

Appendix 1

AN ECONOMIC STRATEGY FOR CHESHIRE EAST

2020 to 2025

DEC-2019

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1. CONTENTS

1. Contents.....	3
2. Foreword.....	4
3. Introduction.....	5
4. Economic Context.....	6
5. Ambition for Growth.....	7
6. Priority Themes & Strategic Objectives on a Page.....	8
7. Strategic Theme 1 - The Place to Live.....	9
8. Strategic Theme 2 - The Place to Connect.....	13
9. Strategic Theme 3 - The Place to Work and Learn.....	16
10. Strategic Theme 4 - The Place to Invest.....	19
11. Strategic Theme 5 - The Place to Visit.....	23
12. Measuring Success.....	25
13. Governance.....	26

2. FOREWORD

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3. INTRODUCTION

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

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

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

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

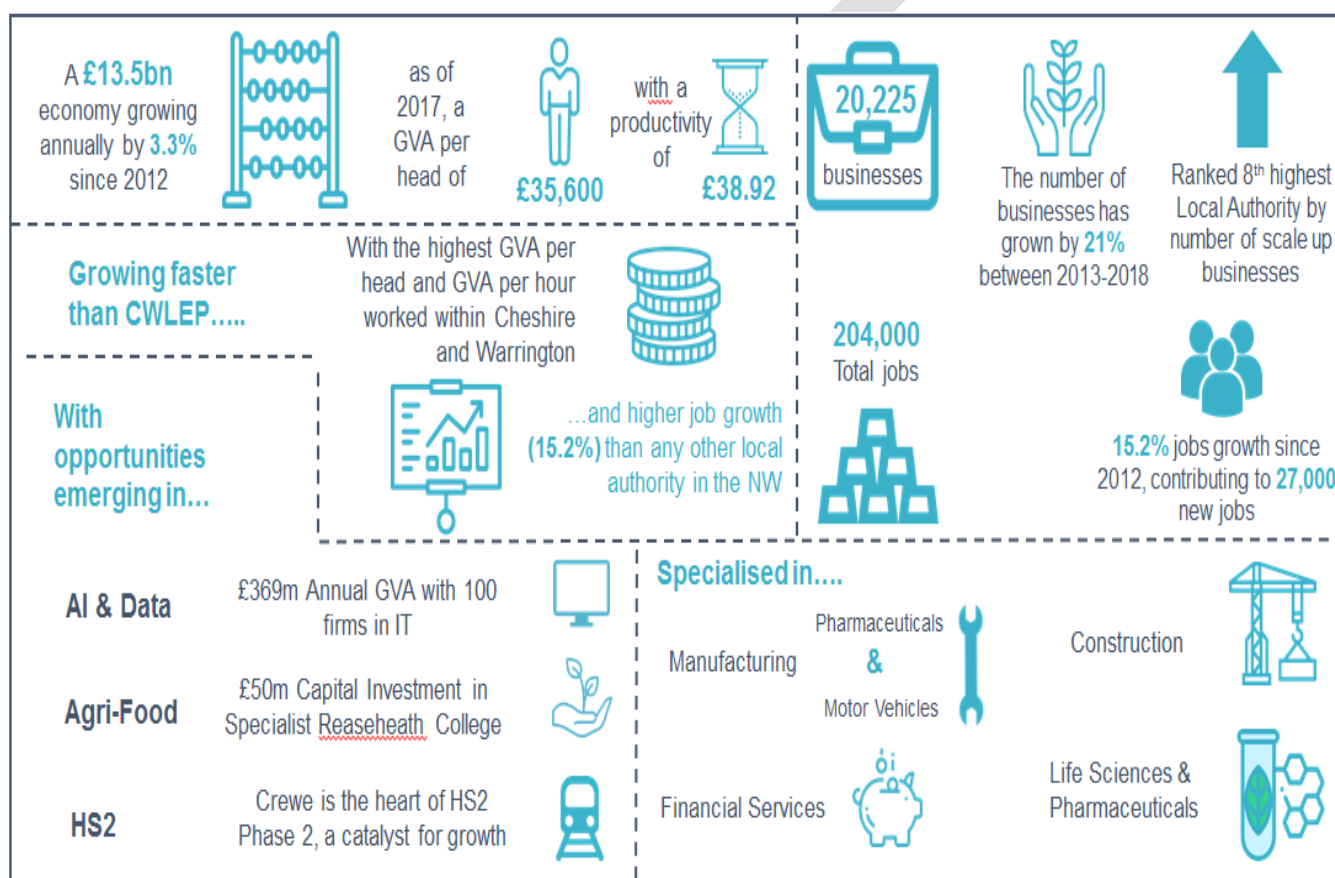
- **Protect and enhance the quality of place and environment that is so important to the character of Cheshire East, from its towns to its rural areas, from its cultural offer to its green infrastructure and also intervene in the housing market to deliver the right houses in the right places.**
- **Secure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

The five-year Cheshire East Economic Strategy 2020 – 2025 and associated Action Plan set out an ambition for inclusive and sustainable growth and the key priorities to enable and drive forward delivery. This will support us in; articulating our offer and opportunity to investors; framing our conversations with the Local Enterprise Partnership (LEP) and Government Departments and any strategic bids we will be submitting in the future for national programmes; and ensuring we are prepared for the post Exit from the EU funding landscape and the UK Shared Prosperity Fund.

4. ECONOMIC CONTEXT

Building on our success

Cheshire East is one of the UK's most successful places with our economic performance consistently and significantly exceeding both the regional and national average. Our existing economy delivers £13.5 billion annually¹ and economic output has increased in a time of stagnating productivity nationally and makes a substantial contribution to the sub-regional economy; generating around 44% of the Cheshire and Warrington output and 8% of the North West output.



GVA and GVA per head – 2017 with average annual growth 2012-17 using chained volume measure in 2016 prices; GVA per hour – in 2017 prices; businesses and micros – 2018 with growth 2013-18; business birth and deaths – 2016; population – 2017 with growth 2012-17; employment rate, occupations and qualifications – 2017; model based unemployment rate – 2018; jobs – 2017 with growth 2012-17; Living Wage – 2017.

Addressing our challenges and barriers to growth

We have made significant progress, with a programme of action for economic growth in place flowing from the Local Enterprise Partnership's Strategic Economic Plan and our growth proposals. However, there are a number of challenges that could affect our ambition to sustain this growth. Whilst some of these are related to physical constraints on development and connectivity, there are also social inequalities across the Borough and we are keen to level up performance and opportunity to create inclusive and sustainable places.

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

5. AMBITION FOR GROWTH

Making Cheshire East ‘The Place to Be’

We are ideally positioned for growth, with excellent connectivity, a strong economy with even greater potential and a pro-investment approach. Our ambition is to be a place that is attractive to a well-educated, skilled, adaptable workforce, delivers vibrant town centres and commercial spaces and offers high quality urban and rural places. However, this growth must be balanced with quality and focussed on the right areas to not only improve productivity but ensure that this growth is inclusive and sustainable.

We will promote ‘inclusive growth’ which combines increased prosperity with greater equality; creates opportunities for all our residents; and distributes the benefits of increased prosperity fairly. We will develop communities where the quality of housing; its type, tenure and cost; and its location are of primary importance to ensure that everyone can participate in their community.

We will take a ‘sustainable approach’ to growth, supporting measures that will protect and improve our environment for future generations; encouraging businesses, residents, visitors and organisations across Cheshire East to reduce their carbon footprint and to protect and enhance our natural environment. This is set out in our Environment Strategy as we seek to become a carbon neutral borough, increase resilience, encourage more sustainable consumption and production, seek clean growth and to deliver an outstanding natural environment; and in our Local Transport Plan where we promote sustainable travel options, thinking about integrated planning and transport, walking, cycling, expanding public transit infrastructure and improving existing public transit services.

Recognising the need to attract and retain businesses, the target age range and skills sets that we need to fulfil our ambitions for growth, quality of place will be an important part of our Economic Strategy along with Place Marketing, supporting locational decisions about where to live, work and invest. Our vision for these places is therefore not limited to infrastructure and commercial development but recognises the importance and contribution that culture, heritage, green and blue infrastructure, leisure and the visitor offer can bring to the quality of place.

Our Local Plan aims to support 58,100 additional residents, 36,000 new homes and 31,000 new jobs being delivered by 2030. We will therefore be a driving force in delivering the LEP’s target to grow the sub-regional economy to £50 billion GVA by 2040.

So for the period of this strategy by 2025 there is an ambition to:

- **Grow the Cheshire East Economy to at least £15 billion**
- **Create an additional 7,000 jobs**
- **Build up to 10,000 new homes in line with the current local plan**
- **Be 20% more productive than the UK average**

We have five priority themes to make our vision a reality - together they will help to ensure that Cheshire East continues to provide the best ‘Place to Be’ for all our residents, visitors, businesses and investors.

6. PRIORITY THEMES AND STRATEGIC OBJECTIVES

Priority Theme 1- The Place to Live:

Protect and enhance the quality of place and environment that is so important to the character of Cheshire East, from its towns to its rural areas, from its cultural offer to its green infrastructure and also intervene in the housing market to deliver the right houses in the right places.

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

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

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

Priority Theme 2 – The Place to Connect:

Secure investment in strategic infrastructure such as rail hub stations and major roads to enable housing and employment growth to be delivered in a sustainable manner in line with the Local Plan, capitalising on the potential growth opportunity of HS2 and improving connectivity options, efficiency and sustainability.

Strategic Objective 4 – Capitalise on the growth opportunity of HS2

Strategic Objective 5 - Improve connectivity options, efficiency and sustainability

Priority Theme 3 – The Place to Learn and Work:

Develop the workforce to provide the right skills for our economy by supporting our residents to improve their skills levels and ensuring education provision meets the demands of our employers and deliver inclusive growth.

Strategic Objective 6 – Support residents to improve their skills levels

Strategic Objective 7 - Ensure education provision meets employer demand

Priority Theme 4 – The Place to Invest:

Create the right conditions for business growth with a focus on our key businesses and growth sectors through tailored support, the provision of inward investment opportunities and place marketing.

Strategic Objective 8 - Strengthen business support, particularly for our key businesses

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

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

Priority Theme 5 – The Place to Visit:

Increase the economic contribution of the cultural and visitor economy and position Cheshire East as a visitor destination.

Strategic Objective 11 – Increase the economic contribution of the cultural and visitor economy

Strategic Objective 12 – Position Cheshire East as a visitor destination

7. PRIORITY THEME 1 - *‘The Place to live’*

Cheshire East provides opportunities to enjoy a high quality of life with thriving market towns and village communities; a network of open space and waterways; major leisure and retail operators; plus visitor attractions including Jodrell Bank, Quarry Bank Mill and Tatton Park. A proven ‘Quality of Place’ for Cheshire East has twice topped the Grant Thornton Vibrant Economy Index for the North West.²

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

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

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

Crewe - Is a gateway with exceptional connections and a bright future evolving as it strives to meet the needs of a rapidly growing and increasingly aspirational residential catchment area and an ambitious business community. There are a number of projects and programmes taking place across Crewe that are working to deliver benefits across the town and encourage pride and positivity in the local area; from major regeneration and infrastructure schemes to cultural strategies, HS2 preparation and planning frameworks for future development. All this activity is underpinned by themes including connectivity inside and outside of the town (at a local and a sub-regional level); economic opportunity; environment; heritage and culture; health and wellbeing; learning, skills and education. These programmes are seeking to tell the Crewe story, working together both in partnership and strategically across any shared opportunities empowering the residents and businesses of Crewe to shape the towns future. The Council is leading on the comprehensive regeneration of Crewe Town Centre with a £40 million programme of work including a flagship, mixed-use retail and leisure development. The town centre regeneration scheme, which includes a £10 million allocated from the Local Growth Fund, plays a central role in kick starting preparations to make Crewe “HS2 Ready” and has already secured one of the UK’s leading independent cinema operators to anchor the development.

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

³ Cheshire Business Survey 2017

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Macclesfield - Enjoys a reputation as a creative and entrepreneurial place with a unique character, easy access to the Peak District, and good transport connectivity - particularly to Manchester and London via the West Coast Main Line. It is a place with many strengths including its independent shops, built heritage assets, dynamic businesses and an affluent catchment population. The town centre has however been identified as a place not currently fulfilling its potential; a place with opportunities to support further revitalisation and investment. A Strategic Regeneration Framework has been developed for the town centre and approved by Cheshire East Council setting out a clear vision, principles and key objectives for the future development and regeneration of the town centre. Articulating the Council's long-term commitment to Macclesfield, it is intended to provide the development sector with the confidence and certainty needed to bring forward investment, jobs and economic growth. There are already positive signs of significant private investment in the town centre with several central residential schemes already on site – both new build and conversions, as well as some key investments in the food and beverage sector in particular. The Strategic Regeneration Framework outlines several potential further opportunities for development around the town centre such as around the station gateway and other areas where the Council owns substantial surface car parks offering scope for redevelopment, whilst making clear that any proposals brought forward must reinforce not dilute Macclesfield's unique sense of place, recognising that preserving Macclesfield's distinctiveness is key to unlocking its true potential.

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

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

Housing is essential to support growth. If housing is considered in isolation to our planned investment and regeneration, then sustainable growth or successful outcomes are unlikely to be

achieved. We want to influence the type and quality of new homes, ensuring that the right mix of housing tenure is delivered in the right place at the right time and in conjunction with employment development and infrastructure schemes. Where the market is not currently meeting housing need we will explore interventions to bring this forward. The new Cheshire East Housing Strategy addresses the Council's approach to new housing between 2018 and 2023 and reflects the changes to the local and national housing policy landscape.

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

Accelerating delivery – As our economy grows so too will our population. The newly adopted Local Plan allocates around 2,500 acres of land for housing, an area over 3 times the size of the city of London and large enough to lay out more than 1,400 football pitches; we currently have planning consent for over 20,000 units in place and 400 housing sites are under construction. 2,321 homes were built in Cheshire East in 2017/18; the 8th highest delivery rate in England. The focus going forward will be on accelerating the pace of delivery on the significant quantum of land currently identified; delivery of 30% affordable housing allocations; exploring the potential of interventions such as access to funding (a main constraint on delivery), use of modular construction methods and development of construction training schemes.

Choice of tenure - The borough has significant housing challenges that go beyond the quantum of housing provision with the need to meet affordable housing challenges in the north of the borough and to support regeneration in Crewe and Macclesfield. The housing offer also needs to be responsive to demographic shifts, meeting the needs of an aging population while providing for the formation of new households. In order to meet these challenges the authority wants to work more closely with government on a shared basis to deliver housing and innovate in terms of housing products and delivery. Properties need to be a mix of tenures to provide affordable options and present opportunities for those who wish to access the housing ladder, but also provide a good quality rental sector. We are actively working with our Registered Providers to bring forward new affordable homes and show our commitment to delivering Government initiatives by exploring mechanisms to bring forward mixed tenure housing developments on our own land assets.

Current housing stock - Whilst concentrating on increasing the supply of new homes, we need to ensure that our current housing stock doesn't deteriorate. We do this by offering financial assistance via loans to residents who are not able to access alternative financial assistance via commercial lenders. We have increased our relationships with private rented landlords and provided direct support for our most vulnerable residents, for example we have completed almost 6,000 adaptations at a cost over £4 million, to enable occupants to live independently.

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

The conservation of our rural environment and support for the rural economy are key components of the Economic Strategy. An Environment Strategy along with related plans for green infrastructure, air quality and landscape will help set the direction for environmental protection, stewardship and enhancement of the Borough. Alongside the Economic Strategy, it will help to define how Cheshire East will build on its strengths to deliver quality of place and

support a healthy, prosperous and sustainable community. There are interdependencies between the two strategies that need to be closely managed to ensure economic aspirations do not have a detrimental affect on the environment, however delivering sustainable infrastructure and business environments could be a significant attractor for business to invest in the borough.

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

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

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

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

8. PRIORITY THEME 2 - *‘The Place to connect’*

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

Historic transport routes crisscross the borough in the form of canals, railways and historic roadways, further enriching the built heritage of the borough and influencing aspects of the townscape and development of towns and villages. There is the opportunity to secure transformational benefits from significant new national investment especially the new High Speed rail network and Northern Powerhouse Rail.

However, the road network is already demonstrating reduced resilience while rail travel is hampered by a disjointed and complex network. Major upgrades are required to support productivity growth in the future coordinated with local growth priorities and housing development. Progress has been made in identifying the transport infrastructure required to support the growth aspirations of the sub-region through transport studies and the Cheshire East Local Transport Plan (LTP) considers the connectivity required at all spatial scales and interconnections and sets out the Council's approach to investment in transport and infrastructure between 2018 and 2023. We want to provide 'sustainable travel options' not just transport and consideration is being given to integrated planning and transport, walking, cycling, expanding public transit infrastructure and improving existing public transit services.

Strategic Objective 4 – Capitalise on the growth opportunity of HS2

Whilst HS2 is a fantastic engineering project we see it as a more of a strategic growth project. The legacy of HS2 is not the railway and a station but the sustainable good growth and social benefits associated to it. For us it's less about shorter journey times and more about changing places and improving people's lives. Cheshire East Council is supportive of the economic impacts of High Speed Rail but is working with Government to keep environmental impacts to a minimum.

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

The Constellation Partnership – The Constellation Partnership is an alliance of 7 major local authorities and 2 Local Enterprise Partnerships. The Partnership's Growth Strategy aims to capitalise on the arrival of HS2, building on existing infrastructure development to unlock development and drive growth across neighbouring economies and connecting the Northern Powerhouse to the Midlands Engine. This should help to deliver at least 120,000 new jobs and

100,000 new homes with £6 bn of GVA by 2040 across the partnership area and a 10-year delivery plan is being developed identifying priorities, including the Crewe HS2 enhanced station.

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

Investment in Crewe - The last investment in Crewe of this size was in the Victorian era. HS2 will offer an attractive location for new investment and businesses; 55 minutes from London and 20 minutes from both Manchester and Birmingham. We recognise the importance of the Crewe Hub in creating the infrastructure that connects a vibrant economic area with the rest of the world; capitalising on Crewe's high speed links to GM, Manchester Airport, London, Birmingham. We are already working on delivering town centre improvements getting Crewe 'HS2 ready'. The Council is delivering an ambitious programme of major schemes and upgrades and has secured significant contributions from Central Government.

Investment in new enabling infrastructure – A programme of over £300 million of new highways infrastructure to be delivered in Cheshire East to complement the growth associated with the arrival of HS2. Major schemes include Congleton Link Road which will unlock around 2,200 new homes and 20 ha of employment land while removing heavy through traffic from the town centre; Middlewich Eastern Bypass which is expected to deliver 1,950 new homes and 6,500 new jobs through land release; and the A500 duelling will remove a major pinch point at Junction 16, improve connectivity and ensure smooth passage for HS2 construction traffic. All three schemes are expected to be delivered over the next 3 to 4 years, easing serious congestion points and supporting economic growth. The North West Crewe Package identifies 2 development sites which offer the provision for 1,350 homes and a new local neighbourhood hub plus 5 ha of employment land supporting future development and significantly enhancing connectivity to HS2 from surrounding areas.

Strategic Objective 5 – Improve connectivity options, efficiency and sustainability

Good connectivity will help us to increase productivity and improve access to centres of employment. It can improve access to markets, increasing the pool of workers available to work in higher productivity urban locations and connect our employment sites both around the borough and with our neighbours. The integration of different transport modes has the ability to increase efficiency and sustainability. A lack of integration between transport services results in significant increases in journey time and thus discourages greater use of bus and rail services. Connectivity also needs to take account of alternative modes of 'active' travel including walking and cycling.

In a recent business survey the most commonly cited disadvantage of being located in Cheshire East was traffic congestion (14%) followed by inadequate broadband coverage (7%) and dissatisfaction with broadband coverage is more prevalent in rural areas (20% as opposed to 7% in urban areas).⁴ There is therefore a need to invest in transport services, infrastructure and maintenance; the transport network must get people and goods to where they need to be

⁴ Cheshire Business Survey 2017

efficiently and sustainably and we need to find solutions to create and improve digital infrastructure across the whole Borough.

Manchester Airport - Cheshire East benefits from close access to the worldwide air services that it offers. Passenger numbers continue to grow with more than 28.2 million passing through in 2018. The Council will continue to look to maximise the access to the airport for our residents and businesses by road and rail and work with Manchester Airport and Greater Manchester to support growth for Cheshire East as the airport undertakes its investment programme. However, whilst this growth provides opportunities for businesses and visitors, this should be balanced with environmental considerations.

SEMMS - The Council is working with partners on refreshing the South East Manchester Multi-Modal Study (SEMMS) which was originally published in 2001. This refresh is linked to Airport City, Northern Powerhouse Rail/HS3 and the Greater Manchester Spatial Framework and will also have an impact on the sub-region promoting further growth. The 20-year strategy will be developed to deal with existing and predicted transport problems in the area.

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

Digital connectivity - Since 2010, Cheshire East has led the Connecting Cheshire programme. This has helped us achieve 95% superfast broadband coverage (with speeds >24mbps), with take-up rates being in the top ten nationally. However, with increasing technological advances and demand for more data there is growing demand for gigabit (full fibre) capability and a new government target to achieve 100% full fibre ultrafast technology (with speeds >1000mbps) by 2033 has been set. Cheshire East's current full fibre coverage position is 3.4%. The new broadband target illustrates the pace of change we can expect from the telecoms sector over the coming years and it is a similar picture with mobile communications. A report by Rural England has found that a third of rural households are unable to make a mobile phone call indoors and more than half unable to access 4G mobile networks. Government's target of 5G for the majority of the population by 2027 seems ambitious to those in such areas, and again presents the risk that our remote localities will get left behind. To tackle connectivity 'not-spots', government has announced a new "Rural Gigabit Connectivity" programme.

9. PRIORITY THEME 3 - *‘The Place to work and learn’*

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

One key challenge in Cheshire East relates to skills in our population. Recent analysis⁵ reports that; a declining workforce and ageing population; skills mis-matches with replacement demand; significant commuting flows both in and out of the Borough; health related worklessness; and low pay progression; are all contributing to reduced productivity. Whilst our population is highly qualified, with over 45% holding a level 4 or above qualification, there are parts of the Borough where qualification levels are much lower.⁶ Addressing these challenges is of paramount importance if we are to support our businesses to grow and achieve our ambitious economic target to double the economy.

Strategic Objective 6 – Support residents to improve their skills levels

In some of the urban areas of Crewe and Macclesfield, over 30% of the working age population claim out of work benefits. People living in these areas often face multiple barriers to accessing and sustaining employment which not only include a requirement for skills but may also relate to health issues, disability, lack of affordable housing, transport, childcare provision or other care responsibilities. There is a need to more effectively align skills provision targeted at this cohort with local employment opportunities.

Health related worklessness - Unemployment has negative impacts on physical and mental health and being unemployed with a health problem carries a cost for both the individual and society. Individuals with disabilities are less likely to be employed than those with a health condition, but people with mental health issues, and particularly those severe enough to be in secondary care, have the lowest rates of employment. A successful approach to health related worklessness will need to provide services that meet the needs of a range of individuals and needs. It will also need to work with employers to improve opportunities for work.

Low pay progression - Improving progression from low pay will mean either helping people to progress their careers or helping employers to shift onto a higher value strategy. A sub-regional programme of activity has been developed to tackle the issues of worklessness and low pay progression. Over £1m of innovation funding has already been secured for the area and further bids for supported employment provision are in process.

⁵ Cheshire and Warrington SEP refresh March 2018

⁶ Data from the 2011 census

Young people – It is important for young people to have the opportunity to develop skills and pathways into work that showcase talent, creativity and potential and the value of supporting young people to develop practical skills and creative thinking has been recognised. Higher volumes of high quality degree level vocational activity should be delivered through local further education providers, including the development of infrastructure to deliver degree level apprenticeships.

Apprenticeship growth – Cheshire East performs relatively well in terms of the number of apprentice starts in the area but the Government has set a high growth target of 3 million which is indicative of higher growth. The Apprenticeship Levy was introduced to encourage businesses to participate in apprenticeship programmes but the circa 150 levy paying businesses based in Cheshire East need to be supported to maximise spend and impact on the skills levels of their workforce.

T-Levels –The introduction of T-Levels aims to streamline technical education and focus on developing skills that sit within 15 industry routes. The first T-Levels will be introduced in September 2020 with full roll-out intended by September 2024. The number of Cheshire East schools or colleges registered to be part of the first wave of T-Levels is limited; one of the challenges being the requirement for extended placements.

STEM skills - The supply of STEM (science, technology, engineering and maths) and ICT skills are critical to the success of our key sectors and strategic initiatives e.g. the Science Corridor and HS2. Increasing the volume of STEM skills and transferable creative and digital skills secured by young people will have a positive impact on productivity levels and help to underpin the wider economy.

Graduate retention - Of the 5,000 Cheshire and Warrington young people who secure University places each year, only a small proportion return to Cheshire East following their graduation. An attractive high quality Higher Education provision linked to local employment opportunities is paramount to strengthening our ability to attract and retain graduates and young professionals, including provision of degree and higher level apprenticeships and a stronger virtual higher education offer across the Borough.

Strategic Objective 7 - Ensure education provision meets employer demand

Our businesses continue to report they cannot source the skills that they need and that the skills system could be more responsive to these needs, particularly in terms of wider employability skills which currently sit outside mainstream funded provision. Stronger alignment of the demand for and supply of, skills in an area enables businesses to more easily access the talent required to grow while simultaneously enabling more local people to share in the benefits of growth via jobs and wages.

Skills gaps - In a recent business survey, 45% of businesses experienced recruitment difficulties and 83% cited skills as an issue. A significant proportion of employers require digital and Science, Technology, Engineering and Maths or “STEM” skills yet we have relatively small numbers of people studying these subjects or taking up apprenticeships in these areas.

Importing labour – Data from the last two Censuses shows that Cheshire East has shifted from being a net exporter of labour to an overall net importer. The most recent (2011) Census shows a net inflow of 25-34 year-olds which when coupled with a decrease in 25 to 34-year olds as a proportion of total population within Cheshire East, suggests that workers in this age range are

not living within the Borough. However, there is some outflow of workers within this age implying that skills gaps are also an issue for this age range.

Careers information - There is concern across the Borough that the quality of work experience and careers education, information, advice and guidance (CEIAG) is variable and is not always aligned to local labour market opportunities, career pathways and apprenticeships. Operated and part funded by the national Careers & Enterprise Company, the Cheshire East network was established in 2017 and connects secondary schools and colleges with employers and careers programme providers and supports them to work together to provide young people with effective and high quality encounters with the world of work. The Cheshire East Enterprise Coordinator supports a group of senior business volunteers, (Enterprise Advisers), who are matched with a school or college in the network.

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

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

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

10. PRIORITY THEME 4 - *'The Place to invest'*

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

Cheshire East has identified a number of 'growth sectors'. These are the key economic areas where the evidence shows particular economic strengths in Cheshire East (in terms of employment size, level of specialisation or business presence), or areas with clear potential for future growth:

- Life Science and Pharma Sector
- Advanced Manufacturing
- Creative & Digital
- Agri-tech
- Transport and Logistics
- Visitor Economy
- Clean Growth/Low Carbon

Further detail on them is set out in the Economic Data Appendix II and is brought out in the Local Industrial Strategy.

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

Business support is an important mechanism to boost productivity and business resilience by providing companies (particularly SMEs) with the funding and expertise they need to improve efficiency and business practices, adopt automation and digital solutions, innovate and develop new products for higher-value markets, develop the appropriate skills and adjust to a higher-value and higher-pay economy. Feedback from the business community tells us that they experience confusion and difficulty in accessing appropriate and most importantly impartial business support solutions so that only a small proportion of businesses, particularly from the SME community, have accessed any type of business support.

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

Top 100 Strategic Investors - Cheshire East's successful economic performance is due, in large part, to the presence of several very large, high GVA producing businesses. These 'strategic investors' need high quality 'account management' to ensure risk of disinvestment is reduced and new investment propositions are supported and we continue to develop the capability to provide high quality account management to our strategic investors.

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

targeted support to boost business investment and productivity of the borough's high growth potential SMEs.

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

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

Cheshire East has some of the most significant science and innovation assets in the world. Collectively these assets form the North East Cheshire Science Corridor which with other science hubs across the sub-region forms the strategic priority of the Cheshire Science Corridor. The Greater Manchester and Cheshire Life Sciences Fund is a seed and early stage venture capital fund investing in a range of life science businesses across all stages of development, from initial market research and concept development through to product/services launch and manufacturing. The £42m fund has been created by the Council in partnership with the Greater Manchester Combined Authority, Cheshire and Warrington LEP, and Manchester Science Partnerships.

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

Jodrell Bank Centre for Astrophysics – The site is an important piece of our national heritage and has recently been awarded UNESCO World Heritage Site status. The First Light Project at Jodrell Bank is a £22.5m project supported by the Heritage Lottery Fund. It will deliver a new visitor facility formalising Jodrell Bank's arts programme and bringing together the arts, digital technology, science heritage and culture. It is estimated to be able to attract an additional 127,000 visitors per year initially rising to 350,000 to 400,000 within the first 3 to 5 years. Jodrell has also successfully competed to host the permanent headquarters for the world's largest network of radio telescopes, an observatory that aims to delve deep into the early history of the universe; the 'Square Kilometre Array' or SKA project to deliver an additional 200 jobs on site.

Alderley Park - As a major strategic employment site within Cheshire East, Alderley Park plays a pivotal role in the wider North West science ecosystem. As part of the Cheshire Science Corridor Enterprise Zone it benefits from the opportunities associated to this status. The former Astra Zeneca site was acquired by Alderley Park Limited in 2014. Bruntwood and Legal & General Capital are investing £360m of capital, property and intellectual assets to establish a landmark 50:50 partnership to create a new company, Bruntwood SciTech. This will be the UK's largest property platform dedicated to driving science and technology growth in regional cities with a business plan designed to support the creation of more than 20,000 high-value jobs and Alderley Park is one of the sites in the joint venture.

Alderley Park Accelerator - Since its launch in 2013, the Accelerator has become home to over 120 companies employing over 400 people. The key to success of these businesses is the support services provided including providing specialist workspace for growing life science companies, including access to high-end equipment, shared services and training, as well as business advice through its expert network.

Medicine Technologies Catapult - A new £5m Catapult Centre has been established to bring together business with researchers with the aim of helping start-ups bring ideas to market. Location of the AMR (anti-microbial resistance) Centre of Excellence at Alderley Park with an initial £4m investment is part of the global campaign to develop new drugs and antibiotics, discover more effective treatments and anti-infectives and develop new public policy and clinical practice.

Macclesfield Science Opportunity Zone - AstraZeneca currently occupies 100 acres at the Hurdsfield Industrial Estate on the eastern side of Macclesfield, as their second largest global production operation with a unique capability in aseptic manufacture. 4,000 people are currently employed in activities covering pharmaceutical R&D, manufacturing and corporate office functions. The site is the home of the \$1bn oncology product, Zoladex, which is supplied to all markets. Products from the site are distributed to 130 global markets and are estimated to account for 1% of the UK's exports.

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

Investment deals in Cheshire East were consistently high in 2018 in terms of total spend (£69.73 million) and space exchanged (81,269 m²) which, aside from 2017, is the largest total on record since 2010. The retail sector accounted for most of the deals but industrial deals produced the most significant value (£37.39 million and 82% of all investment). The office market is buoyant across the borough with the highest number of deals taking place in the north of the Borough dominated by Alderley Park. Rents are strong reflecting the demand for inward investment and business growth in Cheshire East and the low supply of land and premises, particularly of higher quality based on these levels of take up.

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

Place Marketing - Cheshire East is not a single place: it is a 'place of places' set within a wider geography. It has a number of propositions, some of which are set in a context with other places outside the Borough and we are in competition. This makes it particularly important to develop a clear vision and a strong strategy for place marketing and inward investment to raise the profile of Cheshire East and its distinctive attributes. We are developing a refreshed place marketing offer including a strategic approach to events and branding, building on the place's national and international gateway and recognising that propositions will need to be based on individual places or sector-specific opportunities.

Cultural Offer – A strong cultural offer can attract high-skilled workers and retain graduates, this being a significant pull factor in the location decisions of businesses and particularly creative businesses. We will develop our cultural offer for both residents and local businesses and to attract more inward investors, particularly those with higher value jobs.

Target Markets - We will work with existing investors addressing indigenous growth, particularly SMEs, through facilitation and business engagement as well as communicating a competitive

proposition for Cheshire East, providing marketing collateral to identify opportunities and equip businesses and other organisations to help articulate and promote the proposition.

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11. PRIORITY THEME 5 - *‘The Place to visit’*

Cheshire East has a successful cultural and visitor economy sector based on its key attractions and events. Delivery of rural, cultural & visitor economy activity can also support and add value to the wider proposition, growth initiatives and quality of place, providing a setting for people choosing to live, work and invest in the area.

Figures for the value of the visitor economy in Cheshire East have hit a high at £963m. The detailed analysis of the figures shows a 77.1% increase in the value of the visitor economy to Cheshire East since the Borough came into being in 2009. Overnight stays in 2018 injected over £220m into the economy; an increase of 3.4% on the previous year and an increase of 67.7% since 2009. With continuing investment in the Borough’s heritage attractions and with HS2 on the horizon; this could lead to a further boost in numbers as the projects develop.

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

The Cheshire East Visitor Economy Strategy has aligned itself to the Visit England Strategic Framework for Tourism Report for 2010 to 2020 in setting out an ambition to grow the value of the Visitor Economy by 5% year on year so that the target value for Cheshire East in 2020 is £1.076 billion. Confidence in the sector continues to grow with major investments from premium hotels and marinas across the Borough and a 69.2% increase in location filming from 2012. The potential of Business Tourism to Cheshire East is important, not just because it helps to keep venues and accommodation providers busy, but because it attracts key business decision makers to our region. Our offer complements the adjacent metropolitan areas, being in the main smaller unique/unusual locations.

Cheshire East can help ensure there is a rich cultural offer to attract visitors, pulling in visitors through the area’s events, arts and heritage and helping to support its value as a ‘Cultural Destination’ through both vibrant towns and the rural setting. The Council also has an important role, along with the Destination Management Organisation, in helping coordinate the activities of stakeholders across the destination and working with partners to achieve growth.

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

Cultural offer - There is a need to focus on our cultural offer as this is often a significant pull factor in the location decisions of businesses, but particularly in creating clusters of creative industries. In addition, a vibrant cultural offer attracts other forms of strategic investment, and integrates new neighbourhoods and infrastructure to maintain thriving and attractive places. Localised strategies to support and enhance the cultural offer can attract and integrate new development to create a cohesive sense of place.

Skills needs - The visitor economy sector continues to grow, helping to support the vibrancy of places and brand positioning. Considerable attention has been given to the recruitment challenges in the sector, but evidence suggests that paying more attention to staff retention

would help to tackle recruitment problems, while also increasing the competency of the hospitality and tourism workforce. The visitor economy also plays an important role, especially for young people in providing 'pathways to work' equipping people with core skills in a vibrant and customer focussed sector. Added to this there is a requirement to 'change the perception' of tourism and hospitality as a low level seasonal job to that of a rewarding and quick progressing career.

Strategic Objective 12 – Position Cheshire East as a visitor destination

Cheshire East is part of a wider offer due to its connectivity and proximity to major visitor destinations of Manchester, Liverpool, Chester and the Peak District. Opportunities have been sought to develop these with partners and external funding, including Gateway marketing, the 'Cultural destinations' programme, Discover England funding and joint marketing initiatives. Working with destinations, travel trade and the tourism industry and targeting the US market, Marketing Manchester leads a partnership that includes Marketing Cheshire, to maximise the potential of the North of England as an international destination and the Airport as a gateway to the North.

Business Tourism – Research identifies that a focus on niche markets that support existing specialisms as well as the 'Associations' and meetings markets are worth developing further. 'Brilliant Science' is a Visit England funded pilot that has developed a range of thematic itineraries and packages to suit different interests and needs. A similar approach for other key sectors could have value in reaching the potential of the business tourism and meetings offer.

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

Strategic Events – Events are identified within the Council's Visitor Economy Strategy (2016-2020) as an important driver with direct economic benefit. For example, by hosting the Cheshire East tour of Britain in 2016 the borough benefitted from £3.5m of economic activity on one day. Marketing Cheshire has also identified major events as a key economic driver for Cheshire overall.

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

12. MEASURING SUCCESS

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

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

The Local Area Industrial Strategy (LAIS) for Cheshire East has been produced to help support delivery of the Cheshire and Warrington Strategic Economic Plan (SEP), Local Industrial Strategy (LIS) and the Cheshire East Economic Strategy; linking these strategic documents together and highlighting areas of local distinctiveness. The focus of the LAIS is on productivity; setting a target for Cheshire East to build on its strong economic position and increase productivity to 22% above the UK average by 2030.

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

So for the period of this strategy by 2025 there is an ambition to:

- **Grow the Cheshire East Economy to at least £15 billion**
- **Create an additional 7,000 jobs**
- **Build up to 10,000 new homes in line with the current local plan**
- **Be 20% more productive than the UK average**

13. GOVERNANCE

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

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

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

Our priorities here constitute a Cheshire East Council led programme of work but we recognise that much economic development is undertaken at the sub-regional level and in partnership with the Local Enterprise Partnership, Government and the private sector and growth is also likely to come from business led investment.

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