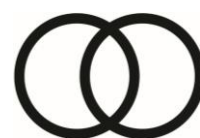


Community Wealth Building Strategy 2023-28

West Lancashire



CLES

the national organisation
for local economies

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Executive Summary

This report presents the first Community Wealth Building Strategy for West Lancashire Borough Council. The Borough Council recognises that the local economy, local people, and local communities face significant challenges whether that be access to fairly paid and good work, sustainability of local Small to Medium Sized Enterprises (SMEs), the risk of growing inequality, or the growing climate emergency.

Like many places in the UK, West Lancashire has recognised that the orthodox approach to Economic Development has not benefited everyone and there is a need to move to a new approach which is shaped by the needs of people, framed by relationships across the public, commercial and social sectors, driven by harnessing the spending power of Anchor Institutions and which delivers multiple local economic, social, and environmental outcomes. This new approach is called community wealth building.

This report and embedded community wealth building strategy has been developed by the Centre for Local Economic Strategies (CLES) in coordination with both Officers and Members through the Community Wealth Building Cabinet Working Group at West Lancashire Borough Council. CLES are the UK's leading organisation around community wealth building and have designed dozens of similar reports and strategies. This experience has enabled us to develop a report and strategy which is framed by knowledge of what works in different places and identify timeframes which are relevant to enable an iterative approach to implementation and which will lead to the behavioural change required to embed community wealth building as part of West Lancashire's wider transformation.

To develop the report and strategy, CLES has reviewed a whole raft of existing documentation from West Lancashire Borough Council, interviewed Officers with responsibility for different aspects of community wealth building, and reviewed overarching aims and specific actions with the Cabinet Working Group. This has enabled a report and strategy which consists of the following elements

Community wealth building in West Lancashire – Progress to date

Community wealth building is framed by five 'pillars' or themes of activity around: the progressive procurement of goods and services; fair employment and just labour markets; making financial power work for local places; socially productive use of land and property; and plural ownership of the economy.

Our initial review of documentation enabled us to understand in more detail which aspects of community wealth building West Lancashire Borough Council were already working upon, which aspects needed enhanced work as part of the

strategy, and which areas would lead to quicker transformation of the West Lancashire economy. It also enabled us to identify aspects of community wealth building for concentrating on immediately and others which were perhaps longer terms in their nature. We came to the conclusion that:

- For the **progressive procurement of goods and services pillar**, there is an opportunity to embed an approach to procurement that is framed by public and social value and this is something that given support and guidance can happen relatively quickly as part of the strategy.
- For the **fair employment and just labour markets pillar**, much work has already been done internally at West Lancashire Borough Council to ensure that Officers are paid a fair wage and have good quality terms and conditions. There is however an opportunity to influence wider Anchor Institutions through this strategy, particularly around where they recruit from.
- For the **making financial power work for local places pillar**, West Lancashire Borough Council already has in place a Financial Inclusion Strategy and is actively pursuing the formulation of Credit Unions. In addition, other aspects of this 'pillar' around harnessing pension funds for regeneration activity are recognised to be more effectively undertaken at a larger geographical level (Lancashire and Liverpool City Region).
- For the **socially productive use of land and property pillar**, this is a key area of opportunity for West Lancashire through the retrofitting of Council homes and wider Anchor Institution owned land and assets and moving towards more community owned energy systems. This would also enable the objectives of West Lancashire's Climate Change Action Plan to be met.
- For the **plural ownership of the economy pillar**, this is almost an overarching outcome which will be dependent upon the realisation of the activities of the previous four pillars. However, we do recognise that the formulation of more generative organisations in West Lancashire such as Worker Owned Cooperatives could be a key component of this strategy – however these are longer term aspirations than the timeframe of focus here.

Embedding a Community Wealth Building approach in West Lancashire

The above development of a baseline position led us to the conclusion that this initial and iterative community wealth building strategy for West Lancashire should be framed by the three core pillars of progressive procurement of goods and services, socially productive use of land and property, and plural ownership of the economy. In this, we then identified three core aims and a series of 12 activities as the focus for the community wealth building strategy.

Community Wealth Building Strategy aims & actions

Aim: To embed a community wealth building approach within West Lancashire Borough Council and across wider West Lancashire based Anchor Institutions:

- **Activity 1** - Embedding community wealth building as a driver of organisational transformation.
- **Activity 2** - Embedding community wealth building as a principle of council strategy.
- **Activity 3** - Building support and motivation for the community wealth building programme externally.

Aim: To build a more generative local economy:

- **Activity 4** - Developing an approach to progressive procurement with actions including:
 - Developing an understanding of West Lancashire Borough Council's existing supply chain;
 - Creating a social value policy and framework, including a bespoke approach to monitoring shaped by the National TOMs.
- **Activity 5** - Supporting and growing local enterprise with actions including:
 - Building supplier intelligence;
 - Developing an Anchor network procurement pipeline;
 - Removing barriers to public procurement.

Aim: To drive a just, low carbon transition. By retrofitting the built environment:

- **Activity 6** - Supporting the existing local retrofit sector.
- **Activity 7** - Growing the local retrofit sector.
- **Activity 8** - Developing a market for the local sector.
- **Activity 9** - Taking an Anchor network approach to low carbon transition.

And building a decentralised energy system:

- **Activity 10** - Engaging communities in energy transition.
- **Activity 11** - Support energy community infrastructure.
- **Activity 12** - Enable a community owned, decentralised energy system.

Community Wealth Building Action Plan

The final section of this report details an action plan for delivering the overarching aims of the strategy. In this, we look to prioritise the activities,

identify lead Officers and Members for their implementation, and provide suggested timeframes.

Introduction

This report for West Lancashire Borough Council marks the beginning of a journey to develop a more inclusive economy through a new approach to economic development - community wealth building. In so doing, the Council joins a progressive movement of UK local authorities and areas using this approach.

The mobilisation of a community wealth building approach requires political buy-in and leadership at the highest level. The Cabinet Working Group's commitment to this progressive programme of work is therefore an important first step. In the following introductory section, we outline why this work is important, what community wealth building is, and why West Lancashire Borough Council is seeking to embed a community wealth building approach.

Why this work is important

It is increasingly obvious that our current economic growth model is failing some locations and communities. Recent OECD data showed that the UK is the only developed economy in which wages fell while the economy was actually growing, albeit meagrely. The UK is an economy where one in eight workers live in poverty, and where 1.3 million people (including children) rely on food banks.

Nationally, these problems are not caused by a lack of wealth, but rather where wealth is going, who owns it and who benefits from it. Fuelling this inequality is the fact that the fruits of growth are too readily extracted by the already wealthy few, rather than increasing incomes for the majority. At a local level, the prevailing and orthodox model of economic development has failed to engage with these questions of wealth distribution, focusing instead on generating contributions to Gross Domestic Product (GDP).

What is Community Wealth Building?

Community wealth building is an approach to economic development that changes the way that our economies function, retaining more wealth and opportunity for the benefit of local people. This is in contrast to the predominant economic model, whereby wealth is created by property ownership, regeneration is based on speculative property development and large companies extract wealth for the benefit of distant shareholders.

Community wealth building achieves its aims by harnessing the economic and social power of locally rooted institutions. These are commonly referred to as anchor institutions. Typically, this means local councils, health boards, universities, colleges and housing associations, and potentially, the private sector too. The Voluntary, Community and Social Enterprise (VCSE) sector also plays a

fundamental role, by using its local intelligence and influence as a conduit for change and as an important part of the generative local economy in its own right.

Community wealth building is framed and shaped by five 'pillars' of activity:

- **Progressive procurement of goods and services** - Develop dense local supply chains of businesses likely to support local employment and retain wealth locally. These include SMEs, employee-owned businesses, social enterprises, co-operatives and community businesses.
- **Fair employment and just labour markets** - Anchor institutions have a defining effect on the prospects of local people. Recruitment from lower income areas, paying the Living Wage and building progression routes all improve local economies.
- **Making financial power work for local places** - Increase flows of investment within local economies by harnessing and recirculating the wealth that exists, as opposed to attracting capital. This includes redirecting local authority pension funds and supporting mutually owned banks.
- **Socially productive use of land and property** - Deepen the function and ownership of local assets held by anchor institutions, so that financial and social gain is harnessed by citizens. Develop and extend community use – public sector land and facilities as part of “the commons”.
- **Plural ownership of the economy** - Developing and growing small enterprises, community organisations, co-operatives and municipal ownership is important because they are more financially generative for the local economy – locking wealth in place.

Why Community Wealth Building in West Lancashire?

Like many places in the UK, West Lancashire has recognised that the orthodox approach to economic development as described earlier has not benefited everyone and there is a need to move to a new approach which is (amongst other things) shaped by the needs of people, framed by relationships across the public, commercial and social sectors, driven by harnessing the spending power of anchor institutions and which delivers multiple local economic, social, and environmental outcomes. This need for transformation and behaviour change is the core reason why West Lancashire Borough Council is shifting its approach towards community wealth building.

To assist with this transformation, West Lancashire Borough Council commissioned the Centre for Local Economic Strategies (CLES) to work in coordination with both Officers and Members (through the Community Wealth Building Cabinet Working Group) to develop this report and a first and iterative community wealth building strategy for West Lancashire.

CLES are the UK's leading organisation around community wealth building and have designed dozens of similar reports and strategies. This experience has enabled us to develop a report and strategy which is framed by knowledge of what works in different places and identify timeframes which are relevant to enable an iterative approach to implementation and which will lead to the behavioural change required to embed community wealth building as part of West Lancashire's wider transformation.

To develop the report and strategy, CLES has reviewed a whole raft of existing documentation from West Lancashire Borough Council, interviewed Officers with responsibility for different aspects of community wealth building, and reviewed the overarching aims and specific actions that will follow in subsequent sections.

Community Wealth Building in West Lancashire - progress to date

At the outset of any strategy formulation, it is important to review and acknowledge the activities that a local authority is already undertaking in relation to the theme of the strategy. Therefore, our initial review of documentation enabled us to understand in more detail which aspects of community wealth building West Lancashire Borough Council were already working upon, which aspects needed enhanced work as part of the strategy, and which areas would lead to quicker transformation of the West Lancashire economy. It also enabled us to identify aspects of community wealth building for concentrating on immediately and others which were perhaps longer term in their nature. The table below summarises the progress to date for each of the five pillars of community wealth building.

Pillar of Community Wealth Building	Progress to date
Progressive procurement of goods and services	An internal commitment to progressing the approach to procurement including a desire to develop a new policy
	Good relationships between the procurement and economic development teams and some signposting of suitable potential suppliers
	A 10% social value weighting in place across all procurement opportunities along with accompanying quantitative and qualitative evaluation criteria, shaped by the National TOMs
Fair employment & just labour markets	Payment of Living Wage to all direct Council employees
	Good direct employee terms and conditions in place
	Desire to transfer these principles to other anchor

	institutions and suppliers
	Commitment to recruiting from West Lancashire's most deprived areas
Making financial power work for local places	Financial Inclusion Strategy in place
	Commitment to develop and sustain Credit Unions
	Recognition of role of pension funds in regeneration at larger geographical scale
Socially productive use of land and property.	Climate Change Action Plan in place
	Recognised opportunity around retrofitting and community energy
Plural ownership of the economy	Desire to support the creation of more generative organisations including Social Enterprise and Worker Owned Cooperatives

Aim 1: Embedding a Community Wealth Building approach in West Lancashire

Community wealth building should be made central to the narrative and actions related to improving the economy of West Lancashire and, by extension, the lives and fortunes of West Lancashire residents. This report and strategy should not be viewed in isolation – instead it needs to be cross-departmental and linked to existing strategy and practice. Indeed, this report and strategy is framed by wider strategic documentation in West Lancashire including the overarching vision and priorities for the Council, together with an exploration of existing community wealth building activities as outlined in the table above.

The review of documentation and the above development of a baseline position led us to the conclusion that this initial and iterative community wealth building strategy for West Lancashire should be framed by the three core pillars of progressive procurement of goods and services, socially productive use of land and property, and plural ownership of the economy. In this, we then identified three core aims of focus and accompanying objectives for the community wealth building strategy framed and shaped by these pillars:

The following section of the report details the activities and accompanying actions to be undertaken through the community wealth building strategy for Aim 1 which is to **embed a community wealth building approach within West Lancashire and across wider West Lancashire based anchor institutions**.

Activity 1: Embed community wealth building as a driver of organisational transformation

Incorporate CWB into the political governance framework, identifying a designated CWB lead member

West Lancashire Borough Council has a community wealth building Cabinet Working Group with cross party membership that has been meeting since 2019. As the Council's new political governance arrangements are developed, it will be important that oversight of this strategy is driven by one of the new cross-party committee's as a political priority.

Establish an officer working group/board

To support the practical delivery of this strategy we would propose developing an officer working group or board which brings together officers from across the council to collaborate on the delivery of the strategy actions presented here. Each overarching activity should have 'lead' individuals or departments as detailed in the action plan at the end of this report and whose role it is to drive activities and actions forward. We would also propose identifying an overarching officer to lead the implementation of a community wealth building agenda across the council, with this officer reporting to the relevant committee and into the senior management team.

Activity 2: Embed community wealth building as the guiding principle of council strategy

Incorporate CWB principles in the refresh of the local economic development strategy

The current Economic Development Strategy 2015-2025 is due a refresh, arguably sooner than 2025 given the significant changes to the external economic context. At the point of refresh, we would suggest community wealth building member and officer groups taking a key role in ensuring that community wealth building principles are built into the refreshed strategy and using the above three aims and accompanying objectives as the basis.

Review all council strategies upon refresh against community wealth building principles where appropriate

For a community wealth building approach to be effective it should feature as a golden thread through the strategic framework of the council, making connections across areas of the council's delivery with a focus on maximising the local economic, social and environmental benefit. Therefore, upon refresh, all relevant strategies should contain this golden thread and connect to community wealth building principles. The refresh of the council's procurement strategy, estates strategy, housing strategy and the local plan for example, should all consider how they will and how they can contribute to growing community wealth and utilising the three overarching aims and accompanying objectives as the basis.

Create capacity within the Council to take this work forward

Community wealth building should not be viewed as a standalone activity which needs dedicated resourcing, it should be viewed as a set of principles or a lens, through which we view the operation of the council. Making community wealth building a political priority and developing an officer working group will give it the required priority, but wider staff knowledge and understanding of community wealth building will need to be developed. We would propose developing a programme of training and support for all existing and all new council via e-

learning modules to support a building of awareness, knowledge and understanding.

Activity 3: Build support and motivation for the community wealth building programme externally

Develop a West Lancashire Anchor Network

The West Lancashire Partnership involves several key anchor institutions working together to improve the health, care and wellbeing of people living in West Lancashire. The partnership works together to deliver a common vision: 'A place where we help each other, ourselves and our communities to be the very best we can be'. While this is a health focused partnership, it has recognised the connectivity between housing conditions and health and acknowledges that healthcare contributes only around 10% to preventing early death.

We would propose that West Lancashire Borough Council, utilises its position on the partnership to prioritise a greater partnership focus on the local economy and economic approaches to improving health and wellbeing, adopting a community wealth building approach across the partnership and developing individual institutions understanding of the behaviours and practices of an anchor institution within a community wealth building frame. Indeed, this report and strategy should form the basis of the anchor network, using its principles and seeking to embed the three overarching aims and accompanying objectives into the activities of the other partnership members.

Aim 2: Building a more generative local economy

Introduction

As outlined earlier in the context to this report and strategy, economic development policy and practice has not always delivered local economic, social and environmental benefits for the people it should have done. Often, and despite significant inward investment and wealth landing in place, the beneficiaries of this investment have been distant shareholders as opposed to local people and communities.

The same logic can be applied to the process of procurement – as local authorities have strived for efficiency savings, services have been outsourced and procurement has been undertaken on the basis of cost. This has often meant large commercial operators with little affinity to place delivering vast swathes of goods, services and works contracts.

Community wealth building takes a different view of economic development and procurement and one where rather than extracting wealth from local economies, in fact wealth is retained, circulates and delivers multiple local economic, social and environmental outcomes that benefit local people and place. This is therefore effectively Aim 2 of this West Lancashire community wealth building strategy which is to **build a more generative local economy**, by which we mean:

- Spending more money with West Lancashire based businesses and other organisations.
- Using procurement as a lever to contribute towards addressing wider local economic, social and environmental challenges.
- Engaging with and supporting organisations which by their nature bring local economic and social benefits and including SMEs, Worker Owned Cooperatives, Social Enterprises and Voluntary and Community Sector Organisations.

The following section of the report details the two activities and accompanying actions to be undertaken through the community wealth building strategy to realise Aim 2 – **to build a more generative local economy**.

Activity 4 - Developing an approach to progressive procurement

A key component part of community wealth building is to progress the way in which local authorities and other anchor institutions undertake the process of procurement. By progression, we mean moving beyond an approach focused

upon price and legislation to one that also includes consideration of social value and subsequently delivers community wealth building outcomes. In this West Lancashire Community Wealth Building Strategy, we have the following aim for procurement processes at West Lancashire Borough Council (this has been framed by accompanying work we supported around the leisure services contract which is detailed in Appendix 1).

“As part of every procurement exercise that it undertakes, West Lancashire Borough Council seeks to realise the best possible price for the goods, services or works which they are looking to buy and ensure that the chosen supplier has suitable experience and history in providing good quality and similar goods, services or works. West Lancashire Borough Council also seeks to ensure that the chosen supplier will bring benefits for the West Lancashire economy and its people and contribute towards addressing wider social and environmental challenges.”

As part of every procurement, that the Borough Council undertakes in the future, there will be an expectation that both those designing goods, services and works contracts (commissioners) and those bidding for and delivering contracts (potential suppliers) think about the following key considerations and that link to the overarching aim of building a more generative local economy:

- For **Service Managers/Commissioners** to think about the geographical location of potential suppliers and where possible engage local West Lancashire based suppliers in bidding for procurement opportunities. For **potential suppliers** to demonstrate as part of their bid the extent to which their own suppliers and sub-contractors are based in West Lancashire and utilise West Lancashire labour in their workforces.
- For **potential suppliers** to think about their own direct workforce and demonstrate as part of their bid the extent to which they are from West Lancashire (and particular deprived neighbourhoods) and also showcase policies and practices they have in place around ethical employment (Living Wage) and workplace health and well-being.
- For **Service Managers/Commissioners** to think about social value as part of the design of individual goods, service and works contracts, and identify social value outcomes that are relevant to what they are looking to procure. These additional benefits could include: the creation of new jobs and apprenticeships, volunteering in the local community, improving the skills of the local future workforce, and reducing the distances goods travel. For **potential suppliers** to demonstrate as part of their bid how in addition to the delivery of the contract they are going to deliver upon relevant Social Value outcomes for benefit of the West Lancashire economy and its people, and in turn contribute towards addressing social and environmental challenges.
- For **Service Managers/Commissioners** to think about how the supply chain of the Council can potentially be diversified to include more

generative organisations including SMEs, Cooperatives and Social Enterprises, for example. And to make these organisations aware of relevant opportunities.

The realisation of the above shifts in behaviour of service managers/commissioners, procurers and suppliers, however require a number of actions to be undertaken as developing an approach to progressive procurement as follows.

Develop understanding of West Lancashire Borough Council supply chain

Undertake annual spend analysis

- West Lancashire Borough Council should undertake annual analysis (at the end of each financial year) of their procurement spend. This should look to identify:
 - How much has been spent in total procuring goods, services and works in that year.
 - The extent to which spend is with suppliers based in the geographical areas of West Lancashire, Lancashire and Merseyside, and North West England.
 - The extent to which spend is with SMEs and other generative suppliers (Cooperatives, Social Enterprises, Voluntary and Community Sector Organisations).
 - The extent to which spend is with suppliers in particular industrial sectors and subsequently for suppliers based outside of North West England the extent to which this spend can be potentially influenced in the future.

West Lancashire Borough Council should undertake the analysis for financial year 2021/22 in order to create a baseline and then identify areas such as increases in SME spend as key aspiration moving forwards.

Manchester City Council

CLES has been undertaking annual spend analysis on behalf of Manchester City Council since 2008/09. The initial analysis enabled Manchester City Council to develop a baseline position that 52% of their spend was with suppliers based in the Council boundary. Subsequently, the City Council has sought to adapt the way in which it engages with suppliers and undertakes procurement policy to not only increase levels of spend with local suppliers but also embed considerations of Social Value into procurement practice.

Share findings with West Lancashire Partnership

The findings of this spend analysis should be shared with the West Lancashire Partnership, in order to demonstrate the methodology and to also start the

process of encouraging them to think about their supply chains and the extent to which they are contributing towards building a more generative local economy.

Encourage development of detailed understanding of West Lancashire Partnership supply chains

As part of the sharing of West Lancashire Borough Council's spend analysis findings with other partners, they should also share the methodology and encourage the partners to undertake their own spend analysis and commencing in 2022/23 financial year. This will enable a universal approach to be adopted and a detailed understanding of procurement spend across West Lancashire's anchor institutions.

Spend Analysis Tool

CLES has been undertaking spend analysis activity for nearly 15 years and as part of this has created a tool and accompanying guide in which local authorities and other anchor institutions can input their procurement spend data and the tool will develop data around percentage of spend with local suppliers and percentage of spend with local SMEs, for example. The tool can be viewed here: <https://cles.org.uk/making-spend-matter/>

Create social value policy and framework

West Lancashire Borough Council should create an overarching Social Value Policy and accompanying Framework. The policy and framework will predominantly be for service managers/commissioners as they seek to identify the types of social value outcomes that are relevant for the goods, services or works that they are seeking to procure. The policy and framework will need to include:

- The Social Value **outcomes** which West Lancashire Borough Council are looking to realise through the procurement process – these will be aligned to the outcomes detailed in the West Lancashire Vision.
- The types of potential Social Value **activities** which suppliers could deliver through procurement contracts to contribute towards realising those outcomes.
- The types of **questions** that could be asked during a procurement exercise to enable suppliers to demonstrate the types of social value activities they will commit to during the delivery of the contract.
- Means through which service managers/commissioners and procurers can **evaluate** suppliers' responses to social value questions.
- A **monitoring tool** against which West Lancashire Borough Council can monitor the successful suppliers against in terms of their social value commitments. This could be framed by the National TOMs and made bespoke to West Lancashire

- A **matrix** which details the extent to which the different social value outcomes and activities are relevant for the different types of goods, services and works that West Lancashire Borough Council procures.

The action is therefore for West Lancashire Borough Council as part of the refresh of the existing procurement policy to go through the process of developing the Social Value Procurement Framework. This will require cross-departmental working and potentially the support of an organisation like CLES and will involve a number of sub-actions:

- Identification of outcomes for the framework.
- Research into types of social value activities.
- Development of set of core questions and techniques for evaluating them.
- Exploration of the outcomes which are relevant for different types of goods, services and works procurements
- Development of monitoring tool to demonstrate output, outcomes and impacts during delivery.

Darlington Borough Council

In 2019/20, CLES produced a similar Social Value Procurement Framework for Darlington Borough Council and developed the elements described above. The Framework was shaped by the outcomes of the Darlington Partnership meaning that it was designed not just to influence the procurement decisions of the Council but also those of wider anchor institutions. The Framework is used as part of the commissioning of all goods, services and works contracts at Darlington Borough Council as a way of identifying suitable Social Value outcomes and as a means of asking specific questions about those outcomes.

Provide training for officers and members

West Lancashire Borough Council should develop and implement two different types of training for Officers and Members. The first will be open to all Officers and Members and will focus upon 'what is procurement?' and 'what is social value and why is it important'. The second will be open specifically to service managers/commissioners and will provide a step-by-step approach to implementing the Social Value Policy and Framework as described above.

Cascade to West Lancashire Partnership

Once the Social Value Procurement Framework has been developed, this could be shared with the West Lancashire Partnership and a discussion opened about how a collective West Lancashire wide approach to social value could be developed, so that when businesses work with the public sector they know what to expect, and a clear message is sent to the market about what is required to benefit from public sector money in West Lancashire. Similarly, the training programmes

described above could be shared with other anchor institutions and wider partners.

Blackpool Council

For Blackpool Council it is important that Social Value is not just something that is thought about as part of the commissioning of a good, service or work, but something that cuts across the entirety of the procurement cycle and including the monitoring of Social Value outcomes and outputs. To enable this to happen, Blackpool Council recruited a dedicated Social Value Officer, whose job it is to liaise with suppliers on their Social Value commitments, and also to influence and provide training for other anchor institutions around Social

Activity 5 - Supporting and growing local enterprise

The section about activity 4 above has outlined how West Lancashire Borough Council and potentially other partners will adapt procurement processes and practices in order to build a more generative local economy, where local businesses and other organisations deliver procurement contracts and whereby successful suppliers deliver a range of local economic, social and environmental benefits.

This will be helpful in shifting the culture of service managers/commissioners and procurers within the Council and other partner organisations. However, to build a more generative economy, there is also a need for a shift in the behaviour of the market – in this case local businesses and other organisations and existing suppliers. These organisations need to know more about the types of procurement opportunities available to bid for, more about what is meant by social value, and more about how they contribute towards wider priorities in West Lancashire.

Build supplier intelligence

The first set of actions as part of activity 5 is about West Lancashire Borough Council and other anchor institutions building knowledge and intelligence of organisations based in West Lancashire which might be able to bid for and deliver procurement opportunities. This action should build on the already strong relationships between procurement and economic development teams and should consist of two aspects.

Develop local business database

West Lancashire Borough Council should build a database of local businesses that could potentially bid for and deliver procurement contracts in the future. The

database will be framed by the spend analysis and particularly the sectors where the greatest amount of procurement money is being spent outside the Northwest of England. The database will be broken down by sector and will enable commissioners and procurers to identify relevant potential suppliers and raise awareness of upcoming opportunities with them.

Preston City Council

As part of their wider approach to community wealth building, Preston City Council has developed a database of local businesses and other organisations that could potentially deliver procurement contracts. The database includes organisations in the sectors where there is the greatest amount of extraction from the North West economy in the City Council's existing supply chain. There is a specific focus on sectors such as catering, IT, and construction, for example. Commissioners of goods and services look at the database as part of the design of specifications and explore whether there is scope to raise awareness of the opportunity with those organisations.

Share intelligence on local suppliers

This database can be used to highlight businesses that have and have not been engaged in the West Lancashire Borough Council supply chain previously. Working with the West Lancashire Partnership, this resource could be further developed and shared with other partner organisations, providing a mechanism for sharing intelligence on local businesses that are interested in procurement opportunities and also businesses that undertake wider and positive local economic, social and environmental behaviour.

Develop Anchor network procurement pipeline

One of the key challenges posed by the market when it comes to procurement opportunities is that they are often unaware of the types and goods, services and works local authorities are looking to procure and that the bidding process is too short between issuing the tender and expecting a response. This is a particular challenge for SMEs. This action is therefore about developing plans of the types of procurement opportunities that are upcoming and raising awareness with local organisations and SMEs earlier in the process.

Publish West Lancashire Partnership procurement pipeline

West Lancashire Borough Council should engage with the West Lancashire Partnership to encourage the development of a shared approach to progressive procurement. All anchor institutions in the partnership should be tasked with collating their procurement pipeline (defined as next 12-18 months) contract opportunities in the same format, publishing this and developing local awareness of it among local business representative organisations and business support agencies.

The economic development function at West Lancashire Borough Council and business representative organisations such as the North Western Lancashire Chamber of Commerce have a key role in delivering on the aspiration of building a more generative local economy. They have the knowledge of who local businesses are and importantly the ability to influence the way in which

businesses behave through business support and training functions. West Lancashire Borough Council should encourage business support and representative organisations to share the information detailed in the procurement pipeline and more broadly embed social value as a theme in their business support offer.

To enable this, West Lancashire Borough Council and in cooperation with partners will develop webpages that showcase the suppliers they use, highlight upcoming opportunities and promote the 'Get Ready to Bid' seminars (as outlined below)

Removing barriers to public procurement

West Lancashire Borough Council and particularly the economic development team will utilise the spend analysis and database (as described above) to identify the sectors of the economy where there is the greatest amount of leakage out of the West Lancashire and wider regional economy. This stratification will subsequently identify businesses and other organisations to be targeted for bidding for future procurement opportunities on the basis of being based in West Lancashire and their wider community wealth building credentials. However, these organisations will face further barriers in bidding for procurement opportunities which can be addressed as follows.

Get Ready to Bid seminar series

West Lancashire Borough Council (led by the Economic Development Team) should work with the North Western Lancashire Chamber of Commerce and other business support providers to develop and deliver a 'get ready to bid' seminar series for organisations identified through the database. The seminar series would cover off the basics of what procurement is, together with modules on putting together successful bids, and responding to questions around social value. These Seminars will be promoted through the webpages (as described above).

Aim 3: Driving a just, low carbon transition

Introduction

The current cost of living crisis has highlighted the urgency with which we need to drive the transition to a low carbon economy. Fuel poverty data from 2020 (latest available and as detailed in Appendix 2) indicates that 13.1% of households (6,357) in West Lancashire were estimated to be in fuel poverty, however in certain LSOA's this was estimated to be as high as 24% (Tanhouse & Digmoor in Skelmersdale).¹

Following recent rounds of energy price increases and the associated inflation in the cost of living, especially in food and transport, by the end of 2022, Tanhouse & Digmoor in Skelmersdale may have over 47% of households in fuel poverty, while more rural outlying areas such as Bickerstaffe and Scarsbrick may have the fuel poverty levels of Tanhouse and Digmoor entered this year with (circa 25%). By the end of 2022, it is estimated that the number of households in fuel poverty will have almost doubled within a year, increasing from 6,357 to 12,396 households.

The West Lancashire retrofit programme for council owned buildings and council owned housing stock is informed by a long term (30 year) Asset Management Strategy. This programme will create significant economic activity, with private sector businesses providing the skills, know-how and capacity to deliver the required works. As our timeframe for reaching our carbon targets gets ever shorter, those with the skills, know-how and capacity will be in ever greater demand. A community wealth building approach to retrofit would advocate for a range of strategies to ensure the local market is able to meet this local demand over time.

Lancashire has 151 TrustMark² registered suppliers in a range of retrofit sectors (as detailed in Appendix 3), however only 11 of these are based in West Lancashire. While the TrustMark database indicates a small specified retrofit sector locally, exploring the West Lancashire business base, we have identified 722 West Lancashire businesses who operate in what you would identify as 'retrofit' sectors. These are overwhelmingly micro enterprises, with 93% of these businesses employing under 10 people and the remaining 7% of businesses employing between 10 and 49 people. There are no medium sized or large business in these 'retrofit' sectors based in West Lancashire. These construction

1

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1056777/annual-fuel-poverty-statistics-lilee-report-2022-2020-data.pdf

² TrustMark is a Government Endorsed Quality Scheme covering work a consumer chooses to have carried out in or around their home.

based firms may have the potential to develop retrofit specialisation and support deep retrofit activities locally.

The following section of the report details the two areas of activity to be undertaken through the community wealth building strategy to realise Aim 3 – **to drive a just low carbon transition.**

Retrofitting the built environment

Activity 6 - Support the existing local retrofit sector

Develop a detailed understanding of the local business base

We would suggest working with business representative organisations to further develop intelligence on the capability of the specialist retrofit businesses and the potential for firm diversification, understanding capacity for, and barriers to, engagement in public sector supply chains. North West Lancashire Chamber of Commerce maintain a local supplier list which could serve as the basis of a shared database.

Support the existing firm base to access local opportunities

Working alongside business representative organisations and the West Lancashire Partnership, routes to market for the procurement of retrofit works should be evaluated to understand the extent to which these opportunities are visible to local businesses. For example, the question could be asked of tender portals that advertise opportunities, what extent to which these are reaching local West Lancashire businesses. In terms of supplier engagement, utilising new intelligence (as above) would allow for more targeted engagement with this subsector.

Support the existing firm base to recruit locally

Many SME's in the retrofit sector are hesitant to grow given the constant uncertainty and flux in the UK governments support for the sector. Building intelligence about the capability of the sector will help to evidence firms looking to grow. Unpicking the challenges they face in recruitment and growth can support the development of the Constructing Low Carbon Lancashire programme as it grows from its current pilot status.

Given the sector is dominated by micro firms, a shared apprenticeship programme could support these firms, who are generally supportive of apprenticeships, but the practical considerations stop them from taking them on. A number of places have developed programmes which de-risk the process of taking on an apprentice and allow them to work part time or for fixed durations, with no commitment to take them on permanently.

Case Study: Y Prentis Shared apprenticeships

Y Prentis is supported by the Construction Industry Training Board CITB and Welsh Government. The scheme has been developed to offer the construction industry a flexible apprenticeship provision which assists in meeting corporate social responsibility targets within government contracts. The business model is based on the requirement on commissioners to consider early on, not only economic and environmental issues, but also the social benefit of their approaches to procurement. Part of the requirements to secure new work will often include Apprenticeship recruitment as a requirement of the tendering process. Employers that support apprentices can generally expect to get more invitations to tender.

The Y Prentis Shared Apprenticeship business model allows employers to enjoy all the benefits of an apprentice, without the direct employment responsibility as this is taken up by the Y Prentis. The scheme aims to provide a solution to employers involved in the procurement process so they can make a commitment to a young person, even though their contract on site may only be for a short period.

Procurement is pooled within a region and the apprentice rotated from one contractor to another, until they have completed their full Apprenticeship framework at Level 2 or 3. This means that employers can still play an important part in training as the scheme allows them to take on an apprentice, for as short a duration as three months, with no commitment to the apprentice at the end."

<https://www.yprentis.co.uk/>

Explore models of co-operation enabling micro firms to deliver larger contracts

From co-operation around apprenticeships, to co-operation around contract delivery. Given 93% of firms in the retrofit sector are micro firms, they are unlikely to be in the market for large public sector contracts on their own. However, if a platform to encourage co-operation could be developed then consortiums could be built that would enable local firms to come together and bid for the larger public sector contracts, supporting the decarbonisation of the public estate and social housing across West Lancashire.

Case Study: DigiConCoOp - Transforming Micro-Project Delivery through Digital Co-Operative Construction

Transforming Micro-Project Delivery through Digital Co-Operative Construction is the title of a research project led by Dr Fred Sherratt, previously of Anglia Ruskin University, funded by Transforming Construction Network Plus.

DigiConCo-Op is an alternative way of procuring construction, ideal for clients looking for different things from their projects, such as enhanced social and economic value. DigiConCo-Op will enable local trades (micro-SMEs and SMEs, here collectively termed MSMEs) to come together to plan the project before it starts and input to a digital platform, which then runs the job like a main contractor would. As all the trades are working to the common goal of project completion, rather than their own individual elements of the work, this will inherently improve time, cost and quality on the project. The trades are paid a fair wage for their time on the project and receive an agreed and fair share in the profit from the finished project on completion.

This removes the need for a main contractor and opens up opportunities for smaller projects to be built by local firms and sole traders in a way that rewards those who do the actual work, whilst also optimising the social and economic value of such projects to their local community.

CLES are currently working with Dr Fred Sherratt to explore how the concept of a DigiConCo-Op can be developed in the South of Scotland, working in conjunction with the Southern Uplands Partnership, a not-for-profit organisation with an environmental, rural regeneration and community focus operating in the Scottish Borders.

Activity 7 – Grow the local retrofit sector

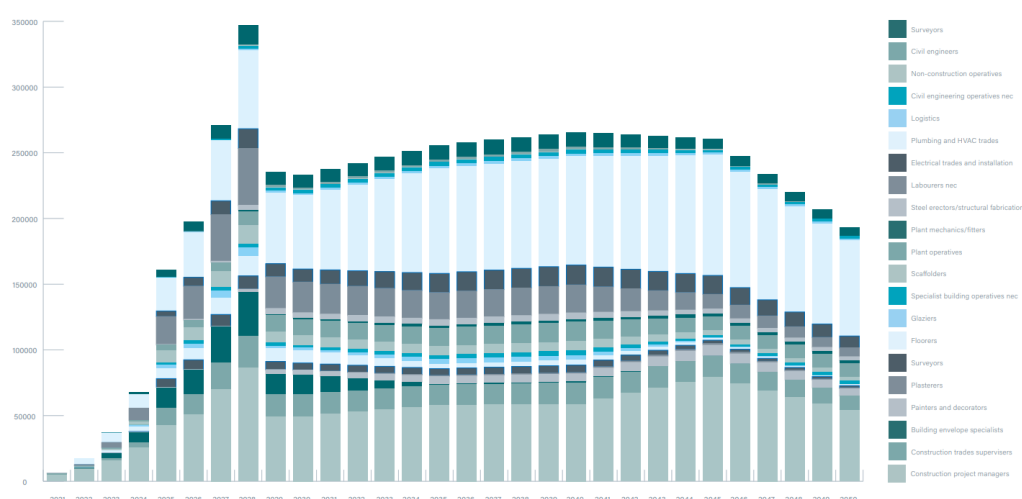
Develop a strategic view of new firm requirements

Having developed intelligence on the local retrofit sector, this should be mapped against West Lancashire's Asset Management Strategy to understand where there are gaps in the existing West Lancashire/Lancashire wide business base. This strategic view of new firm requirements can be fed through to business start-up services, inform developments in the Shared Prosperity funded activities and inform West Lancashire's economic development strategy.

Develop a detailed understanding of skills requirements in the sector

Lancashire Local Skills Improvement Plan (LSIP)³ has developed a root and branch review of the skills requirements needed by the business community across Lancashire, now and for the future. The Plan provides a range of recommendations based on employer feedback and highlights an apparent disconnect between employers and training providers.

CiTB's Building Skills for Net Zero report⁴ highlights the speed with which retrofit skills are going to be in demand, peaking by 2028. Plumbing and HVAC trades, labourers and construction project managers are going to be in huge demand. There will be a growing need for retrofit assessors, project coordinators, site supervision and management, with project management skills, rather than technical delivery skills being required. Areas where existing workers could be upskilled.



Work with local skills providers to develop skills pipeline

In July 2021, Lancashire was chosen by the Department of Education as one of eight Trailblazers to reshape the local technical skills system to better support the needs of the local labour market and the wider economy. A collaborative partnership has been created between employers, colleges, private sector providers, universities, trade associations and key stakeholders who have pledged to work together in shaping adult learning and apprenticeship programmes to satisfy the needs of industry.

West Lancashire College developed a £2.5m Construction, Engineering & Logistics Centre in 2019. Constructing Low Carbon Lancashire is a collaboration between

³

https://www.lancashirelsip.co.uk/downloads/LSIP_Report_31%20March%202022_Website_Publication.pdf

⁴ https://www.citb.co.uk/media/vnfoegub/b06414_net_zero_report_v12.pdf

eight core Further Education colleges across Lancashire with the Green Initiative Centre to be developed at West Lancashire College.

Local training providers beyond the traditional colleges are very flexible, as they are small they can be more responsive and flexible in delivery. SB Skills Solutions Ltd based in Skelmersdale and the Skills Construction Centre in Kirkham offer plenty of construction related skills courses, working collaboratively these providers should be viewed as assets in the development of the retrofit skills

Constructing Low Carbon Lancashire

Addressing a recognised industry need, in the context of the Lancashire region, the project aims to deliver the skills, qualifications and competences needed to support the meeting of ambitious targets in the Climate Change Committee's Net Zero Report, the Intergovernmental Plan on Climate Change (UK 2050 targets) and the Government's Ten-Point Green Industrial Revolution Plan, through positive and effective collaboration. This collaboration of colleges is committed to providing excellence in training, and a consistency of high quality provision, ensuring that large employers and their supply chains are able to effectively respond to emerging technologies in delivering against the greener homes agenda.

Collaboration between eight core Further Education colleges. The creation of Building Services Skills Zones at Preston College, a new Plumbing Technology Centre at Blackburn College, an Insulation Technologies Zone at Lancaster and Morecambe College, a Green Initiative Centre at West Lancashire College and the updating of curriculum resources and existing Building Services provision at Blackpool and Fylde and Burnley College, Lancashire-based employers will be supported as the Construction sector transitions to Air Source Heat Pumps, Ground Source Heat Pumps and associated Smart Technologies. Nelson and Colne College Group and Runshaw College are also engaged in supporting this exciting development.

<https://www.preston.ac.uk/preston-college-to-lead-ambitious-skills-drive-to-ensure-lancashires-construction-sector-is-ready-to-respond-to-the-low-carbon-agenda/>

West Lancashire will need.

Inspire younger people to pursue careers in retrofit

Attracting young people into the industries will be vital to sustain the growth of the sector and to meet demand. In this there is work to be done in changing perceptions and attitudes of both teachers and parents, in particular in highlighting the highly skilled and high paid roles within the sector and the growth of new specialisms and job roles around building energy management and modelling for example.

The LSIP highlights how priorities in schools need to change from academic attainment to a more mixed approach with vocational and technical skills (with strong employment outcomes) with recommendations to work with the careers service to develop way of better educating not only young people, but also

Retrofit Action for Tomorrow (RAFT)

RAFT provides education and retrofit advice to schools, local organisations and the wider community in a proactive response to the climate emergency. Today's children will confront the immense challenge of climate breakdown over the next few decades. RAFT's unique approach is to empower schools, children, their families and the wider community to improve thermal performance of the buildings they occupy, radically reduce their carbon emissions and inspire the next generation of young people to enter into built environment careers.

"My son...came back not only inspired to be an architect but also wanting to be a champion of change. He now wants us to get triple glazing and make our house energy efficient." — Year 6 parent



<https://www.retrofitaction.org.uk>

parents and teachers, of the opportunities that exist in these industries.

In the retrofit of school buildings, schools could be encouraged to engage the students in the process and build the school curriculum around the process. With the greater engagement of local firms in the supply chain, social value contributions could be harnessed to build on-going relationships between firms and local schools.

Activity 8 - Develop a market for the local sector

Programme the retrofit of the West Lancashire Borough Council public estate

Priority 1 of the Climate Change Strategy is to deliver a Carbon Neutral Council, focusing on reducing energy consumption as far as possible across the corporate estate. The West Lancashire Climate Strategy indicates a need to consider initiating a multi-year programme of insulation and other energy efficiency measures to the council's public estate. Developing this programme into works pipeline which could be shared with the local sector would grow the confidence of local firms to expand, take on apprentices and invest in skills development.

Programme the retrofit West Lancashire council owned housing

The Council housing stock of circa 5,880 properties (predominantly in Skelmersdale and Ormskirk) have had significant investment to improve their energy efficiency, but there is still far more to be done. The Housing Strategy, needs a renewed vision that is not only cognisant of the current energy crisis and the overall affordability of housing, but also the local economic opportunity of engaging with a local market to deliver retrofit programmes.

Review Asset Intelligence Model in light of energy crisis

The Stock Condition Survey in 2022 identified £230m of expenditure required over a 30-year period just to maintain the Council's housing stock at current standards. Improvement investments e.g. external wall cladding or solar photovoltaic panels) are however discretionary. For each property a Net Present Value (NPV) is calculated, which demonstrates its financial performance over a 30-year period. Consideration could be given to modelling NPV figures based on potential significant increases in rental defaults as more and more of tenant's income is consumed by energy bills and the increasing cost of living, with food and transport costs disproportionately impacting those on low incomes.

Harness social value commitments to further support and grow the sector

The Council's new 5-year Asset Management Strategy (AMS) provides greater scope to make connections between housing investment and increasing the social value of our contracts such as, increased training opportunities through the development of a social enterprise models which could potentially benefit the whole borough, developing/utilising local supply chains and utilising local educational institutions.

Activity 9 - Take an anchor network approach to asset decarbonisation

West Lancashire Borough Council along with the members of the West Lancashire Partnership are facing shared challenges in the decarbonisation of the public estate. There are clear opportunities for collaboration and shared resources.

West Lancashire Partnership Low Carbon Working group

While the West Lancashire Partnership is a health focused partnership, it has clearly acknowledged healthcare contributes only around 10% to preventing early death, and the meaningful employment and good jobs with good terms and conditions play a critical role in improving population health. There is an opportunity for West Lancashire Partnership members to work together to share experiences, learning and approaches to asset decarbonisation with a focus on how this can support the local economy and improve local population health.

West Lancashire Partnership Low Carbon shared team

Moving beyond a working group, the West Lancashire Partnership could pool resources to support a shared low carbon team which could provide significant benefits, supporting additional local employment and re-spend in a shorter and better co-ordinated timeframe, in addition to carbon reductions faster than currently anticipated under business as usual. All institutions will need to conduct similar activities, from carrying out energy reviews of buildings, to devising heating system replacement programmes, energy management systems, and renewable energy feasibility to identify the potential on-site renewable energy generation across assets (Inc. wind, solar PV, Solar Thermal).

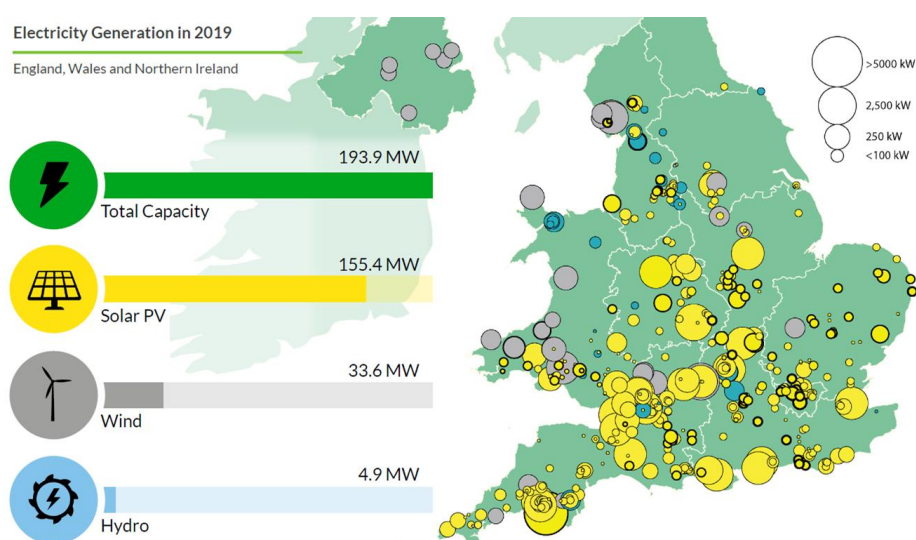
Develop place-based funding ask of government

There are immediate opportunities to secure funding to invest in low carbon infrastructure through the Public Sector Decarbonisation Scheme and other emerging funding streams announced in the Government's Net Zero Strategy. A shared asset decarbonisation team would provide the partners with the expertise and resource to bid for and access the capital investment needed to realise climate ambitions. Investment in carbon reducing infrastructure can also open up new revenue streams and commercial opportunities for the public sector in the long term. Any investment in a shared team should be considered with this in mind.

Building a decentralised energy system

In the UK, the energy system is predominantly centralised with centrally generated electricity and centrally distributed gas. Market rules, institutional arrangements, business models and social norms have made our energy system difficult to change, making the twin policy challenges of climate change and energy security more difficult to address.

A decentralised energy system would however offer a wealth of advantages, taking energy supplies away from major utilities and into the remit of local authorities and local communities. A decentralised energy system generates energy closer to the site of consumption, lowering carbon emissions, reducing transmission losses and building wealth in communities.



In 2018 the Council approved a 6-hectare ground mounted solar farm to the North West of Skelmersdale, providing electricity to the NSG Technical Centre. In this case, whilst the scheme was considered inappropriate development in the Green Belt and would involve the loss of high-grade agricultural land, on balance the benefits were considered to outweigh the harm, demonstrating the 'planning balance' that needs to be achieved. West Lancashire has a number of examples of district heating, with examples in sheltered housing schemes. A Combined Heat and Power (CHP) system serves a sheltered housing scheme of 40 dwellings also receives payments from the non-domestic RHI scheme. Air Source Heat Pump's (ASHP) have been installed in over 150 properties, and a feasibility study has been commissioned for a residential ambient heat loop.

Beyond these encouraging small scale examples, there has not been significant take-up of renewable and low carbon energy and a number of planning applications that have been brought forward have been refused. Green Belt, high grade agricultural land as well as ecological and landscape designations have been significant factors in reasons for refusals.

The NSG Technical Centre approval was able to demonstrate the use of the generated energy, supporting the sustainability of the scheme and its role in supporting a local institution. In achieving this 'planning balance', renewable and

low carbon energy projects need to demonstrate the benefits they provide to the local community and local businesses. One of the most direct way of doing this is to facilitate community ownership of projects so that the 'balance the benefits' clearly weigh in favour of development.

Activity 10 - Engage communities in energy transition

Given that among the most important factors influencing whether renewable and low carbon energy projects can come forward in West Lancashire, are the views of the local community (i.e., residents, businesses and other stakeholders), we would propose a range of strategies to engage local communities and empower them to take a lead role in the energy transition.

Empower local communities to engage in the agenda

The Skelmersdale Community Energy Association is nascent in its development trajectory, but has successfully applied for funds to undertake a feasibility study into potential for powering the town with renewable sources of energy. West Lancashire Borough Council should explore how it can support Skelmersdale Community Energy Association to build greater community buy in, and to start to stimulate the development of approaches in other parts of the borough.

West Lancashire Borough Council, working with VCSE sector partners and the local community should begin an open conversation about how the energy transition can be achieved while also building wealth in local communities. Working with the VCSE sector, made up of primarily small voluntary organisations, an assessment can be taken of where the energy and enthusiasm for the development of a community energy sector may lie.

While Skelmersdale is the largest urban area in the district, the communities of Ormskirk and Burscough can be supported to come together to explore how they can take control of the energy transition, as can the rural villages across the west and north of the district. West Lancashire Borough Council could support such a process by convening events alongside community partners, which bring together examples of good practice from the community energy sector, stimulating ideas and enthusiasm and demonstrating the art of the possible.

As a landlord, West Lancashire Borough Council should be seeking to empower its residents to understand the underlying issues with our centralised energy system and why the costs of energy are rising so fast and what alternative models could be developed. Oldham Energy Futures is an example of a project CLES has supported which has helped two deprived neighbourhoods to make key recommendations that will put their community on track for a low carbon future, one in which local people benefit from the solutions created.

Oldham Energy Futures

In Oldham Energy Futures Carbon Coop is supporting two neighbourhoods, Sholver and Westwood, to discover, shape, test and own plans & projects designed to transform their neighbourhood. The project seeks to engage local people to improve the power, heat and transport systems that serve them whilst also benefiting their neighbourhood. Putting citizens at the front and centre of decision making and planning in their local area is the key to kick starting a more democratic energy transition. The project is funded by ICLEI as part of Action Fund.

A group of 12 local representatives in each neighbourhood have come together alongside energy professionals and planners to share their local knowledge and expertise and develop a Local Energy Action Plans. The programme has provided a structured learning about energy issues and supported local people to make key recommendations that will put their community on track for a low carbon future, one in which local people benefit from the solutions created.

Oldham Energy Futures aims to empower Oldham communities to shape their future energy system, develop bespoke energy action plans, model how developing local energy systems can provide economic, environmental and social benefit for Oldham by locking in community ownership of new energy infrastructure, policy and practices. CLES are supporting the development of an Oldham Energy Futures toolkit to provide a model for neighbourhood energy action planning that places people at the centre of decision making, a toolkit that will be ready to be rolled out by local authorities, communities and wider anchor organisations.

Develop a focal point for an energy community

The energy transition is something all sectors of the community will need to engage with, residential homes, businesses and institutions will all need to be supported in the process. Having opened a conversation with these stakeholders we would propose developing focal points for this 'energy community'. Working with the VCSE sector, the library service and West Lancashire community centres, we would propose having a number of resource centres where residents and business owners can access information and support to reduce their own energy use/generate their own energy, but also get involved with their local community in developing collective solutions to the energy transition.. The development of the Skelmersdale Community Improvement District (CID) certainly aligns with this as a concept.

Energy Communities – European Commission definition

Energy communities organise collective and citizen-driven energy actions that help pave the way for a clean energy transition, while moving citizens to the fore. They contribute to increasing public acceptance of renewable energy projects and make it easier to attract private investments in the clean energy transition. At the same time, they have the potential to provide direct benefits to citizens by increasing energy efficiency, lowering their electricity bills and creating local job opportunities.

By supporting citizen participation, energy communities can help providing flexibility to the electricity system through demand-response and storage.

Energy communities offer a means to re-structure our energy systems by harnessing energy and allowing citizens to participate actively in the energy transition and thereby enjoy greater benefits.

Energy communities can take any form of legal entity, for instance that of an association, a cooperative, a partnership, a non-profit organisation or a small/medium-sized enterprise. It makes it easier for its citizens, together with other market players, to team up and jointly invest in energy assets. This in turn, helps contribute to a more decarbonised and flexible energy system, as the energy communities can act as one entity and access all suitable energy markets, on a level-playing field with other market actors.

https://energy.ec.europa.eu/topics/markets-and-consumers/energy-communities_en

Skelmsdale Community Improvement District (CID)

A post war new town, Skelmersdale in Lancashire was largely developed in the 1960s & 1970s and is served by the Concourse, a privately-owned, two-level shopping mall built in the 70s, and other smaller shopping areas serving different estates; the main focus will be Westgate, a single row of shops, and Digmoor Parade to the east of the town, both of them owned by the borough council. The pilot will see the community, the borough council and private owners working together to explore greater community ownership of businesses alongside community investment funding – the raising of non-transactional ‘community’ shares as a key source of funding for new businesses with explicit social objectives, and for existing businesses wanting to explore social ownership as a route to resilience and growth.

Reinvigorate neighbourhood planning as an approach

Empowering local communities and building engagement in energy communities will ultimately bring citizens into an engagement process with the local planning system. Navigating this system can be complex and frustrating for lay people to engage with. Neighbourhood planning, introduced by the Localism Act seeks “to hand power back to local communities” and as a tool to give people “the power to shape the future of their local area”. However, we know that neighbourhood planning has proved difficult for communities and has not been as successful in more urban, more deprived and more marginalized communities, those suffering most in the current energy crisis.

So far, West Lancashire Borough Council have received just one application for a neighbourhood plan, from Burscough Parish Council. An ‘energy community’ should be made aware of the ability to shape the local plan process through neighbourhood planning, and the planning team should track the development of the ‘Simpler Approach to Neighbourhood Planning’ pilots. This could be achieved through designating a neighbourhood planning champion who should work closely with the low carbon team.

Simpler Approach to Neighbourhood Planning pilot

The ‘Simpler Approach to Neighbourhood Planning’ pilot, overseen by the Department for Levelling Up, Housing and Communities, will support local councils to explore innovative ways to get even more people involved in community-led planning. Despite the benefits of creating a Neighbourhood Plan, currently less than 7% of existing plans are in the most deprived areas and only 5% are in urban areas.

<https://www.gov.uk/government/news/areas-selected-for-planning-pilots-for-deprived-communities>

Neighbourhood planning in a climate emergency

This guide to community engagement for low-carbon neighbourhood plans was written by the Centre for Sustainable Energy with funding from The Esmée Fairbairn Foundation and the endorsement of the Town & Country Planning Association. The publication, on its 3rd edition, explores the huge potential of neighbourhood plans to plan for and build a positive future for local communities, through addressing and responding to this, the most challenging issue of our times, climate change.

<https://www.cse.org.uk/downloads/reports-and-publications/policy/planning/renewables/neighbourhood-planning-in-a-climate-emergency-feb-2020.pdf>

Activity 11 - Support energy community infrastructure

Build internal capacity around the community energy sector

West Lancashire Borough Council, in developing a supportive platform for the growth of a community energy sector should first empower itself with the tools and resources to support the sector. Membership of Community Energy England,⁵ which is free, provides access to a range of resources, toolkits, case studies and networks to identify community energy projects and groups that could be learnt from closer to home.

Running between 2018 and 2022, mPOWER, a Horizon 2020 project facilitated a peer-to-peer learning programme among more than a hundred European local public authorities. They have produced an extensive set of guides which captured the knowledge and experience of the officers participating in the programme. The Building Energy Communities guide can provide some inspiration for establishing democratically owned and financed energy projects.⁶

‘When it comes to managing the energy transition the need for municipal level innovation has never been clearer’ - mPOWER

In building the councils Low Carbon team, to support the delivery of community energy ambitions, resources need to be made available to build internal skills and capacity to support the growth of a community energy sector, in partnership with local institutions (WLP), local businesses and local communities.

Take an active role in supporting Skelmersdale Community Energy Association

Skelmersdale Community Energy Association is in the early stage of its development and will be an important template for the borough as it grows further energy communities. The success or otherwise of the Skelmersdale Community Energy Association will be dependant on the support and advice it receives in this formative period. We would suggest that Skelmersdale Community Energy Association should be supported by West Lancashire Borough Council with officer support to enable it to grow and develop a sustainable ownership model.

⁵ <https://communityenergyengland.org/pages/local-authorities>

⁶ <https://municipalpower.org/best-practice-guides/>

Plymouth Energy Community (PEC)¹

PEC, established in 2014, empower the community to create a fair, affordable, zero carbon energy system with local people at its heart. They are a charity and a social enterprise, with a cooperative ethos. Plymouth Council had a distinct interest in the success of the project and provided seed funding to support its establishment and transition to a Community Benefit Society.

The company was structured in a way that allowed it to offer energy advice and energy efficiency work alongside its sister company, 'PEC Renewables', which was set up for asset ownership to deliver renewables projects.

PEC built the Ernesettle Community Solar farm in 2016 on council land that could not be developed or farmed. The land was transferred to the Four Greens Community Trust (FGCT) to develop a solar array. PEC generate income from the energy generation (with surplus helping to fund fuel poverty work) and pay FGCT an annual rent for the land (£18k in year one, then index linked in following years).

The combination of PEC and FGCT were crucial in obtaining local support for the solar array, and the two have continued to build trust in the local community. This relationship means that the council can now work with PEC and FGCT to deliver further projects, with a focus on supporting Plymouth's efforts to decarbonise the local transport system.

PEC has grown significantly since its establishment and is working with the council to make local renewable energy generation work for local people and businesses. They are exploring the potential of a private wire to provide electricity to a Southwest Water treatment works and have developed a local authority toolkit on synthetic Power Purchase Agreements, which helps councils to purchase energy directly from renewable energy generators (such as community energy projects).

Provide a supportive platform to grow the community energy sector

In building local energy communities, the council (and other public sector institutions) need to consider how they can provide a supportive platform to sustain and grow the community energy sector.

A West Lancashire Partnership wide recyclable community energy fund would help local initiatives get off the ground, with feasibility stages often the most difficult to fund. This could be viewed as an investment in securing future clean energy sources for institutions at current rates, providing greater certainty on future supply costs.

A clear policy which provides a route to market for community-owned generation should be developed, with a meaningful commitment to buy community-owned energy that is generated in West Lancashire, agreeing a price for the energy at an early stage before the infrastructure is built, limiting financial risks.

As the tools for a decentralised energy system develop over the coming years, West Lancashire Borough Council should ensure that community energy is placed at the heart of the agenda, from the digitalisation and the roll-out of Smart Local Energy Systems and Local Area Energy Planning,

Bristol City Council (BCC)

BCC winner of the Community Energy Local Authority Awards in 2019, has positioned itself as a facilitator when it comes to community energy and was recognised in the It does its best to support projects through to fruition; whether through investment in a community energy opportunity (as demonstrated at the Lawrence Weston Solar Farm), by helping groups navigate the council's decision pathways or getting community voices heard.

In 2018, BCC was the first UK council to declare a climate emergency. It has developed strong links with many different organisations across the city which in turn has provided additional connections and relationships with many of these members. BCC has also supported the Bristol Energy Cooperative, having worked with them to deliver solar projects on BCC assets over a number of years.

The Bristol City Council Energy Service is creating a clean energy strategy to benefit local communities, helping over 2,000 private and council-owned homes to become warmer, delivering a multimillion-pound solar investment programme on corporate and community buildings and establishing the best-practice recyclable Bristol Community Energy Fund, to support local community groups with sustainability and energy efficiency projects.

<https://www.bristol.gov.uk/policies-plans-strategies/the-energy-service>

Activity 12 - Enable a community owned decentralised energy system

Give clear support to community owned or led energy projects in the local plan

As the new Local Plan is developed and adopted, it should provide a policy which supports and encourages community energy schemes to come forward. The West Lancashire Low Carbon & Renewable Energy Study⁷ identified the need to develop community buy-in which would be addressed by building energy communities (as detailed above).

The study recommends a policy which supports and encourages 'locally connected' renewable and low carbon energy schemes, which provides a 'positive hook for potential energy developers looking to bring forward locally connected schemes that will benefit the community'. Evidencing the clear benefits to the community through ownership models that put wealth back into communities

Cornwall Local Plan - Policy 14

Support will be given to renewable and low carbon energy generation developments that:

- a. are '*led by*', or '*meet the needs of*' local communities; and
- b. create opportunities for colocation of energy producers with energy users, in particular heat, and facilitate renewable and low carbon energy innovation.

When considering such proposals, regard will be given to the wider benefits of providing energy from renewable sources, as well as the potential effects on the local environment; including any cumulative impact of these proposals.

'Led by' local communities

The proposed development has community involvement at the heart of the project's development process. Examples include:

- Proposals which are conceived in partnership between a community organisation and a developer (commercial or non-profit), or another party;
- Proposals which are supported, or promoted by a community at the planning or pre-planning stage.

'Meets the needs' of local communities

The proposal is capable of producing social, economic or environmental benefits which are inclusive and accessible to all within the local community over the lifetime of the project. Examples of such benefits include:

- Community ownership and control over renewable energy assets (and their energy and financial outputs);
- The generation of surpluses which can be spent by the local community;
- Cheaper and more secure local energy supply (which could be achieved through measures such as deployment of smart energy management technologies, energy storage and through community controlled energy supply);
- Benefits to the local environment which are identified and desired by the local community.

⁷ <https://www.westlancs.gov.uk/media/545133/20190522-final-lcre-study.pdf>

can support a tipping of the 'planning balance' in favour of development.

Identify a pipeline of renewable energy sites

The West Lancashire Low Carbon & Renewable Energy Study indicates a need to develop a pipeline of suitable areas for wind and ground mounted solar schemes. West Lancashire Borough Council is currently investigating the suitability of council owned land for a solar farm development. Initial investigations indicate an identified area of Council land could accommodate a 7MW solar PV installation which would have the potential to generate over 6.1million KWh of renewable electricity per year, giving annual savings of 1,462 tonnes of CO₂e, however it is unclear to what extent the community may benefit from this proposed development and the wealth it will build.

A number of sites (4) have been identified as least constrained opportunity areas for wind turbine schemes. In the current planning context, community wind farms present an advantage over commercially developed projects because they have more scope to comply with the 2015 ministerial statement, which states: 'A proposed wind energy development involving one or more turbines should not be considered acceptable unless it is in an area identified as suitable for wind energy development in the development plan; and, following consultation, it can be demonstrated that the planning impacts identified by the affected local community have been fully addressed and the proposal has their backing.'

West Lancashire Borough Council, through its role in the West Lancashire Anchor Network (suggested above) should collate an understanding of renewable energy potential on partners land and property, which can then be connected to the emerging community energy sector to deliver on. In opening a conversation with the community about energy transition, a call for sites can be opened up to identify community owned buildings, churches and private buildings that would

PowerPaired

A new, free online platform which provides a matchmaking service to bring together community energy groups and the owners of sites with potential for renewable energy generation. Created by sustainability NGO Forum for the Future, over 100 assets are already on offer from organisations such as the National Grid alongside churches, schools, offices and other sites across the UK that could potentially host a community-owned renewable energy project.

<https://www.powerpaired.org>

be willing to host a community-owned renewable energy project.

Develop a renewable energy funding approach

In delivering the ambitions of the Climate Strategy while building a community energy sector which builds community wealth, a detailed and continuous assessment of the funding landscape will need to be developed. There are a series of large-scale funds coming through to local authorities to support national goals in local regeneration, the retrofit of public buildings, and fuel poverty alleviation, and we would anticipate these growing over time as the timeframe for meaningful action shrinks and our climate targets get ever closer.

West Lancashire Borough Council can take advantage of the added benefits offered by community energy partnerships, while delivering on needed goals of reaching net zero and supporting local jobs and businesses. The Shared Prosperity Fund, Levelling Up Funding, the Public Sector Decarbonisation Scheme III, the Rural Community Energy Fund (RCEF), the Social Housing Decarbonisation Scheme and the Home Upgrades Scheme all need to be understood in the context of West Lancashire, understanding who is eligible for what and under what conditions.

In addition to central government funds, many local authorities are now looking to raise their own finance through innovative financial instruments such as Community Municipal Investments (CMIs), essentially climate bonds that allow retail investors to make a positive impact on the climate crisis. CMI's offer a powerful tool to allow councils all over the UK to accelerate their net zero plans. As well as offering a competitive alternative source of funding, they can also create real engagement with citizens and build the 'energy community' described above. The Bauman Institute at Leeds University has produced a useful 'Financing For Society Local Authority Guide',⁸ which assesses the suitability of crowdfunding for the public sector.

Community owned energy companies can also employ crowd funding mechanisms to raise the capital for renewable energy projects. Community share offers have become an important method also.

Abundance CMI case study - Camden

The Camden Climate Investment is looking to invest in directly fund local climate projects, including the installation of 80 further electric vehicle charging points to encourage residents to switch to electric vehicles, replacement of the Council's fleet of diesel and petrol vehicles with green alternatives, installing solar panels on public buildings to reduce carbon emissions and the cost of electricity.

The investment gives people the opportunity to get involved in and support projects in the Climate Action Plan. The investment offers a return of 1.75% interest per year fixed, before tax with the original investment back after five years.

Community Wealth Building Action Plan

Aim 1: Embedding a CWB approach in West Lancashire

	Lead	Timeframe (indicative start)
Activity 1 - Embed community wealth building as a driver of organisational transformation		
Steer CWB strategy document through council approval processes	Director of Transformation, Housing & Resources	Spring 2023
Identifying a designated CWB lead member	Director of Transformation, Housing & Resources	Spring 2023
Formalise oversight of CWB within the new political governance framework	Director of Transformation, Housing & Resources	July 2024
Establish an officer working group/board	Economic Development & Regeneration Manager	Spring 2023
Activity 2 - Embed community wealth building as the guiding principle of council strategy		
Incorporate CWB principles in the refresh of the local economic development strategy	Head of Wellbeing & Place	Ongoing
Review all council strategies upon refresh against CWB principles where appropriate	CMT	Ongoing
Create capacity within the Council to take this work forward	CMT	Ongoing

Activity 3 - Build support and motivation for the CWB programme externally		
Develop a West Lancashire Anchor Network	Economic Development & Regeneration Manager	October 2023

Aim 2: Building a more generative local economy

	Lead	Timeframe
Activity 4 - Developing an approach to progressive procurement		
Develop understanding of West Lancashire Borough Council supply chain	Procurement Manager	December 2023
Create social value policy and framework, including bespoke local monitoring approach	Procurement Manager	August 2023
Activity 5 - Supporting & growing local enterprise		
Build supplier intelligence	Procurement Manager	Commencing April 2023
Develop anchor network procurement pipeline	Procurement Manager	Once Anchor Network formulated (Activity 3)
Removing barriers to public procurement	North West Lancashire Chamber of Commerce	Upon completion of supplier intelligence raising (Activity 4)

Aim 3: Driving a just, low carbon transition

	Lead	Timeframe
Retrofitting the built environment		
Support the existing local retrofit sector		
Develop a detailed understanding of the local business base	Economic Development & Regeneration Manager	Ongoing
Support existing firm base to access local opportunities	Procurement Manager	
Support the existing firm base to recruit locally	More Positive Together Team	
Explore models of co-operation	Procurement Manager	Initiate November 2023
Grow the local retrofit sector		
Develop a strategic view of new firm requirements	Officer working group	Autumn 2023
Develop a detailed understanding of the skills gaps		Spring 2024
Work with local skills providers to develop skills pipelines		
Inspire younger people to pursue careers in retrofit		Ongoing
Develop a market for the local sector		
Programme the retrofit of West Lancashire Borough Council's public estate	Head of Housing Services	Autumn 2023
Programme the retrofit of West Lancashire council owned housing		Autumn/Winter 2023
Review Asset Intelligence Model in light of energy crisis		
Harness social value commitments to further support and grow the sector		Ongoing
Take an anchor network approach to asset decarbonisation		
Establish a West Lancashire Partnership Low Carbon Working Group	Environmental Sustainability Manager	Once Anchor Network formulated

Explore the potential of setting up a West Lancashire Partnership Low Carbon shared team		
Explore the potential of developing place-based funding ask of government		

	Lead	Timeframe
Building a decentralised energy system		
Engage communities in energy transition		
Empower local communities to engage in the agenda	Environmental Sustainability Manager	Ongoing
Explore the potential of developing a focal point for an energy community		
Reinvigorate neighbourhood planning as an approach	Planning Services Manager	Track government pilot
Build an energy community support infrastructure		
Build internal capacity to support the community energy sector	Environmental Sustainability Manager	Spring 2024
Take an active role in supporting Skelmersdale Community Energy Association		Ongoing
Provide a supportive platform to grow the community energy sector		
Build a community owned, decentralised energy system		
Give clear support to community owned or led energy projects in the local plan	Planning Services Manager	By 2024
Identify a pipeline of renewable energy sites		

Review the potential of developing a renewable energy funding approach	Environmental Sustainability Manager	To be agreed
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Appendix 1: Community Wealth Building Narrative for Leisure Services Contract

Introduction

West Lancashire Borough Council are currently in the process of procuring their Leisure Services Contract for the next ten years. As well as seeking a supplier that will deliver an effective and efficient service, they are also seeking one which will deliver wider benefits for the West Lancashire economy and its people and contribute towards addressing wider social and environmental challenges. Running parallel to the procurement, the Centre for Local Economic Strategies (CLES) are also working with West Lancashire Borough Council to produce a Community Wealth Building Strategy – a mechanism through which economic development can be shifted to bring more cooperation between local institutions and bring maximum benefit for the West Lancashire economy and its people.

This short document therefore seeks to align the Leisure Services procurement and the emerging Community Wealth Building Strategy by developing a narrative about Community Wealth Building that can be included in the tender documentation and potentially utilised in future procurements at the Council and other Anchor Institutions. It also details some common considerations for West Lancashire Borough Council when evaluating responses to questions in procurement around Community Wealth Building/Social Value.

The Draft Narrative

As part of every procurement exercise that it undertakes, West Lancashire Borough Council seeks to realise the best possible price for the goods, services or works which they are looking to buy and ensure that the chosen supplier has suitable experience and history in providing good quality and similar goods, services or works. West Lancashire Borough Council also seeks to ensure that the chosen supplier will bring benefits for the West Lancashire economy and its people and contribute towards addressing wider social and environmental challenges.

We call this approach to delivering wider benefits Community Wealth Building and it applies as much to our internal behaviour as a Council as it does to our expectations of suppliers delivering contracts on our behalf. Community Wealth Building seeks to ensure that everything we do as a Council brings maximum economic, social and environmental benefit for our residents. So, this means:

- Engaging with and supporting local West Lancashire businesses to develop and grow and improve levels of employment, skills and health and well-being.
- Where possible, supporting those residents from more deprived parts of West Lancashire into employment opportunities at the Council and other key local Institutions.

- Having procurement processes which enable suppliers to demonstrate how they will contribute towards our Community Wealth Building objectives and in turn deliver Social Value in the delivery of contracts.
- Managing our land and Council owned assets in a way that enables use by local Voluntary, Community and Social Enterprise Sector organisations.
- Using our finances in a way that benefits West Lancashire people and not in a way where wealth is extracted for the benefit of distant shareholders.
- Supporting more generative businesses (such as Cooperatives and Social Enterprises) to develop and shift the ownership model of our economy.
- Through our procurement processes and our weighting around Social Value of 10%, we also expect businesses and other organisations to contribute towards and support the Council to deliver upon these Community Wealth Building principles and objectives. So, we expect suppliers to:
 - Think about their own supply chains for the delivery of the contract and demonstrate the extent to which their own suppliers and sub-contractors are based in West Lancashire and utilise West Lancashire labour in their workforces.
 - Think about their own direct workforce and demonstrate the extent to which they are from West Lancashire (and particular deprived neighbourhoods) and also showcase policies and practices they have in place around ethical employment (Living Wage) and workplace health and well-being.
 - Think about Social Value and demonstrate how in addition to the delivery of the contract they are going to deliver a range of other benefits for the West Lancashire economy and its people and in turn address social and environmental challenges. These additional benefits could include: the creation of new jobs and apprenticeships, volunteering in the local community, improving the skills of the local future workforce, and reducing the distances goods travel.
 - Think about their own land and assets and demonstrate how they can be utilised for community activity during the delivery of the contract.
 - Think about their own supply chains and demonstrate the extent to which they work with Small to Medium Sized Enterprises (SMEs), Cooperatives and Social Enterprises, for example.

As part of this procurement opportunity around {ADD NAME OF CONTRACT}, we would anticipate that potential suppliers respond to the following questions around Social Value:

{ADD QUESTION}

{ADD QUESTION}

{ADD QUESTION}

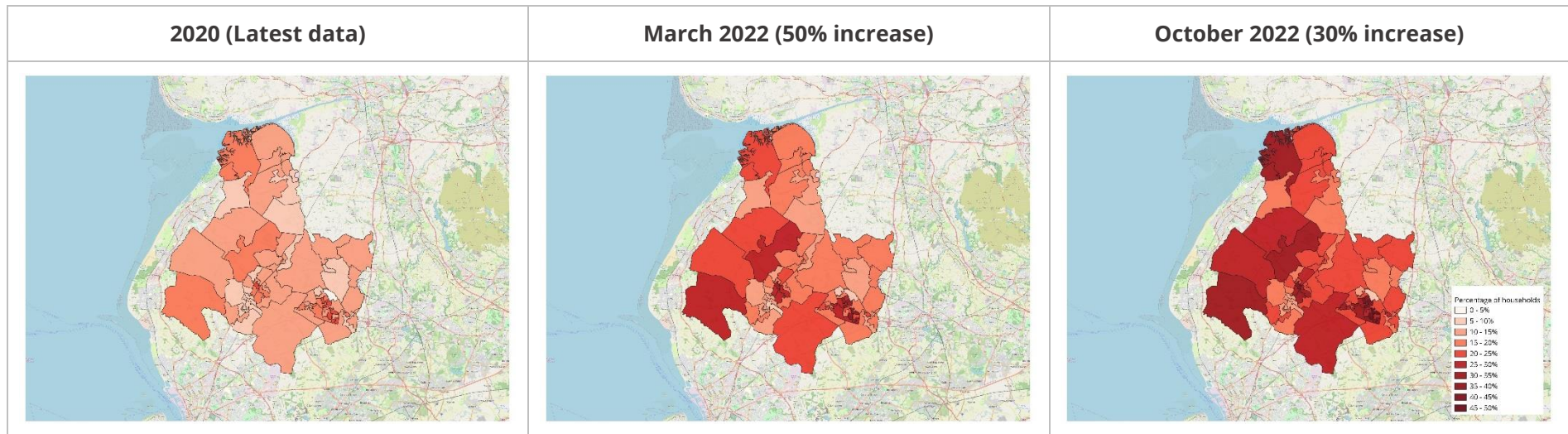
Common considerations when evaluating for Social Value

Local authorities are increasingly weighting procurements with a specific Social Value weighting (often upwards of 10%). However, they often face challenges in evaluating responses, as responses from potential suppliers can be subjective, and can often look very similar. The

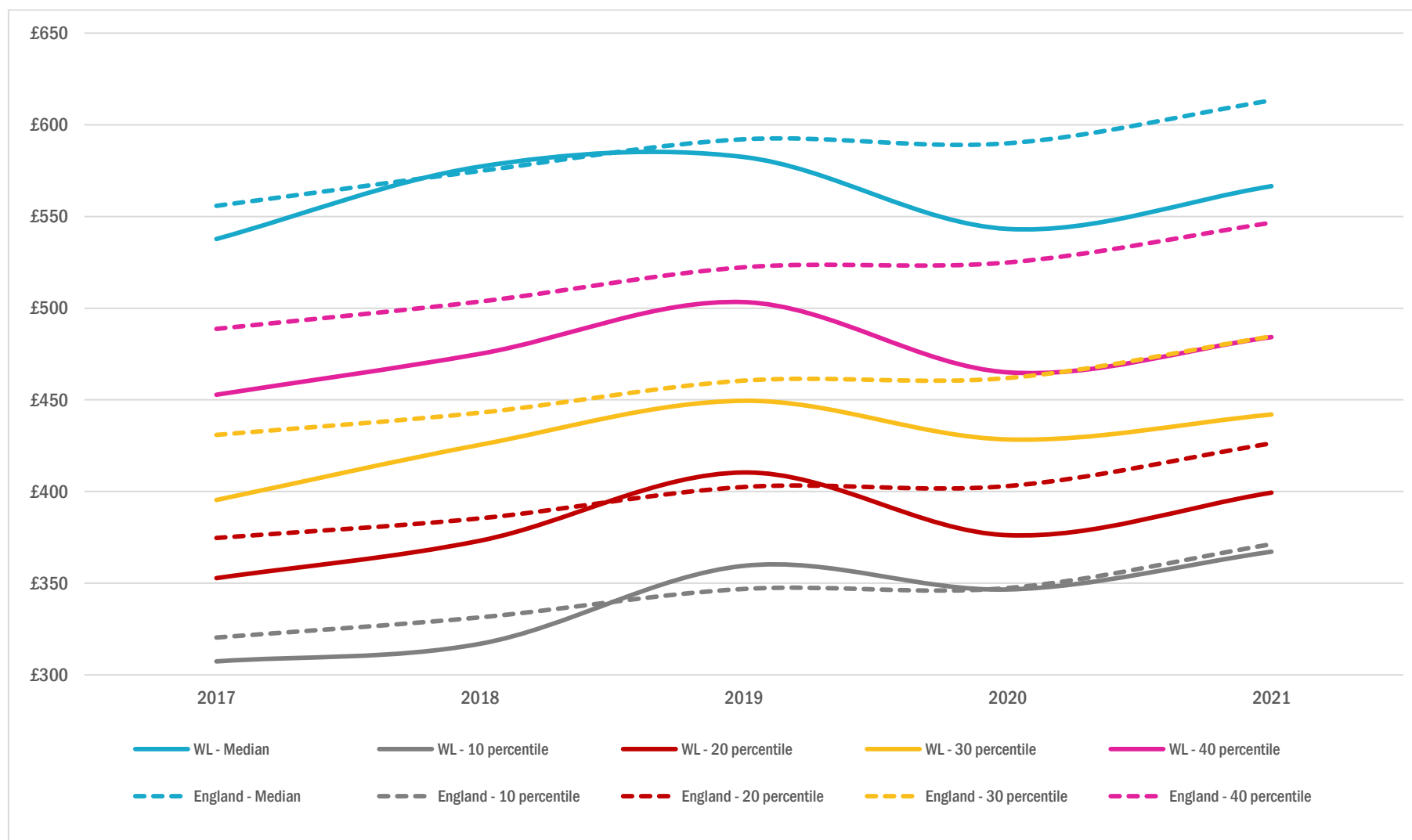
following therefore sets out some key consideration for service managers/commissioners and procurers when designing and evaluating Social Value questions and responses:

- Make sure the outcomes are clear – the first consideration is to make sure you are clear as a Council exactly what you want to achieve around Social Value. This means having a clear and well defined set of outcomes that you want to achieve and a robust Social Value Procurement Policy and Framework.
- Make sure the questions you ask are specific – the second consideration is to make sure that you ask specific questions around Social Value and that link directly back to the outcomes detailed in the first consideration. DO NOT ask ‘what Social Value are you going to create as part of this contract’. DO ask ‘how many jobs are you going to create’, ‘how long will these jobs be for’, ‘what opportunities will there be for progression’, ‘where are you going to recruit from for these jobs’.
- Make sure you don’t evaluate what a potential supplier is doing already – the whole point of Social Value is that suppliers deliver additional economic, social and environmental benefits for your place. Whilst it is good to understand the Social Value activities they are already undertaking, for the purposes of evaluation it has to be relevant to the good, service or work you are procuring and it has to be additional to what a supplier would be doing anyway.
- 1 Apprenticeship may be better than 5 – evaluation cannot just be done on a purely quantitative basis with potential suppliers offering 5 apprenticeships scoring more than those offering 1. The quality and timeframe of these apprenticeships need to be explored in more depth as part of the evaluation process which is why you need to ask specific questions.
- The Social Value offer needs to be measurable – a Social Value response, much like timeframe and budget responses should be binding in the contract with the successful supplier and should be contract managed during delivery. This means that during evaluation you need to explore whether the Social Value offer by each supplier is measurable – will the supplier be able to monitor outputs, outcomes, and impacts.

Appendix 2: Fuel poverty in West Lancashire



Weekly earnings (full time) – West Lancashire vs England

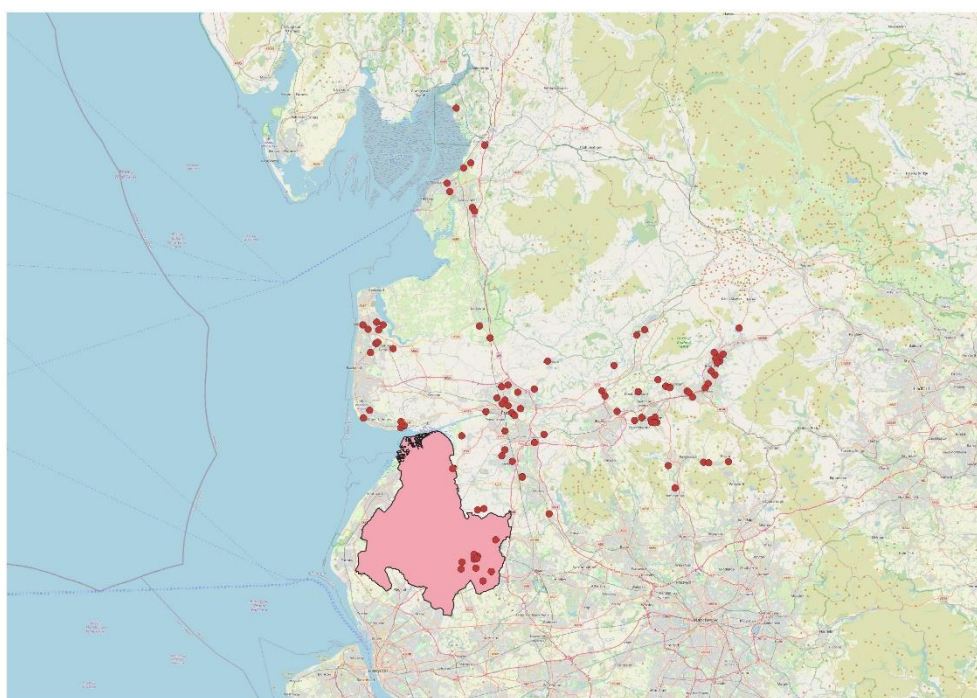


Source: Annual survey of hours and earnings - resident analysis

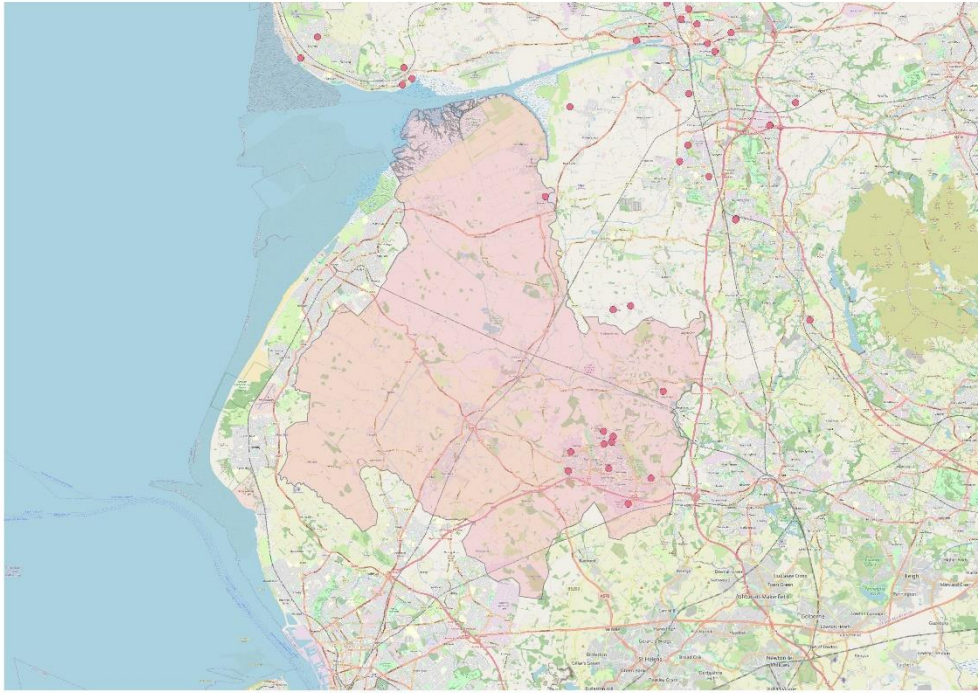
Appendix 3: Local retrofit sector

Lancashire has 151 TrustMark⁹ registered suppliers in a range of retrofit sectors, however only 11 of these are based in West Lancashire.

Lancashire based TrustMark accredited suppliers	No.
Retrofit Assessor/Co-ordinator	73
Insulation (Wall/Roof/Floor)	26
Heating Engineers	19
Air Source Heat Pump Installers	10
Ground Source Heat Pump Installers	7
Solar Panel Installers (PV)	6
Solar Panel Installers (Thermal) [MCS]	4
Energy Efficient Glazing and Doors	3
Draught Proofing	1
Wind Turbine Installers [MCS]	1
Biomass Boiler Installers [MCS]	1

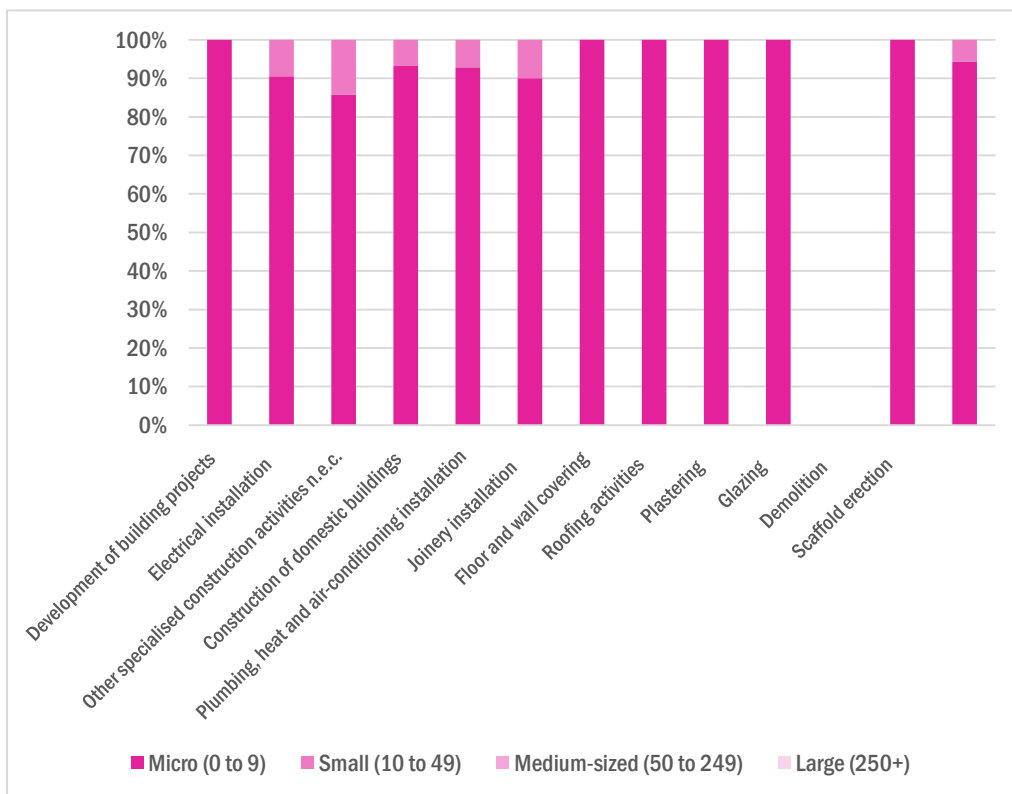
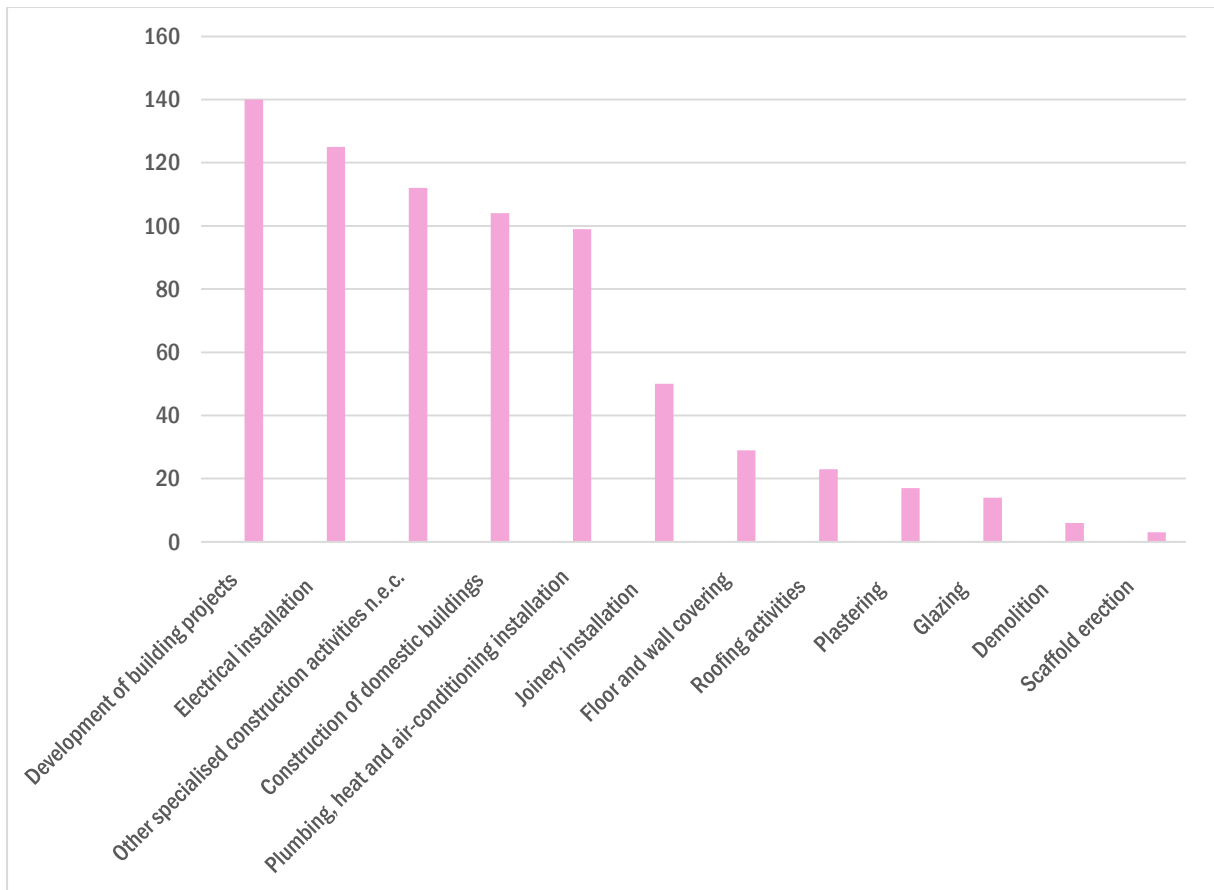


⁹ TrustMark is a Government Endorsed Quality Scheme covering work a consumer chooses to have carried out in or around their home.



	Air Source Heat Pump Installers	Ground Source Heat Pump Installers	Heating Engineers	Retrofit Assessor/Co- ordinator	Solar Panel Installers (PV)	Solar Panel Installers (Thermal)
Amy Mansfield				Y		
Benjamin Burke				Y		
David Goodier				Y		
David Jones				Y		
GE National	Y		Y		Y	
Huyton Plumbing & Heating Limited	Y				Y	Y
Kevin Cassidy				Y		
Laura Sallery				Y		
Michael Penman				Y		
Plum-UK Limited	Y	Y				
Stephen Edwards				Y		

While the TrustMark database indicates a small specified retrofit sector locally, exploring the West Lancashire business base, we have identified 722 West Lancashire businesses who operate in what you would identify as 'retrofit' sectors. These are overwhelmingly micro enterprises, with 93% of these businesses employing under 10 people and the remaining 7% of businesses employing between 10 and 49 people. There are no medium sized or large business in these 'retrofit' sectors based in West Lancashire. These construction based firms may have the potential to develop retrofit specialisation and support deep retrofit activities locally.





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