

# BLACK COUNTRY LOCAL ENTERPRISE PARTNERSHIP PROFILE

June 2020

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This document should be cited as:

LIPSIT (2020) 'Black Country Local Enterprise Partnership Profile'. Local Institutions, Productivity, Sustainability and Inclusivity Trade-offs (LIPSIT) working paper.

Local Institutions, Productivity, Sustainability and Inclusivity Trade-offs (LIPSIT) is an [ESRC](#) (Economic and Social Research Council) funded collaborative project with Demos and the Universities of Birmingham, Cardiff, Surrey and Warwick. The aim of the project is to identify institutional and organisational arrangements at the regional level that tend to lead to the 'good' management of policy trade-offs associated with increasing productivity, and to make recommendations based on this. For further details of our research please visit [www.LIPSIT.ac.uk](http://www.LIPSIT.ac.uk).



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## Introduction

This profile of the Black Country Local Enterprise Partnership (BCLEP) provides a detailed account of the region's devolved structure and data relating to key aspects of the economy, including: innovation, business, infrastructure, people, place and the environment.

## Black Country Local Enterprise Partnership

The Black Country Local Enterprise Partnership (BCLEP) is one of 38 (previously 39) private sector-led LEPs created to facilitate financial planning, regeneration, transport and labour market interventions at the local level. BCLEP was formally established in November 2010 and officially approved by government in January 2011. It is one of six LEPs in the West Midlands region and one of three LEPs covering the West Midlands Combined Authority (WMCA). The BCLEP has a population of just over 1.19 million and is comprised of the boroughs of Dudley, Sandwell, Walsall and Wolverhampton.

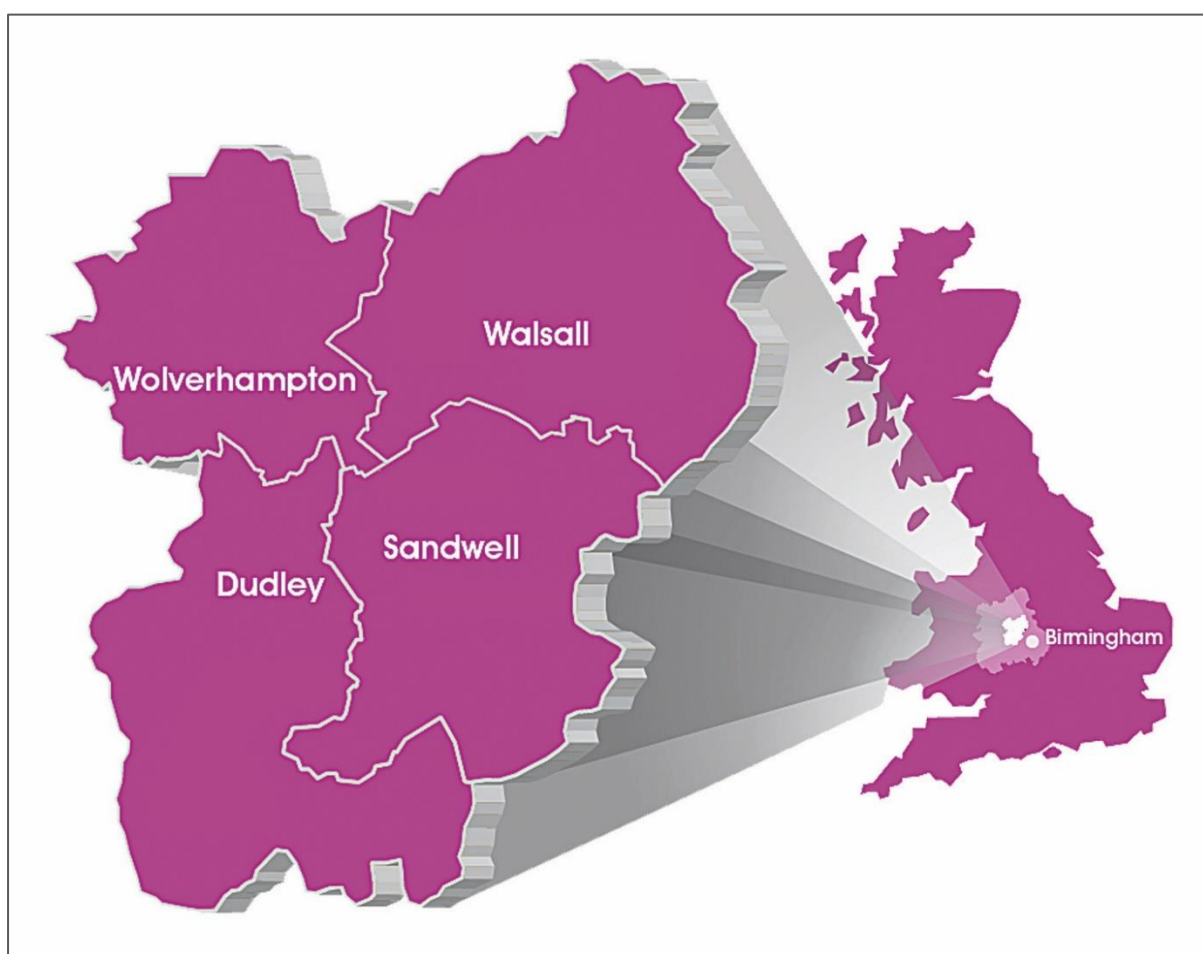


Figure 1: Geography of the Black Country LEP (Source: [BC LEP](#))

The BCLEP Board is made up of 18 members, the details of which can be found in Table 1 below.

<b>Board Members</b>	
Tom Westley DL	Chairman Westley Group, LEP Board Chair, Enterprise Zone Board Lead
Dr Chris Handy OBE	Chief Executive, Accord Group LEP Board Deputy Chair and Social Enterprise, Housing and Low Carbon Board Lead
Councillor Mike Bird (Conservative)	Leader of Walsall Council
Councillor Ian Brookfield (Labour)	Leader of Wolverhampton Council
Paul Brown	Director of Government Services, Ernst and Young
Councillor Yvonne Davies (Labour)	Leader of Sandwell Council
Kevin Davis	CEO Vine Trust Group, Chair of the Ladder Apprenticeship Foundation
Rachel Eade MBA	Director RED Ltd
Cherry Elliot	Partner and Head of property Higgs and Sons Solicitors
Simon Eastwood	Partner – Eastwood Consult Planning Board Lead
Lindsey Flynn	CE, WELL Associates Ltd, Common Wealth Games Board Lead and Small Business Champion
Councillor Patrick Harley (Conservative)	Leader of Dudley Council
Ninder Johal DL	Managing Director, Nachural Corporate Communications
Professor Geoff Layer	Vice-Chancellor, University of Wolverhampton
Professor Nazira Karodia	Prof of Science Education, Dean of Faculty of Science and Engineering, University of Wolverhampton
Jatinder Sharma OBA	Principal and Chief Executive, Walsall College
Amanda Tomlinson	CE, Black Country Housing Group
Deborah Williams	Chair Active Black Country

Table 1: BCLEP Board Members

For a full overview of the BCLEP's governance structure see **Appendix A**.

Following the government's commitment in 2013 to negotiate Growth Deals with every Local Enterprise Partnership (LEP), LEPs were tasked with developing multi-year strategic economic plans (SEPs) to demonstrate their commitment to the growth agenda and to set out their priorities in return for freedoms, flexibilities and influence over resources from government and a share of the Local Growth Fund.

Through the delivery of their first SEP in 2014 - [\*'Made in the Black Country: Sold are the World'\*](#) - the BCLEP set out their growth vision alongside their short- and mid- term strategies for delivery in line with six key themes (see **Appendix B** for a full account of performance targets and proposed strategies):

1. Growing business base
2. Building on sector strengths
3. Stimulating innovation
4. Improving skills
5. Improving connectivity
6. Housing and other assets

*“Our aim is to grow our global supply chain with the world class skills it demands, to maximise the benefits of our location, to exploit our industrial and geological heritage and to provide high quality housing to meet the needs of a balanced growing population”*

BCLEP Vision Statement 2014

Then in 2017, the BCLEP proposed a refreshed strategy – [Black Country Strategic Economic Plan 2017](#) – that set out the following priority areas (see also Figure 2):

- High Value Manufacturing City: a series of interventions to accelerate the growth of high value manufacturing businesses in the Black Country, including action to improve the quality of existing employment locations;
- The Black Country: business competitiveness: a programme to strengthen our business base by creating the conditions for higher levels of business birth, growth and survival and to enable Black Country businesses to improve their productivity and competitiveness;
- Economic Capital: action to seek maximum economic benefit from our strategic centres and ensure that they contribute to the attractiveness of the Black Country as a place to live, work, visit and invest;
- Black Country Garden City: a programme to accelerate house building and improve our housing mix by treating our supply of brownfield land as an opportunity for place-shaping and the creation of sustainable communities;
- Skills for Business, Skills for Life: action to ensure that our skills system can meet the needs of businesses and enable Black Country residents to benefit from growth;
- Connected Black Country: a programme of investment in broadband and in transport to support growth by enabling the movement of goods and people.



Figure 2: BCLEP Growth Vision (Source: [Black Country Strategic Economic Plan, 2017](#))

See Figure 3 below for an overview of funding received by the BCLEP between 2015 and 2019 and Table 2 for a breakdown of external funding.

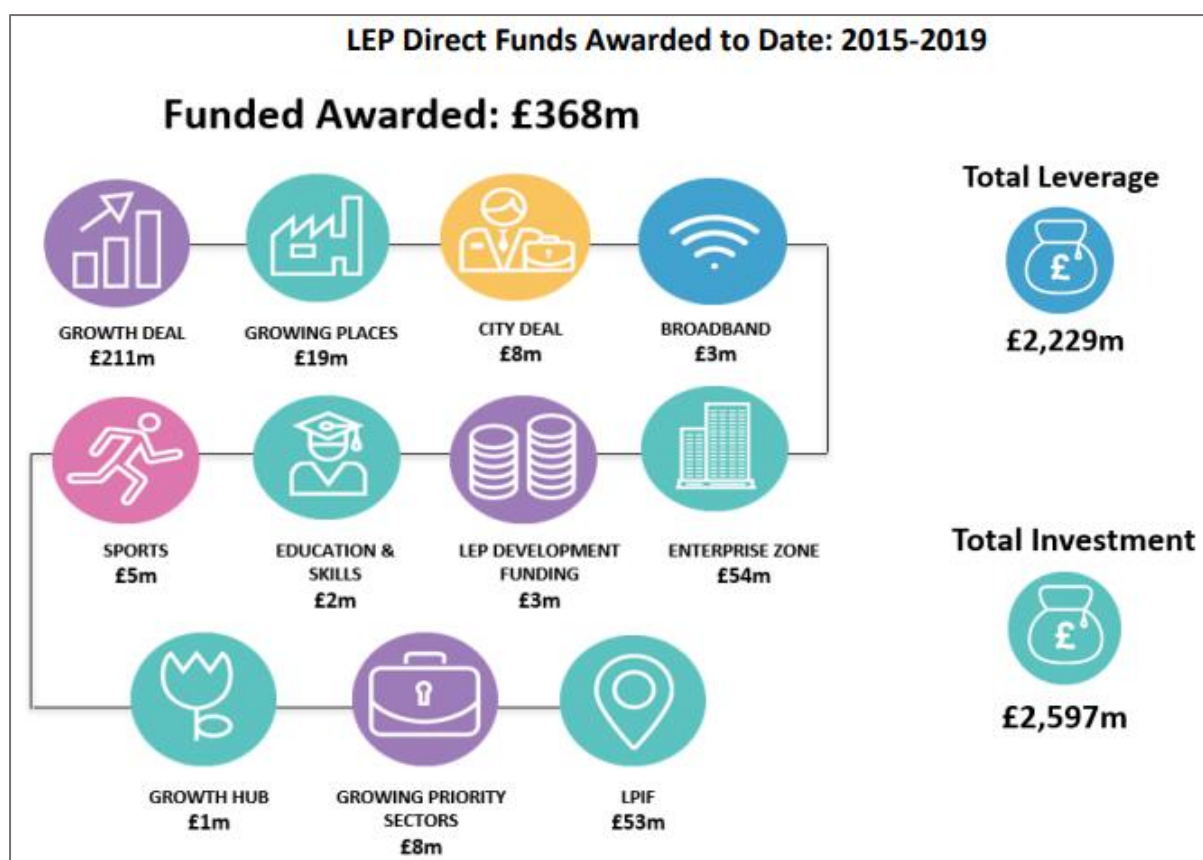


Figure 3: BCLEP direct funds awarded, 2015-19 (Source: [Black Country LEP Delivery Plan 2019/20](#))

	Total (£m)	Per Head (£)
Regional Growth Fund 2011-12 to 2016-17	19.9	17.5
Growing Places Funding 2011-12	14.5	13
Growth Deals 2014-2021	217.8	187
European Structural and Investment Fund 2014-2020	151.6	129

Table 2: BCLEP External Funding (Source: [Smart Specialisation Hub 2019](#))

See **Appendix 3** for a more detailed summary for BCLEP direct funds.

Additional funding:

- Through the WMCA, the Black Country has received £58m worth of funding, leveraging a further £10m to take total investment to £68m. This has predominantly been invested into transport projects, with a smaller amount going to the Adult Education Budget allocation.
- Other Black Country influenced funds have resulted in a further £687m funding awarded to the Black Country. This is split between **European Union** funding via EUSIF (£163m) and transport (£524m) – with leverage taking total investment above £1.5bn.

The BCLEP plays a vital role as part of the West Midlands Combined Authority (WMCA) and is responsible for helping to drive forward the [WMCA Local Industrial Strategy](#) (LIS). The [Black Country Local Implementation Plan 2019/20](#) reflects much of the content and ideas set out in the WMCA LIS but is more specific to the Black Country, ensuring that BCLEP businesses and communities benefit as much as possible through the delivery of strategic programmes.

## Black Country LEP Key Statistics

In Table 3 below, figures for the BCLEP are shown for a number of key indicators related to prosperity, inclusivity and sustainability. Figures for the UK are also provided as a baseline to assess regional performance according to latest data and over a 5-year period.

	BCLEP		UK	
	2018	% change 2013-18	2018	% change 2013-18
GVA per/hour	75.5	<b>3.1</b>	100	<b>2.0</b>
Median gross weekly pay for full-time workers	501.3	<b>10.8</b>	568.3	<b>9.8</b>
Employment rate 16-64	68.7	<b>5.7</b>	75.0	<b>5.3</b>
% of total employees in low pay sectors <sup>1</sup>	31.1	<b>-4.0</b>	33.7	<b>-1.7</b>
% of workers in high-skilled occupations (SOCs 1, 2, 3)	12.0	<b>8.9</b>	14.9	<b>5.5</b>
% of working-age population with NVQ Level 2+ quals.	60.7	<b>0.5</b>	74.9	<b>3.7</b>
% in-work households with and without children receiving child and/or working tax credits	37.8	<b>-13.1</b>	22.1	<b>-29.1</b>
20:20 ratio of median weekly pay (gross), ft workers	2.07	<b>-1.3</b>	2.27	<b>-0.02</b>
Ratio of lq. house price to lq. earnings <sup>2</sup>	5.9	<b>7.8</b>	7.3	<b>11.1</b>
Life Expectancy (females)	81.8	<b>-0.5</b>	82.9	<b>0.2</b>
% of total connections receiving superfast broadband (>= 30 Mbits) (years = 2016-18)	60.8	<b>61.7</b>	55.3	<b>36.5</b>
% of workless households	19.1	<b>-14.7</b>	14.5	<b>-16.2</b>
CO2 per capita emissions (t) (years = 2017, 2013-17)	4.0	<b>-21.9</b>	4.5	<b>-23.7</b>
Total residual fuel consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	0.1	<b>5.1</b>	0.3	<b>-9.3</b>
Total transport energy consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	0.41	<b>-1.4</b>	0.57	<b>-0.3</b>
Motor vehicle traffic per capita, vehicle miles <sup>3</sup>	3410	<b>1.3</b>	5083	<b>4.2</b>
Municipal waste generation, tonnes per capita <sup>4</sup>	0.44	<b>-3.5</b>	0.66	<b>-4.3</b>
% of household waste sent for recycling/reuse/composting <sup>5</sup>	37.1	<b>-12.1</b>	43.0	<b>-0.5</b>

Table 3: Key Statistics

<sup>1</sup> UK = Data for Great Britain

<sup>2</sup> UK = Data for England and Wales

<sup>3</sup> UK = Data for Great Britain

<sup>4</sup> UK = Data for England, 2014-18

<sup>5</sup> UK = Data for England, 2014-18



This data was used to develop a regional typology to assess the productivity, inclusivity and sustainability of all UK regions in relation to the nature of their economies and their outcomes over time. Table 4 below shows the results of this typology for the BCLEP, indicating its performance in relation to all other regions in England (LEPs and CAs), Wales and Scotland.

	LEVELS (2018)			CHANGE (2013-2018)		
	PROSPERITY	INCLUSIVITY	SUSTAINABILITY	PROSPERITY	INCLUSIVITY	SUSTAINABILITY
BCLEP	LOW	LOW	HIGH	MEDIUM	LOW	MEDIUM

Table 4: BC LEP performance on prosperity, inclusivity and sustainability (levels and change)

LOW = Q1; MEDIUM = Q2 and Q3; HIGH = Q4

The results indicate the following for the BCLEP:

**Prosperity** - performance low but improving in line with other regions

**Inclusivity** - performance low and improving slowly compared to other regions

**Sustainability** - performance high and improving in line with other regions



<b>PROSPERITY</b>	<b>75.5</b> GVA per/hour (index) (UK=100) <b>↑ 3.1%</b> 2013-18	<b>£501.3</b> Median gross weekly pay for full-time workers <b>↑ 10.8%</b> 2013-18	<b>68.7%</b> Employment rate 16-64 <b>↑ 5.7%</b> 2013-18	<b>31.1%</b> of total employees in low pay sectors <b>↓ 4.0%</b> 2013-18	<b>12.0%</b> of workers in managerial, professional and technical occupations <b>↑ 8.9%</b> 2013-18	<b>60.7%</b> of working age population with NVQ2+ quals. <b>↑ 0.5%</b> 2013-18
<b>INCLUSIVITY</b>	<b>37.8%</b> In-work households receiving child and/or working tax credit <b>↓ 13.1%</b> 2013-18	<b>2.1</b> 20:20 ratio of median weekly pay <b>↓ 1.3%</b> 2013-18	<b>5.9</b> Ratio of lower quartile house price to lower quartile earnings <b>↑ 7.8%</b> 2013-18	<b>81.8</b> Female life expectancy <b>↓ 0.5%</b> 2013-18	<b>60.8</b> of premises with access the superfast broadband <b>↑ 61.7%</b> 2016-18	<b>19.1%</b> of workless households <b>↓ 14.1%</b> 2013-18
<b>SUSTAINABILITY</b>	<b>4.0</b> CO2 per capita emissions <b>↓ 21.9%</b> 2013-17	<b>0.1</b> Total residual fuel consumption (tonnes of oil equivalent per capita) <b>↑ 5.1%</b> 2013-17	<b>0.41</b> Total transport energy consumption (tonnes of oil equivalent per capita) <b>↓ 1.4%</b> 2013-17	<b>3410</b> Motor vehicle traffic (vehicle miles per capita) <b>↑ 1.3%</b> 2013-18	<b>0.44</b> Municipal waste generation (tonnes per capita) <b>↓ 3.5%</b> 2013-18	<b>37.1</b> of household waste sent for recycling/reuse/composting <b>↓ 12.1%</b> 2013-18

Productivity in the Black Country is considerably less than the national average. Looking at GVA/hour as the best proxy measure of productivity available, Figure 4 shows that GVA/hour worked has been consistently less than the UK average over a 5 year period (2013-18). In 2018, GVA/hour in the Black Country was £26.5 compared to £35.0 for the UK. It should be noted that the data used in Figure 4 should not be used to compare GVA/hour between years but only within years.

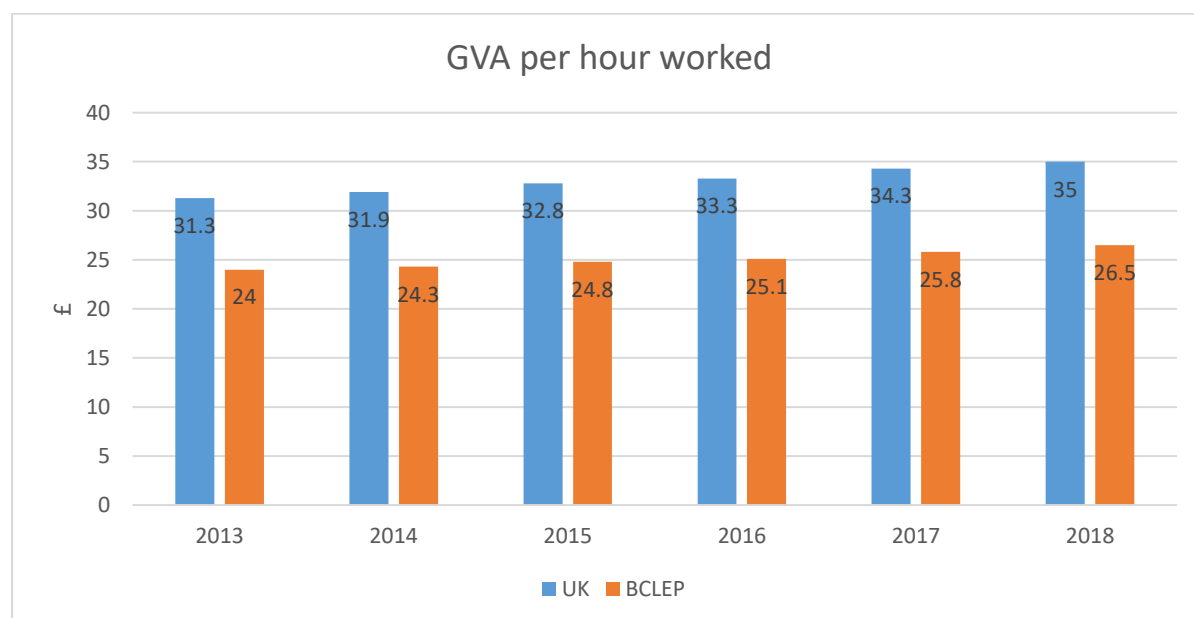


Figure 4: GVA per hour worked (£), nominal (smoothed) (Source: ONS)

Now turning to look at the growth of GVA/hour in the Black Country over a 5-year period, Figure 5 below provides a mixed picture of performance. GVA/hour in the BCLEP showed positive signs of growth between 2013 and 2014 when national productivity stagnated, but then growth fell until 2016. Between 2016 and 2018 GVA/hour in the Black Country was again growing faster than the national average.

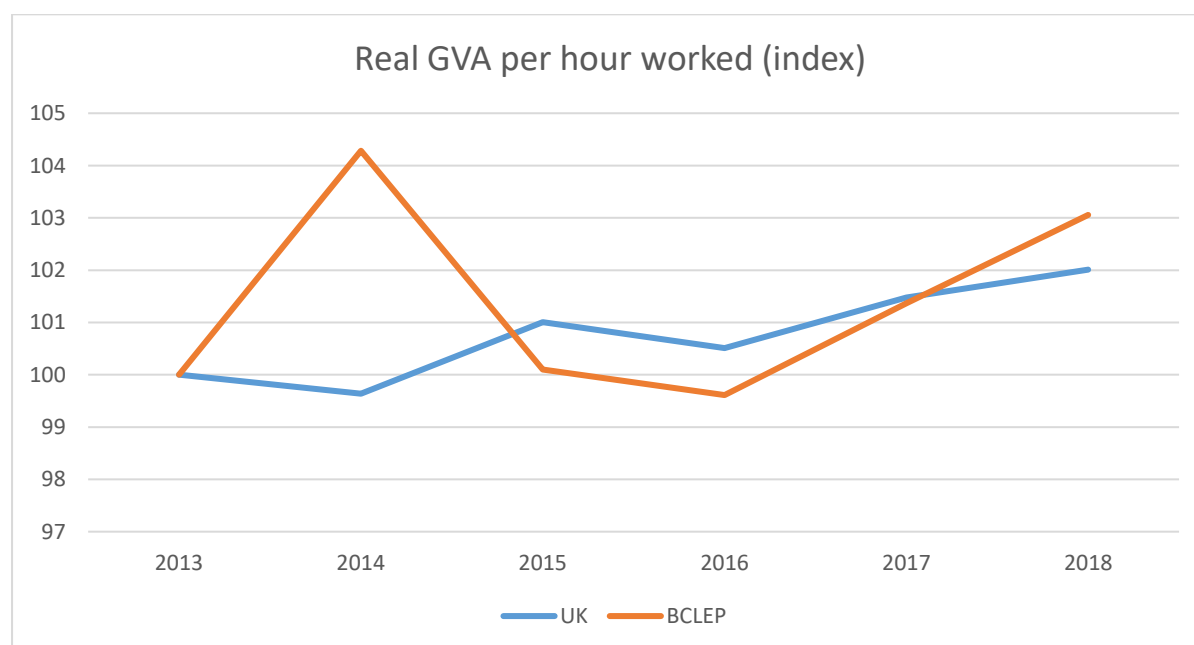


Figure 5: Real GVA per hour worked (index) (Source: ONS)

## 1. Innovation

Figure 6 and Tables 4-5 below provide an initial indication of the strength of the innovation environment in the BCLEP. Figure 6 gives an approximation of the extent to which firms are engaged in different types of innovation activity in the BCLEP area, including the lowest and highest proportions for each metric of all LEP areas as benchmarks. This data shows that the BCLEP performs strongly in innovations related to 'work organisation' and to a lesser extent 'collaboration'. The BCLEP performs particularly less well in innovations related to 'radical innovation'.

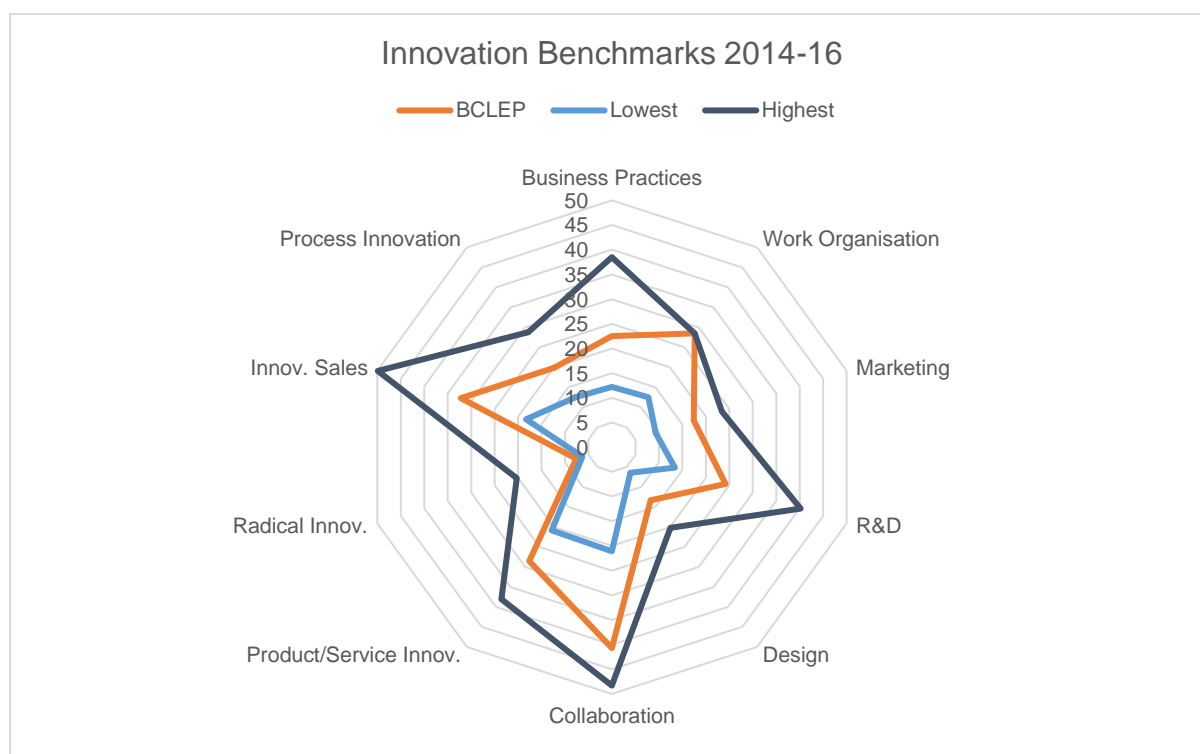


Figure 6: Innovation Benchmarks (Source: Roper and Bonner, 2019)

	Business Enterprise Spending on R&D		Higher Education Spending on R&D	
	£/FTE	Benchmark relative to average LEP value	£/FTE	Benchmark relative to average LEP value
Black Country	950	1.17	450	2.14

Table 5: Spending on R&D, 2014 (Source: Smart Specialisation Hub)

	Interactions between HE Institutions and Business			
	Consultancy	Benchmark relative to average LEP value	Contract Research	Benchmark relative to average LEP value
Black Country	8920	1.70	234	0.03

Table 6: Interactions between HE Institutions and Business: Income for consultancy and contract research for SME's and large businesses, HEBCI, 2014/15-2015/16 (average over 2 years) (Source: Smart Specialisation Hub)

Table 5 above shows that the BCLEP performs above average in terms of business enterprise spending on R&D, with £950 spent for each full-time equivalent job and a benchmark relative to the average LEP value of 1.17. Also shown in Table 5 is higher education spending on R&D where the BCLEP performs particularly strongly with £450 spent for each full-time equivalent job and a benchmark relative to the average LEP value of 2.14. The BCLEP also outperforms the average for all LEPs on the number of interactions between HEIs and business in terms of consultancy (a total of 8920 interactions between 2014 and 2016 and a benchmark of 1.7) but performs very poorly in terms of contract research (a total of 234 interactions between 2014 and 2016 and a benchmark of 0.03).

The **University of Wolverhampton** is BCLEP's only university with a total of 19,045 students enrolled between 2016/17 – 2018/19 (Source: HESA). The University of Wolverhampton is not considered a research intensive university, reflected in Figure 7 below which shows the BCLEP falling well below the LEP average for involvement in innovation research production.

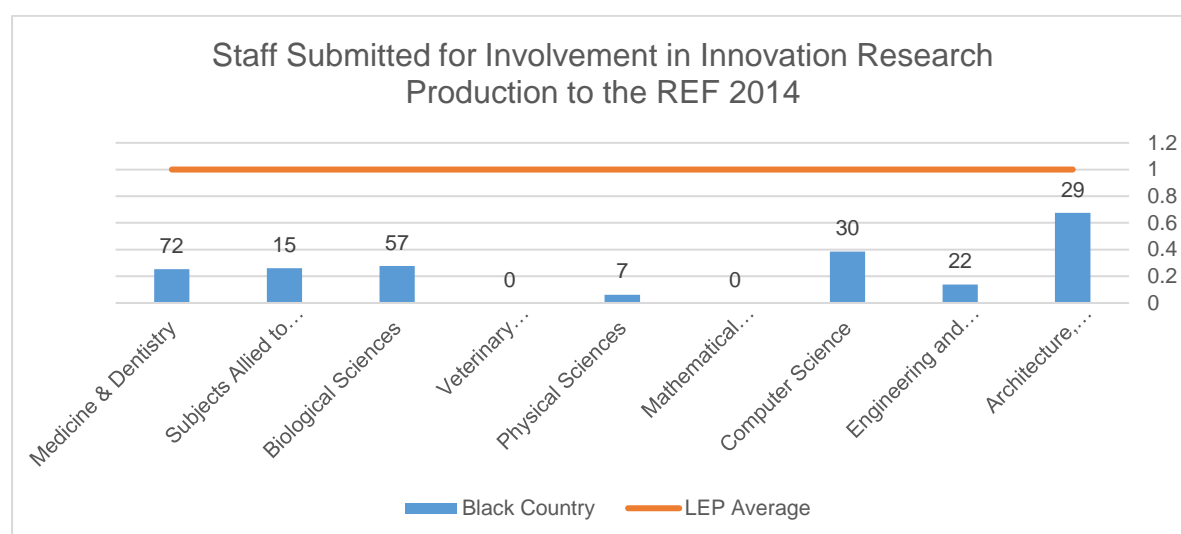


Figure 7: Staff submitted for involvement in innovation research production to the REF 2014 (Source: [Smart Specialisation Hub](#))

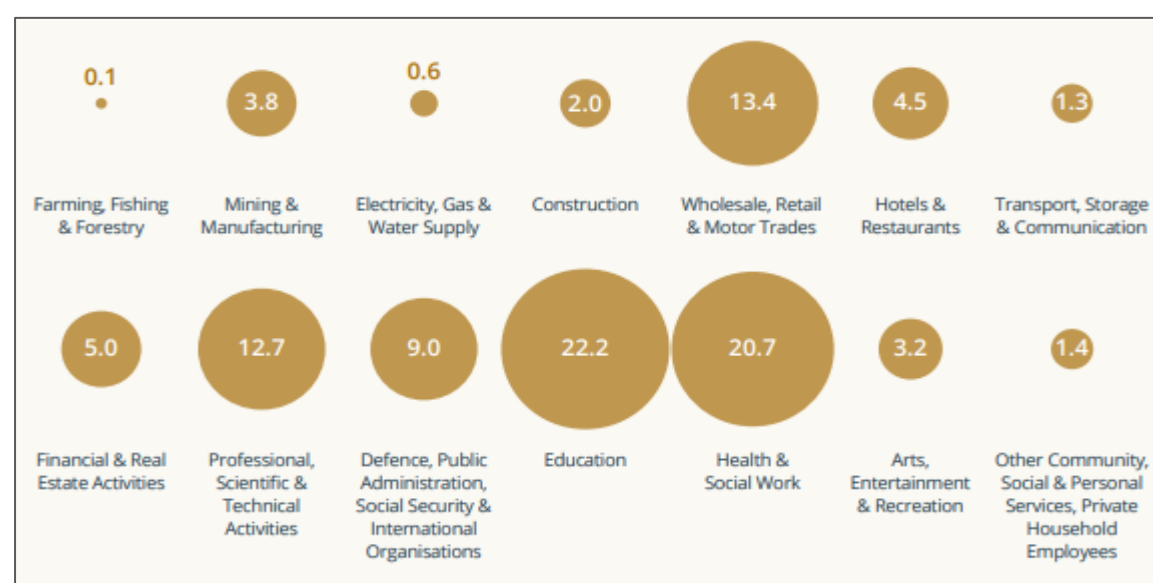


Figure 8: Employment of first degree graduates across industry sectors (%) (Source: [Smart Specialisation Hub](#))

Figure 8 below provides a breakdown of employment of First Degree Graduates across industry sectors. The largest sector is Education (22.2%) followed by Health and Social Work (20.7%).

Relative to the LEP average, the BCLEP has low numbers in employment in science and technology sectors as shown in Figure 9. However, these could be boosted in the coming years by the opening of the region's only **Science Park** at the University of Wolverhampton - a £10.1m centre completed in late 2018 offering specialist space for science, technology and engineering businesses and catering for aerospace, automotive, building technology and life science sectors. The project was part-funded through a £4.8 million grant from the BCLEP as part of the Growth Deal and £5.3 million invested by the University of Wolverhampton.

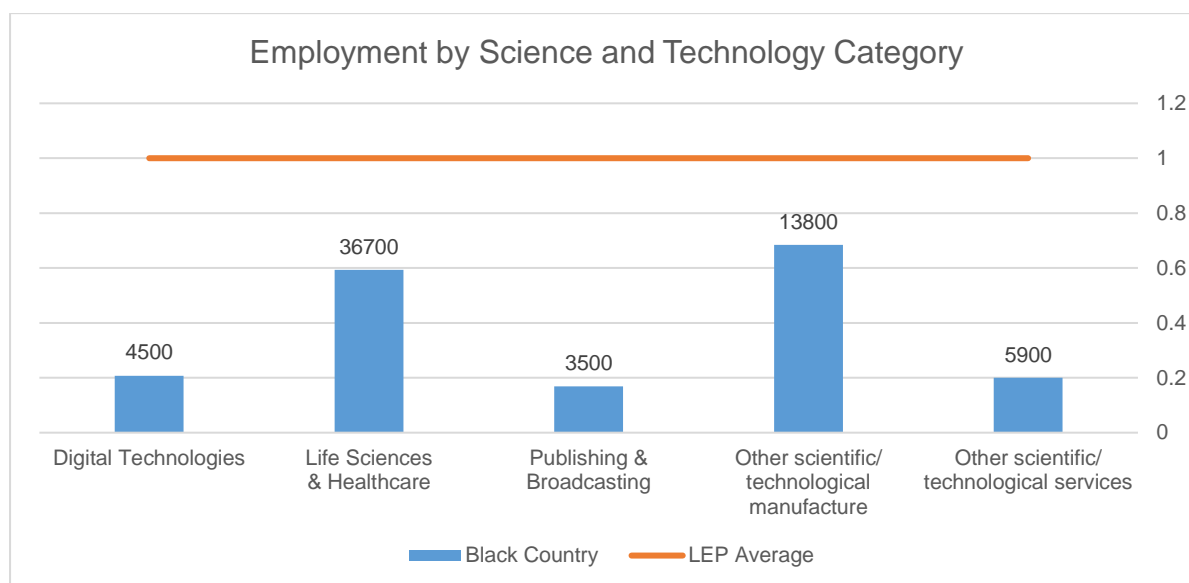


Figure 9: Employment by science and technology category (Source: [Smart Specialisation Hub](#))

The Black Country Enterprise Zone is spread over 120 hectares based at three sites; Wolverhampton North (including i54), Darlaston Enterprise Zone and DY5, Dudley's Business and Innovation Enterprise Zone. The Zone has created 4,000 new jobs in advanced manufacturing including aerospace, automotive and engineering.

## 2. Business

The BCLEP's business base currently stands at 38,335 (331 per 10,000 population compared to 442 for the UK in 2018). To reach the national average, BCLEP would need to increase its enterprise stock by 14,450. Business births per 10,000 population for the BCLEP is also lower than the national average at 40 compared to 57 in 2018 (see Table 7). In 2018, business births were exceeding business deaths showing that the BCLEP is on a positive upwards trajectory for growing its business base and narrowing the gap between the BCLEP and the UK (see Figure 10). Figure 11 shows the proportion of start-ups scaling <£500k to £1m+ in 3 years (2015-18) and survivors scaling £1-2m to £3m+ in 3 years (2014-17). On the growth of start-ups, the data shows that the BCLEP falls just below the English average at 1.7% compared to 2.0%. On the growth of existing businesses, BCLEP again falls below the average for England at 6.4% compared to 7.6%. Between 2010-13 and 2015-18, BCLEP consistently had a lower high growth firm incidence rate than the UK average (see Figure 12).

	Business stock (2018)	Business stock per 10,000 population	Start-ups per 10,000 population
UK	2939520	442	57
Black Country	38335	321	40
Dudley	10740	335	38
Sandwell	10055	307	42
Walsall	8775	310	39
Wolverhampton	8765	335	43

Table 7: Business Stock and Start-ups (Source: ONS Business Demography, 2018)

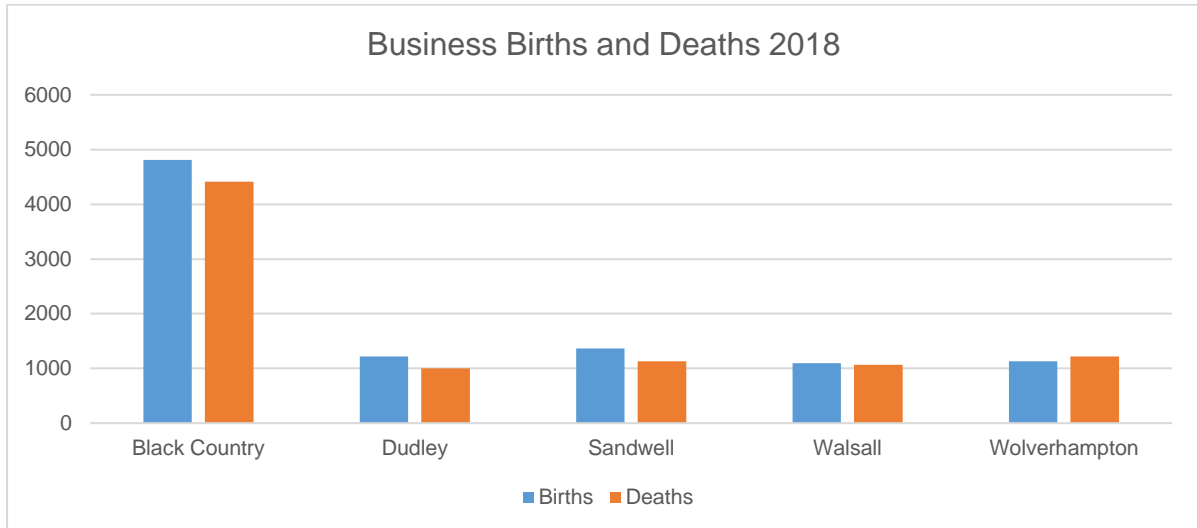


Figure 10: Business Births and Deaths (Source: ONS Business Demography, 2018)

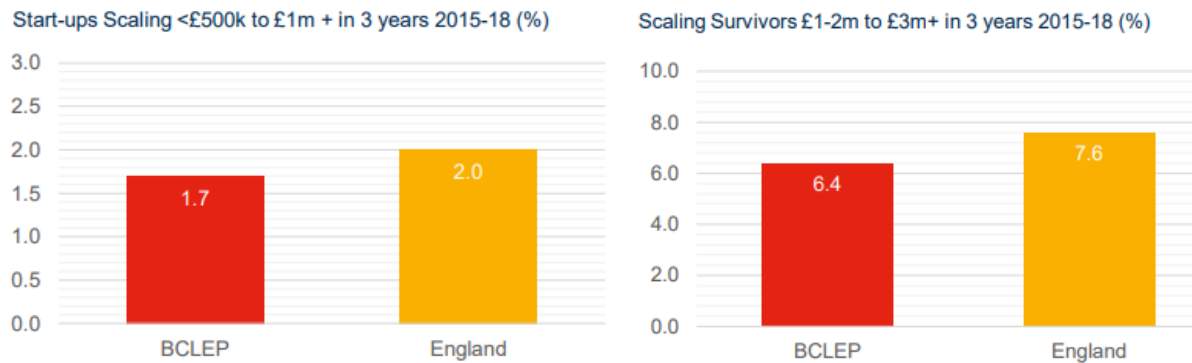


Figure 11: Growth of start-ups scaling <£500k to £1m+ in 3 years 2015-18 (Source: [Enterprise Research Centre, 2018](#))

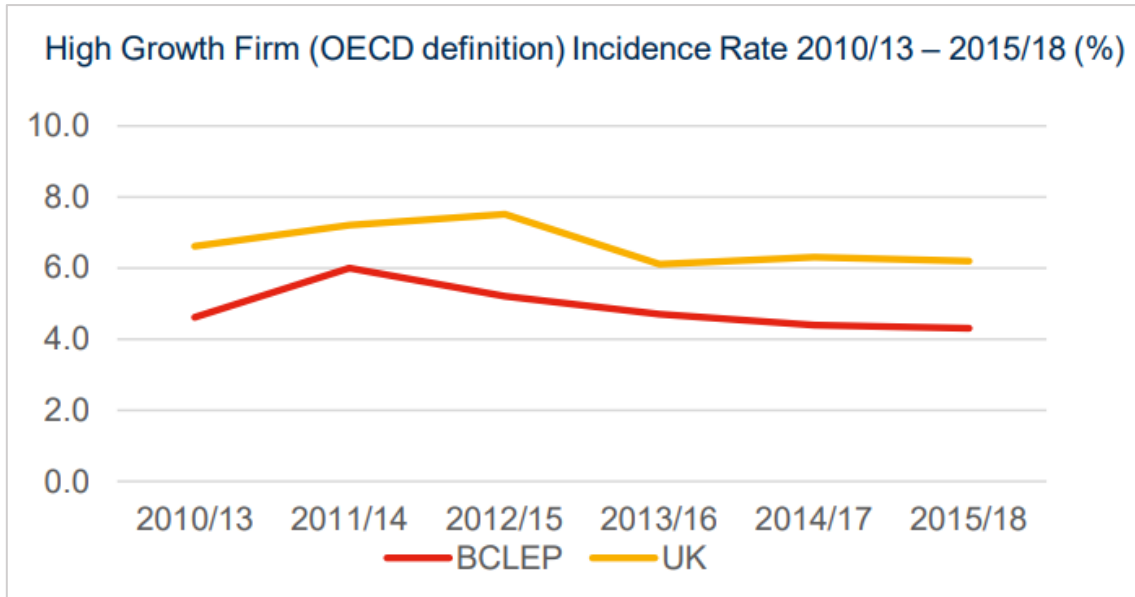


Figure 12: High growth firm incidence rate 2010/13 – 2015/18 (%) (Source: [Enterprise Research Centre, 2018](#))

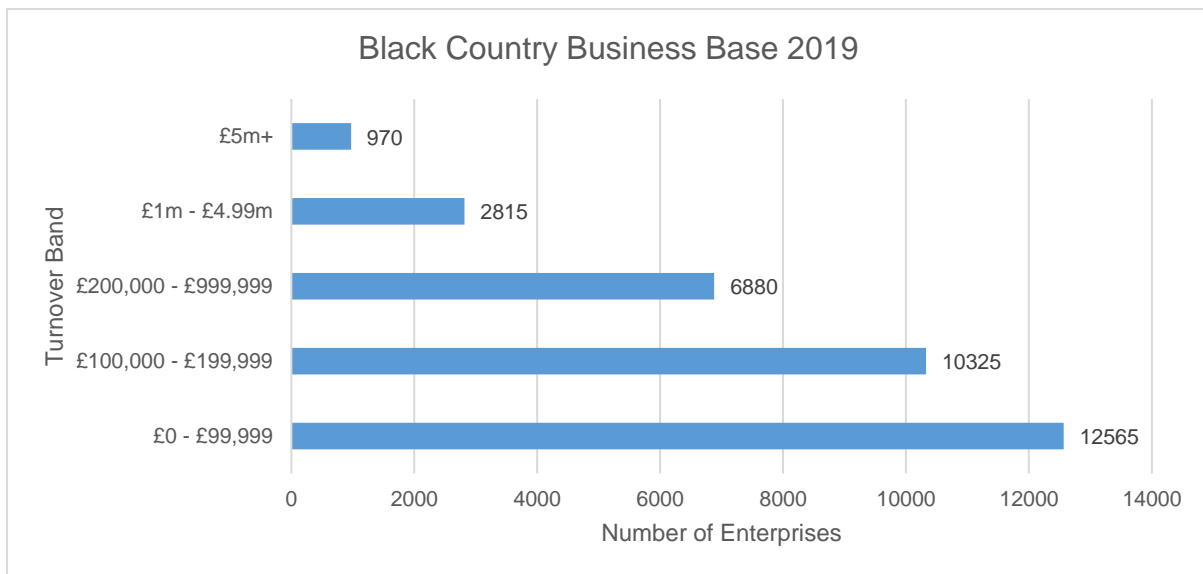


Figure 13: BCLEP Business Base 2018 (Source: ONS Business Demography 2018)

	Black Country (number)	Black Country (%)
Micro (0 to 9)	29200	87.0
Small (10 to 49)	3530	10.5
Medium (50 to 249)	670	2.0
Large (250+)	150	0.5
<b>Total</b>	<b>33555</b>	<b>-</b>

Table 8: Business Counts of Enterprises 2019 (Source: ONS)

Table 8 shows that the vast majority of BCLEP businesses enterprises (87%) are small firms with 0 to 9 employees. Only 0.5% of enterprise firms in the BCLEP employ more than 250 people.



Figure 14 shows job by broad sector for the BCLEP and Great Britain. The BCLEP has a strong business base focused on 'manufacturing' (14.4% of total employment), 'health' (14.2% of total employment) and 'retail' (10.2% of total employment). Other sectors the BCLEP scores higher than the national average on, include: 'education' (9.6%), 'transport and storage' (6.4%), 'construction' (5.3%), 'motor trades' (2.4%) and 'property' (2.2%).

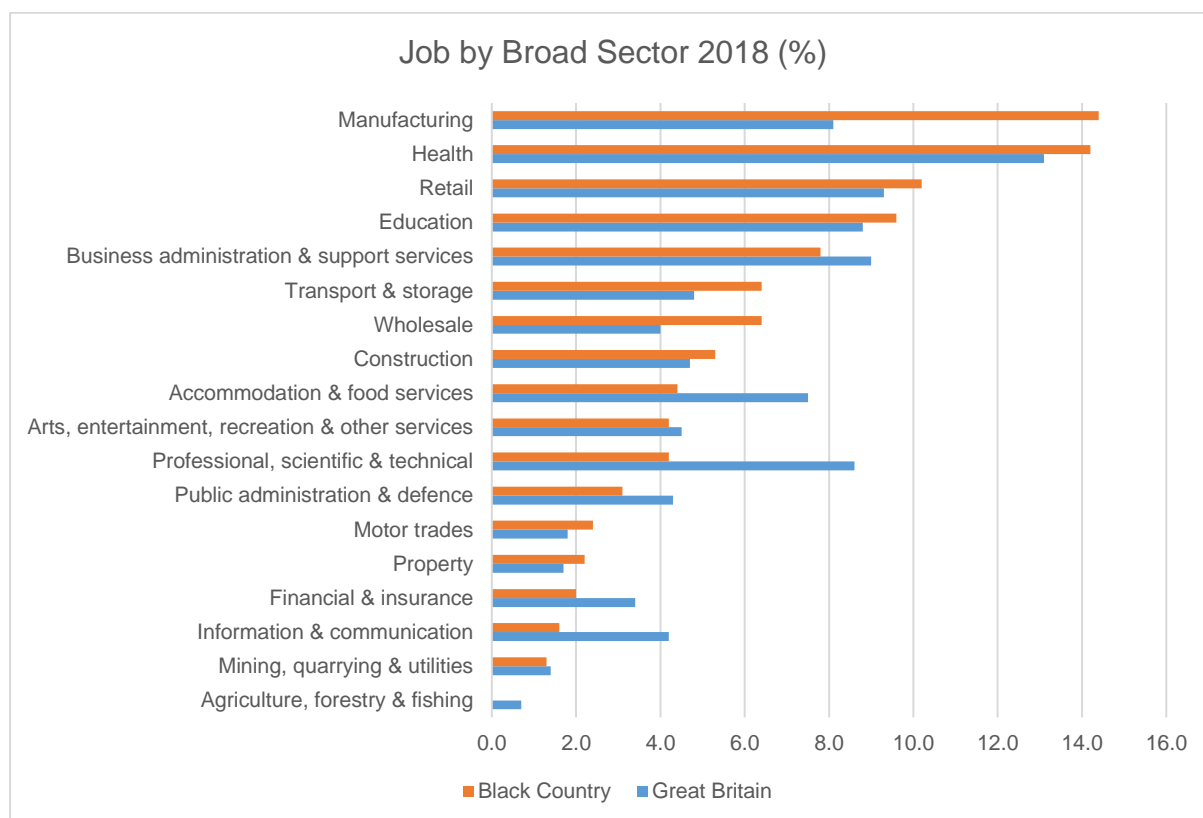


Figure 14: Jobs by broad sector (Source: BRES, 2018)

The fDi's European Cities and Regions of the Future 2018/19 ranked the Black Country LEP as the third most cost-effective LEP in the UK.

According to the Black Country Annual Economic Review 2019:

- In 2017/18, the Black Country reported a growth in the number of new jobs created by foreign owned companies, securing 1,174 new jobs, a 57% increase compared to 2016/17.
- In 2017/18, 11 successful FDI projects were delivered which were a mix of new investment and existing company expansion.
- Black Country Companies exported £3.1bn worth of goods in 2017. Germany, the USA and Ireland are the Black Country's top three customers (2015).
- Manufactured goods including transport and machinery make up 67% of goods exports.
- From 1<sup>st</sup> April 2018 to 7<sup>th</sup> January 2019 the Department of International Trade supported a total of 82 export wins worth £66m, an increase from £60.9m in 2017.

Source: [The Black Country Annual Economic Review 2019](#)

### 3. Infrastructure

Figures 15 and 16 identify BCLEP's transport priority projects with an investment total of £2.1bn. Figure 16 shows the total jobs density in relation to the priority transport projects to demonstrate how transport infrastructure will improve the accessibility of unconnected Black Country residents, including a £343m extension of the metro line to improve connectivity through to Dudley and the Enterprise Zones.

Map ID	Project Type	Project	Project Cost
1	Motorways	M6 Junction 10	£65m
2		M5 Improvements (Junctions 1 and 2 and new Smart Motorway Section)	£150m
3		M54 – M6 (Toll) Link Road	£205m
		Total Cost	£420m
4	Rail	Walsall – Willenhall – Wolverhampton Rail Link	£48m
5		Midlands Rail Hub	£500m
6		Wolverhampton – Shrewsbury Line Improvements	£100m
		Total Cost	£648m
7	Metro	Wednesbury – Brierley Hill, with a new Dudley Interchange	£343m
8		Wolverhampton – New Cross Hospital	£100m
9		Walsall – Stourbridge corridor tram-train extensions	£300m
		Total Cost	£743m
10	Key Road Corridors	Schemes to improve general reliability, public transport, cycling and walking A4123 Corridor Upgrade	£50m
11		A449 Stafford Road Corridor Upgrade	£57m
12		A34 Walsall Road Corridor Upgrade	£33m
		Total Cost	£140m
13	Interchanges	Wolverhampton Interchange	£120m
14		Dudley Port Rail / Metro Interchange	£15m
15		Walsall Interchange	£32m
		Total Cost	£167m
Total Cost: All Projects			£2.1bn

Figure 15: Key transport projects and costs (Source: [The Black Country Annual Economic Review 2019](#))

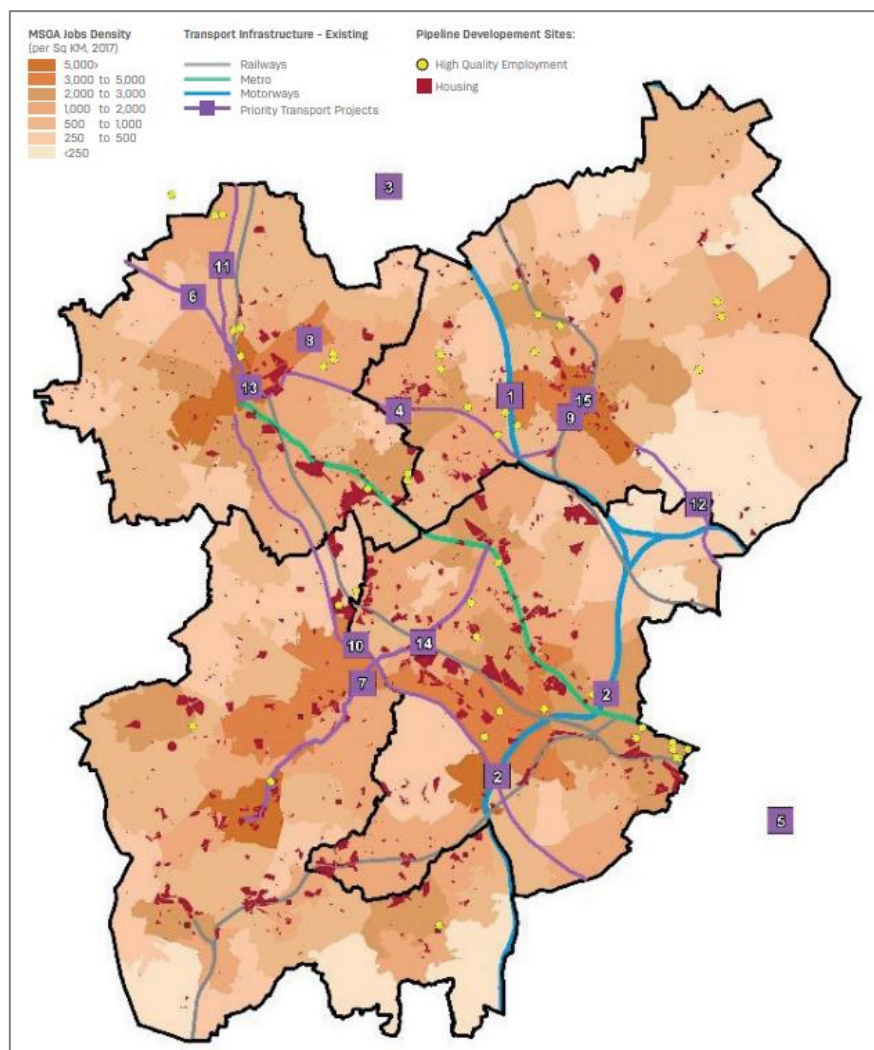


Figure 16: Key transport projects map (Source: [The Black Country Annual Economic Review 2019](#))

Figure 17 features a selection of infrastructure developments that are either recently completed or up and coming within the Black Country.

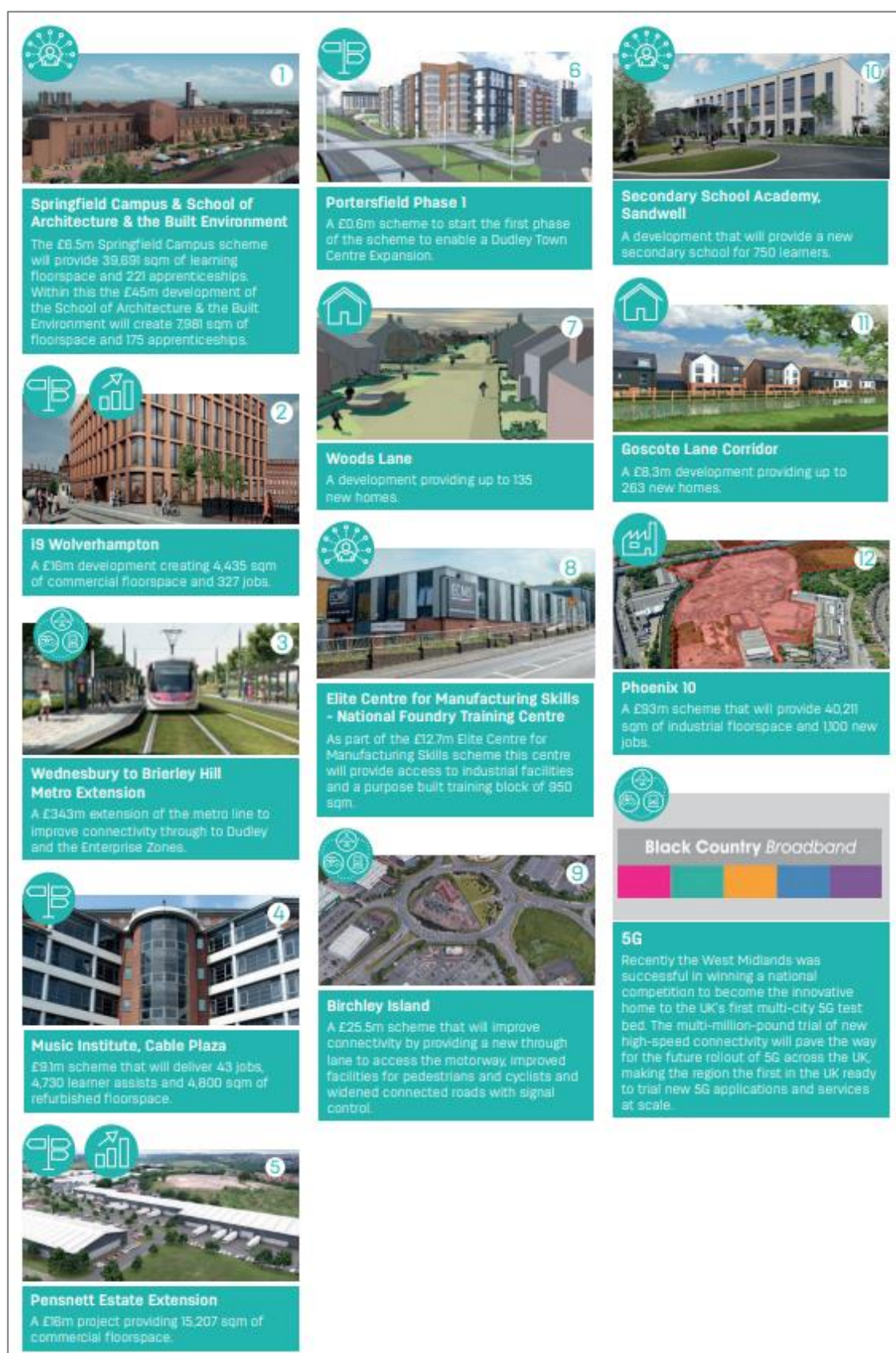


Figure 17: BCLEP up and coming infrastructure developments (Source: [The Black Country Annual Economic Review 2019](#))

Housing stock in the BCLEP has been rising in recent years, as can be seen in Figure 18 below. However, it is rising at a slower pace than the average for England. Between 2017 and 2018, the number of dwellings in the BCLEP rose by 0.6% compared to 0.9% for England.

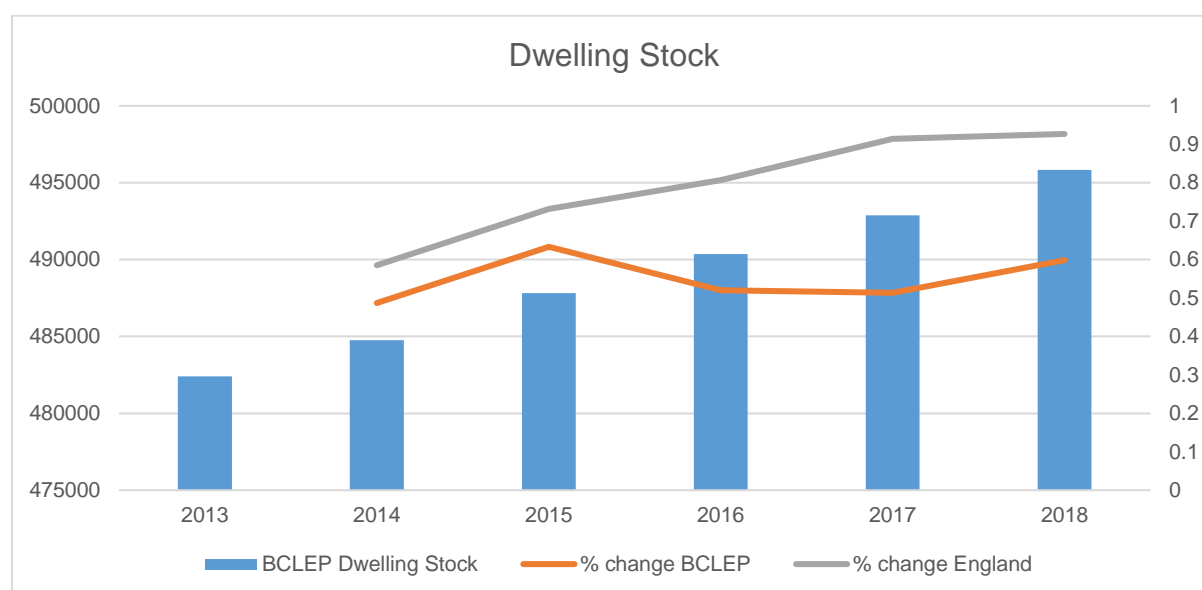


Figure 18: Dwelling Stock (Source: Ministry of Housing, Communities and Local Government, 2018)

The pace of house building is not keeping up with demand. In addition, between 2015 and 2018 housing costs in the BCLEP were increasing faster than local salaries (see Figure 19). This did change, however, between 2018 and 2019 when earnings rose just above the rate for house prices.

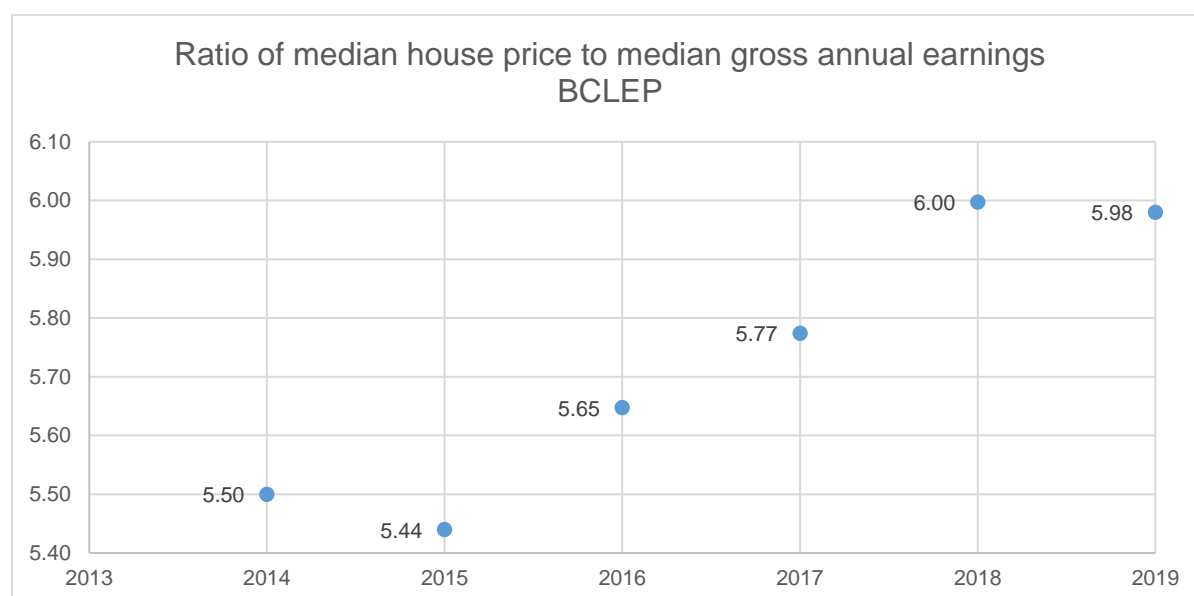


Figure 19: Ratio of median house price to median gross annual earnings in the BCLEP



The BCLEP benefits from good broadband connectivity, with 60.8% of total connections receiving superfast broadband (> 30 Mbps) compared to 55.3% for the UK. The BCLEP has the highest percentage of total connections receiving superfast broadband of the 3 LEPs covering the WMCA.

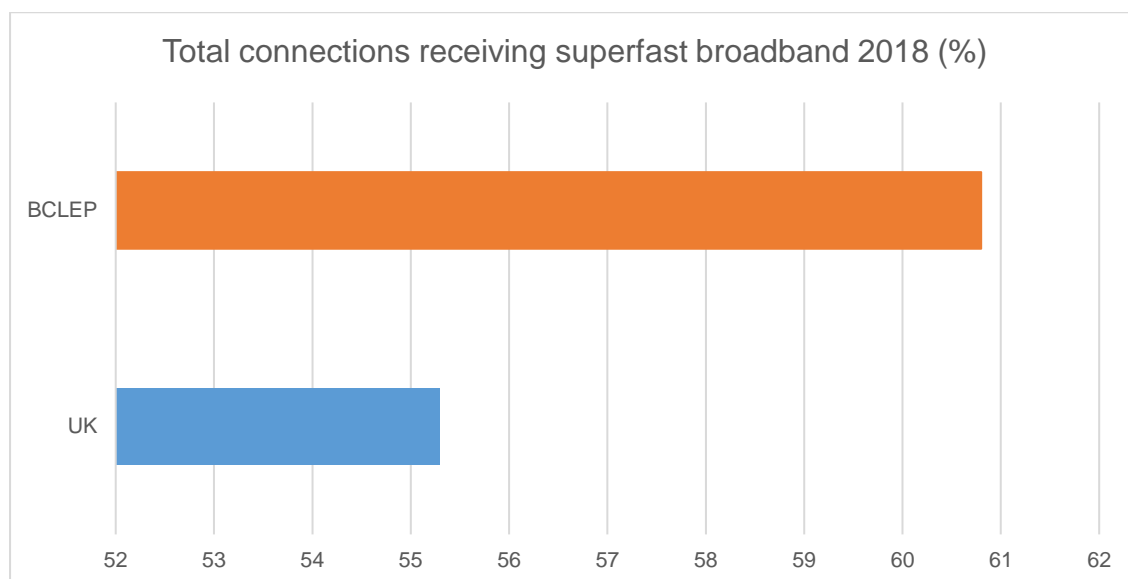


Figure 21: Total connections receiving superfast broadband (Source: OFCOM, Connected Nations 2018)

In September 2018, the WMCA successfully won a competition put out by the Department for Digital, Culture, Media and Sports to accelerate the roll out of 5G and be the lead partner of the 5G Testbeds and Trails Programmes Urban Connected Communities Project. The Project began in 2018 and will run until March 2022.

#### 4. People

	BCLEP	BCLEP (%)	Great Britain (%)
All people aged 16-64	732900	61.4	62.7
Economically Active	554500	74.3	78.9
In Employment	524900	70.2	75.7
Employees	459300	61.7	64.7
Self Employed	64800	8.5	10.8
Unemployed	29600	5.3	3.9

Table 9: Working age population, employment and unemployment 2018 (Source: ONS Annual Population Survey)

	BCLEP (%)	Great Britain (%)
NVQ4+	33.1	39.3
NVQ3+	51.9	57.8
NVQ2+	70.4	74.9
NVQ1+	81.4	85.4
Other Qualifications	8.3	6.8
No Qualifications	10.3	7.8

Table 10: Qualifications 2018 (Source: ONS Annual Population Survey)

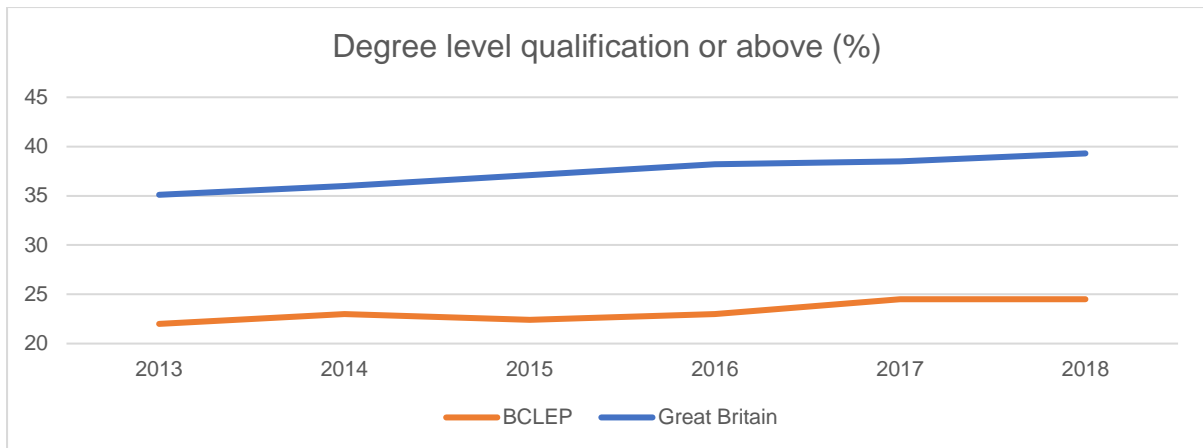


Figure 22: Population aged 16-64 with NVQ4+ qualifications (Source: ONS)

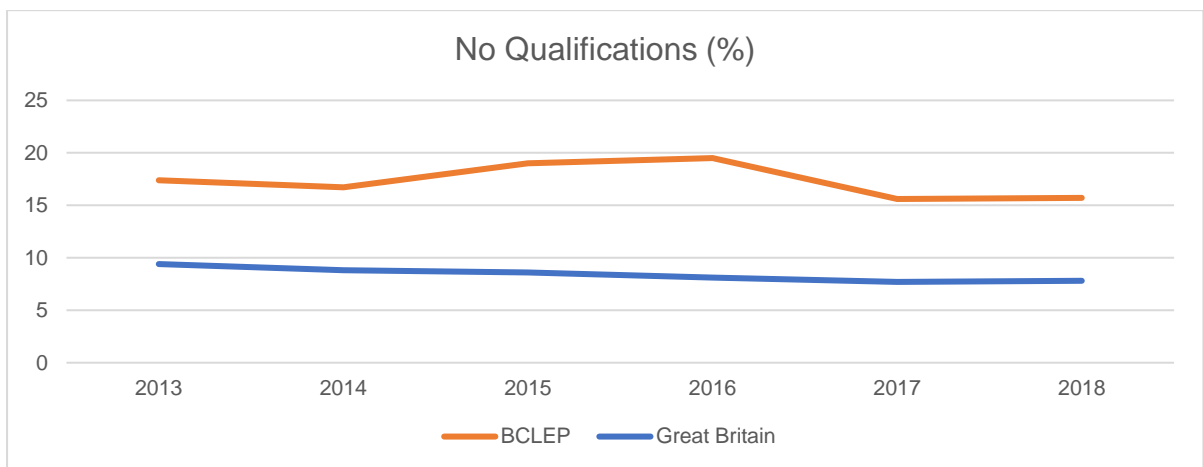


Figure 23: Population aged 16-64 with no qualifications (Source: ONS)

	Stay for study and employment	Leave for study, return for employment	Leave for study, do not return	Stay for study, leave for employment
Black Country	19.8%	27.0%	43.9%	9.2%
National Average	29.3%	30.4%	34.3%	6.0%

Table 11: Graduate retention (Source: HESA, 2018)

## 5. Place

As shown in Table 12, in 2017 the BCLEP had 400,000 day visitors and 800,000 overnight visitors, and visitor spending in the region stood at £37m.

	2016	2017
Visitor Day Trips	400,000	400,000
Visitor Night Trips	800,000	800,000
Visitor Spend	£39m	£37m

Table 12: Day visitors, overnight visitors and visitor spend

The BCLEP is an area with high levels of deprivation. According to the 2019 Index of Multiple Deprivation (IMD) for England, 45.6% of the BCLEP falls within the 20% more deprived areas nationally. In contrast, only 8.6% of the BCLEP falls within the 20% least deprived areas (see Table 13). The distribution of deprivation in the BCLEP is shown in Figure 24.

2019 IMD		
	No.	%
10% most deprived	136 (out of 712 LSOAs)	19.1%
20% most deprived	325 (out of 712 LSOAs)	45.6%
10% least deprived	26 (out of 712 LSOAs)	3.7%
20% least deprived	61 (out of 712 LSOAs)	8.6%

Table 13: 10% and 20% most and least deprived areas in the BCLEP (Source: IMD 2019)

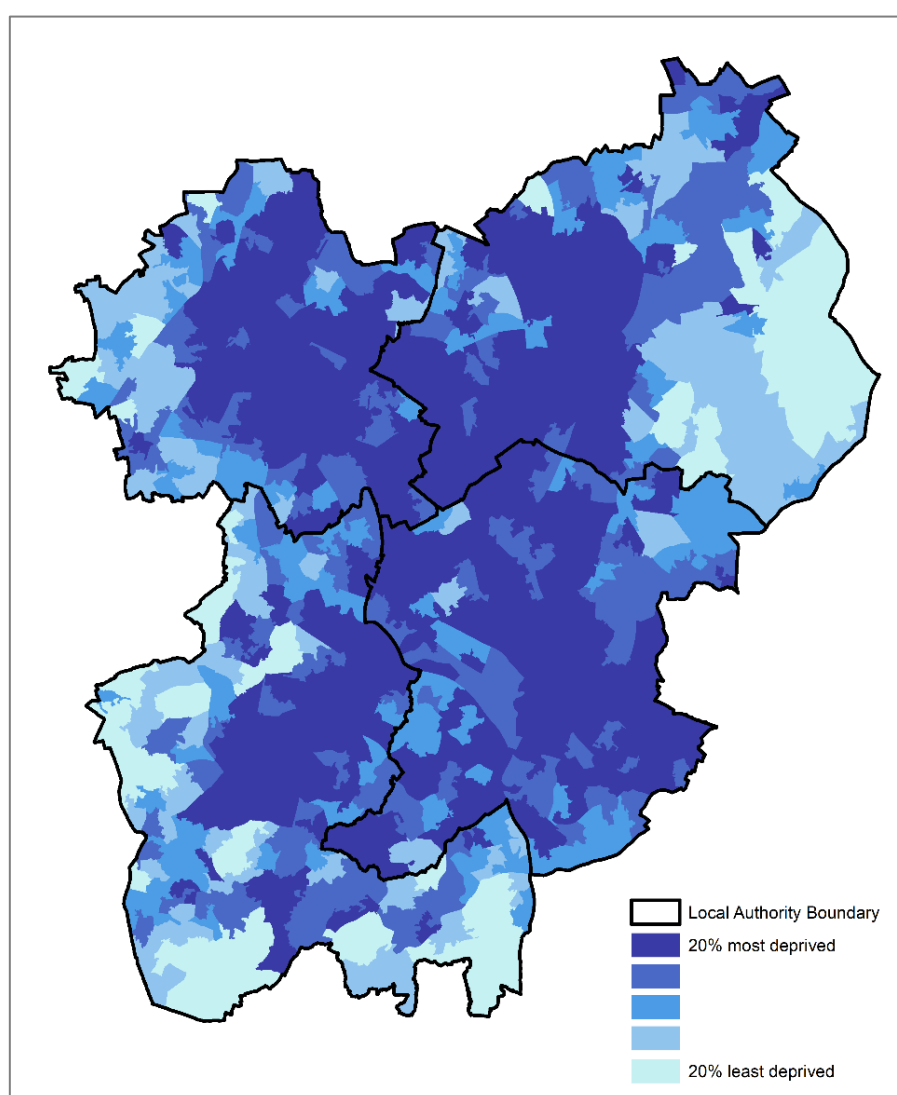


Figure 24: Deprivation in the BCLEP (Source: IMD 2019)



## 6. Environment

Since the Localism Act of 2011, air quality competences have been the responsibility of local authorities.

	Deaths per year attributable to NO2 pollution: 2011	Deaths per year attributable to NO2 pollution: 2018	Deaths per year attributable to PM2.5 particulate pollution: 2011	Deaths per year attributable to PM2.5 particulate pollution: 2018
Black Country	404	164	614	554
Dudley	72	21	158	142
Sandwell	147	71	178	161
Walsall	107	43	147	133
Wolverhampton	78	29	131	118

Table 14: Deaths attributable to air pollution (Source: [Birmingham Clean Air Zone Report 2018](#))

In 2017, the Black Country produced a total of 4,766 Kt CO<sub>2</sub> emissions. This equates to 4.0 tonnes per capita, below the England average of 5.1 (see Table 15). Compared to 2016, the Black Country has reduced emissions by 1.8% (-88 Kt CO<sub>2</sub>). England's overall emissions have decreased by 3.6%. In the Black Country, tonnes per capita has reduced by 2.4% since 2016 (see Table 16).

	2016 Total	2016 per capita emissions	2017 Total	2017 per capita emissions
England	295686	5.4	284921	5.1
<b>Black Country</b>	<b>4854</b>	<b>4.1</b>	<b>4766</b>	<b>4.0</b>
Dudley	1221	3.8	1188	3.7
Sandwell	1482	4.6	1486	4.6
Walsall	1136	4.1	1119	4.0
Wolverhampton	1015	3.9	973	3.7

Table 15: 2016-17 CO<sub>2</sub> Emissions (Source: Department for Business, Energy & Industrial Strategy)

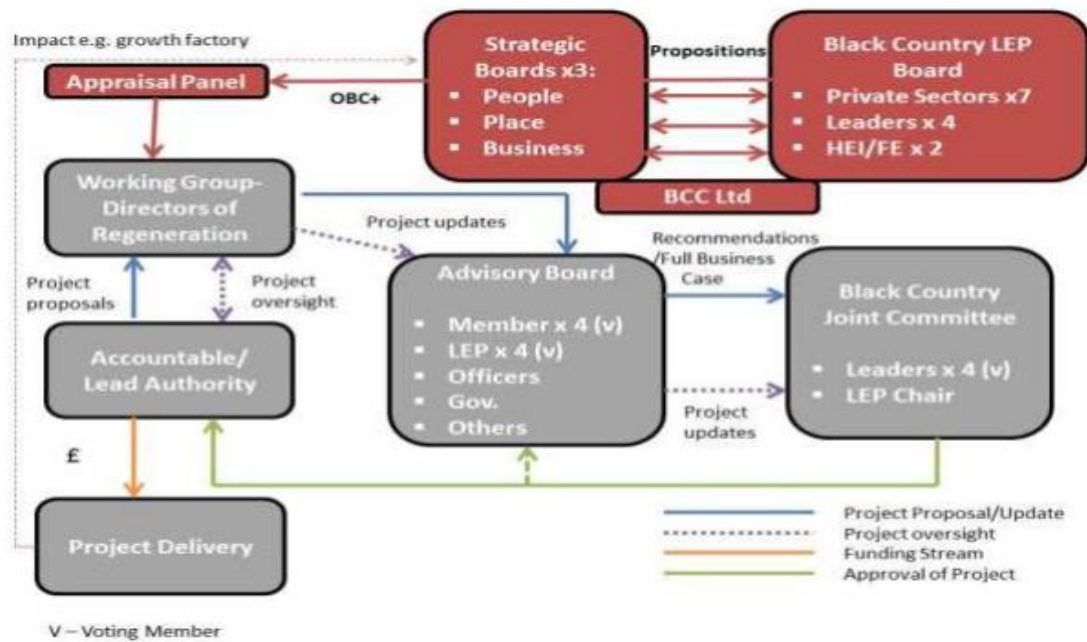
	2016-17 total change	2016-17 change per capita	2016-17 total change (%)	2016-17 change per capita (%)
England	-10765	-0.2	-3.6%	-4.2%
<b>Black Country</b>	<b>-88</b>	<b>-0.1</b>	<b>-1.8%</b>	<b>-2.4%</b>
Dudley	-32	-0.1	-2.6%	-3.2%
Sandwell	4	-0.0	0.3%	-0.6%
Walsall	-18	-0.1	-1.5%	-2.4%
Wolverhampton	-43	-0.2	-4.2%	-4.9%

Table 16: 2016-17 CO<sub>2</sub> Emissions, Annual Change (Source: Department for Business, Energy & Industrial Strategy)



Figure 25: BCLEP Environment Projects (Source: [The Black Country Annual Economic Review 2019](#))

## Appendix A - Governance Structure



Source: [BCLEP Assurance Framework](#)

## Appendix B – Strategic Economic Plan 2014

	<b>BCLEP</b>
Overall vision	To grow global supply chain with the world class skills it demands, to maximise the benefits of our location, to exploit our industrial and geological heritage and to provide high quality housing to meet the needs of a balanced growing population.
Headline Targets (short-medium term)	<p>By 2021:</p> <ul style="list-style-type: none"> <li>• Increase the number of residents qualified to degree level by 32,000</li> <li>• Increase employer investment in training from 62% to 66%</li> <li>• Increase % of pupils achieving 5+ A*-C at GCSE level including English and Maths to 59.2%</li> <li>• Reduce number of working age population with no qualifications to 92,656</li> <li>• An additional 411ha of high quality employment land</li> <li>• An additional 22,000 homes</li> <li>• Increase the number of new business starts per annum to 3,981</li> </ul>
Strategy	
1. Growing business base	<p><b>Aspiration</b></p> <p>To enable and expand the availability of high quality employment sites and premises and deliver a portfolio of strategic mixed use development opportunities. To foster a more entrepreneurial culture.</p> <p><b>Proposal</b></p> <p>To implement targeted programmes to ensure a continuous supply of competitive sites and buildings for business growth and enhance the quality of strategically important business locations. To implement a programme to develop a more entrepreneurial and dynamic economy by growth existing businesses and providing enterprise support for new business creation.</p>
2. Building on sector strengths	<p><b>Aspiration</b></p> <p>To capture economic growth arising from a number of growing sectors. To deliver additional jobs in high value manufacturing, focused on Aerospace, Automotive and Building Technologies Sectors. To help companies in target sectors to invest in plant, machinery and property. To maximise visibility of companies to the wider global market.</p> <p><b>Proposal</b></p> <p>To identify and proactively target key markets which present the best opportunities for business and investment in Aerospace, Automotive and Construction Technologies. Enable SME's to gain a "first mover advantage" in the UK smart grid market. To grow the capacity of the science park to enable business creation and growth in high value manufacturing. To work with companies to determine smart specialisations, potential new developments in key markets and make sure they are fit to win work leading to world class accreditations.</p> <p>Five transformational sectors identified: advanced manufacturing, building technologies, transport technologies, business services and environmental technologies. Five enabling sector identified: retails, visitor economy, sports, health and the public sector (inc. education and skills).</p>
3. Stimulating innovation	<p><b>Aspiration</b></p> <p>To strengthen innovation capacity and develop the capacity of businesses to innovate and respond to new opportunities.</p> <p><b>Proposal</b></p> <p>To build and exploit the local supply chain through innovation support. To exploit 16 growth corridors by supporting the functioning and development of local growth clusters in growth corridors, in particular to exploit innovation and supply chain opportunities. Proposal for the creation of a Centre of Excellence for Light Rail Innovation to; showcase emerging innovation utilising opportunities for a demonstrator track, create opportunities for skills and employment, and develop the capacity in the UK to build rather than import light rail vehicles.</p>
4. Improving skills	<p><b>Aspiration</b></p> <p>To ensure the Black Country has a labour market with the right levels of skills and qualifications to meet the needs of businesses from the area's priority growth sectors. To address skills gaps in transformational and enabling sectors. To attract and retain a greater proportion of higher income households with the skills to drive the knowledge economy.</p> <p><b>Proposal</b></p>

	<p>Working with businesses to increase business investment in skills and training and raise skills of existing workforce. To increase capacity to deliver high quality training to fill skills gaps faced by businesses in our target sectors. To deliver specialist equipment for use in new training provision. To up-skill existing employees through employer led specifications of bite-sized practical training (1-2 day courses). A wage incentive for engineering companies taking on apprentices for the first time and progressing them through to advanced level apprenticeships. Promotion of careers in high value manufacturing / engineering to primary and secondary schools with the aim to change the perception of engineering as low pay / low skill career choice and inform young people of career roles. Targeting master craftsman to be trained as expert trainers in the industry to pass on their skills before retirement.</p>
5. Improving connectivity	<p><b>Aspiration</b></p> <p>To connect goods, services and employees to work and to international markets. To maximise the benefit of its location at the centre of the transport network, ensuring modern, convenient and reliable connectivity. To provide quick, efficient and reliable movements of products and people to the strategic road and rail network. To provide the key infrastructure required to unlock housing and employment sites.</p> <p><b>Proposal</b></p> <p>Making the most efficient use of local transport networks by targeting short trips to reduce localised congestion. Maximise benefits of HS2. An initial phase of four transport investments to deliver enhanced, multimodal connectivity to HS2, key sites and the motorway network. To provide capacity and improve reliability of journey times to key centres and sites for growth. To support an integrated network of Corridors and Strategic Centres. To maximise the economic benefits from superfast broadband.</p>
6. Housing/other assets	<p><b>Aspiration</b></p> <p>To significantly improve the quality of city centre cultural and events offer. To create a high quality environment to make it an attractive place to invest, live, work and visit. To become genuinely inclusive, with citizens who have a sense of belonging and who contribute to the wellbeing of the area. To provide high-quality housing which can meet the needs of a balanced population. To accelerate the housing market.</p> <p><b>Proposal</b></p> <p>Create a network of four thriving centres, each offering a distinct mix of shopping, leisure, cultural and commercial facilities.</p> <p>To encourage residential developments in strategic centres. To create an urban park landscape including greenspace, community and heritage assets. To create a greater variety of quality housing environments and broaden housing offer by including a variety of housing types at a range of price points to meet the needs of a mixed market. To encourage the inclusion of alternative tenures such as Mutual Home Ownership and Market Rent. To create a joint land committee to help bring forward sites.</p>

## Appendix C – BCLEP Direct Funds, 2015-2021

	2015/16	2016/17	2017/18	2018/19	2019/2020	2020/2021	Total
Local Growth Fund	£30.0	£46.3	£31.4	£19.5	£33.0	£51.0	£211.1
Land & Property Inv. Fund				£0.0	£53.0		£53.0
Growing Places Funding	£13.8			£0.0	£5.4		£19.2
Enterprise zone		£0.2	£2.3	£13.6	£20.0	£18.0	£54.1
LEP Funding	£0.5	£0.5	£0.5	£0.5	£0.5	£0.7	£3.2
Growth Hub				£0.3	£0.3	£0.3	£0.9
Sports	£1.2	£1.2	£0.6	£0.8	£0.5	£0.7	£5.1
Skills	£0.4	£0.2	£0.6	£0.3	£0.5	£0.3	£2.3
City Deal		£2.7	£2.7	£2.7			£8.0
Broadband		£1.0	£1.0	£1.0			£3.0
Growing Priority Sectors		£2.7	£2.7	£2.7			£8.0
Total	£45.9	£54.8	£41.8	£41.3	£113.3	£71.1	£368.1