

Northern Economic Futures

Symposium on Economic
Development in the North of England
24-26 March 2010

Report of proceedings



SPONSORED BY

**Moving Forward:
The Northern Way**



Centre for
Urban & Regional
Development Studies
CURDS



Northern Economic Futures

The Northern Way has been working closely with the Spatial Economics Research Centre (SERC) on Northern Futures – a programme of research which aims to synthesise a wide ranging evidence base on the long term economic future of the North of England.

Northern Futures has brought together the work and the thinking of leading experts from academic, research and policy backgrounds alongside The Northern Way's own research outputs to consider the development issues facing the North of England and territories like it in the coming years.

The focus of the programme has been to better understand the long term underlying structural economic issues affecting the North, including the changed economic environment emerging as the global economy inches its way out of recession, and to provide the basis for identifying opportunities and challenges for economic development, and areas of focus for policy and practice in the North.

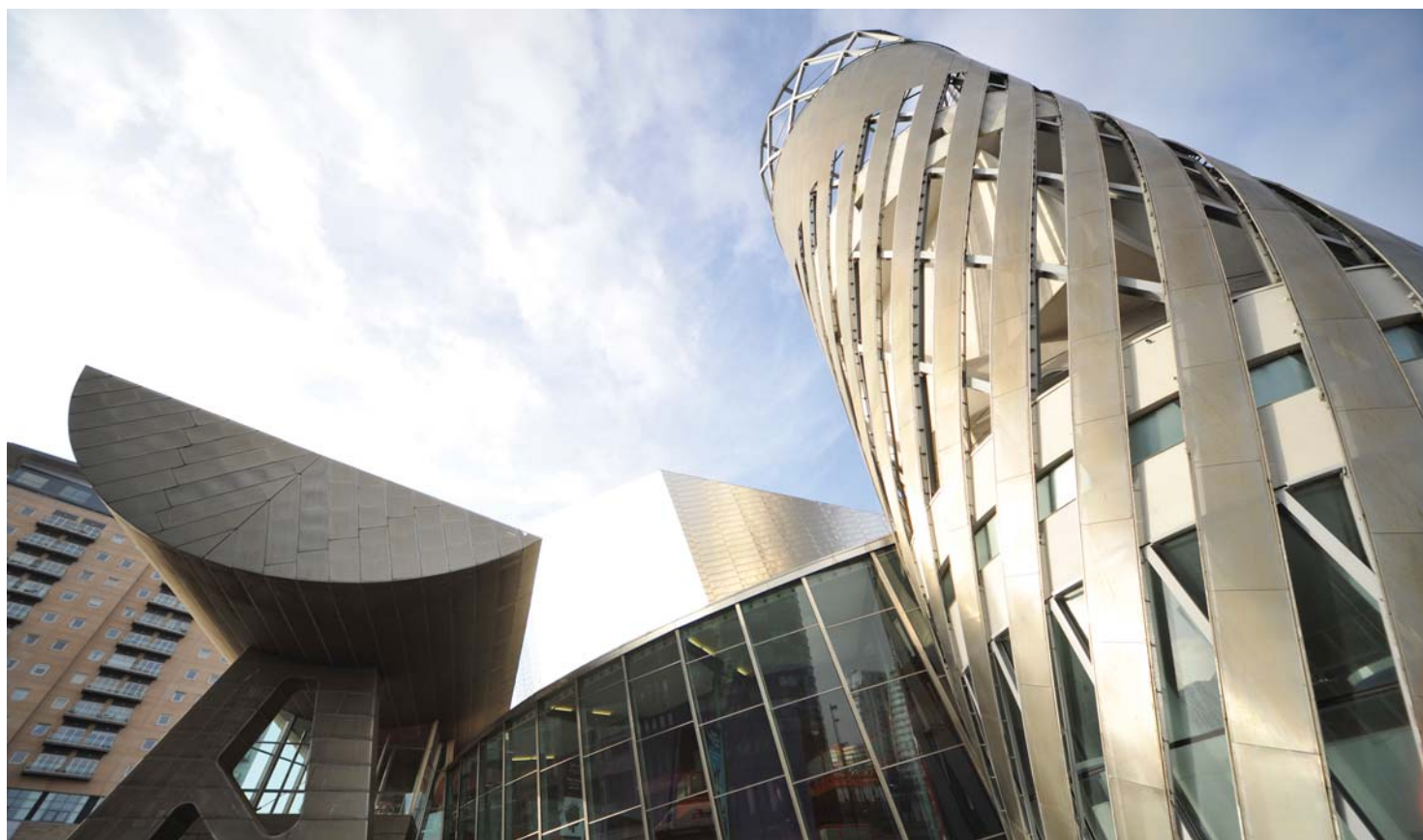
The Centre for Urban and Regional Development Studies (CURDS) at Newcastle University is co-ordinating the engagement of the Spatial Economics Research Centre (SERC) into this work programme.

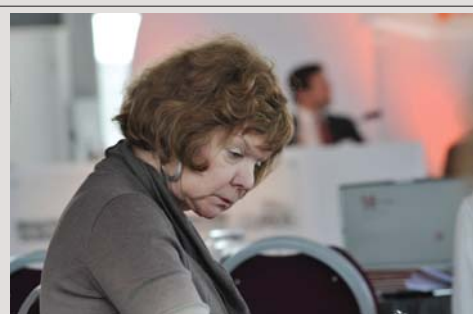
Working with SERC, The Northern Way hosted a major Symposium to contribute to this analysis in Manchester at Salford's Lowry Centre on the 24th, 25th and 26th March 2010. Chaired by The Northern Ways Senior Research Advisor, Professor Michael Parkinson, and animated by Professor John Tomaney, Director of CURDS, the event drew together participants from academia, national and international policy organisations and Northern Way partners from across the North of England.

This Focus North supplement, prepared by The Northern Way's Policy and Research Manager, **Richard Baker**, aims to summarise the outputs of the programme to date, and the discussion at the Symposium.

The supplement includes short summaries of the 12 papers which were presented at the symposium and articles by 5 of the participants who acted as key discussants at the event.

The full papers and other documents mentioned in this supplement are available for free download at www.thenorthernway.co.uk/northernfutures





Introduction

This is an exceptionally challenging moment to consider the future of the Northern economy.

During the past 15 years, development policy was largely delivered in a context of economic growth. As we emerge from a deep and difficult period of economic recession, we are still getting to grips with the 'new normal'.

There is general recognition that the post-recessionary economic environment will not, and should not, imply simply settling into the ways of the past, even were this to be possible. There is an emerging consensus that our economic future should be more balanced – sectorally and spatially – sustainable, and built on stronger long term foundations.

But the full shape of the economic change we are facing nationally, and within the North of England, is not yet clear and the longer-term impacts of the recession will only emerge over time. At the same time, there is considerable change underway in the approach of Government to economic development, and in the scale and shape of the institutions in place to support it.

Northern Futures looks broadly at the economic environment which will shape the future of the North and its constituent economies over the long term. The hypothesis which has underpinned the work programme is that, together with the rest of the world, the North is confronting a series of linked 'Turning Points'

The post-recessionary economic environment – including the restructuring of the financial system and cuts in spending which it is triggering in the UK and elsewhere – is a key driver. But alongside there are others; climate change and resource pressures, demographic change, accelerating technological change and the development of the knowledge economy, and geopolitical changes that will reshape relationships between continents, countries, regions and cities.

The Northern Futures programme has aimed to assemble and synthesise a cross-cutting evidence base about these changes and about their impacts for the North, and to offer an opportunity for discussion and reflection on the position of the North in responding to them. In so doing it seeks to draw from the various strands of academic thought which are guiding researchers into these issues.

The Northern Futures Papers

Through Northern Futures, CURDS, SERC and the Northern Way have invited some of the leading thinkers in urban and regional development research to work with partners from the North of England on our response to these issues – by commissioning, publishing and debating two sets of key papers (see box 1). The products of this phase of the work are reported in this supplement. A fuller synthesis of this and other work will also be produced early in 2011.

There are two sets of papers:

The 'Turning Points' papers provide an overview of the main external trends and

issues, and their impacts. They aim to consider how these Turning Points will affect sub-national economic development processes in future, and reflect on the implications for the North of England and places like it.

The second set of papers address priority policy issues for the North of England itself. They address key drivers of growth and productivity – innovation, labour markets, connectivity and investment – as well as 'contexts and legacies' – land use and the built environment, place diversity, and governance frameworks. They review the current state of development of these drivers in the North, and reflect on the impact of the Turning Points.

The Turning Points Papers

Turning Points

Globalisation and Change: Impact on Regional and Local Development Strategies – Professor Andres Rodriguez-Pose and Sylvia Tijmstra, London School of Economics;

The Global Financial Crisis and the prospects for the North – Professor John Tomaney, Newcastle University;

Demographic Change and its impact on the Northern regions – Professor Phil Rees and Dr Peter Boden – University of Leeds;

Climate Change, Resource Pressures and the Future for Regional Development Policies – Professor David Gibbs, University of Hull;

Digital Technologies and the Knowledge Economy; Implications for policy in the North of England – Dr Randal Richardson, University of Newcastle

Drivers of growth and productivity
Innovation in the North of England: Drivers, Progress and Prospects – Dr Beth Perry, University of Salford;

Economic Strategy, Investment and Infrastructure – Andrew Lewis, Director, The Northern Way;

Connectivity and the North of England – Professor Alan Harding, University of Manchester;

Labour Markets, Trends and Issues: Challenges facing the North of England – Anne Green, University of Warwick

Contexts and legacies

Land Use: The Built and Natural Environment – An Overview of Trends and Drivers to 2050 – Professor Mark Tewdwr-Jones, University College London;

Diverse Places, Diverse Responses – Professor Mike Coombes, Newcastle University;

The Governance of Economic Development in Northern England – Professor Andy Pike, Newcastle University



Session1

Turning Points— Globalisation and the impact of the global financial crisis

Globalisation and Change: Impact on Regional and Local Development

Professor Andres Rodriguez-Pose and Sylvia Tijmstra, London School of Economics

Through a review of evidence from across the world, Andres Rodriguez Pose and Sylvia Tijmstra present evidence about the nature of economic globalisation and its impact at the sub-national level.

The paper traces the growth of international trade in goods and services and highlights increasingly globalised trends in investment decision making. Business organisations are sourcing resources and productive capacity across the world, with location decisions driven by judgements about the inherent capacities of places in terms of their natural assets and skills, and their capacity to respond to support the developmental requirements of the business.

This creates opportunities to secure investment into local and regional assets, but also creates risks and threats from rounds of rationalisation and competition on a worldwide scale. Competitive pressures have accelerated over time and reduced transport costs mean that places are finding investment more 'slippery'.

A key impact of these globalisation trends for territories like the North has been an increasing trend to economic disparities. Places with stronger knowledge bases, assets and capacities have benefited from being at the higher end of the value-chain, providing a magnet for higher levels of growth and investment. Low skill, low asset regions have been challenged by globalisation and some have experienced decline, divestment and population outflow. The paper makes a key observation about the positive correlation between urbanisation and wealth, with cities which have been able to grow and improve productivity enjoying better economic prospects.

In this increasingly complex environment, the paper argues that to be effective, economic policy making needs to be responsive to differentiated sub-national development opportunities. Regional and local scales are more flexible, and more able to root 'economic activity in the local social and economic fabric', than national strategy-making can facilitate. They can assess and respond to investment opportunities, and can build local indigenous capacity

The paper presents evidence that,



across the world, this was a recognisable trend, and that the response to globalisation had included significant decentralisation from the national scale. Only 2 out of the 42 countries studied were not pursuing decentralisation and the UK – one of the most centralised states in his sample – was experiencing higher levels of inequality than elsewhere.

The paper describes how new territorial structures are emerging in different places, enabling responses to be effectively calibrated to local and regional circumstances and offers practical examples of these developments.

The Global financial Crisis and the prospects for the North

Professor John Tomaney, Newcastle University

John Tomaney traces the development of the global financial crisis and its particular impact on the UK.

He recounts how the roots of the crisis which occurred between 2007 and 2009 were in the exposure of the international banking system to risky lending practices within the United States. However, he traces a longer history to the crisis, locating the particular incidence within a wider set of developments, including both the extension of the world trading system to Russia, China and India and the capital flows which were a key feature of these developments, and a longer history of turbulence within the financial services sector dating back to the 1980s.

The paper argues that the UK had a particular, and unique experience of the crisis, because of the structure and spatial distribution of the economy. An economy with a high dependence on financial services as its key growth sector – a 'monocrop' – and with a substantial focusing of this sector around London, with one or two secondary centres connected to it. As this key sector faced the challenges created by the crisis, the rest of the economy experienced a knock on impact with long term development implications across the UK, resulting in wider industrial change and a scarcity of investment.

Prior to the crisis, the UK economy had, on aggregate, boomed. Growth was, however, concentrated around London and the South East because of the economic geography of the financial services sector. Between 1980 and 1997, London gained a 22% cumulative growth advantage over the North East and North West,



and this increased to 30% by 2007.

However, despite this concentration, the impact of the recession hit the North and Midlands because of the dependency of the rest of the economy on this key sector for investment and for credit. Recovery is slow, despite the repairing of the financial services sector, supported by Government intervention, and the prognosis for the regions and cities, such as much of the North, very dependent on public sector activity is challenging. The paper reflects on evidence generated by the Northern Way Private Investment Commission on the impact on the range of investment mechanisms which had powered the Northern economy.

The paper suggests that future development in the North will be driven by a different agenda built on 'the emergence of a more diversified economy. Whilst the financial services sector will remain central to the British economy, it needs to be reformed and refocused and the agenda for the North of England would be built on a distinctive approach to its development, seeking out and exploiting key assets, within the context of change in the national economy. The North should play a key role in a move away from a reliance on financial and business services to a more diversified position including high value manufacturing and a distinctive response to climate change and this response should be conceived and delivered within the context of a globalised economic model.

Session1

Turning Points— Globalisation and the impact of the global financial crisis

Response

The Context for Economic Development Potential in the North

Professor Susan Christopherson, Cornell
University

The current economic crisis provides us with an unusual opportunity to take a fresh look at how success, failure, and long-term resilience in sub-national economies have been imagined, and to raise questions about how regional policy makers should think about “globalisation”. As John Tomaney notes, the debate about the impact of the global financial crisis – and potential responses to it – needs to be informed by an understanding of the particular character of the UK financial system and its relationship with the regional and local economies. In important ways, the global economic crisis has illuminated the limitations of the past formulas we were given for regional success. The papers and discussion in this session contributed to our evolving understanding of the relationship of the local and the regional to the global economy. Both papers and discussion raised issues in two areas critical to the economic future of the North:

- 1) What does the new phase of globalisation, significantly shaped by multi-national enterprises and financial strategies, mean for former manufacturing regions?
- 2) What are pluses and minuses of devolution as a strategy to enable localities and regions to respond more effectively to the global economy?

What does the new phase of globalisation mean for sub-national economies?

The papers and symposium presentations reinforced our understanding of globalisation as evolving and changing, shaped by powerful actors, regulatory mechanisms, and the strategies of multi-national enterprises.

Rooted in expanded markets and closer communication, transportation and cultural connections, globalisation has constructed a more differentiated investment environment.

As a result of changes in regulatory policy and heightened competition for inward investment and intellectual property, this environment has significantly altered since the 1990s. Arguably the recent emphasis on investment returns (from speculative real estate ventures, for example) has contributed to the global “meltdown” we are now experiencing. It

has also decreased the possibility of capturing mobile international investment capital for sub-national economic development purposes.

As Tomaney suggested, we have begun to recognise that a fuller understanding of regional potential and policy options needs to take account of the overall financialisation of the global economy (Pike and Pollard, 2009), the impacts of which have been particularly prominent in the UK and US, with critical implications for investment and disinvestment in former manufacturing regions (Epstein, 2004; Milberg and Winkler 2010).

Financialisation affected the ability of UK and US manufacturing regions to attract or build on foreign direct investment. Reliance on tax strategies to attract capital investment, for example, obscured the degree to which capital investment was a response to real input costs, including labor costs. Analysts of the forces behind the “decentering” of production networks in response to financial options presented in the period leading up to the global financial crisis have, in fact, noted the increasingly problematic and complex connections between place and profit.

According to Desai (2009:1289) for example

“In the increasingly non-transparent tax-efficient production networks of global corporations, it can be quite challenging to clarify the extent to which locations benefit from the activities they carry out”.

Certainly the emergence of more autonomous sub-national economies has expanded the alternatives available to enterprises looking for unconventional sources of profit in a complex global economy (Andres-Pose and Tijmstra, 2010).

What this suggests is that global competition for inward investment is less explicable as a consequence of input cost comparisons (including labor cost) or skill premia. And, what on the surface may look like “a good deal” in economic development terms, may turn out to have negative long-term consequences for national or sub-national economic development. Calculated location decisions by multi-national enterprises may, in fact, undercut the opportunities for lagging places to benefit from trade in such a way that economic development can occur. In some central and eastern European countries, for example, off-shoring by multi-national enterprises looking for sources of skilled labor (in computer programming, for example) has reduced the possibilities for entrepreneurship and the development of agglomeration economies based on a distinctive set of regional skills.

Given this decentering of both supply chains and financial assets, how do we think about devolution, which has been presented as a mechanism to empower localities and regions to act strategically to improve their economic fortunes in a global economy.

What are the positives and negative effects of devolution?

Devolution has both positive and negative consequences for cities, regions and nations.

On the positive side, national support for development agencies and broader co-ordinating bodies such as The Northern Way has provided regions with investment resources as well as analytical capacity. These resources and capacity increase the possibility that sub-national policy makers will focus on local strategic assets in building their economic base. For strong, rich, sub-national economies, such as Lombardy and Catalonia, devolution potentially enhances the ability to move strategically in a highly competitive global economy.

For lagging regions, particularly those left out of the financial investment boom of the 2000s, devolution can be a more problematic proposition. Resource poverty frequently means a lack of capacity to devise bottom up policy measures, creating further disadvantage in a policy regime that relies primarily on bottom up responses to global trends. Bottom up approaches also frequently rely on cost-based competition with other places rather than strategies to identify and build on comparative advantages.

There is a key question about the rhetoric and reality of devolution. A key issue is the scope to act. While responsibility and accountability for economic development and social welfare are easily shifted to the sub-national scale, it has to date been only in the unusual case (such as Lombardy in Italy) that the region has also been able to exercise control over key resources, such as higher education institutions or labor law, to give effect to this responsibility. Even given the critical role of energy in regional economies, national policies prevent the development of independent municipal energy structures. Thus, in the ways that really count, capacity to innovate in the policy arena can be actually quite limited.

As Jose-Enrique Garcilazo suggested in his commentary, all regions have the potential to develop strategies to respond to the economic challenges that they face. That potential will not emerge, however, from a reactive response to the conditions presented to the region but from the ability to control and use strategic resources. Although we have examples of this kind of strategic control and action, they are rare because they require ceding power over critical resources, which are perceived as national as well as regional assets.

Session 2

Turning Points— Demographic change, climate change and technological change

Demographic Change and its impact on the Northern regions

Professor Philip Rees and Dr Peter Boden,
University of Leeds

Philip Rees and Peter Boden highlight how the impact of key demographic developments, common across the world, are impacting upon the North of England.

Their review focuses on three key global demographic phenomena:

- population growth, as a result of enhanced longevity and higher birth rates
- population ageing, as a result of enhanced longevity and declining fertility and
- migration as people moved across continental, national and sub-national borders

They show how these trends interact differentially in the North, compared with other parts of the UK, and how different parts of the North are experiencing the trends differentially.

On aggregate, there is some limited natural population growth in the North. However, this is focused spatially around urban centres as a result of higher birth rates of minority communities. International migration growth is buttressing the Northern population, but this largely serves to compensate internal migration loss from the North within the UK, as people move to London and other parts of the country. The most significant trend for the North is that of ageing as life expectancy increases. This is particularly the case in the rural and suburban parts of the North.

The potential for these trends to have economic impacts can be seen in a number of areas of policy concern.

In terms of economic activity on the supply side of the economy, this implies an ageing labour force, with the main opportunity for growth in economic participation increasingly focused on older, and incoming migrant, population groups.

On the demand side of the economy there will be an increasing concentration of wealth and income in the older population, suggesting opportunities for innovation in business sectors aiming to service older consumers. But there are also risks, as the demands on public services and infrastructure will be increasingly focused on the older age groups. For the authors a key focus for policy will be work to ensure people remain healthy, therefore maximising their capacity to



contribute economically and socially.

For sub-national policy makers these changes imply a number of areas for focus:

- enhancing economic participation rates amongst over 50 and migrant populations to maintain capacity in the labour market
- ensuring that key infrastructure such as housing and transport reflect changing demands
- work to secure long term improvements in health to maintain the potential for economic activity and to minimise public sector costs

Climate Change, Resource Pressures and the Future for Regional Development Policies

Professor David Gibbs, University of Hull

David Gibbs identifies climate change as the most important challenge facing sub-national development in the 21st century. He suggests that it will require a sustained response throughout the whole century to reduce climate change pressures and to adapt the economy to a low carbon model.

He highlights that even were these changes to be successfully introduced, then there are already climatic changes in the pipeline as a consequence of current warming, and that these will be demanding in terms of risks from weather related events such as flooding and wider climate change impacts such as changing natural cycles. There is a need to pro-actively intervene to defend the economy, and adapt places and processes.

In his paper, he traces the development of research and policy discussion though the late 20th century and more recent history. He highlights how recent global discussions have set challenging targets for the reduction of carbon emissions which would be a significant driver to change.

Whilst international and national targets are challenging, they also have the potential to drive new opportunities in key areas such as energy generation, and there are key questions about the future of supply in areas such as food and water which will represent both opportunities and challenges for the North which has assets in both these areas. More widely, these targets imply changes to policy across the agenda from transport, to the design of business processes and the approach to housing and place development

He raises challenges for the sub-



national scale to successfully address the mitigation of climate effects and to adapt the economy in response to both low carbon imperatives and changing risks. He also promotes a co-ordinated move to the development of a low carbon economic future. Ensuring policy co-ordination, and mainstreaming climate change across the wider policy agenda will be required, but will be challenging given the level of achievements to date.

He also highlights a growing strand of thought which suggests that that these approaches would not be sufficient to get to grips with climate change. Some commentators are arguing that the challenge of climate change requires a reworking not only of the approach to development, but also to the objectives and goals.

Digital Technologies and the Knowledge Economy; Implications for policy in the North of England

Dr Ranald Richardson and Dr Emmanouil
Tranos, University of Newcastle

Ranald Richardson and Manolis Tranos explore how the development of a knowledge based economy—with economic value increasingly generated by exchanges of knowledge and ideas, rather than tangible goods—has affected thinking about economic development. He cites the increasing consensus that successful growth strategies would be focused on these sectors.

He highlights how the focus of sub-national strategies to promote the knowledge economy have tended to be on aspects of human, organisational and social capital rather than the infrastructure to enable successful adaptation to the knowledge economy. There was, until recently, a clear assumption that private investment would drive the development of network technologies.

However, he highlights how more recent discussion has recognised the importance of digital technologies as the dominant General Purpose Technology (GPT) in the knowledge economy, where a GPT is understood to be “a pervasive technology with numerous applications, whose performance and price continues to improve over time and which provides an underpinning platform for a proliferation of other technologies and applications”.

Analysts suggest that a small number of GPTs account for a large and increasing share of

Session 2

Turning Points – Demographic change, climate change and technological change Response

an economy's growth potential and that, in this context, a cutting edge digital infrastructure represents a pre-condition to successful economic development.

The authors propose that information and communications technologies (ICT) have achieved this position and that this is now a crucial infrastructure for the knowledge economy at all levels, under-pinning high value innovation, and providing a basic infrastructure for even some of the lowest value tasks. For the North, which aims to be increasingly competitive in the knowledge economy, there is a need to sustain a focus on both the digital infrastructure and the skills and organisational forms which can make best use of it. Beyond its economic applications, the author also highlights the increasing social importance of ICT in terms of, for example, public service provision and access to information and support.

They highlight a range of practical examples, from the UK and internationally, of strategies for securing this infrastructure within sub-national territories ranging from public-private partnerships, through to community, shared and linked networks.

To maximise the economic benefits to a place, key challenges are to promote the available capacity to potential users and investors, to ensure institutional integration around knowledge economy infrastructure, to ensure that expertise is linked across space and to ensure that key networks within the functional economy are established – between and across sectors – with shared availability and common access.

Demographic Change, Climate Change and Digital Technology

John Goddard, Emeritus Professor of Regional Development Studies, CURDS, Newcastle University

Demographic change, climate change and the evolution of the knowledge economy will be key factors influencing the development of the North.

Collectively they raise at least four generic and inter-related challenges for policy and research. first, how we think about the future; second the role of governance in shaping the future; third how different parts of the North are affected by each factor and finally how the

North mobilises its resources to meet the challenges in each domain.

In thinking about the future, we need to be able to consider the relationship between short run forecasts, and longer term scenarios, and we need the capacity to think across issues to recognise the inter-relationships between issues and trends.

For example, Rees and Bodens work on demographic change highlights the uncertainties inherent in population forecasting. This is especially the case with the migration component, but is also so with fertility and mortality. But we need to factor these trends into more wide-ranging scenarios given the inter-related nature of the Turning Points. For



Session 2

Turning Points— Demographic change, climate change and technological change Response

example, linking the context of migration to that of climate change there is the possibility of environmentally driven migration from southern Europe and from countries like Bangladesh to the UK as a result of weather events or sea-level rise. Unless these risks are successfully managed, given the pressures on land and services in the South East of England, the North could become a destination for international migrants.

As regards fertility, birth rates are higher in migrant populations. In relation to mortality the effects of obesity and medical technology improvements may counteract each other. These possibilities suggest that as we go beyond 2030 forecasting becomes more unreliable not least because of uncertainty around the possible geo-political, social, economic and environmental influences that might bear down on demographic change.

Climate change also enters into the scenarios realm where John Beddington, the Government's Chief Scientist has talked of a "perfect storm" of global population growth, energy and food shortages mixed in with global warming. The national Foresight report on the Future of Land Use sets out alternative scenarios about how land might be used in the UK in the light of alternative social, political and regulatory regimes which might apply globally, nationally and regionally.

So, key questions are:

- What are the possible alternative scenarios for the North in terms of population change and climate change?
- What are the alternative scenarios for the North in terms of the role of broad band infrastructure?
- What new policy parameters might emerge after 2030 in terms of, for example, a greater emphasis on a fairer and cleaner economy, well being and health?

The future of the North in the context of demography, adaptation to climate change and presence in the digital economy will depend critically on how the territorial dimension is embedded into each of these domains.

Many of the government departments concerned with key stages in the demographic cycle adopt policies which are territorially blind with delivery handed to single purpose agencies with a narrowly defined remit. Obvious examples are those dealing with the national border and

with equality. The work of departments like Work and Pensions and Health need to be more strongly linked to sub-national governance structures to enhance co-ordination around these issues. The same is true of those dealing with climate change and issues like energy, flooding and food security. And, at the sub-national level, where local authorities are left to try and draw these things together and cope with the consequences of population and climate change, the capacity to act can vary considerably between places.

This is particularly the case given the issue of sub regional variations in the North. For example the North exhibits,

- The concentration of migrant population in certain cities and the ageing population in rural areas.
- Local resource opportunities in terms of new and renewable energy.
- The urban/rural divide in digital infrastructure.

These raise important questions about the link between the demographic and environmental and digital drivers of change and the spatial structure of the North's settlement system. What are the assets of places in relation to these threats and opportunities?

To varying degrees, Northern institutions have been working to address the links between place, economic and environmental change. These issues were featuring in the emerging Integrated Regional Strategies and continue to be a focus for City Regions. In the current policy context, is there a challenge emerging to join up place based strategies across the North? To what extent are there complementarities between places within the North in the light of these challenges? How can technology support the comparative

advantage of different places—for example supporting upland communities providing new and renewable energy resources? How can river catchment areas be managed across the boundaries of the North to support the supply of water to a thirsty South?

Where population growth can occur is in part a matter of national planning policy relating to the release of land for housing in areas of demand, most notably in the greater South East. Yet this is the area which is under most severe threat from climate change. In contrast the North has a wide range of assets that could be mobilised to support more sustainable patterns of development provided the infrastructure is in place. The mobilisation of this potential could depend not only on local entrepreneurial responses but on the success of the regulatory environment. It will also require the mobilisation of intellectual and developmental resources to shape the future agenda. Research and co-ordination have key roles in thinking about and supporting public and political choices about the future of the North.

There is an important need to follow through this evidence base, with activities which can facilitate reflection on possible future scenarios for the North. The Foresight Land Use Futures scenarios offer a starting point for work of this nature, and it is important that such an endeavour builds on the firm academic evidence base provided through the Northern Futures papers. But it should also mobilise links the Northern Way has established at an institutional level with Northern universities, with Government and with Northern partners, including but not exclusively with the N8 consortium to ensure that the full knowledge base of the North's academic and research communities is more formally plugged into the development of the North.



Session 3

Drivers of growth and productivity

Innovation in the North of England: Drivers, Progress and Prospects

Dr Beth Perry, University of Salford

Beth Perry reviews evidence about the role of innovation as a driver of productivity and regional growth in the North of England.

She explores the dynamics which influenced its prominence in Northern economic development priorities, starting with the Government decision to relocate the Diamond Synchrotron from Daresbury in the North West to the South East at the turn of the century. This set back prompted an enhanced regional focus on science and innovation and the creation of the North West Regional Science Council, over time creating a wider agenda around the knowledge economy, and the recognition of the economic potential of agglomeration economies and economic spillovers.

In the North, the three regions have taken different innovation journeys. Support for collaboration between universities and business was the starting point for work in Yorkshire. In the North West, parallel science and innovation initiatives have been increasingly integrated into regional development strategies. Within the North East there has been a central role for innovation as the focus for its economic transition. These differences in approach reflected different economic starting points, varying dynamics and the centrality of existing assets and new opportunities.

A key moment for the North was the intervention of the OECD in 2008, with their territorial innovation review which was facilitated and informed by inputs from the Northern Way, the three Regional Development Agencies and a range of local, business and academic partners, engaged as part of an increasingly wide-ranging innovation constituency.

The OECD set out a comprehensive assessment of the innovation performance of the North of England and provided a strong rationale for collaborative work to:

- enhance the innovation infrastructure across the North
- broaden the understanding and agenda around innovation, to include broadening the interaction between innovation sites and local economies and
- enable innovation capacity, through the development of evidence, profile and focus.



She highlights how the innovation assets on which the North is now focused articulate strongly to the changing global economic environment reflected in the Turning Points papers, offering opportunities for the North in areas such as technological change with the focus on communications technologies, and climate change with the focus on low carbon energy generation.

Economic Strategy, Investment and Infrastructure

Andrew Lewis, Director, The Northern Way

Andrew Lewis describes how the economic and policy context for investment in the North of England has experienced significant change over the last 5 years. The impact of the recession has affected immediate prospects. It has also prompted a fundamental rethink of the terms on which investment is likely to be secured in the future as the economy recovers.

Before the recession the role of the public sector in delivering enhanced relative economic performance in the North had been under scrutiny, and this had been crystallised into a substantial recasting of the approach to regional economic development policy.

Recent reforms brought forward by the Labour Government focused on building a more coherent and accountable system of economic policy co-ordination between national, regional and local scales, alongside an attempt to break down policy silos between different instruments of economic policy. The direction of policy was towards simplification of structures and strategies, accompanied by an enhanced and positive role for local government. The reforms aimed to achieve a clear focus on the added value of the role of the public sector in economic development, providing an improved environment for private sector involvement and investment into key priority projects and programmes.

He argues that, for the North of England, changes of this nature are important because of the evidence which had been generated about the barriers to greater flows of private investment into the Northern economy.

The Private Investment Commission, which brought together 7 private sector leaders from different backgrounds, supported by The Northern Way, examined a range of constraints to private investment in the North – looking at investment into businesses, innovation, economic regeneration projects and housing.



They identified how key constraints had held back the Northern economy in key areas including:

- an under-supply of housing
- an imbalance of investment into regeneration and other infrastructure projects and
- an apparent inability of SMEs in the North to secure long term finance for growth.

Lewis highlights that the main focus of the Commission in seeking solutions to these constraints was on the fundamentals which would make a difference to these problems over the long term. However, he also highlights their significant concern about the nature and strength of recovery in the North.

The Commission identified a long term equity-gap between the Greater South East and the rest of the UK with the 32% of the UK business base based in the South East securing 69% of the venture capital investment. It assessed the evidence about the causes of this imbalance and developed a suite of potential responses. It agreed with the Rowlands Review that there needed to be action taken to promote and manage private investment opportunities into the regions outside the Greater South East and to move away from Government approaches which focus resources into areas where the economy was already strong.

He reports how the Commission also highlighted the need to address structural problems in areas like housing and regeneration which have been hidden by cyclical patterns in the market to address the overall attractiveness of the North for business and investment. This requires a coherent strategy and targeted local actions to maximise the potential of places, create a supportive local business environment and to develop new models of public-private partnership to encourage investment and to stimulate investment into projects which can connect communities to economic opportunities.

Connectivity and the North of England

Professor Alan Harding and Dr. James Rees, University of Manchester

Alan Harding and James Rees highlight how connectivity and accessibility have become increasingly crucial enablers of economic dynamism in a world dominated by urban economic development and agglomeration.

Session 3

Drivers of growth and productivity

Access to sea and air transport, or being positioned at a strategic point in a land-based transport system, have historically been key assets in supporting development. In an open economy, they continue to be crucial contributors to economic development prospects.

Good transport connectivity within local economic areas enables economic growth and the management of the congestion which accompanies it. And fast and efficient systems of transport between economic centres enable stronger economic interactions and dynamism. The importance of these physical connections seems to be undiminished in a knowledge economy, despite the increasing availability of modern information technologies. The importance of collaboration and networking between people and firms within knowledge economies means that these two forms of communication are complementary.

Harding highlights the extensive evidence base which had been developed about Northern transport priorities as a result of work developed by, or supported through the Northern Way, and the contribution it made to wider national work taken forward through the Eddington Review.

He suggests that this work has been pivotal in developing a strong understanding of the relationship between economic benefits and connectivity, and applying this to the specific circumstances of the North of England. It has encouraged a rigorous analysis of the connections between transport and processes of agglomeration and has enabled a more clear focus on the potential of key investments to unlock economic growth in the North. The list of priority investments which this work had identified, tested against productivity gains, has been increasingly recognised for its potential to not only improve the economic performance of the North, but also to add value to the wider UK economy.

There is an emerging consensus view that an increase in economic density in the North will lead to positive productivity changes, via agglomeration effects – and that this is particularly the case in those local and regional economies centres with a strong service sector focus, such as Leeds and Manchester,

For those centres with other economic profiles – such as the ports city regions and Towns with lower skills profiles arranged around City Regions the economic priorities with reference to transport are different.



For the former, the diversification of complementary economic sectors around the ports to take advantage of their position as gateways makes sense. For the latter, work towards a package of improvements around skills and quality of life, alongside better connectivity is required to secure positive outcomes. Without this improvement in the local economic profile, stronger connectivity could lead to the exacerbation of economic disparities. Work by SERC for The Northern Way has shown how it is possible that such connectivity can trigger positive economic development through restructuring although the evidence is not conclusive in this regard.

In the context of the response to the current recession with the challenge of securing capital investment, there is an opportunity for further work to align work to mobilise private sector investment to support the delivery of these key priority projects. There is also an opportunity to use the prioritisation methodologies to get a stronger focus on low carbon issues in the context of the increasingly important climate change policy driver.

Labour Markets, Trends and Issues: Challenges facing the North of England

Anne Green, University of Warwick

Anne Green reviews the key trends and issues facing the labour market in the North of England.

She highlights the increasing centrality of work to policy, both as a driver of economic development but also as a key part of the welfare reform agenda, with routes into work being positioned as the fast and effective route out of poverty. These two concerns continue to provide the rationale for a range of policy initiatives to promote employment, from incentives such as the national minimum wage, to support through New Deal programmes and with an increasing focus on mandatory participation in job support programmes.

She describes how the main programmes have focused on individual employees and job seekers, but also identifies how there have been more place oriented programmes operating at regional, local and neighbourhood scales to create conditions for economic and employment growth.

She reviews key contextual debates about employment – touching on the capacity of the Northern employment market to provide jobs, both in quantity and of quality. She



highlights how the position across the north in terms of quality and quantity is differentiated and how the difference in comparison with other parts of the UK continues to change. Over the decade to 2007 there was increasing job growth overall, but with a pattern of growth at both ends of the quality spectrum – in high value-added, high wage jobs and low value-added, low wage jobs. Regional differences in job quality were driven by occupational structure within sectors rather than differences in sectoral structure, and that for the North the role of the public sector is traditionally high compared with other parts of the UK.

She reviews evidence in other relevant areas such as employment conditions, job quality and occupational welfare, and argues that in a time of constraint, occupational welfare will be increasingly important both the quality of individual working lives and as a basis for competition in the labour market.

She discusses the increasing emphasis on skills in fostering competitiveness and economic performance, noting their impact on both productivity and inclusion. The skills present in a local or regional economy are crucial drivers to its performance and changes in skills governance aim to enable a stronger integration between economic and employment policy implementation.

In the final section of her paper she highlights a range of facts about the labour markets in the North highlighting the levels of economic activity and inactivity, the sectoral and occupational structures of employment and the value of outputs and productivity at Northern, regional and at city regional scales..

Finally she identifies a range of opportunities and challenges, linked to the long term trends explored in the Turning Points papers:

- The impact of budgetary constraint on jobs, particularly those in the public sector and those dependent on it
- The impact of demographic change with the impact of ageing leading to a focus on extending working lives and on short term measures to promote immigration
- The need to ensure that skills are updated to enable the north to address economic themes like the impact of technology and the offshoring of capacity
- The speed of economic change and the driver this creates for adaptability

Session 3

Drivers of growth and productivity

Response

Drivers of Economic Development

Lewis Dykstra, Deputy Head of the Economic and Quantitative Analysis Unit at the European Commission

Innovation, labour markets, public and private investments and connectivity all have a strong sub-national dimension and this is increasingly seen as an aspect that needs to be taken into account when designing policies and strategies to address economic development. As a result, the role of city regions in designing and implementing policies has grown in several European countries over the past two decades.

In addition, the coordination between different public policies can enhance the impact of these policies, and can ensure that unintended consequences and risks are managed. For example, whilst there are clear economic benefits from targeted transport investments, as highlighted by new economic geography thinking, improving transport links can also lead to an outflow of people and economic activities, the so-called leaking by linking. Policy coordination is key to ensure that transport investment leads to more economic growth and not less. For this coordination to work, however, a strong involvement, if not leadership, of the city region or other functional regions is required.

Innovation

The focus of innovation policy has shifted from a narrow focus on technology to a broader concept that includes non-technological and non-R&D based innovation, such as service innovation, better management, organisation and logistics. This shift has been accompanied by two other trends: an increasing use of partnerships and more decentralisation. Partnerships between the public and private sectors and researcher organisations promote an innovative milieu, where cooperation is easier and cross fertilisation happens faster. These partnerships are, however, difficult to establish at the national level. Therefore, many countries have developed innovation strategies that take into account the innovation strength and weaknesses of a region. The triple helix approach used in Sweden and Finland are excellent examples of this shift towards a more partnership-based and decentralised approach.

Investment

Co-ordination of different public and private investments can ensure a higher return. This



coordination needs to happen at multiple geographical levels. Large scale transport infrastructure investments are typically decided at the national level, which usually also finances the largest share of these investments. To ensure the maximum benefit of these investments, regional and urban economic development strategies need to anticipate these increases in accessibility.

The construction of a new high speed train link or the improvement of regional public transport connections can improve the economic development of an area. However, for this to work well a wide range of policies from planning, to training, to policies improving the business environment need to be coordinated. This type of coordination can only happen if the city region plays a strong role in the design and implementation of these policies. The role of the city region should not be limited to incorporating central government decisions about key investments. Their knowledge of the needs of the firms in their region and key bottlenecks can steer decisions to the areas with the highest return.

Labour Market

Policies addressing labour market issues have also moved towards a more participatory approach including employers, the public and the voluntary sector. This should allow for a better skills matching as compared to simple investments in the stock of human capital. Such an approach can promote the shift to a knowledge economy based on high value added activities and high skill jobs. The call for more flexibility and a more individualised approach has also led to a greater regionalisation and decentralisation with more discretion at lower levels of geography.

The main arguments in favour of this trend are (1) the different problems faced by regions may require different solutions, (2) a better knowledge of the local needs and opportunities can help to target policies and (3) a decentralised approach provides more opportunities for local buy-in as compared to a top down strategy. Nevertheless, to be efficient, such an approach should ensure a coherent, territory-wide strategy with a single programme of employer engagement.

Connectivity

Increasing critical economic mass by investing in better transport connections can enable a sub-national economy to become more



specialised and thus more productive, also offering benefits in terms of global competitiveness and resilience in the face of increased national and global competition. As a result, one can argue that increasing the connections within the North will allow it to find a more competitive niche in the global economy. Nevertheless, improved connections to London can also contribute higher economic growth if the balance between the cost and the quality of the business environment is favourable. Therefore, anticipating the high speed rail connection would require an upgrading of the business environment and continued investments in human capital. An efficient city-regional approach to planning could ensure a sufficient supply of high quality locations at a competitive price. This would significantly increase the appeal of the North as a competitive location for business investments.

Infrastructure investment decisions, however, should consider different scenarios in terms of the price of energy and greenhouse gas emissions. As transport infrastructure has a life span of multiple decades, it is quite possible that fossil fuels and/or greenhouse gas emissions will become considerably more expensive during that period. This could lead to a relative reduction in overall travel and a shift between short haul flights and high speed rail and between cars and public transport. Cost benefit analysis based on a single pricing scenario cannot capture the risks of far higher future fuel prices.

Session 4

Contexts and legacies

Land Use: The Built and Natural Environment – An Overview of Trends and Drivers to 2050

Professor Mark Tewdwr-Jones, University College London

Mark Tewdwr-Jones provides an analysis of trends and drivers of change as they effect land use in built and natural environments, drawing from evidence developed by the Government Office for Science Foresight Land Use Futures Project which had worked between 2008 and 2010 and reported in March 2010.

He highlights the crucial link between land use decisions and the shape and scope of economic activity, and how the development of land influences the well-being of individuals, as it shapes the living environment.

He identifies three key drivers of land use change to be:

- Population levels – population growth is anticipated to reach 71.1 million by 2031 implying additional demand for land and resources
- The changing economic environment, with levels of growth and affluence likely to drive changes in consumption, including for housing and leisure
- Changing environmental conditions – with big

questions about adaptation to climate change, and increasing pressure to live more sustainably affecting the demands on land

He focuses on a range of issues which feature in discussions about the sustainability of existing approaches to land use. Whilst many of these reflect historical and perceptual patterns, they are important in shaping consideration of land use issues. Given that land is such a crucial asset, understanding and addressing these issues will be important challenges.

- There appears to be a significant over-estimation of the level of development in the UK currently. He cited evidence that 20% of the population believe that over 75% of the land is developed, whereas the true figure is closer to 10%
- The balance of land use has remained largely the same over the last 50 years – with agriculture continuing to account for 70% of the land compared with 12% for woodland and 10% for urban, although he pointed out that the intensity had accelerated, and that there were some grounds for contesting of the statistics.
- That because of the combination of development and climate change impacts there are risk management issues to address. An increasing proportion of residential and business locations are vulnerable to events like flooding, whilst at the same time these risks will affect other functions which require land including water and food supply, and energy security
- That the balance of pressure and availability is geographically differentiated with significant pressures in the South East and opportunities in the North and Midlands for both business and residential development.
- That there are opportunities for more creative land use through stronger governance, more creative thought about multi-functionality of development (for example by investing in sustainable infrastructure) and proper valuing of the contribution of eco-system functions to the economy

Diverse Places, Diverse Responses

Professor Mike Coombes, Newcastle University

In his paper, Mike Coombes reflects on the diversity of the places within the economic geography of the North of England, and highlights that for each place its developmental history is a powerful factor in its response to change. This 'path dependency' implies that the potential for change will be realised over the long term, requiring a long term perspective in planning and economic development.

He also highlights how this spatial diversity challenges generalised approaches to policy. Differences in scale, character and socio-economic profile require differentiated approaches to intervention, and these are rarely constrained within localised or administrative areas meaning that the impact of externalities and spillovers will be crucial drivers of change within localities. In the context of economic development, he suggests that sub-regional economic areas are the scale of most interest as they reflect the flows and connections within the majority of business relationships and within the labour market.

Commentators have sought to develop typologies which can make some sense of the generic interventions which can provoke growth and development. Whilst this is difficult in such a diverse geography some have been proposed. From an economic point of view, the dominance of regional centres such as Manchester, Leeds and Newcastle is crucial in driving growth in both the core of the functional economy, and those places which surround it who can benefit directly and indirectly from the development of the core. But there are also other characterisations available, including more constrained cities who are not growing as quickly as their peers, and who play a different role in the wider economy.

And then there are free-standing places such as York, Chester and Darlington where they maintain differentially successful economies, with the key factor influencing their successful development being the level of development of inherent skills and capabilities, which provide capacity to both attract investment and develop endogenously.

For Coombes, successful responses to external changes such as the Turning Points identified within this programme of research require a response which recognises these divergent factors and varied opportunities for growth. Change is most likely to be secured by long term development processes which build on assets and capacities rather than the transformation through initiatives like the New Towns policy which was a feature of policy in the past. And the outcomes are likely to be equally divergent to the starting point.

The Governance of Economic Development in Northern England

Professor Andy Pike, Newcastle University

Andy Pike describes the evolution of debate and research about the structure of governance required to most successfully support economic development in territories like the North of England.



He highlights a shift in focus for sub-national economic development policy across the developed economies. Policy is moving away from approaches based on subsidy and income redistribution, towards a mix of policies which promote competitiveness and the identification and fostering of growth potential. This is supported by analysis from across the OECD that there are opportunities for growth and development in places with different economic characteristics which can be identified and exploited.

To seek to secure these opportunities, across the member states of the OECD there is an increasing dynamic to decentralise structures and policies, enabling the integration of decision making and co-ordination of public policy at local and regional scales. He suggests that, in the context of the issues raised in the Turning Points – such as the response to globalisation of the economy, the recession and climate change – this is a policy direction which is likely to continue.

Common areas for policy focus link to challenges such as infrastructure, skills and innovation support. Successful interventions aim to stimulate increasing focus on the assets and economic potential of an area, and to ensure that barriers to growth, such as accessibility to markets are addressed. And because of the different structures of governance within states across the OECD – ranging from very centralised countries such as the UK to decentralised and federal models like Germany – different structures of multi-level governance have been developed to aim to secure successful prioritisation and co-ordination. The result is an uneven approach across the OECD membership with different governance models in place. Pike highlights evidence that one of the common characteristics is the importance of democratic accountability in the process of defining objectives and goals.

Against this background, the history of sub-national economic governance in the UK has been patchy with high levels of centralisation and low levels of local and regional capacity to deliver co-ordinated responses of this type. There has not been a strong and stable position for any sustained period.

There have been identifiable phases of policy development including the Urban Development Corporations and Government Offices of the 1980's Conservative Government, and devolution to the 3 Nations and decentralisation to the English regions since 1997 under Labour, which further evolved to a focus on City Regions and Integrated Regional strategies in the second half of the 2000's. The policies of the Coalition Government signal a move away from regions and to more local scales, although the detail of this change of emphasis still need to be revealed.

Session 4

Contexts and legacies

Response

It's the Governance, stupid

Baron Frankal and Chris Pope,
Manchester's Commission for the New Economy

Compelling evidence exists of the correlation between good governance and economic growth and development, and this was the proposition at the centre of this "Turning Point" session, and in particular the paper from the Spatial Economics Research Centre's John Tomaney and Andy Pike. They provided good support for growth and prosperity being at the heart of good governance, but noted that the creation of such "lasting, stable and effective mechanisms" has proved elusive. Indeed.

The discussion that followed the paper's presentation used the Commission for the New Economy as an innovative example of just such a growth orientated structure. Whilst a majority of Greater Manchester's ten Leaders sit on its board, a majority of that board is private sector, including the Chair. This enterprising structure puts long-term sustainable economic growth above all else, is private sector lead in concept and action, but has the full confidence of its co-terminus Local Authorities. It is, perhaps, exactly the kind of model that needs to be evaluated in terms of a basis for constructing the latest sub-national policy incarnation - Local Economic Partnerships (LEP's).

LEP's were but a glint in a future-Minister's eye at the time Pike and Tomaney prepared their paper, but it sets a high bar for these institutions as they emerge. Its starting point is that compared to international best practice in local economic development, the UK has a poor record. Compared to other countries, sub-national policymaking remains virtually non-existent in our incredibly centralised state. This is ingrained in our national consciousness, with a majority of talent flowing to London and the productivity gap between London and the South East and the rest of the UK widening with time through various generations of government policy. Ergo, we need to do something differently.

As the Turning Points papers make clear, economic conditions are developing rapidly; a changing population, environmental concerns and massive fiscal contraction in the public and private sector too.

Good governance brings evidence, logic, analysis and robust strategy to the fore, sidelining short-term political considerations (local as well as national) for the greater good of key objectives – in our case the pursuit of economic growth.

It would recognise for example that we are in the Asian century, and so investment there now, however difficult or slow burn, is going to pay the greatest dividends, not least through first mover advantages. The baton is passing before our very eyes: can we condition our supply (most importantly of knowledge) to meet their demand by the national polity enabling places like Manchester to have its own trade strategy?

Strong, stable governance prioritises, reaps opportunity and deals with challenges – in that order. There remains the much debated question of what level for such governance, and Mike Coombes' classification is an important contribution to that debate, highlighting how each place is different and must probably face challenges in different ways, often co-operating with other places as required by economic challenges.

A one size does not fit all philosophy does not, though, sit easily with tidy-minded civil servants who seek comprehensive solutions. How could it be that a function might be done at regional level in one place, at city regional level in another and that another still might not have any capacity at all, requiring a Whitehall solution filleted of the country's strongest parts? Patchworks and postcode lottery syndrome create political dread, but surely a world where elsewhere the fittest places sprint faster and are systematically encouraged to do so for the greater good, it is an inevitability that the priority for policy should be empowering places that have capacity, ambition and structures of accountability in place to achieve economic growth.

Mark Tewdwr-Jones's very valuable contribution provides a powerful narrative about the role of land. Again, the appropriate governance structure, at the right level, is crucial to having the right policies in place to ensure planning policy works towards the economic growth imperative. All too often it is an inhibitor, as the planning tail wags the economic dog. In a world of ever less public subsidy, the ability of a place to leverage its assets, foremost of which will be land, becomes critical.

There are six EU Member States smaller than Manchester, and so the potential is clear, as is acceptance of the need to get governance right. For us, this is surely the right level and tightness of unitary economic interest to pioneer stable and effective economic development mechanisms for a new age, where policy innovation and entrepreneurship and radical public sector reform are desperately needed, not least to balance the books and ensure effective delivery continues and accelerates. Tomaney and Pike contend that policy has moved tentatively from income redistribution to regional competitiveness. However the logical response to the continued failure to close the UK's still-growing productivity gap is surely much more radical acceleration along that path to somewhere approaching the devolution most economic centres in the western world have long prospered from. Better places will be ready to pick up that baton and run with it, if only they are allowed to do so.

Conference Attendees

Prof Peter Ache, Centre for Urban and Regional Studies, Helsinki
Sam Bacon, Core Cities
Prof David Bailey, Chair, Regional Studies Association and University of Birmingham
Richard Baker, The Northern Way
Peter Boden, University of Leeds
Frank Bowley, BIS
Tom Bridges, Ove Arup
Prof Chris Brooks, Science Po, Paris
Prof Paul Cheshire, Department of Geography and Environment, LSE
Prof Susan Christopherson, Department of City and Regional Planning, Cornell University
Prof Mike Coombes, CURDS, Newcastle University
Ed Cox, IPPR
Martin Crookston, Freelance Consultant
Prof Gordon Dabinett, Town and Regional Planning, Sheffield University
James Davies, Tyne & Wear City Region
Dr Stuart Dawley, CURDS, Newcastle University
Scott Dickinson, SQW
Lewis Dijkstra, European Commission
Dr Kieron Flannagan, Manchester Institute for Innovation Research
Simon Foy, Yorkshire Forward
Baron Frankal, Manchester Enterprises
Jose Enrique Garcilazo, OECD
Prof Dave Gibbs, Centre for City and Regional Studies and Hull Environment Research Institute, Hull
Prof John Goddard, Newcastle University
Dr Sara Gonzalez, Leeds University, School of Geography.
Anne Green, Warwick University
Rupert Greenhalgh, CLES
Nigel Guy, Yorkshire Cities
Prof Alan Harding, Institute for Political and Economic Governance, Manchester University
Prof Robert Hassink, Economic Geography Research Unit, Kiel University, Germany
Prof Louise Heathwaite, Co-Director, Centre for Sustainable Water Environment, Lancaster University
Dr Nick Henry, GHK, Principal Research Consultant
John Holden, Manchester Enterprises
Prof Ray Hudson, Durham University
Nicola Hughes, The Northern Way
Dr Sarah Jackson, N8 Research
Clare Johnson, Yorkshire Futures, Director
Alexandra Jones, Work Foundation
Mike Keoghan, BIS
Mick King, Hull and the Humber Ports

Andrew Lewis, The Northern Way
Beverley Linsley, The Northern Way
Allan Little, One North East
John Lowther, Tees Valley
Hakim Mbanzamihigo, Leeds Metropolitan University
Dave Moorcroft, Liverpool
Hugh Morgan-Williams OBE, The Northern Way
Chris Murray, Core Cities
Les Newby, Yorkshire Forward
Peter O'Brien, Tyne and Wear
Dr Christianne Ormston, The Northern Way
Prof Henry Overman, Department of Environment, LSE
Alice Owen, Sustainable Development Commission
Prof Michael Parkinson, John Moores, Liverpool
Kevin Peacock, Liverpool
Beth Perry, Centre for Urban and Regional Futures, Salford
Dr Andy Pike, CURDS, Newcastle University, SQW
Simon Pringle, SQW
Prof Phil Rees, University of Leeds
Dr Ranald Richardson, CURDS, Newcastle University
Prof Brian Robson, Manchester
Prof Andreas Rodriguez-Pose, Department of Geograpahy and Environment, LSE
Gillian Roll, One North East
Paul Rubenstein, Stockport Council
Prof Mark Tewdwr-Jones, Bartlett School of Planning and Architecture
Prof John Tomaney, CURDS, Newcastle University
Emmanouil Tranos, Newcastle University
Matt Waltho, NWDA
Martine Winder, Central Lancashire
Peter Winter, NWDA
Dave Wood, CLG
Sylvia Yates, Sheffield City Region

The full papers and other documents mentioned in this supplement are available for free download at:
www.thenorthernway.co.uk/northernfutures