

An Economic Strategy for Cheshire East

2019 to 2024



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1. INTRODUCTION

Cheshire East is the third largest local authority area in the North West, with a population of 378,800 covering 1,116 km². With a strong economy and high employment rates, it has long been a highly desirable place to live. It has excellent connectivity with the rest of the UK which will be boosted by the arrival of HS2 at Crewe in 2027; business locations such as Alderley Park and Crewe Business Park that attract cutting edge international firms; and educational standards among the best in the country.

Its vibrant and successful economy, rich natural environment and strong sense of community, make Cheshire East one of the best places to be in the UK. The richness and diversity of the built environment, cultural heritage, attractive townscapes and landscapes provide Cheshire East with its own unique character and identity.

We sit in a strategically important position connecting the Northern Powerhouse to the Midlands Engine and are therefore a key player in delivering economic growth in the region and the UK. Our outward looking and innovative business base is well placed to respond to the challenge set by government through its Industrial Strategy, and we are creating a strong offer through our contribution to the Cheshire and Warrington Local Industrial Strategy.

But we cannot be complacent; as a borough we need to be proactive and invest and intervene where it makes sense to:

- Protect and enhance the quality of place and environment that is so important to the character of Cheshire East, from its towns to its rural areas, from its cultural offer to its green infrastructure and also intervene in the housing market to deliver the right houses in the right places.
- Secure investment in strategic infrastructure such as rail hub stations and major roads to enable housing and employment growth to be delivered in a sustainable manner in line with the Local Plan, capitalising on the growth opportunity of HS2 and improving connectivity options, efficiency and sustainability.
- Develop the workforce to provide the right skills for our economy by supporting our residents to improve their skills levels and ensuring education provision meets the demands of our employers.
- Create the right conditions for business growth with a focus on our key businesses and growth sectors through tailored support, the provision of inward investment opportunities and place marketing.
- Increase the economic contribution of the cultural and visitor economy and position Cheshire East as a visitor destination.

The five-year Cheshire East Economic Strategy 2019 – 2024 and associated Action Plan set out an ambition for sustainable growth and the key priorities to enable and drive forward delivery. This will support us in; articulating our offer and opportunity to investors; framing our conversations with the Local Enterprise Partnership (LEP) and Government Departments and any strategic bids we will be submitting in the future for national programmes; and ensuring we are prepared for the post Exit from the EU funding landscape and the UK Shared Prosperity Fund.

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2. ECONOMIC CONTEXT

Building on our success

Cheshire East is one of the UK's most successful places with our economic performance consistently and significantly exceeding both the regional and national average.

Addressing our challenges and barriers to growth

We have made significant progress, with a programme of action for economic growth in place flowing from the Local Enterprise Partnership's Strategic Economic Plan and our growth proposals. However, there are a number of challenges that could affect our ambition to sustain this growth.

(See Appendix I)

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3. AMBITION FOR GROWTH

Making Cheshire East 'The Place to Be'

We are ideally positioned for growth, with excellent connectivity, a strong economy with even greater potential and a pro-investment approach. Our ambition is to grow our economy through strong and consistent local leadership. This strategy sets a vision for the place and outlines how we will deliver this vision through its Action Plan. We aim to ensure that growth is balanced with quality and focussed on the right areas to improve productivity and boost economic growth to ensure that Cheshire East continues to provide the best 'Place to Be' for our residents, visitors, businesses and investors.

We will be a place that is attractive to a well-educated, skilled, adaptable workforce, delivers vibrant town centres and commercial spaces and offers high quality urban and rural places. Our vision for these places is not limited to infrastructure and commercial development but recognises the importance and contribution that culture, heritage, green and blue infrastructure, leisure and the visitor offer can bring to the quality of place.

In seeking growth we will also address measures that protect and improve our environment. This is set out in our Environment Strategy as we seek to become a carbon neutral borough, increase resilience, encourage more sustainable consumption and production, seek clean growth and deliver an outstanding natural environment.

Recognising the need to attract and retain businesses, the target age range and skills sets that we need to fulfil our ambitions for growth, quality of place will be an important part of our Economic Strategy along with Place Marketing, supporting locational decisions about where to live, work and invest.

As outlined in our Local Plan, we plan to support growth in the Borough, with 58,100 additional residents, 36,000 new homes (a 56% increase since 2010) and 31,000 new jobs being delivered by 2030. This is a bold, pro-growth agenda, which will build on our existing strong economy which delivers £12.5 billion annually¹ (around 44% of the Cheshire and Warrington output and 8% of the North West output). We will therefore be a driving force in delivering the LEP's target to grow the sub-regional economy to £50 billion GVA by 2040.

So for the period of this strategy by 2024 there is an ambition to:

¹ Regional Gross Value Added (Income Approach) 1997-2016 data, ONS, December 2017

- Grow the Cheshire East Economy to at least £15 billion
- Create an additional 7,000 jobs
- Build up to 11,000 new homes
- Be more productive than the UK average

The majority of this growth is likely to be generated by major Council-led initiatives including the development of Crewe, Macclesfield and the Cheshire Science Corridor. HS2 will reach Crewe by 2027, six years earlier than originally planned, and will be a major catalyst for much of this growth, with the Constellation Partnership Growth Strategy in place to realise the full benefit of this opportunity.

Our priorities here constitute a Cheshire East Council led programme of work. We recognise that much economic development is undertaken at the sub-regional level and in partnership with the Local Enterprise Partnership, Government and the private sector.

We have five priority themes to make our vision a reality - together they will make Cheshire East the Place to Live, Connect, Work and Learn, Invest and Visit.

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4. PRIORITY THEMES AND STRATEGIC OBJECTIVES

Priority theme 1 – The Place to Live

- Strategic Objective 1 Improve quality of place, with a focus on regenerating our town centres
- Strategic Objective 2 Influence housing delivery to expand the variety of housing and tenure
- Strategic Objective 3 Protect and enhance the environment and economy in rural areas

Priority theme 2 – The Place to Connect

- Strategic Objective 4 Capitalise on the growth opportunity of HS2
- Strategic Objective 5 Improve connectivity options, efficiency and sustainability

Priority theme 3 – The Place to Learn and Work

- Strategic Objective 6 Support residents to improve their skills levels
- Strategic Objective 7 Ensure education provision meets employer demand

Priority theme 4 – The Place to Invest

- Strategic Objective 8 Strengthen business support, particularly for our key businesses
- Strategic Objective 9 Deliver and grow the Cheshire East Science Corridor
- Strategic Objective 10 Develop a clear Place Marketing Approach and Investment Plan

Priority theme 5 – The Place to Visit

- Strategic Objective 11 Increase the economic contribution of the cultural and visitor economy
- Strategic Objective 12 Position Cheshire East as a visitor destination

5. PRIORITY THEME 1 – ‘The Place to live’

Cheshire East provides opportunities to enjoy a high quality of life with thriving market towns and village communities; a network of open space and waterways; major leisure and retail operators; plus visitor attractions including Jodrell Bank, Quarry Bank Mill and Tatton Park.

With a proven ‘Quality of Place’ Cheshire East has twice topped the Grant Thornton Vibrant Economy Index for the north west.² The Borough is renowned for its beautiful and uncluttered spaces, its vibrant economy, its magnificent countryside, its enviable living and educational standards and its seemingly endless list of things to see and do.

In delivering growth in the area’s economy, Cheshire East Council has ensured that culture, heritage and environmental improvements keep pace with its growth ambition but we need to protect and enhance the quality of place and environment that is so important to the character of Cheshire East, from its towns to its rural areas, from its cultural offer to its green infrastructure. We want to be a place that maximises the attraction and retention of the workforce demanded by our growing businesses and increases residential opportunities in town centres to support the economic offer.

Strategic Objective 1 – Improve quality of place, with a focus on regenerating our town centres

A recent business survey³ put ‘the overall attractiveness of the area’ as the most popular benefit of being located in Cheshire East (cited by 66%). Getting our quality of place right will mean that we support our existing and new businesses to grow, retain and attract highly skilled people and support local residents to be as successful as possible. Cheshire East Council’s Corporate Plan and the Local Enterprise Partnership’s sub-regional Strategic Economic Plan (SEP) support the joint ambition to ensure we have a place that is attractive to a well-educated, skilled, adaptable workforce; to deliver high quality vibrant town centres; and create an area offering high quality urban and rural places. Major town centre regeneration projects help to align our investment in infrastructure, housing and cultural and visitor economy activity and the right approach to town centre living linked with other measures that improve the vibrancy of towns whilst retaining the individual characteristics of town centres will form part of a strong place proposition to help attract or retain target groups and skills.

² Vibrant Economy Index – A new way to measure economic success (Grant Thornton April 2018)

³ Cheshire Business Survey 2017

Crewe Town Centre

Crewe is a gateway with exceptional connections and a bright future evolving with the development HS2 high speed rail. In 2017, the CW postcode was named the second best place to live in the UK by Property Week's Hot 100. The arrival of HS2 at Crewe in 2027 will be a major catalyst for regeneration in the south of the borough and the Hub Station will unlock the regeneration of Crewe. In order to derive optimum benefit from the new HS2 Hub rail station, Crewe must develop to provide an offer that can exceed the expectations of a rapidly growing and increasingly aspirational residential catchment area and an ambitious business community. It must also develop strong links with the HS2 Hub rail station delivered through; physical infrastructure changes, building development and innovative, vanguard urban design that enhances accessibility and key gateway sites.

Strategic Masterplan for Crewe – is being developed to help the town shape and evolve its future and to realise the benefits of the HS2 Crewe Hub linked to a Regeneration Framework for the short, medium and long term future of Crewe Town Centre and HS2 Hub Station plans. The Council is leading on the comprehensive regeneration of Crewe Town Centre with a £40 million programme of work including £10 million allocated from the Local Growth Fund for a flagship, mixed-use retail and leisure development. The town centre regeneration scheme plays a central role in kick starting preparations to make Crewe “HS2 Ready” and has already secured one of the UK's leading independent cinema operators to anchor the development. A Cultural Strategy is being developed working with local organisations to support place culture led economic growth in Crewe and a proposal for a ‘History Centre’ is also being developed that will be central to realising the ‘cultural quarter’ proposals for the regeneration plan.

Action: Deliver the redevelopment of the Royal Arcade site for a leisure-led mixed-use transformational scheme incorporating a new bus interchange, multi-storey car park, cinema and associated leisure (food and beverage), ancillary retail and other uses.

Action: Remodel the civic hub aligned to objectives for the Civic and Cultural Quarter.

Action: Deliver public realm enhancements particularly in pedestrianised areas and at key gateways to the town centre, utilising high quality design and materials, street furniture and public art to enhance quality of place, and improve legibility and the town centre experience for residents and visitors.

Action: Develop partnerships to bring forward development opportunities which will enhance the town centre offer and prepare the ground for Crewe's role as the home to a major HS2 Hub station, ensuring that Crewe has a ‘High Speed–ready Heart’.

Action: To commission a comprehensive town centre car parking strategy integrated with a site options assessment which seeks to support town centre regeneration priorities and unlock development opportunities whilst enhancing overall parking facilities.

Macclesfield Town Centre

Macclesfield enjoys a reputation as a creative/entrepreneurial place and for its combination of heritage and unique character, its access to the Peak district and transport connectivity. The revitalisation of Macclesfield town centre is also identified as a strategic priority with opportunities to support further regeneration and investment. The overriding objective is to create a quality of life and urban environment which is attractive for all those who want to live, work and shop in Macclesfield. To do this the focus must be on offering increased high quality retail provision, a varied and interesting entertainment centre, a mix of residential accommodation and high quality commercial space. Macclesfield is well connected with frequent trains to London and Manchester and in light of this connectivity there is a significant opportunity to create a 'hub' of activity built around the station with commercial, residential and leisure development.

Strategic Regeneration Framework for Macclesfield – The vision for this area is to showcase heritage and cultural assets, the links to stunning countryside and the town's distinctive quirkiness, to address weaknesses and to sensitively diversify the town centre offer to maximise opportunities without detracting from the areas positive distinctive qualities. Work has already been undertaken to lay the foundations for future regeneration projects. A Heritage and Culture Strategy has been produced, a Heritage Assets Regeneration Plan identifies key heritage buildings offering opportunities for regeneration and work is already well underway in bringing forward a public realm scheme for Castle Street in the Primary Shopping Area. A Strategic Regeneration Framework (SRF) for Macclesfield Town Centre has been commissioned which will set out a fresh vision for the town centre, identifying priority objectives if regeneration is to be delivered and outlining a route map for the Council and other stakeholders to unlock the potential of the town centre.

Action: Subject to Cabinet approval, to adopt the Macclesfield Town Centre SRF as an overarching, holistic, cross service framework to ensure that the Council's ambitions for its regeneration and revitalisation are supported and pursued across the organisation.

Action: Work with partners to deliver and refresh the Cultural and Heritage Strategy for Macclesfield to support regeneration plans.

Action: To deliver the Castle Street public realm enhancements and to pursue further public realm schemes to enhance quality of place, support the 'greening' of

the town centre, give greater priority to pedestrians and cyclists, improve legibility and enhance the town centre experience for residents and visitors.

Action: To commission a comprehensive car parking review and strategy for the town centre which seeks to enhance car parking provision in a manner which supports town centre regeneration and unlocks development opportunities in current inefficient surface car parks.

Action: To preserve and enhance townscape heritage, reviewing the Conservation areas and conservation related planning policies and the approach to enforcement of advertisements etc. by Planning and Highways to generally raise aspirations and quality of place.

Action: To develop potential partnerships to bring forward development opportunities which will enhance the existing town centre offer including opportunities for redevelopment of the station gateway to deliver a commercial, residential, leisure hub and enhanced public realm whilst ensuring appropriate parking provision is retained/re-provided.

Market Towns

Set within a rural backdrop, yet close to Manchester, Chester and Liverpool, places like Knutsford, Wilmslow and Alderley Edge offer an enviable quality of life. We have a number of vibrant and historic towns located throughout the borough with attractive and varied townscapes, listed buildings and distinctive characters. They provide high quality living and working environments and are a key part of the borough's visitor economy. Many are also designated as conservation areas. A rich and historic environment provides the focus for vibrant and locally distinct communities, with a strong sense of place and self. The towns also provide a valuable link to rural communities, which are equally vital to the wider economy and local identity. Their conservation and enhancement is extremely important, to ensure that communities remain genuinely sustainable, retain their individual character and maintain their important economic function.

Action: Prepare a programme for the production of Actions Plans for the Key Service Centres (Tier 2 Towns - Alsager, Congleton, Handforth, Knutsford, Middlewich, Nantwich, Poynton, Sandbach and Wilmslow) by 2019/20 across Cheshire East to include an analysis of the performance of each town, key attributes, strengths and challenges and recommendations for a vision, objectives and priority actions.

Action: Prepare a programme for the production of Actions Plans for Local Service Centres (Tier 3 Towns - Alderley Edge, Audlem, Bollington, Bunbury, Chelford, Disley, Goostrey, Haslington, Holmes Chapel, Mobberley, Prestbury, Shavington and Wrenbury) by 2020/22 across Cheshire East to include an analysis of the

performance of each town, key attributes, strengths and challenges and recommendations for a vision, objectives and priority actions.

Strategic Objective 2 – Influence housing delivery to expand the variety of housing and tenure

Cheshire East has a strong ambition for jobs-led economic growth across all areas and housing is essential to support this continuous growth. If housing is considered in isolation to our planned investment and regeneration, then sustainable growth or successful outcomes are unlikely to be achieved. We want to influence the type and quality of new homes, ensuring that the right mix of housing tenure is delivered in the right place at the right time and in conjunction with employment development and infrastructure schemes. Where the market is not currently meeting housing need we will explore interventions to bring this forward.

To support growth and to ensure we continue to meet the challenging needs of our existing population, we need to provide high quality, market facing housing. Providing that choice will be essential to attract and retain the skilled and diverse workforce required by a growing economy. The new Cheshire East Housing Strategy addresses the Council's approach to new housing between 2018 and 2023 and reflects the changes to the local and national housing policy landscape.

Over the past 3 years we have successfully worked with our partners to deliver almost 1,400 affordable homes and brought 243 empty homes back into use. We have increased resident opportunities for homes through our Housing Options Team by providing homes for 5,400 people and families, preventing over 2,000 individuals and families becoming homeless. Furthermore the council is directly facilitating major developments at 3 of our strategic sites at Handforth, Leighton and South Macclesfield with £41.7 million of Housing Infrastructure Funding (HIF) to deliver 4,200 new units

Accelerating delivery

As our economy grows so too will our population. This requires a major step change in housing provision above previous construction levels and delivery rates. The Government's White Paper on Housing calls on all parties to 'up their game' in contributing to delivery of increased housing numbers and as a Council we are really pulling our weight on meeting the housing crisis. The newly adopted Local Plan allocates around 2,500 acres of land for housing, an area over 3 times the size of the city of London and large enough to lay out more than 1,400 football pitches; we currently have planning consent for over 20,000 units in place and 400 housing sites are under construction. 2,321 homes were built in Cheshire East in 2017/18; the 8th highest delivery rate in England. We want to build on our current successes and with government support we can do more and realise our potential. We have unlocked

further capacity by ensuring that the infrastructure is in place to support new developments e.g. recent designation for a Garden Village in Handforth to provide 1600 homes in a high quality innovative environment. The focus going forward will be on accelerating the pace of delivery on the significant quantum of land currently identified; delivery of 30% affordable housing allocations; exploring the potential of interventions such as access to funding (a main constraint on delivery), use of modular construction methods and development of construction training schemes.

Choice of tenure

The borough has significant housing challenges that go beyond the quantum of housing provision with the need to meet affordable housing challenges in the north of the borough and to support regeneration in Crewe and Macclesfield. In order to meet these challenges the authority wants to work more closely with government on a shared basis to deliver housing and innovate in terms of housing products and delivery. Properties need to be a mix of tenures to provide affordable options and present opportunities for those who wish to access the housing ladder, but also provide a good quality rental sector. We are actively working with our Registered Providers to bring forward new affordable homes and show our commitment to delivering Government initiatives including the Starter Homes Programme and Local Development Orders.

Demographic change

Working with partners in the private and public sector we strive to create the right conditions (in relation to site availability, infrastructure and finance) that enable the housing market to respond effectively to demand and to support sustainable population and economic growth. Around 40 per cent of young adults cannot afford to buy one of the cheapest homes in their area even with a 10 per cent deposit, according to research by The Institute for Fiscal Studies which said house prices in England have risen by 173 per cent over two decades, while average pay for 25-34 year-olds has grown by just 19 per cent over the same period⁴. The housing offer needs to be responsive to demographic shifts, meeting the needs of an ageing population while providing for the formation of new households.

Current housing stock

Whilst concentrating on increasing the supply of new homes, we need to ensure that our current housing stock doesn't deteriorate. We do this by offering financial assistance via loans to residents who are not able to access alternative financial

⁴ <https://www.ifs.org.uk/publications/13475>

assistance via commercial lenders. We have increased our relationships with private rented landlords and provided direct support for our most vulnerable residents, for example we have completed almost 6,000 adaptations at a cost over £4 million, to enable occupants to live independently.

Action: Deliver key strategic sites within the Borough e.g. Handforth Garden Village, South Macclesfield Development Area and North West Crewe.

Action: Develop an appropriate housing delivery model via a Joint Venture or Housing Company to support the right quality and tenure mix of housing that we need to support the housing market.

Action: Undertake strategic acquisitions in areas where the housing market needs major intervention to support economic growth.

Action: Engage with developers and housing providers to work strategically with the Council to develop the right type of housing.

Action: Support an Accelerated Construction Programme.

Action: Develop a Supplementary Planning Document on housing mix supported by a new housing study.

Action: Identify opportunities for the release of public sector land for housing delivery through One Public Estate.

Strategic Objective 3 – Protect and enhance the environment and economy in rural areas

Cheshire East is defined by the Rural Services Network SPARSE classification as a council considered 'predominantly rural', while the Defra Rural Classification for the Borough is 'urban with significant rural'. Whatever the definition, the rural aspect of Cheshire East is significant in terms of population, economic impact and its contribution to the borough's quality of place. The conservation of our rural environment and support for the rural economy are key components of the Economic Strategy. An Environment Strategy along with related plans for green infrastructure, air quality and landscape will help set the direction for environmental protection, stewardship and enhancement of the Borough. Alongside the Economic Strategy, it will help to define how Cheshire East will build on its strengths to deliver quality of place and support a healthy, prosperous and sustainable community.

The Rural Environment

By the rural nature of Cheshire East there is an underlying value in the land-based and agri-food sectors to both the economy and the character of the place. The rural

character can also be a differentiator, being a real attractor for high value businesses and offering distinctive venues in the business tourism market as well. The borough has a diverse and highly attractive landscape that provides Cheshire East with its own unique character and identity as well as rural communities, which are equally vital to the wider economy and local identity. The conservation and enhancement of the rural environment is extremely important, to ensure the wider contribution to Cheshire East's quality of place as an economic driver.

Rural Economy

Land management industries are important to Cheshire but the economy in rural areas reaches far beyond this in terms of jobs, enterprises and output. As well as traditional large scale dairy and land-based enterprises, the rural economy supports a diverse range of business sectors including tourism, creative and digital, distribution, science and technology. The rural areas are now home to a wide range of non land based businesses that appreciate the rural setting, including strategic employment sites such as Alderley Park, Radbroke Hall, Waters (Wilmslow) and Jodrell Bank. Self-employment in the rural area (at 14.2%) is higher than in urban areas and higher than the national average and the area supports a diverse economy of SME's and micro businesses.

Connectivity

While a strength in many respects, the rural economy also has its challenges, particularly in relation to accessing the workforce, transport connections, digital connectivity and mobile phone coverage.

Business Sectors

Beyond the strategic sites, agri-food and the visitor economy remain the most visibly significant rural based sectors, but with the development of high-speed broadband coverage, professional, knowledge based, creative and digital businesses are also important. The agri-food sector in Cheshire East is well developed and diverse with a range of companies from large scale food manufacturers and animal feed businesses, to dairy operators, salad producers and small scale operations (including traditional cheese producers, farm shops, breweries and distilleries). Cheshire East's food and drink sector is recognised by the Cheshire and Warrington Local Enterprise Partnership (LEP) and identified through the Northern Powerhouse Independent Economic Review as having growth potential for Cheshire and Warrington. The rural tourism offer (and its related heritage) is a very important component of our visitor economy. Although representing a relatively small portion of the district's economic output (in terms of GVA), they both employ a high number of people and are important to the character of the area. The 'Science Corridor' in Cheshire East has many businesses based in rural locations with particular strengths

in advanced scientific analysis and research, pharmaceuticals R&D, energy and radio-astronomy and astronomy.

The Cheshire Brand

Traditional land based businesses, the wider countryside, its rural tourism assets and events form an important part of the 'Cheshire' brand, adding to 'quality of place' and helping to define the character that supports many locational decisions by business, visitors and residents.

Action: Deliver the Rural Action Plan to help inform strategic choices as part of meeting the Council's strategic outcomes and identify priorities regarding the rural area. The plan will address priority actions related to connectivity, economy, communities and environment.

Action: Deliver an Environment Strategy, along with related plans, such as for green Infrastructure, air quality and landscape, will help set the direction for environmental protection, stewardship and enhancement of the borough. Alongside the Economic Strategy it will help to define how Cheshire East will build on its strengths to deliver 'quality of place' and support a healthy, prosperous and sustainable community.

6. PRIORITY THEME 2 – ‘The Place to connect’

Cheshire East is one of the best connected areas in the UK sitting at the heart of key arterial road and rail routes and within easy reach of three international airports and the Port of Liverpool. The M6 runs along the western side of the Borough, connecting the area to Staffordshire, Birmingham and the rest of the West Midlands conurbation, Lancashire and Cumbria, whilst the M56 provides access to Greater Manchester, Merseyside and North Wales. In terms of travel by train, Macclesfield and Crewe are at the hub of the North West rail network. The West Coast Mainline Service is the main arterial link between England, Wales and Scotland with more than 40 trains from Crewe to London each day and a travel time of 90 minutes. Opportunities for international travel and trade are enhanced by the area’s proximity to two major airports; Manchester Airport (the UK’s busiest outside London) and Liverpool John Lennon Airport. Businesses in the sub-region also have access to good quality maritime trade links via the Port of Liverpool and the Manchester Ship Canal.

Historic transport routes crisscross the borough in the form of canals, railways and historic roadways, further enriching the built heritage of the borough and influencing aspects of the townscape and development of towns and villages. A number of landmark structures are associated with the canals and railways, not least the viaducts across the Dane Valley to the east of Holmes Chapel and at Bollington. Many canal structures are listed, including bridges, locks and mileposts. The Trent and Mersey and Macclesfield canals are both designated as extensive, linear conservation areas. There is the opportunity to secure transformational benefits from significant new national investment especially the new High Speed rail network and Northern Powerhouse Rail. HS2 and HS3 will only cement this connectivity advantage by providing further north-south and east-west links.

However, the road network is already demonstrating reduced resilience while rail travel is hampered by a disjointed and complex network. Major upgrades are required to support productivity growth in the future coordinated with local growth priorities and housing development. Furthermore, the Northern Powerhouse Strategy presents connectivity in the North as a barrier to growth as commuting between towns and cities is constrained by the transport structure available holding back growth and productivity. Progress has been made in identifying the transport infrastructure required to support the growth aspirations of the sub-region through transport studies and the Cheshire East Local Transport Plan (LTP) considers the connectivity required at all spatial scales and interconnections and sets out the Council’s approach to investment in transport and infrastructure between 2018 and 2023.

Strategic Objective 4 – Capitalise on the growth opportunity of HS2

The rail network is accessible from 22 railway stations across the borough. Crewe and Macclesfield are on separate branches of the West Coast Main Line, giving access to Greater Manchester and London Euston. Central government has announced plans for a High Speed 2 rail route from London, through the borough and up to Manchester and beyond. The initial preferred route from the Department for Transport follows the West Coast Main Line, via Crewe, before passing to the west of Middlewich and through the High Legh area before splitting, with a line going north over the M56 to Manchester Airport and a separate line towards Wigan. Cheshire East Council is supportive of the economic impacts of High Speed Rail but is working with Government to keep environmental impacts to a minimum.

Whilst HS2 is a fantastic engineering project we see it as a more of a strategic growth project. The legacy of HS2 is not the railway and a station but the sustainable good growth and social benefits associated to it. For us it's less about shorter journey times and more about changing places and improving people's lives.

In the longer term, the arrival of HS2 in Crewe will transform connectivity; when Phase 2 opens in 2033 Crewe is expected to be the busiest HS2 station on the network. This will not only make Crewe and Macclesfield attractive bases for businesses and residents but also bring improvements to regional rail and bus services with it. HS2 will also be a catalyst for the regeneration of Crewe and the wider area and Master planning for Crewe and Macclesfield is ongoing.

The Constellation Partnership

We cannot work in isolation. Working in collaboration is vital and we have formed strategic partnerships to develop a clear narrative on how HS2 can support growth, not just in Crewe, not just in Cheshire East but across the whole of the Region. The Constellation Partnership is a ground-breaking alliance of 7 major local authorities and 2 Local Enterprise Partnerships described as 'the place where everything connects'. The geography includes four HS2 hubs (Crewe, Stoke, Stafford and Macclesfield) to form one of the largest and most vibrant economic areas linking the Northern Powerhouse to the Midlands Engine. The Partnership's Growth Strategy aims to capitalise on the arrival of HS2, building on existing infrastructure development to unlock development and drive growth across neighbouring economies and connecting the Northern Powerhouse to the Midlands Engine. This should help to deliver at least 120,000 new jobs and 100,000 new homes with £6 bn of GVA by 2040 across the partnership area and a 10-year delivery plan is being developed identifying priorities, including the Crewe HS2 enhanced station.

Strong leadership

We have created a strategic vision for how HS2 can support growth, developing a business case and leading an integrated programme between the Council, Network rail, HS2 and DfT. It is important to get the planning policy right to deliver the changes we want, engaging with local businesses and residents to discuss their concerns and to outline the benefits. We are actively engaged with the west coast partnership potential franchisees recognising their role in the future HS2 solution and we are working with DfT, HS2 and Network Rail. We are working effectively together to deliver the right rail solution with a shared vision for growth.

Delivering Good Growth

HS2 is the key to unlocking broader programmes for transport and housing to create 'The Place'. HS2 will deliver a step change in travel times, transforming access to labour, jobs, and housing markets, boosting skills, and increasing rail capacity for local services and freight. There is a shared ambition to deliver 'good growth' with a focus on quality of place; delivering sustainable communities with a choice of good quality housing providing a high quality living alternative to Manchester or Birmingham with all the connectivity benefits of a major city; reducing car journeys and supporting Integration with the local transport network; multi-modal onward travel, cycling and walking routes to improve 'the last mile'.

Investment in Crewe

Investment in Crewe is building on a firm foundation. The last investment in Crewe of this size was in the Victorian era. Generations later with a pedigree of innovation in R&D and engineering behind it, Crewe is well placed to capitalise on the new opportunities that HS2 can deliver. We believe the HS2 at Crewe will see the town become one of the best connected places in the UK delivering enhanced rail connectivity between Wales, Manchester, Midlands and the North.

In addition to this step-change in connectivity HS2, will offer an attractive location for new investment and businesses; 55 minutes from London and 20 minutes from both Manchester and Birmingham. We recognise the importance of the Crewe Hub in a post Brexit world in creating the infrastructure that connects a vibrant economic area with the rest of the world; capitalising on Crewe's high speed links to GM, Manchester Airport, London, Birmingham. We are however not waiting for HS2 to arrive. Building on the positive market sentiment we are already working on delivering town centre improvements getting Crewe 'HS2 ready'. The Council is delivering an ambitious programme of major schemes and upgrades and has secured significant contributions from Central Government. We have a town centre regeneration plan for Crewe town centre underway and have recently secured a development partner to deliver a £40m leisure led scheme in the heart of the town centre.

Investment in new enabling infrastructure

Infrastructure development is essential for economic growth, 6% of GDP originates from construction, and 9% of the workforce is employed in this industry (Office for National Statistics 2016). A programme of over £300 million of new highways infrastructure to be delivered in Cheshire East to compliment the growth associated with the arrival of HS2, support the expansion of local businesses and commercial development opportunities, creating jobs and opening up strategic housing sites. Major schemes include Congleton Link Road which will unlock around 2,200 new homes and 20 ha of employment land while removing heavy through traffic from the town centre; Middlewich Eastern Bypass which is expected to deliver 1,950 new homes and 6,500 new jobs through land release; and the A500 duelling will remove a major pinch point at Junction 16, improve connectivity and ensure smooth passage for HS2 construction traffic. All three schemes are expected to be delivered over the next 3 to 4 years, easing serious congestion points and supporting economic growth. The North West Crewe Package identifies 2 development sites which offer the provision for 1,350 homes and a new local neighbourhood hub plus 5 ha of employment land supporting future development and significantly enhancing connectivity to HS2 from surrounding areas.

Action: Develop Station Delivery Plans for rail hub stations at Crewe, Macclesfield and Manchester Airport.

Action: Deliver an Area Action Plan for Crewe Hub Station.

Action: Deliver a programme of key infrastructure development to support the growth associated with HS2 and be better coordinated with housing and skills development.

Strategic Objective 5 – Improve connectivity options, efficiency and sustainability

The economic performance of the Borough is closely linked to the ease of access and transport links connecting Cheshire East to the wider region, national centres and the global economy via international hubs. The quality and availability of the transport network connecting places and people and providing access to markets, services, education, employment and leisure is therefore of great significance to productivity.

Good connectivity will help us to increase productivity and improve access to centres of employment. It can improve access to markets, increasing the pool of workers available to work in higher productivity urban locations and connect our employment sites both around the borough and with our neighbours. The integration of different transport modes has the ability to increase efficiency and sustainability. A lack of

integration between transport services results in significant increases in journey time and thus discourages greater use of bus and rail services. Connectivity also needs to take account of alternative modes of 'active' travel including walking and cycling.

In a recent business survey the most commonly cited disadvantage of being located in Cheshire East was traffic congestion (14%) followed by inadequate broadband coverage (7%) and dissatisfaction with broadband coverage is more prevalent in rural areas (20% as opposed to 7% in urban areas).⁵ There is therefore a need to invest in transport services, infrastructure and maintenance; the transport network must get people and goods to where they need to be efficiently and sustainably and we need to find solutions to create and improve digital infrastructure across the whole Borough.

Manchester Airport

Manchester Airport sits on the northern border of the borough with parts located within the Borough. Cheshire East therefore benefits from close access to the worldwide air services that it offers. Passenger numbers continue to grow with more than 28.2 million passing through in 2018 as the airport celebrated its 80th birthday, progressed work on a £1bn transformation and added further long-haul connectivity with routes to Seattle, Mumbai and Addis Ababa. Cheshire East Council will continue to look to maximise the access to the airport for our residents and businesses by road and rail and work with Manchester Airport and Greater Manchester to support growth for Cheshire East as the airport undertakes its investment programme. However, whilst this growth provides opportunities for businesses and visitors, this should be balanced with environmental considerations.

SEMMS

The Council is working with partners on refreshing the South East Manchester Multi-Modal Study (SEMMS) which was originally published in 2001. This refresh is linked to Airport City, Northern Powerhouse Rail/HS3 and the Greater Manchester Spatial Framework and will also have an impact on the sub-region promoting further growth. The SEMMS refresh is needed to take account of what has been achieved since the strategy was first published and to take account of significant planned growth both in the borough and across south Manchester. The 20-year strategy will be developed to deal with existing and predicted transport problems in the area.

Carbon management

The biggest contributor to climate change and air pollution within Cheshire East is road transport. Macclesfield, Knutsford and Wilmslow have the highest emissions

⁵ Cheshire Business Survey 2017

from road transport in the borough. This is indicative of a very car dominated area and low public transport use relative to other areas; 43% of households in Cheshire East have 2 or more cars against a UK average of 32%. This will be increasingly important considering an expected 16% growth in population over the Local Plan period (2010-30). Although significant activity to decarbonise will be led nationally, we have a role to play in aiming to minimise the carbon intensity of our growth ambitions.

Digital connectivity

Digital connectivity can have an impact upon business productivity, opportunities to trade, choices of where people live and social mobility. Since 2010, Cheshire East has led the Connecting Cheshire programme to deliver broadband infrastructure to the sub-region, addressing the many areas that were not priority – or commercial – to operators. This has helped us achieve 95% superfast broadband coverage (with speeds >24mbps), with take-up rates being in the top ten nationally, due to delivery of awareness campaigns and appropriate digital skills training. However, with increasing technological advances and demand for more data there is growing demand for gigabit (full fibre) capability where the UK has low coverage compared to other EU countries. A new government target to achieve 100% full fibre ultrafast technology (with speeds >1000mbps) by 2033 has already been set, and this reflects government's view that digital connectivity and the infrastructure necessary to make it happen is central to the future of the UK economy. Cheshire East's current full fibre coverage position is 3.4%. The new broadband target illustrates the pace of change we can expect from the telecoms sector over the coming years, and it's a similar picture with mobile communications. A report by Rural England has found that a third of rural households are unable to make a mobile phone call indoors and more than half unable to access 4G mobile networks. Government's target of 5G for the majority of the population by 2027 seems ambitious to those in such areas, and again presents the risk that our remote localities will get left behind. Whilst government's Future Telecoms Infrastructure Review also anticipates a more converged telecoms sector with fixed fibre networks and 5G being complementary, certainly in rural areas, 5G is not likely to be a rural alternative and innovative solutions will be necessary. Government will be promoting competition and commercial investment from the telecoms market where possible, and Cheshire could play a more proactive role to facilitate deployment locally. Government acknowledges there will be geographic pockets that will remain uncommercial to operators, and with the current broadband infrastructure project in Cheshire having ended (in June 2019), this is true across Cheshire. To tackle connectivity 'not-spots', government has announced a new "Rural Gigabit Connectivity" programme which will continue investing in digital infrastructure to targeted public buildings in the immediate term, making surrounding areas commercial to operators, and then immediately adjacent areas viable to residents and business with subsidisation from a government voucher scheme. This intervention is very localised and piecemeal

and local coordination would maximise its impact, as would another local infrastructure programme which could pilot and accelerate further interventions ahead of government's wider 'outside-in' solution for the most remote areas.

Action: Delivery of the Strategic Infrastructure Programme.

Action: Effective Management of the Highway Network.

Action: Promoting and supporting Rural and Public Transport.

Action: Delivery of active travel plans through the cycling strategy, rights of way improvement plan and management of the related networks.

Action: Promoting sustainable transport options through the energy efficiency, clean growth innovation, adoption of cleaner smarter technologies and encouraging active travel e.g. Electric Vehicle Charging Points, provision for cycling.

Action: Develop bids /proposals to support Rural and Digital Connectivity and provide digital infrastructure investment to meet the needs of residents and businesses considering fixed line and wired technologies.

Action: Consider strategies to encourage commercial operators to promote innovative solutions including the use of mixed mobile and fixed technologies that will better serve rural communities, including defining a more pro-active digital champion role for the authority and at a sub-regional level.

Action: Support government's rural connectivity programme, identifying areas needing intervention to inform future delivery plans.

Action: Develop bids/proposals for accelerated infrastructure investment to those areas at-risk of being left behind in terms of digital connectivity, and for funds to provide the practical support residents and businesses need to maximise their digitalisation potential.

7. PRIORITY THEME 3 – ‘The Place to work and learn’

Education and skills are key to growth and increasing productivity. Successful local economies need well-functioning local labour markets that are able to effectively match the skills of the local population with the labour requirements of local employers. Stronger alignment of the demand for, and supply of, skills in an area enables businesses to more easily access the talent required to grow while simultaneously enabling more local people to share in the benefits of growth via jobs and wages. Cheshire East has a strong knowledge based economy, which is expected to expand providing the conditions for growth and talent pipeline exist. This growth will be accelerated by the recently secured Enterprise Zone for the Cheshire Science Corridor and the wider economic benefits of the HS2 hub station in Crewe. However, there are some significant challenges relating to skills and employment which threaten to undermine the sub-region’s growth ambitions.

One key challenge in Cheshire East relates to skills in our population. Recent analysis⁶ reports that; a declining workforce and aging population; skills mis-matches with replacement demand; significant commuting flows both in and out of the Borough; health related worklessness; and low pay progression; are all contributing to reduced productivity. Whilst our population is highly qualified, with over 45% holding a level 4 or above qualification, there are parts of the Borough where qualification levels are much lower.⁷ Addressing these challenges is of paramount importance if we are to support our businesses to grow and achieve our ambitious economic target to double the economy.

Strategic Objective 6 – Support residents to improve their skills levels

Supporting residents to improve their skill levels can increase their job prospects and wage levels. There are clear concentrations of worklessness linking to low skills. The most deep rooted labour market challenges occur in the urban areas of Crewe and Macclesfield where some Lower Layer Super Output Areas (LSOAs) have over 30% of the working age population claiming out of work benefits. People living in these areas often face multiple barriers to accessing and sustaining employment which not only include a requirement for skills but also relate to health issues, disability, lack of affordable housing, transport, childcare provision or other care responsibilities. There is a need to more effectively align skills provision targeted at this cohort with local

⁶ Cheshire and Warrington SEP refresh March 2018

⁷ Data from the 2011 census

employment opportunities. It has been estimated that improving productivity and pay progression is likely to deliver a fiscal benefit of £2.89 for every £1 spent on it and moving from ESA (employment and support allowance, the benefit which has replaced incapacity benefit) to employment represents a saving of £12,568.

Health related worklessness

Unemployment has negative impacts on physical and mental health and being unemployed with a health problem carries a cost for both the individual and society. The Government's Green Paper on Health and Work focuses on support for severely disadvantaged groups to find/return to work. Having any sort of health issue or disability is a barrier to employment, but some have greater impact than others; Individuals with disabilities are less likely to be employed than those with a health condition, but people with mental health issues, and particularly those severe enough to be in secondary care, have the lowest rates of employment. A successful approach to health related worklessness will need to provide services that meet the needs of a range of individuals and needs. It will also need to work with employers to improve opportunities for work.

Low pay progression

Improving progression from low pay will mean either helping people to leave problem sectors or helping firms in those sectors to shift onto a higher value strategy. A sub-regional programme of activity has been developed to tackle the issues of worklessness and low pay progression, the Cheshire and Warrington Public Sector Transformation Programme. There is a huge amount of positive work happening across the sub-region and this approach focuses on collaboration, integration and efficiency to add value. Over £1m of innovation funding has already been secured for the area and further bids for supported employment provision are in process.

Young people

It is important for young people to have the opportunity to develop skills and pathways into work that showcase talent, creativity and potential and the value of supporting young people to develop practical skills and creative thinking has been recognised. Higher volumes of high quality degree level vocational activity should be delivered through local further education providers, including the development of infrastructure to deliver degree level apprenticeships. The 2018 Cheshire East annual 'YourSay' survey was completed by circa 800 young people aged 14-24, and the survey reported that 44% of young people did not receive sufficient information about apprenticeships and 61% did not receive sufficient information about the local labour market.

Apprenticeship growth

Cheshire East performs relatively well in terms of the number of apprentice starts in the area but the Government has set a high growth target of 3 million which is indicative of higher growth. There were nearly 7,000 apprentices in Cheshire East in 17/18, with almost half being new starts in that year. The four largest participation levels were in; Business, Administration and Law (24%); Health, Public Services and Care (24%); Retail and Commercial Enterprise (16%); and Engineering and Manufacturing Technologies (15%). Nationally, overall starts have declined between 16/17 and 17/18 by -24% and regionally by -27%, and although this is reflected in Cheshire East our overall starts decline is only -20%. The Apprenticeship Levy was introduced to encourage businesses to participate in apprenticeship programmes but the circa 150 levy paying businesses based in Cheshire East need to be supported to maximise spend and impact on their skills levels of their workforce. Levy paying employers can also now transfer up to 25% of their levy to non levy businesses to further support apprenticeship growth and opportunities.

T-Levels

T-Levels are new two-year level 3 technical programmes that will sit alongside apprenticeships and A Levels within a reformed skills training system, primarily aimed at 16-18 learners. The introduction of T-Levels aims to streamline technical education and focus on developing skills that sit within 15 industry routes. The first T-Levels will be introduced in September 2020 with full roll-out intended by September 2024. Currently, no Cheshire East schools or colleges are registered to be part of the first wave of T-Levels, one of the challenges being the requirement for extended placements.

STEM skills

The supply of STEM (science, technology, engineering and maths) and ICT skills are critical to the success of our key sectors and strategic initiatives e.g. the Science Corridor and HS2. Increasing the volume of STEM skills and transferable creative and digital skills secured by young people will have a positive impact on productivity levels and help to underpin the wider economy. In Cheshire East between 2016/17 and 2017/18, there was a decrease in apprenticeships of 2% in STEM subjects. However, whereas Engineering reported a drop of 15%, in contrast ICT grew by 38%.

Graduate retention

Of the 5,000 Cheshire and Warrington young people who secure University places each year, only a small proportion return to Cheshire east following their graduation. An attractive high quality Higher Education provision linked to local employment opportunities is paramount to strengthening our ability to attract and retain graduates

and young professionals, including provision of degree and higher level apprenticeships and a stronger virtual higher education offer across the Borough.

Action: Continue to drive forward the Public Sector Transformation Programme of activity to address the issues of worklessness and low pay progression across the Borough.

Action: Build local skills provision, career inspiration, work experience and apprenticeships into planning and procurement policies to ensure that investment in housing, commercial development and infrastructure is accompanied by funded employment and skills plans e.g. through Section 106 or Community Infrastructure Levy (CIL) within the planning process.

Action: Develop a programme of graduate placements, work experience and Apprenticeships for Cheshire East Council.

Action: Continue to support skills and education through libraries and culture provision and Life Long Learning.

Strategic Objective 7 - Ensure education provision meets employer demand

Our businesses continue to report they cannot source the skills that they need and that the skills system could be more responsive to these needs, particularly in terms of wider employability skills which currently sit outside mainstream funded provision. To support our businesses to thrive they require a strong and sustainable pipeline of talent, which responds to existing and future skills demands. We must ensure that young people, their parents and teachers fully understand the labour market opportunities available to them, and make education and training choices which provide the best opportunity to secure a sustainable and fulfilling career.

To fulfil our growth ambitions, the existing workforce is estimated to need to increase by 25% which will have a corresponding requirement for an increase in further education capacity by 25%, or at least have the capacity to grow to this level. Stronger alignment of the demand for and supply of, skills in an area enables businesses to more easily access the talent required to grow while simultaneously enabling more local people to share in the benefits of growth via jobs and wages.

Skills gaps

In Cheshire East whilst 45% of our residents are educated to degree level, there is a recognised mismatch between the skills and education demanded by young people and adults and the skills and education needs of employers. In a recent business survey, 45% of businesses experienced recruitment difficulties and 83% cited skills as an issue. A significant proportion of employers require digital and Science,

Technology, Engineering and Maths or “STEM” skills yet we have relatively small numbers of people studying these subjects or taking up apprenticeships in these areas. This is of major concern as it is the employers in these particular sectors which tend to support the higher value jobs and are expected to experience high growth in the future and increase productivity.

Importing labour

Data from the last two Censuses shows that Cheshire East has shifted from being a net exporter of labour to an overall net importer. The most recent (2011) Census shows a net inflow of 25-34 year-olds which when coupled with a decrease in 25 to 34-year olds as a proportion of total population within Cheshire East, suggests that workers in this age range are not living within the Borough. However, there is some outflow of workers within this age implying that skills gaps are also an issue for this age range.

Careers information

Key to addressing this mismatch will be improving the quality of and access to education provision and putting employers at the forefront of inspiring and informing young people about new technologies and career opportunities so that they demand the appropriate training and education from providers. There is concern across the Borough that the quality of work experience and careers education, information, advice and guidance (CEIAG) is variable and is not always aligned to local labour market opportunities, career pathways and apprenticeships. Only by integrating the relationship between schools and local businesses will young people, parents/carers and teachers be truly aware of the variety and quality of careers opportunities available to young people in the Borough.

Enterprise Adviser Network (EAN)

Operated and part funded by the national Careers & Enterprise Company, the Cheshire East network was established in 2017 and connects secondary schools and colleges with employers and careers programme providers and supports them to work together to provide young people with effective and high quality encounters with the world of work. The Cheshire East Enterprise Coordinator supports a group of senior business volunteers, (Enterprise Advisers), who are matched with a school or college in the network. The EAN supports schools and colleges to meet the new Gatsby Benchmark framework of 8 guidelines that define the best careers provision underpinned by local employer encounters.

Providers

Whilst encouraging young people to take up careers suited to our employers’ needs it is equally important to support providers in understanding the skills requirements

across key sectors and collaborating effectively with employers to co design provision and projects accordingly. Local labour market information is now a feature of the new Ofsted Framework.

Sectors

Replacement demand from an ageing population is expected to be one of the main drivers of future labour requirements at circa 90,000 jobs by 2025, therefore it is important to increase the attractiveness and visibility of those sectors with an ageing demographic. This is a particular challenge for the following sectors; manufacturing, public administration, education and health and transport and communication. Work to support this is ongoing with the development of sectoral employer skills groups such as the Transport Infrastructure Board (rail, engineering and construction) and the establishment of the Crewe Engineering and Design University Technical College supporting the advanced manufacturing sector. Further opportunities to develop new quality higher education offers linked to the needs of our key sectors include developing a Sector Deal for Cheshire for one or more of our high growth sectors such as Life Sciences or Visitor Economy for example and creating a Virtual Institute of Technology network to address the skills needs of local businesses.

Sub-Regional Programmes

The Cheshire and Warrington LEP is leading on a number of projects to address skills issues across the sub-region. The Virtual Institute of Technology is using £14 million from the European Social Fund (ESF) to develop and deliver training packages bespoke to employers needs across C&W based on Science, Technology, Engineering and Maths (STEM) skills. £100,000 of funding has been identified from New Horizons and the Government's Careers and Enterprise Company to extend the existing capacity in Cheshire East with an additional team of Enterprise Co-ordinators working with secondary schools across the sub-region, and the Local Growth Fund has allocated £5 million to invest in capital equipment to support STEM related skills development.

Skills Advisory Panel

Skills Advisory Panels are being set up by the Government to help LEPs in understanding the current and future skills needs and labour market challenges for their areas locally. Government guidance suggests that Skills Advisory Panels will be local partnerships aiming to strengthen the link between public and private sector employers, local authorities, colleges and universities and that local authorities should be included in the panel. In Cheshire and Warrington the existing Education and Skills Board will transition into a SAP and the LEP is currently reviewing and amending the structures, membership and powers to align to Government's SAP remit.

The Pledge Partnership

This model was developed here in Cheshire East through a local partnership and is now to be rolled out across the sub-region through a £1.1 million European Social Fund (ESF) project. The initiative supports young people in identifying and working towards their career ambitions and meeting local skills needs.

Action: *Work in close partnership with the LEP and other partners and providers on the development of skills strategy and programmes to ensure that the skills needs and priorities of Cheshire East employers and residents are recognised, acknowledged and supported.*

Action: *Ensure that Cheshire East is represented on the Board of the sub-regional Skills Advisory Panel to influence local skills strategy, activity and investment planning and operation.*

Action: *Support the LEP to develop a Local Digital Skills Partnership to bring together public, private and charity sector organisations to boost skills for a world-leading, inclusive digital economy, and to guarantee Cheshire East has appropriate representation on the Board to ensure our priorities are reflected and addressed.*

Action: *Work alongside the sub-regional Skills and Pledge team in order to enhance the careers service support to schools.*

8. PRIORITY THEME 4 – ‘The Place to invest’

With a great location at the heart of the UK, outstanding connectivity and high quality living and working environments, it is no surprise that Cheshire East is a favoured location for many businesses. Companies that have already chosen to make their here include Bentley Motors Ltd, Astra Zeneca, Siemens, the Square Kilometre Array Organisation, Barclays Technology Centre and The Waters Corporation; their presence underpins key sectors.

The economic base in the Borough is diverse; principal contributions to GVA are production activities such as advanced manufacturing including automotive (4,000 jobs) and pharmaceuticals (3,000 jobs) and software development (1,250 jobs). Our business density is high compared to the UK, North West and our neighbouring authorities with 20,230 businesses within the Borough. More businesses are being created than closing and the number of jobs created continues to rise.

The following ‘growth sectors’ are the key economic areas where the evidence shows particular economic strengths in Cheshire East (in terms of employment size, level of specialisation or business presence), or areas with clear potential for future growth.

Life Science and Pharma Sector

Cheshire East has particular strengths in advanced scientific research and in pharmaceuticals R&D and manufacturing. AstraZeneca, Recipharm (formerly Sanofi), Waters Corporation and the BioHub at Alderley Park, are some examples of important businesses in these sectors. Cheshire East hosts an estimated 20.0% of the region’s and 1.6% of the UK’s scientific R&D jobs which account for 1.0% (2,000) of the Borough’s jobs; an employment share which is 2.5 times higher than the sector’s share in Great Britain as a whole (0.4%). The pharmaceutical production sector is even stronger hosting an estimated 37.5% of the region’s and 7.7% of the UK’s jobs, an employment share (1.5%) which is 15 times higher than the sector’s share in Great Britain as a whole (0.1%). CRO (Contract Research Organisations) are an integral part of the pharmaceutical, biotechnology and medical device industries. These independent research businesses are a key growth area and Cheshire East is home to 25 including Cyprotex, the world’s largest CRO specialising in ADME Tox and bioscience services, with its headquarters in Macclesfield and labs at the Alderley Park BioHub.

Advanced Manufacturing

Manufacturing continues to be an important sector to Cheshire East supporting around 23,000 jobs within the Borough with nationally significant contributions of activity particularly in the automotive sector and its supply chain. Manufacturing growth is clearly demonstrated by Bentley Motors' growth programme and growth of an advanced manufacturing cluster including Autoliv, Siemens, Oliver Valves & BAE Systems. Instrumentation is another growing niche sub-sector. Digital technologies such as additive manufacturing, data analytics, 'the internet of things' (the extension of internet connectivity into physical devices and everyday objects), augmented and virtual reality are transforming manufacturing operations and improving productivity and there is growth potential in the application of these technologies within small and medium sized businesses.

Creative & Digital

Whilst Cheshire East has well established strengths in areas such as life sciences and manufacturing, one of the fastest growing sectors is creative and digital industries. At the heart of the North's creative cluster, the Borough is home to over 2,000 companies employing around 7,500 people and generating a turnover in excess of £500 million a year. There are an estimated 1,250 jobs in software development with specialisms in gaming particularly. Although most are small businesses, there are a number of leading firms including Warner Bros owned TT Fusion makers of Lego Games in Wilmslow; Cloud Imperium Games in Wilmslow; ThinkPositive's European Design Centre in Bollington; and McCann in Prestbury, the largest advertising agency outside London. It's viewed by the council as a key sector in terms of supporting growth and prosperity across the whole of its patch, particularly for rural areas. The Creative & Digital sector is also increasingly important to support other areas of the economy, including advanced manufacturing, life sciences and research, and financial technology or 'fintech'. There is a particular strength in Medical Communications Agencies including; Ashfield Healthcare, McCann Health, Adelphi Group, Fishawack Group, Healthcare21 and Prime Global for example; and Cheshire East has significant financial technology companies such as Barclays Global Technology Centre in Knutsford, Fujitsu, Assurant, Royal London, Atos Origin and rapidly expanding Radius Payments Solutions, Quintessential Finance Group and Mobicca employing around 5,000 skilled staff. The Creative and Digital sector is clearly growing but could be further enhanced through the development of wider networks, support systems and skills that provide the 'creative ecology' needed.

Agri-tech

The productivity of traditional sectors in food and agriculture has been transformed by technology through agri-tech initiatives and food chain innovations. Cheshire East

has a strong agri-food sector, employing 7,500 workers (4% of all jobs in the Borough). Roughly two-thirds of these jobs are in agricultural activities which have a high level of specialisation and a share of employment that is 1.7 times higher than Great Britain. Moreover, the sector is growing in Cheshire East, contradicting the negative national growth trend. Manufacture of food is less specialised, but still above national average and employs 2,500 jobs indicating the presence of local supply chains in the broader agri-food industry. There are opportunities for growth in these activities, for instance developing automation and agri-tech (to increase productivity) or exploring synergies with the visitor economy recognised by engagement with the Agri-Tech West Alliance. The sector is also important for the preservation of landscape and the natural environment, to sustain the rural economy and to maintain the local identity of the place.

Transport and Logistics

Transport and Logistics is a large sector in Cheshire East, employing around 9,000 workers. Warehousing and road transport of freight are the two largest sectors, employing 3,000 to 4,000 jobs each and with high levels of specialisation. The employment share in the road transport of freight sector is about twice the Great Britain average. Transport of freight by rail is smaller in employment but is a sector of great concentration in Cheshire East. Transport and Logistics is a strategic sector for Cheshire East, given its geographical location (proximity to Greater Manchester and gateway to the Midlands), the forthcoming HS2 hub station in Crewe, and the future economic potential of this sector in growing higher value and skilled jobs related to automation and digital solutions. There might be further opportunities from HS2 related to engineering and construction, with the Borough already being home to major employers including Atkins, AECOM, Arup, CH2M Hill, Mott MacDonald, Bombardier, Unipart Rail Keltbray, Virgin Rail.

Visitor Economy

The visitor economy sectors⁸ employ a very large number of workers (just under 20,000) which represents 10% of total employment in Cheshire East, making it an important area of activity. More than half of jobs in the visitor economy sectors are concentrated in food and beverage service activities (which includes pubs, restaurants, cafes, etc.). However, the most specialised sector is accommodation, which has also a high concentration of jobs (4,000). Both these sectors experienced significant job growth over the past 5 years. This means that, despite not being yet a clear area of strength in the Borough, there is potential to continue to grow the local visitor economy. This is also a strategically important sector for its potential to

⁸ Visitor economy is defined as a broad sector including accommodation (e.g. hotels), food and beverage services (e.g. bars and restaurants) and activities related to tourism and leisure (e.g. sports and recreation activities, travel agencies, etc).

contribute to the sustainability of the rural economy and to generate positive economic effects on place marketing and promoting inward investment.

Clean Growth/Low Carbon

The UK Industrial Strategy predicts that the clean growth/low carbon economy is estimated to grow by 11 per cent per year through to 2030 (four times faster than the rest of the economy) and could deliver between £60 billion and £170 billion of export sales of goods and services by 2030. The sector in Cheshire East is sizable with over 5,000 employees and £0.5bn in sales as far back as 2011. The Council will support the further development of this sector, working with the Local Enterprise Partnership to deliver the Energy Strategy and clean growth aspects of the Local Industrial Strategy, supporting innovation by all businesses, promoting energy and climate resilience, and accelerating market development of energy and low carbon technologies such as heat and power networks and smart technologies. This will help to realise an ambition to create a competitive and sustainable economy while reducing rather than increasing overall carbon emissions.

Strategic Objective 8 – Strengthen business support, particularly for the growth sectors

Business support is an important mechanism to boost productivity and business resilience by providing companies (particularly SMEs) with the funding and expertise they need to improve efficiency and business practices, adopt automation and digital solutions, innovate and develop new products for higher-value markets, develop the appropriate skills and adjust to a higher-value and higher-pay economy. It is also increasingly relevant in the context of Exit from the EU, with companies requiring adequate support to address new administrative challenges and costs, particularly for small companies highly exposed to trade and EU workforce.

Funded business support across the UK remains limited and whilst information is still available on line through a range websites and some basic triage services, feedback from the business community tells us that they experience confusion and difficulty in accessing appropriate and most importantly impartial business support solutions so that only a small proportion of businesses, particularly from the SME community, have accessed any type of business support.

Support should not just cover advice and access to finance. The 2017 Cheshire Business Survey found that 16% of our businesses are likely to relocate within the next 5 years and 50% of those are looking for larger premises. The lack of premises and good quality sites is an issue not only for inward investors but for our indigenous medium sized high growth companies that are looking to grow. This is particularly prevalent in the North of the Borough where there is competition from our neighbouring authorities.

Top 100 Strategic Investors

Cheshire East's successful economic performance is due, in large part, to the presence of several very large, high GVA producing businesses. These 'strategic investors' need high quality 'account management' to ensure risk of disinvestment is reduced and new investment propositions are supported and we continue to develop the capability to provide high quality account management to our strategic investors.

High Growth SMEs

Smaller companies are statistically less likely to engage with support programmes and can be focussed on survival rather than development. Over 99.7% of our businesses are classified as small to medium sized enterprises; they are the backbone of our economy and a significant number have the potential for high growth. We continue to develop targeted support to boost business investment and productivity of the borough's high growth potential SMEs.

Target Sectors

Whilst a broad approach to business growth and support is needed for all SMEs, research and intelligence suggests that targeted support at growth sectors is more likely to generate increased Gross Value Added and productivity. We have defined the 'growth sectors' for Cheshire East in terms of employment size, level of specialisation or business presence.

Action: To work with business-facing organisations such as The Cheshire & Warrington Business Growth Hub and Chambers of Commerce to provide a range of business support services and continue to develop the capability to engage and account manage our key companies and high growth SME's.

Action: Provide appropriate support and advice to help local businesses to prepare for EU Exit; to include help with access to finance for the administrative costs of implementing new trade arrangements, compliance with new standards and regulations and other potential new legal requirements, legal advice and support administrative costs of recruiting new EU citizens and reviewing the legal status of their current workers.

Action: Continue to develop the legacy of the SHIFT programme (a pilot digital innovation and creative thinking initiative from 2016-18), by working with others to develop flexible work space and maker spaces in Macclesfield and Crewe to support the sector, promoting the sector to further raise the profile of Cheshire East as a creative and digital hub and further develop skills through identifying Digital Ambassadors.

Action: Develop a programme to support productivity improvements in the Cheshire East growth sectors which have traditionally lower productivity levels (Agri-food, Visitor economy and Transport & logistics). This should include support for businesses (mainly SMEs) to access expert advice and appropriate funds to become more productive so they are prepared to adjust to economic change and to contribute to a higher-value and higher-pay economy.

Strategic Objective 9 – Deliver and grow the Cheshire East Science Corridor

The North West region has one of the strongest science and technology clusters in the UK and complementing the ‘golden triangle’ of Oxford, Cambridge and London is a Northern hub centred around the Cheshire Science Corridor. Cheshire East sits at the heart of it with some of the most significant science and innovation assets in the world. Collectively these assets form the North East Cheshire Science Corridor which with other science hubs across the sub-region forms the strategic priority of the Cheshire Science Corridor.

The Greater Manchester and Cheshire Life Sciences Fund is a seed and early stage venture capital fund investing in a range of life science businesses across all stages of development, from initial market research and concept development through to product/services launch and manufacturing. The £42m fund has been created by the Council in partnership with the Greater Manchester Combined Authority, Cheshire and Warrington LEP, and Manchester Science Partnerships. The Fund Manager, Catapult Ventures, has ambitions to increase the size of the fund to c.£60m through further private sector investment, creating one of the UK’s largest early stage life science funds.

The Science Corridor area benefits from Enterprise Zone status which enables businesses relocating to or expanding within the Science Corridor to apply for business rates discounts. Forward fund investment based on future business rate income is possible through an Enterprise Zone Rate Reinvestment Fund which is currently supporting the development of 147,000m² of new office space to deliver an additional £1.2 million in business rates, 1,200 new jobs and a £120m GVA uplift per annum.

Jodrell Bank Centre for Astrophysics

The Jodrell Bank Observatory hosts a number of radio telescopes, and is part of the Jodrell Bank Centre for Astrophysics at the University of Manchester. It has been chosen to host the permanent headquarters for the world’s largest network of radio telescopes, an observatory that aims to delve deep into the early history of the universe; the ‘Square Kilometre Array’ or SKA project to deliver an additional 200 jobs on site. Rather than employing one enormous dish, the SKA will draw on more

than one hundred thousand dishes and antennae spread across Africa and Australia to create a collecting area of one square kilometre. The site is an important piece of our national heritage with many of the structures protected by Historic England as Grade I or II listed building and is currently the UK's nominee for UNESCO World Heritage Site status. The First Light Project at Jodrell bank is a £22.5m project supported by the Heritage Lottery Fund. It will deliver a new visitor facility formalising Jodrell Bank's arts programme and bringing together the arts, digital technology, science heritage and culture. It is estimated to be able to attract an additional 127,000 visitors per year initially rising to 350,000 to 400,000 within the first 3 to 5 years.

Alderley Park

As a major strategic employment site within Cheshire East, Alderley Park is of paramount importance to the local economy and plays a pivotal role in the wider North West science ecosystem. As part of the Cheshire Science Corridor Enterprise Zone it benefits from the opportunities associated to this status. The former Astra Zeneca site was acquired by Manchester Science Parks in 2014 who have implemented a major redevelopment programme to repurpose existing buildings to make them suitable for multi-occupancy and invest in the improvement of key assets to retain the site's world class R&D capabilities. It is anticipated that this investment will secure 7000 jobs on the site. AstraZeneca will continue to retain around 500 staff on the site. Bruntwood and Legal & General Capital are investing £360m of capital, property and intellectual assets to establish a landmark 50:50 partnership to create a new company, Bruntwood SciTech. This will be the UK's largest property platform dedicated to driving science and technology growth in regional cities with a business plan designed to support the creation of more than 20,000 high-value jobs and Alderley Park is one of sites in the joint venture.

BioHub

At the heart of the site is the BioHub incubator which provides high quality lab and office incubation space to life science SMEs and is operated by BioCity, the UK's largest life science incubation business. Since its launch in 2013, the BioHub has become home to over 120 companies employing over 400 people. The key to success of these businesses is the support services provided including providing specialist workspace for growing life science companies, including access to high-end equipment, shared services and training, as well as business advice through its expert network. A new £5m Medicine Technologies Catapult Centre has been established to bring together business with researchers with the aim of helping start-ups bring ideas to market. Location of the AMR (anti-microbial resistance) Centre of Excellence at Alderley Park with an initial £4m investment is part of the global campaign to develop new drugs and antibiotics, discover more effective treatments and anti-infectives and develop new public policy and clinical practice.

Macclesfield Science Opportunity Zone

AstraZeneca currently occupies 100 acres at the Hurdsfield Industrial Estate on the eastern side of Macclesfield, as their second largest global manufacturing operation. 2,500 people are currently employed in activities including pharmaceutical development, manufacturing and packaging of tablets, syringes and other products, and ICT; with a further 500 R&D staff due to relocate from Alderley Park. The site's significance in terms of high value employment and productivity makes it of both local and national importance. The company is currently investing £120m in high-technology manufacturing at the site, securing the future of a unique capability in aseptic manufacture. The site is the home of the \$1bn oncology product, Zoladex, which is supplied to all markets. Products from the site are distributed to 130 global markets and are estimated to account for 1% of the UK's exports.

New Technologies

The Government's Industrial Strategy positively encourages the development of business-led institutions around local expertise, to building on existing clusters where they exist and creating new ones where they are needed. This move to bring sectors and places together would see these institutions located where there are specific sector strengths; building up local trade bodies, creating new educational institutions, making it easier for businesses to access finance and getting a stronger business voice in local government. One of the Grand challenges sets out the opportunity for the use of Artificial Intelligence or AI to support improvements in productivity. Smart technologies to analyse great quantities of data quickly and with higher degree of accuracy are set to transform the prevention, early diagnosis and treatment of chronic diseases by 2030 and there is a whole new industry around AI in healthcare and medical research creating high value skilled science jobs.

Action: Cheshire East Council will continue to work closely with the key businesses, institutions and sites of the Cheshire Science Corridor to understand their needs and challenges and provide administrative and political support as required, to ensure the continuous growth and prosperity of the Corridor, which is a strategic asset for the Borough.

Action: Aim to progress opportunities to develop and establish small business clusters and joint manufacturing facilities for smaller companies.

Strategic Objective 10 – Develop a clear Place Marketing Approach and Inward Investment plan

Cheshire East continues to demonstrate its appeal not only to local enterprises but to nationally recognised occupiers who have chosen to invest in the area by establishing themselves here as part of long-term plans. Investment deals in Cheshire East were consistently high in 2018 in terms of total spend (£69.73 million) and space exchanged (81,269 m²) which, aside from 2017, is the largest total on record since 2010. The retail sector accounted for most of the deals but industrial deals produced the most significant value (£37.39 million and 82% of all investment). The office market is buoyant across the borough with the highest number of deals taking place in the north of the Borough dominated by Alderley Park. Rents are strong reflecting the demand for inward investment and business growth in Cheshire East and the low supply of land and premises, particularly of higher quality based on these levels of take up. High profile developments include:

- Re development and major investment by Alderley Park Limited led by Bruntwood Scitech is set to provide 38,000 m² of laboratories, offices and light manufacturing space; 1,500 m² of retail space, with a café, pub, restaurant, crèche facilities; up to 275 new homes and a 100-bed hotel, amongst other high quality facilities which are intended to contribute £245 million of the economy annually.
- Luxury car manufacturer Bentley, based in Crewe, has produced a masterplan for the long-term development of its headquarters, with £40m investment in a 46,500 m² campus expansion, creating a world-class hub of design and engineering.
- Work commenced on the £16.5m Jodrell Bank extension in 2016 as part of plans to create a global headquarters for the Square Kilometre Array multi-radio telescope project. Plans have been approved to construct a single-storey research and administration building which will be able to hold up to 135 staff.

The Visitor Economy in Cheshire East already provides nearly £1 billion per year economic impact from visitors and plays an important role in raising the profile and attracting inward investment and new residents. Together with a strong narrative for the Borough and its different places, highlighting their distinct characteristics and capitalising on the good quality of life and connectivity to urban areas, this will be key to ensure the Cheshire East is open for business and attractive to new companies and residents.

Ideally Positioned

The borough's location and connectivity is one of its unique selling points. It looks outwards to Manchester, Northern Powerhouse, Midlands Engine, and London. We are fortunate to have strong international connectivity through Manchester Airport, which borders the borough. But a difficulty for Cheshire East is that, unlike a city, it is

not a single place: it is a 'place of places' set within a wider geography. It has a number of propositions, some of which are set in a context with other places outside the Borough and we are in competition. This makes it particularly important to develop a clear vision and a strong strategy for place marketing and inward investment to raise the profile of Cheshire East and its distinctive attributes.

Place Marketing

We are developing a refreshed place marketing offer including a strategic approach to events and branding, building on the place's national and international gateway and recognising that propositions will need to be based on individual places or sector-specific opportunities. As Cheshire East is a 'place of places', marketing will need to draw out the strengths, opportunities and character of each place, the stories and personality relevant to their future or to particular audiences. This will include a clear and deliberate strategy to attract investment, visitors and businesses to the area and align our place-making strategies for regeneration and for rural areas with a successful proposition.

Cultural Offer

This is an important piece of place marketing. It is one of the elements that helps make a place distinctive. Along with the environment of Cheshire East it helps provide an answer to the question, "Why should I invest in this place over another?" A strong cultural offer can attract high-skilled workers and retains graduates, this being a significant pull factor in the location decisions of businesses and particularly creative businesses. We will therefore develop and promote our cultural offer for both residents and local businesses. We will develop our cultural offer for both residents and local businesses and to attract more inward investors, particularly those with higher value jobs. There is a need to revitalise some of our urban areas and to support and develop our rural areas.

Target Markets

Place Marketing will be an important part of our strategy to attract and retain businesses, target age range and skills sets that we need to fulfil our ambitions for growth. The promotion of any proposition has to be followed through by ability to follow-up enquiries and engage with business along with having deliverable, tangible product: the development sites, serviced facilities, connectivity, skills, business engagement, lifestyles and qualities that are in demand. We will work with existing investors addressing indigenous growth, particularly SMEs, through facilitation and business engagement as well as communicating a competitive proposition for Cheshire East, providing marketing collateral to identify opportunities and equip businesses and other organisations to help articulate and promote the proposition.

Action: Cheshire East to develop its free service that enables businesses to access information on commercial sites and independent advice and information to help organisations make considered choices on where they relocate.

Action: Continue to deliver a programme of promotional activity for key investment opportunities and employment sites to encourage and secure new investment from businesses looking to relocate.

Action: Develop a clear narrative about the benefits of Cheshire East as a destination for inward investment and the strengths of our key sectors and places.

Action: Develop a strategy for the acquisition/development of land for commercial employment uses to meet the needs of both inward and indigenous investors to support business growth and job creation linked to infrastructure and housing development.

Action: Develop distinctive investment plans for the different areas of the Borough, with holistic propositions to create desirable places to live, work and invest (e.g. Town Centre Action Plans).

Action: Develop a programme to focus on regeneration, culture and uplift of town centres and high streets across the Borough.

Action: Deliver destination marketing (linked to Visitor Economy Strategy and Destination Management Plan) to support economic outcomes, profile, 'distinctiveness' and positive image.

9. PRIORITY THEME 5 – ‘The Place to visit’

Cheshire East has a successful cultural and visitor economy sector based on its key attractions, including 14 National Trust properties, strategic events programme including RHS Tatton, Rewind Festival, Blue Dot Festival at Jodrell Bank and the Royal Cheshire County Show. As well as its rural offer, cultural assets and an extensive footpath, cycleway and bridleway network, it is also recognised for its strong wedding offer with over 70% of weddings from couples outside of the area. Delivery of rural, cultural & visitor economy activity can also support and add value to the wider proposition, growth initiatives and quality of place, providing a setting for people choosing to live, work and invest in the area.

Cheshire East is a rural and cultural destination that has many unique visitor experiences, with the likes of Jodrell Bank; the most iconic observatory in the world and the UK nominee for ‘World Heritage Site’ status, outdoor adventures in the Peak District National Park, cultural events and great heritage attractions like Quarry Bank and Tatton Park. Cheshire East provides local food offers, luxury hotels set in idyllic locations, award winning spas, historic houses and gardens, cultural and sporting events and outdoor experiences and smaller niche attractions, making this an active, vibrant place to be. It is ideally positioned to support a business tourism and meetings offer that has many distinctive, quality hotels and venues.

Figures for the value of the visitor economy in Cheshire East have again hit new records at £921m. The detailed analysis of the 2017 figures shows a 69.3% increase in the value of the visitor economy to Cheshire East since the Borough came into being in 2009. Overnight stays in 2017 injected over £200m into the economy; an increase of 6.3% on the previous year and an increase of 58.4% since 2009. Overall these figures show a slow down in visitor numbers, although more people are staying overnight than ever before meaning visitors to Cheshire East are spending more time and money in the Borough. 2017 figures also showed that 11,557 people were employed within the visitor economy sector in Cheshire East; this figure has grown consistently and since 2009 shows a growth rate of over 34.2%⁹. With continuing investment in the Borough’s heritage attractions and with HS2 on the horizon; this could lead to a further boost in numbers as the projects develop.

⁹ Cheshire East STEAM Final Trend Report for 2009-17, Global Tourism Solutions (UK) Ltd, 2018 (monetary figures are in current prices, i.e. they include the effect of inflation)

Strategic Objective 11 – Increase the economic contribution of the Cultural and Visitor Economy

The Cheshire East Visitor Economy Strategy has aligned itself to the Visit England Strategic Framework for Tourism Report for 2010 to 2020 in setting out an ambition to grow the value of the Visitor Economy by 5% year on year so that the target value for Cheshire East in 2020 is £1.076 billion. Confidence in the sector continues to grow with major investments from premium hotels and marinas across the Borough and a 69.2% increase in location filming from 2012 stimulating interest in Cheshire East as a TV location including Home Fires, Peaky Blinders and Cold Feet.

There are sector-specific actions articulated through the existing Cheshire East Visitor Economy Strategy, Cultural Framework, Strategic Events Framework and the sub-regional Destination Marketing Plan. The potential of Business Tourism to Cheshire East is important, not just because it helps to keep venues and accommodation providers busy, but because it attracts key business decision makers to our region. Our offer complements the adjacent metropolitan areas, being in the main smaller unique/unusual locations, while Crewe is ideally positioned to become 'The place to meet' in the future because of its connectivity.

As a Local authority, Cheshire East has a key role in developing the visitor and cultural economy's local growth potential through playing a strong leadership role and catalyst for growth; creating the conditions for it to thrive, setting the planning context, investing in infrastructure, improving skills and incentivising inward investment. Cheshire East can help ensure there is a rich cultural offer to attract visitors, pulling in visitors through the area's events, arts and heritage and helping to support its value as a 'Cultural Destination' through both vibrant towns and the rural setting. The Council also has an important role, along with the Destination Management Organisation, in helping coordinate the activities of stakeholders across the destination and working with partners to achieve growth.

Evening Economy

The hospitality and evening leisure economy is not as strong in some towns as some comparable areas although the café, restaurant and bar offer is growing but there is a need to create more of this to encourage people to stay after working hours. Opportunities will therefore be sought to work with partners on the enhancement of the early evening offer, the cultural offer and to strengthen the hotel offer to meet the growing demand from both the visitor and business markets in key locations.

Cultural offer

There is a need to focus on our cultural offer as this is often a significant pull factor in the location decisions of businesses, but particularly in creating clusters of creative

industries. In addition, a vibrant cultural offer attracts other forms of strategic investment, and integrates new neighbourhoods and infrastructure to maintain thriving and attractive places. Localised strategies to support and enhance the cultural offer can attract and integrate new development to create a cohesive sense of place. For example, cultural programming around new major infrastructure (e.g. HS2) can assist integration into the fabric of a place and help to build buy-in from communities as well as supporting positioning with visitors by developing a shared 'narrative' on what makes a place distinctive.

Skills needs

The visitor economy sector continues to grow, helping to support the vibrancy of places and brand positioning. However, an increase in economic contribution for the sector through skills support is a priority to help it realise its economic potential and profitability. The skills base plays a critical role in productivity given the number of businesses reporting that their staff lacks the sufficient skills to meet business needs. This is largely due to high levels of labour turnover which also diverts existing investment in training and development away from where it is needed most in addressing skills gaps. Considerable attention has been given to the recruitment challenges in the sector, but evidence suggests that paying more attention to staff retention would help to tackle recruitment problems, while also increasing the competency of the hospitality and tourism workforce. The visitor economy also plays an important role, especially for young people in providing 'pathways to work' equipping people with core skills in a vibrant and customer focussed sector. Added to this there is a requirement to 'change the perception' of tourism and hospitality as a low level seasonal job to that of a rewarding and quick progressing career.

Action: Develop and refresh strategic approaches to culture and programming linked to the cultural framework priorities and development of a cultural destination.

Action: Support measures that help to nurture a 'creative ecology' that builds on current strengths leading to investment in culture and its economic contribution.

Action: Deliver the Visitor Economy Strategy and engage sub-regionally to seek improved productivity and economic impact from the sector.

Strategic Objective 12 – Position Cheshire East as a visitor destination

By the nature of the cultural and visitor economy, many visitor offers go beyond the borough boundaries and Cheshire East also form part of a wider offer due to its excellent connectivity both nationally and internationally and proximity to major visitor destinations of Manchester, Liverpool, Chester and the Peak District. Opportunities have been sought to develop these with partners and external funding, including

Gateway marketing, the 'Cultural destinations' programme, Discover England funding and joint marketing initiatives. Working with destinations, travel trade and the tourism industry and targeting the US market, Marketing Manchester leads a partnership that includes Marketing Cheshire, to maximise the potential of the North of England as an international destination and the Airport as a gateway to the North.

Business Tourism

This is a difficult area for Cheshire East, with significant metropolitan competitors on the doorstep. However, previous research identifies that a focus on niche markets that support existing specialisms as well as the 'Associations' and meetings markets are worth developing further. The strategic connectivity of Crewe and other towns linked to HS2 will open up opportunities in these markets and the strength of rural-based (often heritage) attractions offer unique venues that larger areas struggle to match. Related to this, 'Brilliant Science' is a Visit England funded pilot that leveraged the UK's excellent international reputation as a world leader in science and engineering to develop the theme of science tourism; initially on developing a cluster between Cheshire, Manchester and Stoke-on-Trent. Brilliant Science has developed a range of thematic itineraries and packages to suit different interests and needs. It has helped to identify some business strengths in Science and generate a number of leads. A similar approach for other key sectors could have value in reaching the potential of the business tourism and meetings offer.

Rural Tourism Sector

By the nature of the area, a significant part of the visitor offer is rural-based, whether as attractions, events, hotels, walks or wedding venues. The development of a distinctive rural offer that takes advantage of these assets and attracts investment in them is therefore of importance in terms of economic output and image/profile.

Strategic Events

With an important role to play Strategic Events contribute to achieving 'distinctiveness', creating and communicating the 'identity' of a place as part of place marketing and creating pride in an area for residents and businesses alike. Events are identified within the Council's Visitor Economy Strategy (2016-2020) as an important driver with direct economic benefit. For example, by hosting the Cheshire East tour of Britain in 2016 the borough benefitted from £3.5m of economic activity on one day. Marketing Cheshire has also identified major events as a key economic driver for Cheshire overall: Their 2011 study of 6 major events in Cheshire concluded that they attract 500,000 visitors to Cheshire each year, generating circa £48m of visitor expenditure.

Events and Festivals

Can be positive economic and social drivers encouraging financial and social investment by a wide range of organisations and communities attracting sponsorship from private and public investors. Cultural events can also reinforce and communicate distinctiveness, supporting economic, social and marketing objectives. Realisation of the potential of strategic events to underpin and communicate the proposition requires capacity for research, support, bid development, sponsorship and project management. There is an important link to place making and a current need for small scale intervention to support, sustain and nurture some existing events and to realise their potential for growth. Events can make a valuable contribution to the visitor economy, image/profile and community outcomes. The growth of events is supported by the Council's Cultural and Strategic Events Frameworks.

Visitor Economy Strategy

Supports an overall vision to maximise the contribution of the Visitor Economy to the productivity, employment and quality of life of Cheshire East. The strategy sets out an approach to achieving an increase in economic value to £1bn by 2020 and recognises that partnership working is at the core of delivery, including close working with business clusters, Marketing Cheshire, (the sub-regional tourism board), and attention to cross-boundary opportunities and cooperation.

Action: Deliver the Visitor Economy Strategy in partnership with business clusters and Marketing Cheshire.

10. MEASURING SUCCESS

Data for the analysis of the strengths and issues within the local economy is provided by our ongoing economic monitoring which includes the Cheshire East Economic Profile (last updated August 2018) covering population, employment, housing, qualifications, the Cheshire Business Survey completed in 2017 and recent work carried out to produce a Borough Profile in spring 2019 covering a wide range of topics including education, skills, health and crime as well as economic and demographic indicators. We also have key economic performance indicators which are measured locally which together with the Economic Profile provide an introductory robust evidence base to illustrate the current economic position, inform economic projections and facilitate measuring our success.

Further analysis and interpretation of the data, future growth sector specialisms to target, measuring success and sharpening the priorities and framework was provided through a commission of professional support.

In addition to the performance monitoring of specific actions within the Strategic Objectives, the Economic Strategy will monitor its four key performance indicators which are directly linked to the LEP Performance Indicators and the Sub-Regional Prospectus and will be reviewed annually.

So for the period of this strategy by 2024 there is an ambition to:

- Grow the Cheshire East Economy to at least £15 billion
- Create an additional 7,000 jobs
- Build up to 11,000 new homes
- Be more productive than the UK average

11. GOVERNANCE

The Corporate Plan for Cheshire East highlights how the Council is striving to create sustainable growth in the local economy. The Economic Strategy provides the Council with a clear proposition regarding its approach to supporting economic growth that is shared with the community, businesses, partners, government and investors and sets out these key priorities for delivery.

It builds upon and supports strategy development at national, sub-regional and local levels including the sub-regional Strategic Economic Plan (SEP) for Cheshire and Warrington, the Cheshire and Warrington Local Industrial Strategy and a suite of local strategies which focus on strategic, spatial and sectoral priorities for economic growth within the Cheshire East area specifically.

The Cheshire East Place Board is a sub-set of the Cheshire East Leaders' Board. The Place Board includes representation from local businesses, further education, housing providers and chambers of commerce and has been established to provide strategic direction and leadership to the development and delivery of an Economic Strategy and associated Action Plan to support economic growth within the Borough.

This Economic Strategy, developed by the Place Board in consultation with the businesses and residents of Cheshire East, is intended to be owned by all of Cheshire East and should not be read in isolation; everyone has a role to play in the delivery of the Priority Themes and Strategic Objectives from improving productivity and earning power, creating the right conditions for business growth, protecting and enhancing the quality of place and environment, providing a strong cultural offer and keeping residents and businesses connected.

Cheshire East Council will monitor delivery through a range of success measures which build upon these objectives, some of which are strategic economic measures, and some more specific to the targeted programmes, including those within existing, related strategies. Performance will be fed back through the Cheshire East monitoring process and to the Place Board on a quarterly basis which will report back up to the Cheshire East Leaders' Board annually.

12. ACTION PLAN

Theme / Action	Output	Timescale	Lead
Strategic Theme 1 – The Place to Live			
Strategic Objective 1 – Improve quality of place with a focus on regenerating our town centres			
Strategic Objective 2 – Influence housing delivery to expand the variety of housing and tenure			
Strategic Objective 3 - Protect and enhance the environment and economy in rural areas			
Strategic Theme 2 – The Place to Connect			
Strategic Objective 4 – Capitalise on the growth opportunity of HS2			
Strategic Objective 5 – Improve connectivity options, efficiency and sustainability			
Strategic Theme 3 – The Place to Work and Learn			
Strategic Objective 6 – Support residents to improve their skills levels			
Strategic Objective 7 – Ensure education provision meets employer demand			
Strategic Theme 4 – The Place to Invest			
Strategic Objective 8 – Strengthen business support, particularly for our key businesses			
Strategic Objective 9 – Deliver and grow the Cheshire East Science Corridor			
Strategic Objective 10 – Develop a clear place marketing approach and investment plan			
Strategic Theme 5 – The Place to Visit			
Strategic Objective 11 – Increase the economic contribution of the cultural and visitor economy			
Strategic Objective 12 – Position Cheshire East as a visitor destination			

13. APPENDIX I – ECONOMIC DATA

Building on our success

Cheshire East is one of the UK's most successful places with our economic performance consistently and significantly exceeding both the regional and national average.

A vibrant and resilient economy

Cheshire East makes a significant contribution to the economy generating £12.5bn which accounts for 44% of the Cheshire & Warrington total (£28.5bn) and 8% of the North West's (£165.3bn) GVA (CW&C makes up 33% £9.4bn and Warrington 23% £6.6bn).¹⁰ For the period 2011 to 2016 our Gross Value Added grew by 3.8% per year on average; faster than both the North West (1.9%) and the UK (2.2%).¹¹ ¹²As of 2016, labour productivity (GVA per hour worked) was 4.1% higher in Cheshire and Warrington than in the UK¹³ and between 2010 and 2015 our employment growth in Cheshire East was 11.2%, more than double the regional rate (NW 4.8%) and well above the national rate (GB 6.8%).¹⁴

A strong and diverse business base

We have 20,230 businesses in the Borough (as of 2016), the highest figure in recent years which is the highest of any NW authority (district or unitary) area apart from Manchester.¹⁵ The business birth rate is well above the NW and UK averages (as of 2016) and business survival rates exceed the UK average with 91% of businesses

¹⁰Regional Gross Value Added (Income Approach) 1997-2016 data, ONS, December 2017

¹¹ Regional Gross Value Added (Income Approach) UK 1997-2016 data, Office for National Statistics (ONS), December 2017.

¹²Data series ABML and ABMM, from the time series dataset released as part of the 'Quarterly National Accounts: Quarter 3 (July to Sept) 2017' ONS Statistical Bulletin, Dec 2017.

¹³ Sub-regional Productivity: Labour Productivity (GVA per hour worked and GVA per filled job) indices by Local Enterprise Partnership, ONS, February 2018.

¹⁴Business Register and Employment Survey (BRES) open access data series for 2009-15, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018. Notes: [1] Figures include self-employed people registered for VAT and PAYE schemes - as well as employees. Self employed people not registered for these schemes, along with HM Forces and Government supported trainees, are excluded. [2] Figures exclude farm-based agriculture.

¹⁵ Business Demography – 2016: Enterprise Births, Deaths and Survivals, Office for National Statistics (ONS), November 2017.

surviving their first year in Cheshire East.¹⁶ The Cheshire Business Survey carried out in 2017 found that over 40% of Cheshire East businesses intend to increase their staffing levels and capital investment and 26% intend to increase the scale of their exporting activities and research and development with 93% of businesses identifying at least one benefit of Cheshire East as a business location.¹⁷

A set of key growth sectors

The Borough also boasts significant company activity in high-value and high-skilled sectors such as scientific research and pharma, digital and creative, advanced manufacturing, financial and insurance and transport and logistics. This mix of high growth sectors and leading international brands, many of which are exporters, means that Cheshire East has a significant potential for growth.

Quality of Place

We have a number of vibrant and historic towns located throughout the borough with attractive and varied townscapes, listed buildings and distinctive characters. They provide high quality living and working environments and are a key part of the borough's visitor economy. Many are also designated as conservation areas. A rich and historic environment provides the focus for vibrant and locally distinct communities, with a strong sense of place and self. The towns also provide a valuable link to rural communities, which are equally vital to the wider economy and local identity. Their conservation and enhancement is extremely important, to ensure that communities remain genuinely sustainable, retain their individual character and maintain their important economic function.

Rural Economy and Environment

The rural aspect of Cheshire East is significant in terms of population, economic impact and its contribution to the borough's quality of place. It helps to define the character of the place, but brings with it both the constraints and opportunities that are peculiar to rural areas. We want to ensure we have a place that is attractive, delivering vibrant town centres and an area offering high quality in both urban and rural places. Maintaining a strong quality of place can help ensure that we attract and

¹⁶Business Demography – 2016: Enterprise Births,

Deaths and Survivals, Office for National Statistics (ONS), November 2017. [2] ONS mid-year population estimates for 2016, including revised estimates for 2012-16 (March 2018 release). Crown Copyright 2018. ONS licensed under the Open Government Licence v. 3.0.

¹⁷ Cheshire Business Survey 2017

retain the inward investment, skilled workers and visitors we need to grow our economy.

Education

The borough has major educational assets, in terms of skills development and knowledge transfer, in the form of; 2 Further Education colleges, Cheshire College – South and West Crewe Campus and Macclesfield College; Reaseheath College, agricultural specialist and Centre of Excellence for Agri-tech with over 7000 students; Crewe University Technical College associated to local advanced manufacturing and engineering design businesses including Bentley Motors and Siemens; plus Jodrell Bank is of great scientific significance as a leading facility for radio-astronomy and scientific research in the UK.

A skilled workforce

Cheshire East's population is amongst the most highly qualified in the country with attainment at all levels higher than the national average and over 45% educated to Level 4 and degree-level compared to 38% nationally.¹⁸ Around 35% of current occupations in Cheshire East are either professional or managerial, and there is a future forecast need for 11,000 new managers and 27,000 professionals over the period from 2016 to 2025 (mainly to replace older workers as they retire).¹⁹ With 15 higher education institutions including Manchester and Liverpool within a 50 mile radius providing access to around 40,000 new graduates each year, the area would seem to be well placed to capitalise on its growth potential.

Unemployment

This has declined significantly over the last few years and overall the proportion of the working-age population in Cheshire East claiming out-of-work benefits has decreased between 2011 and 2016 from 8.3% to 5.9%.²⁰ There are also low and declining numbers of NEET (not in education, employment or training) young people; the 3 month average NEET figure has fallen by 22% from 412 in 2014/15 to 323 in 2015/16.

¹⁸Annual Population Survey, January to December 2017, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018.

¹⁹ Baseline projections from the Cheshire & Warrington Econometric Model (CWEM). Projections were obtained using Cambridge Econometrics (CE)/IER LEFM software and are consistent with CE's UK Regional Forecast of August 2017. Additional data preparation and aggregation by Cheshire East Council.

²⁰Benefit claimants - working age client group' data sets for November 2011 to November 2016, DWP Benefits data, ONS, NOMIS. Crown Copyright 2018.

Good neighbours

The Cheshire East economy does not operate in isolation being influenced by interactions with the neighbouring economies of Manchester, Liverpool and the Midlands which provide employment and business opportunities and access to research and knowledge resources and cultural facilities. Although it is predominantly a rural area, Cheshire East benefits from unrivalled access to the country's major land, air and sea routes.

Connectivity

Quick and easy travel throughout the region and the wider UK is possible thanks to convenient access to the national motorway and railway networks with more than 40 trains from Crewe to London each day and a travel time of 90 minutes. Opportunities for international travel and trade are enhanced by the area's proximity to two major airports; Manchester Airport (the UK's busiest outside London) and Liverpool John Lennon Airport. Businesses in the sub-region also have access to good quality maritime trade links via the Port of Liverpool and the Manchester Ship Canal.

Housing delivery

Housing completions in Cheshire East have been rising steadily for the past 5 years and we have exceeded our Local Plan target for housing delivery for 2017/18; delivering 2,321 new homes against a target of 1,800. We have also almost doubled the target of 355 affordable homes, providing 655; 28% of new households in the Borough. CEC achieved 183% in the National Housing Delivery Test and in 2017/18 was the 8th nationally for housing delivery – building more homes than major cities such as Sheffield and Leeds and more than any London Borough.

Growing Cultural and Visitor Economy

The visitor economy is an important contributor to the Cheshire East economy with over 11,000 jobs associated with the tourism industry. Cheshire East welcomes around 16 million visitors each year and figures reported in 2017 demonstrate that the Borough's visitor economy grew by 3.2% on the previous year in 2016 amounting to a sector total of £921 million with a forecast to grow to over £1bn by 2020.

Addressing our challenges and barriers to growth

We have made significant progress, with a programme of action for economic growth in place flowing from the Local Enterprise Partnership's Strategic Economic Plan and our growth proposals. However, there are a number of challenges that could affect our ambition to sustain this growth.

Productivity growth

It has been well documented that growth in productivity (or output per hour worked) in Britain is lagging behind most leading western economies and whilst productivity growth in Cheshire is above both the regional and national average, it has still not recovered to 2007 levels. The overall GVA performance is driven by some very large, high value companies which mask any underperformance in other sectors and the wider SME population. The economy is therefore not as resilient as it may appear.

A declining workforce and ageing demographic

The total working age population has contracted in nearly every year between 2008 and 2017 with a marked decrease in 25 to 34 year olds as proportion of total population. The number of older people (aged 65 and above) has increased by 78.3% between 1981 and 2017 and in the last 6 years of this period, grew by 2.9% per year compared to an average growth rate of 0.4% for the Borough's total population. This not only implies that the demand for health and social care services will increase but will cause significant replacement demand for jobs. This replacement demand is estimated at 230,000 across Cheshire and Warrington for the period 2011 to 2025, around 90,000 jobs in Cheshire East.

Skills mis-match

Employers across Cheshire East continue to report that too many young people are not prepared adequately for the world of work and do not have the skills they require. Only 23% of employers report to have employed an apprentice during the 2012 to 2017 period and student enrolments are decreasing in the sectors predicted to grow i.e. high-value engineering and manufacturing technologies and critical public and private services in health and social care.

Significant commuting flows both in and out of the Borough

There is a net inward flow of workers in the 25 to 34 year old age range in particular commuting to employment opportunities within the Borough. This along with some significant outflows as well, not only puts pressure on transport networks and infrastructure but also implies that there are skills mis-matches for our residents and businesses. In a recent business survey 45% of businesses say they have

experienced recruitment difficulties and 83% cited skills gaps as an issue. Interventions to address the mismatch could clearly improve productivity.

Skills policy

There is a challenge to the FE sector both nationally and locally to be as responsive and flexible as employers want/need due to funding policy, reduced capacity and reorganisation. Changes to post 16 policy and the impact of this, particularly the introduction of new T-Level qualifications in 2020²¹ provide further challenge with no Cheshire East schools or colleges within Cheshire East set to deliver them.

Apprenticeship growth

Cheshire East performs relatively well in terms of the number of apprentice start-ups in the area but the Government target of 3 million apprenticeship starts is indicative of high growth. There has been little or no increase in learner take-up of science, technology, engineering and maths (STEM) subjects since 2011/12 with a continued decline in females in these subjects. Higher level / degree level apprenticeship provision is small with very few providers currently and the new Apprenticeship Levy has been difficult for employers to manage efficiently.

Health related worklessness

Across Cheshire East there are approximately 50,700 economically inactive residents of which over 10,000 are claiming employment support allowance or incapacity benefit. Recent research by the LEP suggests that there are high concentrations of those too sick to work within the sub-region including parts of Cheshire East. This represents a significant loss of potential that could be applied for the benefit of economic growth.

Low pay progression

Approximately 22% of the working age population in Cheshire East are experiencing either low pay i.e. earning less than 2/3 of the median wage, or short term employment with many cycling between the 2 with low productivity and unequal access to opportunity. Low paid jobs are often in areas of comparable wealth where workers are unlikely to be able to afford housing and need to commute. Low paid work is also strongly associated to insecurity of employment and non progression with only 25% of workers escaping the low pay 'trap' within 10 years.

²¹ T-Levels are new two-year level 3 technical programmes that will sit alongside apprenticeships and A Levels within a reformed skills training system, primarily aimed at 16-18 learners.

Significant pockets of acute deprivation exist within the Borough

Whilst employment and incapacity benefits levels are on average better than the national figures, there is a more mixed picture at a local level. 18 of Cheshire East's 234 Lower Layer Super Output Areas (LSOAs)²² are among the 20% most deprived in England, according to the most recent (2015) Index of Multiple Deprivation (IMD), which is up from 16 in the previous (2010) IMD. Most (13) of these 18 areas are in Crewe, though there are others in Macclesfield (2) and in Alsager, Congleton and Wilmslow (1 each). 6 LSOAs, all of them in Crewe, rank among England's top (most deprived) 10%. (Conversely, 98 of the 234 LSOAs in Cheshire East are amongst the 20% least deprived in England, including 63 that are amongst the 10% least deprived.)²³

Constraints on development

The newly adopted Local Plan is supporting our growth ambitions with 2,500 acres of land allocated for housing, current planning consent for 20,000 units and 400 sites under construction. The delivery of strategic sites is important for growth and to support job creation and there is an immediate need for premises and good quality open ready sites, particularly in the North of the Borough. There are constraints around the delivery of brownfield sites, the cost, availability and resilience of infrastructure and also on utilities, especially power. Digital connectivity is a further issue and there is a need to develop full fibre capability and accelerate 5G deployment.

Pressure on transport networks

Whilst 60% of businesses identified access to road links as a benefit of Cheshire East as a business location, traffic congestion is the most commonly cited disadvantage. Cheshire East is predominantly rural in geography with limited public transport infrastructure which can lead to challenges including travel to work, travel to learn and access to basic economic infrastructure services (including broadband, telephone and gas services). The scale of the challenge in Cheshire East is evidenced by the recent growth in CO2 emissions from transport, which is 45% of the total (most of this from road transport) whereas other sources of carbon are being reduced.

²² LSOAs are sub-ward areas which the Office for National Statistics created for statistical purposes. They are intended to be of roughly equal size (in terms of population).

²³ English Indices of Deprivation 2015, Department for Communities and Local Government (DCLG) (now the Ministry of Housing, Communities and Local Government), September 2015.

Graduate attraction and retention

Larger firms report that retaining experienced graduates is a challenge with employees often seeking job opportunities in more established commercial centres and major cities. Each year over 5,000 young people go to University outside the sub-region and very few return. In considering these factors and the global trend of movement of people and businesses to cities, the region is challenged by attracting and retaining both businesses and workforce. The future of higher education is further challenged as Manchester Metropolitan University is to withdraw from its Crewe Campus in 2019.

Housing offer does not match demand

The current variety of housing mix and tenure does not meet our requirements considering rural geographies, an aging population and the need to support jobs led growth. The priority is to ensure that the right mix of housing tenure is delivered in the right places, where the jobs are, and at the right time in preparation for and along with development, not after development has taken place.

Exit from the EU

It is important that the Council fully understands the impacts of emerging changes as a result of the UK's Exit from the EU and that contingency plans are put in place and action is taken to ensure that it is continuously working to deliver public services as economically, efficiently and effectively as possible focusing on key risks and opportunities and areas of possible influence in the local area. Key challenges will be retaining a skilled workforce, appeal of the UK with reduced access to the single market and uncertainty undermining investment decisions.