



THE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE ■

UNDERSTANDING BREXIT IMPACTS AT A LOCAL LEVEL

Pendle case study

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Summary of the project and its objectives

The UK is in a critical juncture with regard to the process of negotiations to leave the European Union. Important discussions are taking place which will shape the future relation between Britain and the EU. The economic analyses published on the issue have, so far, largely failed to grasp the attention of the general public. Most of the discussions about Brexit have focused at a national level and there has been very little evidence-based discussion at a local level. This project aims at stimulating a reflexive participatory research process involving citizens, policy-makers, business people and civil-society representatives. It introduces an innovative methodology that contextualises quantitative data through expert interviews and the analysis of local sources. The reports and discussion panels organised within the framework of the project seek to increase our understanding about the impact of Brexit at a local level.

Understanding Brexit impacts at a local level

Pendle case study

This report contributes to the broader research project co-ordinated by the Conflict and Civil Society Research Unit at the London School of Economics and Political Science (LSE).

This study focuses on the perceived impact of Brexit on British local authorities. Five local authority case studies have been selected: **Mansfield, Pendle, Ceredigion, Southampton** and **Barnet**. As the aim of the broader study is to understand the impact of Brexit at the local level, this report is informed chiefly by the qualitative interviews, while the interviews themselves were conditioned by the quantitative impact assessments (see Appendix on page 14) that rely on nation-wide economic data.



Executive summary

Pendle is a relatively small local authority. Its economy is reliant on manufacturing with a particular specialisation in aerospace manufacturing. Pendle's work area is strongly associated with neighbouring Burnley and there has been a recent proliferation of low-skilled, precarious employment in both Burnley and Pendle.

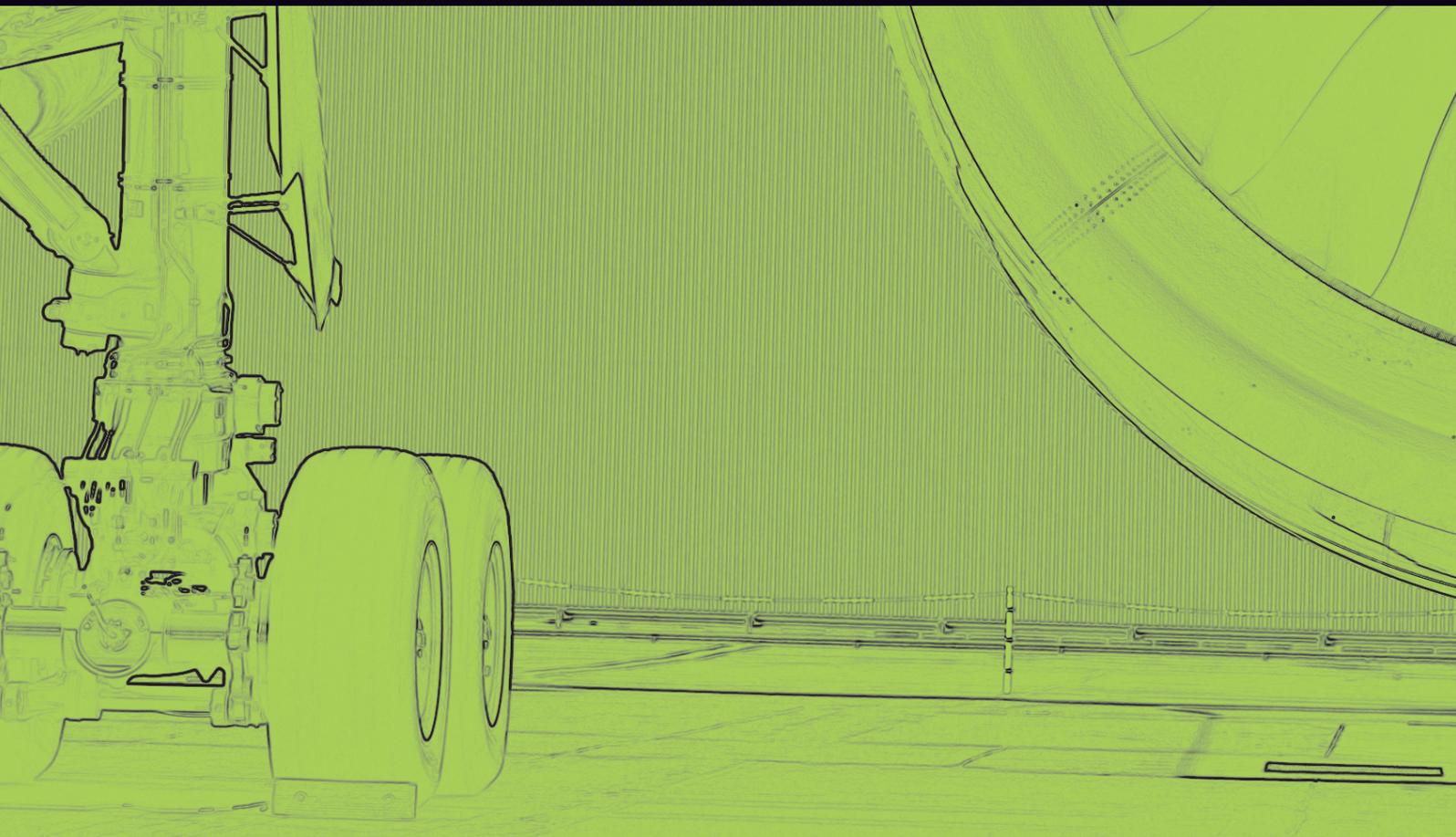
Pendle conforms with the general 'left behind' analysis that has dominated analyses of the Brexit vote. Despite having a below average level of residents born in European Union countries, the primary reason Pendle residents voted heavily in favour of Leave at the 2016 referendum was immigration. To some extent this can be related to the lack of integration with the sizeable Asian minority. But it is also related to perceptions that the small number of immigrants from EU countries has driven wages down.

The primary problems confronting Pendle's economy are skills shortages and declining investment. These problems are related to the changing economic climate in the wake of the 2008 financial crisis. However Britain's withdrawal from the EU is unlikely to provide a more favourable climate in which these issues can be improved.

Leaving the EU could further depreciate levels of investment. Manufacturing firms in the aerospace industry have extensive and complex supply chains. Even the softest form of Brexit is likely to restrict in some way the free movement of capital and the imposition of import and export duties would affect supply chains and manufacturing costs.

Pendle's low level of EU immigration means that the restriction on the movement of labour will not have a widespread impact on the area. However immigration has proved an important means of soft skill share in the past. The decline in access to European universities may also lead to a decline in business access to new technologies.

There is widespread concern regarding the lack of clarity and uncertainty concerning the specific terms of EU exit. This has contributed to a low-growth business environment. There is concern as to whether the government will replace any funding losses created by a lack of access to European structural funds.



Introduction

On 29 March 2017 Theresa May invoked Article 50, thereby officially beginning the United Kingdom's withdrawal from the European Union. Since this date, there have been almost daily newspaper reports and updates on what Brexit will mean for the UK.

And everyday these projections appear to change. Yet little attention has been paid to how Brexit has already politically and economically impacted Britain at the local level. Nor has there been much attention given to projections of how Brexit's impacts are understood and interpreted at the local level.

This report bridges this gap. It provides an overview of the projected economic effects of Brexit on the local authority of Pendle. After providing a contextual overview of Pendle, the report outlines the ways in which Brexit is likely to impact Pendle's economy and what Brexit means in terms of policies for local economic development.

This report draws on a wide range of sources. Through desk research, local reports were sourced from the borough and county councils, the Lancashire Enterprise Partnership and other local organisations. These provide insights into the primary economic challenges that Pendle faces, alongside the local area's approach to economic planning. This was supplemented through interviews with local stakeholders, including councillors, business people and others employed in local organisations. Through this research, a picture of how Brexit is expected to impact Pendle was formed, and throughout the report this is compared with more general academic projections.

Overall, this report shows a mixed picture for Pendle. As an area with high manufacturing, Brexit is likely to present Pendle with significant difficulties. Particularly in the short term, the impact on supply chains for large companies could result in economic downturn. However, the low number of immigrants from EU states and the relatively contained nature of Pendle's economy mean the long-term impact of Brexit may be less painful than for other areas of Britain, in particular around regulations and procurement.



Image 1: Salterforth village in the borough of Pendle



Image 2: A row of unoccupied houses (Lancashire Evening Post)

Background of Pendle

This section provides contextual information on Pendle. In doing so, it outlines some of the reasons Pendle was selected as a case study within the broader aims of the research project.

These include the combination of Pendle's high manufacturing base, relatively high Leave vote at the 2016 referendum and its status as a marginal parliamentary constituency as a result of a significant swing to Labour in 2017.

Pendle's population is 90,600, which makes it a small local authority area relative to other authorities in Lancashire. Its population is split across a number of small towns. Nelson is the largest with a population of 29,135 while Colne, 18,806, and Barnoldswick, 10,752, are the other major centres. These relatively small centres reflect Pendle's relatively low population density when compared to Lancashire and the national average.

These town centres developed in the 19th century as mill towns. Indeed, Pendle's economic development was closely tied to its geographical location between Liverpool and Leeds, making it an ideal location as a cotton-weaving district.¹ Today, mills continue to dot the region's landscape; however the mill economy has largely been replaced by manufacturing. The importance of manufacturing, relative to other industries, is shown in the graph in Figure 1. Pendle's manufacturing base forms 28.1% of total employment in the local authority area, which is three times the national average (9.2%).²

Pendle's manufacturing enjoys a particular specialisation in the aerospace sector. Major aerospace manufacturers in Pendle include Rolls Royce, in Barnoldswick, Merc Engineering, in Barrowford, and Euravia, in Kelbrook. At the same time, it

is important to note that Pendle's economy is predominantly comprised of Small to Medium Enterprises (SMEs), as 90% of Pendle's businesses employ less than 20 people.³ The strong manufacturing base makes Pendle an important case study, given that projections tend to show manufacturing economies to be some of the hardest hit by a potential Brexit.

Also worth noting with regards to Pendle's local economy is its close affinity with neighbouring Burnley. Many Pendle residents will work in Burnley;⁴ however in interviews, it was suggested that they are unlikely to work elsewhere in Lancashire.⁵

This is largely due to the poor transport links outside of the M65.⁶ Within this context, there has been a growth in low-skilled employment in Burnley and Pendle. Two of the biggest low-skilled employers are the distribution centre for the global fashion brand Boohoo, in Burnley, and the call-centre headquarters for the telecommunications firm Daisy Group, in Pendle. Employment in these fields tends to be precarious, with a Channel 4 exposé of Boohoo's employment practices finding that the company was underpaying workers and exposing them to unsafe and dehumanising work practices.⁷

One issue confronting Pendle is that it suffers from relative deprivation.⁸ Based on average IMD Scores, which combine deprivations in terms of income, employment, education, health, crime, housing and living environment, Pendle is ranked 38th out of 326 in terms of deprivation. These areas can be explored in greater depth. In terms of housing, in Pendle house prices

1 See Taylor S. 2000. *Pendle Textile Mills: The Buildings of the Textile Industry in the Borough of Pendle, Lancashire*. English Heritage. Available at: https://www.pendle.gov.uk/download/downloads/id/.../pendle_textile_mills_study.pdf.

2 Lancashire Enterprise Partnership. 2018. *The Burnley and Pendle Labour Market Intelligence Report*. Available at: <https://www.lancshireskillshub.co.uk/wp-content/uploads/2018/04/Burnley-and-Pendle-TTWA-report.pdf>.

3 Ibid.

4 Ibid.

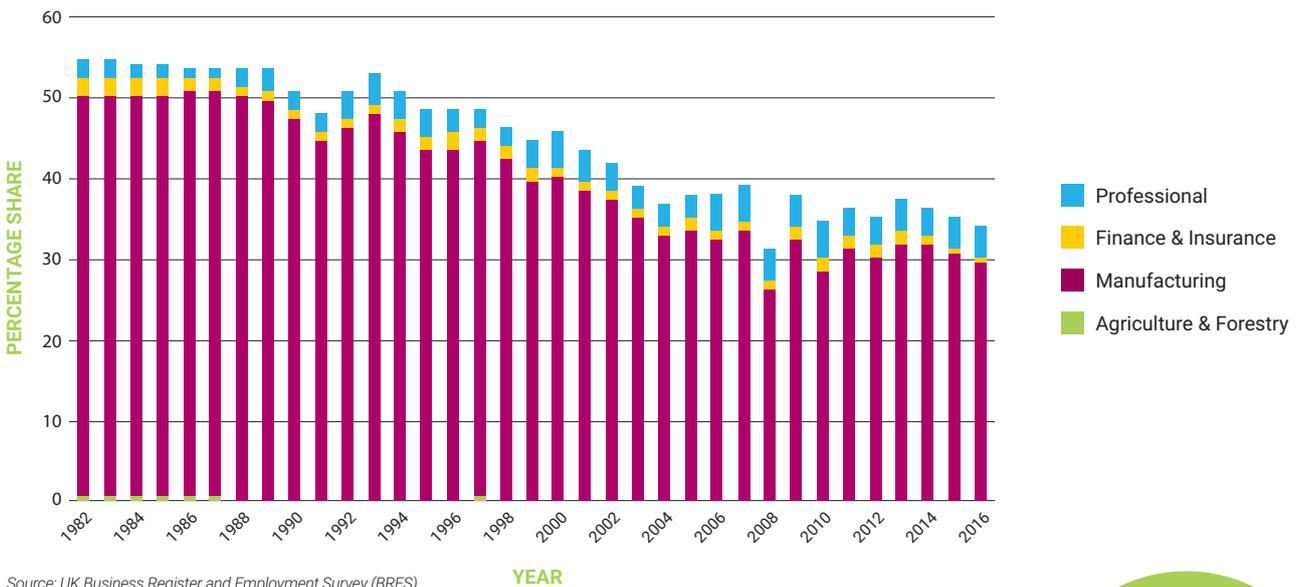
5 Interview with Gordon Lishman, Liberal Democrat candidate at the 2017 General Election, 31 May 2018.

6 Interviews with Dennis Mendoros, Chair of Pendle Vision Board, 30 May 2018, and Joe Cooney, Conservative Councillor on Pendle Borough Council and Lancashire County Council, 1 June 2018.

7 Sanders M. 2018. 'Undercover: Britain's Cheap Clothes: Channel 4 Dispatches'. *Channel 4*. 30 January. Available at: <http://www.channel4.com/info/press/news/undercover-britains-cheap-clothes-channel-4-dispatches-mon-30th-jan>.

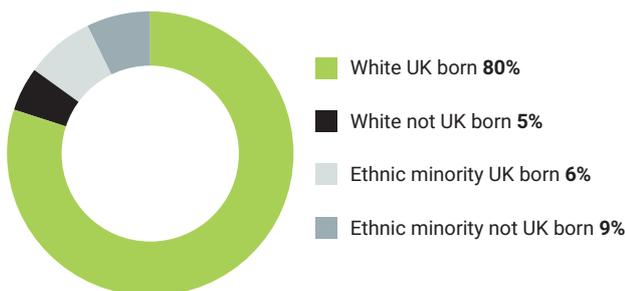
8 The figures in this paragraph are taken from Pendle Borough Council. 2015. *Pendle Profile 2015*. Available at: https://www.pendle.gov.uk/downloads/file/8643/pendle_profile_2015.

Figure 1: Employment share in key industries for Pendle, 1982 to 2016.



are nearly half the national average, 62% of households are in Council Tax Band A (compared to 25% nationally) and Pendle has doubled the number of houses without central heating compared to national averages and averages in Lancashire. In terms of health, life expectancy is below the national average by 1.5 years and 1.3 years for males and females respectively. Pendle also has one of the highest infant mortality rates in the country, whilst also suffering an above average obesity rate.

Figure 2: Pendle population by ethnicity, 2016

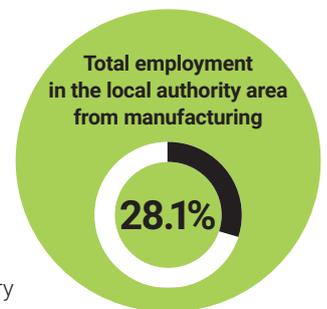


The graph in Figure 2, above, shows that Pendle has a sizeable ethnic community (for more figures see Appendix on page 14). The vast majority of the non-white ethnic minority is Asian

and is largely concentrated in Nelson, where the non-white population is 29.2% compared to 13.4% in the rest of Pendle.⁹

While this dynamic is not unusual, ethnic tensions in the region are very high. In 2001, there were a series of race riots in neighbouring Burnley, described locally as 'the disturbances'. Interviews with local councillors across the party spectrum and with local journalists suggest these divides similarly exist in Pendle, and while they have not culminated in violence, they have continued to simmer since 'the disturbances'.¹⁰

This community developed in the 1950s and 1960s, when post-Second World War labour shortages produced high demand for workers in Pendle's mills. Immigration, from all sources, to Pendle is quite low. Office of National Statistics figures state that 89% of residents were born in the United Kingdom.¹¹ In terms of immigration from the EU, 2.3% of Pendle residents were born in other EU countries.¹² This is 1.4% below the national average. Hence, while Pendle does not face high immigration, several academic accounts of the Brexit vote found that areas like this do tend to have high immigration concerns which translated into high support for leaving the EU.¹³



9 Pendle Borough Council. 2009. *Area Profile for Nelson*. Available at: https://www.pendle.gov.uk/download/downloads/id/6582/area_profile_for_nelson.pdf.

10 Interview with Tony Greaves, Member of House of Lords and Liberal Democrat councillor on Pendle Borough Council, 25 May 2018. See also Engel M. 2017. *The fish-eaters and the fasters*. *New Statesman*. 22 May. Available at: <https://www.newstatesman.com/politics/uk/2017/05/fish-eaters-and-fasters>.

11 Data on Pendle population rely on Office of National Statistics Population Estimates. The most recent estimate is from mid-2016. See: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithintheuk/datasets/localareamigrationindicatorsunitedkingdom>.

12 Ibid.

13 See for instance: Bruter M. and Harrison S.L. 2016. *The impact of Brexit on consumer behaviour*. *Opinium Research*. Available at: http://opinium.co.uk/wp-content/uploads/2016/08/the_impact_of_brexit_on_consumer_behaviour_0.pdf.

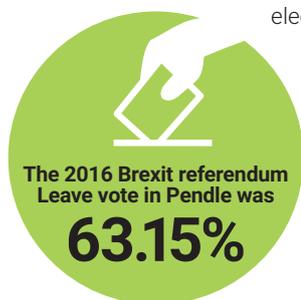


Image 3: Victoria Mill, Burnley, Lancashire

This makes Pendle an important case to explore as divides over immigration have filtered through into local politics. Pendle was the last holdout of the British National Party (BNP), as Brian Parker was the last BNP councillor in the country when he retired before the 2018 local elections.¹⁴ More broadly, politics in Pendle was described as 'poisonous and tribal'.¹⁵ Over the course of preliminary research for this report, Pendle council changed from a Labour and Liberal Democratic coalition to a Conservative majority of one. The 2018 local elections made national news, as the

Conservative's majority includes a councillor who before the elections had been suspended from the party and was forced to contest the election as an independent due to a racist joke shared on their social media account.¹⁶

In terms of national-level politics, Pendle is interesting for several reasons. Its vote in favour of Leave sits well above the national and regional average. At the 2016 Brexit referendum the Leave vote in Pendle was 63.15%. This is close to 12% above the national average, and roughly 10% above the regional average of 53.65% in the North West. The seat swung from Labour to the Conservatives at the 2010 General Election. Significantly, at the 2017 General Election, Labour's Wayne Blackburn enjoyed an 11.2% swing. This saw the majority of the incumbent Conservative MP, Andrew Stephenson, decrease from 12.8% to 2.8%. In the context of the 2016 referendum result, the electoral dynamics in Pendle are interesting as it represents a high Leave-voting seat that subsequently moved from a safe Conservative seat to a marginal Conservative one in between the 2015 and 2017 General Elections.



14 Pidd H. 2018. As the BNP vanishes, do the forces that built it remain? *The Guardian*. 2 May. Available at: <https://www.theguardian.com/politics/2018/may/02/bnps-last-district-councillor-bows-out-but-insists-party-will-rise-again>.

15 Interview with Dominic Collis, journalist at the *Burnley Express*, 30 May 2018.

16 See BBC. 2018. Tories urged to act in 'racist joke' row at Pendle Council. *BBC*. Available at: <https://www.bbc.co.uk/news/uk-politics-44022663>.



Image 4: Burnley and Pendle bus

Explaining the Brexit vote in Pendle

Academic and media accounts of the Brexit vote have often focused on the 'left behind'

Working in precarious manufacturing and low-skilled jobs, these relatively deprived voters feel threatened by immigration and were motivated by the belief that no one listens to their concerns.¹⁷ Often described as the 'cul-de-sac' of Lancashire, Pendle's strong manufacturing economy, relatively deprived population and ethnic tensions appear on face value to fit the description of a 'left behind' community. This sections finds that immigration and a feeling of political disconnect were the primary vote drivers in Pendle. However, it also notes that the non-existence of any local Remain campaign may have exacerbated the extent of the Leave vote.

The most obvious driver of the Brexit vote in Pendle was immigration. Academic analysis has shown the Leave campaign's clear anti-immigration rhetoric was the most important argument they had in influencing voters.¹⁸ Indeed, the key projected benefits of leaving the EU for pro-Brexit voters were limiting immigration and reducing the risk of terrorism. While these sentiments were clearly felt in Pendle, this is curious as immigration from EU countries is low. Despite this, Councillor Joe Cooney argues that immigration from Eastern Europe has become more visible only recently with a 'proliferation of Eastern European shops'. But moreover, Cooney said that 'what people have told me is that they've kept the wages lower because they're prepared to work for a below living wage.' However, it was generally agreed by other interviewees that strong sentiments about Eastern European migrants are influenced by views about the Asian community.¹⁹ One Labour councillor, Wayne Blackburn,

said that people tended to believe the Asian community is bigger than it is, and that the problems of integration that reared up in the 2000s are still felt in the community today.²⁰ Interviewees tended to agree that Leave voters were aware that leaving the European Union would not change their relationship with the Asian community. However, the conflation of the two fits with broader understanding that immigration as an issue is often conflated with broader issues of identity.²¹

The other facet of this identity was a strong parochial pull within Pendle. Cooney reiterated that there is a strong local loyalty to the town, where residents of Colne feel that their interests are often overlooked by the larger Nelson.²² Building on this sentiment, Gordon Lishman, the Liberal Democrat candidate at the 2017 General Election, argued that 'people take pride in their work and feel that they have a long term commitment to their employer. They feel that this is reciprocated.'²³ But Lishman also noted that manufacturing had slowly declined and the creeping rise of short-term employment in call centres, like Daisy Group, had fostered a growing insecurity. Lishman later noted that this manifested in a lack of aspiration, 'the pervasive belief that there's no point.'²⁴ This parochial sentiment thus can be linked with the 'anti-politics' that academic accounts have found to exist more broadly. For instance, a study at the LSE Centre for Economic Performance (CEP) notes the popular view that EU membership only benefits elites,²⁵ while Clarke and Newman note the Leave movement's anti-expertise sentiments were often expressed in terms where experts were equated with elites.²⁶

17 Curtice J. 2017. Why Leave won the UK's EU referendum. *JCMS: Journal of Common Market Studies*. Vol 55 no S1.

18 Bruther and Harrison 2016; Curtice 2017.

19 Interviews with Wayne Blackburn, Labour Councillor on Pendle Borough Council, 30 May 2018; Tony Greaves, 25 May 2018; Gordon Lishman, 31 May 2018; and Dominic Collis, 30 May 2018.

20 Interview with Wayne Blackburn, 30 May 2018.

21 Swales K. 2016. *Understanding the Leave vote*. Natcen Social Research; Goodwin M. 2018. 'The perceived costs and benefits of Brexit'. In *The UK in a Changing Europe* (Ed.). *Brexit and Public Opinion*, pp. 24-27.

22 Interview with Joe Cooney, 1 June 2018.

23 Interview with Gordon Lishman, 31 May 2018.

24 Ibid.

25 Breinlich H., Dhingra S., Sampson T., and Van Reenan J. 2016. Who Bears the Pain? How the costs of Brexit would be distributed across income groups. *CEP Brexit Series: Paper No. 7*. Available at: <http://cep.lse.ac.uk/pubs/download/brexit07.pdf>.

26 Clarke J. and Newman J. 2017. People in this country have had enough of experts: Brexit and the paradoxes of populism. *Critical Policy Studies*, Vol 11, 1, pp 101-116.

In Pendle it is clear that voters feel the growing deprivation is a result of top-down decision making. The Brexit vote was treated as an opportunity to express the parochial sentiment that the area is capable of looking out for itself.

This sense of identity was clearly a major driver. It was so strong that there was a clear consensus across the interviews from all political persuasions that if there was a second referendum held today, Pendle's vote would be the same or even more strongly Leave. But what also came out of these interviews was a general sense that there was a lack of information supplied by the Leave campaign about what Brexit would actually mean for the area. And significantly, it was agreed that the Remain campaign was 'virtually non-existent'.²⁷ For instance, Lishman argued that 'the opportunities to campaign, particularly in relation to engineering exports, was simply not brought out. People in aerospace in particular, are strongly linked to BA and the European airbus, heard no argument about those things.'²⁸ Lishman continued that there is a sizeable population of professionals who may have been more inclined to support Remain if they had been presented with this sort of information. This sentiment was shared by most interviewees. While they agreed that this would not have swung the election, it is certainly plausible that the margin of the result in Pendle may have been slightly closer.

'...if there was a second referendum held today, Pendle's vote would be the same or even more strongly Leave.'



Image 5: Welcome to Laneshawbridge, Pendle, road-side sign

²⁷ Interview with Joe Cooney, 1 June 2018.

²⁸ Interview with Gordon Lishman, 31 May 2018.

Brexit effect

Pendle is an interesting case study in that while it voted strongly to Leave, as a community it does not seem to have much reliance on the EU.

As has been touched on in previous sections, Pendle has a low number of migrants from EU countries. Furthermore, local businesses have not reported to the council or to local development boards strong concerns over loss of demand in terms of trade within the EU.²⁹

This is not to say that Pendle is bereft of economic problems. It appears that a lack of access to financing and a skills shortage are the two major problems facing the region. These issues were acknowledged in almost every interview, with particular emphasis placed on the latter. There was not the same consensus as to the causes of this shortage. Pendle has a below average number of graduates with Level 4 or above skills qualifications.³⁰ When questioned as to why this skills gap existed, 28% of businesses in Burnley and Pendle stated that workers had not received appropriate training, while 24% said that employees lacked the required motivation to learn.³¹

On the one hand, some local stakeholders argued that the austerity policies of the last decade had created a clear decline in the funding of key services in education and health. Cuts to the national apprenticeship programme were cited by Councillors Blackburn and Greaves. Meanwhile, for Neil McInroy of the Centre for Local Economic Strategies, austerity had created a 'poverty premium' in which young people in underfunded communities like Pendle lacked aspiration as they could not see a viable economic future under current economic circumstances.³² Others have linked these problems to transport difficulties. Several interviewees described Pendle as a cul-de-sac where a lack of investment is tied to poor transport links.³³ The reported skills shortages are tied to an inability to retain

high-quality workers due to housing shortages. The lack of adequate transport and housing is a problem also outlined in the local authorities' economic development strategy.³⁴

While these problems are clearly the most pertinent for Pendle, it is also apparent that in the short term the uncertainty created by leaving the EU is unlikely to resolve the longstanding problems associated with a lack of financing and skills shortages.



Members of the Society of Motor Manufacturers and Traders who expect Brexit to have a negative impact on their businesses

Uncertainty for Pendle's manufacturing sector

While Britain has a low manufacturing base, academic accounts maintain that areas reliant on manufacturing will be some of the hardest hit by the UK's withdrawal from the European Union. In particular this will come as a result of negative trade consequences. An LSE CEP report measures trade effects through analysis of the share of regional GDP that is contained in trade flows between EU exporters and UK importers.³⁵ They find that UK regions are generally more exposed than EU27 counterparts. Moreover Lancashire is particularly exposed. The aforementioned report finds that 14-16% of its GDP can be affected by Brexit, with 39% of Lancashire's manufacturing base exposed to the trade effects of withdrawal.³⁶ This conforms with industry expectations, as 70% of members of the Society

29 Interview with Gordon Lishman, 31 May 2018.

30 Lancashire Enterprise Partnership. 2018. *The Burnley and Pendle Labour Market Intelligence Report*.

31 Ibid.

32 Interview with Neil McInroy, CEO Centre for Local Economic Strategy, 18 May 2018.

33 Interview with Dennis Mendros, 30 May 2018; Interview with Joe Cooney, 1 June 2018.

34 Pennine Lancashire. 2016. *Growth and Prosperity Plan*. Available at: https://www.burnley.gov.uk/sites/default/files/RPP_Pennine%20Lancashire%20Growth%20%20Prosperity%202016-32.pdf

35 Chen W., Los B., McCann P., Ortega-Argiles R., Thissen M. and van Oort F. 2018. The Continental Divide? Economic Exposure to Brexit in Regions and Countries on both sides of the Channel. *Papers in Regional Science*, Vol 97, 1, pp 25-54.

36 Ibid.

of Motor Manufacturers and Traders expect Brexit to have a negative impact on their businesses.³⁷

It is unclear to what extent Pendle will be impacted in this way. While it has a strong reliance on manufacturing, it specialises in the aerospace sector. Dennis Mendoros, former CEO of Euravia and the current chair of the Pendle Vision Board, says that compared to other aerospace industries, as in France, British aerospace is robust and has traditionally been more independent of government support.³⁸ The largest export market for the region is the USA, while China and the Middle East are also significant markets for Pendle's manufacturing sector.³⁹ Trade in these markets already operates under World Trade Organisation (WTO) rules, so on face value Brexit should not create added difficulties. Councillor Cooney, who holds the Finance portfolio on Pendle Borough Council and is also a member of Lancashire County Council, says that only one major local engineering firm has expressed concerns due to a reliance on trade within the EU.⁴⁰ Miranda Barker, the CEO of the East Lancashire Chamber of Commerce, reported that on the whole, local export manufacturing businesses are adaptable and are prepared for Brexit; however, they are waiting to see exactly what Brexit looks like.⁴¹

However, even for these firms, the impact Brexit could have on supply chains must be of some concern. For over 20 years UK trade with the EU has been based on the free movement of capital, labour, goods and services across their borders. Depending on the nature of the Brexit deal, these agreements are likely to be more difficult, which will create problems for business supply chains. In the aerospace sector, one component may be manufactured in France, and the end product may need to cross the UK-EU border several times before completion. Several business reports indicate that even under the softest possible Brexit in which the UK keeps almost all of its access to the single market, there are still likely to be limits on the free movement of labour, which will create employment issues.⁴² Any legislative change could increase taxes, create costs around import and export duties and lead to a rise in logistical lead time frames.⁴³



Image 6: Immigration is an important source of skills-sharing in the aerospace sector

In a high-profile statement, Airbus recently announced that it may move its entire UK operations offshore. Airbus cited the potential to lose up to €1bn a week if there is no frictionless trade agreement.⁴⁴ In their statement, Airbus said that 'the current planned transition is too short for the EU and UK government to agree the outstanding issues, and too short for Airbus to implement the required changes with its extensive supply chain.'⁴⁵ While Airbus does not operate in Pendle, this is reflective of thinking within the aerospace industry. Rolls Royce, whose hydraulic engine factory in Barnoldswick is one of Pendle's biggest employers, has reportedly considered a move to the

37 Dhingra et al. 2017. The Local Economic Effects of Brexit. *CEP Brexit Series: Paper no 10*. Available at: <http://cep.lse.ac.uk/pubs/download/brexit10.pdf>.

38 Interview with Dennis Mendoros, 30 May 2018.

39 Interview with Miranda Barker, CEO East Lancashire Chamber of Commerce, 28 June 2018.

40 Interview with Joe Cooney, 1 June 2018.

41 Interview with Miranda Barker, 28 June 2018.

42 PriceWaterhouseCoopers. 2017. Supply Chain: Your Brexit Comparative Advantage. *PWC Report*. February. Available at: <https://www.pwc.com/gx/en/issues/assets/brexit-supply-chain-paper.pdf>.

43 Ibid.

44 Odell M. 2018. Airbus Brexit warning alarms long supply chain. *Financial Times*. 22 June. Available at: <https://www.ft.com/content/e4109788-7635-11e8-b326-75a27d27ea5f>.

45 Airbus. 2018. Airbus provides update on impact of Brexit No Deal/Deal scenarios. *Airbus*. 21 June. Available at: <https://www.airbus.com/newsroom/press-releases/en/2018/06/airbus-provides-update-on-impact-of-brexit-no-deal-deal-scenario.html>.



European continent depending on the final Brexit deal.⁴⁶ And after citing the pound's post-Brexit plunge as a contributing factor to its £4.64 bn 2017 loss,⁴⁷ in April 2018 Rolls Royce announced that it would cut 162 jobs from the Barnoldswick factory.⁴⁸ While it is unclear if this decision was directly related to Brexit, it does reflect the prevailing economic climate where the potential impact leaving the EU will have on supply chain costs is a significant factor.

This is why Dennis Mendoros, who is relatively optimistic about the resilience of the local aerospace industry, argues that 'any barrier to trade is a negative influence. We cannot afford to have any barriers to trade... we should have a playing field in which we can operate freely.'⁴⁹ Mendoros explained that big companies like Rolls Royce will be the least badly affected as they have internal mechanisms to protect their exposure. However, as the margins

are so small, a relatively hard Brexit may mean that many of the smaller firms in Pendle, which are reliant on contract work from Rolls, would suffer.

This shows that while in the medium to long term, Pendle's resilient aerospace manufacturing sector may weather the Brexit storm, in the short term trade exposure and supply chains will create operating costs. This may lead to less investment in improving technologies in the local manufacturing economy, which could stymie future growth.

46 Tovey A. 2018. Rolls-Royce mulls European move as Brexit deal worries grow. *The Telegraph*. 23 April. Available at: <https://www.telegraph.co.uk/business/2018/04/23/rolls-royce-mulls-european-move-brexit-deal-worries-grow/>.

47 Jacobs B. 2017. Rolls-Royce's Barnoldswick plants crucial to future despite company's record loss. *The Lancashire Telegraph*. 15 February. Available at: http://www.lancashiretelegraph.co.uk/news/15093858.Rolls-Royce__s_Barnoldswick_plants_crucial_to_future_despite_company__s_record_loss/.

48 Collis D. 2018. Shock as Rolls Royce to shed 162 jobs at local plant. *Burnley Express*. Available at: <https://www.burnleyexpress.net/news/shock-as-rolls-royce-to-shed-162-jobs-at-local-plant-1-9114949>.

49 Interview with Dennis Mendoros, 30 May 2018.

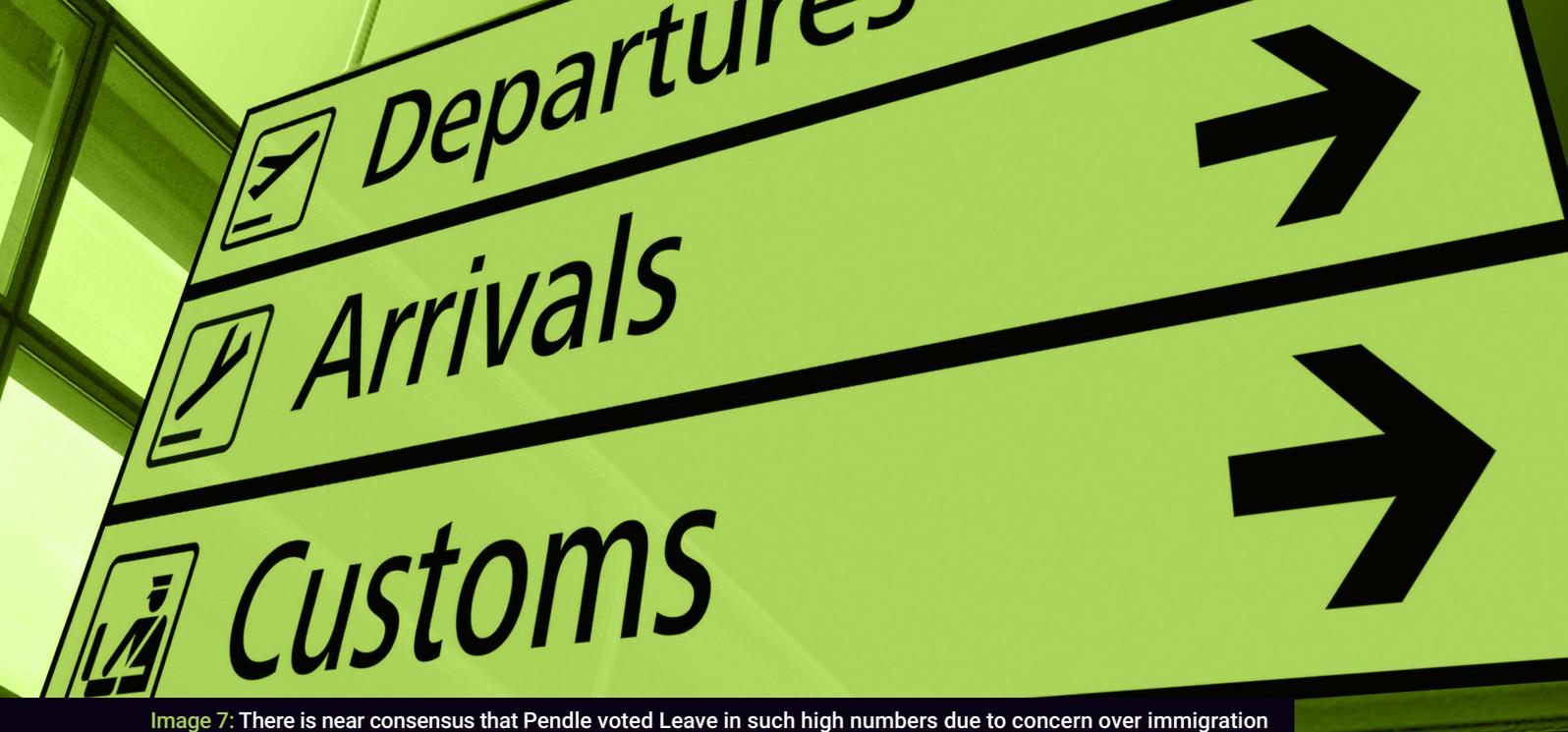


Image 7: There is near consensus that Pendle voted Leave in such high numbers due to concern over immigration

Immigration

As was outlined in a previous section, there was near consensus that the reason Pendle voted Leave in such high numbers was due to concern over immigration. While ethnic tensions with the Asian community were a part of this, so too was the perception that immigrants from Eastern Europe have driven down wages.⁵⁰ However, this is based on perception more than reality. For one, it is unlikely that the relatively low level of European immigration in Pendle could have had such a significant impact on overall wage levels. But at a more structural level, any effect immigration could have had on wages is likely made up for by immigrants' consumption of local goods and services, which in turn fuels more employment opportunities.⁵¹ Immigrants from Europe also pay a higher share in taxes than they are able to receive from any government welfare services.⁵² This is not to say that wages have not decreased and joblessness has not increased; however, the falls in wages began after the 2008 financial crisis and are tied to a slow economic recovery.⁵³ Given that EU-born migrants make up just 2.1% of Pendle's population, austerity is likely a more significant impact on wages and joblessness than immigration.⁵⁴ In this area of immigration, Brexit is not likely to have any effect – however, if the small number of existing migrants were to leave the UK, this could create a small number of low-skilled job openings.

One issue that is not often considered is that immigration has been an important source of skills-sharing in the aerospace sector. Miranda Barker detailed that there is a shortage of skilled engineers and a general shortage of economically active people in East Lancashire, some areas being at full employment.⁵⁵ Barker also stated that firms that have a high percentage of skilled European workers are concerned by what Brexit may mean.⁵⁶ Dennis Mendoros found that immigrants from within and outside the EU were highly complementary to the success of Euravia as he said that 'without them, we would not have achieved what we were able to.'⁵⁷ Furthermore, Mendoros expressed concern that limiting cooperation with European universities and research centres would further prevent short- and long-term opportunities for skills-sharing.⁵⁸ Given Pendle's current problems developing and retaining skilled workers, the likely limits on free movement of labour will likely exacerbate this problem. It is one thing to train local employees, but given the current austerity-related problems, immigration from the EU provides a soft sharing option that may not diminish.

Uncertainty limits economic growth

A consistent theme raised across the interviews was the short-term problems arising out of the uncertainty surrounding the current Brexit negotiations. In reiterating the resilience and adaptability of the manufacturing sector, Miranda Barker

50 Interviews with Gordon Lishman, 31 May 2018; Tony Greaves, 25 May 2018.

51 Wadsworth et al. 2016.

52 Ibid.

53 Ibid.

54 Interview with Neil McInroy, 18 May 2018.

55 Interview with Miranda Barker, 28 June 2018.

56 Ibid.

57 Interview with Dennis Mendoros, 30 May 2018.

58 Ibid.

said that the most significant problem it faced regarding Brexit was the uncertainty and lack of reassurance or a strong position being provided by the government.⁵⁹ Effectively, the inability of the UK government to provide a clear preferred outcome has created a more cautious business environment. In Pendle, small businesses account for 90% of employment. Andrew Leeming, the Programme Manager for Boost Business Lancashire, a public organisation that works with small business to enable their growth, says that 'we know businesses are unknowing as to what life looks and feels like when we come to leave the EU. We can plan for change but need to start changing. This is creating a lack of growth.'⁶⁰

What this shows then is that there is an immediate problem arising out of the state of the Brexit negotiations. Businesses that are in a more cautious mindset are not seizing current opportunities for growth, which in turn is preventing an injection of fresh investment into local communities. While this problem will obviously be ameliorated in the coming months as what Brexit entails becomes clearer, the effects of current low growth may be significant.

Funding local economic development under Brexit

As the previous section demonstrated, Pendle's economy has longstanding issues in terms of skills and investment. While Britain's withdrawal from the EU is not directly related to these problems, it is unlikely to provide short- or medium-term relief. This is further made clear in terms of the availability of European funds to facilitate local economic development.

The 2014 – 2020 European Structural and Investment Funds Growth Programme (ESIF) is important for local economic development. It combines funding from the European Regional Development Fund (ERDF), European Social Fund (ESF) and the Devolved elements of the European Agricultural Fund for Rural Development (EAFRD). These funds have been drawn on in Pendle. For instance, Boost Growth for Lancashire has secured £3.8 million until 2020.⁶¹ While this funding is complemented by other national and local governmental sources, it is important for Boost's capacity to provide tailored business advice and assistance to help small and medium businesses in Lancashire

develop. For reference, from 2016-2018, Boost assisted 46 enterprises in Pendle, which in turn helped to create 49.84 jobs.⁶² Likewise, the Lancashire Skills and Employment Hub, receives ESF funds.⁶³ These funds are specifically oriented at promoting social inclusion, sustainable employment, labour market mobility and skills for growth. Andrew Leeming acknowledged that ESIF funding is far from straightforward nor without its problems; however, he confirmed that it has been hugely important in ensuring the business assistance that Boost is able to provide.⁶⁴ To this end, the current round of ESIF has been of direct assistance to the investment problems and skills shortages that Pendle currently faces.

An argument can be made that in terms of local economic development, Brexit is unlikely to change very much. Indeed, all current ESIF funding is confirmed through to 2020, regardless of the type of Brexit that is negotiated. Councillor Joe Cooney argued that in terms of projects managed by Pendle Borough Council, the Council has stopped making applications due to burdensome regulatory requirements.⁶⁵ Cooney also added that the programmatic limitations on what European funds can actually be used for has meant that projects that did draw on ERDF funds, such as the redevelopment of the Nelson town centre, had often been unpopular.⁶⁶

However, comments from Andrew Leeming as well as Dennis Mendoros, who has served on local economic development boards including Pendle Vision and the Lancashire Enterprise Partnership, emphasise the importance of ESIF funds.⁶⁷ Furthermore, Britain's role as a principal partner in the EU defence project has meant the national aerospace manufacturing sector has benefited from EU Defence Research and Development programme grants, which could be denied to British companies post-Brexit.⁶⁸ Both Andrew Leeming and Dennis Mendoros expressed concern over the lack of national government assurances around replacing European funds.⁶⁹ Dennis Mendoros stated that, 'for the time being we have not seen any indication of a firm commitment that the government will replace the funding with something else that has a meaningful substitution to the lack of tomorrow's European funding.' On top of this, local councillors have reiterated the dire financial position of the Pendle Borough Council, meaning it would be hard-pressed to contribute more than it already does.

59 Interview with Miranda Barker, 28 June 2018.

60 Interview with Andrew Leeming, Senior Programme Manager for Boost Growth Lancashire.

61 See <https://www.boostbusinesslancashire.co.uk/case-studies/business-start-up-funding-support/>.

62 Information from internal reports provided by Boost.

63 See <https://www.lancshireskillshub.co.uk/about-us/esf-overview/>

64 Interview with Andrew Leeming.

65 Interview with Joe Cooney, 1 June 2018.

66 Ibid.

67 Interviews with Andrew Leeming; interview with Dennis Mendoros, 30 May 2018.

68 Deloitte. 2017. Impact of Brexit on the manufacturing industry: Aerospace & Defence. *Deloitte LLP*. Available at: <https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/manufacturing/deloitte-uk-brexit-ad-sheet.pdf>.

69 Interviews with Dennis Mendoros, 30 May 2018.

Recommendations and Challenges Ahead

This section shows that structural funds from the EU play an important role in servicing the existing problems of investment and skills shortages facing Pendle. It is unclear how and who will supplement these funds when the transition from the European Union is complete.

This report has shown that the major economic problems facing Pendle are a lack of financing and skills shortages. These are longstanding problems that in some ways contribute to our understanding of why people voted for Brexit. Unfortunately for Pendle, it seems that in the short term Brexit is more likely to exacerbate than solve these problems. However, as Neil McInroy, Chief Executive of the Centre for Local Economic Strategy, puts it, 'in the absence of something there's always a positive.'⁷⁰ In the medium to long term, if Pendle follows certain policy pathways, it could make the most of Brexit. By way of conclusion, this section provides recommendations to the challenges identified in this report.

The skills shortage in Pendle appears to be the major economic challenge it faces. This has domestic sources in terms of the inability of Pendle to maintain locally-trained workers, who instead tend to move to Manchester or London, as well as difficulties surrounding the apprenticeship levy. However, some firms continue to rely on European workers. Given the domestic sources of the skills shortage, it is unclear how businesses in Pendle will cover any costs associated with the loss of European workers. This policy problem does not appear to have any immediate solution.

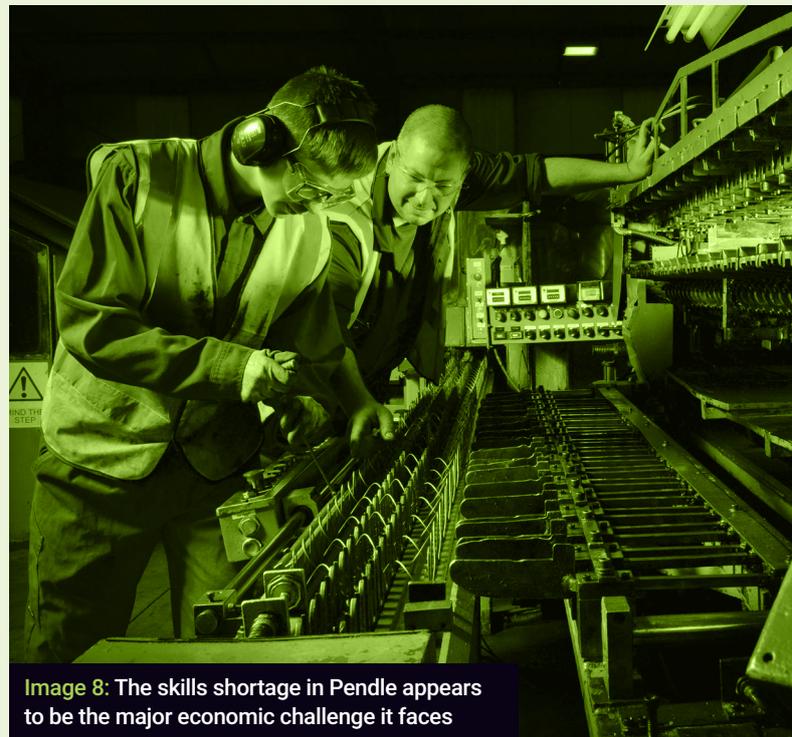


Image 8: The skills shortage in Pendle appears to be the major economic challenge it faces

However, there are more opportunities with regards to business financing. This report has shown that European funding sources have provided important support to businesses in Pendle. Andrew Leeming and Dennis Mendoros were optimistic that the national government would provide additional replacement funds for when access to ESIF expires after 2020.⁷¹ However, it is unclear exactly how the national government will be able to manage this within its current obligations and how it will change the current regulations behind ESIF funding. Yet, if the central government does provide replacement funds, then this could provide for a more flexible and tailored regulatory framework.

⁷⁰ Interview with Neil McInroy, 18 May 2018.

⁷¹ Interview with Andrew Leeming; interview with Dennis Mendoros, 30 May 2018.

Noting that businesses attempt to maximise their funding options available from existing European funding, Leeming establishes that under current regulations ERDF funding comes with a certain caveat as 'it takes a specific skill-set to manage a program that comes with the regulations that accompany European funding.'⁷² If Pendle were to diversify away from its economic reliance on manufacturing, retail is one sector in which local business could develop. However, under current European regulations business-to-consumer transactional enterprises struggle to comply with ERDF funding.⁷³ Traditionally, national funding programmes, like the Northern Powerhouse, have not had such strict regulatory measures. If – and this is where there is a caveat – sufficient national funding were to replace ERDF funding, it would provide an opportunity for programmes like Boost to assist a greater array of businesses than they are currently able.

Secondly, as Neil McInroy emphasise, less trade with the EU gives potential for local enterprise to service goods and the desires of local people. This is a point of optimism that was echoed by Andrew Leeming.⁷⁴ In particular, Brexit could create certain advantages around procurement and state aid. Under current EU law, national governments cannot prejudice in favour of local businesses or support key strategic businesses as it would be classified as unnecessary state intervention in the market. Neil McInroy argues that to this end, and with a relatively progressive government in power, Brexit can provide an opportunity for governments to more directly support locally-oriented organisations to develop in struggling regions like Pendle.⁷⁵

To this end, Brexit could provide an opportunity to better protect and diversify business in Pendle. However, this can only happen in the medium to long term and depends on the way Pendle recovers from the effect Brexit will have on Pendle's longstanding economic challenges.

72 Interview with Andrew Leeming.

73 Ibid.

74 Interviews with Dennis Mendoros, 30 May 2018; interview with Andrew Leeming.

75 Interview with Neil McInroy, 18 May 2018.



Appendix

Appendix 1: Sociodemographic/voting/economy

| Local Authority | Data source | Barnet | Ceredigion | Mansfield | Pendle | Southampton | Country | (countries included) |
|--|----------------------|--------|------------|-----------|--------|-------------|----------|----------------------|
| Electorate in Brexit referendum | Electoral Commission | 223467 | 53400 | 77624 | 64534 | 158171 | 46500001 | United Kingdom |
| Number of valid votes in Brexit referendum | Electoral Commission | 161033 | 39742 | 56344 | 45335 | 107665 | 33551983 | United Kingdom |
| Percentage voting remain in Brexit referendum | Electoral Commission | 62.2% | 54.6% | 29.1% | 36.9% | 46.2% | 48.1% | United Kingdom |
| Percentage voting leave in Brexit referendum | Electoral Commission | 37.8% | 45.4% | 70.9% | 63.2% | 53.8% | 51.9% | United Kingdom |
| CEP estimate for soft Brexit effect (% of GVA) | CEP | -1.5% | -1.2% | -1.4% | -1.2% | -1.2% | -1.3% | United Kingdom |
| CEP estimate for hard Brexit effect (% of GVA) | CEP | -2.2% | -1.5% | -2.0% | -1.4% | -1.9% | -2.7% | United Kingdom |
| Percentage of live births to mothers not born in the UK | ONS | 58.7% | 11.1% | 17.1% | 28.9% | 34.8% | 26.9% | United Kingdom |
| Percentage non-British | ONS | 20.8% | 4.0% | 7.6% | 6.7% | 19.7% | 9.3% | United Kingdom |
| Percentage non UK born | ONS | 39.0% | 6.7% | 8.6% | 8.9% | 22.9% | 14.1% | United Kingdom |
| Percentage born in UK, 2011 | 2011 Census | 61.1% | 94.0% | 94.4% | 89.1% | 82.4% | 86.6% | England and Wales |
| Percentage born in other EU countries, 2011 | 2011 Census | 10.4% | 2.6% | 3.5% | 2.3% | 6.7% | 4.3% | England and Wales |
| Percentage white UK born | APS | 45.5% | 92.5% | 86.8% | 80.4% | 74.8% | 79.7% | United Kingdom |
| Percentage white not UK born | APS | 19.4% | 4.4% | 6.2% | 4.7% | 11.8% | 6.8% | United Kingdom |
| Percentage ethnic minority UK born | APS | 17.2% | 0.9% | 2.0% | 6.4% | 3.8% | 6.5% | United Kingdom |
| Percentage ethnic minority not UK born | APS | 18.0% | 2.3% | 5.0% | 8.5% | 9.6% | 7.0% | United Kingdom |
| Employment share: Agriculture, forestry & fishing | BRES | 0.0% | 1.7% | 0.0% | 0.1% | 0.0% | 1.6% | Great Britain |
| Employment share: Mining, quarrying & utilities | BRES | 0.2% | 0.8% | 0.7% | 0.7% | 0.5% | 1.2% | Great Britain |
| Employment share: Manufacturing | BRES | 2.3% | 4.2% | 9.8% | 28.1% | 3.4% | 7.9% | Great Britain |
| Employment share: Construction | BRES | 6.1% | 5.8% | 7.3% | 4.7% | 3.0% | 4.7% | Great Britain |
| Employment share: Motor trades | BRES | 1.3% | 1.7% | 2.4% | 1.9% | 1.7% | 1.8% | Great Britain |
| Employment share: Wholesale | BRES | 3.0% | 2.0% | 4.3% | 3.9% | 2.6% | 3.9% | Great Britain |
| Employment share: Retail | BRES | 11.4% | 10.0% | 12.2% | 10.9% | 9.4% | 9.5% | Great Britain |
| Employment share: Transport & storage (inc postal) | BRES | 3.0% | 2.3% | 2.2% | 2.2% | 6.8% | 4.8% | Great Britain |
| Employment share: Accommodation & food services | BRES | 6.8% | 13.3% | 6.1% | 7.0% | 6.8% | 7.4% | Great Britain |
| Employment share: Information & communication | BRES | 4.5% | 1.3% | 1.5% | 3.9% | 6.0% | 4.1% | Great Britain |
| Employment share: Financial & insurance | BRES | 1.9% | 0.8% | 1.5% | 1.4% | 3.0% | 3.5% | Great Britain |
| Employment share: Property | BRES | 4.5% | 1.5% | 0.9% | 1.4% | 1.5% | 1.7% | Great Britain |
| Employment share: Professional, scientific & technical | BRES | 11.4% | 3.3% | 4.3% | 3.9% | 5.1% | 8.7% | Great Britain |
| Employment share: Business administration & support services | BRES | 8.3% | 2.0% | 12.2% | 4.7% | 12.0% | 8.8% | Great Britain |

| Local Authority | Data source | Barnet | Ceredigion | Mansfield | Pendle | Southampton | Country | (countries included) |
|--|-----------------------|----------|---------------|-----------|----------|-------------|----------------|----------------------|
| Employment share: Public administration & defence | BRES | 3.4% | 6.7% | 4.3% | 2.5% | 4.3% | 4.2% | Great Britain |
| Employment share: Education | BRES | 11.4% | 20.0% | 8.5% | 9.4% | 12.0% | 8.6% | Great Britain |
| Employment share: Health | BRES | 15.2% | 13.3% | 14.6% | 10.9% | 17.1% | 13.0% | Great Britain |
| Employment share: Arts, entertainment, recreation & other services | BRES | 5.3% | 5.0% | 4.3% | 2.5% | 3.8% | 4.6% | Great Britain |
| Percentage with NVQ level 4+, aged 16-64 | APS | 54.0% | 31.4% | 17.5% | 21.5% | 36.0% | 38.4% | United Kingdom |
| Percentage with no qualifications, aged 16-64 | APS | 5.5% | 7.6% | 11.2% | 9.1% | 7.4% | 8.0% | United Kingdom |
| Population, 2017 | APS | 389,700 | 74,800 | 105,800 | 89,700 | 250,900 | 65,114,500 | United Kingdom |
| Social Mobility Index (ranking out of 324) | Social Mobility Index | 9 | Not available | 315 | 144 | 247 | Not applicable | Not applicable |
| General Election 2015: Percentage Conservative | Electoral Commission | 49.5% | 11.0% | 28.2% | 47.2% | 39.7% | 36.8% | United Kingdom |
| General Election 2015: Percentage Labour | Electoral Commission | 38.4% | 9.7% | 39.4% | 34.9% | 19.1% | 30.4% | United Kingdom |
| General Election 2015: Percentage UKIP | Electoral Commission | 5.5% | 10.2% | 25.1% | 12.2% | 12.8% | 12.6% | United Kingdom |
| General Election 2015: Turnout | Electoral Commission | 68.0% | 69.0% | 60.9% | 68.8% | 63.4% | 66.4% | United Kingdom |
| General Election 2017: Percentage Conservative | Electoral Commission | 47.1% | 18.4% | 46.6% | 49.0% | 42.8% | 42.4% | United Kingdom |
| General Election 2017: Percentage Labour | Electoral Commission | 45.2% | 20.2% | 44.5% | 46.2% | 47.7% | 40.0% | United Kingdom |
| General Election 2017: Percentage UKIP | Electoral Commission | 0.6% | 1.5% | 5.3% | 0.0% | 1.0% | 1.8% | United Kingdom |
| General Election 2017: Turnout | Electoral Commission | 70.5% | 73.3% | 64.5% | 69.0% | 67.1% | 68.8% | United Kingdom |
| Price level, 2016 (regional, relative to UK index of 100) | ONS | 107.2 | 98.1 | 99.6 | 98.8 | 101.5 | 100.0 | United Kingdom |
| House price, 2017 (mean transaction price) | Land Registry | £691,914 | £224,337 | £148,961 | £114,441 | £268,534 | £345,715 | England and Wales |

Notes

Employment by ethnicity data is obtained from Nomis but is not included here due to space constraints

Electoral commission data for the EU referendum is available at <https://www.electoralcommission.org.uk/find-information-by-subject/elections-and-referendums/past-elections-and-referendums/eu-referendum/electorate-and-count-information>

The Centre for Economic Performance (CEP) paper is available at <http://cep.lse.ac.uk/pubs/download/brexit10.pdf>

The ONS migration data is available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithintheuk/datasets/localareamigrationindicatorsunitedkingdom>

Data from the Census, Annual Population Survey (APS), and Business Register and Employment Survey (BRES) are available at Noms: <https://www.nomisweb.co.uk/>

The Social Mobility Index is only available for England

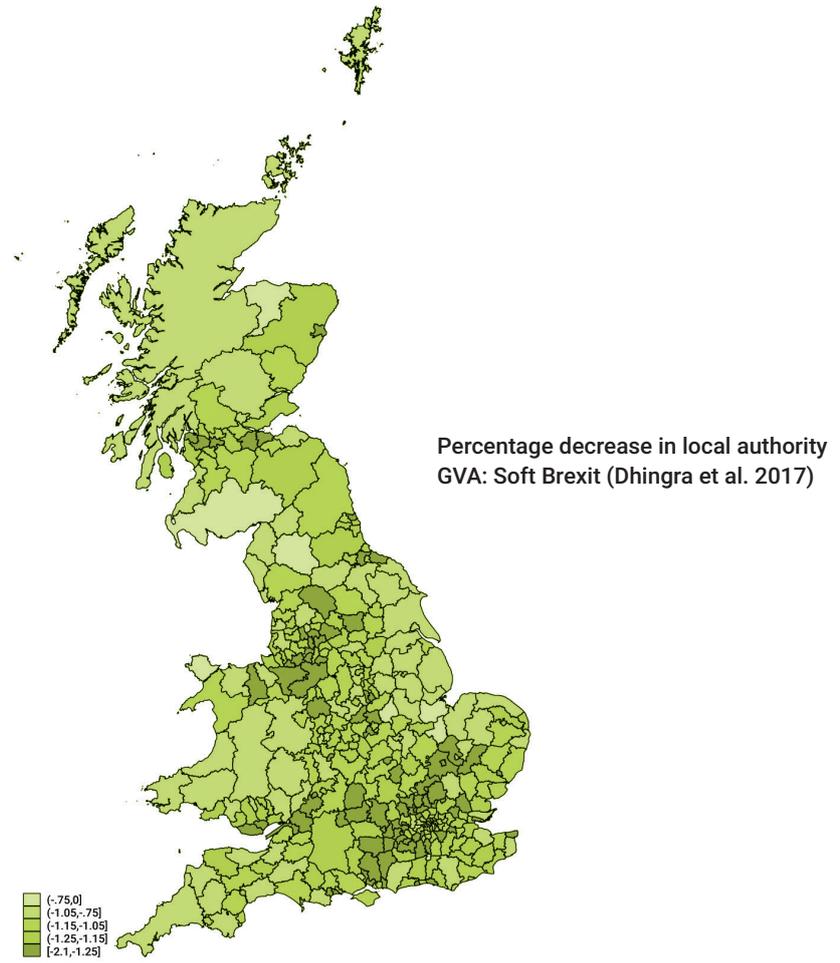
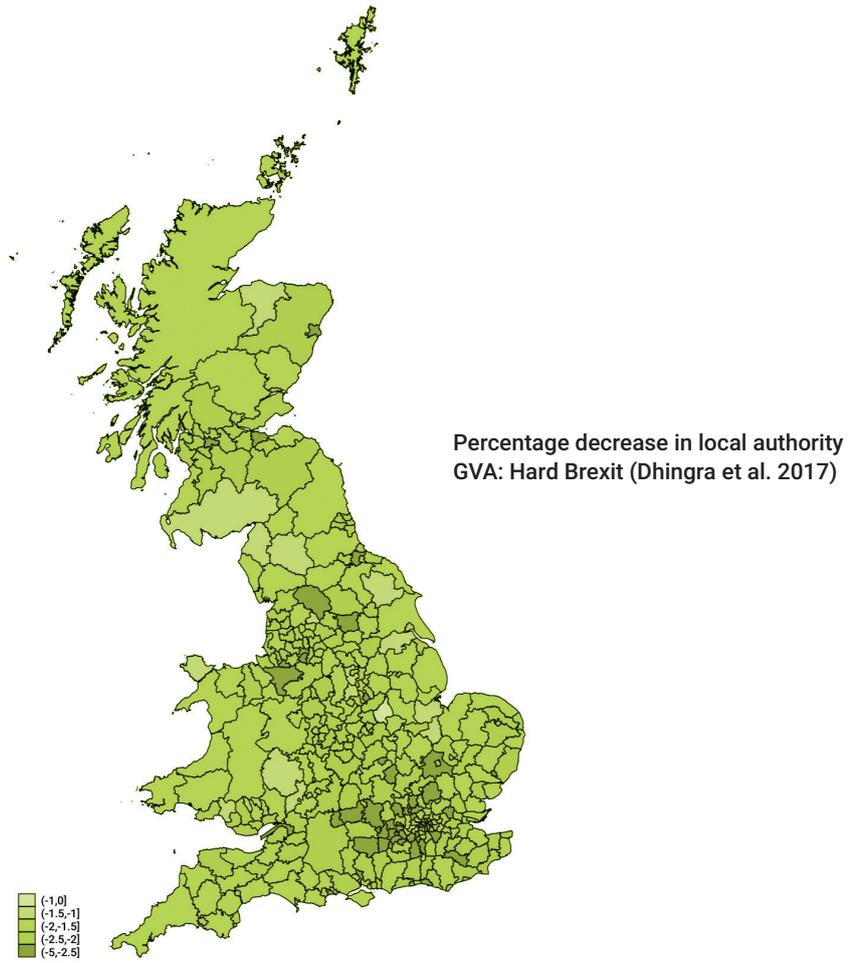
ONS regional price data is available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/articles/relative-regional-consumer-price-levels-uk/2016>

House Price data is available at: <https://www.gov.uk/government/statistical-data-sets/price-paid-data-downloads>

Electoral Commission data for the 2015 and 2017 general elections is available at: <https://www.electoralcommission.org.uk/our-work/our-research/electoral-data/electoral-data-files-and-reports>

General election voting data is available at the parliamentary constituency level whereas this project focuses on local authorities. We impute local authority level data by fitting constituencies into local authorities. For Ceredigion, Mansfield and Pendle, the parliamentary constituency is equivalent to the local authority. Barnet is a combination of three parliamentary constituencies, namely: Finchley and Golders Green, Hendon, and Chipping Barnet. For these four local authorities there is no issue in obtaining local authority level general election data. Southampton is constructed of two full constituencies - Test and Itchen - and part of the constituency Romsey and Southampton North. To obtain general election data for Southampton, we use the population-weighted mean of the general election results for these constituencies. This requires us to assume that the voting behaviour of voters in the section of Romsey and Southampton North that is in the local authority Southampton is equivalent to the proportion that is outside of Southampton local authority. We believe that this is a reasonable assumption. Further, it only affects a 11.9% of the Southampton population, so any induced error is likely to be relatively very small.

Appendix 2: Post Brexit percentage decrease in local authority



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