



Company Number: 07388600

Lancashire Enterprise Partnership Limited

**Tuesday, 25th June, 2019 in Lancashire Energy HQ, Blackpool
Airport Enterprise Zone, Squires Gate Ln, Blackpool FY4 2QS, at
4.30 pm**

Agenda

Part I (Items Publicly Available)

- 1. Welcome and Apologies for Absence**
- 2. Minutes of the meeting held on 1st May 2019 (Pages 1 - 8)**
- 3. Matters Arising**
- 4. Declaration of Interests (Pages 9 - 10)**

Items for Decision

- 5. Lancashire's Local Industrial Strategy (Pages 11 - 92)**
- 6. A Cultural Strategy for Lancashire (Pages 93 - 136)**
- 7. Lancashire Enterprise Partnership Limited - Director Defined Term Limits (Pages 137 - 138)**

Item for Information

- 8. Lancashire Enterprise Partnership Limited - Governance and Committees Report (Pages 139 - 144)**
- 9. Any Other Business**

10. Date of Next Meeting

The next Lancashire Enterprise Partnership Board meeting is scheduled to be held at 4:30pm on 12th November 2019, at the Academy for Skills and Knowledge, BAE Samlesbury with a tour of the facility commencing at 3:30pm.

Please note officers will be in contact with Directors and other attendees to obtain personal information required for security purposes to gain access to the site.

11. Exclusion of the Press and Public

The Board is asked to consider whether, under Section 100A(4) of the Local Government Act 1972, it considers that the public should be excluded from the meeting during consideration of the following items of business on the grounds that there would be a likely disclosure of exempt information as defined in the appropriate paragraph of Part I of Schedule 12A to the Local Government Act 1972 as indicated against the heading to the item.

Part II (Items that are Private and Confidential)

Items for Decision

- 12. Lancashire Enterprise Partnership Budget Outturn 2018-19 and Operational Budget 2019-20 (Pages 145 - 156)**
- 13. Growth Deal Approval and Programme Update Report (Pages 157 - 204)**
- 14. Recruitment of the Lancashire Enterprise Partnership Chairman (Pages 205 - 208)**
- 15. Lancashire Enterprise Partnership - Review Update (Pages 209 - 218)**

Lancashire Enterprise Partnership Limited

Minutes of the Meeting held on Wednesday, 1st May, 2019 at 5.00 pm at the Committee Room 'D' - The Henry Bolingbroke Room, County Hall, Preston

Present

David Taylor CBE DL

Miranda Barker
Mike Blackburn OBE
Jim Carter DL
Ann Dean

County Councillor Geoff Driver CBE

Amanda Melton
Mick Gornall
Mark Rawstron
Khalid Saifullah MBE DL
Councillor Margaret Smith
Councillor Mark Townsend

Co-Opted Observer

Tony Attard OBE DL

In Attendance

Neil Jack, Chief Executive, Blackpool Council

Martin Kelly, Director of Growth and Development, Blackburn with Darwen Borough Council

Richard Kenny, Interim Director of Economic Development and Planning, Lancashire County Council

Heather McManus, Chief Executive, South Ribble Borough Council

Andy Milroy, Senior Democratic Services Officer, Lancashire County Council

Katherine O'Connor, Senior Policy Manager, Deputy Area Lead, Department for Business, Energy and Industrial Strategy

Andrew Pettinger, Interim Chief Executive Officer, Lancashire Enterprise Partnership

Angie Ridgwell, Section 151 Officer, Chief Executive and Director of Resources, Lancashire County Council

Laura Sales, Company Secretary and Director of Corporate Services, Lancashire County Council

Stephen Young, Executive Director of Growth, Environment, Transport and Community Services, Lancashire County Council

1. Welcome and Apologies for Absence

The Chairman, David Taylor, welcomed all to the meeting. Apologies for absence were presented from Claire Whelan, Dennis Mendoros, Councillor Simon Blackburn, Professor Mark Smith and Graham Cowley.

The new Lancashire Enterprise Partnership Interim Chief Executive Officer, Andrew Pettinger, introduced himself to the Board and gave an overview of his

background and desires to achieve the LEP's objectives.

2. Minutes of the Special Board meeting held on held on 19th March 2019

Resolved: That the minutes of the Special Board meeting held on 19th March 2019 be approved as an accurate record and signed by the Chairman.

3. Matters Arising

None

4. Declaration of Interests

Amanda Melton raised a non-pecuniary interest in agenda item 17 – Growth Deal Update as her employer – Nelson and Colne College was a previous and potential future beneficiary of Growth Deal Capital Funds. As item 17 contained an update and did not contain any specific decisions regarding allocations Amanda was not excluded from item 17.

5. Lancashire Enterprise Partnership Operational Budget 2018/19 and 2019/20

The Chairman proposed that whilst noting the draft outturn Lancashire Enterprise Partnership Operational Budget position for 2018/19 that the proposed Operational Budget for 2019/20 be deferred.

Resolved: Following advice from the Section 151 Officer, the Lancashire Enterprise Partnership Board:

- (i) Noted the draft outturn Lancashire Enterprise Partnership Operational Budget position for 2018/19.
- (ii) Agreed to defer approval of the full Operational Budget for 2019/20 in order to ensure that there is sufficient resources to enable to Board to ensure the right investment was being made to achieve the emerging ambitions; and
- (iii) Noted the advice of the Section 151 Officer that there were sufficient resources to cover the proposed expenditure and that spending would necessarily continue on business as usual items.

6. LEP Delivery Plan 2019/20

Andy Walker, Head of Service for Business Growth, Lancashire County Council, presented a report (circulated) regarding the Lancashire Enterprise Partnership Delivery Plan for 2019/20.

Board Members expressed a desire to ensure the Delivery Plan links to the Local

Industrial Strategy and other plans to ensure a joined up approach.

Resolved: The Lancashire Enterprise Partnership Board

- (i) Noted the requirement to produce a Delivery Plan and the exemplar template at Appendix 'A' to this report.
- (ii) Noted the initial draft of a Lancashire LEP Delivery Plan which was tabled at the meeting, and
- (iii) Delegated authority to the Chair and Interim Chief Executive to prepare and submit a final draft of this document referencing the comments of the Board, to meet the 31st May 2019 deadline.

7. Response to the Annual Performance Review: LEP Strategy Improvement Plan

Richard Kenny, Interim Director of Economic Development and Planning, Lancashire County Council, presented a report (circulated) which provided a response to the Annual Performance Review: LEP Strategy Improvement Plan.

Board Member expressed a view that Inward investment, exporting, new markets, and climate change references be included in the Improvement Plan and also that it is important to link up all the Lancashire Enterprise Partnership strategies and documentation in alignment. Board Members also requested that the document be split into three categories – strategy, governance and delivery. Officers noted and agreed to amend the document as necessary.

Board Members also discussed to move forward following the LEP Governance Review work and it was noted that as part of the Local Industrial Strategy that workshops with businesses will be held this year with dates to be shared with the Board and business colleagues.

Resolved: The Lancashire Enterprise Partnership Board is asked to:

- (i) Noted the national performance assessment of Lancashire Enterprise Partnership.
- (ii) Noted the urgent response that was required from the Interim Chair and Interim Chief Executive to the request from Central Government for a plan to be put in place; and
- (iii) Approved the Strategy Improvement Plan, subject to the amendments suggested by Board Members set out above.

8. Innovation Plan Progress and the Formation of a Lancashire Innovation Board

Andy Walker presented a report (circulated) containing an update on Innovation Plan Progress and the formation of a Lancashire Innovation Board.

Board Members expressed a desire to broaden the scope of intentions for the Innovation Board to ensure there is commercialisation support in addition to linking together with the existing Lancashire Enterprise Partnership Committees where there are synergies, such as the Skills and Employment Advisory Panel. With regard to a timeline for implementation of the new Innovation Panel it was anticipated that the final Terms of Reference would return later in 2019 (to the Autumn 2019 Board meeting) for approval.

Resolved: The Lancashire Enterprise Partnership Board are recommended to:-

- (i) Note the progress made by local partners in progressing the actions with the Lancashire Innovation Plan.
- (ii) Note the work which has been done on their behalf to compare and contrast the structure of innovation boards across the Northern Powerhouse.
- (iii) Approve the draft terms of reference and suggested membership composition of a Lancashire Innovation and Productivity Board, accepting that these Terms of Reference will need to be transposed to the existing house style for these documents across the LEP's committees; and
- (iv) Instruct the Interim LEP Chief Executive, supported by Lancaster University to progress the recruitment of prospective Innovation and Productivity board members, for ratification by the full Board.

9. Lancashire Digital Skills Partnership: Progress, Digital Skills Innovation Fund and the Tech Talent Charter

Michele Lawty-Jones, Director of the Lancashire Skills and Employment Hub, and Kerry Harrison, Digital Skills Coordinator, Lancashire Skills and Employment Hub presented a report (circulated) which provided the Board with an update on the Lancashire Digital Skills Partnership, Digital Innovation Fund and the Tech Talent Charter.

Board Members expressed their support for the Lancashire Digital Skills Partnership and endorsed the work undertaken to date and also requested that consideration be given to ensuring female entrepreneurs / business owners are engaged with the Digital Skills Partnership.

Resolved: The Lancashire Enterprise Partnership Board

- (i) Noted the progress regarding the Lancashire Digital Skills Partnership.

(ii) Delegated authority to the interim Chief Executive, in consultation with the Section 151 Officer, to sign off the Digital Skills Innovation Fund business cases as appropriate and agree and approve the entering into of grant funding agreements; and

(iii) Approved the signing of the Tech Talent Charter as presented.

10. Governance and Committees Decisions Report

Resolved: The Lancashire Enterprise Partnership Board noted the updates provided in relation to Governance and the Committees of the Lancashire Enterprise Partnership.

11. LEP - Former Executive Committee - Analysis of Decisions taken 2018 / 19

Resolved: The Lancashire Enterprise Partnership Board noted the analysis of the Former Executive Committee decisions taken in 2018 / 19 as presented.

12. Any Other Business

Miranda Barker, attended briefing on High Speed Rail 2 (HS2) and provided an update, it was agreed that the Interim LEP Chairman would write to express the Lancashire Enterprise Partnership's support for HS2.

Tony Attard, Lancashire Enterprise Partnership Co-opted Member, provided an update on Lancashire's City of Culture 2025 bid and progress made. It was reported that an advertisement had been placed for a Bid Director to work up the bid ready for submission by spring 2020. It was agreed that further details including the Job Description would be circulated to Lancashire Enterprise Partnership Directors after the meeting.

13. Date of Next Meeting

The Board noted that the next Lancashire Enterprise Partnership Board meetings were scheduled to be held as follows in accordance with the request to move the meetings around Lancashire:

- 25th June 2019 at 4.30pm, at Energy HQ, Blackpool with a tour of the facility commencing at 3.30pm.
- 12th November 2019 at 4:30pm, at the Academy for Skills and Knowledge, BAE Samlesbury with a tour of the facility commencing at 3:30pm.

14. Exclusion of the Press and Public

At this point the Lancashire Enterprise Partnership Board approved that the meeting move into Part II, Private and Confidential, to consider the remaining agenda items as they contained information defined as confidential or exempt in accordance with the relevant paragraph of Part I to schedule 12A to the Local Government Act 1972 as set out in each report or presentation. It was considered that in all the circumstances of the case the public interest in maintaining the exemption outweighed the public interest in disclosing the information.

15. Lancashire Enterprise Partnership Operational Budget 2018/19 and 2019/20 - Exempt Appendix 'C'

This item was considered as part of the deferred item 5.

16. Local Industrial Strategy Update

Andy Walker presented a report (circulated) which provided an update on the initial states of work on the Lancashire Local Industrial Strategy.

Board Members endorsed the initial work and recognised the need to ensure the Lancashire Local Industrial Strategy takes account of cross boundary working with neighbouring Local Enterprise Partnership areas.

Resolved: The Lancashire Enterprise Partnership Board

- (i) Noted the update on the initial stages of work on the Lancashire Local Industrial Strategy.
- (ii) Approved the proposal to use March 2020 as the deadline date for the production of the Local Industrial Strategy, using the extra time for enhanced consultation; and
- (iii) Delegated to the LEP Interim Chief Executive the decision to commit further, marginal funds to Steer ED and SKV to support enhanced consultation and communications around the strategy production process.

17. Growth Deal Update

Anne-Marie Parkinson, LEP Investment Programme Manager, presented a report (circulated) which provided an update on Growth Deal activity.

Board Members clarified that all projects previously in the Growth Deal 3 pipeline (that did not receive funding) would be considered in any potential re-allocation of funds.

Resolved: The Lancashire Enterprise Partnership Board

- (i) Noted the update regarding the implementation of the Lancashire Enterprise Partnership's Growth Deal Reallocation Procedure in respect of the £16.490m currently unallocated within the Growth Deal Programme; and;
- (ii) Noted the update on the overall performance of the Growth Deal Programme and approved the submission of the Growth Deal Quarterly Reporting Summary Dashboard for Quarter 3 (October to December) 2018/19 to the Government's Cities and Local Growth Unit.

18. Lancashire Urban Development Fund Update

Sean McGrath, External Investment and Funding, Lancashire County Council, presented a report (circulated) which provided an update on the establishment of an Urban Development Fund for Lancashire.

Board Members endorsed the proposals and requested that further consideration be given to the legal implications to see if there are other ways for the Lancashire LEP to remain engaged.

Resolved: The Lancashire Enterprise Partnership Board

- (i) Reconfirmed its support for the establishment of an Urban Development Fund for Lancashire targeted at the development of industrial workspace.
- (ii) Endorsed the proposed Urban Development Fund delivery model, whereby Lancashire County Council creates a wholly owned Special Purpose Vehicle (SPV) to deliver the Fund, based on the proposed Limited Partnership model.
- (iii) Noted the proposal that the county council will fully fund the operating costs of the Urban Development Fund, estimated to be £1 million over 4 years and that the county council will also explore the potential for engagement by the Lancashire Enterprise Partnership Board in the Urban Development Fund structure.
- (iv) Considered and endorsed the proposal that a representative of the Lancashire Enterprise Partnership chairs the Urban Development Fund Investment Advisory Panel.
- (v) Requested that the county council submits a further report on the operation of the Urban Development Fund including consultation on the Investment Strategy to a future Board meeting.

19. City Deal Update

Jim Carter, Chairman of the Preston, South Ribble and Lancashire City Deal Executive, provided a private and confidential update on the City Deal and progress made to date. Work is continuing on the key big schemes and a review of the City Deal with further reports to be presented to the Combined City Deal meeting scheduled to be held in July 2019.

Agenda Item 4

Director's Declaration of Interest in Proposed Transaction or Arrangement

LANCASHIRE ENTERPRISE PARTNERSHIP LIMITED

Name	
Date of Notification	
Date of Consideration of Item (i.e. date of Board meeting)	25.06.2019
Item Number (if relevant)	
Description of Transaction	
Nature of Interest	



Lancashire Enterprise Partnership Limited

Private and Confidential: No

Date: Tuesday, 25 June 2019

Lancashire's Local Industrial Strategy

(Appendix 'A' refers)

Report Author: Andy Walker, Head of Service – Business Growth

Tel: 01772 535629, andy.walker@lancashire.gov.uk

Executive Summary

Further to the Local Industrial Strategy (LIS) update reports presented at the last two LEP Board meetings, this report provides LEP Board Members with an update on LIS development work since 1st May 2019 and provides context for the accompanying presentation from Steer Economic Development, who will share their thoughts on the emerging strategic priorities for Lancashire.

The report details progress to date, the developing approach to consultation and the emerging best practice from other areas such as the LIS trailblazers.

Recommendation

The Lancashire Enterprise Partnership Board is asked to:-

- (i) Note the report and presentation provided and contribute to the development of strategic priorities for Lancashire.
- (ii) Consider how they might individually be able to support policy development and consultation activity through professional networks or through supporting wider engagement events.

LIS Development – Progress to date

- 1.1 Since the last Board on 1st May a considerable amount of work has been done to develop, collate and verify an evidence base which describes the strengths and weaknesses of the Lancashire economy. In addition to a considerable body of desk research, this process has also included the initial consultation activities on the Lancashire LIS. (see Table 1. below) There is also greater clarity on how government wants to engage and co-design activities within the LIS, bringing with it its own deadlines and requirements which need to be built into the LIS development plan.



Table 1. LIS Lancashire Engagement Activity to date		
Activity	Audience	Numbers
Telephone interviews	Key Stakeholders	20
LEP Sub- Groups	Business Support Management Board	10
	Skills and Employment Advisory Panel	15
SWOT Workshop	Economic Development Organisations Businesses (large) HEIs / FE, Local Authorities	50
ELC Event	Businesses (large and SME) FE Local Authorities	110
UCLAN	staff awareness event	48

- 1.2 As illustrated by the numbers above, the appetite of local partners to engage with LIS consultation has been considerable. LEP officers have reacted to this by establishing a number of alternate communications channels including an online questionnaire, LIS web page, and a specific programme of marketing activity to raise awareness and understanding of the LIS development process. A mailing to local MPs is also taking place to make them aware of this specific activity programme.
- 1.3 Requests/suggestions have also been made that specific consultation activity for young people and black and minority ethnic groups should also form part of the consultation process. These lie beyond the current brief of Steer, but could be led LEP by officers or Board member volunteers.
- 1.4 The main output of the initial Evidence Base / SWOT phase of LIS development activity is a "data vault" which presents the evidence base which Steer have collated. This is presented as Appendix 1 to this report. Steer will detail key finding as part of their presentation.
- 1.5 Although comments and evidence are still being received, we need to progress the work to a second phase which will start to set out the emerging strategic priority areas for Lancashire.

2. Emerging Best Practice

- 2.1 Of the three trailblazer areas, West Midlands are the first to publish an agreed Local Industrial Strategy on the 16th May 2019, this is available through this [link](#). A LIS for Greater Manchester is anticipated shortly.
- 2.2 As set out on the government's own LIS website:

"The West Midlands Local Industrial Strategy is a long-term plan aimed to increase productivity. It is locally led and developed in partnership with government, based on clear evidence and aligned to the national Industrial Strategy".

Unsurprisingly, given the structure of their local economy, the LIS has a focus on addressing the Future of Mobility Grand Challenge as the centre of transport innovation in the UK, but it also sets an aspiration to develop new market opportunities in data driven health and life sciences; modern services; and through the application of creative techniques and technologies in future industries.

- 2.3 The document itself is relatively short and organised around 5 foundations of the national LIS. These foundation chapters focus on each is involved in driving productivity, including targeted action on skills, housing and transport with plans to drive up levels of business innovation and the commercialisation of research and development. There is also a clear focus on inclusive growth defined as making sure all communities can contribute to and benefit from economic prosperity.
- 2.4 The document stops short of making specific regulatory, organisational or financial asks of government, although its launch by Andrew Stephenson the Small Business Minister did coincide with the announcement of a further £28m of funding for the Battery Industrialisation Centre in Coventry. Whilst clearly the document is indicating particular strengths and capabilities which might be the subject of further investment, it also sets out how the priorities addressed will be championed via the existing devolved resource.

3. Next Steps in Lancashire

- 3.1 Whilst we need to consider how additional requests for consultation will be met, the current key milestones on timetable relating to the production of the Local Industrial Strategy are set out below:

DATE	ACTIVITY
17/07/19	Online questionnaire closes
24/07/19	Strategic Stakeholder Workshop to develop Strategic Priorities
01/08/19	Lancashire Local Authority Leaders
08/19	Develop theme-level actions/proposition/national and local 'asks'
09/19	Action planning consultation workshop
09/19	Co-design of key propositions begins with HMG departments
11/11/19	Presentation of findings and recommendations to LEP Board
23/12/19	Draft final LIS with LEP



List of Background Papers

Paper	Date	Contact/Tel
Lancashire LIS Evidence Base	May 2019	Andy Walker / 01772 535 629
Reason for inclusion in Part II, if appropriate		
N/A		

WORKING DRAFT: Lancashire Local Industrial Strategy: Evidence Base

Contents

- 1 Overview of the Economy
- 2 Business Environment
- 3 Ideas
- 4 People
- 5 Infrastructure
- 6 Place

Overview of the Economy

Introduction

- Lancashire is a polycentric county with a population of c.1.5 million and a total Gross Value Added (GVA) of £30.8 billion p.a.
- It is a relatively self-contained area in terms of commuting – 12% of its workforce commutes in to Lancashire and 14% of residence work outside the area – with employment concentrated in Preston, Blackburn with Darwen, Blackpool, Lancaster, South Ribble, and Fylde.
- It has a working population of just under 1 million (62% of total population, in line with North West and UK averages).
- Its activity rate is 78% - equal to the UK average and just above the North West average.
- Its employment rate is 74% - equal to the UK and just ahead of the North West.
- Its GVA per head is £19,600 p.a. £2,200 p.a. below the North West average and £9,400 p.a. below the UK average.
- GVA has risen 39% since 1997, this is 6 percentage points fewer than the North West and 10 percentage points fewer than the UK.

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Average weekly earnings are £480, relative to £502 in the North West and £541 in the UK.

Thus, Lancashire has reasonably high levels of economic activity and employment, but a lower level of productivity per worker than the North West and UK. While there has been growth in GVA, Lancashire's GVA growth rates have not kept pace with regional and national averages. Thus, the productivity gap has widened over the past two decades.

- Lancashire has a lower business density (the number of businesses per 10,000 population) than regional and national averages. Its business birth rate runs at 2 percentage points below the North West and UK average of 14%, and a business death rate of 9% in line with the UK average and 1 percentage point below the North West average.
- Based on its relative contribution to UK GVA Lancashire's economy specialises in Manufacturing (Location Quotient of 1.9, almost double the national average) and Agriculture (LQ 1.6, almost two-thirds the national average).
- Overall, Lancashire has a lower share of high-skilled workers (those qualified to NVQ4+) in its workforce than North West and UK averages.
- Lower levels of worker productivity and lower skill levels are key factors in the relatively lower weekly earnings of Lancashire residents – but there are significant variations between places.
- Based on the Inclusive Growth Monitor developed by the Joseph Rowntree Foundation, Lancashire has some way to go both in terms of prosperity and economic inclusion relative to other LEP areas.

Lancashire's relatively self-contained labour market with employment hubs



12% of Lancashire's workforce live outside of Lancashire

Where do Lancashire residents work within Lancashire?

- 13% in Preston
- 9% in both Blackpool and Blackburn with Darwen
- 8% in Lancaster
- 7% in South Ribble
- 6% in Fylde
- Less than 5% in each of the remaining LAs

14% of Lancashire's residents work outside of Lancashire

Source: Census 2011

The Vital Statistics

Indicator	Lancashire	North West	UK	Source/Date
Total GVA	£30.8bn	£167.2bn	£1,756.1bn	ONS/2016
Total Population	1.484m	7.224m	65.648m	PE/2016
Working-age Population (WAP)	914.5k	4.5m	41.4m	APS/2016
Working-age Population (WAP) (%)	62%	63%	63%	APS/2016
Economic Activity Rate (WAP)	78%	76%	78%	APS/2017
Employment Rate (WAP)	74%	72%	74%	APS/2017
Employment Growth (WAP) (+/- since 2007)	+3%	+6%	+8%	BRES/2015
GVA per head	£19.6k	£21.8k	£29.0k	ONS/2015
GVA per employee	£42.1k	£45.5k	£50.8k	ONS/2015
GVA Growth (+/- since 1997)	+39%	+45%	+49%	ONS/2015
Average Weekly Earnings	£480pw	£502pw	£541pw	ASHE/2014
Proportion of WAP with NVQ L4+	32.6%	33.9%	38.0%	APS/2016
Total Active Enterprises	43.3k	259.7k	2.6m	BD/2015
Business Birth Rate	12%	14%	14%	BD/2015
Business Death Rate	9%	10%	9%	BD/2015
Employment in Manufacturing (% of all jobs)	13%	9%	8%	BRES/2015
University spin-outs/start ups since 2000	27 (1% UK)	156 (7%)	2,293	Spinouts UK/2017
Patent Applications (2005-2017)	1,130 (1.7% of UK, 22.8% of NW)	4,970	64,800	IPO/2017
Employment in Professional, Scientific & Technical (% of all jobs)	5%	7%	8% (GB)	BRES 2015
Total R&D Expenditure (£ per person employed)	£525	£1,093	£1,070	Eurostat + BRES/2011
Average House Prices	£143k	£157k	£225.3k	UKHPSSA + UKHPI/2017

Economic structure

Sector	Share of total GVA (%)	Share of total employment (%)	GVA per job	GVA LQ	Employment LQ
Real estate	13	1	379,199	0.9	0.9
Electricity	1	0	135,220	0.7	0.9
Water supply; sewerage	1	1	84,045	1.3	1.2
Financial services	3	1	73,241	0.4	0.4
Manufacturing	20	12	65,807	1.9	1.6
Public administration and defence	6	5	52,159	1.3	1.1
Information and communication	3	3	47,922	0.5	0.6
Construction	6	7	38,369	1.0	1.1
Wholesale and retail trade	13	15	37,760	1.2	1.0
Agriculture	1	1	34,923	1.7	1.0
Transportation and storage	3	4	32,411	0.7	0.8
Professional services	5	6	31,532	0.6	0.7
Education	6	9	29,235	1.0	1.1
Other services	2	3	28,586	0.8	0.9
Human health and social work	10	15	27,760	1.3	1.2
Mining and quarrying	0	0	21,415	0.2	0.7
Accommodation and food	4	7	20,528	1.2	1.1
Arts	1	3	20,005	0.8	0.9
Administrative and support	3	7	17,531	0.6	0.8

Source: GMFM, 2018

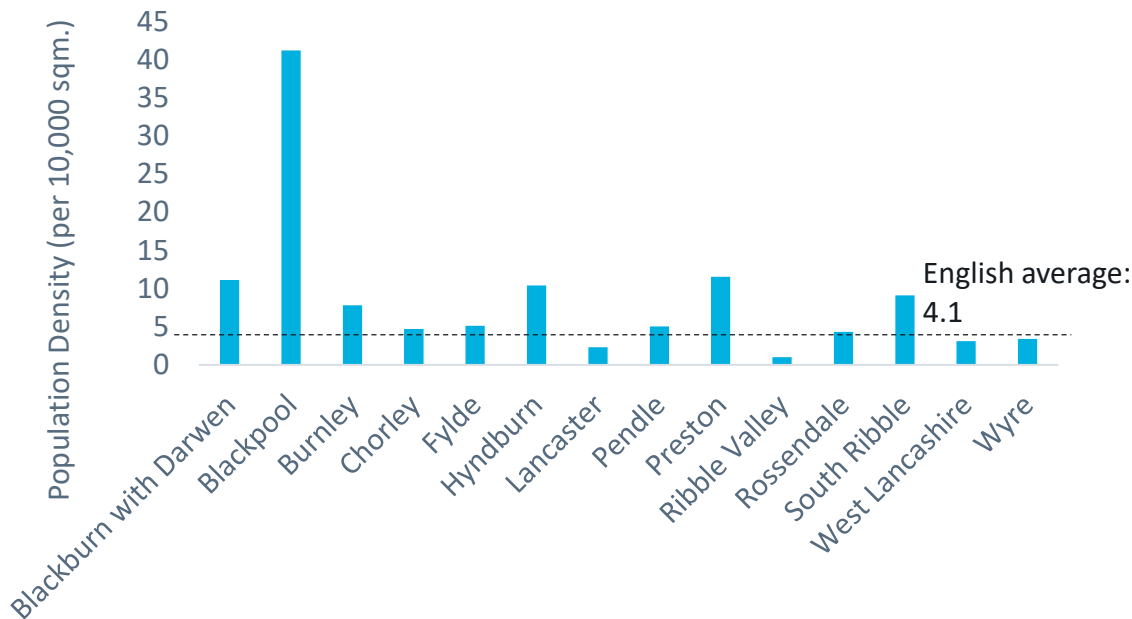
Headline population data

Population density of Lancashire

Indicator	Lancashire	North West
Area (sqm.)	1.4m	7.1m
Population	1.5m	7.3m
Population Density (per 10,000 sqm.)	4.7	5
Population Density Index (England=100)	115	122

- Lancashire has a population of 1.5 million people with a population density of 4.7 people per 10,000 sqm, a little below the regional average of 5, but above the England average of 4.1.

Population density by Local Authority District



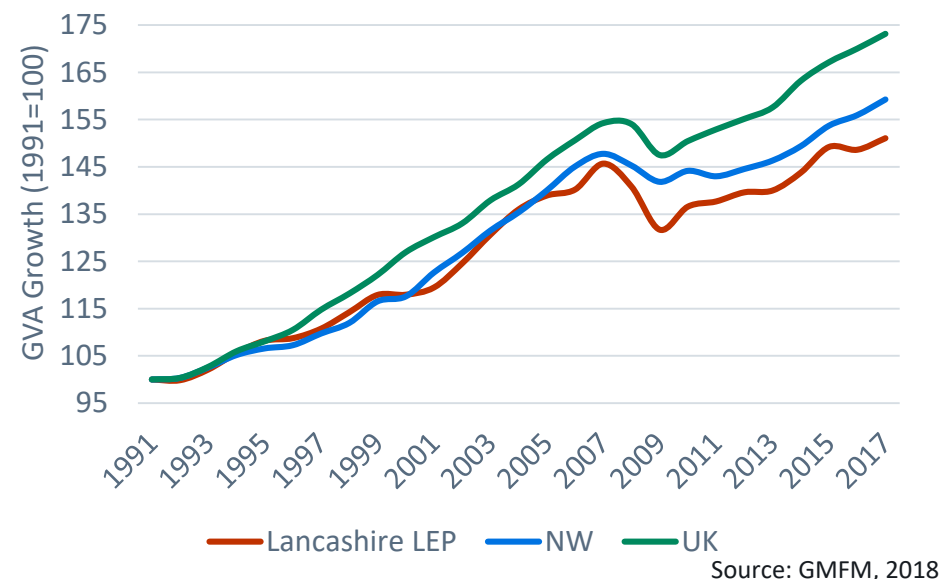
- Population density varies significantly between Local Authority Districts – Blackpool has the highest population density at around 40 people per 10,000 sqm, while Ribble Valley has the lowest population density at around 1 person per 10,000 sqm.

Source: Census 2011

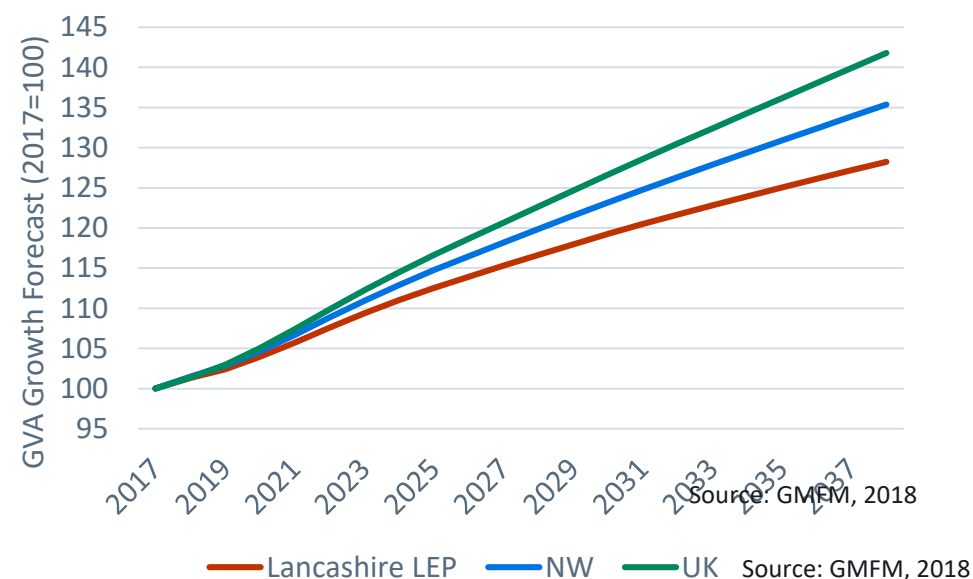
GVA growth trends and projections

- Lancashire has achieved significant growth in GVA since 1991.
- However, Lancashire's GVA growth has not kept pace with that of the North West or the UK.
- Thus, the 'productivity gap' between Lancashire and the UK has widened rather than narrowed.
- The Greater Manchester Forecasting Model's (GMFM) projections of GVA growth for Lancashire to 2037 (based on Oxford Economics' model) show that Business As Usual (BAU) in Lancashire is likely to lead to a further widening of the productivity gap with the UK.

GVA growth trends 1991-2017



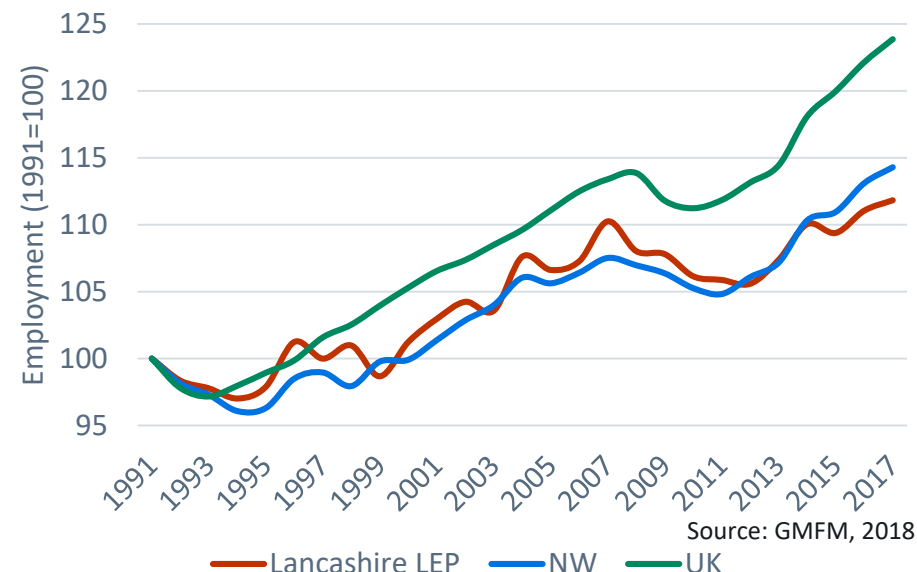
GVA growth projections 2017-2037



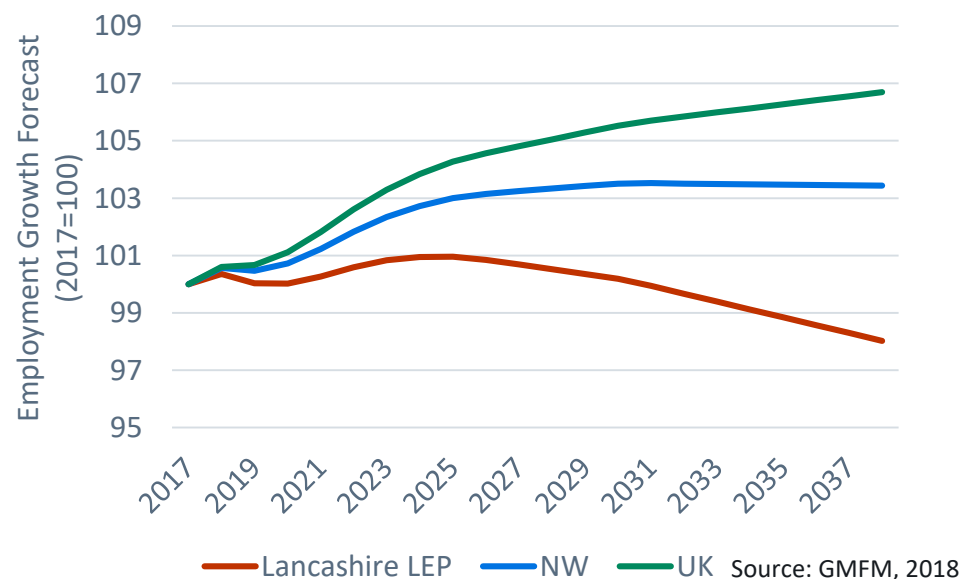
Employment trends and projections

- Lancashire's economy generated employment growth in the period 1991-2017.
- This growth tended to be lower than the UK trend but higher than that for the North West trend – with periods of relative over or under-performance.
- Lancashire's economy appears to experience greater fluctuations around national and regional trend employment trends. And sometimes Lancashire's labour market moves counter to UK and North West trends.
- Overall employment projections, using the GMFM, show employment in Lancashire is likely to fall by a couple of percentage points in the period to 2037, assuming BAU.
- This projection runs counter to employment projections for the UK and North West.
- Thus, BAU is likely to see fewer job opportunities created in Lancashire than in the past.

Employment change 1991-2017



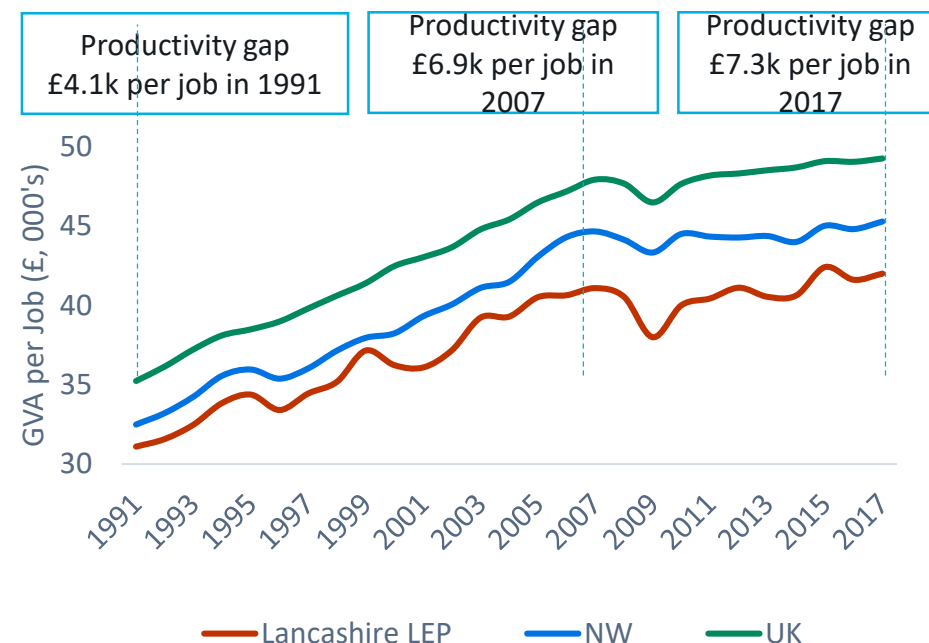
Employment change projections 2017-2037



Productivity trends and projections

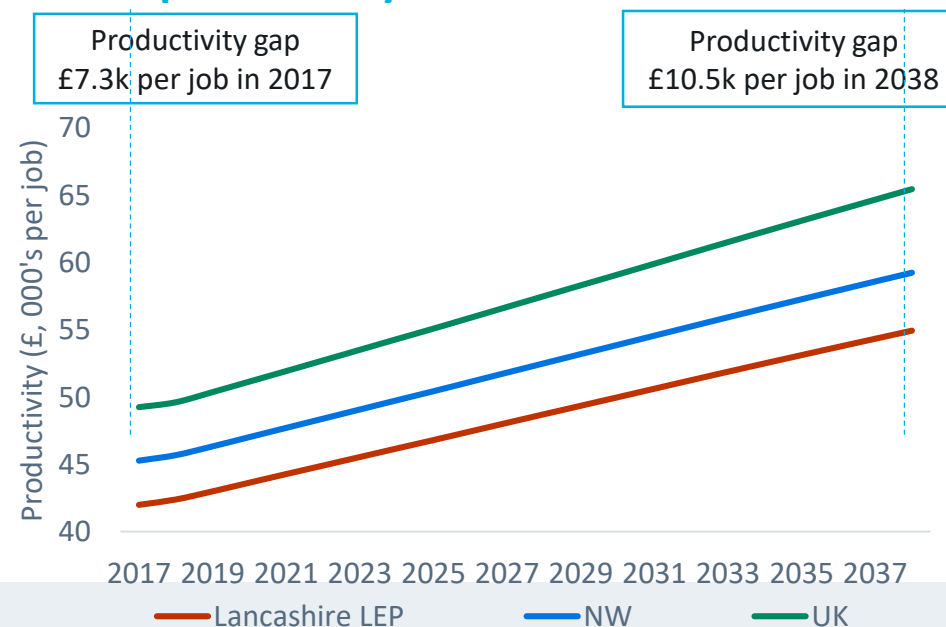
- Overall, worker productivity in Lancashire rose in the period 1991-2017 from around £31,000 p.a. to £42,000 p.a. – but the gap between Lancashire’s GVA per worker and the rest of the UK widened – setting a tougher challenge for the period to 2037.

Worker productivity 1991-2017



Worker productivity 2017-2037

Source: GMFM, 2018



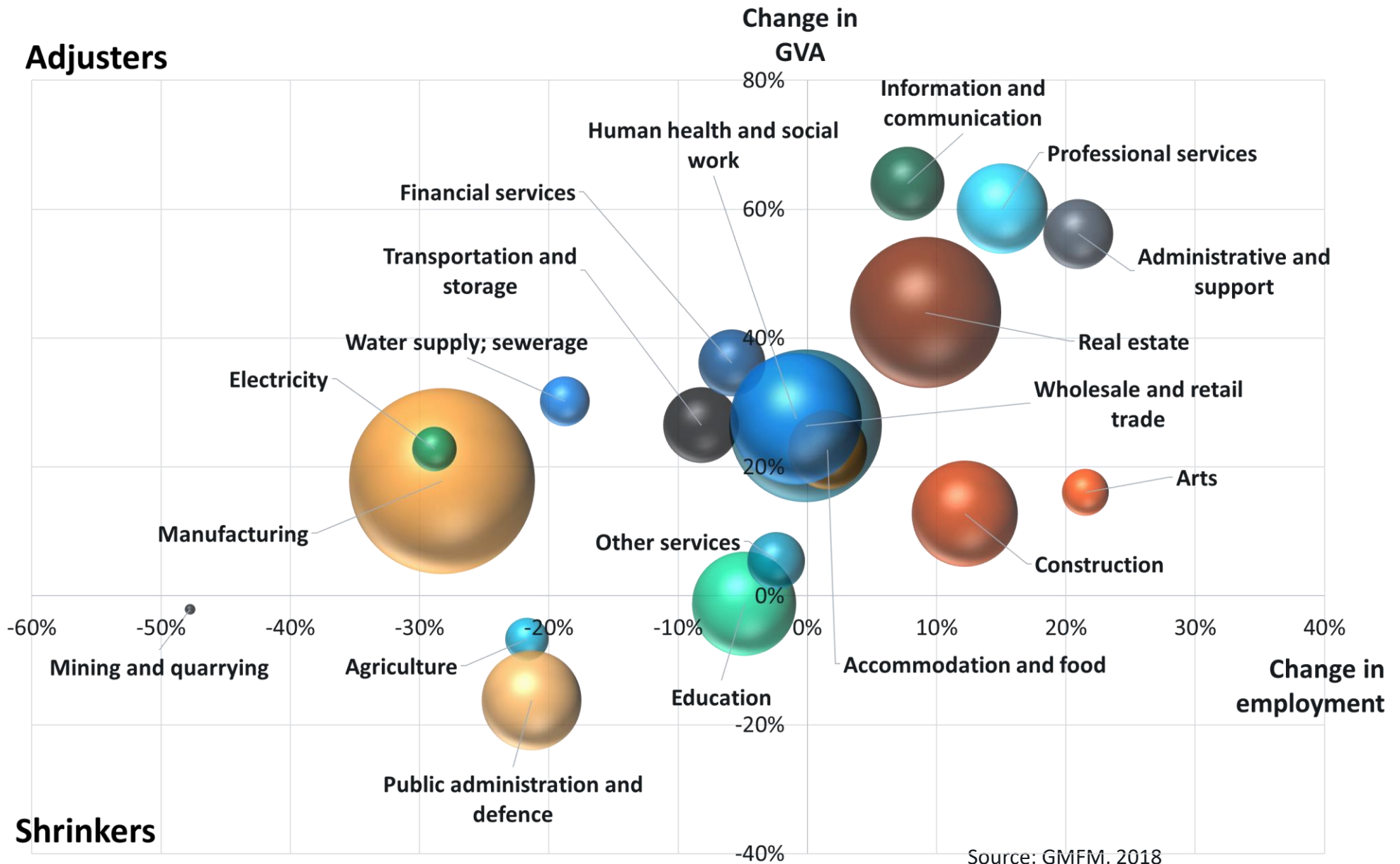
- Based on previous performance, projections of worker productivity in Lancashire from 2017-2037 show continued growth but with BAU the productivity gap with the rest of the UK is also set to widen.

Projected Sectoral and Occupational Change

- Change in GVA, employment and worker productivity varies between sectors.
- The next slide shows projected change in GVA and employment for the period 2017-2032.
- Projected change in GVA is shown on the vertical axis, projected change in employment is on the horizontal axis.
- The size of each 'bubble' represents the scale/significance of GVA in a given sector in 2017.
- The projections show that the key sectors in Lancashire fall into one of three categories:
 - 'Expanders' which are projected to generate increases in GVA and employment to 2038;
 - 'Adjusters' which are set to experience increases in GVA long with decreases in employment to 2038; and
 - 'Shrinkers' which will experience decreases in both GVA and employment to 2038.
- The projections suggest that Lancashire's:
 - 'Expanders' include: Information and Communication, Professional Services, Administrative support, Real Estate, Arts, and Construction;
 - 'Adjusters' include: Manufacturing, Financial Services, Water, Electricity, and Transportation and Storage; and
 - 'Shrinkers' include: Mining and Quarrying, Agriculture, Public Administration and Defence.
- The scale and rate of projected change will pose challenges to support local economies and workers transition to new sectors and roles. This will require support to workers who need to reskill to move sectors or upskill to take new roles within their existing sector. It will also require support to places to allow them to stay ahead where they are currently strong and design routes to excellence where current strengths may be linked to new opportunities.
- Projected changes will also change the occupational mix of jobs in Lancashire (see subsequent slide).
- Projections show increases in the following occupations:
 - Culture, Media & Sports Occupations;
 - Business & Public Service Professionals;
 - Business & Public Service Associate Professionals;
 - Skilled Construction & Building Trades;
 - Science & Technology Professionals;
 - Customer Service Occupations;
 - Leisure & Other Personal Service Occupations;
 - Corporate Managers;
 - Caring Personal Service Occupations;
 - Managers / Proprietors in agriculture & services; and
 - Health Professionals.
- The following occupations are projected to experience decline:
 - Transport & Mobile Machine Drivers & Operatives;
 - Textiles, Printing & Other Skilled Trades;
 - Science & Technology Associate Professionals;
 - Administrative Occupations;
 - Teaching & Research Professionals;
 - Secretarial & Related Occupations;
 - Elementary Occupations: Trades, Plant & Storage related;
 - Process, Plant & Machine Operatives;
 - Protective Service Occupations; and
 - Skilled Metal & Electrical Trades.

Projected Sector Shapes

Adjusters



Projected Changes to the Occupational mix

	2017	2038	Change
34 Culture, Media & Sports Occupations	2%	2%	16%
24 Business & Public Service Professionals	4%	4%	12%
35 Business & Public Service Associate Professionals	5%	6%	9%
53 Skilled Construction & Building Trades	4%	4%	8%
21 Science & Technology Professionals	4%	4%	7%
72 Customer Service Occupations	1%	2%	6%
62 Leisure & Other Personal Service Occupations	2%	3%	6%
11 Corporate Managers	6%	7%	5%
61 Caring Personal Service Occupations	9%	9%	5%
12 Managers / Proprietors in agriculture & services	4%	4%	5%
22 Health Professionals	4%	4%	4%
92 Elementary Occupations: Clerical & Services related	10%	10%	3%
51 Skilled Agricultural Trades	1%	1%	3%
32 Health & Social Welfare Associate Professionals	1%	1%	1%
71 Sales Occupations	6%	6%	-1%
82 Transport & Mobile Machine Drivers & Operatives	5%	4%	-6%
54 Textiles, Printing & Other Skilled Trades	3%	3%	-6%
31 Science & Technology Associate Professionals	1%	1%	-6%
41 Administrative Occupations	9%	8%	-8%
23 Teaching & Research Professionals	5%	4%	-8%
42 Secretarial & Related Occupations	2%	2%	-10%
91 Elementary Occupations: Trades, Plant & Storage related	2%	2%	-15%
81 Process, Plant & Machine Operatives	4%	4%	-18%
33 Protective Service Occupations	1%	1%	-19%
52 Skilled Metal & Electrical Trades	4%	4%	-22%

Inclusive growth

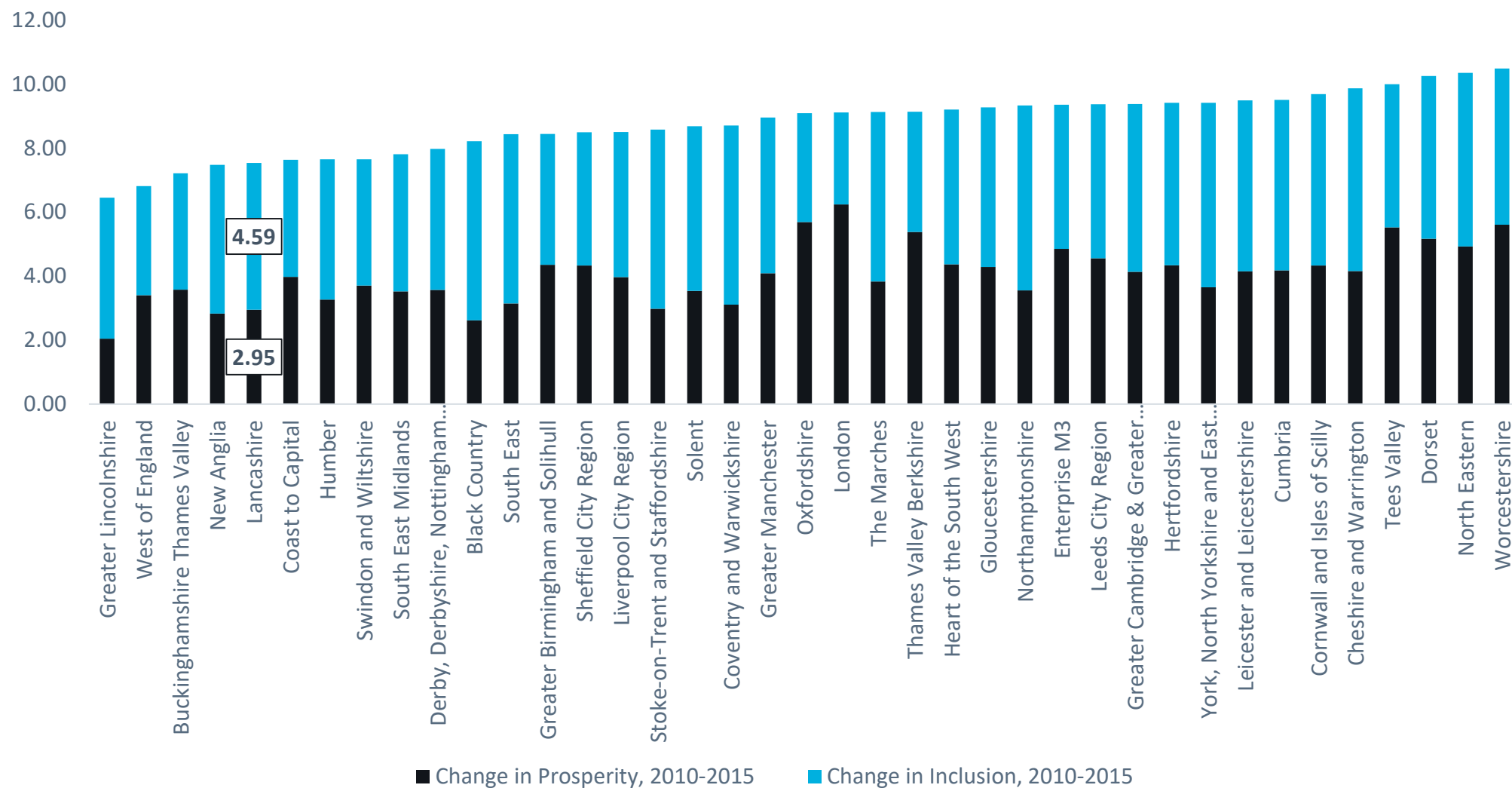
- Colleagues at the universities of Sheffield and Manchester developed the Inclusive Growth Monitor for the Joseph Rowntree Foundation.
- It uses a range of indicators to assess both prosperity and economic inclusion – see table opposite.
- These are weighted to reflect their importance to the index.
- To devise the scores each indicator is normalised so that the LEP with the best outcome for a given indicator receives a score of 1 and the LEP with the worst outcome receives a score of 0. Each dimension (containing three indicators) notionally has a maximum score of 3 and a minimum score of 0. Each theme (containing three dimensions) has a notional maximum score of 9 and a minimum score of 0.
- To assess change over time normalised change scores are calculated based on the percentage change on the underlying indicator scores between 2010 and 2015.
- The next slide shows change data for Local Authority Partnership areas.
- The chart shows that Lancashire has some way to go both in terms of prosperity and economic inclusion relative to other LEP areas.
- It should be noted that these are relative scores – they do not necessarily reflect absolute changes in worklessness or fuel poverty, for example.

Measures of inclusive growth

Theme	Dimension	Broad Indicator
Economic Inclusion (Score 0 Min – 9 Max)	Income (Score 0 Min – 3 Max)	Out of work benefits
		In-work tax credits
		Low Earnings
	Living costs (Score 0 Min – 3 Max)	Housing affordability (ownership)
		Housing costs (rental)
		Fuel poverty
	Labour Market Inclusion (Score 0 Min – 3 Max)	Unemployment
		Economic Inactivity
		Workless households
Prosperity (Score 0 Min – 9 Max)	Output Growth (Score 0 Min – 3 Max)	Output (GVA/capita)
		Private sector businesses
		Wages/earnings
	Employment (Score 0 Min – 3 Max)	Workplace jobs
		People in employment
		Employment in high-tech sectors
	Human Capital (Score 0 Min – 3 Max)	Higher level occupations
		Intermediate and higher level skills
		Educational attainment

Source: Inclusive Growth Monitor, 2017: Local Enterprise Partnerships, Inclusive Growth Analysis Unit, University of Manchester

Inclusivity in economic performance, change over time



Source: Inclusive Growth Monitor, 2017: Local Enterprise Partnerships, Inclusive Growth Analysis Unit, University of Manchester

Inclusivity in economic performance, 2015

Theme	Dimension (Score 0 Min – 3 Max)	Broad Indicator (Score 0 Min – 1 Max)	Lancashire	Cheshire & Warrington	Cumbria	Greater Manchester	Liverpool City Region
Economic Inclusion (Score 0 Min – 9 Max)	Income	Out of work benefits	0.33	0.75	0.58	0.33	0.00
		In-work tax credits	0.07	0.60	0.53	0.20	0.20
		Low Earnings	0.07	0.37	0.19	0.23	0.16
	Living costs	Housing affordability (ownership)	0.96	0.76	0.94	0.93	0.98
		Housing costs (rental)	0.95	0.88	0.96	0.87	0.93
		Households in fuel poverty	0.48	0.69	0.33	0.50	0.41
	Labour Market Inclusion	Unemployment	0.75	1.00	0.75	0.25	0.25
		Economic Inactivity	0.18	0.55	0.73	0.27	0.00
		Workless households	0.40	0.60	0.60	0.33	0.00
Prosperity (Score 0 Min – 9 Max)	Output Growth	Output (GVA/capita)	0.09	0.49	0.20	0.16	0.08
		Private sector businesses	0.30	0.64	0.86	0.22	0.00
		Wages/earnings - FT workers	0.21	0.28	0.40	0.27	0.29
	Employment	Workplace jobs - Jobs density	0.30	0.87	0.70	0.30	0.03
		People in employment	0.31	0.77	0.77	0.23	0.00
		Employment in high-tech sectors	0.47	0.42	0.11	0.58	0.63
	Human Capital	Higher level occupations	0.21	0.48	0.07	0.28	0.28
		Intermediate and higher level skills	0.55	0.82	0.68	0.59	0.55
		Educational attainment at GCSE/KS4	0.33	0.50	0.33	0.22	0.11

Source: Inclusive Growth Monitor, 2017: Local Enterprise Partnerships, Inclusive Growth Analysis Unit, University of Manchester

Policy environment and external drivers of change

Policy environment and external drivers of change

Key global technology drivers

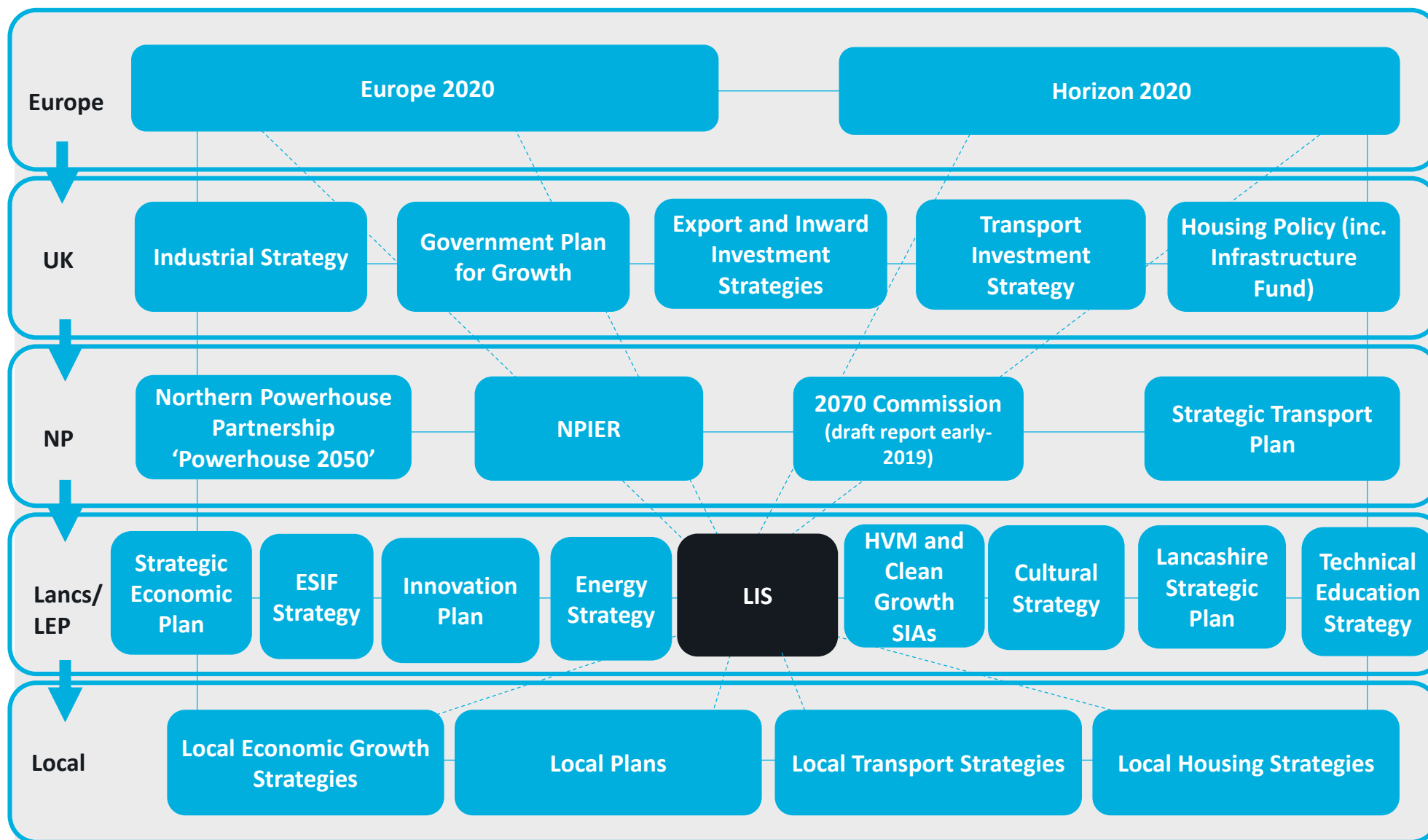
- The McKinsey Global Institute has highlighted a number of key disruptive technologies that will drive change in economies, including:
 - Ubiquitous connectivity leading to the creation of new products, services and processes across all sectors/markets;
 - Cloud technology enabling the growth of internet-based services;
 - The 'Internet of Things' driving demand for additional functionality in a wide range of items as well as helping generation of new processes, products, and services;
 - The automation of 'knowledge work' removing roles which were previously regarded as the sole domain of humans;
 - Advanced Materials, with a wide range of functions and properties in many markets, including health, energy, transport and engineering;
 - Advanced Robotics changing production processes and logistics based on advances in machine vision, artificial intelligence, machine-to-machine communication, sensors and actuators;
 - Autonomous/near-autonomous vehicles, e.g. drones, submersibles, cars and trucks will revolutionise transportation and logistics;
 - 3D Printing/additive manufacturing allows on-demand production for consumers as well as business-to-business applications;
 - Next-Generation Genomics will use big data analytics in the sequencing and modification of genetic material, helping to revolutionise human health care and animal/plant agriculture;
 - Advanced Oil and Gas Exploration and Recovery, making possible the extraction of oil and gas from previously unexploitable reserves;
 - Renewable Energy will enable energy generation without contributing to man-made climate change; and
 - Energy Storage technologies, e.g. lithium-ion batteries and fuel cells, will transform the scope for electric and hybrid vehicles, and may transform the scale at which renewables are able to meet demand for electricity.

Key national and local policy issues

- Lancashire's economy is:
 - Engaged in key global supply chains and export markets, its short and medium term prospects will be affected by the Brexit process - including aerospace and automotive sectors, as well as agriculture and food and drink sectors and the visitor economy;
 - Affected by UK energy policy – particularly in relation to nuclear energy, shale gas, and renewable energy (including wind and tidal energy); and
 - Will be affected by UK policy on climate change, including climate change mitigation (e.g. adaptation of existing industries to meet net-zero carbon by 2050 or sooner), and climate change adaptation, e.g. water risk management.
- The following slide depicts a policy hierarchy that outlines key European, UK, Northern Powerhouse, Lancashire LEP and district level policies.
- The hierarchy highlights key documents and statements that the LIS needs to reflect and to which it must respond.
- Key Lancashire-level strategies which are driving activity at the local level and upon which the LIS will build include the:
 - Lancashire Innovation Plan;
 - Cultural Strategy; and
 - Technical Education Strategy.
- Work on the Strategic Plan is being undertaken concurrently with the LIS – the two process will inform each other, e.g. in terms of assumptions around land use and location of developments.

Policy hierarchy

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Business Environment

Introduction

Outline of this section

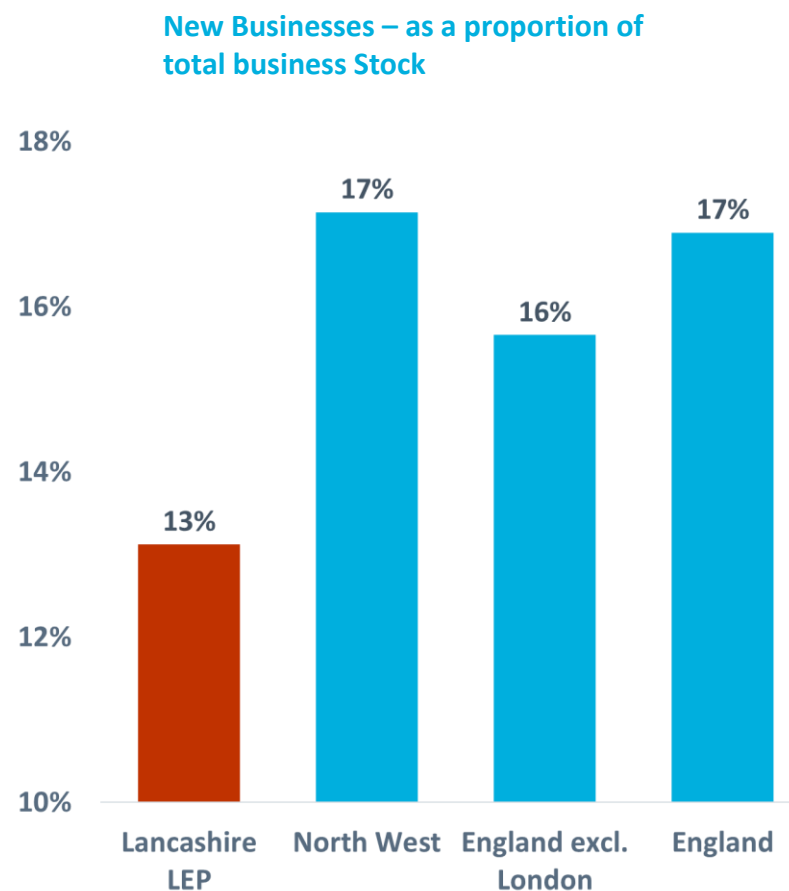
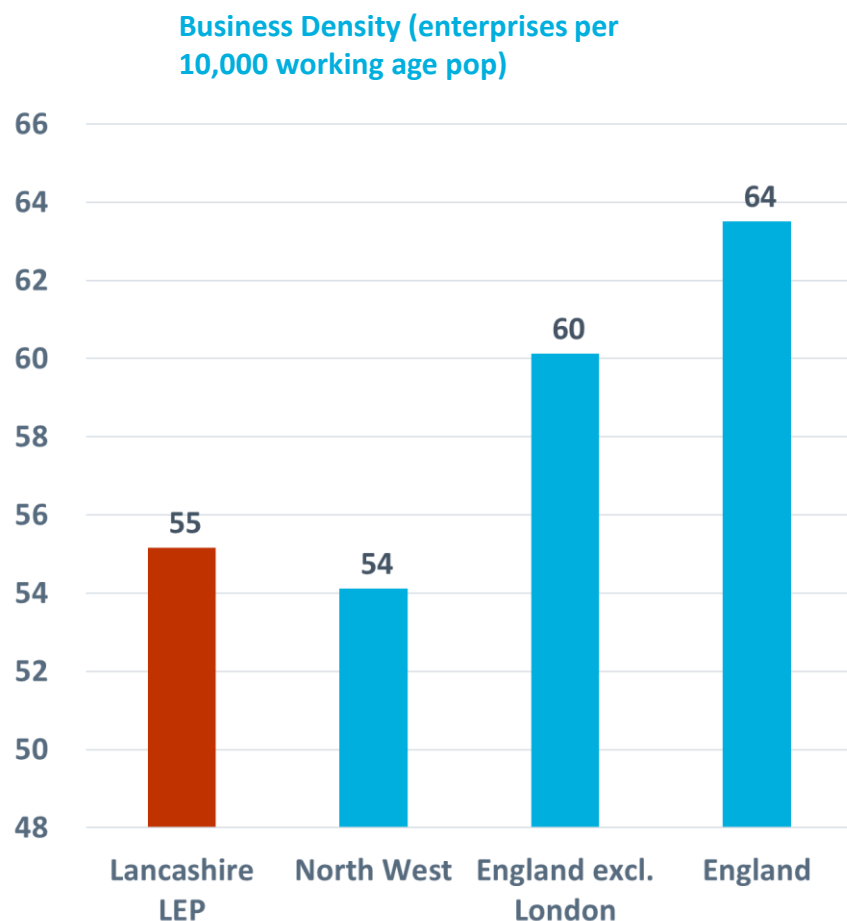
- This section provides an overview of Lancashire's business environment. It covers:
 - Business density
 - Business start-up and survival rates – including variations between Local Authority Districts
 - Scale-up data on fast-growing businesses
 - Sectoral mix – including variations between Local Authority Districts
 - Business population by size of business
 - Export activity – as data permit
 - Supply chains – [NB: evidence to be gathered]
- It also draws on the:
 - Lancashire Local Enterprise Partnership, Strategic Economic Plan
 - Enterprise Research Centre's, UK Local Growth Dashboard, 2018

Key messages

- Business density in Lancashire is marginally higher than the North West average but it is lower than that of England.
- The proportion of the business stock that is made up of new businesses is significantly lower in Lancashire relative to regional and national rates.
- On the whole, Lancashire's Local Authority Districts underperform in terms of business births and 5-year survival rates, when compared to the England average – however, the picture of business births and business survival varies significantly between Local Authority Districts.
- In terms of fast-growing Scale-up businesses, Lancashire outperforms the England average for Scale-ups from <£500k to £1m, but underperforms relative to England for businesses that are moving from £1-2m to £3m+.
- A smaller proportion of Lancashire's business are micro-businesses than in England and North West – conversely, a higher proportion of its businesses employ 10-49 staff.
- Lancashire's economy has a specialism in manufacturing, a relatively high concentration of public sector activity, a low concentration of high-value added service activities – however there are significant variations in industrial structure between Lancashire's Local Authority Districts.
- Data on exports at local authority level are limited, experimental data on service exports show that Lancashire performs strongly on service exports as a proportion of its GVA.

Business density relative to regional and national averages

- There are 52,070 businesses in Lancashire, 260,060 businesses across the North West, and 2.3m businesses across England as a whole.
- Business density in Lancashire is marginally higher than the North West average but is significantly lower than the England average.
- The proportion of the business stock made up of new businesses is significantly lower in Lancashire relative to regional and national rates – indicating a relative lack of entrepreneurial activity in Lancashire.



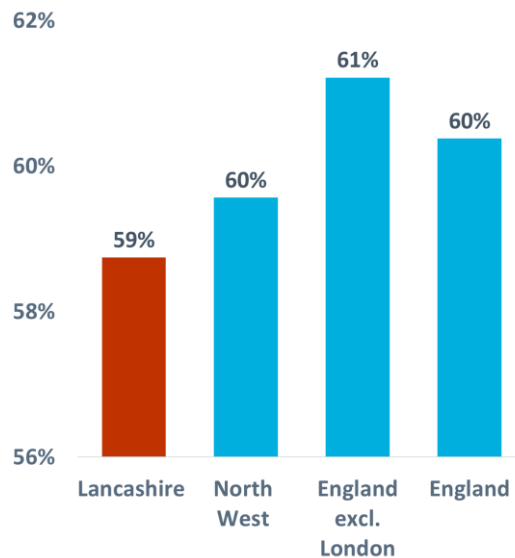
Source: UK Business Counts & Mid Year Population Estimates, 2016 & Business Demography ONS, 2011

Business survival and Scale-ups

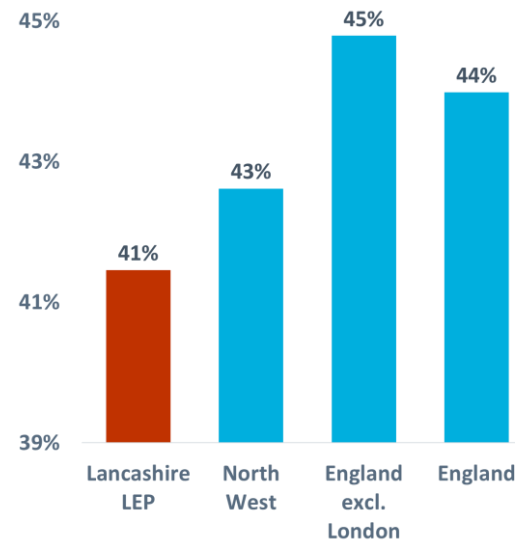
Business survival rates at 3 and 5 years

- Lancashire lags slightly behind the North West and England in terms of its business survival rate at 3 years
- Its relative performance is weaker in relation to business survival after 5 years – where it sits three percentage points behind the England average.

Three year business survival



Five year business survival



Source: Business Demography & Business Counts, ONS 2010-2016

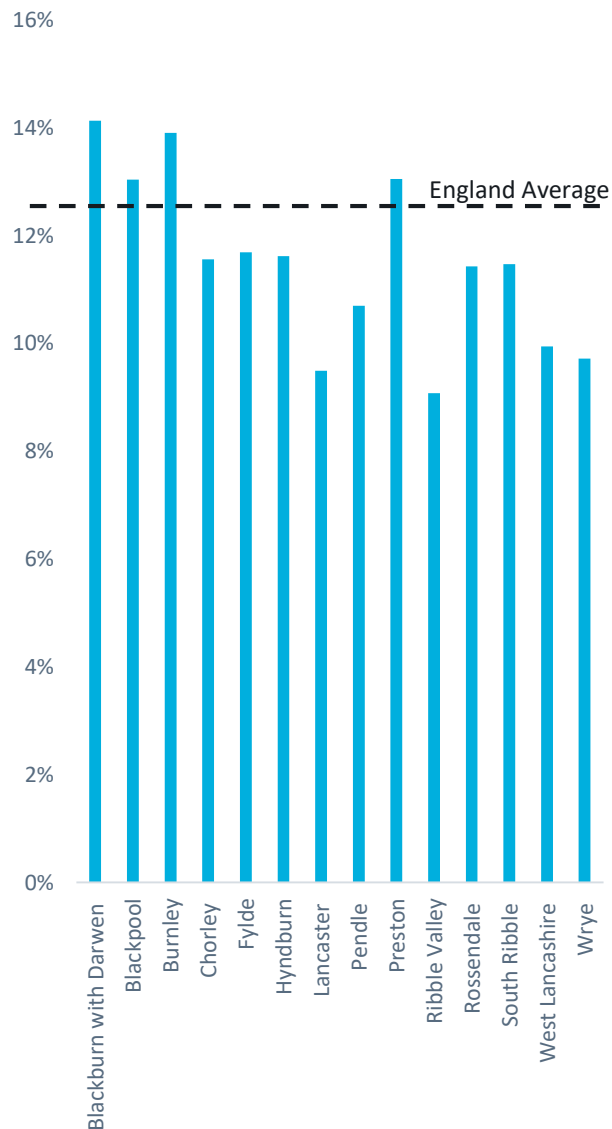
NB: Figures rounded to the nearest percentage point.

Scale-ups

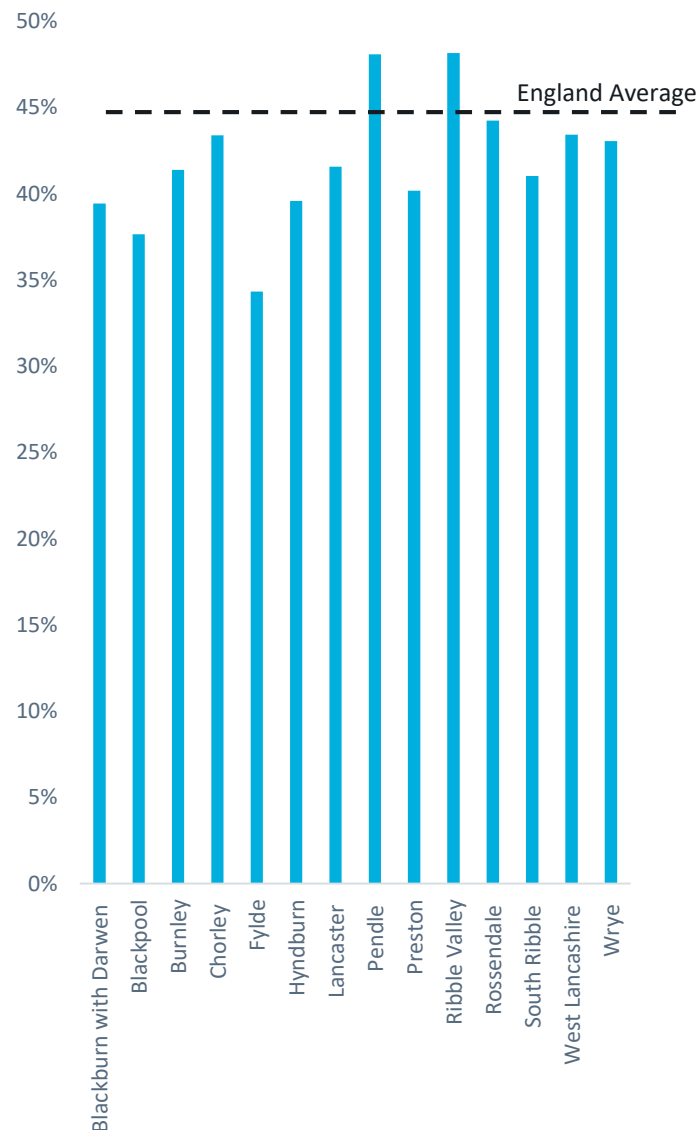
- The Enterprise Research Centre's UK Local Growth Dashboard draws on data from the Business Structure Database to highlight Scale-up performance (firms growing by 20% by employment a year over three years) by LEP area relative to the England average.
- The UK Local Growth Dashboards shows for 2017 :
- 2.3% of Start-ups Scaling <£500k to £1m + in 3 years 2014-17 (%) – relative to an England average of 1.9%; and
- 6.2% of Scaling Survivors £1-2m to £3m+ in 3 years 2014-17 (%) – relative to an England average of 7.5%.

New businesses across Lancashire's Local Authority Districts

Business Births as a % of Stock



5 Year Business Survival Rate



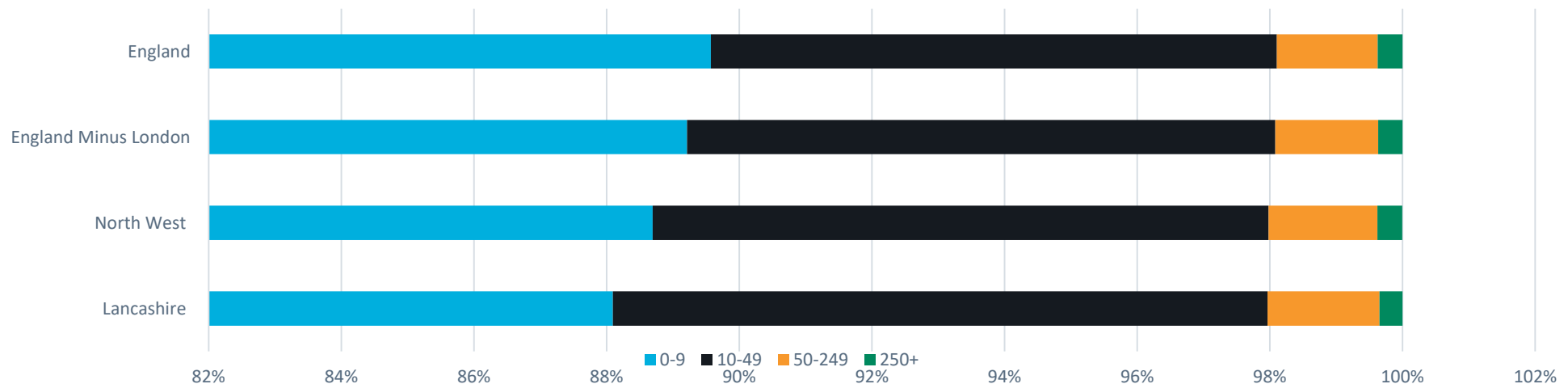
- On the whole, Lancashire's Local Authority Districts underperform in terms of business births and 5-year survival rates when compared to the England average.
- However, the picture of business births and business survival varies significantly between Lancashire's local authority districts.
- In terms of new businesses as a proportion of the total business stock, Blackburn with Darwen and Burnley outperform the England average.
- In terms of 5-year business survival, Ribble Valley and Pendle outperform the England average.

Source: Business Demography, ONS 2011 for 5 years

Business size

- Lancashire has a small proportion of micro-businesses when compared to any other assessed spatial level. These are often the source of fast growth – therefore Lancashire may be missing out on potential high-growth businesses

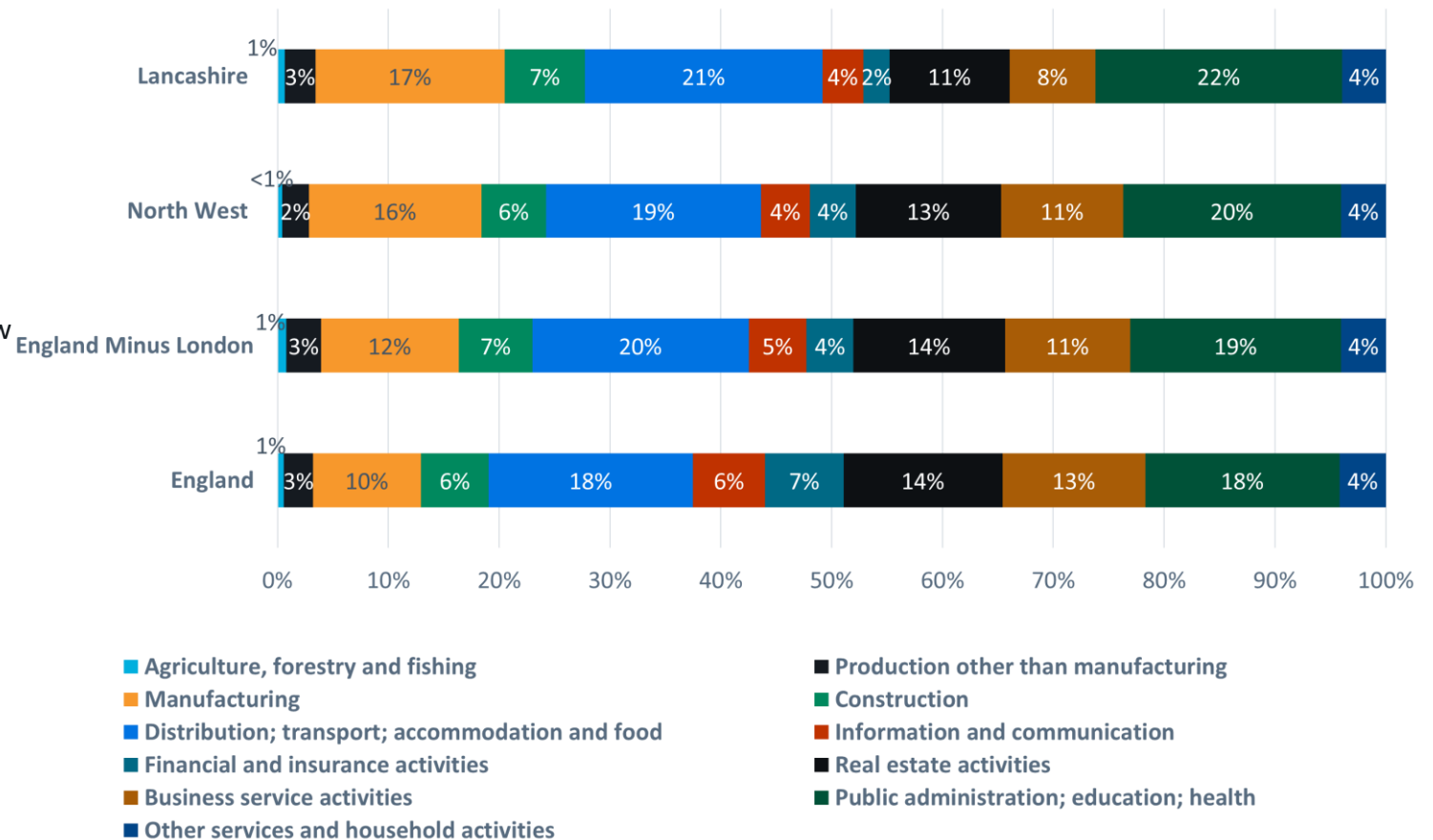
Proportion of businesses by employment size band



Key sectors

- Lancashire's GVA-driving sectors are broadly inline with North West averages.
- The county draws a large proportion of its GVA (60%) from its three largest sectors: Manufacturing; Distribution, transport, accommodation and food; & Public administration; education; health
- Lancashire also draws a relatively low proportion of its GVA from Business service activities.
- Thus, the economy has a specialism in manufacturing, a relatively high concentration of public sector activity, a low concentration of high-value added service activities.
- Although, in line with What Works Centre guidance, local partners note that industrial structure is not something that may be easily influenced through local intervention.

Share of GVA By Sector



Source: ONS Regional Accounts, 2015

Variation in sectoral mix between Local Authority Districts in Lancashire

Share of GVA By Sector



- Over 25% of GVA in Rossendale, Ribble Valley, Pendle, Fylde comes from the Manufacturing sector – well above the county average.

- In Lancaster, 12% of GVA comes from production other than manufacturing – compared to a county average of 3%.

- South Ribble has a particularly large construction sector – 20% of GVA compared to a county average of 7%.

Wyre, Ribble Valley, Pendle and Hyndburn have small business services sectors – less than 5% of GVA compared to a county average of 8%.

- In Preston and Blackpool over 30% of GVA comes from Public administration, education and health sector activities – compared to a county average of 22%.

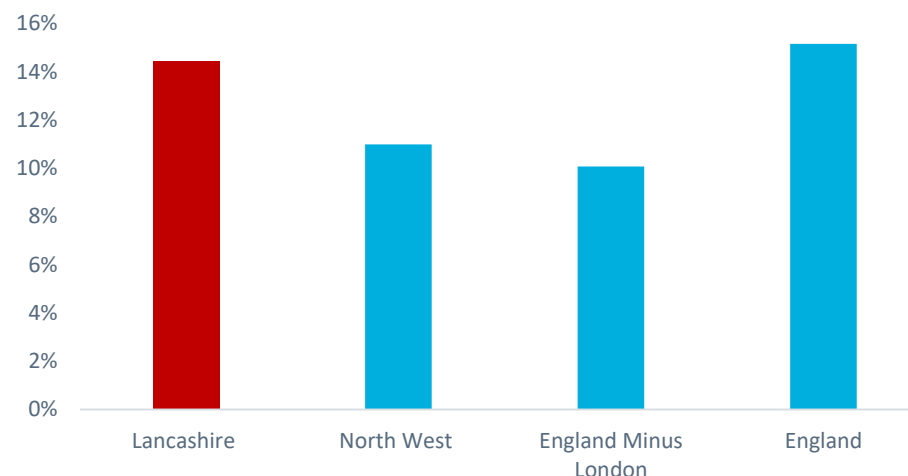
- Thus, local economic priorities are likely to vary between districts.

Source: ONS Regional Accounts, 2015

Exports and foreign ownership

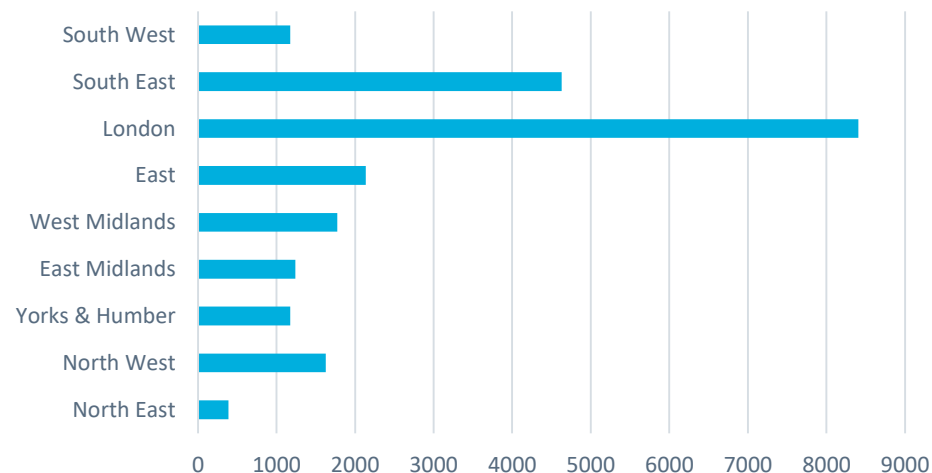
- Publicly available data on exports at the local authority level are limited.
- Experimental data on service exports show Lancashire performs strongly on service exports as a proportion of its GVA.
- Similarly, publicly available data on foreign ownership at local authority level is limited, regional data show the North West has the fourth largest number of foreign-owned businesses, after London, the South East and the West Midlands.
- Foreign ownership may be advantageous to an economy, as foreign-owned businesses tend to export more than domestic firms and can tap in to wider supply and innovation networks – however, in the current policy environment with uncertainty regarding international trade and investment arrangements, stakeholders have expressed a need to identify and mitigate risks associated with key investment decisions being taken overseas.

Service Exports as a Proportion of GVA



Source: The Pink Book International Trade in Services ONS 2016 & Regional GVA by Local Authority, ONS 2016

Number of foreign-owned businesses by Region



Source: VAT and/or PAYE based Enterprises by Country of Ultimate Foreign Ownership ONS, 2010

Business supply chains

NB: Further evidence is required.

Ideas



Introduction

Outline of this section

- This section reviews the innovation landscape in Lancashire. It provides an overview of:
 - Research, Development, Demonstrator and Innovation Assets including Higher Education Institutions;
 - Patent activity by sector;
 - University research performance;
 - University Commercialisation, Spin-offs, Knowledge Transfer Partnerships and Graduate Start-ups; and
 - Regional-level data on innovation active businesses and R&D spending by business and universities.
- It draws on national datasets, plus the:
 - Lancashire Innovation Plan, 2018;
 - North West Coastal Arc Partnership for Clean and Sustainable Growth Science and Innovation Audit, 2018 – a partnership led by Lancaster University, involving Merseyside, Cheshire, Staffordshire and North Wales;
 - Innovation North Progressing Innovation in the Northern Powerhouse, NP11 and Innovate UK, 2018; and
 - Lancashire Innovation Ecosystem Project – ongoing.

Key messages

- Lancashire is home to leading global businesses at the cutting edge of advances in Advanced Manufacturing, which are supported by a cluster of high-tech SMEs that are amongst the most productive in the country.
- Lancashire's manufacturing base is led by aerospace, automotive, and energy sectors, with additional strengths in digital and healthcare sectors.
- There are excellent examples of innovation in Lancashire's business base, including BAE Systems in the aerospace sectors and AMS Neve in digital/sound engineering.
- Lancashire is developing its innovation links with neighbouring cities, including but not limited to Manchester, Liverpool and Sheffield. An example of collaboration with Sheffield partners is the Advanced Manufacturing Research Centre North West.
- Lancashire's HEIs have research strengths in Allied Health Professions, Chemistry, Computer Science, Earth Systems and Environmental Sciences, General Engineering, Mathematical Sciences and Physics.
- IPO data show strong intellectual property advances in areas such as Civil Engineering, Mechanical Elements, Medical and Computer Technology, and Thermal Processes.
- Lancashire's strengths in industries at the forefront of Industry 4.0 and its participation in the Made Smarter Pilot in the North West mean that it is well-placed to capitalise on productivity improvements associated with increased automation and the adoption of new technology.
- Lancashire has an unusual mix of sectors and supply chains with (as yet untapped) potential to combine capabilities which may open up new competitive opportunities.

Innovation assets

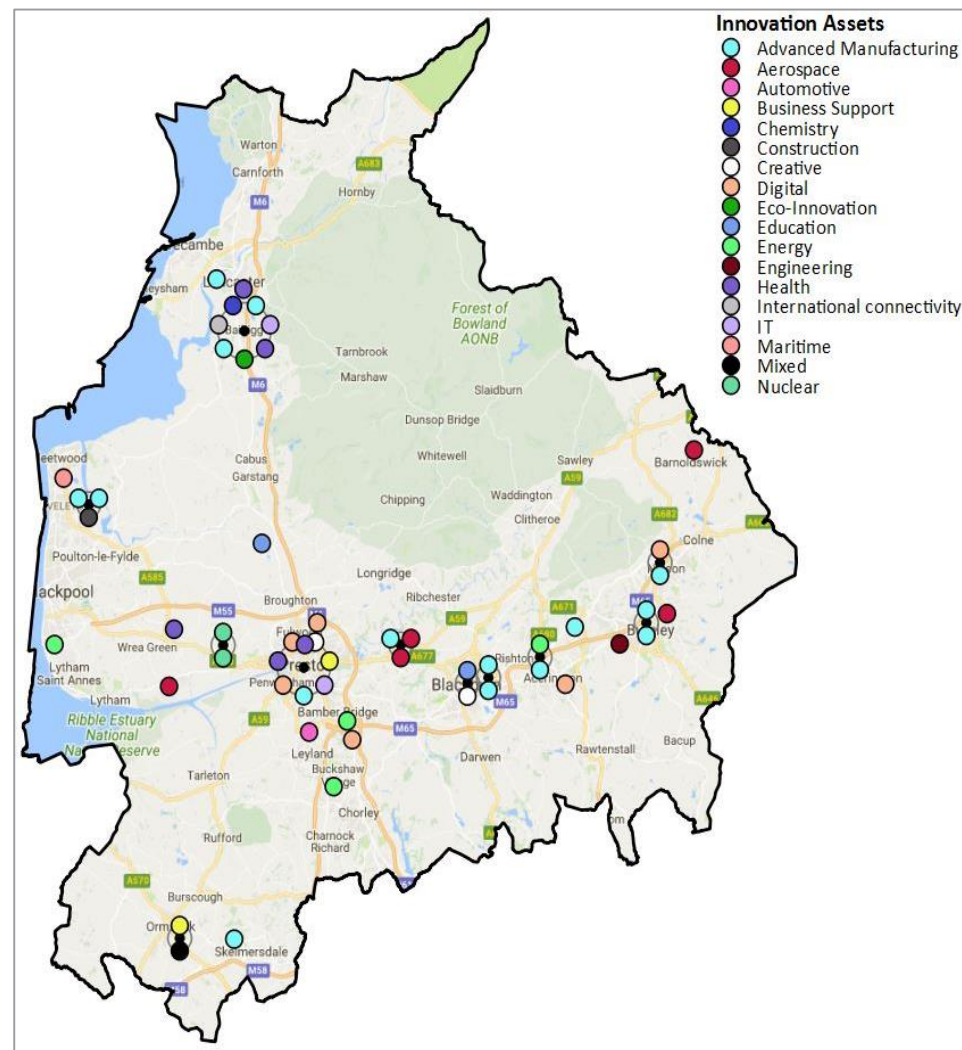
- Four universities operate in Lancashire – the table below shows how they rank in terms of different ranking schemes.
- The Lancashire Innovation Plan identifies: 54 innovation assets that support and enable innovation, which cover 16 sectors, including:
 - Advanced Manufacturing (15 assets);
 - Digital (6 assets);
 - Energy (5 assets);
 - Aerospace (5 assets); and
 - Health (5 assets).
- There is a concentration of assets along the West to East corridor (M55-M6-M65).
- There is a substantial concentration of assets around the Lancaster University and UCLAN Campuses.
- Digital assets appear to be disparately distributed, with no apparent signs yet of effective clustering.

Higher Education Institutions

	Times UK Ranking	Times World Ranking	QS World Ranking	REF Power Ranking	FTE Students	Intl Students
Lancaster University	6	=150	=135	25	11,637	38%
University of Central Lancashire	93	601-800	801-1000	74	16,500	18%
Edgehill University	61	-	-	96	-	-
Cumbria University	125	-	-	142	-	-

Source: The Times/The Sunday Times: Good University Guide 2018, Times Higher Education World University Rankings 2018, QS World University Rankings 2018, REF 2014 Power Rankings

Lancashire's Innovation Assets

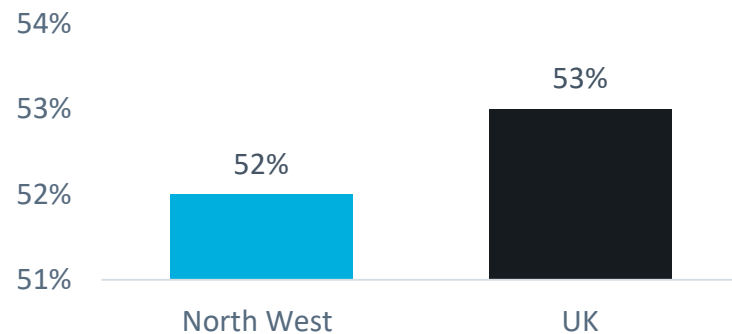


Source: Lancashire Innovation Plan, 2018

Patent applications

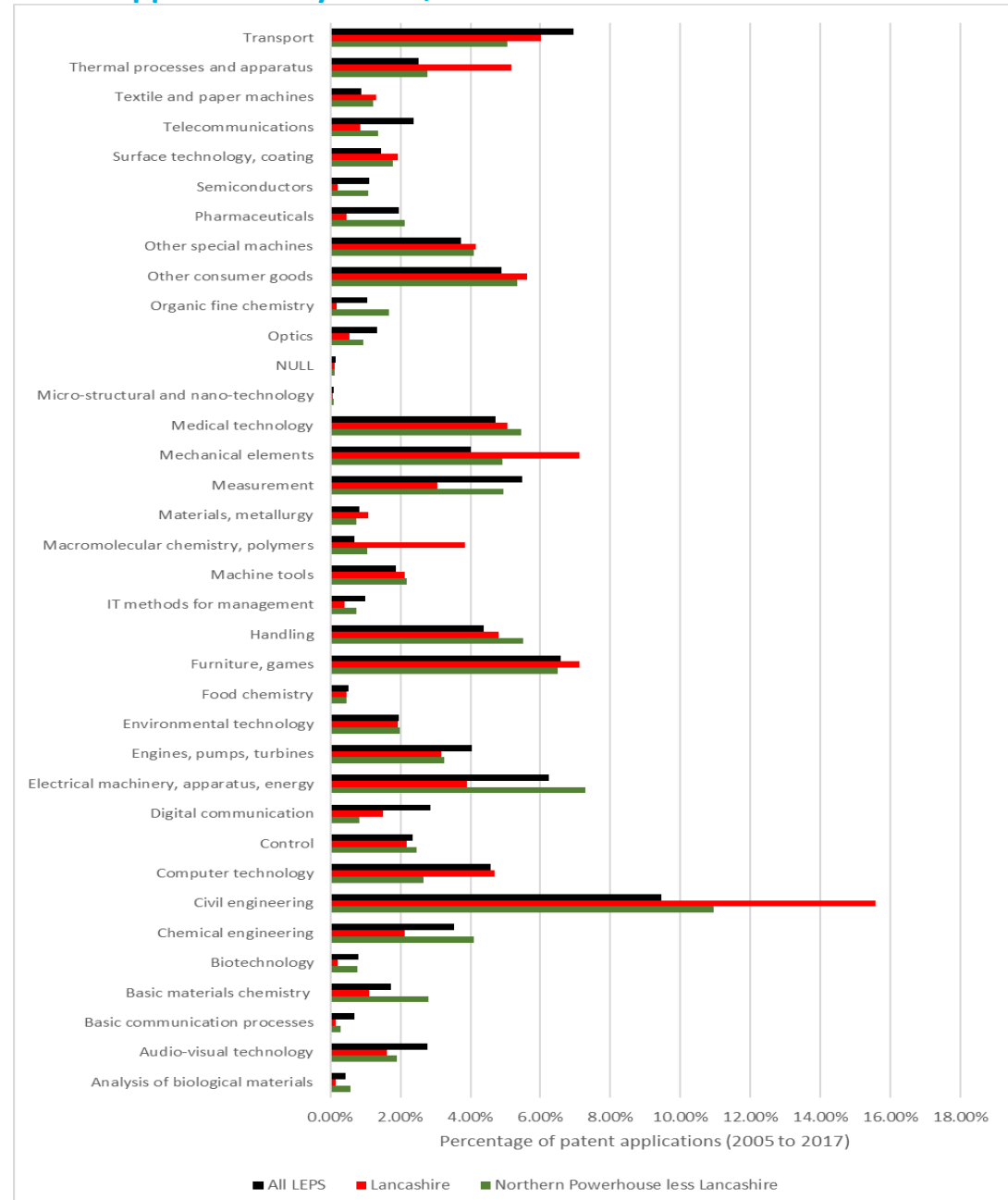
- Firms and research institutions based in Lancashire are actively developing patents across a broad range of sectors.
- Relative to other LEP areas, Lancashire has particular prominence in patents for:
 - Thermal Processes & Apparatus;
 - Mechanical Elements; and
 - Civil Engineering.
- With further strengths in Digital and Healthcare.
- It should be noted that these data capture 'local' patenting, which does not include patents from major multi-national corporations (MNCs) with registered HQs outside Lancashire, so these data understate the level of activity in Lancashire
- Data on innovation active businesses are only available at regional level – the North West is only marginally behind the UK average.

Innovation active businesses



Source: Innovation Active Enterprises, UK Innovation Survey 2015 (survey period 2012-2014)

Patent applications by sector, 2005 to 2017

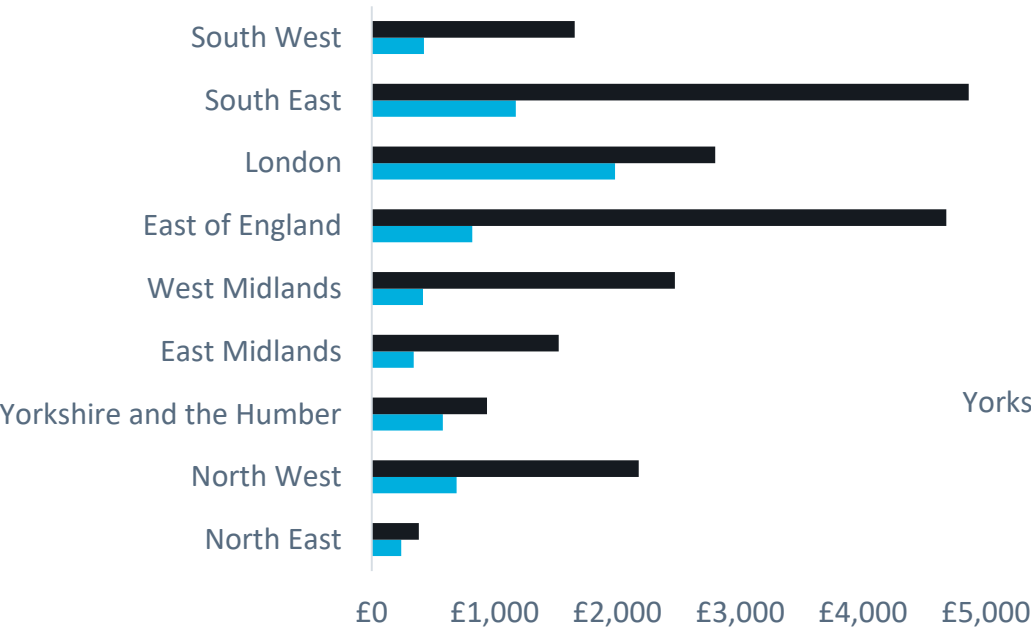


Source: IPO, 2017

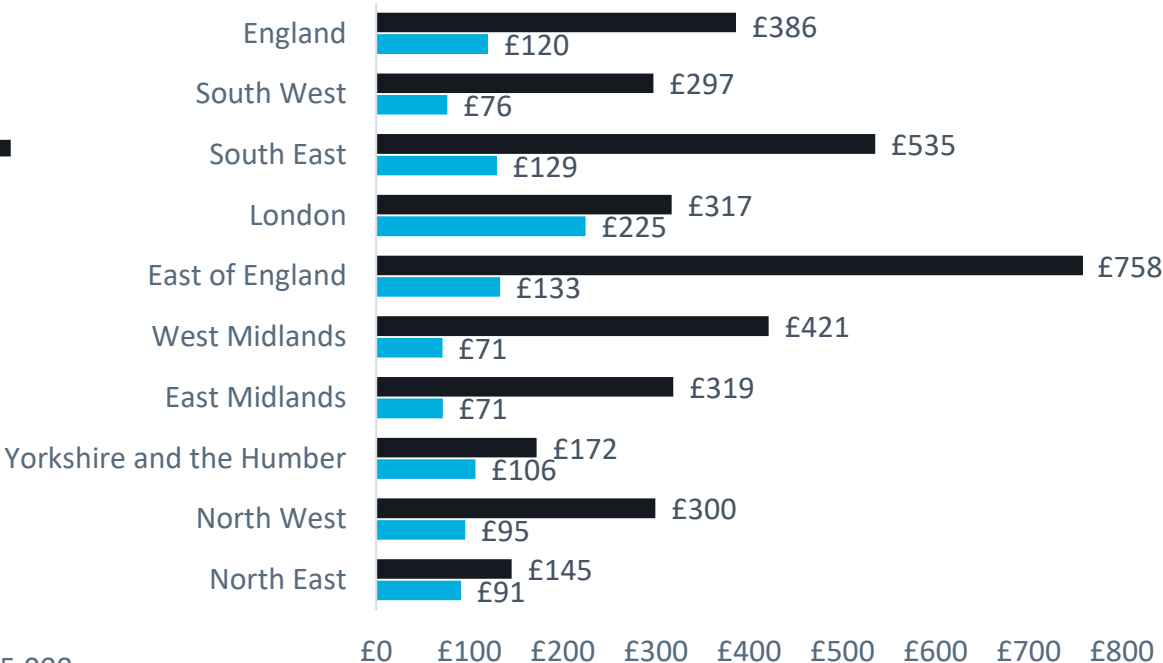
R&D Spend

- Data on R&D expenditure is available at regional level for university and business investment – this provides an indication of the levels of investment in R&D in Lancashire.
- It shows:
 - HE R&D investment per head is £95 – 80% of the England average; and
 - Business R&D investment per head is £300 – around 80% of the England average.
- Data on investment in R&D by government and charities is not available at the level of the NW due to issues of confidentiality.

Gross R&D Expenditure by Business and Higher Education



R&D Expenditure per person by Business and Higher Education



■ Business R&D Spend (£ million) ■ Higher Education R&D Spend (£ million)
 ■ Business R&D Spend per head ■ Higher Education R&D Spend per head

Source: ONS Country and regional breakdown of expenditure, 2017 and ONS Population Estimates 2019

University research performance

- As noted above, four universities operate in Lancashire:
 - Lancaster;
 - UCLAN;
 - Edge Hill; and
 - Cumbria.
- The Research Excellence Framework (2014) shows Lancashire's HEIs have significant research strengths.
- The high-rated subjects of relevance to the Industrial Strategy are:
 - Business & Management Studies;
 - Mathematical Sciences;
 - Allied Health Professions, Dentistry, Nursing & Pharmacy;
 - Computer Science & Informatics;
 - Earth Systems and Environmental Sciences;
 - Psychology, Psychiatry & Neuroscience;
 - Physics;
 - Chemistry; and
 - General Engineering.
- The next slide illustrates the universities' performance relative to the UK average.

Highest % of research (overall) rated 4* or above by subject & by university

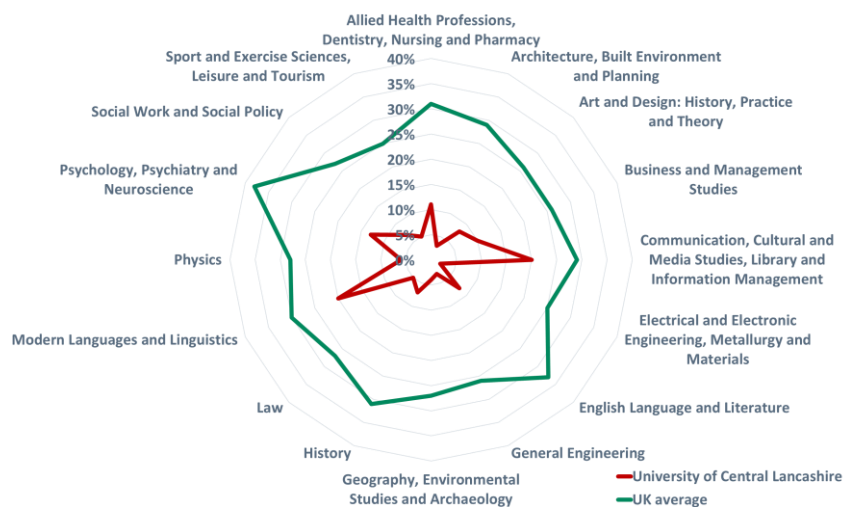
University	Subject	Average of 4* Research
Lancaster	Theology & Religious Studies	42%
Lancaster	Business & Management Studies	41%
Lancaster	English Language & Literature	40%
Lancaster	Mathematical Sciences	40%
Lancaster	Allied Health Professions, Dentistry, Nursing & Pharmacy	39%
Lancaster	Sociology	39%
Lancaster	Computer Science & Informatics	36%
Lancaster	Earth Systems & Environmental Sciences	32%
Lancaster	Art & Design: History, Practice & Theory	31%
Lancaster	History	30%
Lancaster	Psychology, Psychiatry & Neuroscience	29%
Lancaster	Law	28%
Lancaster	Education	25%
Lancaster	Physics	24%
Lancaster	Chemistry	20%
UCLAN	Communication, Cultural & Media Studies, Library & Information Management	20%
UCLAN	Modern Languages & Linguistics	20%
Lancaster	General Engineering	17%
Edge Hill	Psychology, Psychiatry & Neuroscience	15%
Cumbria	Sport & Exercise Sciences, Leisure & Tourism	14%
Edge Hill	Sport & Exercise Sciences, Leisure & Tourism	13%
UCLAN	Psychology, Psychiatry & Neuroscience	13%

Source: REF, 2014

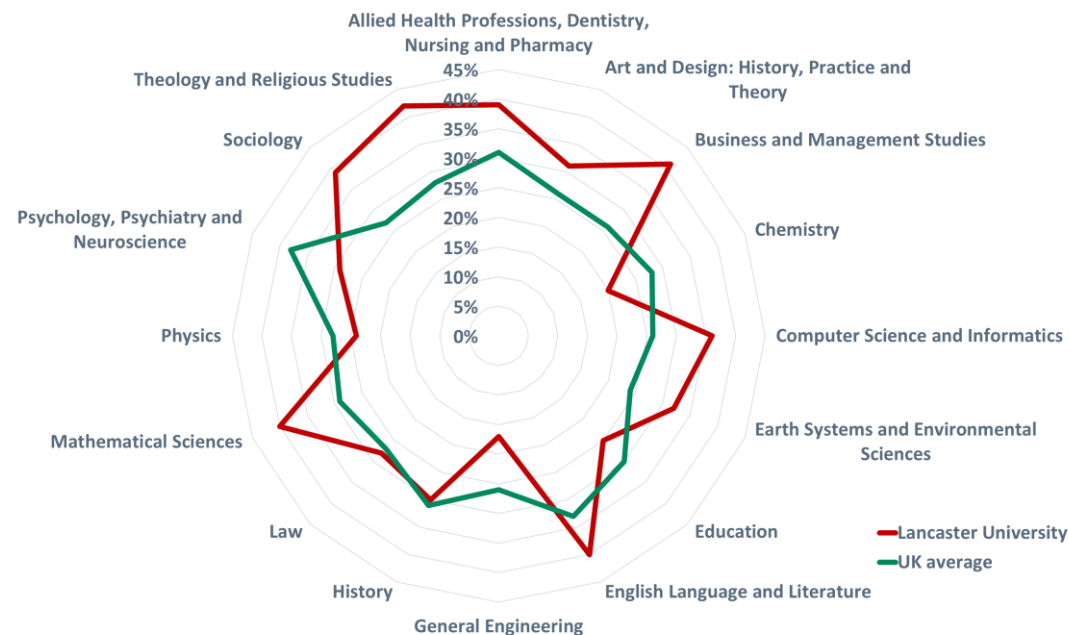
Research performance

% of research (overall) rated 4* or above by subject

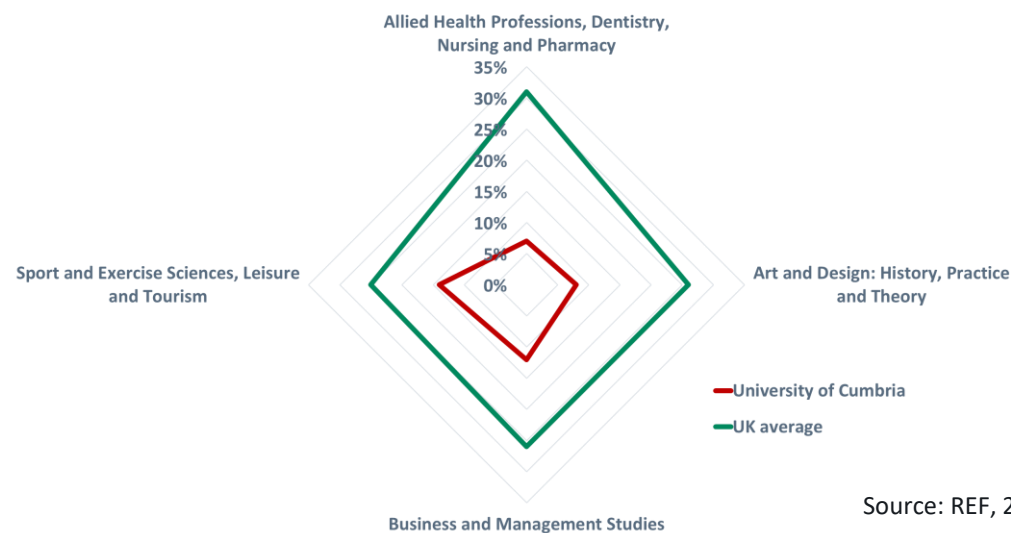
University of Central Lancashire (UCLAN)



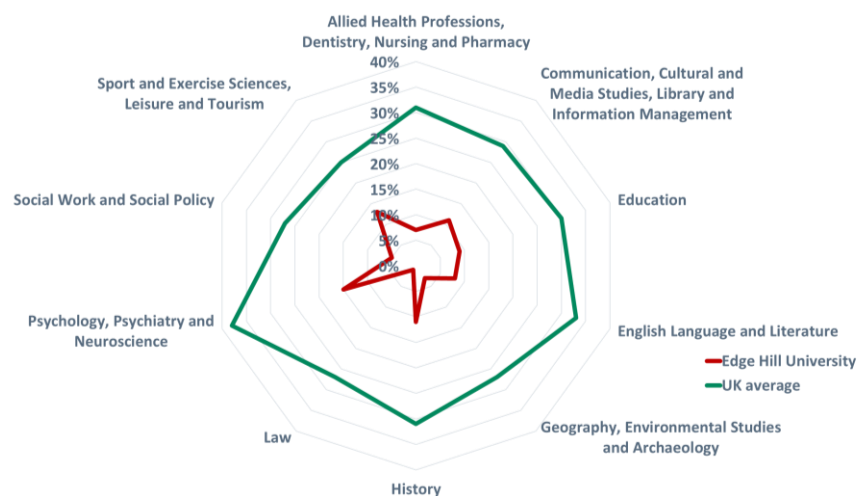
Lancaster University



University of Cumbria



Edgehill University

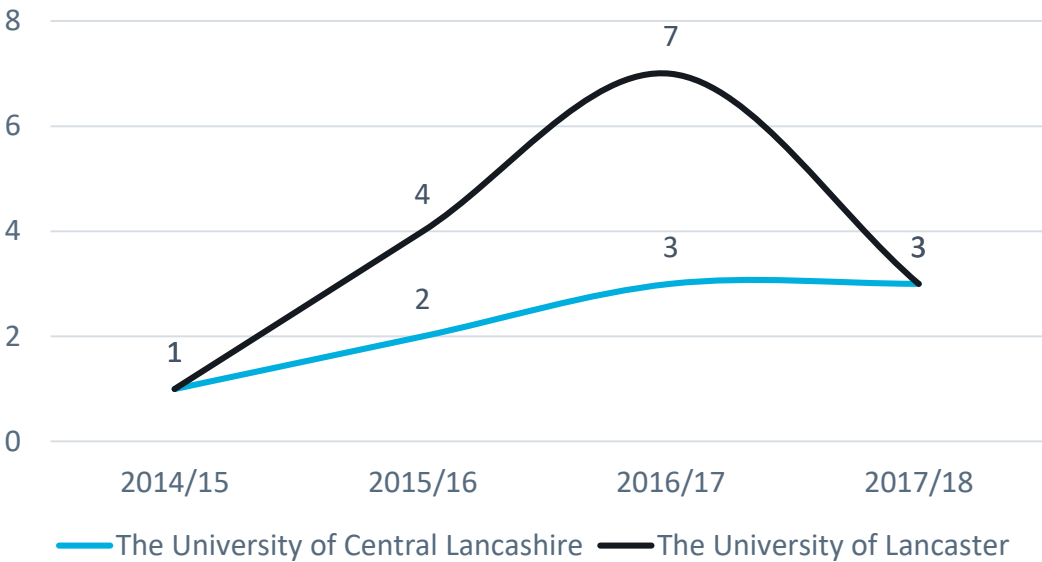


Source: REF, 2014

Universities and Intellectual Property

- Two of Lancashire’s universities, Lancaster and UCLAN, actively generate new IP.
- In 2017/18, UCLAN had 27 disclosures, i.e. research that may be commercially relevant and require a patent, and Lancaster identified 29.
- The generation of findings which may be patentable and then achieves a patent can take time and is ‘lumpy’ making year-on-year comparisons tricky. The range of patents granted each year for Lancaster is in the range of 1-7 and for UCLAN 1-3.
- Between the two universities there are 141 active patents in their portfolios.

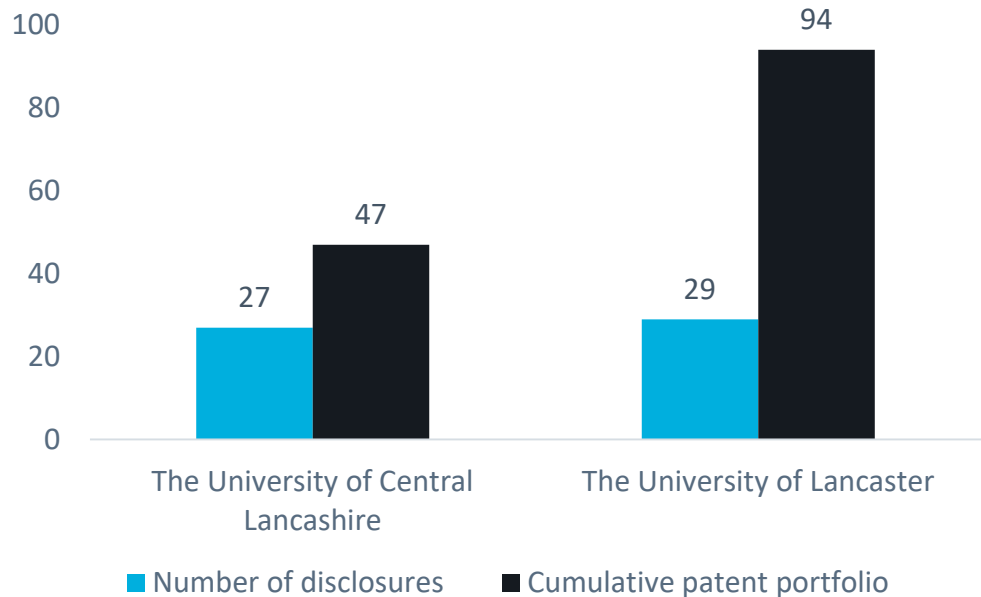
Granted number of patents by year



Source: HESA, 2014/15-2017/18

- In terms of driving GVA and growth, the key challenge for the universities is commercialisation of their research – the next slide provides a breakdown of the data on this.

Patent portfolio and number of disclosures by university



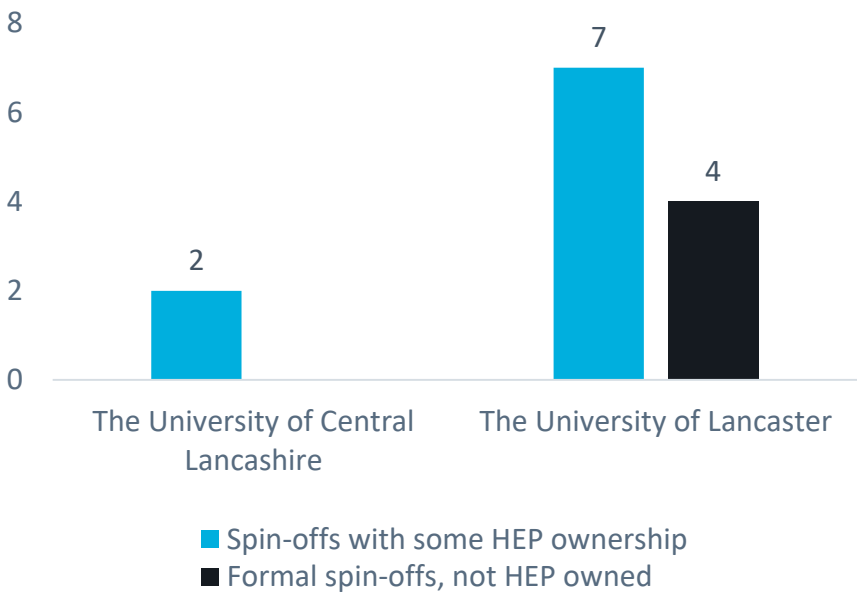
Source: HESA, 2017/18

Source: Lancashire Innovation Plan, 2018

Commercialising Research

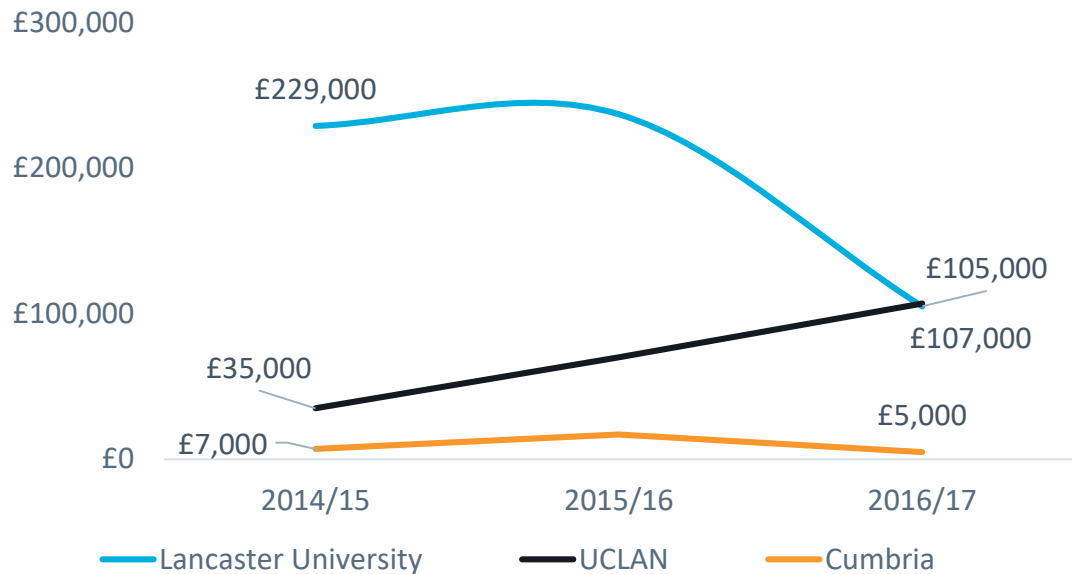
- University research is translated into commercial activity through spin-off companies or licensing.
- Data for 2017/18 show two active spin-offs for UCLAN and 11 active spinoffs for Lancaster – seven of which have at least some ownership with the university.
- To provide a comparison in terms of scale of activity, data for the University of Manchester show 14 active spinouts with university ownership and 12 with no university ownership, and data for the University of Liverpool show 12 active spinouts with some university ownership and 2 without.

Spinoff activity



Source: HESA, 2017/18

Intellectual property income (including patents, copyright, design, registration and trade marks) by university



Source: HESA, 2014/15-2016/17

- The above chart shows income from licensing for Lancaster, UCLAN and Cumbria universities.
- It shows significant variation from year to year – and income of a relatively modest scale.
- To provide a comparison in terms of scale, data for the University of Manchester show £1.65m in 2014/15, £3.6m 2015/16, £1.27m 2016/17 and data for the University of Liverpool show £361,000 in 2014/15, £524,000 in 2015/16 and £683,000 2016/17.

Supporting Business

KTPs

- Universities support the adoption and the spread of innovation via Knowledge Transfer Partnerships
- Lancashire has a strong KTP network – with 10 active KTPs and a track record of successful delivery

Knowledge Transfer Partnerships

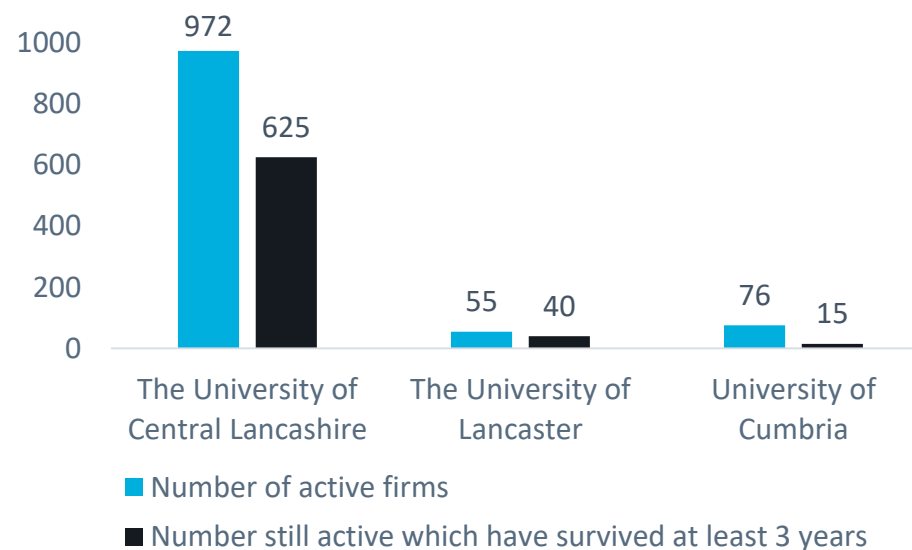
	Current KTPS	Total completed KTPs
Edge Hill University	1	4
Lancaster University	7	43
University of Central Lancashire	2	48
University of Cumbria	0	15

Source: Knowledge Transfer Partnerships Database , InnovateUK (Accessed 05/19)

Graduate entrepreneurship

- Universities in Lancashire have a good track record in graduate entrepreneurship – UCLAN has one of the best records in the country in terms of graduate start-ups.
- Graduate start-ups include all new businesses started by recent graduates (within two years of graduation) regardless of where any IP resides, but only where there has been formal business/enterprise support from the HE provider

Graduate start-ups

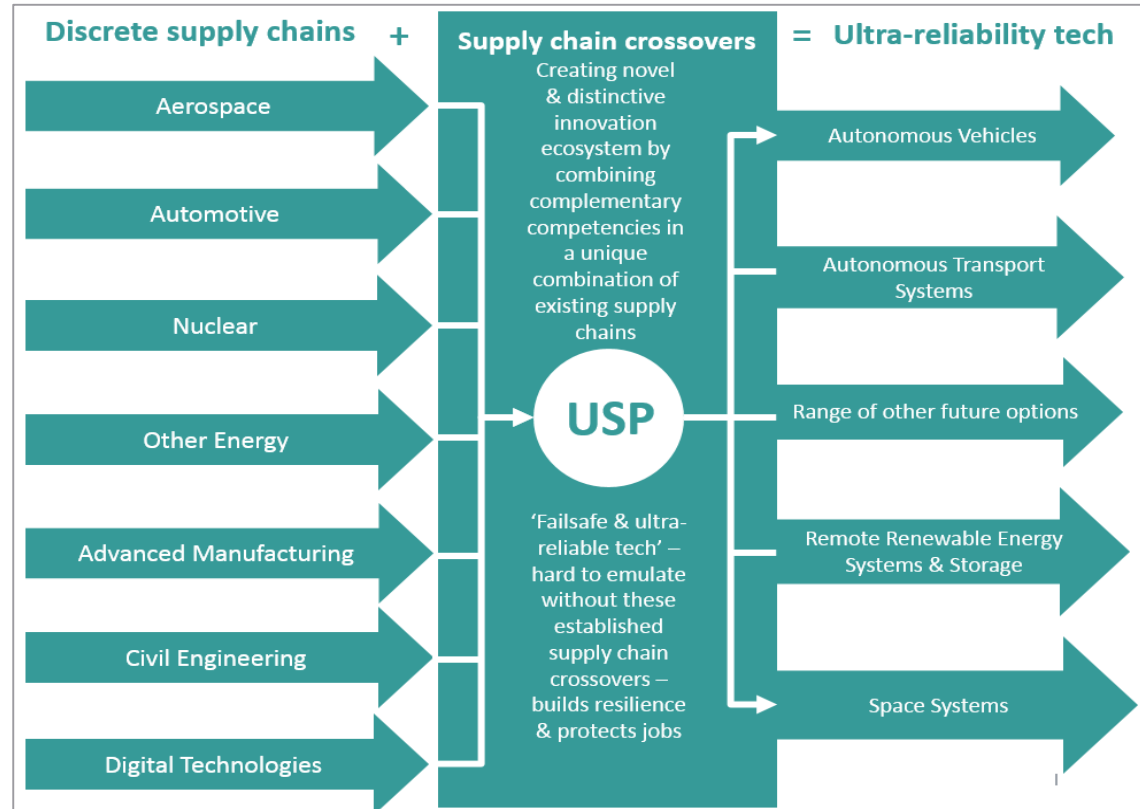


Source: HESA, 2017/18

Supply-chain strengths and innovation opportunities

- Given its mix of industrial sectors, supply chains, and research strengths, plus the technology drivers, which are driving convergence across many sectors, as a result of the digital economy, Lancashire is ideally placed to generate innovative products, services and process across of range of industrial and consumer markets.
- The Lancashire Innovation Plan argues that partnerships and collaboration between businesses and the knowledge base, as well as with Centres of Excellence, within and outside Lancashire should be a focus of innovation activity.
- The Plan goes on to argue that the activity should focus on crossovers between sectors and supply chains where there is untapped potential to combine capabilities which may open up new competitive opportunities
- The figure opposite provides an illustration of Lancashire's existing supply-chain strengths which, for example, could be developed to produce a new capability in 'ultra-reliable technologies'.

An example of how supply-chain strengths and opportunities may be combined...



Source: Lancashire Innovation Plan, 2018

People



Introduction

Outline of this section

- This section covers the size, occupational mix, qualifications and skills of Lancashire's current workforce and projected future requirements.
- It draws on national datasets to look in turn at:
 - Employment rates;
 - Employment by sector;
 - Employment by Occupation;
 - Current skill shortages;
 - Potential sector and occupational changes to 2028;
 - Projected changes in demand for workers at different levels of skill;
 - Educational outcomes;
 - Subject choices of students in Further and Higher Education, as an indication of future talent flow; and
 - Current health as a potential cause of relatively low productivity.

Key messages

- Lancashire's employment rate is relatively good compared to regional and national averages. There are, however, significant variations in the employment rates achieved in different districts. Thus, there is untapped employment potential in the county.
- The employment rate appears to be more volatile than regional and national rates, indicating a need to build resilience in local economies and the workforce.
- Lancashire has a greater proportion of lower level occupations and fewer high-level occupations than the England.
- The largest sectors by employment are Wholesale & Retail Trade, Human Health & Social Work, Manufacturing, Education, and Accommodation & Food.
- Currently there are skills shortages in Skilled Trades, and Administrative and Clerical Staff.
- There are projected reductions in demand for process Plant and Machinery Operatives and Administrative and Secretarial Support.
- The challenge for the local economy in terms of those currently in work will be to reskill those who need to move sectors and upskill those who need to attain new roles in their current sector.
- The education system locally performs well in aggregate but this masks significant variation at the local level.
- STEM subjects are relatively popular with student studying at university, but there is a risk of a mismatch between the educational choices of students and the needs of the economy in the future.
- Some of Lancashire's Districts suffer above average sickness absence rates, which reduces worker productivity – health interventions as part of workforce development will help drive up productivity in some of the areas with relatively low worker productivity.

Employment Rate

Variation in the employment rate

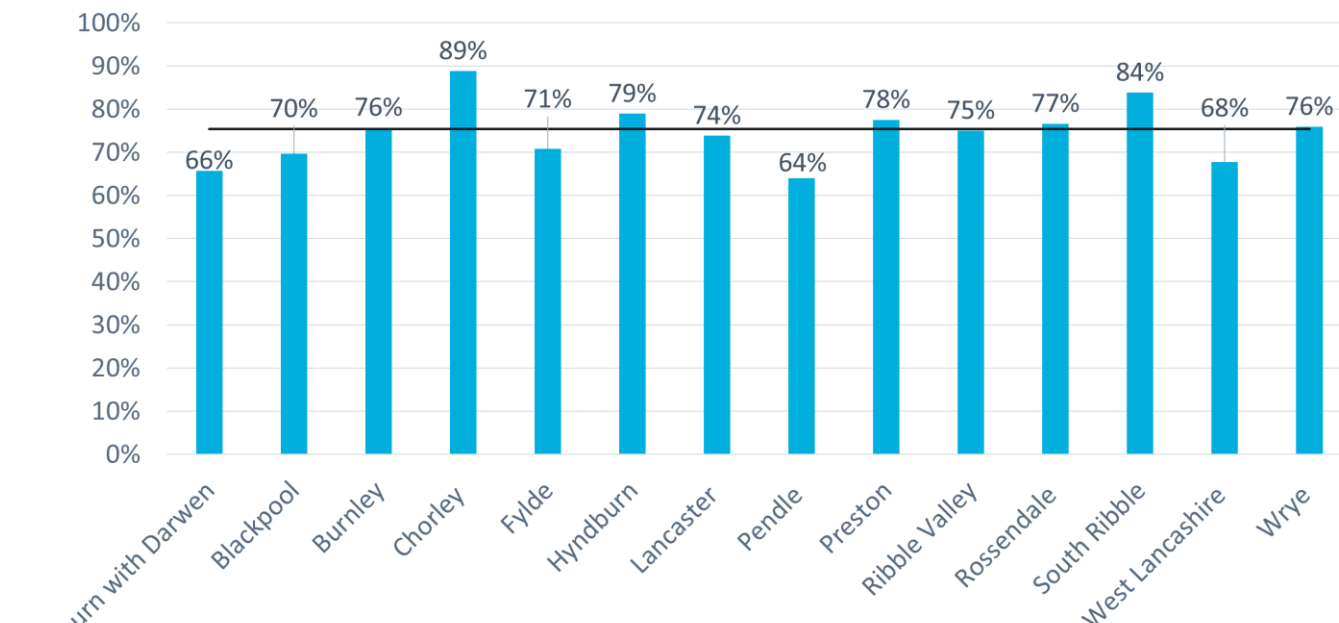
Variations by local authority

- The employment rate varies between Lancashire's Local Authority Districts with a number falling below (and a few significantly below) the England average, namely: Blackburn with Darwen, Blackpool, Fylde, Pendle and West Lancashire.
- A number of areas also outperform England in terms of the employment rate, most significantly Chorley and South Ribble (both areas have employment rates above 80%).

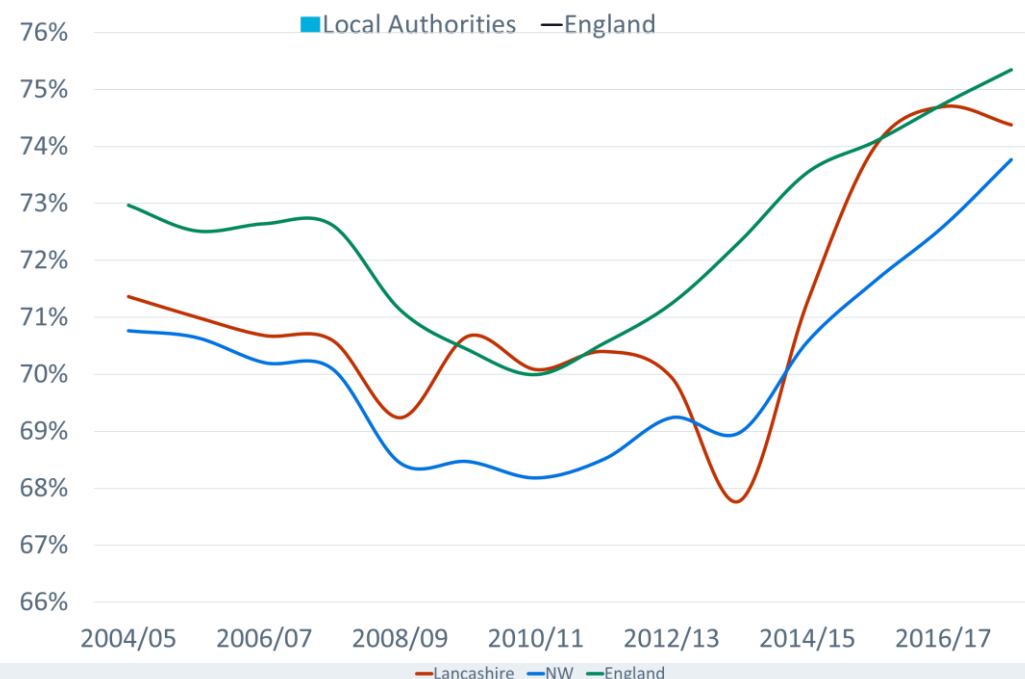
Variations over time

- The employment rate has fluctuated across time, with much of this variation accounted for by national economic trends. However, Lancashire's employment rate appears to be more volatile than North West and England trends.
- Following the 2008 recession, Lancashire initially recovered faster than national and regional averages. This was followed by a more severe second decline in 2013-14. However, Lancashire again recovered quickly with employment growth rates outpacing national and regional averages. More recent data show a tailing off of this growth.
- This pattern of volatility implies a need to build economic resilience.

% in Employment for aged 16-64



% in Employment aged 16-64 over time



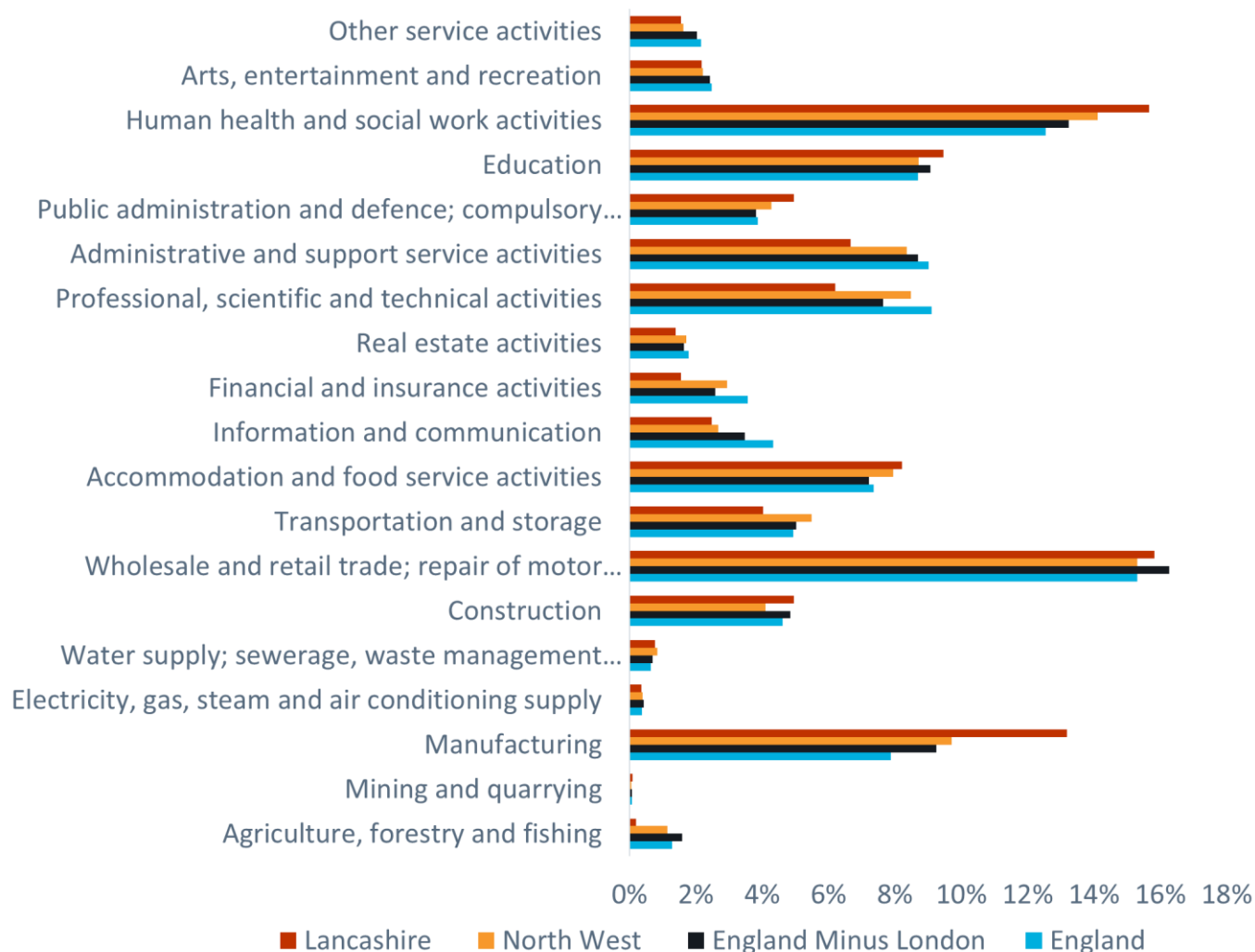
Source: Lancashire Labour Market Intelligence Toolkit, 2018

Employment by sector

- Lancashire's sectoral breakdown is distinct from the North West and England for the scale of 'human health and social work activities' and, more significantly, manufacturing in terms of employment numbers.
- Lancashire also has a relatively low proportion of employment in the 'financial and insurance activities' and 'information and communication' sectors.
- The county's largest sectors by employment are detailed in the table below.

Sector	% total jobs
Wholesale & Retail Trade	16%
Human Health & Social Work	16%
Manufacturing	13%
Education	9%
Accommodation & food	8%

Employment by sector

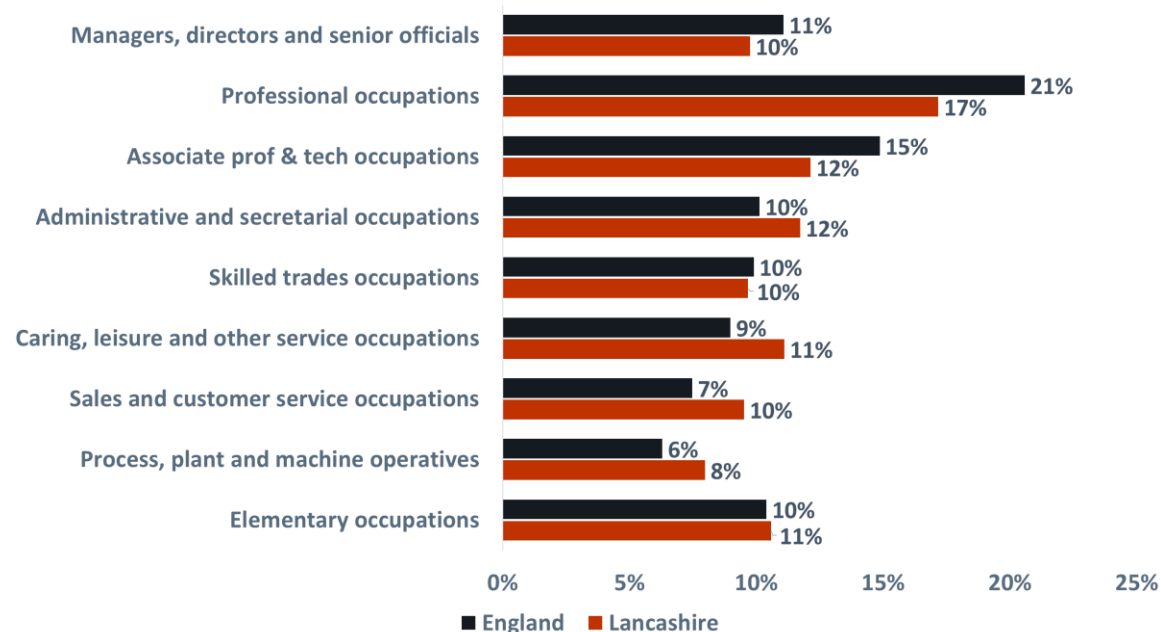


Source: BRES, 2016

Occupational breakdown

- An economy's occupational mix helps to determine the overall worker productivity and earnings.
- Compared to England, Lancashire has a larger proportion of employment in lower skilled occupations and a smaller proportion of employment in higher skilled occupations.
- This mix needs to shift if Lancashire's economy is to increase productivity and earnings.

Employment by occupation, 2018

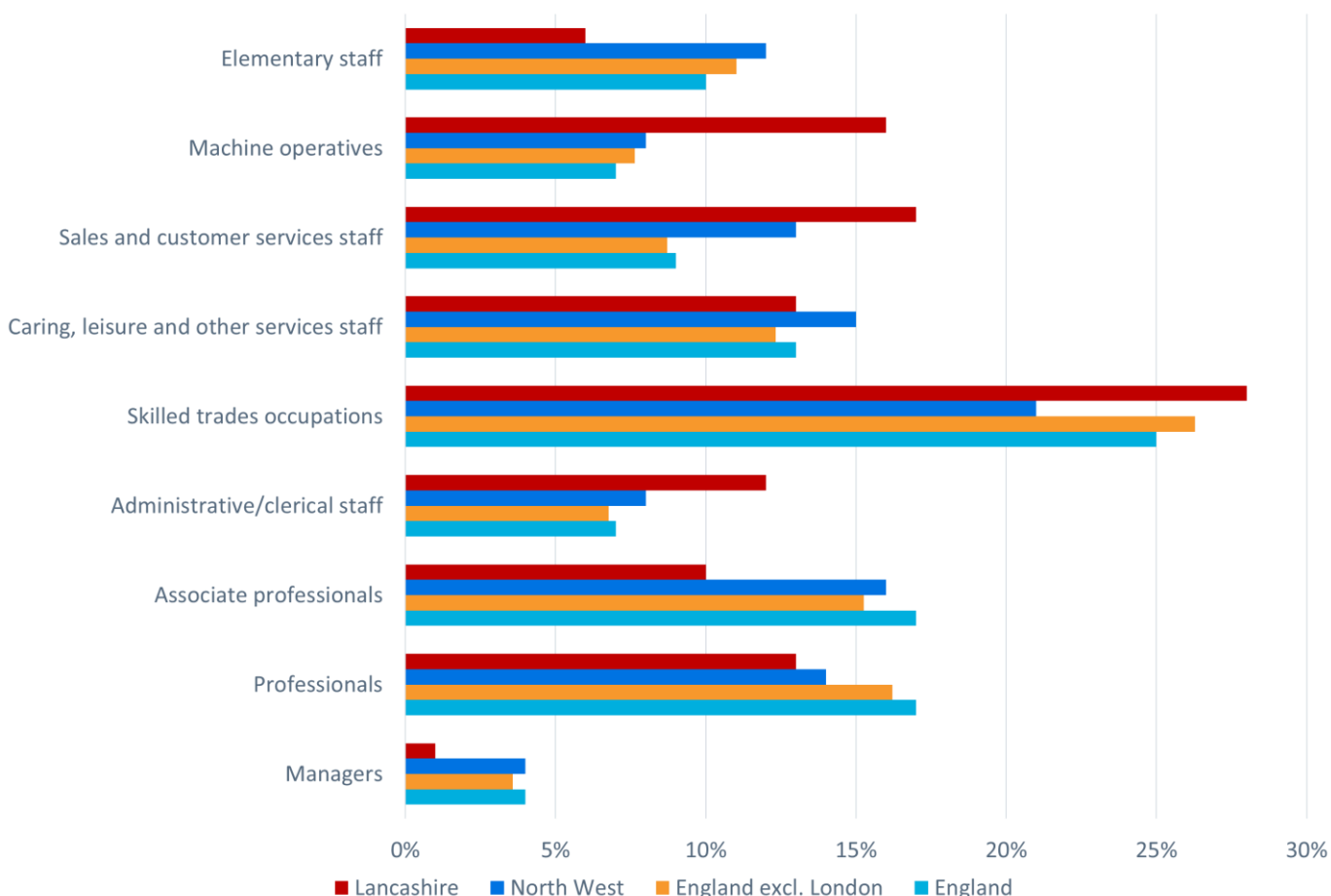


Source: Lancashire Labour Market Intelligence Toolkit, 2018

Skills shortages

- In terms of the current level of supply and demand for skills, Lancashire suffers fewer shortages in elementary staff, associate professionals, and manager when compared to the North West and England.
- On the other hand, Lancashire has greater levels of skills shortages in Machine operatives, sales and customer services staff and skilled trades occupations than the North West or England.
- This pattern - which is mirrored by data on hard-to-fill vacancies - indicates that the majority of current skills shortages in Lancashire are focused on mid-level skills.
- However, this pattern may change in future, as sectoral and occupational change occurs due to shifting technological drivers.

Employers reporting skills shortage vacancies by Occupation



Source: UKCES, 2015

Employment change by sector and occupation 2018-2028

- Between 2018-2028 the UK is projected to experience shifts in employment by sector. Lancashire is projected to experience similar changes to the UK.
- Key anticipated employment growth sectors in Lancashire are:
 - Construction;
 - Professional, scientific and technical;
 - Administration and support;
 - Health and social work; and
 - Arts, entertainment and recreation.
- Sectors projected to shrink in terms of employment include:
 - Agriculture;
 - Mining and quarrying;
 - Manufacturing;
 - Energy;
 - Water and waste; and
 - Public administration and defence.
- These sectoral shifts are projected to link to changes in Lancashire's occupational mix, with falls in demand for Process, plant and machine operatives (linked to a projected decline in manufacturing employment associated with digitisation and automation), and a decline in demand for Administrative and secretarial occupations (linked to digitisation and automation).

Sector change 2018-2028

	Lancashire	UK
Agric', forestry & fishing	-10%	-9%
Mining & quarrying	-32%	-28%
Manufacturing	-13%	-12%
Energy supply	-15%	-14%
Water & waste activities	-10%	-9%
Construction	11%	11%
Wholesale & retail	5%	5%
Transportation & storage	0%	2%
Accommodation & food	4%	6%
Info & comms	8%	10%
Financial services	-3%	-2%
Real estate	6%	10%
Prof, sci & tech	13%	14%
Admin & support	14%	15%
Public admin & defence	-8%	-5%
Education	-1%	2%
Health & social work	3%	6%
Arts, entertainment & recreation	7%	9%
Other service activities	8%	8%

Occupation change 2018-28



Source: Lancashire Labour Market Intelligence Toolkit, 2018

WORKING DRAFT: Lancashire Local Industrial Strategy: Evidence Base

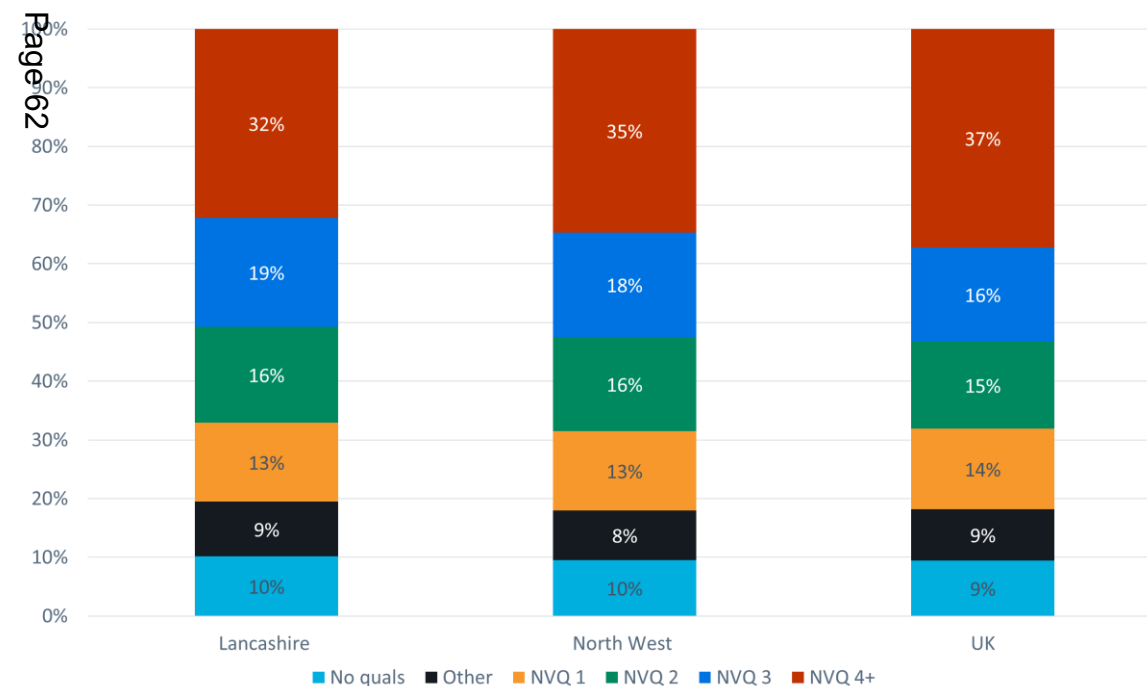
■ Lancashire ■ UK

47 | May 2019

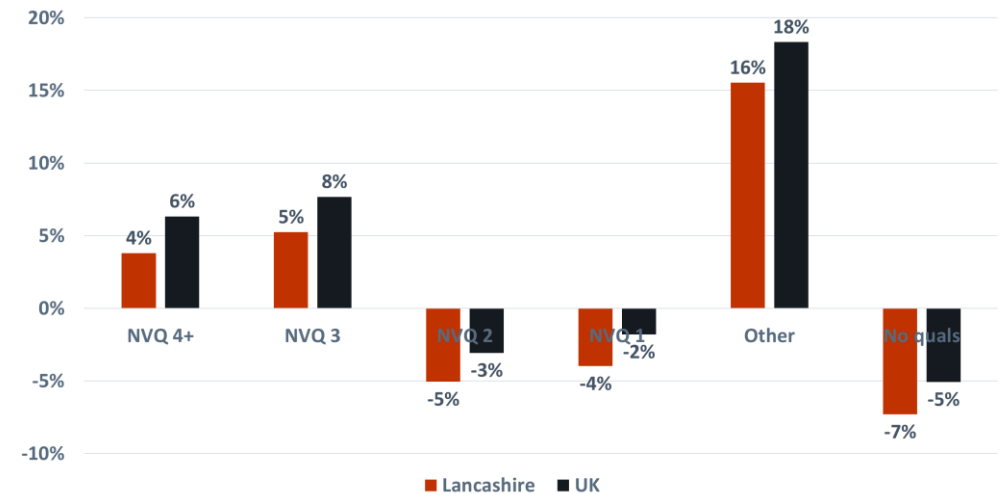
Skill levels – present supply and future demand

- Lancashire currently has a lower proportion of residents with NVQ Level 4+ qualifications than the North West and UK and a higher proportion of those with Level 3.
- Projections of demand for qualifications to 2028 show increased demand for NVQ Level 3 and 4+ with declines in demand for Levels 1 and 2, and a significant fall in demand for those with no qualifications – Lancashire is projected to experience a larger decline in the demand for those with no qualifications than the UK overall.
- Thus, there is a challenge for the local economy to upskill its existing workforce and to ensure that the next generation of workers has the qualifications necessary for the skill-hungry economy of the future.

Existing qualification Levels



Projected demand for qualification levels 2018-2028

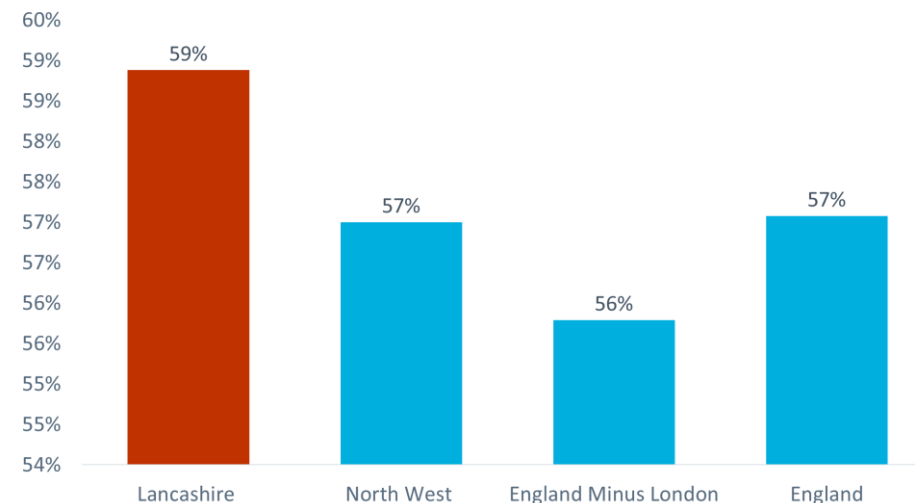


Source: Lancashire Labour Market Intelligence Toolkit, 2018; & Census, 2011

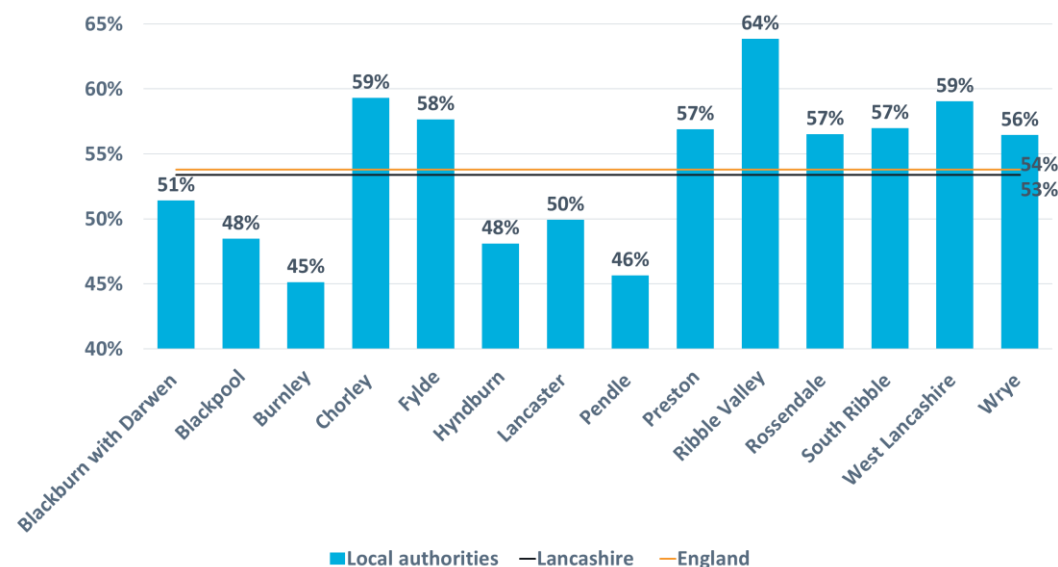
Educational attainment

- Schools, colleges and universities in Lancashire drive the future talent pipeline.
- The picture of current educational performance across Lancashire varies depending on the metrics used.
- Looking at the proportion of residents attaining Level 3 qualifications by age 19, Lancashire outperforms the North West and England.
- Looking at the proportion of Key Stage 2 pupils reaching expected their expected level in reading, writing and mathematics the Lancashire average is on a par with that of England.
- However, there is significant variation in Key Stage 2 attainment at the local authority level with some local authorities (i.e. Blackpool, Burnley, Hyndburn and Pendle) significantly underperforming by this metric.
- The Lancaster average of key stage two attainment is weighted upwards by the strong performance of some of its other local authorities.

% of attainment of Level 3 by age 19



% of pupils at key stage 2 reaching expected level in Reading, Writing & Mathematics

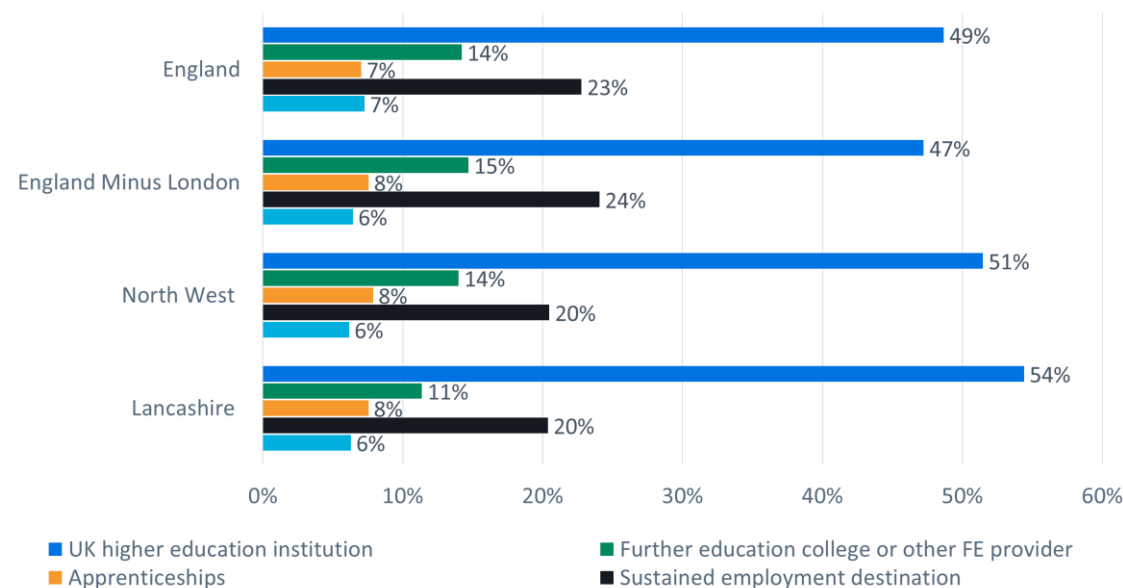


Source: Lancashire Labour Market Intelligence Toolkit, 2018

School leavers destinations

- In Lancashire, a higher proportion of students go into higher education than in the North West or England as a whole – however, there is significant variation between Local Authority Districts.
- However, a smaller percentage of Lancashire's students move into Further Education than in the North West and England.
- While the percentage of students moving into apprenticeships matches the regional average and is marginally higher than that of England.
- Further Education provision in Lancashire, is mainly rated Outstanding or Good. But there is room for improvement. Stakeholder consultations indicated concern that current funding levels to FE colleges were inadequate to meet expected needs.
- The relative fit of the future talent flow with the local economy's needs depends on the subject choices of students – the next two slides summarise subject choices in Further Education and Higher Education.

Destination of students after completing Key Stage 5 by %



Source: DfE, 2017

Ofsted Ratings for Schools/Colleges (16-18 years)

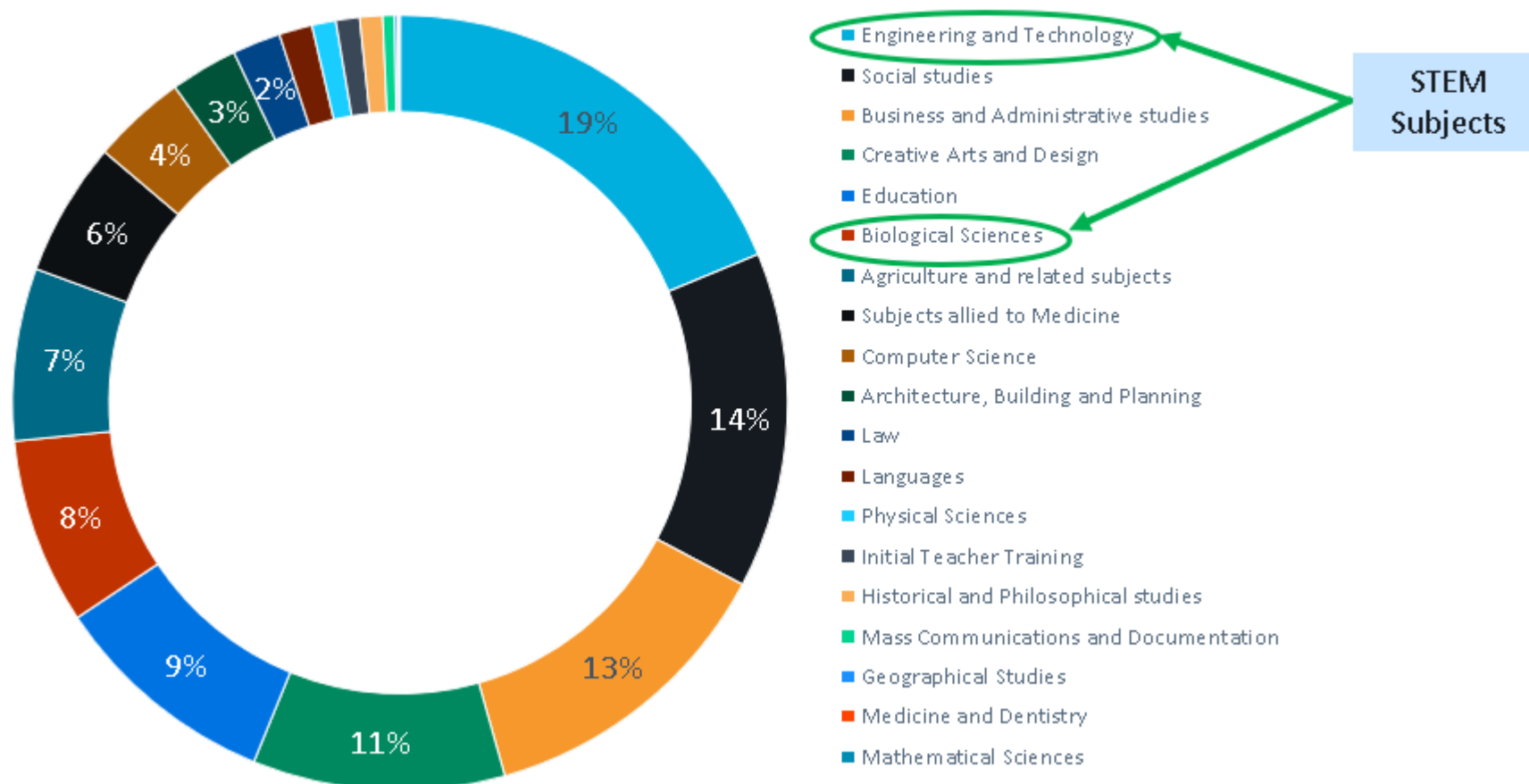
Ofsted Rating	Number of FEI
Outstanding	17
Good	18
Requires Improvement	7
Inadequate	1
No data available	38

Source: DfE, Find and compare schools in England, March 2019

Further Education subject of study

- The figure below presents the breakdown of subjects studied by Lancashire's residents at the further education level – Engineering and Technology is the biggest single subject perhaps reflecting the demand for skills from the county's large manufacturing sector. Biological Sciences is the next largest STEM subject.

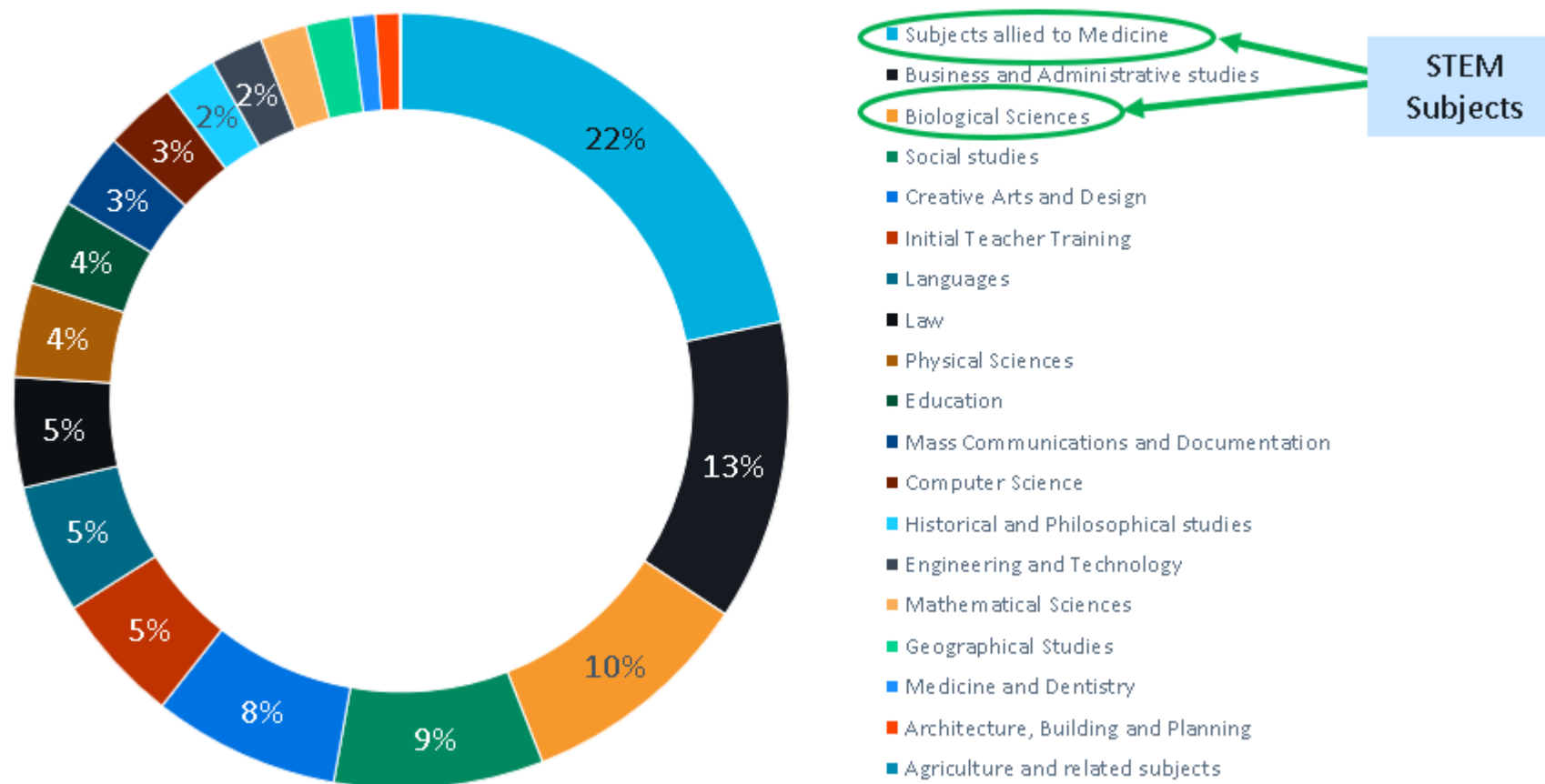
% of Further Education students by subject



Higher education subject of study

- The figure below presents the breakdown of subjects studied by Lancashire's residents at the higher education level.
- A large proportion of students chose to study STEM subjects – particularly related to Medicine and Biological Sciences.

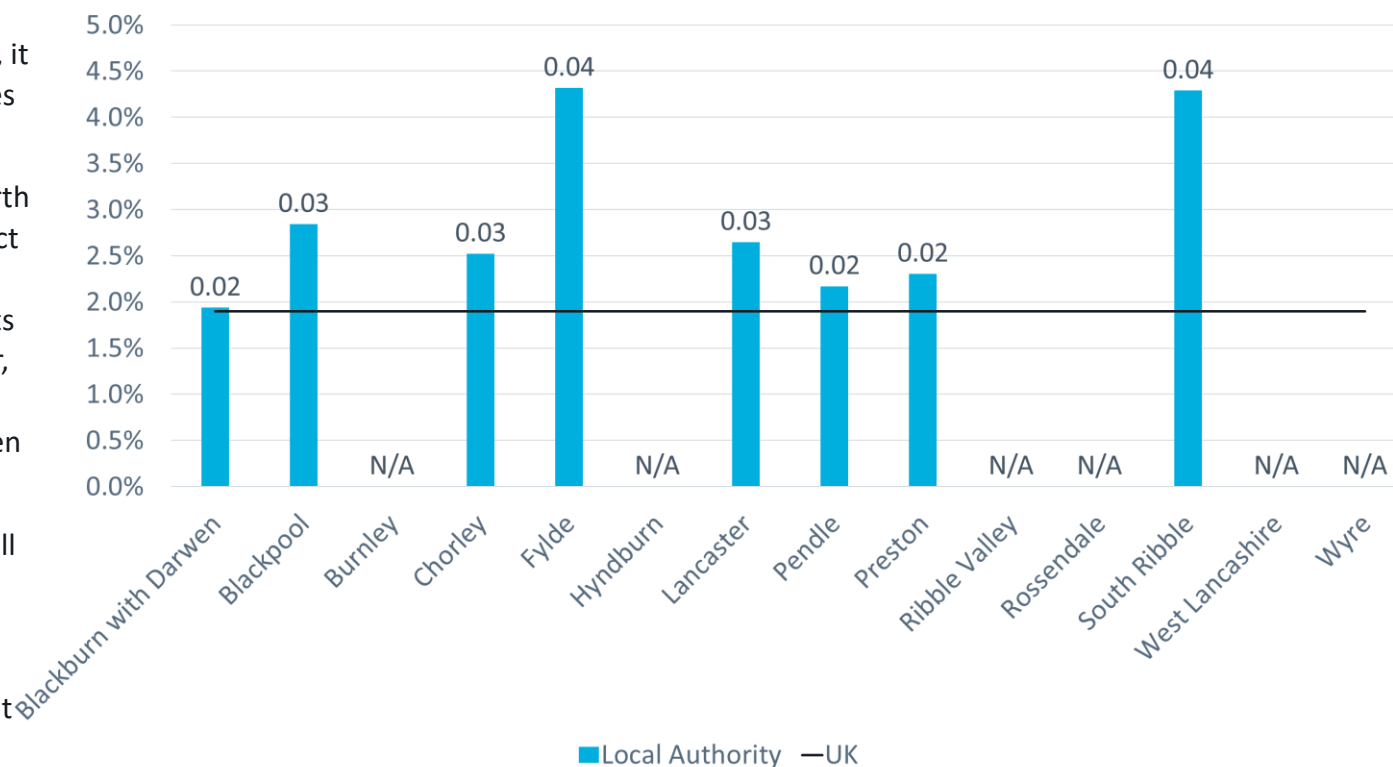
% of Higher Education students by subject



Health

- Health has a significant impact on worker productivity and well-being. For this reason, it is important to understand the health outcomes of residents.
- With regard to healthy life expectancy at birth (i.e. the number of years a person can expect to live in good health), Lancashire underperforms in terms of its male residents compared to the national average. However, Lancashire's female residents have a longer average healthy life expectancy at birth when compared to England and the North West.
- In terms of sickness absence rates, almost all of Lancashire's local authorities appear to perform worse than the UK average. Although, it should be noted that the data provide only a partial picture – they do point to a potential drag on worker productivity.

Sickness Absence Rates



Source: ONS Sickness Absence Rate by Local Authority, 2016

Healthy life expectancy at birth

	Male	Female
England	63yrs	64yrs
North West region	61yrs	62yrs
Lancashire	61yrs	65yrs

Source: Public Health England, 2015-17

Infrastructure



Introduction

Outline of this section

- This draws on national and local data to outline headline evidence in relation to:
- Key transport infrastructure;
- Transport modes for travelling to work;
- Digital connectivity;
- Energy;
- Housing; and
- Land and premises – for which evidence is being collected.

Key messages

- Lancashire is reliant on the road and car travel.
- There are good north-south road links but poor east-west road connectivity.
- Transport infrastructure is concentrated in the south of the county.
- Lancashire has two sea ports, which provide international connectivity, Heysham and Fleetwood, as well as relatively easy access to Manchester airport.
- Digital connectivity appears to be reasonably good compared with national averages, but the lack of fibre optic network is set to limit economic growth under a BAU scenario.
- The county plays a significant role in the country's energy infrastructure with nuclear and offshore wind production. It also has shale gas potential.
- However, lack of access to the gas grid exacerbates fuel poverty in some areas.
- Housing prices are relatively affordable compared to other parts of the country – but there are wide variations within the county.
- Delivery of new housing varies across the county with Chorley exceeding targets.

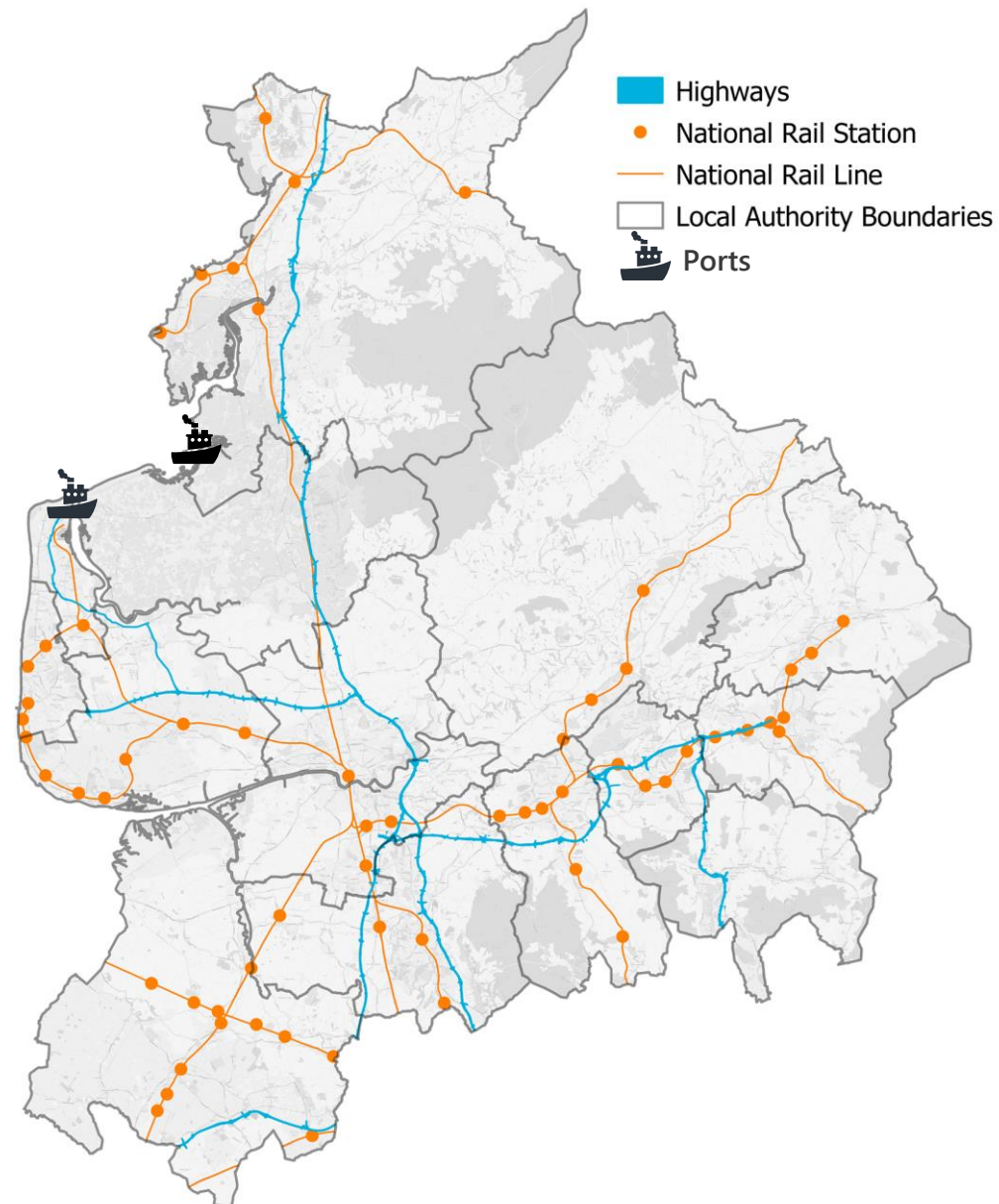
Key transport links

- The distribution of transport infrastructure is uneven across the county with little to no major highways or national rail stations in the northwestern part of the county with the majority of infrastructure concentrated in the south of the county.
- Travel within the county is dominated by road and car.
- The country's road network is characterised by good north-south links and poor east-west links.
- Five of Lancaster's stations see over 1 million passenger entries and exits per year:

Station	Entries and exits 17/18
Preston	4,858,536
Lancaster	2,142,868
Ormskirk	2,006,936
Blackpool North	1,577,596
Blackburn	1,258,190

Source: Office of Rail and Road, 2018

- In addition to its land transport links, Lancashire has two international gateways with ports Heysham and Fleetwood.

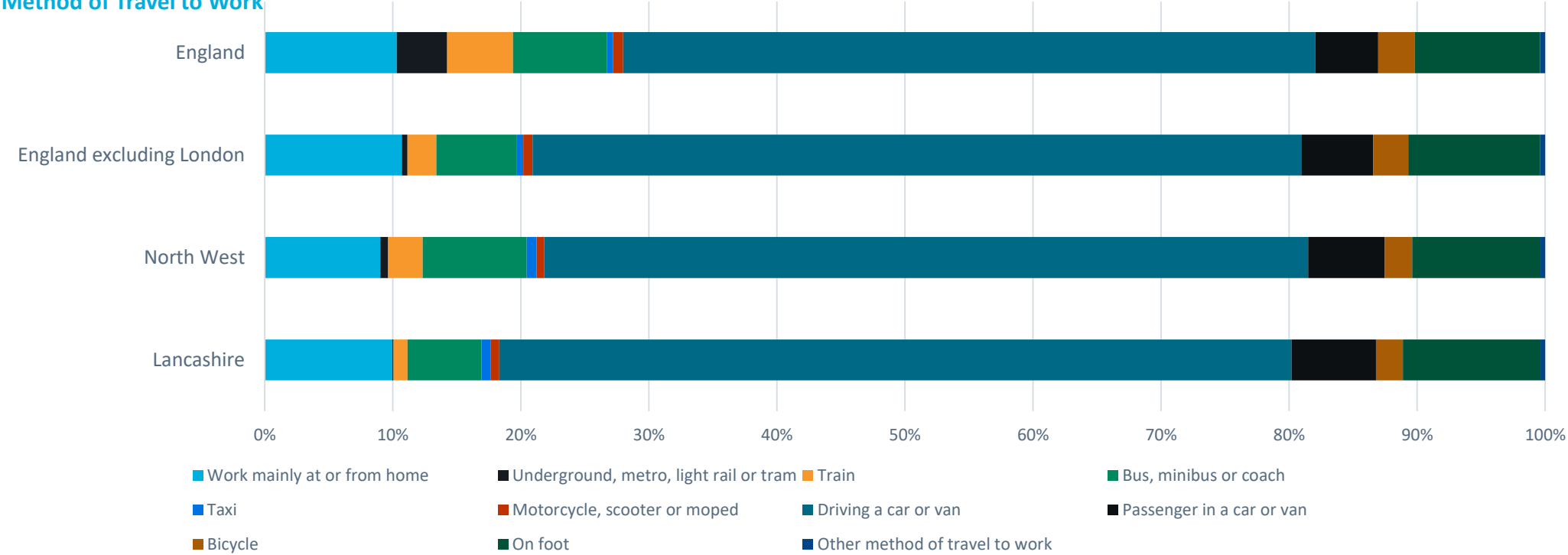


Source: Highways England, National Rail, 2018.

The importance of transport links – Transport modes

- In Lancashire, a relatively low proportion of people travel to work by public transport and accordingly a relatively high proportion travel to work by car.
- Across Lancashire, 7% of residents travel to work by public transport, compared to 11% in the North West, 9% across England excluding London and 16% across England as a whole.

Method of Travel to Work

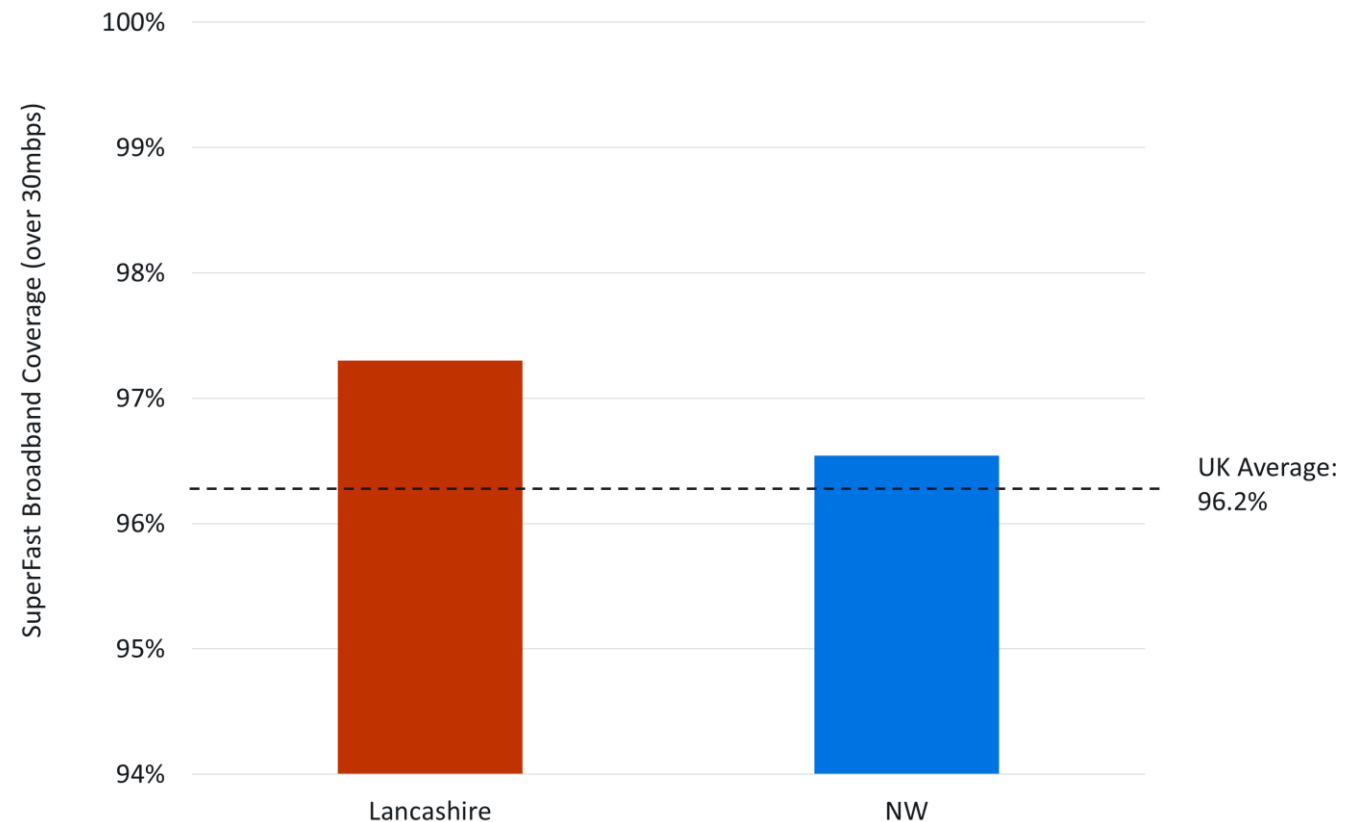


Source: Census, 2011

Digital connectivity across Lancashire

- Lancashire performs well in terms of its digital infrastructure with over 97% of its area benefiting from SuperFast broadband coverage compared to just over 96% across both the North West and UK as a whole.
- However, Lancashire is poorly served by fibre-optic networks, which could hold back the development of the digital economy and adoption of Industry 4.0.

Superfast Broadband Coverage

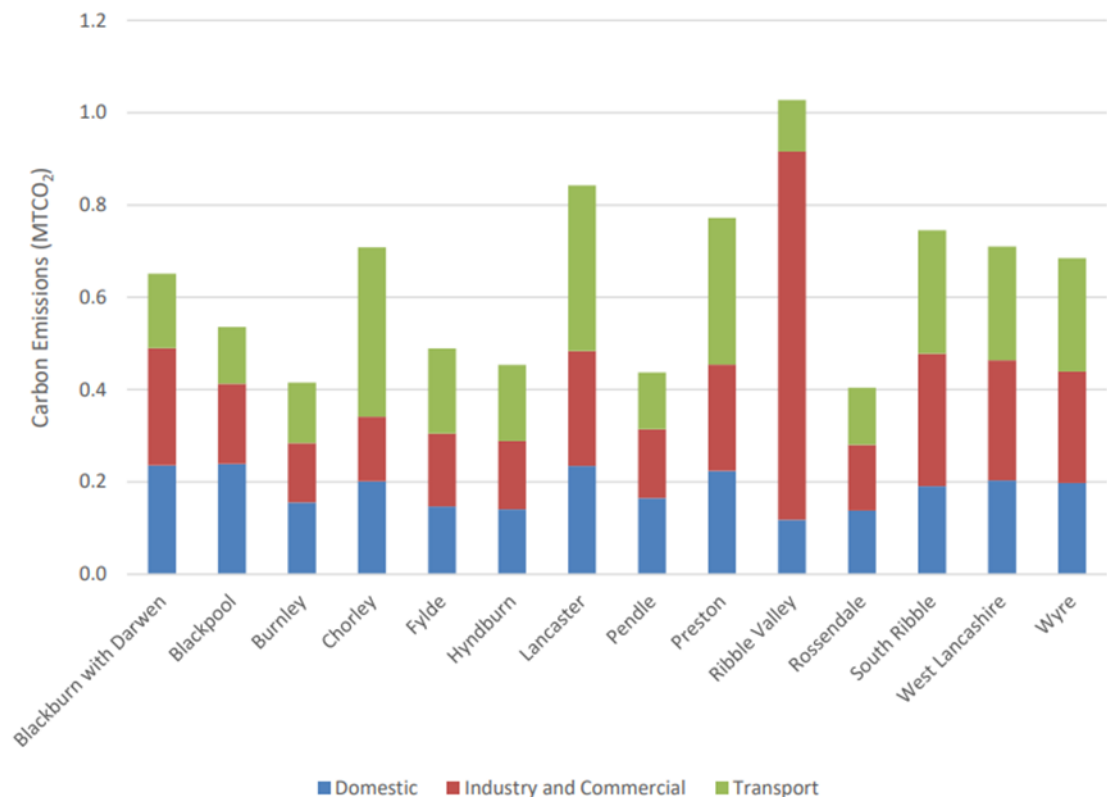


Source: Think Broadband Local Broadband Information, 2019

Energy

- The Lancashire Energy Plan evidence base review found that:
- *“Generally, connections to both the gas and electricity network are not currently providing a barrier to development with good access to both infrastructures. However, specific key development sites can lack the infrastructure to be developed quickly.”*
- It also found that Lancashire has:
- Significant potential for wind power (both on and offshore) however planning barriers may prove a constraint;
- An established nuclear industry and supply chain in which key businesses continue to find new market expansion opportunities; and
- A high-value services sector that supports the small-scale renewable energy industry, which could providing continued growth opportunities.
- Fuel poverty issues exacerbated by lack of access to the gas grid in some areas. Lancashire has Fuel poverty rate of 12.2% compared to 11.8% and 11% across the North West and England respectively.

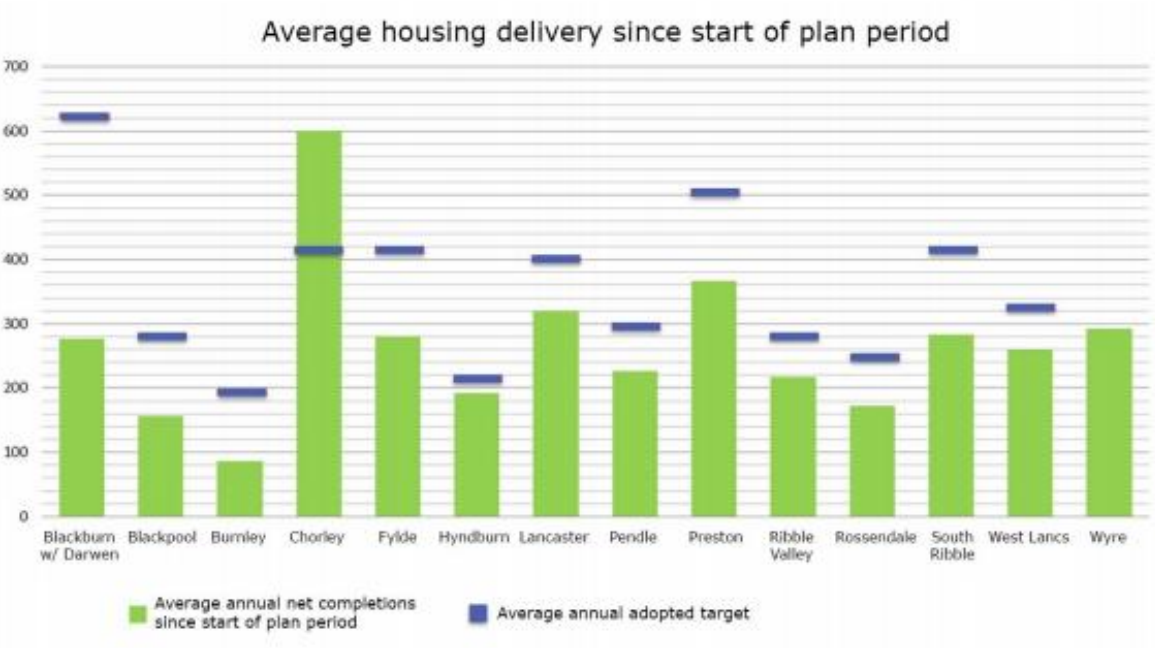
Carbon Emissions by Local Authority District



Source: Lancashire Energy Plan Review

Housing delivery

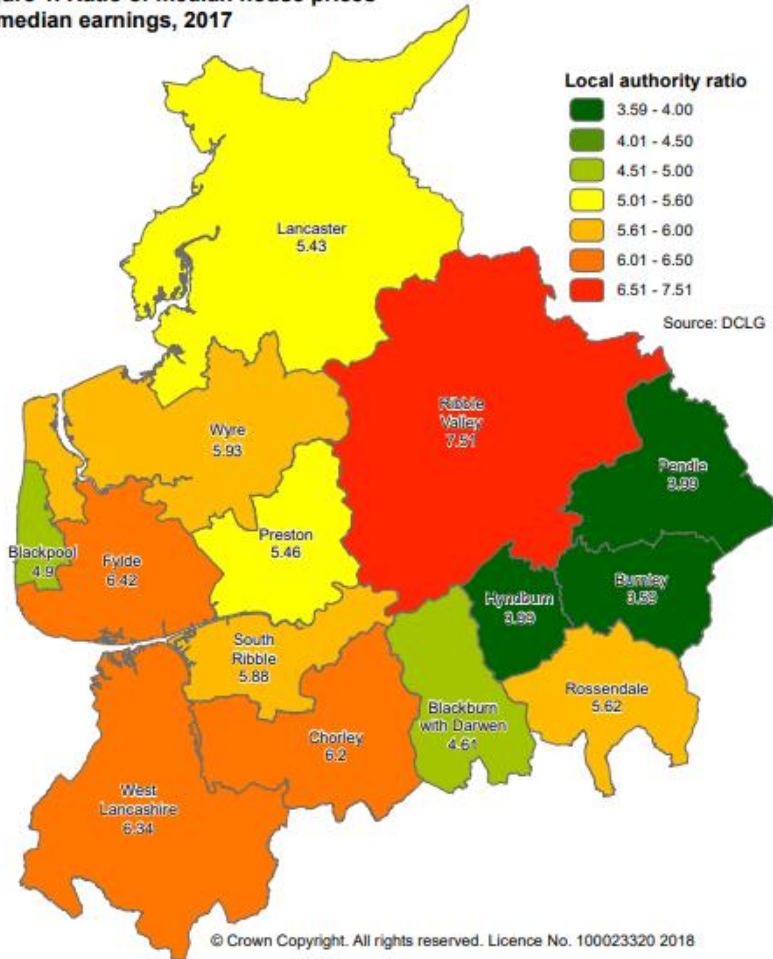
- Lancashire is relatively affordable housing costs, compared to other parts of the country. But housing affordability varies across the county.
- Lancashire is delivering new housing, with Chorley exceeding local plan targets, but most areas have some way to go to achieve their housing delivery targets.



Source: LUC, 2019 & Lancashire County Council, 2018

Housing affordability

Figure 1. Ratio of median house prices to median earnings, 2017



Sites and premises

NB: Further evidence is required.

Source: Census, 2011

Place



Introduction

Outline of this section

- This section looks at the spatial and human geography of Lancashire. It draws on national datasets and local evidence to outline headline issues related to:
- Employment location;
- Travel to Work patterns;
- Variations in employment, earnings and income by Local Authority District;
- Deprivation;
- Housing;
- Quality of Life;
- Visitor economy; and
- Agriculture.

Key messages

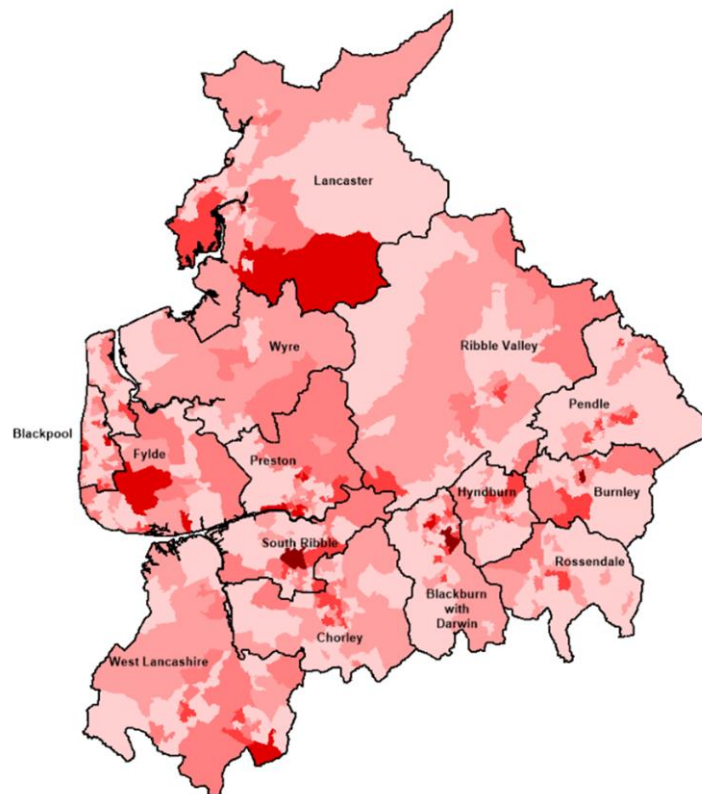
- Lancashire has employment hotspots which are associated with transport provision.
- It has a relatively self-contained labour market – it ‘imports’ 14% of its workforce and exports 12% of its workers to other areas.
- Key sources of workers are: Wigan, Bolton and Sefton, while key destinations for Lancashire residents are these areas plus Manchester.
- There is significant travel to work between local authority areas with sub-regions.
- There are stark variations in rates of benefit claimants and job seekers between Local Authority Districts. These variations are also reflected in weekly pay and disposable income, and maps of deprivation.
- The county has relatively affordable housing, good access to green space, limited issues of air and light pollution.
- While the county is home to nine arts bodies which receive long-term funding from Arts Council England, the cultural offer is limited – and is seen as a limiting factor in attracting and retaining talent and investment.
- The visitor economy and agriculture are key sectors which rely on the physical attributes of the county as a place.
- There are long-term historical strengths on which to build the visitor economy – but major challenges for coastal and seaside towns.
- The agricultural, forestry and fishing industries are intimately linked to place – they form an essential part of the management of the place, with over 200, 000 hectares of farmland.

Travel to work –destinations

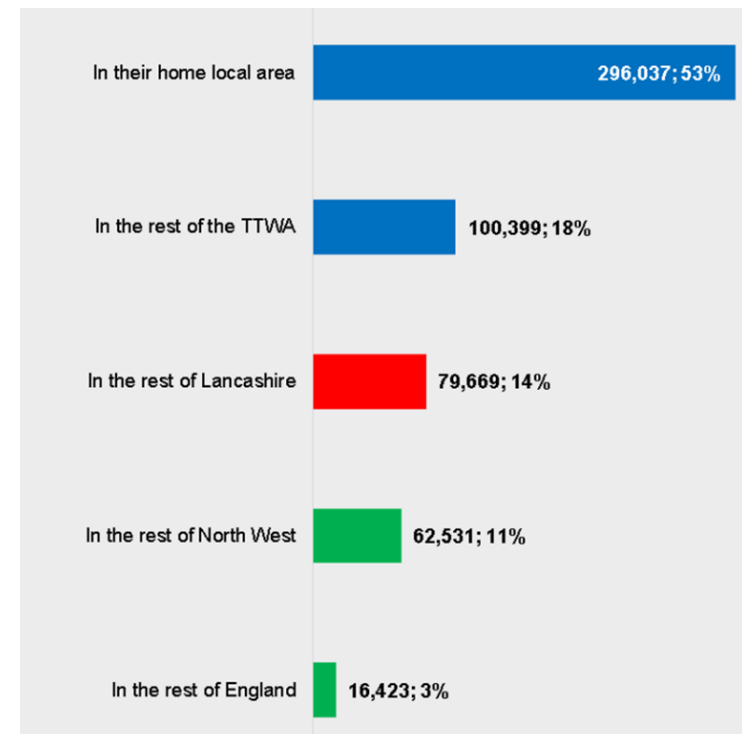
- Given its size, Lancashire has a relatively low level of out-commuting.
- The majority of Lancashire's residents live and work in Lancashire with the areas of highest employment also distributed across the county.

Employment hotspots

(Darker red indicates higher number of jobs)



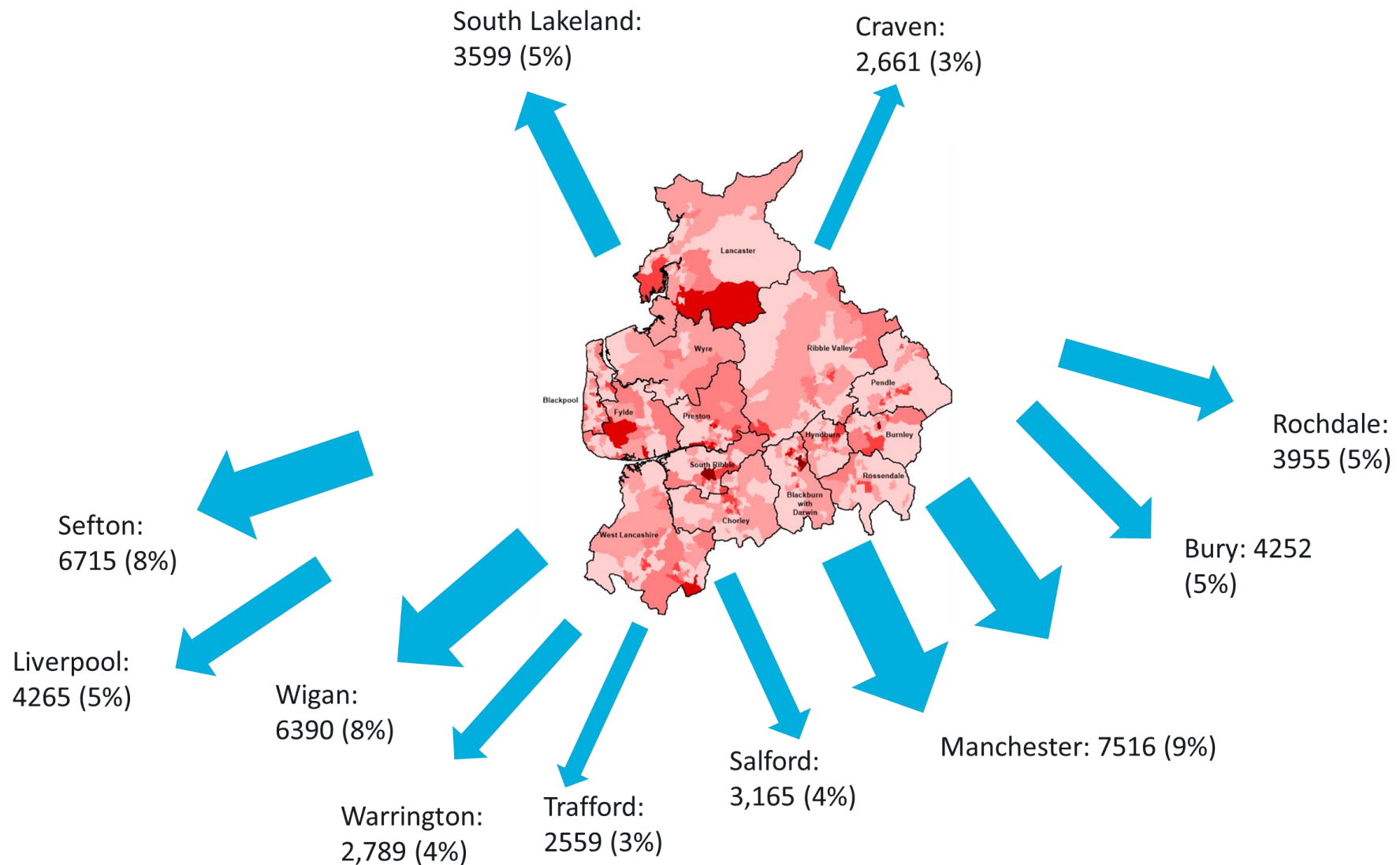
Where to residents work?



Source: Lancashire LEP, The Lancashire Labour Market Intelligence Report, 2018

Travel to work – Worker outflows

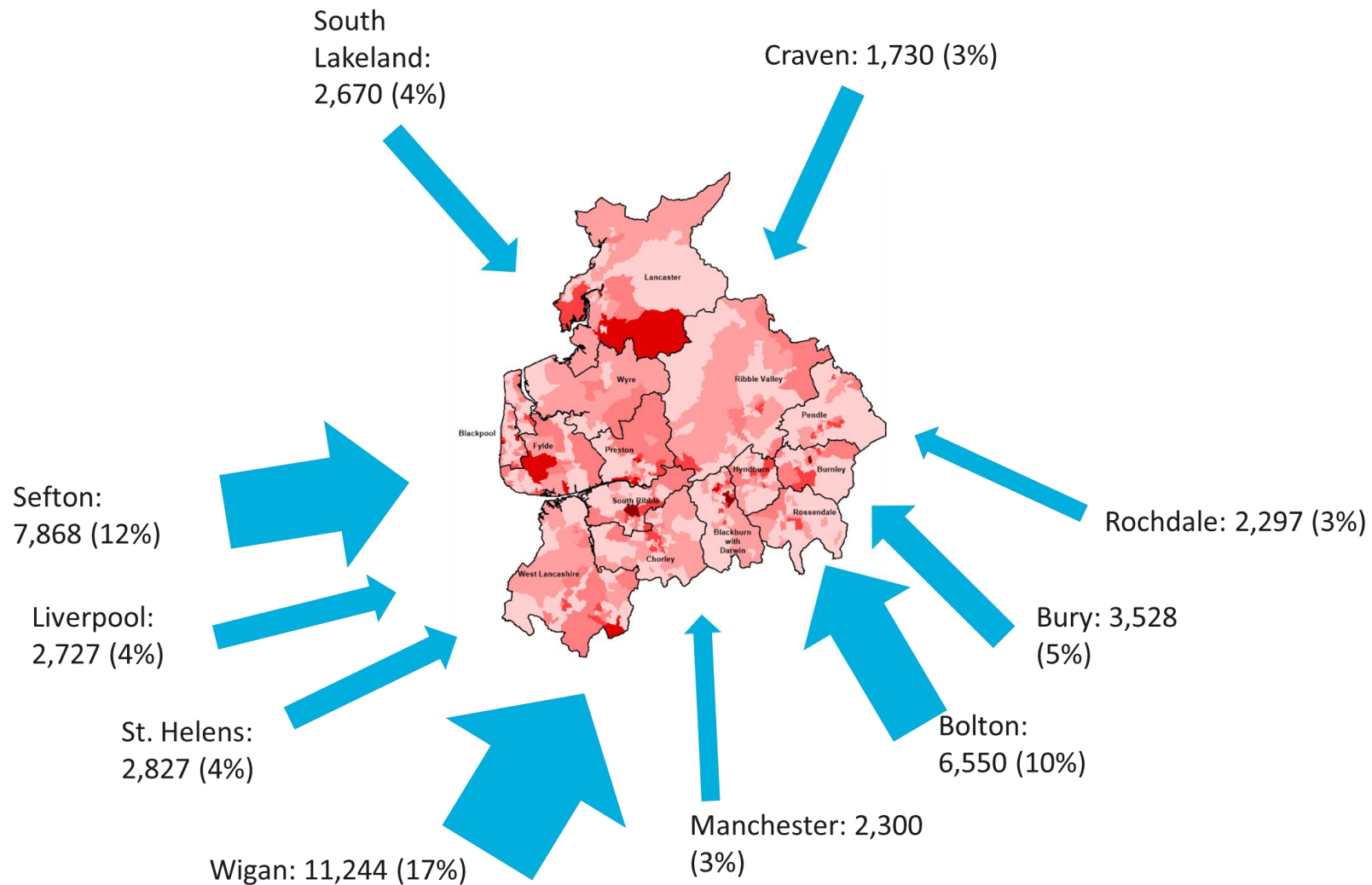
- Of the 79,462 residents who commute to work outside of Lancashire they are dispersed across the following areas:



Source: Census, 2011

Travel to work – Worker inflows

- Of the 66,500 people who work outside of Lancashire but live outside of the county the largest proportion of workers live in Sefton or Wigan.



Source: Census, 2011

Travel to Work – Intra-county flows

Place of Residence

	Blackburn with Darwen	Blackpool	Burnley	Chorley	Fylde	Hyndburn	Lancaster	Pendle	Preston	Ribble Valley	Rossendale	South Ribble	West Lancashire	Wyre
Blackburn with Darwen	31,801	193	2,103	1,328	218	6,278	242	1,249	942	3,126	1,155	1,276	161	230
Blackpool	222	32,638	38	308	5,167	81	500	29	1,096	206	25	552	98	10,119
Burnley	1,331	24	17,395	190	32	2,149	47	5,159	172	1,173	1,588	222	53	47
Chorley	739	176	103	17,280	235	275	173	101	1,374	249	103	4,071	942	226
Fylde	367	7,312	57	818	15,100	123	536	73	3,320	358	58	2,112	282	3,353
Hyndburn	3,351	60	2,151	338	72	13,194	68	1,226	307	1,433	1,330	381	56	90
Lancaster	131	354	38	213	343	65	39,800	31	542	261	15	250	51	1,452
Pendle	636	35	4,692	113	19	851	29	18,170	96	645	701	114	37	30
Preston	2,315	1,897	468	4,770	2,904	726	1,657	386	34,082	2,155	256	13,492	1,298	2,404
Ribble Valley	1,942	256	1,187	637	412	1,923	275	1,108	1,891	9,896	224	1,298	127	451
Rossendale	648	9	825	116	19	1,337	17	399	57	208	10,863	68	13	17
South Ribble	1,278	504	278	6,537	611	472	457	197	5,186	564	145	17,478	1,177	534
West Lancashire	110	68	25	1,077	42	36	74	25	353	43	34	849	20,637	64
Wyre	139	4,902	32	274	1,310	59	1,040	19	1,299	308	16	404	62	17,703

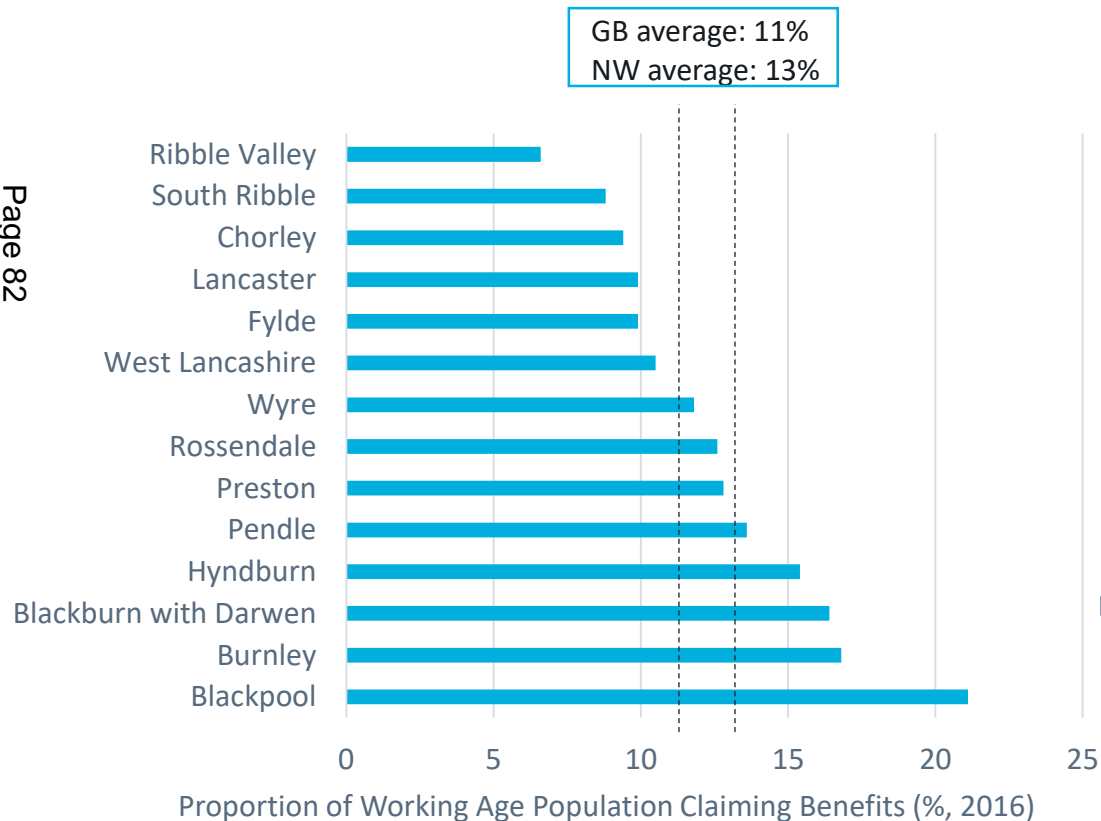
- The table above outlines travel to work flows between Lancashire's districts.
- Highlighted in yellow are places where more than 1,000 people move between local authorities for work.

Source: Census, 2011

Unemployment rates

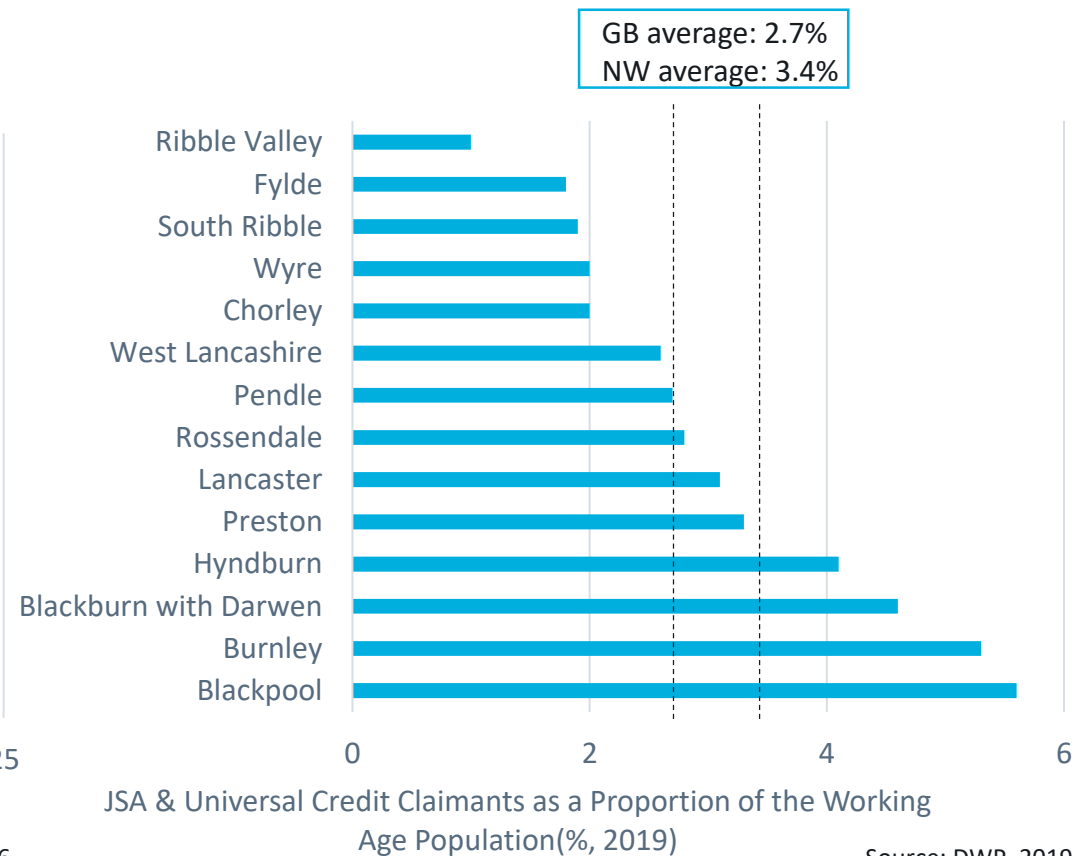
- There is significant variation in unemployment rates between Local Authority Districts in Lancashire – seven achieve rates below the national average, while seven exceed the national average.
- There is also significant variation between districts in the proportion of the population claiming benefits, with Blackpool, Burnley, Blackburn with Darwen, Hyndburn, Pendle, Preston, Rossendale, and Wyre above the national average.

Benefit claimants, 2019



Source: DWP, 2016

Jobseekers, 2019



Source: DWP, 2019

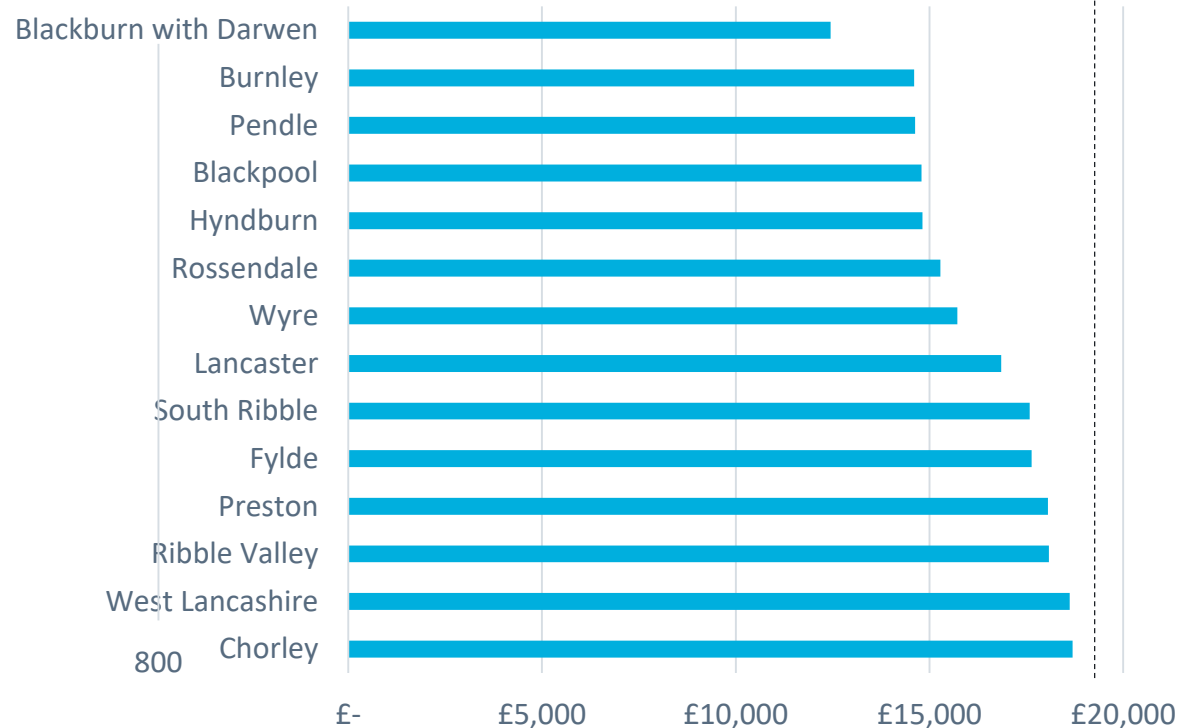
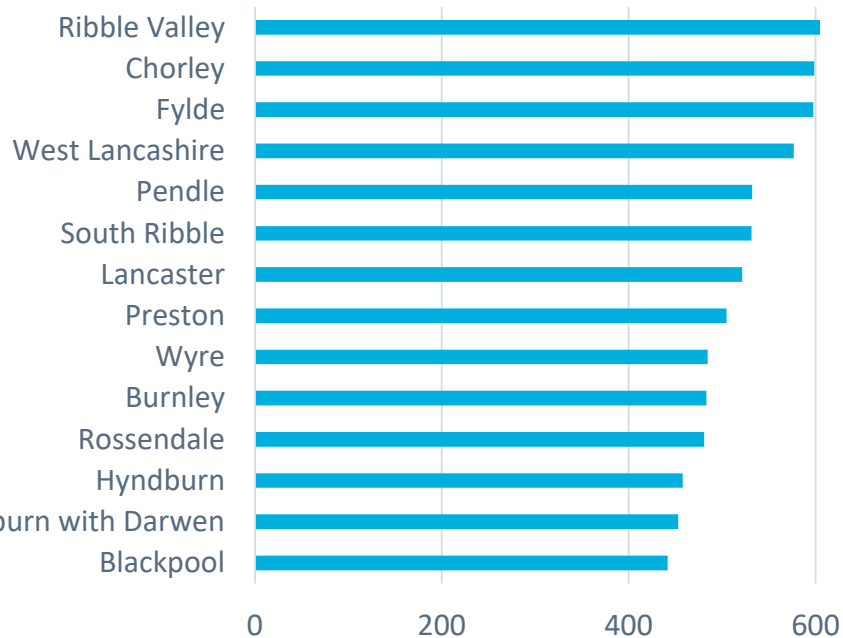
Gross Weekly Pay and Disposable Household Income (GDHI) per person

- Average Gross Weekly Pay in Lancashire lags the UK average of £541 by £61 a week, but Ribble Valley, Chorley, Fylde, and West Lancashire exceed this level, while Pendle, South Ribble, Lancaster, Preston, Wyre, Burnley, Rossendale, Hyndburn, Blackburn with Darwen and Blackpool are below the national average.
- IN terms of personal disposable income, all districts are below the UK average.

Average Gross Weekly Pay (£, 2018)

Gross annual disposable income

UK average: £19.4k



Source: Regional GDHI at current prices, 2016

Deprivation

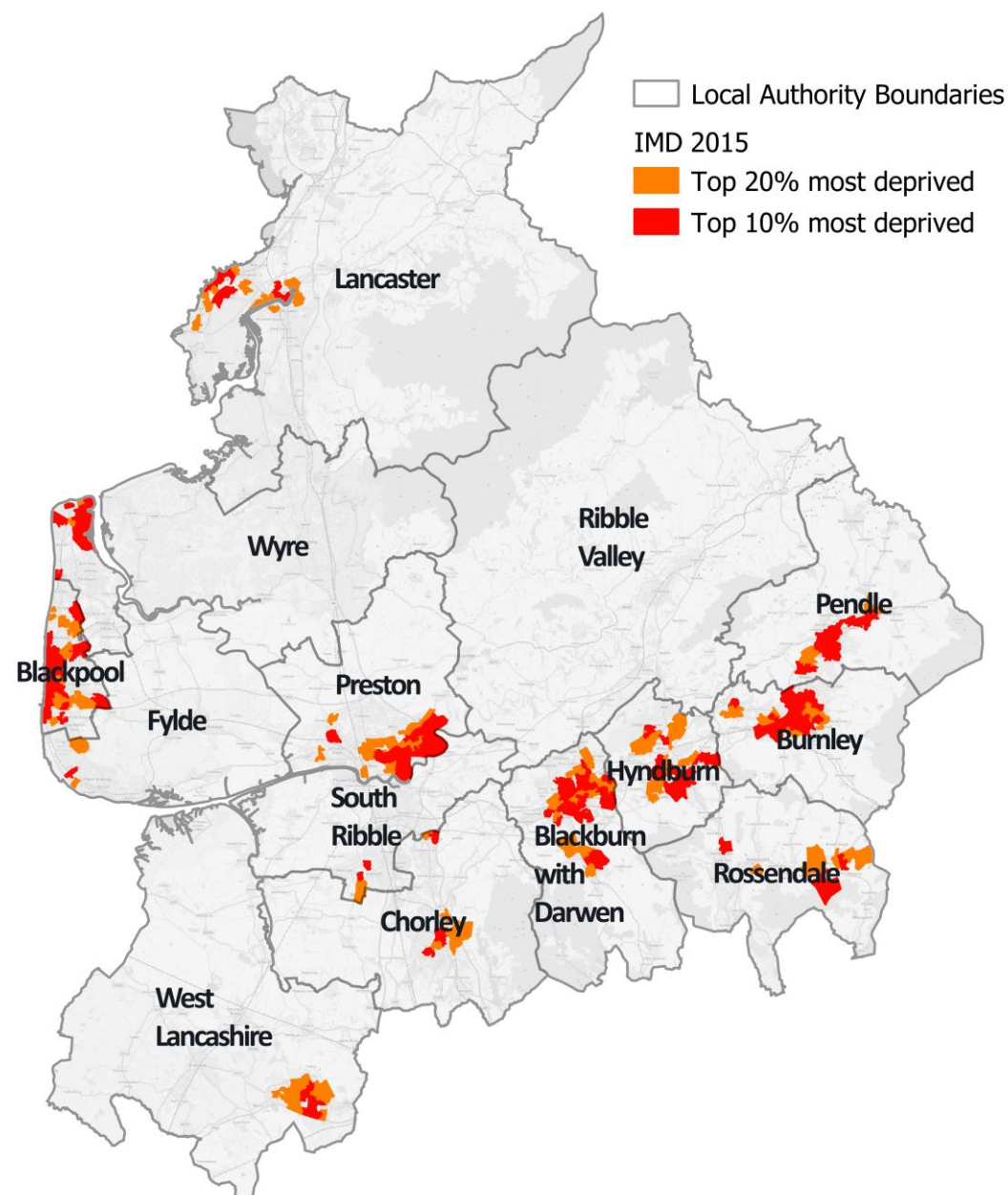
- Lancashire has a mixed pattern of deprivation across its local authorities with some areas of very high and very low deprivation.

Areas of low deprivation

- Ribble valley falls within the top 10% least deprived local authorities in the county.
- Chorley, Fylde and South Ribble fall within the top 50% least deprived local authorities in the country.
- Ribble Valley, Wyre and Fylde see none of the area within the top 20% most deprived.

Areas of high deprivation

- Blackpool, Burnley, Blackburn with Darwen and Hyndburn fall within the top 10% most deprived local authorities in the country.
- Pendle and Preston fall within the top 20% most deprived areas in the country.
- The pattern of deprivation across Lancashire can be seen on the map to the right. There are particular concentrations of deprivation across the Fylde coast and in a strip to the south of the county between Pendle and Blackburn with Darwen.



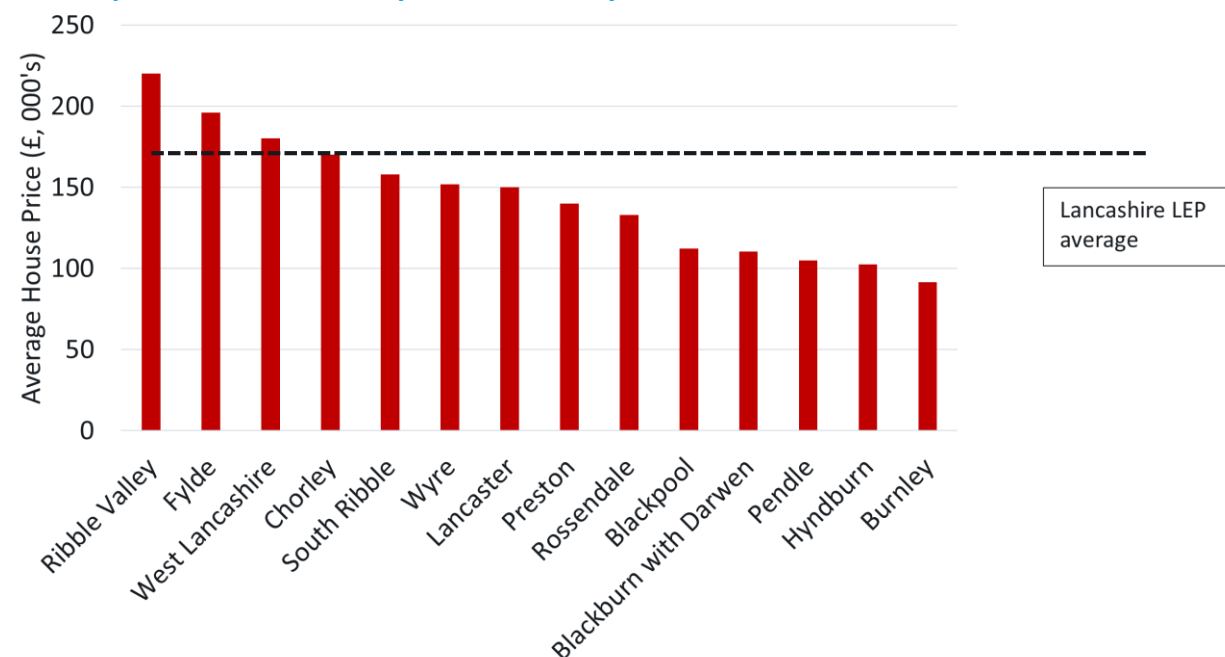
Source: Indices of Multiple Deprivation, MHCLG 2015

Housing affordability

Indicator	Lancashire LEP	North West	England	Source & Date
Average House Price	£143,000	£157,000	£235,000	ONS, House Price Statistics for Small Areas, 2017
Average Salary	£25,800	£26,660	£29,100	ASHE, 2017
Housing Affordability ratio	5.5	5.9	8.1	ASHE & ONS, 2018

- Compared to national and regional housing prices and salaries, Lancashire is relatively affordable.
- However, there is significant variation in house prices (and housing affordability) within the county.

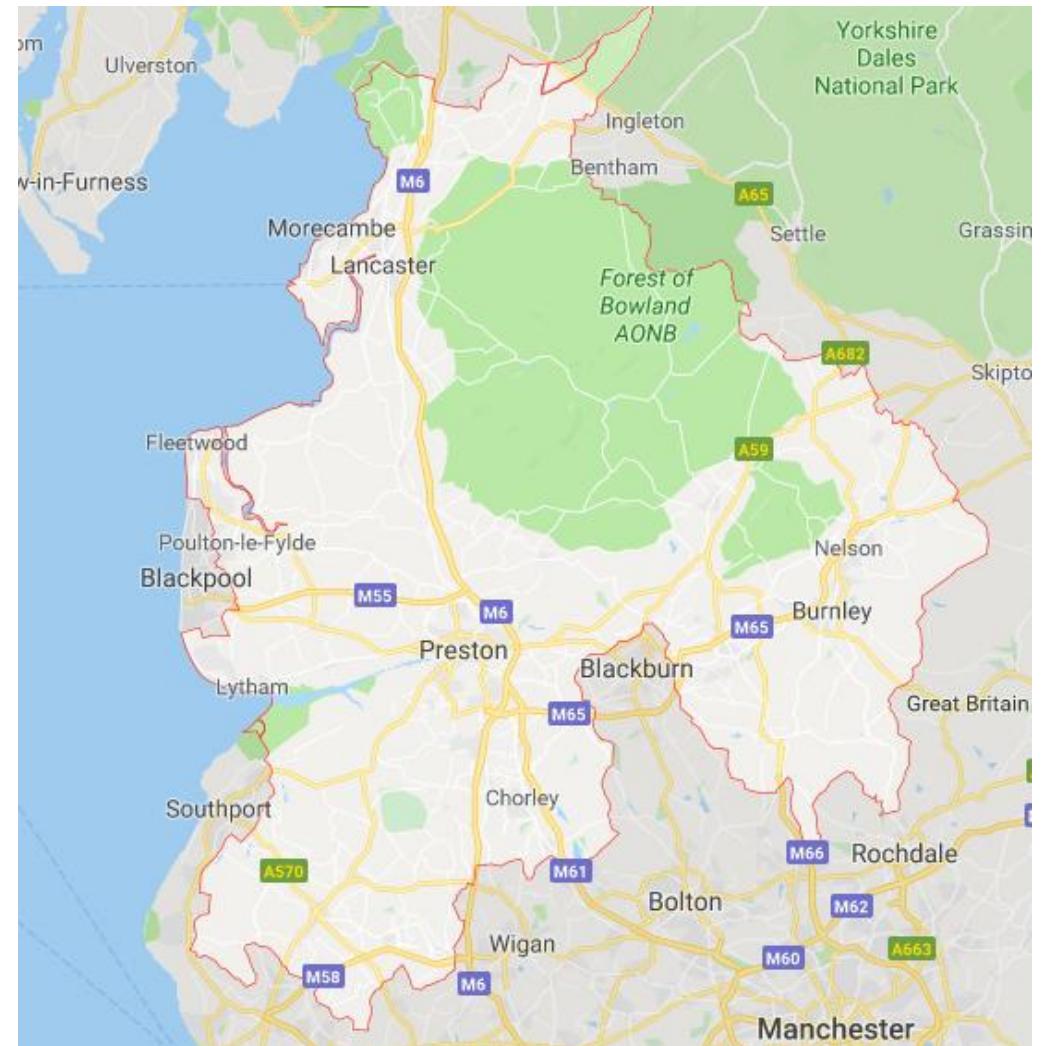
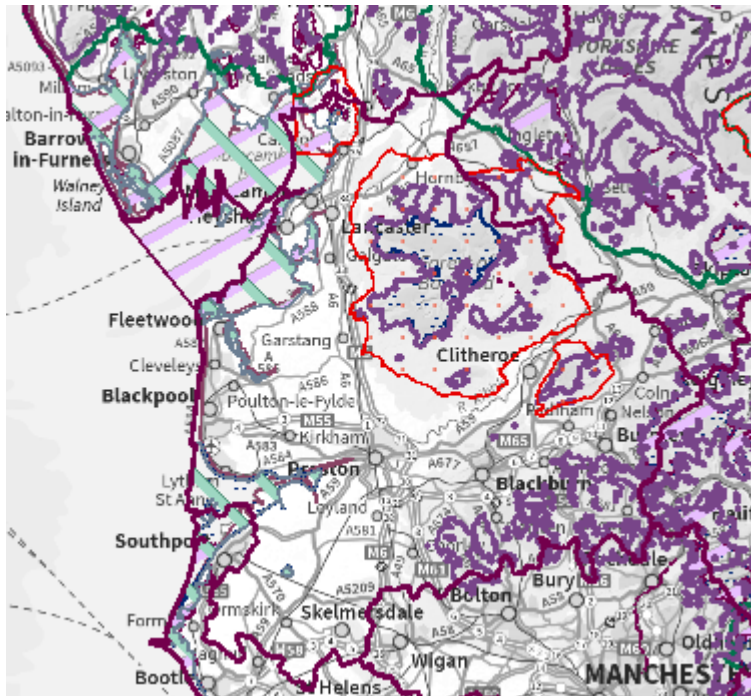
House prices in Lancashire by Local Authority District, 2017



Source: ONS, House Price Statistics for Small Areas, 2017

Quality of life - Natural capital

- Lancashire has significant natural capital. This includes:
- Protected landscapes – e.g. Forest of Bowland AONB (red boundary on map below and opposite);
- Significant areas of Moorland (purple boundary on map below); and
- RAMSAR sites – which are protected wetland areas (green lines on map below).



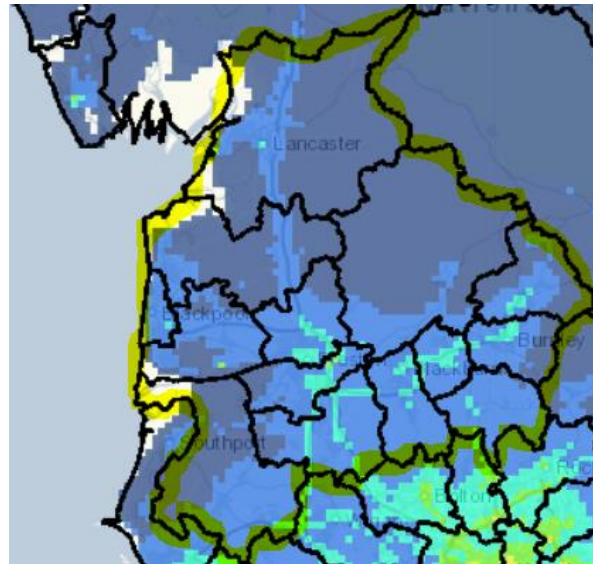
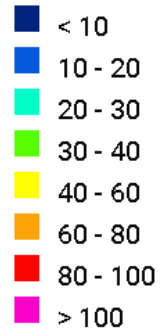
Source: Google Maps, 2019 & Natural England Interactive Map, Accessed 2019

Quality of life - Pollution levels

Air Quality

Nitrogen Oxides background concentration

Annual mean ($\mu\text{g m}^{-3}$ as NO_2)

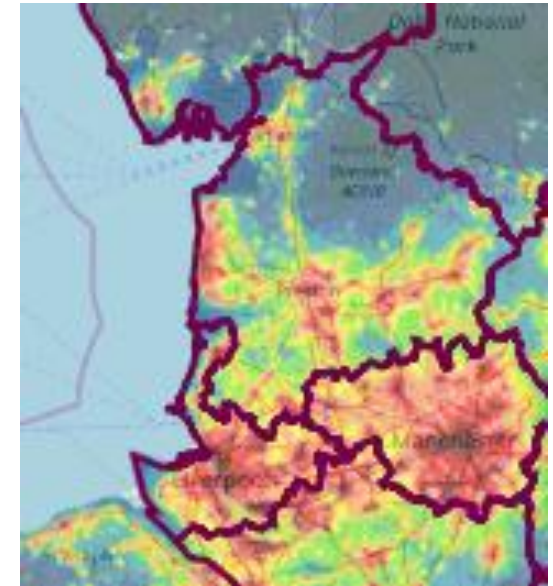
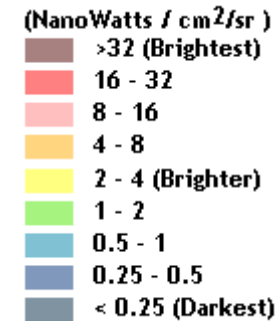


Source: UK Ambient Air Quality Interactive Map, Defra 2017

- The UK's Air Quality Strategy states that nitrogen oxides background concentrations should not exceed an annual average of $40 \mu\text{g m}^{-3}$.
- By this measure, Lancashire on the whole does not suffer from air quality issues, particularly in its rural areas.
- However, there are some small areas with high pollution – most notably Preston town centre, where Air Quality thresholds are being breached.

Light pollution

Night light levels



Source: Natural England, 2016

- Lancashire has a few areas of genuine dark skies concentrated around the Forest of Bowland AONB.
- The southern part of the county has the highest levels of night-time light pollution.

Quality of life – Creative and cultural activity

- There is a considerable amount of investment in creative and cultural activity across Lancashire, including from Arts Council England.
- There are nine National Portfolio Organisations, across a range of disciplines, receiving ongoing support from the Arts Council.
- In addition to professionally led cultural activities, funding through the public sector there is ongoing development of cultural activity across Lancashire's third and private sectors.
- However, stakeholders have highlighted the lack of a healthy night-time economy and a strong cultural offer as a barrier to attracting and retaining talent and investment.

Arts Council National Portfolio awards 2018-2022

Applicant Name	Local Authority	Discipline	TOTAL Portfolio grant 18/22 - £	
Burnley Youth Theatre	Burnley	Theatre	£	253,460
Curious Minds	Preston	n/a	£	5,341,292
In-Situ	Pendle	Visual arts	£	556,000
Lancaster Arts at Lancaster University	Lancaster	Combined arts	£	412,212
Littleworld Ltd t/a Horse and Bamboo Theatre	Rossendale	Theatre	£	494,528
Ludus Dance	Lancaster	Dance	£	382,576
More Music	Lancaster	Music	£	422,436
Preston City Council	Preston	Museums	£	900,000
The Dukes Playhouse Ltd	Lancaster	Theatre	£	1,024,760

Source: Arts Council, 2018

Visitor economy

Contribution to Lancashire's economy

- Lancashire's visitor economy draws 63 million visitors a year with a diverse offer including both natural heritage and culture assets.
- At present the sector contributes: 56,000 jobs and £3.7 bn GVA.
- This represents 7% of the county's GVA.
- The sector has seen strong growth of 15.5% since 2011 and plans for ambitious continued growth are in place.
- There are targets to increase: visitor numbers, visitor spend, overnight stays and the number of additional jobs supported by the sector.
- Sector growth targets outlined in Lancashire's Visitor Economy Strategy (2016-2020 can be see in the red diagram to the right).



Source: Lancashire Visitor Economy Strategy 2016-2020

Agriculture

Contribution to Lancashire's economy

- Approximately 10,000 people across Lancashire's work in the farming sector. This accounts for c. 3.4% of England's workforce highlighting the importance of the sector for the county.
- The fishing industry, focused around Fleetwood, is now fairly modest. However, relying on supplies arriving by road or port, fish processing remains an important local industry.
- Blackpool, Fylde and Wyre are important areas for pig farming. Combined they account for 57.3% of all British pigs.
- Farming in Lancashire is focused on fruit and vegetable production due to it's top grade farming land. Fruit and vegetable production account for 94% of in-use farming land in Lancashire compared to 64% across the north west as a whole.

Local Authority breakdown of agricultural land

Local Authority ⁽³⁾	Number of holdings 2016	Hectares		
		Total farmed area		
		2013	2016	% difference 2016/2013
BLACKBURN WITH DARWEN	112	5 654	5 775	2
BLACKPOOL & FYLDE	174	11 183	10 961	- 2
BURNLEY	87	6 124	8 750	43
CHORLEY	253	13 859	13 710	- 1
HYNDBURN	108	4 160	3 862	- 7
LANCASTER	536	45 204	45 819	1
PENDLE	254	10 858	11 680	8
PRESTON	198	8 814	8 616	- 2
RIBBLE VALLEY	653	48 579	48 464	0
ROSSENDALE	197	8 675	9 548	10
SOUTH RIBBLE	170	6 941	7 925	14
WEST LANCASHIRE	411	23 207	24 004	3
WYRE	397	22 889	21 377	- 7

Source: Defra, 'Structure of the agricultural industry in England and the UK at June', 2013-16

Source:

Town centres and high streets

NB: Additional evidence required.



Lancashire Enterprise Partnership Limited

Private and Confidential: No

Date: Tuesday, 25 June 2019

A Cultural Strategy for Lancashire

(Appendix 'A' refers)

Report Author: Andy Walker, Head of Service – Business Growth

Tel: 01772 535629, andy.walker@lancashire.gov.uk

Executive Summary

At the June 2018 LEP Board a discussion took place around the opportunity to better consider culture as an economic driver, to support the establishment of a single co-ordinated voice for cultural priorities in the area and to better target DCMS and Arts Council England funding for Lancashire bodies and projects.

Arising from this, the Lancashire Enterprise Partnership commissioned Tom Fleming Creative Consultancy to produce a Cultural Strategy for Lancashire, the primary objective of the Cultural Strategy being to maximize the impact that culture can have as a catalyst for economic growth and regeneration across the County.

The Cultural Strategy will also support the development of a strategic framework to prioritise and maximise the impact of cultural schemes and opportunities, identifying where heritage, cultural and creative assets and opportunities could become catalysts for growth, and how local partners can maximise public funding to deliver wider public and private investment frameworks.

This work has the potential to contribute to the Local Industrial Strategy for Lancashire, complement the existing economic narrative and support Lancashire's overall inward investment proposition.

Recommendation

The Lancashire Enterprise Partnership Board is asked to:

- (i) Note that Tom Fleming consultancy will produce a final Cultural Strategy for Lancashire report; and
- (ii) Agree to delegate authority to LEP Chair and interim / permanent CEO to sign off the Strategy.

1. Context and Background

- 1.1 This exercise constituted the first time that the Lancashire Enterprise Partnership has considered culture and creativity as an economic driver, resulting in the production of a Cultural Strategy. It comes at a time when the direct and indirect benefits of culture to sustainable and inclusive growth, to place-making and to wellbeing, are becoming ever more understood and important at an international, national and local level.
- 1.2 For Lancashire, this Cultural Strategy is about increasing the readiness of the County to respond to opportunities and to help leverage strategic investment for cultural and creative initiatives that can act as drivers for growth. It sets out an overview of the strategic role of culture in Lancashire, identifies key opportunities for culture-led growth, and provides an overview of relevant priority actions.
- 1.3 The document is based on extensive consultation across the County and benchmarked against best practice in other parts of the UK and internationally. The study can also inform and underpin the development of the Local Industrial Strategy.

2. Consultation Activity

- 2.1 Tom Fleming Creative Consultancy has undertaken a series of consultation events with stakeholders to inform the development of the Cultural Strategy. These have included:
 - The Creative Lancashire Board
 - Lancashire Cultural Framework Board
 - Local Arts Partnerships
 - Arts Lancashire
 - Higher Education Institutions
 - Morecombe Artists' Colony
 - Marketing Lancashire
 - Lancashire Local Authority Leaders' Group
 - Key local authority culture leads
 - Key cultural organisations and
 - Lancashire's Arts Council National Portfolio Organisations (NPOs)
- 2.2 Within the consultation exercise, participants were to comment on the consultants' analysis of the current cultural landscape in Lancashire confirming cultural strengths and assets across the county as a whole.
- 2.3 It is also proposed that a Cultural Investment Plan will be a key output of the Cultural Strategy. The Cultural investment Plan would be overseen by a newly formed Cultural Development Board made up of cultural and creative stakeholders and representatives of local councils and the LEP. Indicative investment priorities are included in final draft of the Cultural Strategy for your comment and consideration.



3. Main Elements of the Strategy

- 3.1 The Cultural Strategy document sets a long term vision for the role of culture as an economic catalyst in Lancashire, based around increased connectivity, enhanced capacity, improved collaboration, bolder activity and a distinctive cultural narrative. The document also presents a SWOT analysis of culture and the cultural sector in Lancashire, coupled with an indicative investment plan for new, emerging and established assets. A headline summary and indicative action plan is presented in the section Lancashire Culture Re-Made section towards the end of document.

4. Next Steps

- 4.1 Following this discussion at the LEP, Tom Fleming Creative Consultancy will produce a final report. Final sign-off will be delegated to Chair of LEP and Interim LEP Chief Executive Officer.
- 4.2 We will also seek to build this enhanced level of intelligence around Lancashire cultural infrastructure into the emerging Local Industrial Strategy and to inform aligned work on a potential City of Culture bid and the formation of a Lancashire Cultural Partnership.

List of Background Papers

Paper	Date	Contact/Tel
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None		
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Reason for inclusion in Part II, if appropriate

N/A

Re-made: A Cultural Strategy for Lancashire Draft May 2019



Lancashire
Enterprise Partnership

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FOREWORD

To follow

DRAFT

Executive Summary

How can we maximise the impact that culture can have as a driver and enabler of economic growth and regeneration across Lancashire? That is the primary question asked by this Cultural Strategy commissioned by the Lancashire Local Enterprise Partnership (LEP). Central to the answer is that partners working across the County need to champion the role of culture and work together to establish a County *re-made* through the creativity of its people and quality of its cultural offer.

It is the LEP's first cultural strategy and comes at a time when the direct and indirect benefits of culture to people and places is better understood and for which the evidence is increasingly compelling. For Lancashire, this strategy is about increasing the readiness of the County to respond to opportunities and to help leverage strategic investment for cultural and creative initiatives that can act as drivers for growth and catalysts for innovation. This includes a focus on inclusive growth which embraces a diverse talent base.

Why is this strategy needed? While Lancashire has a cultural ecology every bit as vigorous and diverse as the County as whole, with nationally and internationally significant arts and heritage, matched by a patchwork of vital locally significant activity, there are important gaps and challenges holding back the sector being all it could. Geographically, the unique mix of a long coast-line, large rural areas, towns and small cities, is both a challenge (it lacks the catalysing power of a large city) and an opportunity (to make the

most of its diversity and extraordinary post-industrial heritage). Currently the county is often caught in a 'catch 22' when it comes to national funding. For example, Arts Council England are conscious that they need to redress the fact that they currently annually invest £7 per head across Lancashire's 1.5 million residents, compared to £35 in Liverpool and £38 in Manchester¹. However, the county's existing hard and soft cultural infrastructure makes delivering the outputs it invests in, from enabling high-quality culture to reach new audiences in new ways to supporting creative practitioners to flourish, a challenge. To change this and build a sector that is more sustainable and more resilient at a time when funding is likely to remain squeezed, will require the step change in strategic approach this strategy sets out.

The vision at the heart of the strategy is that by 2030

'Culture will sit to the heart of our approach to economic growth, it will drive innovation, and it will make our distinctive places more dynamic, resilient and open. Innovative cultural production and the networks and hubs which support it, will change our economy for the better, change the way people view and value Lancashire, and support more confident and cohesive communities.'

In delivering this there will be five outcomes against which success will be judged:

- 1. Increased Connectivity:** A better connected cultural and creative sector that sees the main urban areas, smaller towns and rural areas, working collaboratively to build scale, presence and impact. By working together, the diversity of places in Lancashire can more effectively develop a clear offer and role which resonates locally, nationally and internationally for audiences and markets.

¹ Regeneris

2. **Enhanced Capacity:** A stronger, more diverse and sustainable, and an appropriately skilled cultural sector – delivered by scaling up organisations to support the next generation of leaders and innovators. Cultural organisations and infrastructure will be positioned to deliver positive outcomes for economic growth and high-quality places.
3. **Improved Crossovers:** An international reputation for the strength, depth and ingenuity of our partnerships and collaborations. These will promote convergence and innovation across our strengths in culture, creativity, research, science, technology and manufacturing
4. **Bolder Commissioning and Innovative Infrastructure:** Be recognised for the strength of Lancashire's connected cultural and creative infrastructure, delivering high quality work to diverse audiences in historic and state of the art buildings and more widely through communities, businesses higher education, colleges and schools.
5. **Compelling cultural narratives:** Be recognised nationally and internationally for the distinctiveness of places, people and environment; with the cultural offer and cultural life making Lancashire a highly attractive place for residents, visitors, workers and investors.

Central to delivering these outcomes will be the establishment of a Cultural Investment Plan which brings together planned and potential short, medium- and long-term actions and projects into a thematic framework and overall narrative which partners can jointly support. The Plan will inform and feature within the pending Local Industrial Strategy as well as strongly connecting with the LEP and County's overall strategic goals and frameworks. The Investment Plan's four areas are:

1. **Fit for Purpose Infrastructure:** Projects which will support more resilient and sustainable sectors as well as supporting regeneration revitalisation of urban centres, boosting the visitor economy. This includes supporting transformative projects already in the pipeline such as the New Museum in Blackpool, Eden project North in Morecombe, the re-imagining of the Harris and Linear Park.
2. **Scaling-up Events and Festivals:** Scaling up the county's increasingly popular and growing portfolio of festivals and events will better connect its cultural offer, increase reach and visibility, boost the visitor economy and deliver the multiple benefits that large, open cultural activity delivers. Potential opportunities include supporting a county-wide bid for the UK City of Culture, the next round of Creative People and Places and the planned UK-wide Festival of Creativity and Innovation planned for 2022.
3. **Supporting convergence:** A programme of activity that connects up the County's strengths in research, advanced manufacturing, science and technology with its growing creative strengths. Potential projects include scaling-up the National Festival of Making so it can to deliver innovation and industrial change throughout the year, and working with university partners to support a collaborative R&D hub and platform to drive innovation and growth in knowledge-intensive sectors across the creative, cultural, science and tech areas.
4. **Building Capacity:** A programme of activity that boost skills, sustainability and resilience across culture and the creative industries. Projects include building on the Creative Lancashire's and other existing creative enterprise support programmes, working with the region's universities and Lancashire Skills Hub to develop a tailored skills and capacity-building programme for a new cultural workforce,

developing culture's role in strategic commissioning in health and wellbeing, developing a county-wide strategy for increasing film and tv production and capability.

The delivery of the Investment Plan will involve close partnership working between national funders, local government, cultural, educational, public and private sector partners. To ensure this happens the next step for the LEP will be to oversee the development of an advisory Cultural Investment Board to provide expert advice to the LEP and local authorities made up of a broad range of stakeholders. This board will then refine and develop the Investment Framework as a means of bringing the strategic step-change to deliver a County *re-made* through culture and creativity.

view and value Lancashire, and support more confident and cohesive communities.'

Together with our partners we will work on delivering the following outcomes by 2030:

6. **Increased Connectivity:** A better connected cultural and creative sector that sees the main urban areas, smaller towns and rural areas, working collaboratively to build scale, presence and impact. By working together, the diversity of places in Lancashire can more effectively develop a clear offer and role which resonates locally, nationally and internationally for audiences and markets.
7. **Enhanced Capacity:** A stronger, more diverse and sustainable, and an appropriately skilled cultural sector – delivered by scaling up organisations to support the next generation of leaders and innovators. Cultural organisations and infrastructure will be positioned to deliver positive outcomes for economic growth and high-quality places.
8. **Improved Crossovers:** An international reputation for the strength, depth and ingenuity of our partnerships and collaborations. These will promote convergence and innovation across our strengths in culture, creativity, research, science, technology and manufacturing
9. **Bolder Commissioning and Innovative Infrastructure:** Be recognised for the strength of Lancashire's connected cultural and creative infrastructure, delivering high quality work to diverse audiences in historic and state of the art buildings and more widely through communities, businesses higher education, colleges and schools.
10. **Compelling cultural narratives:** Be recognised nationally and internationally for the distinctiveness of places, people

1. 2030 VISION AND FIVE OUTCOMES

'Culture will sit to the heart of our approach to economic growth, it will drive innovation, and it will make our distinctive places more dynamic, resilient and open. Innovative cultural production and the networks and hubs which support it, will change our economy for the better, change the way people

and environment; with the cultural offer and cultural life making Lancashire a highly attractive place for residents, visitors, workers and investors.

These five outcomes will be delivered through the Cultural Investment Plan, which will prioritise strategic investment in infrastructure, people, capacity, skills, networks and programmes to boost economic growth and help meet local challenges.

2. CULTURE AND GROWTH

“The Industrial Strategy White Paper found that, alongside transport links, housing, skilled labour and rich innovation ecosystems, an attractive cultural environment was a key attribute for a local economy to succeed”.

“Cultural and creative investment can drive economic growth by making them attractive locations to live and work.”

Creative Industries Sector Deal, DCMS, 2018.

The creative and cultural industries are vital drivers of the UK economy. They have grown twice as fast as other sectors since 2011² and now account for more than five per cent of the UK economies GVA³. The creative industries are worth over billion to the UK economy and employ two million people⁴. This is 6 per cent of UK employment and has shown 28.6 per cent growth since 2011⁵.

This growth has partly been driven by activities related to digital technology (e.g. video games, film and television). Yet growth has been characterised by increasing interdependencies and value-chain relationships between different types of creative activities and cultural activities, including those traditionally ‘subsidised’ sectors such as visual and performing arts. There have been related positive trends in fashion, design, music, literature and publishing; collectively contributing to a creative economy that has art and culture to its core.

UK Labour Market projections⁶ illustrate that this buoyant trajectory is likely to continue and that creative occupations will grow by over 5.3% over the next six years. This is double the projected job growth across the national economy and represents an additional 119,495 creative jobs by 2024.

With targeted investment, Nesta and the Creative Industries Council⁷ forecast that over 1 million new creative jobs could be created by 2023, with many such jobs in the arts and cultural sectors, which are helping to drive innovation and make places more attractive and dynamic. Targeted investment can also have a major impact on the identity and brand of a place, with significant ‘soft power’ to be made through a dynamic cultural and creative economy. This is accepted in the UK Government’s ‘sector deal’ for

² Creative Industries Sector Deal, DCMS and BEIS

³ DCMS Sector Economic Estimates 2018

⁴ Creative Industries Sector Deal, DCMS and BEIS

⁵ DCMS Sector Economic Estimates 2017

⁶ Creativity and the Future of Work, 2018, Nesta

⁷ Creativity and the Future of Work, 2018, Nesta

the creative industries, which champions both the direct and spillover effects of culture⁸.

Highly productive and resilient

The creative and cultural industries are recognised as highly productive. Evidence demonstrates that creative businesses are more productive than companies in other sectors in almost all parts of the economy. Creative businesses with fewer than ten employees have a GVA per worker that is 20 per cent higher than similar sized businesses in other sectors⁹.

Part of a wider economy

All sectors, at least in part, utilise and are influenced by the creative and cultural industries. Activities related to marketing, architecture, design, technology etc. are used by industries ranging from car manufacturing and utilities to education and healthcare. There are more creative occupations outside the creative industries, such as design in manufacturing, marketing and digital innovation specialists in finance and health sectors, than there are within the creative industries. There are 1.08 million creative occupations outside the creative industries, 1.05 million with the creative industries¹⁰.

The creative and cultural sector also supports the wider economy through its supply chains. As an example, the National Theatre spends money across a range of different areas:

- **60% of spending on services:** events management (4%), technical services (3%), logistical and transport (2%), representation (7%), communications (10%), business support services (16%) and AV production (18%)

- **6% of spend on goods:** equipment (3%), other (2%) and manufactured goods (1%)
- **17% of spend on buildings:** maintenance and management (10%), construction and installation (5%) and utilities (2%)
- **13% on creative production:** artistic creation (6%), performing arts (7%) and supporting services to performing arts (4%)¹¹.

Arts and culture: driving innovation and growth across the creative industries and enhancing the quality of place.

The higher growth parts of the creative industries (e.g. in digital, audio-visual and design), source their talent and access the ideas and content services of the wider arts and cultural sector. They operate in an increasingly integrated and convergent way – e.g. in hubs and clusters and through collaborative practice across the value chain. The arts and culture industry, as a sub sector of the creative industries¹² has grown 10 per cent in a year, and now contributes £8.5bn to the UK economy. More than double that of the Premier League¹³.

The arts and cultural sectors employ 674,000 people, accounting for 2 per cent of jobs in the UK in 2016. They have seen a 23.6 per cent growth in jobs since 2011¹⁴.

⁸ <http://www.thecreativeindustries.co.uk/media/462717/creative-industries-sector-deal-print.pdf>

⁹ *Creativity and the Future of Work, 2018, Nesta*

¹⁰ *Creative Industries Sector Deal 2018*

¹¹ *Creative Supply Chains Study 2018, We Made That and Hatch Regeneris*

¹² It should be noted that there is considerable cross over in the creative and cultural industries as defined by DCMS. Film, radio, TV, music, visual and performing arts, libraries and museums are considered to be in both the cultural and creative industries. The operation of historic and heritage building and attractions are considered to be in the cultural sector but not the creative industries.

¹³ *Contribution of arts and culture to the UK Economy, 2017, Cebr for Arts Council England*

¹⁴ *DCMS Sectors Estimates 2017*

There were £6.3bn exports of arts and culture goods and services in 2015¹⁵ and culture pays £2.6bn in taxes, £5 for every £1 of public funding¹⁶.

Arts and cultural activities are also particularly **impactful for specific places**: providing a distinctive identity and energy, helping to reinvigorate the social and economic life of a district, town or city. Their role in spearheading regeneration, in anchoring developments and in providing a more diverse and engaging economic offer, are now well known. In the UK, major recent high-profile successes include Liverpool as European Capital of Culture in 2008 and Hull as UK City of Culture in 2017. In Manchester, next-generation cultural infrastructure such as HOME and the forthcoming Factory; and innovative programming such as the Manchester International Festival; are part of a long-term strategy to diversify the economy and reboot Manchester as a major European city. In smaller places – from Norwich to Margate – culture and the arts have been integral to economic development. With Norwich, this has been part of a LEP-wide embrace with the economic and social transformation power of culture – as championed in the New Anglia LEP Strategy: *Culture Drives Growth*.

Heritage – Enabling culture to thrive

The heritage sector is also an important source of economic prosperity and growth, as well as making a hugely valuable contribution to a sense of place and wellbeing of communities.

The heritage sector now contributes £13.1 billion directly to the economy in England, with every £1 of GVA generating a further £12.1 in the wider economy.

The heritage sector employs 196,000 people directly and an estimated additional 156,000 in the wider supply chain¹⁷. It is through the contemporary use of heritage assets – as visitor attractions and for creative and cultural production – that significant parts of the cultural sector gain their inspiration and distinctiveness.

Tourism – Culture at its heart

The UK tourism sector directly employs 1.56 million people, 4.8 per cent of UK employment, a 7.4 per cent increase since 2011¹⁸. Tourism contributed £48bn to the UK economy in 2016¹⁹.

£16.9 billion per annum is generated through heritage tourism spend²⁰.

In Lancashire the tourism or ‘visitor economy’ economy continues to grow:

- The visitor economy generated £4.25 billion for Lancashire in 2017, up 2.9% since 2016. Day visitors generated £2.06 billion in 2017, an increase of 3.2% on the previous year, but staying visitors generated even more at £2.2 billion, an increase of 2.8%.
- Visitor numbers increased from 67 million to 67.63 million over the same period.
- There has also been a 1% increase in jobs in the tourism and hospitality sector²¹.

¹⁵ DCMS Sectors Estimates 2017

¹⁶ Contribution of arts and culture to the UK Economy, 2017, Cebr for Arts Council England

¹⁷ Heritage and the Economy 2018, Cebr for Historic England

¹⁸ DCMS Sectors Estimates 2017

¹⁹ Visit England 2017, https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/england_tourism_factsheet_2017_without_infographic.pdf

²⁰ Heritage and the Economy 2018, Cebr for Historic England

²¹ <https://businesslancashire.co.uk/2018/10/30/lancashire-visitor-economy-continued-to-grow-in-2017/>, October 2018

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The Lancashire region's cultural attractions welcome 64 million visitors a year, generating an economic impact of £3.8 billion. Blackpool is the number one visited seaside resort in the UK²².

More than just growth – Culture's wider role

The way that culture improves quality of life and quality of place is increasingly understood and valued. Culture is enhancing the quality, distinctiveness and energy of community and place. It is improving lives and enhancing health and wellbeing. From the role that active participation in culture, including volunteering, can have in boosting mental health and wellbeing at all ages, to way that it can play a part in strengthening the day and evening offer in high streets and urban centres, culture is a vital element of civil society. Arts Council England's new (draft) ten-year strategy sets out a set of five outcomes. These are useful as they describe some of the key ways that culture benefits places and people and the changing nature of culture and creativity.

ACE says that the next decade will see a wider range of culture and individual creativity championed, more support for partnerships focused on improving health and wellbeing (including social care providers). ACE also indicates there will be a more strategic approach to place-based partnerships requiring publicly funded organisations to deliver shared outcomes, better advice and information for the public on what is available locally and more funding for places with historically less provision. There will be more support for independent creative practitioners, a bigger role for National Portfolio Organisations in supporting creative talent outside their organisations, more emphasis on risk taking and research and development. There will be a big push on diversity and access, with more help for disabled people working in creative organisations.

There will be more advocacy for a high quality, relevant arts curriculum and support for more local cultural education partnerships. Cultural organisations will be encouraged to learn from entrepreneurs and the creative industries, to work with technology companies and encouraged to take part in new types of funding such as crowdfunding or challenge prizes. There will also be a greater push in ensuring that the global reputation of quality of the UK's creative industries is supported through partnerships.

Culture and the LEP's Strategy

The LEP will be with developing a Local Industrial Strategy for Lancashire in 2019. This will build on its previous Strategic Economic Plan from 2014 and will build on its current priorities. At the heart of the strategic plan from 2014 was the concept of the arc of prosperity:

"The overarching purpose of the SEP and Growth Deal is to re-establish Lancashire as an economic powerhouse and a national centre of excellence in advanced manufacturing by maximising its clear competitive strengths and capabilities in the aerospace, automotive, energy and health science related sectors... the LEP will harness the power and potential of our national industrial hotspots; our key strategic sites; our key clusters of high value activity; and our internationally recognised centres of excellence in research and innovation."

While this strategy acknowledged the importance of heritage and the visitor economy in supporting the development of the strategic vision, culture was not specifically mentioned (though creative industries were). Alongside the Industrial Strategy the Preston, South Ribble and Lancashire City Deal also opens up opportunities for culture to add value and in some cases play a central role – e.g.

²² Source: Lancashire County Council, Cultural Strategy for the Lancashire Enterprise Partnership, March 2018

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through a focus on housing, skills, infrastructure and placemaking initiatives.

For the LEP's Local Industrial Strategy, the direct and indirect impact of culture and the creative industries will be strongly reflected in the way they can support:

- **Skills:** with culture playing a leading role in attracting and retaining talent to high value industries and with an uplift in the skills market within the cultural sector to improve its performance (growth, innovation and resilience).
- **Placemaking:** with culture – from festivals to innovative cultural infrastructure – energising places, providing spaces for creative expression, inspiring participation and enhancing the attractiveness of urban centres as a complement to the wider retail and leisure mix.
- **Jobs:** with culture and the creative industries high growth and enhancing the competitiveness and growth of knowledge-intensive industries such as advanced manufacturing and life sciences.

The DCMS recently published guidance for the LEPs on integrating all its sectors into Local Industrial Strategies²³. For arts and culture, it emphasizes how investment in culture can multiply the benefits of investment in other infrastructure. In one example particularly relevant for Lancashire it states

“Culture 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.

Housing expansion plans should consider how new settlements will be integrated into the existing place.”

For Creative Industries the handbook stresses how local strategies can be targeted at weaknesses within the sector. This includes existing and emerging skills gaps, challenges obtaining finance and investment while stressing the need to encourage R&D and convergence:

“Reduced capacity for, and access to, R&D (relevant to the Ideas foundation of the Industrial Strategy). While the creative industries are highly innovative and an important part of the UK's research agenda, they can lack the capacity for strategic, cross-sectoral R&D, including linkages with universities.”

In terms of Heritage, the handbook includes a case study of the Cross-Pennine work being done by Heritage England to understand the potential for growth that vacant textile mills offer, something of real relevance to Lancashire. This work shows that economic benefits are not always fully captured by purely private investors due to the poor condition of many assets. It states that the *“project concluded that across West Yorkshire and the North West there is 3m sqm of untapped economic potential which could provide 35,000 homes, 200,000 jobs, £9bn GVA and £23m PA in Business Rates.”*

Culture in Lancashire can then play a transformational role: nurturing a stronger and more diverse economic base, infusing innovative practice and greatly enhancing the quality of place. With the right level of support, investment and

²³ Connected Growth - A manual for places working to boost their

digital, cultural and social connectivity

coordination, the talent, heritage and identity of the county can play a starring role in a re-imagined cultural offer: a Lancashire re-made.

3. CULTURE AND CREATIVITY IN LANCASHIRE

Lancashire's culture and creative industries are every bit as diverse as the County as a whole. Across Lancashire, locally-significant cultural ecologies are enlivening places and helping to re-shape their economies. In the urban centres, such as Blackpool, Blackburn, Burnley, Lancaster and Preston, increasingly growth-orientated creative enterprises are helping to generate jobs and spillovers, often in former industrial settings. Along the coast, culture is closely linked to longstanding traditions of leisure tourism – a core part of the entertainment industry or 'experience economy'. Inland, the beautiful natural environment in places such as the Ribble Valley and Forest of Bowland, provides an inspiring setting for artists and artisans, who in turn are facilitating growth in cultural tourism and rural making.

A changing population, especially in the urban centres and Pennine Lancashire, is bringing a new youthful, diverse and globally connected community, which in turn is opening up opportunities for growth and innovation in the creative economy and wider cultural sector. This includes opportunities for market development – from Mumbai to Warsaw – with new trajectories of cultural production

helping to renew the identity of Lancashire as a place of innovation and making. It also means new opportunities for our cultural organisations to grow alongside these new audiences creating employment.

Making, something that was synonymous with Lancashire during the Industrial Revolution, has not gone away. Today it is celebrated in a growing number of events, most importantly the National Festival of Making in Blackburn. It is a tradition carried on by designer makers and crafts people, artists and producers, such as internationally renowned and commercially successful sculptor Charles Hadcock and his neighbours Roach Bridge Tissues. There are also world-class advanced manufacturers such as BAE Systems. It is something that will be at the heart of the re-imagined Harris in Preston. Indeed, it is through craft, design and making that the cultural life of the County thrives – from the innovation and resourcefulness of its festivals to the specialisms of its universities (e.g. fashion at the University of Central Lancashire).

More widely, culture is part of the growing sense of civic confidence seen in the revitalization and regeneration of urban centres. While there is still much to do, in Blackpool, Blackburn, Burnley, Lancaster and Preston, cultural and creative activity and infrastructure are playing a part in helping shape more attractive, liveable and investable urban centres and neighbourhoods.

An example of this in action is the rise of festivals across the county from the Highest Point Music Festival in Lancaster through to LightPool in Blackpool, the County has seen the rise of events which tap into the growing market for experiences. The National Festival of Making in Blackburn connects creativity to the wider economy through its Art in Manufacturing programme, pairing artists in traditional and advanced manufacturers. The Sparks Festival run by Super Slow and the British Textile Biennale will further connect people to the industrial past. It will see young

people work with digital and light artists along the 20 mile stretch of the Leeds Liverpool canal.

Cultural tourism is something that the County has specialised in since the Victorian era. Blackpool is one of the most famous seaside resorts in the world, with visitors coming from all over the globe attracted by the fame and popularity of its offer and the ongoing popularity of ballroom dancing. The town that once pioneered working-class entertainment is now taking a leading role in the way it is maximising its cultural assets for physical and social renewal – from the success of the ‘Comedy Carpet’ (a unique celebratory piece of public realm), through community engagement (led by LeftCoast), the work of the Grand in actively engaging new audiences through to the development of a major new museum which will for the first time capture Blackpool’s unique heritage and contribution to the cultural life of the UK for future generations.

Strong and dynamic partnerships and networks exist across the County. This includes Creative Lancashire and the networks it supports (including POWWOW, Conversations in Creativity, Sound Bytes & Screen Opps), Digital Lancashire, and Arts Lancashire, plus four Local Cultural Education Partnerships. These facilitate collaboration across the county and build capacity for the cultural sector. Creative Lancashire and NESTA are also collaborating to develop a Creative Enterprise Toolkit and Programme to build capacity in creative and cultural sector organisations, such as through the generation of intellectual property which can help spark innovation and growth.

Lancashire’s Universities are increasing their footprints and impact beyond teaching and research, playing ever stronger roles in local communities through knowledge exchange with industry, commissioning in events and festivals, and professional support for entrepreneurs and cultural professionals. Individually the three universities manage theatres and art galleries, catering for the wider community, as well as managing programmes of support for

artists and delivering cross-over projects which bring together culture with technology and other University departments. Of course, they are also vital providers of cultural and creative talent, infusing the Lancashire economy with highly skilled and entrepreneurial people. With the ongoing expansion and diversification of the universities, and an ongoing shift toward stronger industry partnerships and closer alignment to civic and place-making agendas, their role in supporting the growth and innovation of the Lancashire cultural sector will become even more important.

Culture in Lancashire is thriving because it is a place where people get involved, are resourceful and like to make. However, this is too often in spite of a set of systemic barriers to participation and growth. They severely hamper the capability of culture to play a productive role in economic development and link it more to delivering social outcomes to guard against community fragmentation and dislocation.

For example, the size and scale of cultural institutions and organisations is a fundamental issue. There are not enough large cultural organisations which can deliver the scale, reach, agility and quality of cultural experiences enjoyed in other parts of the UK. Smaller cultural organisations also often lack the capacity to experiment with new technology, new ways of reaching audiences, to use data and research, or to generate innovative funding models and more. While the County has 9 organisations that are part of Arts Council England’s National Portfolio – a sign they are judged to be of national importance – none of them has the size or scale of the more generously funded or strategically positioned organisations to be found in Manchester or Liverpool, or even smaller places such as York or Derby. Many of them operate on significantly less funding than other comparable organisations in comparable places.

This 'cultural infrastructure deficit' is partly a question of geography and reflects the relative size of Lancashire's urban centres. Or in other words, cultural organisations in Lancashire are, broadly, relatively small and thus struggle to develop the capacity and strategic muscle required to give confidence to investors such as Arts Council England that the sector can scale up with minimal risks. This creates a 'chicken and egg' dilemma, where the sector needs to scale-up to deliver on its potential and to ensure relative parity of investment to other parts of the country; but it lacks the capacity to do so.

In terms of funding per head of population, Arts Council England spends £7 per head across Lancashire's 1.5 million residents, compared to £35 in Liverpool and £38 in Manchester²⁴. Local authorities, as relatively small districts or unitaries, do not have the spending power and in some cases have sought to disinvest from culture as a response to the national Government's policy of austerity. This in turn reduces opportunities to attract investment from other sources and build capacity so the county can more effectively attract investment from Arts Council England, the Heritage Lottery Fund, and other sources.

In addition, the cultural organisations of Lancashire are not evenly distributed, meaning that many communities are not as well served as others. While there are networks and consortia, marketing or audience development are not as joined up as other parts of the country. The success of the 2 Creative People and Places programmes - Left Coast in Blackpool and Super Slow Way in Pennine Lancashire - show the benefit of sustained partnership working and collaborative practice. The county's diverse population naturally has international connections, but, possibly due to size

and scale issues, international connections are not as well developed as they could be.

While there are strong examples of larger national and international cultural organisations working in Lancashire, such as the Royal Shakespeare Company's long-standing partnership with the Blackpool Grand and Manchester International Festival's work across the region and the BBC Philharmonic's partnership with Lancaster University, there is scope to build stronger partnerships to help grow local capacity and reach a larger audience.

The universities, while leading the way in many respects, could play an even more pivotal role in driving a more cross-sector and convergent work between sectors building on the work of existing initiatives including Lancaster Arts and the Institute for Creative Exchange at Edge Hill. The proactive alignment of institutional and civic interests could provide fruitful opportunities for Lancashire's universities. There is much good practice across the country which could inspire step-change in the way local universities support culture-led investment and the creative economy. This includes the University of Sheffield, which has played a defining role in setting up the Sheffield Cultural Consortium, attracting inward investment (such as the Cultural Destinations Fund), delivering cultural programming (such as via the Festival of the Mind²⁵ and Off the Shelf²⁶ festivals) and driving creative and technology growth (as partners to the Sheffield Advanced Manufacturing Park). In Bristol, the University of West of England helped revitalise the city's cultural infrastructure by taking space, investing in collaboration and driving business development in organisations such as Spike Island²⁷, Arnolfini²⁸ and the Pervasive Media Studio²⁹ in Watershed. In

²⁴ Regeneris

²⁵ <https://festivalofthemind.group.shef.ac.uk/>

²⁶ <http://www.offtheshelf.org.uk/>

²⁷ www.spikeisland.org.uk

²⁸ <https://www.arnolfini.org.uk/>

²⁹ <https://www.watershed.co.uk/studio/>

Re-made: a cultural strategy for Lancashire

Exeter, the University's new Cultural Strategy³⁰ talks of establishing 'purposeful partnerships' via commissioning, joint ventures and talent development activities.

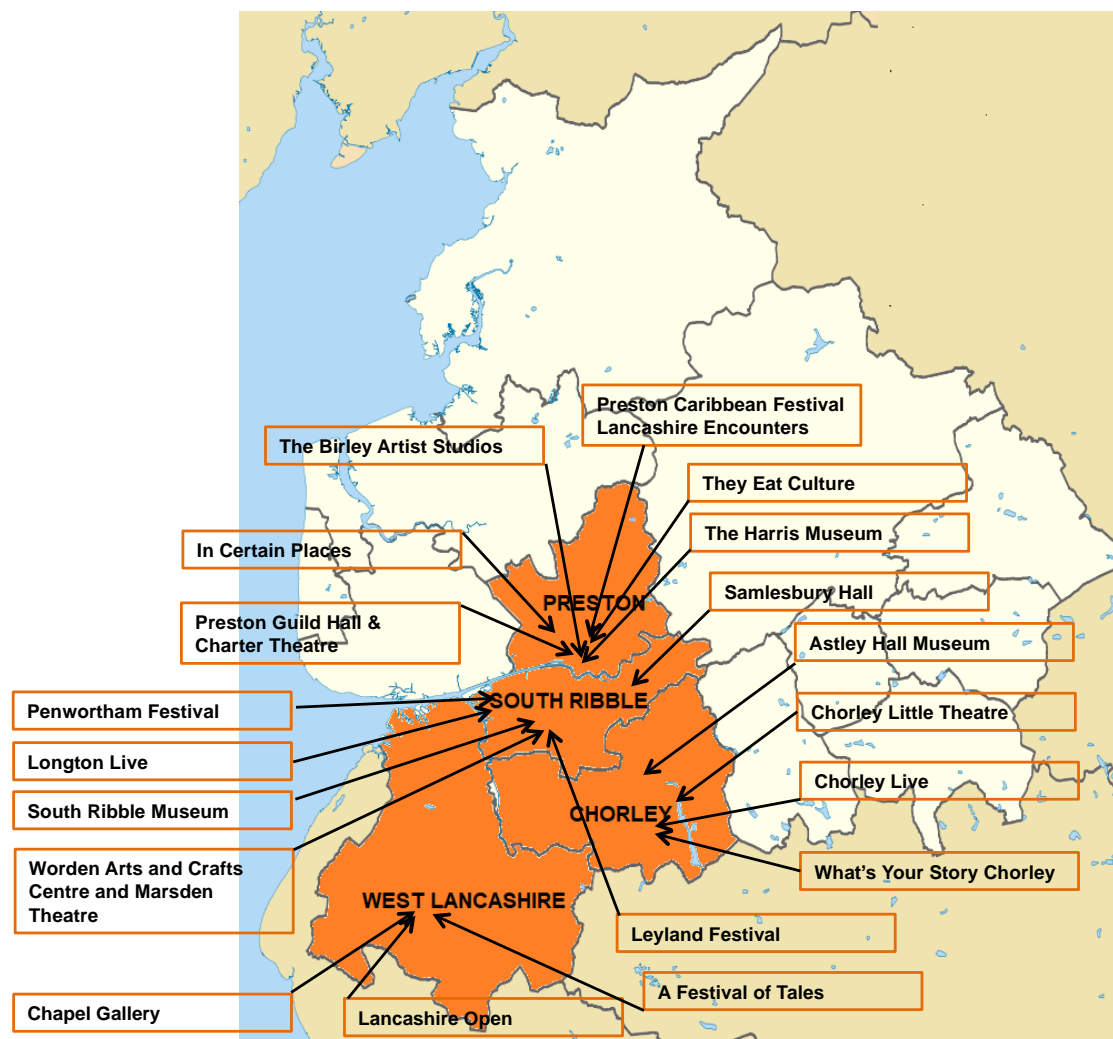
In Lancashire, the university sector is already a real driver of innovation and growth for the cultural sector and wider creative economy. With the coming Local Industrial strategy their ability to do even more will be at the fore. For example, the county's economic strengths in advanced manufacturing would be made even more competitive through developing more connections with its creative industries – e.g. in interdisciplinary R&D and the creative application of new technologies. There is also scope to

explore links between culture and health, technology and wellbeing – e.g. via the Lancaster University Health and Innovation Park³¹.

Figures 1- 3 below give a flavour of just some of Lancashire's cultural assets. To these could be added numerous other examples of Lancashire's unique cultural history and heritage including cathedrals and country houses, castles and canals, places of popular entertainment, The Royal Lancashire Show and local festivals – all of which make a huge contribution to the distinctive cultural offer of Lancashire. Also see **Appendix 1**, which provides an overview of the range of cultural organisations and programmes across each district in Lancashire.

³⁰ <https://www.artsandcultureexeter.co.uk/>

³¹ <https://www.lancaster.ac.uk/health-innovation/>



Some select highlights (Fuller list in the Appendix)

Preston Guild, dating back to 1179, every 20 years, renewal of the Guild Court, with procession and celebration events.

Preston Guild Hall and Charter Theatre, versatile space with concert arena and 780-seat theatre, for music, comedy and family shows. A growing focus on engagement and youth.

Birley Studios, artist and project space in Preston City Centre.

Mirador Theatre, Lancaster, an innovative and engaging performing arts organisation.

Curious Minds, the North West of England Arts Council England's Bridge Organisation – championing creative education and learning. Also leaders of the Cultural Education Challenge in the region.

Peoples Production Lab, Preston – a hack space and collaborative platform for creative and digital practice – led by **They Eat Culture** - programming, commissioning and producing quality arts & cultural work, into the cultural life of Preston and Lancashire.

Lancashire Encounters, annual festival celebrating the breadth of the Lancashire's diverse cultural offer with high quality and high-profile arts.

Preston Caribbean Carnival, the largest and longest running cultural celebration in Preston outside of the Preston Guild, attracting tens of thousands of visitors each year.

Preston Mela, one of the longest-running and most dynamic melas in the UK.

Institute for Creative Exchange, Edge Hill University. A practice-led and theoretically grounded interdisciplinary research forum which connects the University with the digital and creative economy and with cultural institutions.

Samlesbury Hall – 14th century manor house and gardens with gallery and events.

The Arts Centre at Burscough Wharf, a venue for events, exhibitions, cinema showings, theatre productions, live music, dance and comedy.

Figure 2. Cultural Assets in Pennine Lancashire



Some select highlights (Fuller list in the Appendix)

Horse and Bamboo (ACE NPO), is a puppet and mask theatre company serving the community of Pennine Lancashire as well as touring productions for adults and children nationally and internationally. The Boo theatre, based in Rossendale, hosts puppetry films and other performances.

Festival of Making - Taking place over two days in May, with activities throughout the year, the festival takes over the streets of Blackburn with music, markets, street food, art, performance, tours, talks and an eclectic mix of making experiences for people to get involved in.

Super Slow Way is an arts programme in Pennine Lancashire shaped by local communities working alongside a wide range of local, national and international artists and producer. One of 21 Arts Council England Creative people and Places programmes and one of two in Lancashire. LeftCoast Blackpool and Wyre the other.

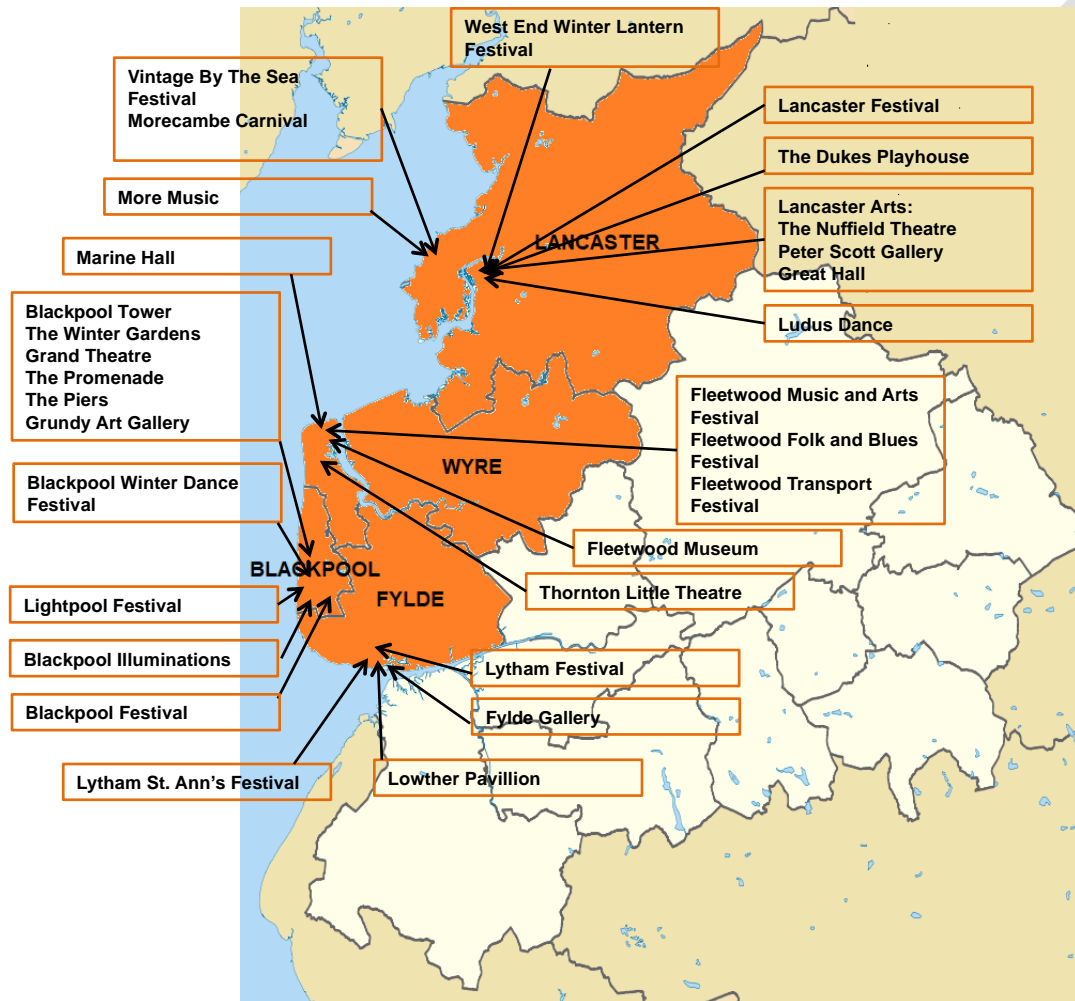
The British Textile Biennial, part of the Super Slow Way. Previously Fabrications, this major event will throw a spotlight on the nation's creation, innovation and expression in textiles against the backdrop of the impressive infrastructure of the cotton industry in Pennine Lancashire.

In Situ, Pendle – an innovative arts development organisation, opening up audiences and transforming places through art.

Gawthorpe Hall, near Burnley, a National Trust property with an incredible collection rich in Gothic Revival furniture, metalwork and textiles.

Burnley Youth Theatre (ACE NPO) Burnley Youth Theatre is based at purpose-built venue in Burnley, including a 158-seat theatre, 3 studio spaces and 2 outdoor spaces. They produce and programme a wide range of creative activities, productions and events engaging children, young people and families.

Figure 3. Cultural Assets in West Lancashire



Some select highlights (Fuller list in the Appendix)

Chapel Gallery arts centre, in Ormskirk combining internationally regarded artists exhibitions with, contemporary art and craft from across the UK, and supporting local artists with career development.

Lowther Pavilion, a theatre and community arts space with programme of music, theatre spoken word comedy and more, at the heart of Lowther Gardens in Lytham St Annes.

Grundy Art Gallery, one of the most significant contemporary art galleries and an Arts Council National Portfolio Organisation, recent exhibitions have included acclaimed artists including Martin Creed, Brian Griffiths, David Hockney, Pierre Huyghe, Heather Phillipson, Susan Philipsz and Matt Stokes.

The Dukes Playhouse theatre in a converted church in Lancaster is a much-praised repertory theatre and cinema. It is Lancashire's only professional producing theatre, producing five shows a year including an outdoor Promenade performance and a Christmas family show.

Lancaster Festival, 10 days in July celebrating art music and community. From Lancaster Orchestra concerts through brass bands and tribute bands, to art exhibitions and workshops, guided art walks.

The Making Rooms – Blackburn supported with LEP funds and resources, it is a place where creativity, technology and advanced manufacturing come together in a community facility for use by businesses, artists, students.

3.1 Cultural Strengths in Lancashire

- **Established organisations:** 9 Arts council England National Portfolio organisations (NPOS) delivering excellence, reach and innovation in cultural provision - including Grand Theatre Blackpool, Dukes Theatre, Lancaster Arts, Ludus Dance, More Music, The Harris, Horse & Bamboo, Burnley Youth Theatre, In-Situ
- **Place-based programmes:** A portfolio of tailored local cultural provision, helping to build distinctive communities and places – e.g. 2 ACE-supported Creative People and Places programmes – Super Slow Way in Pennine Lancashire and Left Coast in Blackpool and the Wyre. Plus, Curious Minds – the Arts Council England Bridge organisation for creative and cultural education.
- **Culture and education partnerships:** Four Local Cultural Education Partnerships – in Lancaster, Pennine Lancashire and Preston – are helping to build a local talent base and ensure culture is not squeezed from the educational experience of young people. Blackpool was one of the first across the country and was used as a case study of excellent practice by ACE.
- **Growing Creative Networks:** Organisations including Creative Lancashire, Digital Lancashire and Arts Lancashire, are facilitating collaboration across the county and building the capacity for the cultural sector. These networks and the hubs that support them (including co-working and studio spaces such as Society 1 and Cotton Court in Preston and The Storey in Lancaster) are facilitating exchange, building capacity and nurturing innovative practice.
- **Growing Creative Industries:** 13,440 people in Creative employment across the County, with the sector growing by 4% between 2015 and 2016. This includes some genuine innovators – e.g. in design, digital and festivals.
- **A County of Festivals:** A growing festival ecology which is generating significant tourism and spearheading approaches to 'making' and cultural production - including Lancashire encounters, Lytham Festival, Highest Point, the National Festival of Making, Lightpool Festival, Fleetwood Music and Arts Festival, the British Textile Biennale, Vintage by the Sea, Cloudspotting and the once-in-a-generation Preston Guild.
- **A solid infrastructure base – the Museums and Heritage sector:** ranging from significant museums and buildings such as the Gawthorpe Hall, Howarth Museum, The Harris Lancaster Castle and Townley hall to the unique Industrial heritage found all over the County.
- **A network of 64 Libraries** – ranging from small community focussed libraries through to large city-centre premises which deliver a wide-ranging set of services to 3.7 million users from health and wellbeing through to skills and activities focussed on young people and vulnerable groups.
- **Local cultural ecologies:** Independent artists groups and networks are working with larger cultural organisations to give real distinctiveness and texture to the cultural life of Lancashire, as well as providing jobs and driving cultural tourism. Exemplars include the work of Deco Republique in mobilising creative activity, They Eat Culture, More Music and Morecombe Artists' Colony
- **Excellent University Sector:** Edge Hill, Lancaster University, University of Central Lancashire and University of Cumbria are expanding their civic and creative roles, supported by a strong FE sector. The new campus being

developed by UCLan in Burnley shows their ambition stretches beyond their existing footprints.

3.2 Cultural Weaknesses in Lancashire

- **Size and capacity:** Lack of large-scale cultural organisations of comparable scale and reach and resource to other parts of the UK with a similar population and urban profile (e.g. Kent – which, like Lancashire, does not have a core city at its heart). While this does give some agility and a leaner, less subsidy-dependent sector than elsewhere, the lack of scale and capacity limits opportunities to build on cultural potential and be ambitious.
- **Geographic challenge:** Combination of relatively small urban centres spread across a large area with sometimes poor public transport, issues with digital infrastructure in some rural areas, plus the benefits/disbenefits of proximity to large cities which both provide opportunities (e.g. audiences and resources) and challenges (attracting investment and audiences which might otherwise provide value to Lancashire).
- **Austerity and funding:** Historically lower levels of national funding per capita, compounded by austerity and reduced investment by councils in culture, libraries, parks and heritage. In terms of funding per head of population Arts Council England spends £7 per head across Lancashire's 1.5 million residents, compared to £35 in Liverpool and £38 in Manchester
- **Under-leveraged connections to larger NPOS:** While there is some touring and partnership work, the county as a whole does not benefit from proximity to larger scale more (relatively) generously funded NPOS across the country.

- **Lack of a coherent Lancashire story:** Historic changes to the county's shape, the sheer number of councils and unitaries, coupled with its diversity, have made crafting a credible, external facing cultural identity difficult. There has been some good progress here at a local level – e.g. via the 'LeftCoast' Creative People and Places programme in Blackpool and the Wyre, Festival of Making in Blackburn and the Lancaster Story. But these narratives need to be better connected and an overarching Lancashire story developed.
- **Underplayed strengths:** The strengths in academic research, advanced manufacturing, science and technology are not as connected to Culture and creative industries as they could be.
- **Creative industries not visible enough:** While they are growing, there is a lag in providing the types of co-working and collaborative space which could provide visibility and help supercharge the growth of the sector and ensure it continues to thrive alongside those in the bigger cities.

3.3 Cultural Opportunities in Lancashire

- **Fit for Purpose infrastructure:** A set of projects planned or in the pipeline which revitalise existing assets or provide state of the art new spaces.
- **More connectivity:** Better connect up the fragmented cultural ecology, internally and nationally and internationally,

through strengthened networks, collaboration and partnership.

- **Maximise local strengths:** Better connect-up the county's strengths in advanced and modern manufacturing, science, technology and research with its creative strengths to encourage innovation.
- **Capacity and scale:** Alongside the infrastructural improvements, increasing the size and capacity of organisations to deliver high-quality work, reach new audiences and be sustainable over the long term.
- **Higher profile:** Large-scale events (including potentially a UK City of Culture 2025 bid) would increase the profile of the county, bring scale, investment, more partnership working and reach new audiences.

the fast-growing technology and service-based economies of the South East.

- **Skills and confidence diminish:** the cultural and creative sectors need to be promoted as viable and high-quality career opportunities. They also need to be presented as open and relevant to people of all backgrounds, including the more deprived parts of the county.
- **Missed opportunities:** The benefits of HS2 and other infrastructure improvements are not matched through the provision of the experiences and attraction factors that modern towns and cities require to thrive.

3.4 Cultural Threats in Lancashire

- **Big cities dominate:** The cultural and economic dominance of the larger cities in the North West impacts negatively on the small urban centres and towns of Lancashire.
- **Brain drain:** Talented young people, including recent graduates, are drawn away from the county for lifestyle and work reasons.
- **Quality diminishes:** as resources become scarcer with more cuts to come, the county's smaller scale organisations find it increasingly hard to compete against better funded and connected organisations in larger cities.
- **Innovation and productivity gap widens:** The County does not maximise its strengths and continues to fall behind

4. LANCASHIRE CULTURAL INVESTMENT PLAN

For culture in Lancashire to deliver to its potential will require strategic investment in infrastructure, people, capacity, skills, networks and programmes. The county's existing cultural ecology is currently too fragile and fragmented, but through targeted support it has the potential to help Lancashire challenge anywhere in the UK as a creative place to live, work, visit and invest.

For the LEP, leading on economic growth, investment in culture and creativity will significantly contribute to its strategic plans to boost the economy. The Local Industrial Strategy provides the opportunity to develop a 'connected growth' strategy which recognises that true prosperity is built on social, economic and cultural growth. As the DCMS state in their recently published handbook designed to help LEPs integrate culture and creativity into their growth plans

"Economic growth has social and cultural roots: places need to be liveable in order to be productive.

DCMS's contribution to local prosperity is the connectivity we help create, the productive connections between people, businesses, institutions and communities. Connectivity happens because of economic infrastructure, including the right transport links, housing and business facilities. It also happens because of digital, social, creative and cultural

infrastructure."

Just as the LEP's current economic strategy is based on the concept of developing an arc of prosperity that connects up the major towns and surrounding areas, boosting their key strengths and tackling their weaknesses so this Cultural Investment Plan will see culture and creativity supported across the region. We see this investment plan as informing the LIS, but remaining a separate Plan which will be used by the Cultural Investment Board to guide their work. (see below)

It works to deliver on the **five priority outcomes** of this Cultural Strategy:

- **Increased Connectivity**
- **Enhanced Capacity**
- **Improved Crossovers**
- **Bolder Commissioning and Innovative Infrastructure**
- **Compelling Cultural Narratives**

The four priority action areas to deliver these outcomes are:

4.1 Fit for purpose Infrastructure

Over the next three years there is a pipeline of planned and potential infrastructure works which could be transformative to culture and the creative industries. Projects which will support more resilient and sustainable sectors as well as supporting regeneration revitalisation of urban centres, boosting the visitor economy. They include:

Short term (1-3 years)

- ⇒ **New Museum in Blackpool** which has received £4 million in funding from the legacy fund for the great exhibition of the North. This museum and visitor attraction will for the first time tell Blackpool's extraordinary history through participatory immersive and inclusive artefacts, film, music and performance.
- ⇒ **The re-imagining of the Harris** – an ambitious £10.7 million project to make one of the finest museum, library and gallery buildings in the UK more accessible and more suited to the needs of contemporary audiences and able to play an even bigger role as a hub at the heart of Preston.
- ⇒ **The development of a new arts and creative village in Lancaster** – enabling the co-location of different types of organisation and business and facilitating collaboration and innovation as a dynamic new hub
- ⇒ **The refurbishment of The Cotton Exchange in Blackburn** which would enable this unique, historical reminder of the Cotton Age, to operate as a large-scale space for performance and events as part of the continued development of the town centre. This is even more important and needed following the devastating fire at Bureau Arts.

Locus Music venue in Burnley. a purpose-built flexible space for live performances and shows which can accommodate audiences of up to 2,500. The design will also allow for a wide range of activities to take place, from modern live music, classical orchestra, contemporary dance, theatre and art/gallery exhibition and installation space. Championed by AMS Neve which has

consistently developed cutting-edge digital innovation to the music industry. It will extend their acclaimed University partnership work to communities in east Lancashire and allow local talent access to advanced equipment.

Medium (4-7 Years)

- ⇒ **Linear Park** proposal to create a park that transforms canal side assets for cultural and artistic purposes, creating a sense of place to attract, nurture and retain highly skilled residents, students and visitors, starting in Blackburn and ending in Pendle. This is an innovative and ambitious project which can provide transformational cultural infrastructure and experiences in some of the most deprived wards in the county and country. Inspired by large-scale cultural interventions in industrial regions such as Emscher Park³² in Germany's Ruhr Valley and metropolitan exemplars such as the High Line in New York³³; the Linear Park is an ambitious and wide-reaching culture-led regeneration project which will link together communities close to the Leeds / Liverpool Canal with a mix of physical renewal, programming and engagement which collectively will provide a major new cultural attraction for the north of England. It will also help drive housing renewal, improved transport infrastructure, and a set of environmental and social improvements.

Long term (8+)

- ⇒ **Eden Project North**, an ambitious £70 million development in Morecombe which has already received feasibility funding and would provide a year-round visitor attraction as well as

³² https://en.wikipedia.org/wiki/Internationale_Bauausstellung_Emscher_Park

³³ <https://www.thehighline.org/>

boost to the local economy in the same way the original Eden project has successfully delivered in Cornwall.

- ⇒ **HS2** – With Preston becoming an HS2 station, cultural investment will help ensure that the increased role and opportunities for the City as a hub are realised.

4.2. Scaling up events and festivals

Connecting up the county's cultural offer, increasing its reach and visibility, boosting the visitor economy and bringing the benefits that only large, open festivals and events can bring is a priority. There are a series of initiatives that the LEP could support which will deliver this.

Short term (1-3 years)

- ⇒ **Developing a new compelling narrative** – that connects up events and activities and describes the **county in** a way which makes it more legible and less fragmented for residents, visitors and businesses boosting inward investment, tourism and audiences.
- ⇒ **The major nationwide festival of creativity and innovation** planned for 2022 and backed by £120 million of government funding could provide a way of supercharging existing festivals and events, enabling them to increase their reach and quality across the county. As more announcements are made it will be a priority to ensure that the County is as geared up as possible to maximise the opportunity.
- ⇒ **British textile Biennial** – Supporting the growth of this major new festival from SuperSlowWay which throws a

spotlight on the nation's creation, innovation and expression in textiles against the backdrop of the impressive infrastructure of the cotton industry in Pennine Lancashire

Medium (4-7)

- ⇒ **A county-wide bid for UK City of Culture** in 2022 . Assuming that the scheme continues, developing a bid for the county as a whole or a geographically logical portion or place, would bring benefits such as raising the profile of the county, increasing interest from the private sector, building new partnerships, and catalysing growth in the creative economy. This is regardless of whether the bid 'wins': the process can also prove impactful in delivering step change to the position and performance of the cultural sector.
- ⇒ **Creative People and Places**: Preston is eligible for next round of Creative People and Places (CPP), the Arts Council England funded scheme that supports partnerships to develop culture in areas with historically low levels of cultural engagement. It is pushing ahead with a plan to submit a bid which would extend Super Slow Way into the area. As experienced in Burnley and Blackpool, CPP can have a transformational impact on the role, capacity and confidence of the cultural sector.

4.3 Supporting convergence

A programme of activity that connects up the County's strengths in research, advanced manufacturing, science and technology with its growing creative strengths.

Short term (1-3 years)

- ⇒ **Support the National Festival of Making** to scale-up its ability to deliver innovation and industrial change throughout

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the year - via programmes such as Art in Manufacturing. It will be able to grow its role as a development agency and catalyst, really driving innovation in art and industry through larger scale projects connected to research. There is much to build from here, especially with the recent commitment from Arts Council England that it can support the next two years of development for the Festival. This will enable the Festival to connect with the Creative People and Places programmes and build capacity toward a bid to be an Arts Council England National Portfolio Organisation.

Medium (3-7 years)

- ⇒ **A collaborative R&D hub and platform:** to drive innovation and growth in knowledge-intensive sectors across the creative, cultural, science and tech areas. This type of hybrid R&D and production lab is similar to the Pervasive Media Studio in Bristol - a hub and catalyst for innovation which takes the core strengths of the local economy and invests in their convergence to drive innovation. This would have culture to its heart – with a public-facing programme and an active role for arts and cultural practitioners to explore new technologies and support impact-facing innovation.

Long term (8+)

- ⇒ **Cultural production to the heart of the tourism offer:** a set of facilities and programmes which encourage active participation from audiences in making new culture – e.g. a writers' centre; a gaming hub; a commissioning programme for culture and social technology to attend to global sustainable development goals.

A programme of activity that boost skills, sustainability and resilience across culture and the creative industries.

Short term (1-3 years)

- ⇒ **Creative Enterprise Support:** alongside University partners broaden and increase capacity of existing enterprise support programmes (e.g. Lancashire Forum Creative, the Creative Enterprise Toolkit and Creative Step programme), connecting up networks to reach more organisations and creative practitioners across Lancashire. This needs to include support for AI and VR technology.
- ⇒ **Cultural and Creative Skills:** Work with Lancashire Skills Hub to develop a tailored skills and capacity-building programme for a new cultural workforce. This should adopt and adapt the 4 priorities of the Lancashire Skills and Employment Strategic Framework 2016-2021: Inspire (to generate a pipeline of talent to the cultural and creative sectors and to give credibility to work in this sector); Recruit (work with the cultural and creative sector to recruit from the local talent pool); Upskill (build the technical and management capacity of the cultural sector); and Influence (working with the cultural and creative sector to build support for long-term investment).

Medium (4-7 years)

- ⇒ **Strategic commissioning in health,** social care and town centre renewal: hard-wiring cultural delivery into core social and economic development agendas. A stronger cultural sector can, for example, help diversify the offer of town centres in a time of crisis for high streets. Options here include a cultural business improvement district model and a culture for health and wellbeing fund to support social prescribing.

4.4 Building Capacity

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Long term (8+)

- ⇒ **Education and culture infrastructure.** The higher education sector in Lancashire can help shape a new generation of cultural infrastructure by first prototyping and then developing new facilities and spaces for research and experimentation – e.g. in virtual and augmented reality; artificial intelligence; and contemporary crafts.
- ⇒ **Film and TV:** The success of Screen Yorkshire in promoting the area as a home for film and tv production, shows how successful strong regional initiatives can be. With partners including the BFI, there is scope for Lancashire to develop its own model based on the strength of its creative community, its heritage and environmental offer.

5. PARTNERSHIP AND DELIVERY

The Cultural Investment Framework sets out the type of ambitious projects which will see the five outcomes delivered over the next decade. Key to ensuring that they are achieved will be the establishment of an active, strategic Culture Investment Board, made up of representatives of culture, business, higher education, health and the wider public sector.

The Cultural Investment Board's primary goal will be to **maximise the role that culture can play in the economic growth of Lancashire**. While the Local Industrial Strategy will be the overall driving force, the role of the Culture Board will be ensuring that as it is rolled out that culture and creativity's role is maximised. The Cultural Investment Framework will become the focus for a strategic conversation with national bodies on the County's portfolio of exciting cultural and creative projects. It will be the Board's role to help ensure that coalitions and partnerships are established to deliver projects where required and to help attract new forms of public and private investment.

This proposal builds on the work done in 2017 around the establishment of a Lancashire Cultural Partnership³⁴. This set out the case for a cultural board that was broad in make-up and ambition:

"The primary focus for a Lancashire Cultural Partnership should be;

'To provide a mechanism to facilitate investment' and to 'elevate the direction of travel and strengthen the credibility of the sector.'

A Lancashire Cultural Partnership should have the following three core objectives:

³⁴ Anthony Preston, A Feasibility Report into A Lancashire cultural partnership

Re-made: a cultural strategy for Lancashire

- *Holding a collective vision and cohesive voice for culture in Lancashire, which in turn provides leadership and influence and to create the right environment for the sector to realise its potential and to arrive at priorities*
- *To unlock major investment aligned to a few big ambitions*
- *To improve the research and intelligence base and to be better connected across the cultural sector*

It suggested five themes where the partnership should have a role: Workforce development, organisational development, communications, stabilisation of the sector and marketing the cultural offer. It proposed a board to be made up of a broad range of stakeholders from across culture, business and local government. This looks like a sound basis for the board and forms part of the basis for our recommendations.

Another important development has been the publication of the Cultural Cities Enquiry³⁵ in early 2019. This contains an ambitious set of recommendations for how cities can boost funding for culture through the establishment of new shared social investment funds, the establishment of city skills strategies, the development of more portfolio approaches to management of cultural assets, and a bigger role for BIDs (alongside a debate on the establishment of a tourism levy to fund culture).

The central recommendation (one backed up by a small ACE/DCMS joint fund) is for cities and towns to establish Cultural Compacts to provide leadership and strategic vision. These Compacts will provide:

“locally determined strategic partnership to create ‘whole place leadership’ for culture. It is designed to create a sustainable local

framework to replicate the impact of a major cultural programme. It will significantly raise levels of ambition and align investment and resources toward shared priorities.”

They will provide a platform for dialogue and negotiation with government and funding agencies – essentially helping develop a ‘city deal’ approach for culture. The Compact will be made up of representatives not just from culture but also from NHS Trusts, schools, universities, Business Improvement Districts, businesses, developers and more.

We are aware that Preston is in the process of deciding whether it will develop its own model of a compact, while it seems likely Blackpool will consider developing one as part of its ambitious plans. For Lancashire the question is how best to support these individual initiatives while at the same time delivering the benefits that partnership working brings across the County. The establishment of the Board would do just that.

The Board will be made of representatives drawn from across the cultural ecology of Lancashire reflecting its depth and breadth and the geographic spread of assets and programmes. As so much of its focus will be the interaction between culture and place, it is vital that the Board includes representatives of the public and private sector whose partnership and support will play such an important part in delivering the framework. It will also be important to make links to the wider wellbeing and health agenda, such as by linking to the work of the Lancaster Health and Innovation Campus.

The Board will provide expert advice to the LEP and Local authorities. It will not be an official decision-making entity, rather it will play an active role as advocate, champion and critical friend in

³⁵ Cultural Cities Enquiry, Enriching UK Cities through Smart Investment in culture

the decision-making process. If county-wide bid for City of Culture 2025 goes ahead the Cultural Investment Board will be the natural overseer of the campaign for selection. This is to ensure culture sits to the heart of the growth agenda and decisions are informed by experts who share a passion for the role of culture in shaping great places.

The LEP will establish a culture sub-committee as a liaison point between the Culture Board and the LEP Board. This sub group will ensure that the Board's work is closely aligned to the work of the LEP and will ensure that the Board's work feeds directly into the LEP's activities at a top level.

The purpose of the Cultural investment Board is to:

1. To develop and implement a plan for the growth of culture and creative industries sectors (Based around the Cultural Investment Framework) across the LEP area to support the aims of the LEP and the delivery of the Local Industrial Strategy?
2. One of its first roles will be to implement an action plan for the first year, setting out short, medium- and long-term goals. This will include a set of KPIs which connect to the ambitions of wider LEP and County strategies.
3. To develop investment cases based on evidence, for consideration by the LEP.
4. To ensure effective alignment between local, LEP and County Council plans for culture and that actions are co-ordinated and undertaken at the appropriate footprint
5. To ensure that strategic planning for culture and creative industries is fully integrated with wider plans for infrastructure, transportation, jobs and skills wellbeing and environment.

6. To provide professional advice and support to the LEP on issues affecting the growth of the culture and the creative industries, including responding to new opportunities and consultation.

6. LANCASHIRE CULTURE RE-MADE

The Cultural Investment Plan sets out the headline approach for delivering step-change in the role and performance of culture in Lancashire as a driver for economic growth. This will require an **ambitious and coordinated programme of interventions which enable the role and value of culture in Lancashire to be re-made.**

Together with our partners we will work on delivering the following outcomes by 2030:

Increased Connectivity: *A better connected cultural and creative sector that sees the main urban areas, smaller towns and rural areas, working collaboratively to build scale, presence and impact. By working together, the diversity of places in Lancashire can more effectively develop a clear offer and role which resonates nationally and internationally for audiences and markets.*

For example, this will be achieved through:

- A shared platform for culture which dovetails with Visit Lancashire and Invest in Lancashire to position culture to the heart of the visitor economy and inward investment story

- A coordinated approach to workforce development, commissioning, programming and communication: so, the cultural portfolio of Lancashire is better understood and is more collaborative and accessible.

Enhanced Capacity: *A stronger, more diverse and sustainable, and an appropriately skilled cultural sector – delivered by scaling up organisations to support the next generation of leaders and innovators. Cultural organisations and infrastructure will be positioned to deliver positive outcomes for economic growth and high-quality places.*

For example, this will be achieved through:

- Universities and the cultural sector developing tailored skills and entrepreneurship activities to build the growth and innovation capacity of the cultural sector.
- New investment in our major cultural gems – such as The Harris and new Museum in Blackpool. These will be catalysts for a re-made cultural offer.
- Support for cross county/regional initiatives such as Light Up the North (LUTN) –the network of Light festivals that Blackpool and Lancaster play a leading role in alongside Leeds, York, Newcastle/Gateshead and Durham

Improved Crossovers: *An international reputation for the strength, depth and ingenuity of our partnerships and collaborations. These will promote convergence and innovation across our strengths in culture, creativity, research, science, technology and manufacturing.*

For example, this will be achieved through:

- Tailored R&D activities to connect culture and the arts to science, technology and manufacturing to establish a rich creative and knowledge ecosystem for Lancashire.
- The rise of cultural champions and private sector partners - investing in new infrastructure and backing their home towns to deliver culture-led growth (e.g. in Lancaster, Burnley, Blackburn and Blackpool)
- Collaborative projects which connect the businesses of Digital Lancashire to key cultural organisations to testbed organisational change and pioneer digital culture

Bolder Commissioning and Innovative Infrastructure:

Be recognised for the strength of Lancashire's connected cultural and creative infrastructure, delivering high quality work to diverse audiences in historic and state of the art buildings and more widely through the communities, businesses and schools.

For example, this will be achieved through:

- Major projects such as the National Festival of Making and a bid to be UK City of Culture in 2025 or 2029
- A network of dynamic creative production hubs in key urban centres – which provide the space, facilities and skills support to enable local talent to develop world class creative and cultural production skills
- New cultural infrastructure to anchor major developments – e.g. for HS2 in Preston

Compelling cultural narratives: *Be recognised nationally and internationally for the distinctiveness of places, people*

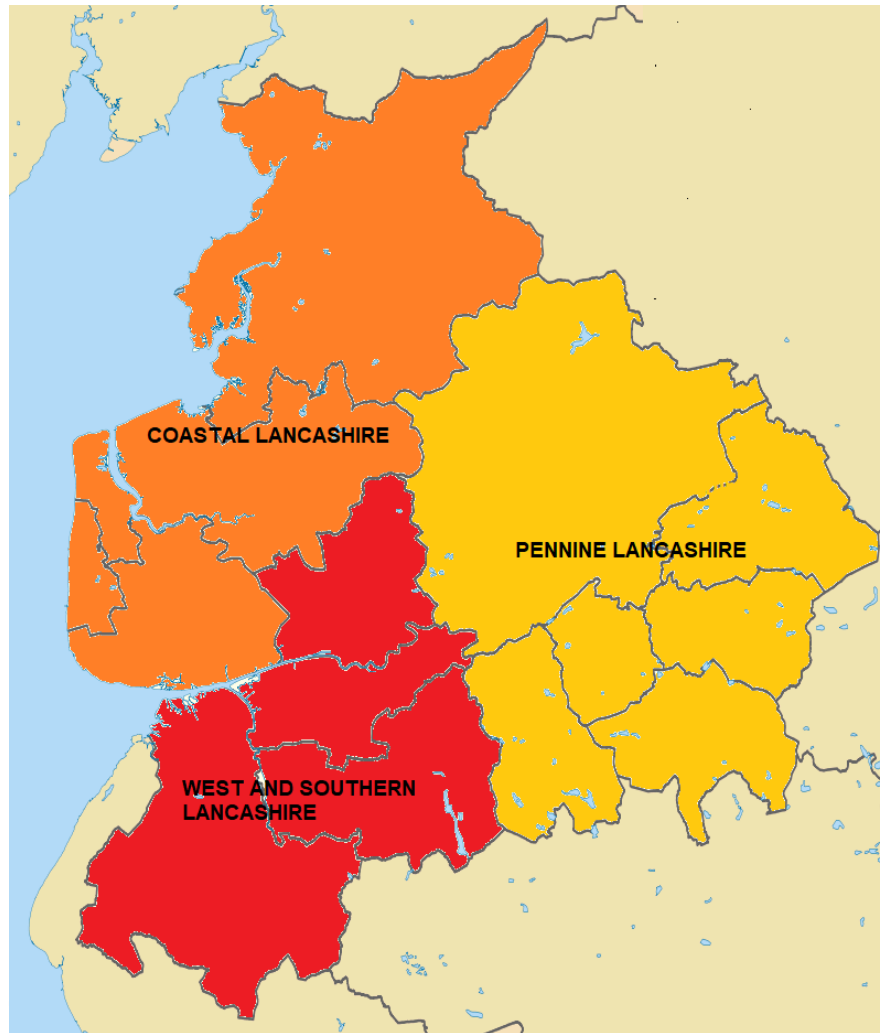
and environment; with the cultural offer and cultural life making Lancashire a highly attractive place for residents, visitors, workers and investors.

For example, this will be achieved by:

- An interactive multi-media campaign to showcase Lancashire's cultural assets to audiences and investors (dovetailing with Visit Lancashire and Invest in Lancashire)
- An internationalisation programme – to build targeted collaborations and promotional activities in priority markets as a way of boosting Lancashire's profile as a place of culture with a history of radicalism and innovation which is ambitiously working to re-make its cultural offer to meet global trends.

Re-made is the first stage in providing 'a big plan' for unlocking the transformative power of culture, in a Lancashire where the full potential of people, place and economic growth are realised together.

Appendix 1- Cultural Assets across Lancashire



Blackburn with Darwen

King George's Hall is three separate venues offering everything from pop to pantomime. It is one of regions premier live entertainment venues.

Blackburn Empire Theatre (formerly Thwaites Empire Theatre) just outside Blackburn town centre has an events calendar with performances from opera, to musicals, comedy, drama and more.

The **Darwen Library Theatre** is a small theatre adding to music, comedy, film, drama on offer in the district, but with a community arts focus too.

Blackburn Museum is home to numerous watercolours and oil paintings, ceramics, large collection of Japanese woodcut prints and the Hart collection of coins, books, medieval manuscripts and prints. It has the only permanent gallery of Indian and Pakistani culture in the North West.

Festival of Making - Taking place over two days in May, with activities throughout the year, the festival takes over the streets of Blackburn with music, markets, street food, art, performance, tours, talks and an eclectic mix of making experiences for people to get involved in. This has significant opportunity to be scaled up as a major festival of making for the UK.

Restricted Forest Festival - house, techno, old skool and more music festival in a woodland setting of Witton Park Blackburn, in September.

Confessional Festival – 10 hours of music and arts held in Holy Trinity, an old disused church in Blackburn, featuring some of the best emerging acts from around the UK, along with high profile artists.

Darwen Live - every May Darwen a 2-day music festival national bands play

Blackburn Rovers Football Club, a major cultural asset and the only club in Lancashire to win the Premier League.

Making Rooms, Blackburn. A hub and platform where creativity, technology and advanced manufacturing come together. It is also a fab lab and space for experimentation and skills.

Prism Contemporary Art Gallery, Blackburn. A former vintage clothing shop transformed into a new pop-up art gallery for Blackburn College staff and students on the BA (Hons) Fine Art Course.

Over Darwen House – a co-working space for creatives and other knowledge-intensive businesses.

Turton Tower - a manor house in Chapelton in North Turton, Borough of Blackburn with Darwen, Lancashire, England. It is a scheduled ancient monument and a grade I listed building

Darwen Tower – An 86 FT tall Tower build to commemorate the Diamond Jubilee of Queen Victoria in 1898 lying on the West Pennine Moors overlooking Darwen

Bureau Arts Centre - a vibrant new Arts Centre in the heart of Blackburn, providing versatile space for arts activities, theatre, music, cultural events and community participation.

Blackburn Cathedral – Finally completed and consecrated in 1977 one of the newest cathedrals in the UK, it is at the centre of the ambitious renewal of Blackburn Cathedral Quarter. The Cathedral Court part of the development, adjoining Blackburn Cathedral, consists of new cathedral offices, library, refectory, housing, underground car park and enclosed cloister garden.

Burnley

Super Slow Way is an arts programme in Pennine Lancashire shaped by local communities working alongside a wide range of local, national and international artists and producer. One of 21 Arts Council England Creative people and Places programmes and one of two in Lancashire. LeftCoast Blackpool and Wyre the other.

Burnley Youth Theatre (ACE NPO) Burnley Youth Theatre is based at purpose-built venue in Burnley, including a 158-seat theatre, 3 studio spaces and 2 outdoor spaces. They produce and programme a wide range of creative activities, productions and events engaging children, young people and families. ~~We operate from a~~

Queen Street Mill Textiles Museum, the last surviving 19th century steam powered weaving mill.

Townley Art Gallery and Hall – 14th century Grade I listed with period rooms decorated with oil paintings and sculptures covering several centuries of life at the hall.

Burnley Canal Festival, August Bank Holiday weekend, attended by more than 12,000 people in 2017 celebrating canal heritage through performance, music and fun.

The British Textiles Biennial 2019 follows a Super Slow Way (Fabrication) pilot in 2017. Artists, designers and makers with explore the politics of cloth in performances, artworks and events across Pennine Lancashire (i.e. not just Burnley); from Blackburn Cotton Exchange to Briarfield Mill in Pendle, from Mr. Getty's Experiment Shed in Accrington to the world-class textile collection at Gawthorpe Hall in Burnley. It will also expand into Preston.

Mid-Pennine Arts (also in other parts of central and east Lancashire – helping to re-imagine places via Panopticon art Installations and current collaborations with the local authority

Burnley Football Club – a cultural asset in its own right and currently the county's only Premier League club. It is therefore a beacon for the county.

Hyndburn

Haworth Art Gallery, Accrington is an Edwardian house set in a park with internationally renowned collection of Tiffany Glass the largest in public hands outside America.

Accrington Food and Drinks Festival 14,000 people attend the June event, to sample food and drinks, watch cookery demonstrations and get involved in activities.

Accrington Stanley Football Club – a relatively new club with a historic name and vital cultural asset for the town.

The Civic Arts Centre & Theatre is a cultural venue for drama, dance and all performing arts - right in the heart of Hyndburn.

Pennine Film Festival (Accrington & Rosendale College) - an annual festival started in 2006 focusing on independent filmmaking, offering local and national premieres, hosting masterclasses, workshops and discussions for filmmakers from the enthusiast to the professional.

Accrington Library – an important events & exhibition space.

Pendle

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In-Situ (ACE NPO), has new a space **The Garage**, in Brierfield a redeveloped, eco-friendly building with a project and event space, pop up cinema, art library and artist accommodation.

The **ACE Centre**, Nelson - a purpose-built centre with a mix of community facilities, arts, film, music and theatre spaces and programmes.

The Muni is an Edwardian theatre in Colne town centre, with a year-round programme of, from live music, comedians, dance nights and an annual pantomime.

Pendle Heritage Centre - 18th Century Walled Garden, Cruck Frame Barn, Pendle Arts Gallery and a Conference Centre.

The week-long **Pendle Walking festival** in August is one of the biggest events of its kind in the country - from competitive walks to family trails.

2019 will be the 30th anniversary of the **Great British Rhythm and Blues Festival** – a 3-day festival at the end of August in venues across Colne.

Mid Pennine Arts leading the four-year project *Pendle Radicals*, from spring 2018, exploring Pendle Hill's heritage of radical thinkers and non-conformists,

ARTPAD is an art studio in Colne, providing a range of art and craft activities for both children and adults.

Nelson Food Festival in September and **Colne Food Festival** in December.

Ribble

The Grand, Clitheroe. A creative community venue with music, art and performance classes and programme of live music, comedy, spoken word and film.

The **Ribble Valley Sculpture Trail** runs from Brungerley Bridge to Crosshill Quarry along part of the Ribble Way.

Beat-Herder Festival, Sawley, weekend mid-July. From a small festival in 2006 to an annual event with 16 music areas, 40 stalls, 14 bars, a fairground and more.

Ribble Valley Jazz Festival, May Day Bank Holiday weekend, showcases the very of Jazz in all its genres, bringing together performers from across the world to the pubs, clubs, restaurants and venues in and around Clitheroe.

The first **Ribble Valley Literary Festival** was held in 2018 at the Northcote hotel in Langho, with advisors from Oxford Literary Festival and Blenheim Palace Festival of Literature supporting the production and programming.

Platform Gallery and craft shop, Clitheroe – showcasing work in art, design and crafts.

Clitheroe Food Festival – an annual showcase of artisanal produce.

Cloudspotting – Music & Arts Festival in Gisbern Forest – a small and high-quality music and art festival.

Rossendale

Horse and Bamboo (ACE NPO), is a puppet and mask theatre company serving the community of Pennine Lancashire as well as touring productions for adults and children nationally and internationally. **The Boo** theatre, based in Rossendale, hosts puppetry films and other performances.

The **Rossendale 60's Festival** is Rossendale Valley wide and includes events in Rawtenstall, Bacup, Haslingden and Whitworth.

'**Halo**', is an 18m-diameter steel on Top o' Slate, an old quarry and former landfill site is one of the Panopticon sculptures part of the **REMADE in**

Lancashire programme, a partnership between Groundwork Pennine Lancashire, Mid Pennine Arts and local authorities.

Helmshore Textile Mills and Museum – with the museum recently re-opened for 3 days a week.

Culture in Central Lancashire

Chorley

Astley Hall Museum and art gallery with cultural programme of events.

Chorley Little Theatre – volunteer run, 236 seat theatre and arts venue in the centre of town.

Chorley Live – 2018 the 6th year of the annual live entertainment weekend across Chorley.

What's Your Story Chorley, annual festival of words, fun, fiction and fairy tales celebrating the spoken and written word. 2018 its 5th year.

Walled Garden at Astley Hall is a dedicated event space which presents a programme of cultural, sporting and community events throughout the year.

Preston

The Harris, Museum, Art Gallery and Library (ACE NPO). 1000 people a day enter the Grade I listed building. About to embark on a £10.7 Million Project to make it the UK's first blended library, museum and gallery.

Guild Hall & Charter Theatre, 716-seater Charter Theatre and 2,034-seater Grand Hall, offering an extensive programme of classical and contemporary music, dance, drama, musicals comedy and spoken work. Operated by the Rigby Group.

Birley Studios- artist led studios and project space.

In Certain Places, A UCLAN led project exploring how cultural place-making shapes the fortunes of cities and regions, through ongoing artistic interventions.

They Eat Culture - programming, commissioning and producing quality arts & cultural work, into the cultural life of Preston and Lancashire.

Preston Guild, dating back to 1179, every 20 years, renewal of the Guild Court, with procession and celebration events.

Lancashire Encounters, annual festival celebrating the breadth of the Lancashire's diverse cultural offer with high quality and high-profile arts.

Preston Caribbean Carnival, the largest and longest running cultural celebration in Preston outside of the Preston Guild, attracting tens of thousands of visitors each year.

Preston North End football club, a major cultural asset in its own right – with a rich footballing heritage and strong provider of community and cultural value.

South Ribble

South Ribble Museum and Exhibition Centre – small museum in old school house in Leyland.

Samlesbury Hall – 14th century manor house and gardens with gallery and events.

Worden Arts and Crafts Centre & Marsden Theatre, situated in Worden Park, Leyland.

Penwortham's live music festival, 100 acts, 21 venues.

Longton Live, music and arts festival, 18 venues across the village over a weekend in mid-July each year.

Leyland Festival including the parade, stage, sports, games, stalls, music, funfair, food, drink.

Brockholes, a vital nature reserve close to Preston.

Culture in West Lancashire

Ormskirk

Chapel Gallery arts centre, in Ormskirk combining internationally regarded artists exhibitions with, contemporary art and craft from across the UK, and supporting local artists with career development.

Lancashire Open Exhibition at the Chapel Gallery – July-September, over 200 artworks by artists from across the UK.

A Festival of Tales – works inspired by local heritage by six highly regarded artists, three published authors and one talented theatrical company, over festive season 2018 in Ormskirk.

Blackpool

Blackpool Tower, Ballroom and Circus

Dating from 1894 and modelled on the Eiffel Tower, the Tower and its entertainment complex were an instant success and are known to audiences across the globe thanks to Strictly Come Dancing

The Winter Gardens

One of Europe's biggest entertainment complexes with numerous venues with capacity from 100 to 7,000. It places host to an eclectic mix of music, shows, conferences exhibitions and more.

Grand Theatre An historic 1,100 theatre designed by Frank Matcham, now an arts council NPO, which puts on a range of contemporary productions as well as enjoying a long-lasting partnership with the RSC

The three Piers (North, Central and South) with the oldest the north dating back to 1863 led the way in offering working-class entertainment during wakes weeks and still today provide entertainment ranging from a big wheel to live shows.

Grundy Art Gallery, one of the most significant contemporary art galleries and an Arts Council National Portfolio Organisation, recent exhibitions have included acclaimed artists including Martin Creed, Brian Griffiths, David Hockney, Pierre Huyghe, Heather Phillipson, Susan Philipsz and Matt Stokes.

Blackpool Illuminations attracting 3.5 million visitors over 66 nights in September and October each year.

Lightpool Festival, performance and music in the town centre and on the comedy Carpet, supported in 2018 by the Coastal Communities Fund and Blackpool Council.

Blackpool Winter Dance Festival – young people's dance development festival held each February in half term.

Blackpool Festival, over 100 music acts and DJ sets, over the July weekend on the Promenade in front of the Tower.

Blackpool Football Club, a cultural asset with a strong heritage and recent history in the Premier League. Recent change of ownership has reignited a positive relationship with the fans.

AMUSEUM: New Museum in Blackpool which has received £4 million in funding from the legacy fund for the great exhibition of the North. This museum and visitor attraction will for the first time tell Blackpool's extraordinary history through participatory immersive and inclusive artefacts, film, music and performance.

Fylde

Lowther Pavillion, a theatre and community arts space with programme of music, theatre spoken word comedy and more, at the heart of Lowther Gardens in Lytham St Annes.

Fylde Gallery, built by the Booth family, as part of their new store in 2007, to display the Lytham St Anne's art collection.

Lytham Festival, five nights of live Music on Lytham Green.

Lytham St Ann's Festival of performing arts, part of the British & International Federation of Festivals for Music, Dance and Speech.

Lytham Hall, 18th Century Georgian House and Parkland.

Wyre

1930s art deco **Marine Hall**, on the seafront in Fleetwood, has a year-round line up of live music, comedy, children's shows and entertainment in the hall and the outdoor performance space.

Fleetwood Museum of local history. The only accredited museum on the Fylde Coast.

Thornton Little Theatre, in Thornton Cleveleys, hosts a range of events from touring theatre performances to plays by local amateur dramatic companies, live acoustic gigs and family shows.

Fleetwood Music and Arts Festival, running for over 60 years, sees amateur vocalists, choirs and instrumentalists, verse speakers, and actors perform and compete for awards.

Fleetwood Folk and Blues Festival, first weekend in September, in venues across Fleetwood.

Fleetwood Transport Festival with over 200 vintage vehicles on display on The Esplanade in Fleetwood, each year accompanied by performances and entertainment from Spareparts Arts.

Thornton Little Theatre, in Thornton Cleveleys, hosts a range of events from touring theatre performances to plays by local amateur dramatic companies, live acoustic gigs and family shows.

Lancaster

Lancaster has four Arts Council England NPOs:

Lancaster Arts is Lancaster University award-winning arts provider, supporting cultural and artistic engagement at the highest level through a programme of internationally renowned contemporary theatre, dance, visual art and classical music, in the campus-based performance spaces - the **Nuffield Theatre, the Peter Scott Gallery and the Great Hall**.

Ludus Dance – leading dance development organisation.

More Music - a music education charity based in the West End of Morecambe.

The Dukes Playhouse theatre in a converted church in Lancaster is a much-praised repertory theatre and cinema. It is Lancashire's only professional producing theatre, producing five shows a year including an outdoor Promenade performance and a Christmas family show.

Other key cultural assets include:

Vintage by The Sea Festival, Morecombe in September - music and dance, fashion and beauty, art and design, of every vintage from the

1920s to the 1980s, with 'happenings' around every corner from classic cars, to donkey rides and pop-up performances.

Morecombe Carnival, mid-August week, a parade along the promenade and music at Bay Arena, a Family fun Zone, circus tent, science and enterprise zone and more on The Midland Hotel lawn.

Lancaster Festival, 10 days in July celebrating art music and community. From Lancaster Orchestra concerts through brass bands and tribute bands, to art exhibitions and workshops, guided art walks.

West End Winter Lantern and Music Festival, in Alexandra Park Morecambe, late November, including a lantern procession and creative craft market.

Sport

Other important Cultural assets across Lancashire

'Heritage' businesses

Lancashire is home to a number of famous brands and businesses which very much connect with it culturally and are important to how it sees itself often relating back to its industrial Heritage. These include Graham & Brown Wallpaper, Standfast and Barracks textiles and fabrics.

Country Shows

Lancashire is home to over 12 shows which are members of the North West federation of Show Societies including Great Harwood Agricultural show to Fylde Vintage and farm Show.

Appendix 2. List of Consultees

To Follow

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Lancashire Enterprise Partnership Limited

Private and Confidential: NO

Date: Tuesday, 25 June 2019

Lancashire Enterprise Partnership Limited - Director Defined Term Limits

**Report Author: Andrew Pettinger, Interim LEP Chief Executive Officer,
andrew.pettinger@lancashirelep.co.uk**

Executive Summary

The National Local Growth Assurance Framework published by Government in January 2019 and active from April 2019 states that all Local Enterprise Partnerships (LEPs) should have defined term limits for the Chair and Deputy Chair.

This report proposes to extend the defined term limits to other Lancashire Enterprise Partnership Board Directors so to provide a consistent approach. Such an approach will enable the necessary turnover on the LEP board that is required to enable it to move towards greater equality around gender and diversity and ensure its ideas remains fresh and relevant.

Recommendation

The Lancashire Enterprise Partnership Board is asked to approve the retirement of Board members as outlined in the main body of the report.

Background and Advice

The Lancashire Enterprise Partnership has adopted within its Local Assurance Framework the national guidance that the Chair and Deputy Chair of the Lancashire Enterprise Partnership shall serve a maximum defined term of three years with the option to extend for a further three years in exceptional circumstances.

The Lancashire Enterprise Partnership is made up of a mixture of public and private sector directors and is private sector led. There are currently 5 directors specifically from local authorities with 14 (soon to be 15) directors from the private, voluntary and none Local Government public sector (such as Education sector).

Local Authority directors are from the three upper tier Lancashire authorities – Lancashire County Council, Blackpool Council and Blackburn with Darwen Borough Council with the District Leaders Group having the power to appoint a maximum of two directors from their number of 12 district authorities.



It is important to recognise that a democratic selection process already exists for the 5 local authority director appointments made from council's in that they are subject to local elections with the electorate determining the respective administrations of the public sector authorities. Given this existing democratic process, it is not proposed to apply the three plus three term to the local authority directors, given this will be at odds with the electorate voting for whom they wish to represent them in local government.

It is proposed that for all other none democratically elected directors that the same defined term limit of three years with an optional extension of three years is applied to all private sector directors. In addition to which, and only in exceptional circumstances, this could be further extended.

Introducing defined terms of office for all none democratically elected directors, offers the opportunity for the Board to continue to make progress towards a Board that is reflective of the local business community (including geographies, gender and protected characteristics) with it noted in the local and national guidance that all Local Enterprise Partnerships must have at least one third of the Board must be women by 2020 and there should be equal representation by 2023.

At present, of the 19 total directors five are women so falls slightly short of the target that must be met by 2020 and is significantly short of the equal representation target by 2023. Such an approach would also enable the LEP to continually refresh its membership, ideas and approach. This approach would also allow the LEP to continually refresh the board to ensure it is reflective of new ideas and thinking.

List of Background Papers

Paper	Date	Contact/Tel
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None		
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Reason for inclusion in Part II, if appropriate		
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N/A		
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Lancashire Enterprise Partnership Limited

Private and Confidential: NO

Date: Tuesday, 25 June 2019

Lancashire Enterprise Partnership Limited - Governance and Committees Report

**Report Author: Andy Milroy, Senior Democratic Services Officer,
Lancashire County Council, Tel: 01772 530354, andy.milroy@lancashire.gov.uk**

Executive Summary

This report extracts the key items considered by each of the Lancashire Enterprise Partnership Board Committees at their recent meetings, and where applicable, and if not considered elsewhere on the Board's main agenda, contains decisions referred to the Board by its Committees for approval.

Recommendation

The Lancashire Enterprise Partnership Board is asked to note the updates provided in this report in relation to Governance and the Committees of the Lancashire Enterprise Partnership.

Background and Advice

This report provides an update on governance issues and meetings of committees of the LEP since the last ordinary meeting on 1 May 2019. This is in accordance with the refreshed Assurance Framework dated June 2019, publicly available on the Lancashire Enterprise Partnership website:

<https://lancashirelep.co.uk/wp-content/uploads/2019/06/LEP-Assurance-Framework-June-2019.pdf>

Governance Updates

It is for noting that following the recent Lancashire council elections that there has been a change in the two Public Sector Directors nominated by the Lancashire District Leaders Group as follows:

Previous District Public Sector Directors

- Councillor Mark Townsend (Burnley Borough Council)
- Councillor Margaret Smith (South Ribble Borough Council)



New District Public Sector Directors

- Councillor Alyson Barnes (Rossendale Borough Council)
- Councillor Stephen Atkinson (Ribbles Valley Borough Council)

The other three Public Sector Directors remain unchanged.

New LEP Committee Members

It is also for noting that following the recent Lancashire council elections that there is a new Leader of South Ribbles Borough Council, Councillor Paul Foster, who has automatically become a new member of the City Deal Executive Committee replacing Councillor Margaret Smith.

Richard Kenny, Interim Director of Economic Development and Planning has replaced Sue Procter as the Lancashire County Council nominated member of the Growth Deal Management Board.

Current LEP Committee Vacancies

A number of LEP Committee vacancies remain as follows:

- Enterprise Zone Governance Committee Member
- Performance Committee – 2 x vacancies for a Chairman and an additional Committee Member
- Skills and Employment Advisory Panel – Voluntary and Community Faith Sector nominee (interviews currently taking place to fill this role) and the Lancashire Leader's Lead Member for Skills and Employment – Lancashire Leader's Group have been requested to consider this vacancy.

It is anticipated that the remaining vacancies will be filled once the new LEP Chairman is formally in post.

Updates from recent LEP Committee Meetings

1. Transport for Lancashire Committee

The Transport for Lancashire Committee met on 5 June 2019 and considered / approved the following:

- **Preston Western Distributor Funding Application** – The Committee received a report on the independent assurance of the Strategic Outline Business Case for this funding application. The Committee agreed to recommend that the LEP grant the scheme a maximum of £58,000m Growth Deal Funding, subject to final approval from the Secretary of State and Lancashire County Council providing an update on the projected final target cost in advance of final sign-off.



- **Preston Rail Station HS2 Hub – Assessment of Wider Economic Benefits**
– A presentation was made to the Committee by the appointed consultants summarising the draft report and highlighting the potential extent of benefits if a HS2 Hub station was to be delivered at Preston and how these benefits could extend beyond Preston and throughout Lancashire with the Committee noting the report.

Full agendas and minutes for Transport for Lancashire meetings can be accessed here: <http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeId=956>

2. City Deal Executive and Stewardship Board

The Combined City Deal Executive and Stewardship Board has not met since the last ordinary meeting of the Lancashire Enterprise Partnership Board held on 1 May 2019.

Full agendas and minutes for the Combined City Deal meetings can be accessed here: <http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1072>

3. Growth Deal Management Board

The Growth Deal Management Board met on 5 June 2019 and considered / approved the following:

- **Allocation of Growth Deal Funding** – External consultants presented a report containing an independent ranking process and approved the prioritisation of the projects on the basis of the best ranked projects identified and that the LEP be recommended at its meeting scheduled for 25 June 2019 to approve the prioritisation of the projects and invite those projects to develop full business cases.
- **Growth Deal Finance Report** – The Growth Deal Management Board received a report containing the financial position of the Growth Deal as at the end of May 2019 and noted the report including the spend profile to date along with the future spend forecast.
- **Growth Deal – Programme and Project Update Report** – This report provided an update on the M55 to St Anne's Link Road project, Preston Western Distributor and Change Request for Burnley Vision Park project. The Board agreed to recommend to the LEP Board to withdrawn Growth Deal funding to the M55 St Annes Link Road project and approved the Change Request submitted for the Burnley Vision Park project.
- **Northlight – Mini Business Case** – This report provided an 'Additional Residential Provision' Mini Business Case for the Northlight project which the Board approved should proceed in accordance with the Mini Business Case.



The reports and minutes for Growth Deal Management Board meetings can be accessed here:

<http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1218>

4. Enterprise Zone Governance Committee

The Enterprise Zone Governance Committee met on 3 June 2019 and considered / approved the following:

- **Blackpool Airport Enterprise Zone – update report** – The Committee received a report which provided an update on progress in the development of the Blackpool Airport Enterprise Zone including current accommodation, access and link roads, proposals for existing and future units and marketing with the Committee noting the report.
- **Hillhouse Technology Enterprise Zone – update report** – The Committee received a report which provided an update on the Hillhouse Masterplan which it noted an approved for submission to the Ministry of Housing, Communities and Local Government. In addition the Committee received updates on Marketing, the Implementation Plan, Risk Register and Forthcoming Activity.
- **Samlesbury Aerospace and Warton Aviation Enterprise Zones – update report** – The Committee received a report which provided an update on both Enterprise Zones and specifically the progress of the Advanced Manufacturing Research Centre and Asset Management Facility at Samlesbury along with updates on the Masterplan relating to Wharton.

Full agendas and minutes for the Enterprise Zone Governance Committee meetings can be accessed here:

<http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1171>

5. Lancashire Skills and Employment Advisory Panel

The Lancashire Skills and Employment Advisory Panel met on 12 June 2019 and considered / approved the following:

- **Update from the Lancashire Skills and Employment Hub** – The Panel received an update report on activities and approved the Apprenticeship Action Plan as presented.
- **European Social Funds – Education and Skills Funding Agency Opt-In Projects Development Plan** – The Panel approved the Development Plans for the ESFA Opt-In projects Skills Support for the Workforce, Skills Support for the Unemployed and Not in Education, Employment or Training as presented.



- **Lancashire Skills Pledge** – The Panel received a presentation on the Lancashire Skills Pledge which was noted.
- **Digital Skills Research** – The Panel received a presentation on Digital Skills Research which was noted.

Full agendas and minutes for the Lancashire Skills and Employment Advisory Board meetings can be accessed here:

<http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1011>

6. Performance Committee

The Performance Committee has not met since the last ordinary meeting of the Lancashire Enterprise Partnership Board held on 11 May 2019.

Full agendas and minutes for the Performance Committee meetings can be accessed here: <http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1216>

7. Business Support Management Board

The Business Support Management Board met on 9 May 2019 and considered / approved the following:

- **Growth Hub Annual Report** – The Board received an Annual Growth Hub report which was noted, in addition the Board endorsed the draft Annual Report's submission to BEIS and the Communities and Local Growth Team, subject to the comments made by the Board being incorporated into the final version and noted the case study framework prepared by UCLan.
- **Access to Finance Programme update** – The Board received a presentation which updated on the Access to Finance programme, including service objectives and an overview of the current market and programme performance outputs and targets. It was agreed to circulate the presentation electronically to Board members.
- **Local Industrial Strategy – Progress Update** – The Board noted progress made on the Lancashire Local Industrial Strategy, approved the proposal to use March 2020 as the deadline date for production of the Strategy, using the extra time for enhanced consultation, provided comments on the drafts and agreed to do so as the Strategy develops and agreed to delegate the decision to the LEP Chief Executive Officer to commit further marginal funds to Steer ED and SKV to support enhanced consultation and communications around the strategy production process.
- **BOOST Programme** – It was noted that an update on the BOOST programme would be reported to the Lancashire Enterprise Partnership Board.



Full agendas and minutes for the Business Support Management Board meetings can be accessed here:

<http://council.lancashire.gov.uk/ieListMeetings.aspx?CommitteeID=1220>

8. Urgent Business Procedure

There have been no items of urgent business considered by written resolution by LEP Directors since the last ordinary meeting of the Lancashire Enterprise Partnership Board held on 11 May 2019.

List of Background Papers

Paper	Date	Contact/Tel
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None		
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Reason for inclusion in Part II, if appropriate

N/A

Agenda Item 12

(NOT FOR PUBLICATION: By virtue of paragraph(s) 3 of Part 1 of Schedule 12A of the Local Government Act 1972. It is considered that all the circumstances of the case the public interest in maintaining the exemption outweighs the public interest in disclosing the information)

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Agenda Item 13

(NOT FOR PUBLICATION: By virtue of paragraph(s) 3 of Part 1 of Schedule 12A of the Local Government Act 1972. It is considered that all the circumstances of the case the public interest in maintaining the exemption outweighs the public interest in disclosing the information)

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Agenda Item 14

(NOT FOR PUBLICATION: By virtue of paragraph(s) 1 of Part 1 of Schedule 12A of the Local Government Act 1972. It is considered that all the circumstances of the case the public interest in maintaining the exemption outweighs the public interest in disclosing the information)

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Agenda Item 15

(NOT FOR PUBLICATION: By virtue of paragraph(s) 3 of Part 1 of Schedule 12A of the Local Government Act 1972. It is considered that all the circumstances of the case the public interest in maintaining the exemption outweighs the public interest in disclosing the information)

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