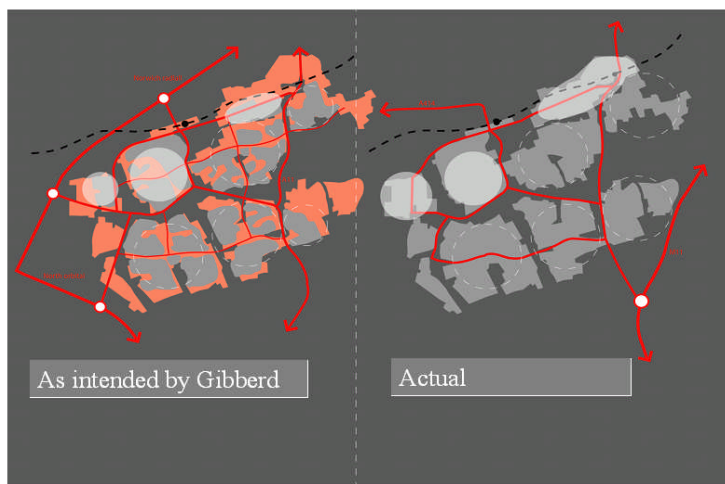
approach the end of their lifetime. While in need of significant renewal to accommodate community needs and to address inherent design issues that tend to reinforce anti-social behaviour, these centres remain an important opportunity to ensure a mix of uses in otherwise mono-functional residential neighbourhoods.

2.7 *Poor Accessibility to and within Harlow*

While Harlow is well located in terms of proximity to Stansted and the M11, the **current strategic transport linkages are currently inadequate and compromise the original vision for transport and connectivity envisaged by Gibberd.** For example:

- Gibberd's vision for strategic road connections to Harlow has never been realised. The proposal for the Northern Radial Road, which was to skirt Harlow on the west, has never been implemented even though Gibberd stated explicitly that without this route the town plan cannot function properly.
- The plan for internal traffic circulation has been compromised by the lack of links from the south and the west (the result being that the westerly and northerly employment sites are not directly connected to the motorway network).
- The planned district road hierarchy has been compromised through the upgrade of routes, resulting in a lack of clarity and increasing the reliance of the private vehicle over other transport modes.
- At the same time, the ring road surrounding the town centre currently acts as a barrier to accessibility. Highway 'upgrading' has resulted in the severance of the town centre from its hinterland.

Movement & Access



Source: Harlow Town Masterplan, 1947

Clearly the town was not designed to accommodate current levels of traffic and the consequence is poor accessibility and severe traffic congestion during peak hours. For example, Junction 7 of the M11 is currently operating at 120% of planned capacity with severe delays during peak periods in both directions. Moreover, the nature of the sub-regional road infrastructure is such that the traffic accessing the M11 from the north and west is required to pass directly through Harlow, placing considerable burden on the local road network.

2.7.1 *The current deficit in transport infrastructure provision*

Harlow's current deficit in transport infrastructure provision results in high levels of dependence on the private car (combined with low levels of car ownership) and a poorly developed public transport network in the town (which itself is aggravated by generally low densities, and congestion on

local roads). Measures required to address the current deficit in transport infrastructure provision are considered to include:

- Improved public transport provision to bring about a fundamental modal shift, including the provision of a high quality north-south public transport spine consisting of at least a fully prioritised, high frequency guided bus scheme with associated park and ride facilities (indicative estimate = £114-164 million)⁷
- Demand management measures (such as parking management) and behavioural change initiatives to support modal shift (estimate = £5 million)⁸
- Improved cycle and pedestrian networks, including the completion of discontinuous routes and cycle parking facilities (estimate = £15 million)⁸
- The provision of a new link road to connect the A414 and M11 north of Harlow (indicative estimate = £138-199 million)⁷
- M11 Junction 7 improvements (estimate = £10 – 14 million)
- New Pinnacles Link Road to alleviate congestion on 5th Avenue and provide access to the largest business area (estimate = £15 million)⁸

2.8 ***Harlow's Negative Image***

A persistent message throughout the analysis is the very poor image of the town and negative perceptions of Harlow as a location for business and living, particularly to outsiders. Although Harlow has been successful in attracting a share of inward investment in the East of England, the negative perceptions of the town as an investment location are related to the inadequacy of the road network and transport infrastructure set against modern requirements, congestion, outworn industrial estates, poor quality

⁷ MVA Harlow Growth Options Transportation study 2004

⁸ Infrastructure cost estimates from Harlow Masterplan study, Halcrow 2004

housing, relatively high levels of welfare dependency and the town's outdated design.

PACEC's survey of Harlow employers indicates that not only was **poor local image considered to be a hindrance to business growth in Harlow, it was also the most important factor in attracting and retaining businesses**⁹. Almost 50% of businesses surveyed identified improved image and marketing of Harlow as important in attracting businesses, a proportion that increased among firms in the manufacturing, business services, education and health sectors. Lack of investment, in turn, further undermines the town's image and contributes to its negative reputation, poor quality town centre, congestion and perceptions of high crime and poor personal safety.

Consultation indicates that potential investors and employers feel that the town has a limited offer, with jobs being advertised on the basis of Harlow being close to London and Cambridge, rather than on the basis of the town's intrinsic qualities or attractions. In particular, the image of Harlow as a failing New Town detracts from its ability to attract investment. Clearly, re-branding and the revitalisation of Harlow's image and identity will be key if the town is to attract significant investment in the future.

⁹ PACEC. Survey of Firms (2004)

3 A Successful Economy?

3.1 Introduction

The preceding analysis highlights the scale of the economic challenge facing Harlow and the fact that the town stands out as underperforming relative to the surrounding area. **The nature of the problems and the scale of investment deficit faced in Harlow means that a comprehensive approach is required to move the town forward and achieve a step change in economic prospects.** To put these in some perspective, consideration is given below to the factors that underpin and influence the success of large towns and cities.

3.2 What makes for a Successful Urban area?

Current policy, through the Urban White Paper and Sustainable Communities Plan, concentrates future growth in population and employment on existing urban areas and has given rise to a significant amount of research on the role of urban concentrations in economic development. A review of this research¹⁰ leads to the identification of a number of key generic ingredients required for the economic success of large urban areas (be it towns or cities).

- Firstly, there is a strong relationship between the capacity to attract and retain a more skilled and highly qualified labour force and economic

success. Here the quality of life, the local environment and capacity of an area to generate skills and human capital are crucial factors..

- Secondly, research demonstrates the crucial relationship between the concentration of knowledge-based industries and success. An important factor underlying this success is the networking and cohesion of SMEs.
- Thirdly, urban concentrations that have a diverse industrial base tend to be more successful and responsive to economic and technological changes.
- Fourthly, there is evidence in support of a relationship between the capacity to offer a high quality of life and good environment, and economic success. Factors here include the architectural and housing quality, access to cultural facilities, high quality educational, health and welfare amenities, shopping, and recreational facilities.
- Fifthly, the more successful urban areas have relatively good connectivity through physical and electronic infrastructure and are able to move people, goods and information quickly and efficiently. Crucially important is easy access to air transport and the extent of international connectivity.
- Finally, there is an emerging view that many aspects of strategy, planning, government delivery and service provision need to coordinate at the city-region or sub-regional level to be effective in enhancing success.

Additional research specific to UK cities identified eight factors that potentially combine to provide the criteria for successful in the UK¹¹. These factors correlate strongly with those above but also include location and investment status as key factors. Harlow is assessed against these factors overleaf.

¹⁰ Key studies include: 'Competitive European Cities: Where do the Core Cities Stand?'- ODPM 2004; and the ESRC 'Cities: competitiveness and cohesion research programme' 2004

¹¹ DETR: "The State of English Cities" November 2000

Success Factors ¹²	The Position of Harlow
<p>Location. Places close to London and in ‘the South’ have been able to capitalise on growth pressures linked to access to European markets. In part, this has been encouraged by the patterns of national investment of such assets as scientific institutes, which reflect a high degree of centralisation.</p>	<p>Harlow has a significant locational advantage, with close proximity to the Greater London conurbation, Stansted Airport and more widely the Cambridge sub-region. However, the town’s current economic performance clearly reflects that its locational advantages are suppressed by issues of accessibility and quality of life. Harlow’s locational advantage provides huge economic potential. A key example is that despite proximity to Stansted, Harlow only accounts for 6% of employment at the airport.</p>
<p>Age. Places with older stocks of inherited investment (for example, older housing and utilities) have done less well than those with newer infrastructure. This, however, has been over- ridden where older stock has some potential as a ‘heritage’ attraction for tourism or for high-quality residential investment.</p>	<p>Despite seeing relatively recent high levels of investment in infrastructure and physical product, the nature of that investment has left a legacy else where in the town of a decaying urban fabric and increasingly redundant infrastructure. Identified investment deficits mean that significant investment is required just to maintain current economic position.</p>
<p>Favourable economic structure. Places endowed with businesses in sectors that are buoyant in terms of turnover, profits, R&D and employment tend also to grow overall. Certain sectors have a generalised dynamic effect on the urban economy. Examples include professional services such as legal, accountancy, insurance, and financial services.</p>	<p>Harlow’s representation of growth sectors such as R&D, pharmaceuticals, electronics means that it has clear economic strengths upon which it can build. However, the economy fails to do this and much of the value of these sectors drains out of the town. In addition the economic base is too narrow and reliant on a small number of large companies.</p>
<p>Company characteristics. Places with dynamic companies, selling in growing markets and with strong growth potential, will tend to grow more quickly - company characteristics are clearly a key factor over and above the effects of industrial structure.</p>	<p>While Harlow is home to world-renowned large companies such as GlaxoSmithKline and Nortel Networks, its lack of SME base means that the economy is neither dynamic nor diversified. The current economy is inflexible and cannot react to change at the macro level.</p>
<p>Skills, learning and innovation. Places with high levels of formally qualified population (measured in terms of formal educational qualifications) have been at an advantage in comparison to those whose labour force has on-the-job experience.</p>	<p>Harlow’s workforce currently lacks skills at the most basic level and at the higher occupational end. The current workforce represents a significant constraint on the economy, levels of investment and social inclusion and is a root cause of the underperformance of the economy.</p>
<p>Communications. Places with good road, rail and air communications have benefited. Internationally well-connected airports have played a key role in this.</p>	<p>Harlow has strong potential, located in close proximity to the strategic road network and an expanding international airport. The main issue is that these locational advantages are constrained by poor connectivity to this network.</p>
<p>Quality environments and services. High quality local environments and services provide a favourable context for business activity and are attractive to skilled, managerial and professional labour. The stock of property, both business and residential, is important; as are factors such as the crime rate, school performance and civic amenities.</p>	<p>The quality of the physical infrastructure in Harlow is poor. The housing stock is largely unattractive and limited in choice; the town centre and neighbourhood centres are in continued need of investment and re-branding; cultural and leisure facilities are in need of improvement, and the stock of business sites and premises is of relatively poor quality.</p>
<p>Effective local governance. The responsiveness and innovativeness of local authorities – other things being equal - has been an important element influencing their ability not only to attract streams of public resource, but also private investment.</p>	<p>The future governance of Harlow will be important in achieving regeneration in a holistic and wholesale manner. Currently local priorities are focused on improving the capacity and overall performance of the council following a poor comprehensive performance assessment and there are differing views between Harlow and neighbouring authorities on the growth agenda and how and where it might be accommodated.</p>

¹² Success factors sourced from DETR: “The State of English Cities” November 2000

What is demonstrated above is the fact the Harlow undoubtedly has a number of strengths, which are characteristic of successful urban conurbations. Because of a range of factors, however, it is unable currently to exploit the potential inherent in these strengths. Also demonstrated is the fact that **Harlow is weak in terms of a number of the building blocks that underpin success (economic diversity, SME base, skills) and that, without these, the town is likely to persistently under perform in economic terms.**

3.3 *The Role of Urban Capacity and Hierarchy*

Research also concludes that the size of an urban area is important because it creates the capacity for investment in terms of hard and soft infrastructure, and improves the potential for economic growth (empirical data emphasises that there are potentially both economic and social benefits to be exploited from increased size of population and the rate of growth).

PACEC tested this relationship through the analysis of 24 urban concentrations located in the hinterland of London. All locations were at a similar distance from the capital and are well connected in terms of the motorway and trunk road network¹³. **The analysis demonstrates a positive relationship between the size / growth of urban areas and the indicators of economic success**, such as GVA per job, workforce development, industrial diversity, and average weekly earnings. Towns and cities with larger populations enjoy a greater propensity towards economic success, as do areas displaying faster population growth rates. In essence,

urban capacity and dynamism are important components in economic success.

A point to emphasise with regard to scale and growth is that, in relative terms, Harlow is decreasing in scale compared to competing towns. The impact of this is that its position in the regional hierarchy of urban centres is threatened, which also undermines its potential as an investment location.

Growth will give Harlow the potential to re-establish its position in the regional hierarchy.

3.4 *Conclusions for Harlow*

Clearly the combination of a range of factors determine the economic success, or otherwise, of locations. Consideration of Harlow's current position alongside these factors identifies some key building blocks for the future, based upon the potential the town exhibits. In order to move forward however, the town will need to overcome some serious economic and infrastructure weaknesses that currently constrain opportunity and economic growth.

What is also important to economic success is the size and dynamism (in terms of growth rates) of the economy. Both provide the capacity and environment to stimulate investment and entrepreneurial culture that will be important in creating a successful future for Harlow. This could be important to Harlow given the likely levels of investment required to fundamentally regenerate the town. In this respect, the **inclusion of the town within the London-Stansted-Cambridge-Peterborough growth corridor provides a positive context and opportunity for change in Harlow.**

¹³ See PACEC Technical Paper: 'City Size, Growth and Benefits to Residents and Firms in Harlow' 2005

4 Harlow's Regeneration Needs

4.1 Overview

Far reaching, decisive intervention is required to address the deep rooted structural problems facing Harlow and to realise the town's inherent potential. An incremental approach, focusing on only some of the issues identified, is unlikely to be sufficient to comprehensively address the causes for the town's under-performance. A wholesale regeneration initiative is required which comprehensively tackles the causes and implications of the town's current underperformance.

4.2 Harlow's Regeneration Needs

The fundamental requirement for regeneration is a successful and sustainable economy in Harlow. The analysis of the town's current problems provides a clear indication that one of preconditions for regeneration will be to address the 'causes' underpinning economic underperformance. The Regeneration Needs are all inter-related and presented as follows.

Need 1. Building a Dynamic Economic Base

The relative stagnation of Harlow's economy results from the structural difficulties it is currently facing. While there are obvious sectoral strengths within Harlow, overall employment growth is faltering, a number of key employment sectors are declining, and the town exhibits an over-reliance on a small number of large employers. The low business stock and lack of a vibrant SME sector undermine economic dynamism and constrain growth.

Creating a more **dynamic economic base** is fundamental to generating economic activity and opportunity for future Harlow residents, and to improving income, reducing deprivation and social exclusion. A broader economic and business base is needed not only to reduce reliance on a

small number of large firms but also to support a **flourishing SME sector**, where the greatest potential for future employment creation is likely to be seen.

A more dynamic base would contribute to **improved integration between the employment base and local skills**. This is also necessary to improve Harlow's competitive position vis-à-vis competing areas, and to help attract investment back into the town, thereby regaining some of its competitive advantage.

The provision of improved opportunity and support for the SME sector is thus a vital element of future regeneration in Harlow. However, at present, it is recognised that the current population constrains the supply of potential or 'would be' entrepreneurs, and that the town is not sufficiently large to support the growth of wider and more specialist service sectors - indeed there are more SMEs in the surrounding areas than in Harlow itself. Increasing the market size will be key to achieving the necessary critical mass required to generate and support SMEs.

Need 2. A Skilled and Innovative Workforce

The skills and aspirations of the workforce are important to economic prosperity on a number of levels, not least the attractiveness of an area to inward investment. Therefore, improving the labour market offer within Harlow will be critical to achieving comprehensive regeneration and raising the economic prosperity of the town. Three key components are central to achieving this:

- Improvement within the **existing labour market** in terms of raising skill and aspiration levels and integrating the resident population in to the economy is clearly important in addressing economic prosperity and social exclusion.
- Associated with the above is the **retention of skills** that are gained by Harlow residents. A critical aspect to this will be to stop the drift out by younger population through generating sufficient local opportunities, as well as offering improved quality of life locally.
- The **scale and nature of inward migration**, which can be used to change the economic and social base of the resident population and promote aspirations within the town as a whole, is also critical. By attracting a more diverse population mix that includes higher skills and professionals, more income is potentially retained in Harlow and the opportunity for improved entrepreneurial activity would be enhanced.

A skilled and innovative workforce underpins a number of economic benefits to Harlow. Improved skills will help reduce the current imbalance between labour demand and supply, contribute to the retention of higher incomes within Harlow, reduce social exclusion, support greater entrepreneurship, and raise overall economic prosperity.

Need 3. A 'Step Change' in the Physical Environment

One of the pre-conditions for renewal in Harlow is a step change in the physical structure of the town. The town's current infrastructure (across transport, employment land & premises, housing stock and social infrastructure) is poor, outdated and has suffered from lack of sustained investment.

Static population growth and relatively slow employment growth has been insufficient to support sustained economic progress and private sector investment. As a consequence the town is in '**investment deficit**' with significant areas in simultaneous decline. Much of the reason for this is owing to the fact that Harlow has outgrown its infrastructure (parts of which were never completed according to the requirements of the original plan), but has yet to achieve the critical mass required to generate the necessary private sector investment in renewal and capacity improvements.

Furthermore, the declining urban fabric of the town contributes to **Harlow's negative image**. A fundamental change in the physical environment of the town with selective renewal is required to reverse this image and open up the town to private investment. A flagship project within this will be the **continued renewal and regeneration of the town centre** as a symbol and gateway of the town.

Improvement in the quality of and choice in the **housing stock** will also be a critical catalyst in the regeneration process. The current quality of the housing stock fundamentally undermines the attractiveness of the town to professional and skilled workers, while at the same time the provision of affordable housing remains an issue. Large scale renewal will thus need to occur alongside affordable housing provision, and will need to be holistic and integrated with the aim of addressing the living environment in its entirety. Piecemeal approaches are unlikely to be successful in tackling the deep rooted problems associated with decay and poor housing quality.

A step change will require significant public/private investment through a partnership approach and necessary streamlined delivery processes to enact timely change.

Need 4. Social Inclusion for All

Harlow has benefited from successful well managed SRB programmes but still faces significant problems associated with deprivation and social exclusion. The future of Harlow must be developed on an **inclusive basis** so that all residents are able to share in the economic prosperity and opportunity created. Continued or further exclusion of sections of the resident population will undermine economic and social cohesion in the town.

Tackling many of the other regeneration needs of Harlow will help provide the conditions required to help bring residents back in to the economy. But continued community level investment in capacity building, intermediate labour markets, skills and community facilities will need to be provided to ensure macro improvements meet bottom-up improvements.

Need 5. The Re-branding of Harlow

Private sector investment in Harlow has lagged behind other areas for some time. As a consequence, much of the town is in a poor physical condition. This in turn contributes to the reluctance of the private sector to invest. A **fundamental change** in the image of the place is required to generate private sector confidence, raise aspirations for the town and stimulate investment. Key to this will be initiatives, which demonstrate that Harlow is undergoing fundamental change.

A starting point for this is to demonstrate change through high profile 'Flagship Projects' including major housing renewal scheme; town centre regeneration and marketing initiatives; as well as significant infrastructure improvements. Also critical will be governance and the creation of a high profile delivery vehicle capable of driving regeneration, creating market confidence and demonstrating effective delivery.

In addition, there is a need to **create housing choice** and establish new demand within existing areas in order to raise and spread liveability profiles within Harlow. This can only be achieved through partnership between the Council and the private sector, with a determined aspiration from both parties to improve Harlow as an attractive living environment.

Part of the positive image needs to relate to the positioning of the town within its hinterland, rebuilding and re-branding towards the **sub-regional role** originally envisaged for Harlow. As a sub-regional centre, Harlow would attract activity and investment associated with the role.

Need 6. Creating Critical Mass for Investment

Harlow's infrastructure is outdated, and in many cases its capacity has long since been exceeded. As a 'small town', Harlow is unlikely to attract the sizeable investment needed for substantial regeneration. Its capacity in employment and population terms is currently too small to help re-position the town centre in the retail hierarchy, or to justify necessary transport infrastructure investment.

The analysis of Harlow's current situation highlights the level of investment deficit that includes over £300 million for transport infrastructure, a backlog of over £80 million in housing stock repairs, and the need for continued investment in the town centre. If current trends continue it is likely to be many years, if ever, before the thresholds for such investment are reached through natural growth. Future expansion and population growth is essential to the transformation of the town into a modern sub-regional centre. Growth will contribute to the necessary increased **capacity in spend, population and labour market** terms to support employment growth as well as other needs.

Potential benefits arising from an increase in population relate to increased demand and access to a larger workforce. In particular, there is an opportunity to substantially change the structure of the resident population through large scale growth, thereby **increasing the economic potential** of the area, especially as in-migrants are generally considered more likely to demonstrate the necessary entrepreneurial characteristics and skills required to support a thriving SME-based economy.

Equally, a larger scale of growth will generate the necessary investment by raising the potential for capturing development value (through S106), creating buy-in to public sector investment opportunities, and by creating the critical mass to attract private investment and spending power. Furthermore, expanding the local employment land offer as part of a growth programme would potentially deliver a range of benefits, including a greater choice of options for investors and improved choice of employment for residents. In turn, higher levels of disposable income would both contribute to town centre regeneration and help to reverse negative perceptions of the town.

Altering the dynamics of the Harlow economy will be crucial in achieving future economic success and the current growth agenda presents a unique opportunity to do this. While the growth of Harlow will provide increased economic capacity in terms of population, workforce and business potential and help to tackle the regeneration needs, it importantly increases the capacity to attract public and private investment to Harlow which otherwise would not be realised.

The relationship between regeneration and growth, and the extent to which its scale and nature contributes towards regeneration need, is considered in more detail in the next section. Primarily this is examined through a series of scenarios to demonstrate how Harlow might change and the impact this would have on regeneration need.

4.3 Conclusion

It is clear that a fundamental change is required if Harlow's regeneration needs are to be addressed. Incremental approaches to the individual regeneration needs will only achieve marginal change and will not move Harlow from its current position of investment deficit and underperformance.

5 Regeneration and Growth

5.1 Overview

Future growth presents an opportunity to redress a number of the imbalances, which currently characterise the town vis-à-vis, its position in the sub-region, as well as to rectify internal problems, address economic and social deficiencies and to contribute to the achievement of the necessary pre-conditions for regeneration, including sustainable investment in infrastructure.

However, it will not only be vital that the future growth programme is considered hand in hand as part of a regeneration programme, but also that the rate and scale of growth proposed is appropriate to the town's needs, capacity and potential. It is recognised that while growth has the potential to positively affect Harlow, there is a potential risk that future growth, if not managed correctly, could have the effect of placing further burdens on the already overtaxed infrastructure and exacerbate the town's economic difficulties.

The scale of future growth therefore needs to be balanced against the potential regeneration benefits such growth might generate. To assess this, a range of future scenarios have been developed and tested in terms of their likely impacts. The scenarios are not forecasts for growth; rather they are tools for developing alternative 'pictures' of potential futures. They are intended to provide a guide to action by assessing both opportunity and risk generated, with the purpose of the realisation of an agreed long term goal for Harlow.

5.2 Scenarios for Harlow

The starting point for developing alternative scenarios for achieving the long term regeneration of Harlow is the past performance of the economy and the salient socio-economic and physical features that generate the current regeneration need. It is also recognised that Harlow is at a crossroads. It can either continue as a relatively weak and slowly growing sub-regional centre, or it can take advantage of its inclusion within the London-Stansted-Cambridge-Peterborough Growth Area designation to re-equip and re-invent itself as a modern economy. Three alternative scenarios have been developed for the future evolution of the Harlow economy to 2021, described below.

Scenario 1: A Continuation of Trends*

The 'Do-Nothing' scenario represents a continuation of the current employment trends in Harlow and indicates a level of regeneration achieved without additional growth. The future will continue to be characterised by low economic growth with employment forecasts of between **4,000 to 6,000 net additional jobs** (a 10% increase) to 2021. The corresponding growth in population would be **10,000 residents in 8,000 additional dwellings**.

The growth of Harlow is likely to be contained within its existing district boundary and will continue to be constrained by current infrastructure and economic deficits. The disparity between Harlow employment and Harlow residents, particularly in higher skill occupations, will reinforce the social exclusion in the town, with income and investment diverted to other areas. In terms of role and capacity, Harlow's critical mass will remain static.

Within this context investment will be limited. As a low growth area, Harlow will not exhibit the criteria or capacity to attract the levels of private or public investment required to foster regeneration. The investment deficit currently experienced will be maintained and continue to constrain the potential for economic growth in the town. Therefore, in light of significant growth in the M11 Corridor economies, Harlow would lose considerable competitive position over the plan period.

*See PACEC Technical Paper: 'City Size, Growth and Benefits to Residents and Firms in Harlow' for an explanation of the methodology behind the projects used in the scenarios

Scenario 2: Broadening Horizons - a Sub-Regional Focus by 2021¹⁴

This scenario sees the future of Harlow as a major sub-regional centre serving not only the needs of an increased sub-regional population but also those of a greatly expanded Stansted Airport. Employment opportunities in personal services (retailing, leisure, real estate and public services) increase sharply. Business service activity supporting the growth of Stansted Airport (distribution, transport, airline support business and travel related services) also increases with active measures to exploit the emerging employment opportunities and contribute to emerging airport clusters.

Employment in Harlow could increase by **11,000 to 13,000 jobs** (an increase of over one-quarter) and with a population increase of up to **22,000 residents** would require growth to be accommodated outside the district boundary. This scale of growth moves Harlow to a rate closer to that achieved in the Harlow Sub-Region over the last 20 yrs and re-captures Harlow's lost economic position.

The basis of this scenario is enhanced economic growth, which will require capital investment to upgrade and extend public infrastructure and generally improve the quality of the built environment. This capital injection facilitates re-structuring of the Harlow economy in support of the need for increased household and business services. Key investments would include:

- Investment in housing stock including up to **14,000 additional dwellings** (including affordable housing) and renewal of the council's housing stock.
- Improvements in accessibility with Stansted Airport, including improved public transport and car parking facilities, the upgrade of the M11 Junction 7, and major access routes out of Harlow.
- Continued expansion and upgrading of the town centre with expansion of retail and other service provision.
- Investment in the commercial stock of premises and sites for employment.

Requirements for neighbourhood renewal, social housing and strategic infrastructure aligned to the scale of development activity would be achieved in part, leaving some social and physical constraints to be dealt with in later years. This scenario is likely to maintain or improve Harlow's relative economic position in the context of significant growth in other areas of the M11 Corridor.

Scenario 3: Dynamic Transformation - a Regional Focus by 2021¹⁵

This scenario envisages a major breakout of the Harlow economy with sharply increased economic and demographic growth, greater integration into an M11 high-technology corridor and the growth of Stansted Airport, combined with a major restructuring towards a 'knowledge-based' economy. Harlow *extends* its role to become a centre of regional significance, an integral part of the wider knowledge-based M11 Corridor with a focus on R&D and high-technology manufacturing. Employment growth would be between **16,000 to 20,000 jobs**, a 40% increase on current employment levels, and a population growth to support this of up to **30,000-35,000 people**.

Capital formation as a major source of the dynamism of this scenario: physical, financial, human and social capital, both public and private. Growth would be rapid and managed to ensure that the necessary investment is attracted and old and new Harlow is integrated. This transformation will require the major physical regeneration of Harlow with investments including:

- Investment in housing stock to include in the region of **20,000 additional dwellings** (including affordable housing) and renewal of significant areas of public and private housing stock in the town. This would require expansion beyond the current district boundary.
- Major transport and infrastructure improvements including public transport, a new junction with the M11, link roads and improvement to railway stations.
- Major expansion of retail provision in the town centre to provide a flagship 'gateway' development and attractor for the expanded town.
- The full take-up and step change in employment land and build out in Harlow

An important part of these dynamics will be the capacity to attract residents embodying the skills appropriate to a modern knowledge-based economy. The significant investment to create the environment for success, coupled with the opportunity to restructure the economy would mean that Harlow rebuilds its relative competitive position and establishes a strong identity and role within the M11 Corridor and East of England region.

¹⁴ To put this scenario in context, the sub-regional role would require a 28% growth of employment over a twenty year period in Harlow, whereas the Harlow Sub-Region achieved a growth of 38% during the period 1981 to 2002.

¹⁵ A growth of 40% in employment is in line with the 38% employment growth in the Harlow Sub-Region economies between 1981 and 2002.

5.3 Scenario Appraisal

The appraisal of options includes two approaches: a subjective appraisal against regeneration needs; and a broad cost benefit appraisal.

5.3.1 Appraisal against regeneration needs

In Table 5.1 overleaf the scenarios are considered against a do-nothing situation and in terms of their ability to respond to Harlow's regeneration needs identified in Section 3. These are considered the preconditions for regeneration, and this initial appraisal considers the extent to which each scenario might satisfy these preconditions. The appraisal indicates that Scenario 3 is likely to perform best in terms of meeting the regeneration needs of Harlow.

5.3.2 The cost benefit of each scenario

Consideration of the broad cost benefit of each scenario follows the regeneration appraisal in Table 5.2. Cost considerations relate to the likely public sector infrastructure investment required to support regeneration and the levels of future growth under each scenario. Overall costs within each scenario include consideration of the infrastructure deficit, regeneration costs and growth costs. While the public sector cost clearly increases with the scale of growth anticipated, the fact that the infrastructure deficit is not directly proportionate to the level of growth means that cost efficiencies increase as growth increases.

The consideration of benefits indicates that only the levels of public sector infrastructure required under the high growth scenario will bring significant regeneration benefits to Harlow and address long standing constraints which have inhibited the realisation of Harlow's full economic potential. A critical factor when considering what benefits may be achieved under each of the three scenarios is the cost per unit of service provided. Economies of

scale will provide for a reduction in the unit cost of services provided across the range of provision, which is primarily public funded.

The indicative cost benefit of each scenario is illustrated in the table. Scenario 3 provides the greatest opportunity for private sector leverage and developer contribution to public costs and thereby an increase in overall value for money. It is anticipated that the major elements of transport infrastructure provision identified earlier in Section 2, including the new high quality North-South Public Transport Spine and new Link Road (A414 / M11), could only be funded under this scenario.

With regards to health, the level of primary and secondary care would be planned to provide the full range of general medical and surgical services, plus emergency care, at a level appropriate to the size of population. It is unlikely that even with relatively high growth, demand would be sufficient to justify another District General Hospital in the locality. Health development is more likely to be in the areas of elective treatment centres, expansion of community/intermediate care beds, and primary care facilities generally, which would require some investment even at the lowest levels of population growth.

Table 5.1: Appraisal against Regeneration Needs¹⁶

Regeneration Needs	Scenario 1	Scenario 2	Scenario 3	Comment
Step change in physical environment	-	+	++	<p><i>Scenario 1</i> is likely to result in ongoing decline, further pressure on overstretched infrastructure and urban fabric, and increased disparity between Harlow and the surrounding areas</p> <p><i>Scenario 2</i> has the potential to bring about some changes in the physical environment, with potential benefits to the existing population. However, these are likely to be limited to selected areas rather than comprising comprehensive renewal. Even with flagship projects, it is uncertain whether there will be sufficient momentum / private sector interest to carry this forward.</p> <p><i>Scenario 3</i> has the greatest potential to bring about a step change in the physical environment. Significant public investment in infrastructure could be justified on the basis of high growth leading to potential for comprehensive renewal. It creates the critical mass required to effect improvements to the town centre and housing choice.</p>
Dynamic Economic Base	-	++	++	<p>Under <i>Scenario 1</i> a step change in the physical environment is not possible. Widening investment deficit & continuing image degradation is likely.</p> <p>Under <i>Scenario 2</i>, Harlow emergence as a sub-regional centre with opportunities relating to the airport cluster and potential increased role of SMEs in the economy owing to increased market size. Improved skills-employment match is likely.</p> <p>Under <i>Scenario 3</i>, restructuring & repositioning of Harlow's economy likely to result in a growth in business services, assisted by support for SMEs. This scenario is more conducive to a sub-regional perspective and increased market size will contribute to economic and employment growth.</p>
Skilled and Innovative Workforce	0	++	++	<p>Continued mismatch between skills and employment likely under <i>Scenario 1</i>, although ongoing initiatives to address this will alleviate the situation</p> <p>Under <i>Scenario 2</i>, the workforce skills upgraded through in-migration and local training initiatives. Potential for skills retention due to improved opportunities and quality of life.</p> <p><i>Scenario 3</i> presents the greatest potential for a fundamental shift in the skills base owing to the scale and nature of inward migration. Combined with skills training initiatives (both public and employer supported), this scenario would facilitate a transformation of the workforce and Harlow's labour market offer.</p>
Positive Image	-	+	++	<p><i>Scenario 1</i> has the potential to further undermine Harlow's image.</p> <p><i>Scenario 2</i> has the potential to effect positive change in the town's image with some potential for flagship initiatives. Growth represents an opportunity for the creation of housing choice through renewal and new build and to effect public-private partnerships in transformation.</p> <p><i>Scenario 3</i> represents an opportunity for a major re-branding of Harlow as a knowledge based sub-regional player, with the greatest opportunity for flagship projects, town centre expansion and redevelopment, based on the expanded market. This scenario presents the best opportunity for improving levels of disposable income and overcoming negative perceptions of the town.</p>
Critical Mass for Investment	-	+	++	<p>Under <i>Scenario 1</i> it will be some time until thresholds for investment in infrastructure improvements are met, if ever, with the result that pressure on overtaxed systems will worsen.</p> <p>Under <i>Scenario 2</i>, major capital investment to upgrade & extend public infrastructure and improve environmental quality is envisaged through public/private contributions</p> <p><i>Scenario 3</i> presents the greatest potential for generating the necessary critical mass for public and private sector investment as a result of increased demand & access to a larger workforce. This scenario has the greatest potential for increasing the local employment land offer and for improved choice for residents.</p>

¹⁶ Scoring: ++ = likely to satisfy all regeneration preconditions; + = likely to satisfy some preconditions; 0 = overall neutral/marginal impact; - = unlikely to meet preconditions and further undermining Harlow's position

Item	Estimated Costs (£ million) per Scenario ¹⁷			Probability of Benefits per Scenario ¹⁸		
	1	2	3	1	2	3
Transport						
Increase capacity at Jct 7 / A414 capacity	10-14	10-14	10-14	X	X	XX
North-South Public Transport Corridor			114-164	O	O	XX
Demand Management Measures	5	5	5	X	X	XX
Cycle and Pedestrian networks	15	15	15	X	X	XX
Northern Link Road (A414-M11)		138-199	138-199	O	X	XX
New Pinnacles Link Road		15	15	O	O	X
Housing						
New Affordable Housing	46.8	87.75	117	X	X	XX
Backlog of Affordable Housing (estimate 1,000 dwelling in next six years)	20	20	20	O	X	XX
Backlog of repairs/maintenance	83	83	83	O	X	XX
Facilities						
Community Centres	3.52	6.6	8.8	O	O	X
Leisure and cultural facilities	5.6	10.5	14	O	X	XX
Outdoor Sports	3.28	6.15	8.2	O	X	XX
Open Spaces	3.2	6	8	O	O	X
Play Areas	0.16	0.3	0.4	O	O	X
Libraries	1.36	2.55	3.4	O	O	X
Waste						
Recycling and disposal	3.04	5.7	7.6	O	O	XX
Education						
Secondary Schools	30.4	57	76	O	X	XX
Primary Schools	20.88	39.15	52.2	O	X	XX
Nurseries	1.28	2.4	3.2	O	X	XX
Emergency Services						
Fire, Police, Ambulance	4.56	8.55	11.4	O	O	O
Health						
	See earlier note	See earlier note	See earlier note	XX	XX	XX
Total Public Sector Cost	257 – 261	519 – 584	710 – 823			

¹⁷ Transport and housing backlog costs referenced in Section 2. All other costs based on public sector cost per 1,000 dwelling estimated from 'South East Counties: Costing the Infrastructure Needs of the South East Counties', Final Report November 2004. See also cost parameters section 7.5.3

¹⁸ Key: O= low, X=medium, XX=high

5.4 Preferred Scenario – Dynamic Transformation

The appraisal indicates that growth will be critical to delivering the level of regeneration needed in Harlow. The levels of investment and change required will only be facilitated by significant growth, which will create the **critical mass for change** and the necessary **capacity and confidence to stimulate public and private sector investment**.

- *Scenario 1: Continuation of Trends* is clearly not an option in terms of its ability to address regeneration needs in Harlow. This scenario is likely to further undermine the position of the town relative to the high levels of growth anticipated in neighbouring economies. Current economic and infrastructure constraints would continue to inhibit the town and no fundamental change would occur to Harlow's situation.
- *Scenario 2: Broadening Horizons* would see significant regeneration occurring and the maintenance of the town's economic position relative to competing areas. Regeneration would be focused towards improving the economy and labour market through continuation/enhancement of existing regeneration activities, coupled with strategic investment in housing, transport and the town centre. However, the capacity created would be insufficient to attract the scale of investment necessary to address current deficits and future needs.
- *Scenario 3: Dynamic Transformation* has the potential to provide the scale of change needed to satisfy the regeneration needs of the town. This scenario has the critical mass required to enact change, deliver flagship projects, and fundamentally change the town through high and rapid growth that attracts necessary and immediate investment.

The high growth option is recognised as providing the greatest potential for the generation of more diverse employment opportunities and for a more dynamic economic base. This has positive implications for higher company

birth rates, greater productivity, and improved incomes. It also offers more potential for more investment in Harlow, not only on the basis of public sector infrastructure investment, but also in terms of the potential to capture private sector contributions. This is would be rendered possible on the basis that under a high growth scenario, a substantial turn around in Harlow's image could be enabled, with the result that private investment is more likely to be attracted.

However, it should be noted that this is predicated on significant public sector commitment in terms of policies and capital projects (infrastructure and flagship projects) supporting the high growth option and capable of transforming the town's image.

5.5 Can High Growth be achieved?

Recognising that higher and quicker growth provides greater potential for the regeneration of Harlow, the key question is: *how realistic is the high growth scenario and what level of employment growth could be achieved?*

The starting point for assessing whether this level of employment growth is realistic is the current situation and the continuation of these trends would indicate that a further 4,000 net additional jobs would be created in Harlow by 2021¹⁹. PACEC's own forecasting model, building upon the base and capturing the potential longer run catalytic effects of the London to Cambridge knowledge corridor and the development of sub-regional facilities in Harlow indicates that a further 7,000 net additional jobs could be

¹⁹ Experian BSL Regional Economic Forecasts, July 2004, PACEC: Housing and Employment in Harlow. Employment Projections. 2005.

created, given a total of 11,000 jobs to 2021 under a high employment growth scenario.

This puts identified employment growth in Harlow at the lower end of Scenario 2 (11,000 – 13,000 jobs) and indicates that significant change in the employment position could occur. However, to move from this position towards the growth of between 16,000 and 20,000 net new employees as in Scenario 3, a number of significant additional initiatives will be required, including:

- The development of the sub regional shopping centre.
- The development of a top quality business park, building on the potential of Harlow as a centre of excellence in research and development. This would require initiatives, such as incubators and enterprise training; to help small firm start ups.
- The possible addition of an R&D related higher education establishment.
- The development of an airport services cluster, strengthening the links with Stansted. This would require additional upgrading of the appropriate communication links.

This latter point is important in the context of continued growth in air travel and increasing passenger throughput at Stansted. Improved physical and labour market connectivity with Stansted provides significant potential for job opportunities for Harlow residents within the airport perimeter (raising the absolute and percentage share of Stansted employment held by Harlow residents), but also the potential for an air services cluster in Harlow as potential ‘catalytic’ employment impacts increase in line with the scale and nature of passenger growth.

Either as individual economic interventions or a package of measures, the above initiatives will contribute to the achievement of the economic change required to deliver regeneration. For example, analysis indicates that in total a sub-regional shopping centre has the potential to employ over 2,500 employees. Equally, a quality modern business park, similar to say Cambridge Business Park, might employ a similar level. These interventions would demonstrate a commitment to change, and would create the necessary confidence for further private sector investment.

5.6 Conclusions – Implications for Strategy

The analysis is clear: **continuation of existing economic performance will reinforce the relative decline of Harlow and current levels of public intervention are effectively ‘fire-fighting’**. While making valuable contributions to the social economy of Harlow, existing funding is insufficient to tackle the levels of economic and social deficit highlighted in the strategy. **The comprehensive regeneration of Harlow requires investment in an economic and physical step-change, much of which could be facilitated through growth and critical mass.**

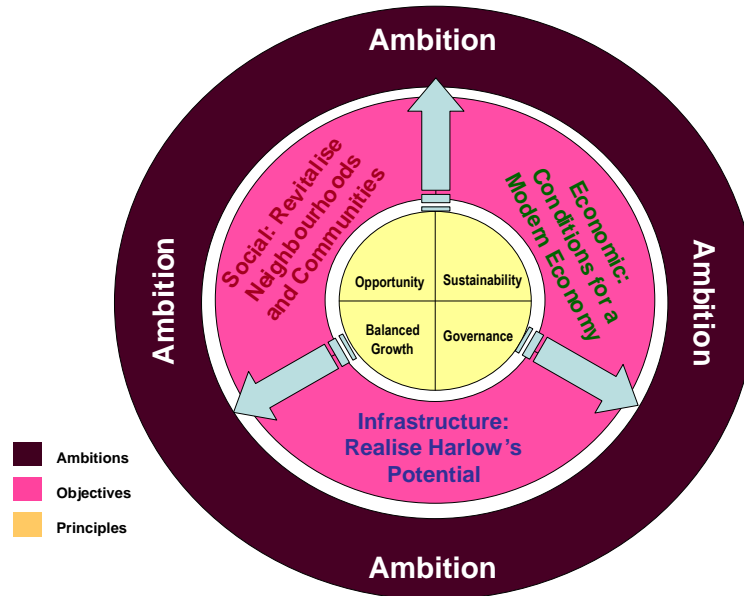
It is on this premise that the Regeneration Strategy Framework for Harlow is presented in the next Section.

6 A Framework for Regeneration

6.1 Introduction

The regeneration strategy for Harlow is outlined in this section. It provides a framework of **AMBITION, PRINCIPLES, OBJECTIVES and OUTCOMES** that aim to focus effort and resources from partner bodies to achieve the comprehensive regeneration of Harlow. **The strategy's roots lie firmly in Harlow's identified needs, and the premise that the greatest potential for regeneration is facilitated through growth and building critical mass for investment.**

The strategy framework is shown below.



6.2 The Ambition for Harlow

The ambition for Harlow involves meeting the current and future economic needs of Harlow and its residents. This requires creating an environment of opportunity in which the town and its people can prosper economically, and strategically investing in Harlow to realise the inherent potential of the town.

The ambition is for a new Harlow....

... that supports a balanced and inclusive society where people are attracted to live and work and creates wealth and prosperity for all

...with a key role in the regional economy that maximises the potential of its location and assets, meets the needs of the resident population and employers, and provides economic opportunity for all

...regenerated to provide a high quality of life, a strong sense of place and environment, and a sustainable approach to the future work/life/environment balance

...with the infrastructure capacity and facilities to grow, the flexibility to change, and the ability to respond to future economic and social challenges.

6.3 Core Principles

Four core principles are integral to the vision for a new Harlow:

★ **Balanced growth:** Rationale - growth should be accommodated to allow Harlow to fulfil its role as a regional centre within the East of England (regaining capacity and position lost over the preceding 20 years). The strategic and managed growth of Harlow provides the critical mass for overcoming constraints in social provision, community facilities and infrastructure.

★ **Opportunity for all:** Rationale - the regeneration of Harlow needs to provide opportunity and prosperity for all so that a vibrant and sustainable community is built that balances opportunities and integrates existing and new populations. In moving towards a new future, existing problems need to be addressed and exclusion avoided.

★ **Effective delivery, partnership and resources:** Rationale - a new model to engage partners, create confidence and champion the new future for Harlow, based on adequate resources. Leadership must be clear, dedicated and decisive with appropriate mechanisms and structures established to spearhead marketing and investment in Harlow.

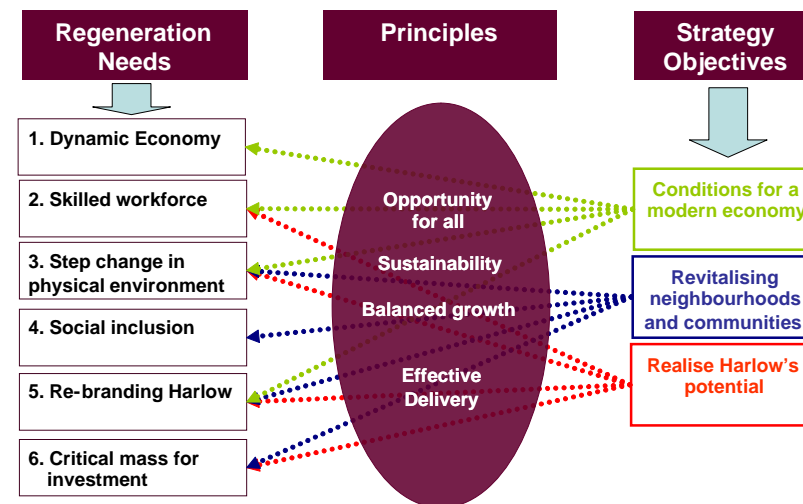
★ **Sustainability:** Rationale - regeneration based on the sustainable use of resources, ensuring the protection and enhancement of the local environment, quality of life improvements and economic benefits for residents and for the region.

6.4 Strategy Objectives and Outcomes

An integrated plan for the regeneration of Harlow is proposed that is driven by three Strategic Objectives:

- **Economic – to create the conditions for a modern economy**
- **Infrastructure – to realise Harlow’s potential**
- **Social – to revitalise Harlow’s neighbourhoods and communities**

These objectives relate directly to the regeneration needs of Harlow as outlined below.



1: Economic: Conditions for a Modern Economy

A dynamic and versatile business base is needed to ensure the future sustainability of the Harlow economy. Proactive approaches are required to diversify the economy, exploit the strengths and opportunities it presents, and broaden the range of the economic base. This objective sets out to create the conditions for economic diversification and growth, and provide support to allow entrepreneurs and businesses to respond to the future. In doing so, sustainability and inclusion will be promoted and demographic growth will help align economic opportunity with local benefits.

Outcomes:

1. **A broad and diverse business base within Harlow**
 - an environment for SMEs to grow and flourish.
 - building the economy around R&D base, hi-tech clusters, M11 corridor
 - a balanced economy of opportunity and prosperity.
2. **A culture of entrepreneurialism and innovation**
 - a successful and innovative business support network.
 - pro-active relationship between town and business.
 - high levels of self employment and business start-up
3. **High educational attainment across all levels**
 - effective working between business and education
 - good basic skills within the Harlow labour force
 - a life-long learning culture
4. **A highly skilled and adaptable workforce**
 - development of an Higher Education/Further Education sector in Harlow.
 - retention of higher skills and earners.
 - flexibility for future needs and requirements

5. Employment and workforce balance

- diverse and sustainable employment offer for Harlow residents.

2. Infrastructure: Realise Harlow's Potential

Harlow has rich untapped potential generated by its locational benefits and sectoral strengths. Through targeted and strategic interventions, the strategy aims to realise this potential and regain Harlow's role in the economic hierarchy of the region. Investment within this objective is targeted towards recapturing the town's position lost through economic underperformance and relative decline. Growth provides the context and opportunity for change and investment, but principles of inclusion and sustainability underpin the need to manage growth to ensure outcomes are delivered.

Outcomes:

1. **Affordable and decent homes to meet population needs**
 - making Harlow affordable, supporting local economic need.
 - provision of new and sustainable communities through growth.
 - meeting Government decent homes standards.
 - re-modelled and improved neighbourhoods.
2. **Choice and diversity in the housing market**
 - new neighbourhoods attractive to new social groupings.
 - Harlow as an attractive lifestyle location.
3. **A vibrant and sustainable commercial market**
 - active private development sector for commercial properties.
 - a successful and diverse portfolio of sites and premises.
 - new and connected commercial locations
4. **Re-positioning Harlow as a sub-regional centre**
 - a new sub-regional shopping centre and gateway to Harlow.

5. A connected and accessible Harlow

- a sustainable transport network for the future.
- a modal shift in transport away from private car usage.

3: Social: Revitalise Harlow's neighbourhoods & communities

The regeneration of Harlow's neighbourhoods and communities is essential to ensure existing residents benefit from growth and investment. Full integration, social inclusion and cohesion are required to deliver a sustainable and inclusive future for Harlow, where quality of life is matched by a sense of Harlow pride. Important to this will be capturing the benefits of growth for the existing communities of Harlow and raising aspirations, confidence and skills within the local workforce, as well as ensuring that the local communities are involved in the future of Harlow. The principles of opportunity, sustainability and managed growth are at the heart of this objective.

Outcomes

1. The physical and social regeneration of Harlow's most deprived neighbourhoods

- regenerated neighbourhood centres and hatches to provide new community services and facilities.
- reduction in deprivation levels within Harlow.

2. Prosperous neighbourhoods and communities

- alignment between Harlow's labour market and business needs.
- retention of higher earners within Harlow.
- higher aspirations / expectations within Harlow's communities.

3. Raised skills and participation in learning, through targeted measures to encourage a 'lifelong learning culture'

- strong basic skill levels within the adult population

4. The community as an active stakeholder in the new Harlow

- local communities involved on an ongoing basis in decision-making about the future of Harlow.

6.5 Measuring Strategy Performance

The strategy framework provides clear direction in terms of the ambitions for Harlow and the outcomes required to achieve these. To this framework we have assigned a series of performance indicators, aligned directly to the strategy outcomes. These indicators are to be used to measure the progress and performance of the regeneration strategy, but also to govern and direct resources and projects considered through the strategy framework.

The strategy indicators are firmly based on the evidence in the Harlow Needs Analysis, reflecting the town's current position and where it needs to move towards. What is important is improving the town's relative performance through narrowing of the gap between Harlow and relevant comparators (sub-regional, regional or national). Approaching performance on this basis reflects the fact that comparator areas will also progress economically and that comparator alignment is a moving target²⁰. For purposeful performance monitoring the evidence base and performance indicators will need to be reviewed on a regular basis.

²⁰ Where possible an absolute indicator of performance is given based on current populations of residents and businesses.

Table 6.1 overleaf presents the performance indicators for the regeneration of Harlow. They relate to the current statistical definition of Harlow local authority area. In most cases the target is to achieve parity or exceed comparator area statistics within a 10-year period to 2015.

Achievement of the Regeneration Strategy also depends on the successful implementation of a series of key actions and investment programmes detailed in Section 7.

Table 6.1: Strategy Performance Indicators

	Outcomes	Indicators	Baseline ²¹	Target ²² (current)	Target (additionality) ²³	ODPM PSA ²⁴
Objective 1: Economic	1. A broad and diverse business base (particularly focusing on inward investment and developing the SME sector)	E1: VAT businesses per 1,000 economically active popn	38.4	Region (65.3)	+ 1,100 VAT businesses	PSA2
		E2: SME share of total Harlow employment	53%	National (62%)	+ 3,700 SME jobs	PSA2
		E3: Business birth rate per 1,000 economically active popn	4.9	Region (6.4)	+ 60 births per annum	PSA2
	2. A culture of entrepreneurialism and innovation	E4: Self employment as % of total employment	9%	Region (13.4%)	+ 1,800 self employed persons	PSA2
	3. High levels of educational attainment	E5: % residents with no qualifications	32%	Sub-region (26%)	- 4,800 residents with no quals	PSA1, 2
	4. A highly skilled and adaptable workforce	E6: % residents with qualifications level 4/5	12%	Region (18%)	+ 4,500 residents with level 4/5	PSA1, 2
		E7: % residents attaining 5+ A*-C GCSEs	43%	LSC Area (56%)	+130 residents with 5+ A*-C GCSEs	PSA1, 2
	5. Employment and workforce balance	E8: Increase in Harlow employment base	44,400 jobs	Over 55,000 jobs period to 2021	+10,000 to 15,000 jobs	PSA2
Objective 2: Physical	1. Affordable and decent homes to meet population needs	P1: Affordable housing need	987	<100 by 2016	900 less h/holds in need	PSA5
		P2: Nos dwellings below decent homes standard	1300	Zero by 2010	1300 homes reaching standard	PSA1, 7
	2. Choice and diversity in the housing market	P3: % over-crowded households in total stock	8.2%	Region (5.2%)	-1,020 over-crowded households	PSA5
		P4: % owner occupied households in total stock	59.6%	Region (72.7%)	+ 4,400 owner occupiers	PSA5
	3. A vibrant and sustainable commercial market	P5: Average commercial rents (industrial / office)	To be determined	Sub-region	To be determined	PSA2
4. Re-positioned town centre	P6: Position in UK Retail Rankings	130	Improvement	Top 100	n/a	
5. Connected and accessible Harlow	P7: Modal share of Car (drivers and passengers)	67%	National (60%)	7% reduction in trips by car	n/a	
Objective 3: Social	1. Physical and social regeneration of Harlow's most deprived neighbourhoods	S1: % SOA's in region's most 10% deprived (education domain)	24%	<10%	8 less deprived SOA's	PSA1
		S2: % SOA's in region's most 10% deprived (crime domain)	18%	<10%	4 less deprived SOA's	PSA1
		S3: %SOA's in region's most 10% deprived (housing domain)	17%	<10%	4 less deprived SOA's	PSA1
		S4: % SOA's in region's most 10 deprived (health domain)	11%	<7%	2 less deprived SOA's	PSA1
	2. Prosperous neighbourhoods and communities	S5: Gross weekly wage (residency)	£372	Region (£416)	12% increase	PSA2
	3. Raised skills and participation in learning	S6: % population in poor literacy	28.1	Region (22.1)	2,600 less adults in poor literacy	PSA1, 2
		S7: % population in poor numeracy	30.5	Region (21.7)	3,800 less adults in poor numeracy	PSA1, 2

²¹ Source: PACEC, 'Harlow Needs and Issues Report', 2005

²² For the most part, targets are based on appropriate regional or national comparators which Harlow, in terms of performance, should be seeking to match or exceed over time. As noted in the text, comparators are not fixed and will change over time. Targets and comparators will therefore need to be regularly reviewed and adjusted.

²³ Where appropriate the target is also expressed in absolute terms to indicate the scale of change required.

²⁴ ODPM Public Service Agreements: PSA1 – Social exclusion; PSA2 – Economic performance; PSA5 – Housing; PSA7 – Social housing

6.6 Conclusion

This section has set the Framework to guide the regeneration of Harlow. In physical terms this will result in the renewal of large areas of Harlow alongside the extension of the town to create the critical mass for investment. This will include:

- Regeneration of Harlow’s most deprived neighbourhoods and areas, concentrated in the southern ward of Staple Tye
- A reappraisal of regeneration opportunities on the eastern side of Harlow, such as in relation to Old Harlow or employment locations, in the context of existing (New Hall) and proposed new development opportunities and infrastructure investments.
- A new gateway and heart of the town, stretching from the station area through the Harlow Gateway development to an expanded sub-regional shopping centre
- Renewal of existing employment areas facilitated by improved connectivity
- Strategic improvement to the transport infrastructure including connection to M11, east-west connections, and a new north-south high quality public transport route
- Improved sense of place and environment in Harlow, including the Stort Valley regional park

In economic terms the strategy will lead to:

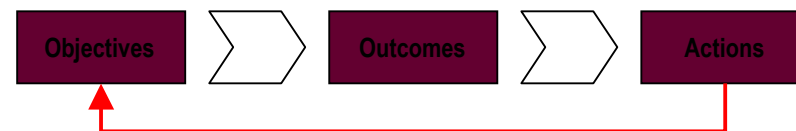
- A balanced and inclusive sub-regional economy, providing a range of opportunities for all parts of the community
- Up to 16,000 to 20,000 new employment opportunities by 2021 for Harlow residents

- A well trained and skilled labour force capable of responding to future economic challenges
- An economy that encourages innovation and entrepreneurialism, and provides a dynamic base for the future
- A prosperous population resulting from improved skills sand learning, higher value employment in Harlow, and greater self-containment in local opportunities.

6.7 Towards implementation...

The next step is consideration of how the strategic ambitions can be delivered in practical terms: what is needed to achieve the strategy outcomes and the key actions that will develop Harlow in economic, physical and social terms.

In presenting the implementation plan in the next Section, clear alignment is made between the strategy framework and priority actions identified. The linear relationship between what the strategy strives to achieve and the processes/actions required to do this is presented through the following process:



....Objectives are measured through Outcomes; Outcomes delivered through Actions; Actions contribute towards Objectives

7 Implementing the Strategy

7.1 Overview

This final section sets out a framework for implementing the strategy and outlines some of the key actions and programmes that need to be undertaken to achieve the regeneration process and the eventual step-change in Harlow. Taking the strategy forward will involve a multi-agency effort, with clear roles and responsibilities on delivery being assigned. Individual strategies will need to be aligned to provide more than the sum of their parts, and a multi-agency group will need to work up in more detail immediate programmes and projects for short-term implementation.

7.2 Timing and alignment

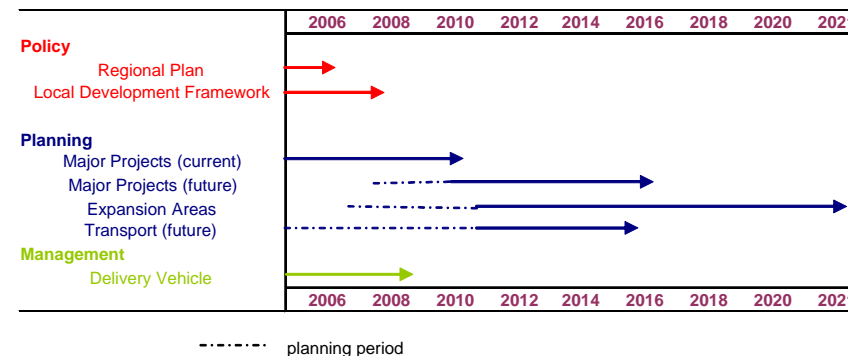
The Strategy Implementation Framework is founded on an understanding of the processes involved in regenerating Harlow and the need for policies, actions and projects to be fully aligned. Fundamentally there are three important considerations for delivery: **policy, planning and management**.

In terms of **policy**, the required framework will take time to implement. For example, it is anticipated that the Regional Plan will take until the end of 2006 to deliver and the Local Development Framework is likely to take until 2008 to be adopted. This means that over the first three to five years of the strategy the only developments realistically likely to happen are those already in the planning stage.

Development of major new infrastructure or flagship projects requires significant **planning** periods once policy is set. The step-change in Harlow

is very dependent on new transport infrastructure. This is likely to require a 6 to 8 year planning period from inception to implementation. Likewise major new growth areas (once identified) will require 2 to 4 years planning from initial masterplanning to full application. For example, the Northampton Joint Initiative²⁵ has taken 3 years to culminate in submission of a full planning application. Equally, **management** of the regeneration investment will require a special purpose vehicle, which could take 12-18 months to establish.

These considerations have been mapped out below and show the complexity and inter-linkage between the broad programmes and actions required to regenerate Harlow. **Consideration of these actions gives rise to a ‘Time Line for Change’ that provides an integrated and schematic approach to regeneration.**

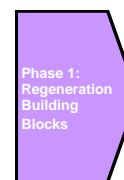
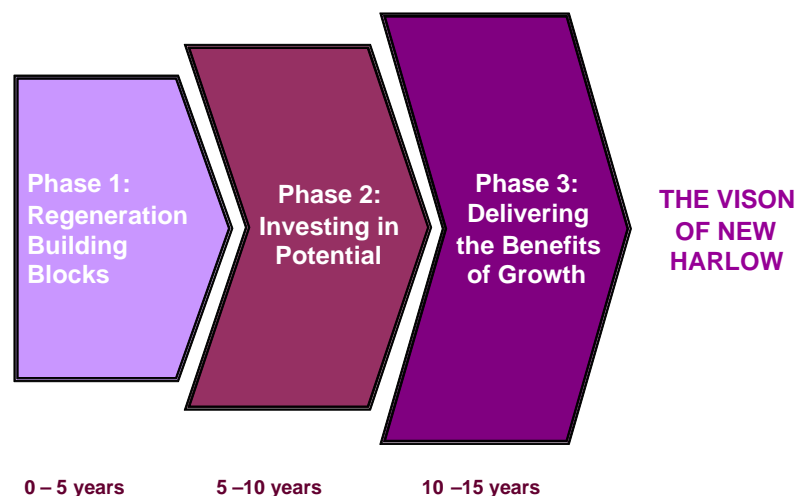


²⁵ Northampton Joint Initiative covers new growth areas in Northampton within the Milton Keynes - South Midlands Growth Area

7.3 Strategy Implementation Framework - ‘Time Line for Change’

The ‘Time-Line for Change’ in Harlow is based on three distinct phases of activity where each period provides the basis for moving forward. It recognises that certain actions and investments will need to be brought forward at different times, whether because they require extensive ‘pre-planning’ or are reliant on a series of preceding actions. **Within each phase the strategy identifies the key actions, investments and flagship projects required to move towards the New Harlow. As an overarching regeneration framework, the actions are intended to be strategic and will lead to more detailed actions identified by coordination between local partners and stakeholders.**

The ‘Time-Line for Change’ consists of the following phases:



0 – 5 years

Phase 1: Regeneration Building Blocks (0-5 year plan):

the immediate and early phase of the regeneration strategy to establish the **‘building blocks’** that will support the regeneration of the town. Within this timeframe the actions recognise, continue and reinforce the efforts already made towards regeneration in Harlow. A focus is on immediate actions to start the economic renewal process, build community capacity, tackle localised issues and improve the labour market.

Alongside this Harlow needs to **‘plan for the future’**, start making key decisions now on growth levels, move quickly to define planning policy and locations for urban extensions, and prioritise infrastructure requirements. There are significant ‘lead times’ associated with major infrastructure that need to be taken into account of. Phase 1 Actions are focused on:

- Priority actions on economic development to start the process of building and diversifying the economic base
- Priority actions on labour market issues to raise participation in learning, skill levels, and local community capacity and aspirations
- Immediate coordination and planning of the future growth and regeneration requirements
- Establishing strategic multi-agency programmes on Housing, Learning, Community and Business
- Delivery of early win investments



5 -10 years

Phase 2: Investing in Potential (5-10 years): the second plan period aims to put in place the **key investments** required to support the step change in Harlow’s regeneration and begin to take the town from infrastructure deficit to future prosperity. Following an intensive and effective ‘future planning’ period, it will be essential to move quickly on key infrastructure items so that transport, housing and employment projects can be implemented to change the nature and offer of Harlow. This key period of direct public intervention will define the speed and scale of future benefits attracted. **It is important to emphasise that delivery of Phase 2 is inextricably linked to delivering the critical mass required in Harlow. Critical mass will facilitate the investment required, from both the public and private sectors, to overcome Harlow’s current infrastructure deficit and build an economy that is fit for purpose**



10-15 years

Phase 3: Delivering the Benefits of Growth (10-15 year plan): the final phase of the strategy sees Harlow fully integrate the regeneration and growth agendas and move the town into a new economic position. After ten years of regeneration, many of the building blocks for regeneration would be in place, structural change in the economy underway, and many of the infrastructure constraints removed.

Phase 3 of the strategy would therefore realise the **benefits of this social and physical investment** through the unlocking and exploitation of economic potential, increased rates of private sector investment, and a population positioned to benefit from new opportunities. The strategy review should focus towards capturing the growth benefits in terms of economic and social opportunities, and realising the full extent of the growth strategy. Key actions or investments targeted will be facilitated by the increased capacity of Harlow and include:

- Development of major new residential districts and realisation of the final growth phase of Harlow
- Completion of the Epping-North Weald-Harlow Public Transport Corridor, facilitated by the growth in population and Harlow’s position as a regional centre.
- Significant step change in private sector investment, delivering economic and social benefit in Harlow.

7.4 *Action Plans*

The Actions Plans (Tables 7.1 and 7.2) indicate the core programmes and actions needed for creating a step change in Harlow’s economy. They are presented to give initial direction to the strategy and provide the initial ‘levers’ for regeneration. It is intended, particularly in Phase 1, that the Action Plans are used to develop a cohesive multi-agency response to the strategy setting out detailed actions, responsibilities and resources²⁶.

²⁶ Indicative cost estimates for key investments have been derived from sources used earlier in the strategy document (namely section 2.7 for transport infrastructure, Table 5.2 for growth costs), industry development benchmarks, and estimates for consultancy costs.

TABLE 7.1: PHASE 1 (0 – 5 years) Delivering the Regeneration Building Blocks

> GROWTH > INCLUSION > PARTNERSHIP > SUSTAINABLE	OBJECTIVE I – Economic: conditions for a modern economy	Intervention Type	Performance indicator(s)	Estimated Public Cost
	> Innovation Centre Project – associated with above, to promote SME and Start-up activity in Harlow	Investment	E3, E4	£6.25 - £7.25 million
	> Alignment – coordinate local, sub-regional and regional agencies (health, education, community, economic, business) within the Regeneration Strategy and develop a detailed plans	Action	All indicators	Officer time
	> Business Support Strategy - develop a programme of actions to deliver SME and Start-up improvements	Programme	E1 – E4	Officer time
	> Employment Land - designate new employment land to encourage market investment in sites and premises	Planning	E1 – E4, P4	£70,000 (consultancy support)
	> Business Forum – work with key businesses to exploit economic opportunities	Action	E1 – E4	Officer time
	> Image Harlow Project - re-brand and market Harlow with a focus towards encouraging inward investment	Action	E1 – E4	£100,000 (consultancy support)
	> HE/FE Initiative – develop the higher and further education sector by working with Harlow College and developing university links	Action	E6	Officer time
	> Enterprise education – build links and integration between businesses and Harlow schools and Harlow College	Action	E5, E6	Officer time
	> Project Stansted – develop labour market and economic links with the Airport to develop employment and business cluster opportunities	Action	E1, E2	Officer time
OBJECTIVE II – Physical: realise Harlow’s potential	Intervention Type	Performance indicator(s)	Estimated Public Cost	
> Growth Planning - translate RSS growth strategy in to local development frameworks	Planning	All indicators	Officer time	
> Infrastructure Planning – prioritise transport schemes within required policy framework and commence feasibility studies (including High Quality Public Transport Route)	Planning	All indicators	£1 million (consultancy support)	
> Growth Planning - define and masterplan Harlow’s growth areas	Action	All indicators	£0.5 million (consultancy support)	
> Neighbourhood Renewal Programme – establish a programme for renewal of most deprived neighbourhoods (initial priorities focused towards Staple Tye ward)	Programme / Investment	P1 - P3	£45 - £50 million	
> Neighbourhood Centres – Develop programmes for the physical regeneration including associated employment area	Investment	E1 – 4, S1 – S3	£5 million	
> Area Investment Frameworks – Develop integrated visions for the key regeneration focus areas e.g. Staple Tye northwards through to the town centre and New Hall/Old Harlow area ('Harlow East')	Action	All indicators	£100,000 (consultancy support)	
> Stort Valley Regional Park – development of significant environmental asset for Harlow	Flagship	All indicators	£15 million	
> New Housing – start development of New Hall Farm housing allocation	Investment	P1 – P3	Private sector	
> Gateway Project – completion of the Gateway Project	Flagship	P1 – P3	£42 million	
> Town Centre – completion of Town Centre South project / planning for Town Centre North	Investment / Planning	P6	£55 million	

Phase 1 (cont'd)

OBJECTIVE III: Social: revitalise neighbourhoods and communities	Intervention Type	Performance indicator(s)	Estimated Public Cost
› Establish an appropriate delivery structure to spearhead investment and growth in Harlow.	Action	All indicators	Officer time
› Continue to attract community level regeneration funding for support and capacity building (continuation of existing efforts)	Action	S1 – S4	Officer time
› Raise level of basic skills through a multi-agency approach focused on clearly targeted groups	Action	S5, S6	Officer time
› Community Development Strategy – building on the 2020 Vision and existing structures	Programme	S1 – S6	£50,000 (consultancy support)
› Local Learning Strategy – develop a multi-agency strategy on learning priorities	Programme	S5, S6, E5, E6	£50,000 (consultancy support)

Within the Phase 1 actions there are a number of fundamental principles and decisions that need to be established to provide a **critical path** for early delivery of the regeneration strategy. These are identified as follows and require EARLY action from the regeneration partners.

1. Define and plan the growth agenda for Harlow

This is the critical decision that will define the future for Harlow and potentially unlock funding opportunities. Harlow needs to support growth through the RSS EiP process and start planning for growth with local actions and decisions, not least because critical mass and capacity in Harlow underpins investment decisions from the public and private sector.

2. Establish a bespoke delivery vehicle

The regeneration of Harlow requires significant and dedicated resources in terms of staff and funding. Therefore, immediate action is required to establish an appropriate vehicle to manage the process and start building investor confidence in the town (as discussed in Section 6)

3. Multi-agency coordination

All stakeholders need to be brought on board with the regeneration strategy, alignment achieved between strategies, and short-term roles and responsibilities determined. This should include development of relevant support strategies

4. Priority Projects – early wins and regeneration ‘levers’

Within the framework of actions set out in the Phase 1 Action Plan, an initial suite of projects require prioritisation for immediate central and regional government biddings rounds through the Sustainable Communities funds.

TABLE 7.2: PHASE 2 (5 – 10 years) Investing in Infrastructure Changes

> GROWTH > INCLUSION > PARTNERSHIP > SUSTAINABLE	OBJECTIVE I – Economic: conditions for a modern economy	Intervention Type	Performance indicator(s)	Estimated Public Cost
	› Business Support Strategy - develop a programme of actions to deliver SME and Start-up improvements	Programme	E1 – E4	Officer time
	› Workspace Strategy – to support the provision of a quality portfolio of sites and premises	Programme	E1 – E4, P4	Officer time
	› Nortel Business Park – development of a strategic knowledge hub combining business and educational facilities	Investment	E1 – E4, P4	£25 million
	› HE/FE Initiative – implementation of HE hub in Harlow	Action	E6	Officer time
	› Project Stansted – develop a Airport-related business cluster in Harlow, building on Phase 1 actions	Action	E1, E2	Officer time
	OBJECTIVE II – Physical: realise Harlow’s potential	Intervention Type	Performance indicator(s)	Estimated Public Cost
	› Neighbourhood Renewal Programme – continuation of programme	Programme / Investment	P1 – P3	£45 - £50 million
	› Harlow Town Centre North – extension and re-positioning of the town centre as a sub-regional facility	Flagship	All indicators	£50 million
	› Old Harlow – new village hub for Harlow to support New Hall and growth areas	Flagship	All indicators	£20 million
	› Neighbourhood Centres – physical regeneration of the Stow and Potter Street and associated employment area	Investment	E1 – 4, S1 – S3	£20 million
	› Complete the A414 (A1/M11) east-west strategic link route (Relief Road) with new M11 junction	Flagship	All indicators	£110 - £140 million
	› Increase capacity at Jct 7, M11 and improve accessibility from Elizabeth Way	Investment	All indicators	£10 - £20 million
	› Private sector development of first growth areas	Investment	All indicators	Private sector
	› Growth Area Social Infrastructure - investment in public infrastructure to support growth (education, health, community)	Investment	S1 – S3	£200 million
	› Employment Area Initiative – redevelopment and regeneration based on improved accessibility	Programme	E1 – E4	To be agreed
	› High Quality Transport Route – implementation	Investment	All indicators	£95 - £140 million
	OBJECTIVE III: Social: revitalise neighbourhoods and communities	Intervention Type	Performance indicator(s)	Estimated Public Cost
› Community Development Strategy – review and reset priorities	Programme	S1 – S6	Officer time	
› Local Learning Strategy – review and reset priorities	Programme	S5, S6, E5, E6	Officer time	
› Continue to attract community level regeneration funding for support and capacity building (continuation of existing efforts)	Action	S1 – S4	Officer time	

7.4.1 *Plan, Monitor, Review*

The implementation framework has been established on the principles of **Plan, Monitor and Review**. Regeneration is a long term process and the context within which it is undertaken will change as the strategy matures. Therefore it is critical that programmes and actions are constantly reviewed and evolve to maintain relevance and rationale.

The performance indicators and evidence base provide important tools in monitoring progress and economic change. This evidence base will require updating every 3-5 years to facilitate interim evaluation of the strategy and ensure that future strategy direction and interventions remain valid. This is also important in moving between the different strategy phases when revised priorities and actions are formulated.

7.5 **Regeneration costs and funding**

The indicative costs of the regeneration strategy were set out earlier in the strategy. However, it is worth restating these costs and distinguishing between three broad cost categories: cost of the infrastructure deficit; cost of regeneration initiatives and the cost of sustainable growth.

7.5.1 *Scale of infrastructure deficit*

The scale of infrastructure deficit currently faced in Harlow is defined as the investment required to bring the transport and housing capacity in Harlow up to required standards for the existing population. These items are clearly identified in the needs and issues analysis and include all transport measures to improve accessibility, but excludes the North-South Public Transport corridor which is classed as a growth requirement. They also include the required investment to tackle the shortfall in affordable housing and the backlog in repairs/maintenance in the public and private housing stock.

In total the infrastructure deficit costs are as follows.

Transport Infrastructure ²⁷	£ million
Capacity at Jct 7 M11 / A414	10 – 14
Demand management measures	5
Cycle and pedestrian networks	15
Link road (A414 – M11)	138 – 199
New Pinnacles Link road	15
Housing Infrastructure ²⁸ e	
Backlog of affordable housing provision	20
Backlog of repairs/maintenance on social and private housing stock	83
Total infrastructure deficit	286 - 351

7.5.2 *Cost of regeneration initiatives*

The overall cost of the regeneration initiatives proposed in the strategy will be determined in due course once support strategies are fully developed and costed. Many of the strategic programmes and specific initiatives will consist of providing a more focused and integrated approach to regeneration across local partner agencies. In this respect, a significant aspect of this cost will consist of the re-profiling and pooling of existing partner resources towards targeted priorities. Partner agencies must be prepared to sign-up and endorse the strategy through the provision of supporting resources (both financial and staff capacity). In addition, Harlow needs to continue to exploit external regeneration funding opportunities and attract increasing public sector investment from the regional and national levels.

²⁷ Source: see footnote 8 and 9

²⁸ Source: see footnote 7

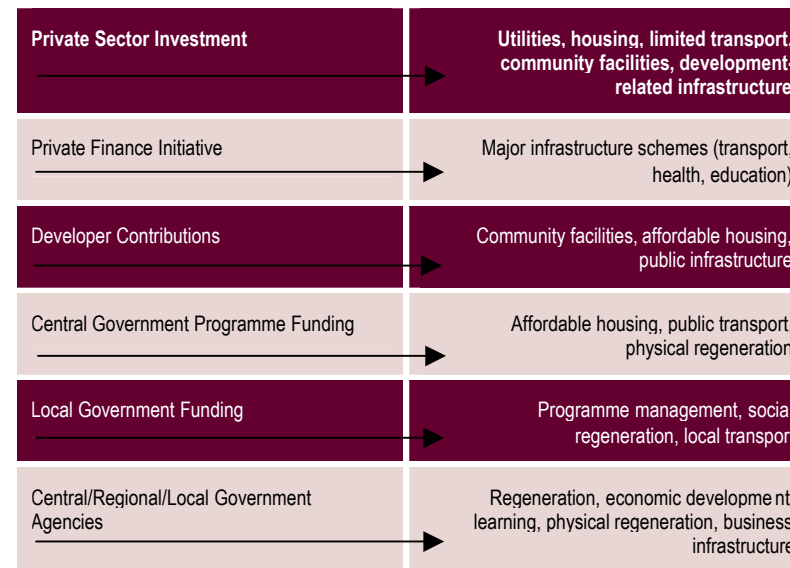
7.5.3 Public cost of the growth agenda

To deliver managed growth significant infrastructure investment, over and above that required for regeneration, will be required. To quantify the potential cost to the public sector, the scale of growth envisaged in Scenario 3 has been assumed (up to 20,000 additional dwellings) and the following infrastructure provided.

Item	Cost (£m) per 1,000 dwellings	Estimated Cost (£m)	Total cost (£ million)
Transport			
North-South Public Transport Corridor		114-164	114 - 164
Housing			
New Affordable Housing	5.85		117
Facilities			
Community Centres	0.44		8.8
Leisure Centres	0.7		14
Outdoor Sports	0.41		8.2
Open Spaces	0.4		8
Play Areas	0.02		0.4
Libraries	0.17		3.4
Waste			
Recycling and disposal	0.38		7.6
Education			
Secondary Schools	3.8		76
Primary Schools	2.61		52.2
Nurseries	0.16		3.2
Emergency Services			
Fire, Police, Ambulance	0.57		11.4
Total Public Sector Cost			424 - 474

7.5.4 Funding the regeneration of Harlow

The funding for regeneration and growth of Harlow is likely to derive from a number of sources, the main sources illustrated opposite. The choice of the delivery agency for the growth area could affect the scale of investment attracted, particularly from the private sector sources. Vehicles such as an Urban Development Corporation (UDC) or an Urban Regeneration Company arguably have the potential to generate more capital funding from Government sources, more revenue financing for staffing, and create the confidence to underpin private sector investment.



Developer contributions will form a significant part of the funding package for the regeneration strategy, particularly in terms of delivering the

community and transport infrastructure required for regeneration and growth. Based on previous analysis in other growth areas²⁹ it is estimated that 20,000 additional dwellings could generate developer contributions in the region of £200million - £300 million, representing between 30 - 40% of estimated total public sector cost. This proportion of overall cost falls with the number of dwellings, falling to between 20 - 30% of estimated costs associated with Scenario 1 (8,000 dwellings).

However, it is recognised that this funding will be generated later in the strategy process as the new expansion areas of Harlow are delivered. Immediate pump-priming investment is needed from the public sector to start the process of regeneration and build market confidence.

7.6 *Implementing Regeneration*

7.6.1 *Roles of Partner Agencies*

Partnership is a core principle underpinning the strategy and will be a critical factor in delivering sustainable regeneration in Harlow. Therefore clear roles need to be established for each of the partner agencies in Harlow through the alignment of respective strategies with the Regeneration Strategy. This will also require resources to be identified and allocated towards the strategic objectives.

The roles of key agencies will vary. It is recommended that ALL agencies be involved in shaping the necessary 'strategy and policy' frameworks required to deliver regeneration. However, some agencies will have a more critical role than others in implementing programmes and projects to deliver

aspects of regeneration. Some will be involved in both policy and delivery. Some will be involved monitoring progress to inform future delivery. The range of key agencies that will need to play a key role in delivering regeneration in Harlow include:

- Harlow Council
- Essex County Council
- Hertfordshire County Council
- Epping Forest District Council
- East Herts District Council
- East of England Development Agency
- GO-East
- English Partnerships
- Learning and Skills Council
- Business Link for Essex
- Harlow Primary Care Trust
- Princess Alexandra Hospital Trust
- Harlow Education Consortium
- Harlow College
- Harlow 2020 Partnership
- Harlow and District Chamber of Commerce

Appropriate stakeholder, community and voluntary sector involvement will also be important.

The responsibility of the partner agencies will be defined by the following: -

- Agencies should sign up and support the Regeneration Strategy
- Agencies need to align individual strategies to the Regeneration Strategy
- Agencies should align with specific Regeneration Strategy objectives to support thematic implementation (i.e. LSC, Harlow College to support efforts on skills and learning)
- Agencies need to work alongside and support the Delivery Vehicle charged with steering investment in Harlow
- Agencies (where appropriate) need to commit resource and effort to the Regeneration of Harlow

²⁹ Calculation based on Halcrow Group Ltd work on the Northampton Joint Initiative for English Partnerships.

- Agencies must work within a multi-agency context to develop the strategy, its detailed programmes and actions, and take appropriate responsibilities within their ‘technical agenda’.

7.6.2 *Importance of a Delivery Vehicle*

The nature of any delivery vehicle chosen should reflect the scale of task needed to achieve comprehensive regeneration and attract/manage the significant levels of investment required. It will

need to be a dedicated and fit-for-purpose local delivery vehicle, capable of demonstrating long term public sector commitment to the regeneration and growth process and build confidence in the development market.

A number of different potential delivery vehicles could be considered, each with a range of advantages and disadvantages. These include URC and UDC area regeneration type models, Public/Private Partnerships, Non Profit making Development or Charitable Trusts, Joint Venture models, Limited Liability Partnerships, and Local Facilitation Agency models. Overall, whatever form of delivery vehicle is decided most appropriate for Harlow it is considered that this should:

- Ideally reflect Harlow’s needs and character
- Have control of the strategy development and plan making process
- Have capacity to drive regeneration on behalf of the town
- Be able to lever in public and private sector investment
- Have the power to assemble land and capture development values
- Reflect key interests in the town.

8 Concluding Statement

The Harlow Regeneration Strategy establishes a challenging framework for the economic renewal of Harlow. It is a framework that will require determination, investment, dedicated resource and long-term, multi-agency commitment in order to achieve the step-change in the town needed to take it forward to a prosperous future.

The analysis presented in Section 2 provides a clear case for economic renewal, which all local partners identify with and support. In relative terms Harlow's economy is underperforming, resulting in the town's increasing loss of competitive position. This, coupled with the original nature of Harlow's development and historical under investment, has reinforced areas of market failure and resulted in urban decay (town centre, housing) and constrained infrastructure (transport, community). The analysis clearly sets out that **continuation of existing economic performance will reinforce the relative decline of Harlow and that current levels of public intervention are effectively 'fire-fighting'**

The strategy sets out six regeneration needs for Harlow, targeted at releasing the undoubted economic potential of Harlow (primarily dictated by its location):

- Need 1: Building a Dynamic Economy
- Need 2: A Skilled and Innovative Workforce
- Need 3: A 'Step Change' in the Physical Environment
- Need 4: Social Inclusion for All

- Need 5: The Re-Branding of Harlow
- Need 6: Creating the Critical Mass for Investment

To meet these needs and release Harlow's potential, the strategy presents a framework of Ambitions, Objectives and Actions. However, given the level of investment required **regeneration is inextricably linked to the growth of Harlow, in so much that critical mass is required to generate investment from the public and private sector.** To move forward Harlow must remove current constraints, in terms of housing and transport, and achieve a step-change in the physicality and economy of the town. The higher the level of growth, the greater the opportunity created to lever in public and private sector investment for change.

The ambition is for a new Harlow...that supports a **balanced and inclusive society** where people are attracted to live and work and creates wealth and prosperity for all... **plays a key role in the regional economy** that maximises the potential of its location and assets...**provides a high quality of life**, a strong sense of place and a sustainable approach to the future work/life/environment balance...with the **infrastructure capacity and facilities** to grow, the flexibility to change, and the ability to respond to future economic and social challenges.

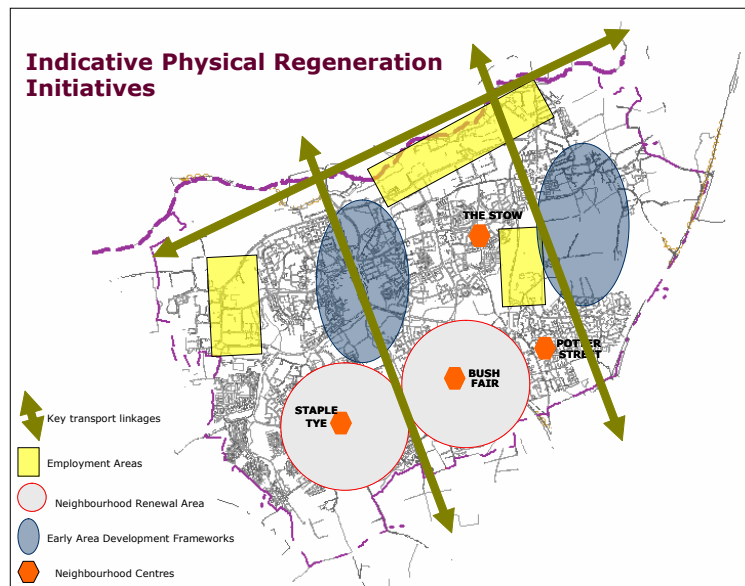
The ambition requires both the economic and physical renewal of Harlow, where infrastructure step-change reinforces economic-led regeneration. Key investments required include:

- Major areas of **neighbourhood renewal** targeted on the most deprived areas of the town, concentrated in the Staple Tye wards
- Early integrated development of two key areas: **Central Harlow** (including the town centre, Harlow Gateway and Station Area), and

East/Old Harlow (integrating Harlow Old Town, New Hall Area, and Nortel land). These build upon existing opportunities and provide early opportunity for significant change in Harlow.

- Renewal and investment in **Harlow's key employment areas** (The Pinnacles, Temple Fields) and a new employment/educational hub
- Regeneration of Harlow's **neighbourhood centres** as the focus for community facilities.

These are shown schematically below



In economic terms the strategy will lead to:

- A balanced and inclusive sub-regional economy
- Up to 16,000 to 20,000 new employment opportunities by 2021

- A well trained and skilled labour force capable of responding to future economic challenges
- An economy that encourages innovation and entrepreneurialism
- A prosperous population resulting from improved skills and learning, higher value employment in Harlow, and greater self-containment in local opportunities.

To deliver these projects alongside economic change will require detailed and early planning, multi-agency coordination, and a bespoke delivery vehicle to rebuild investment confidence in the town. Therefore, to start the regeneration process, it is recommended that early agreement is made on:

- Defining and planning for the growth agenda (needed to underpin investment and project decisions)
- The nature of the delivery vehicle for Harlow
- The roles and responsibilities of partner agencies in Harlow
- The prioritisation and planning of key projects (including early wins)

