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# The West Midlands Combined Authority

Annual Economic Review

**2017**



**WEST MIDLANDS**  
COMBINED AUTHORITY

This report is produced by the Economic Intelligence Unit of Black Country Consortium Ltd

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**Black Country Consortium**



*Economic Intelligence Unit*



# Introduction



**Andy Street CBE**  
Mayor of West Midlands



**Bob Sleigh OBE**  
Deputy Mayor of West Midlands



**Martin Reeves**  
WMCA Chief Executive

The West Midlands Combined Authority (WMCA) Annual Review is produced annually by the Black Country Consortium’s Economic Intelligence Unit (EIU) to provide an overview of the WMCA’s economic performance during the year.

The report measures success as set out in our Performance Management Framework (PMF) and enables us to monitor real progress towards delivery of the WMCA Strategic Economic Plan (SEP).

2016 has seen many significant developments including the formation of the West Midlands Combined Authority (WMCA) and the production of a Strategic Economic Plan for the WMCA.

The Black Country Economic Intelligence Unit played a fundamental role in the development of the WMCA SEP and plan to utilise its diverse and experienced skill set to provide a flexible intelligence resource to the WMCA. The EIU have developed a Performance Management Framework (PMF) for the WMCA and will continue to measure the success of our collective activity as set out in the WMCA SEP.

# Section 1:

## How we measure success

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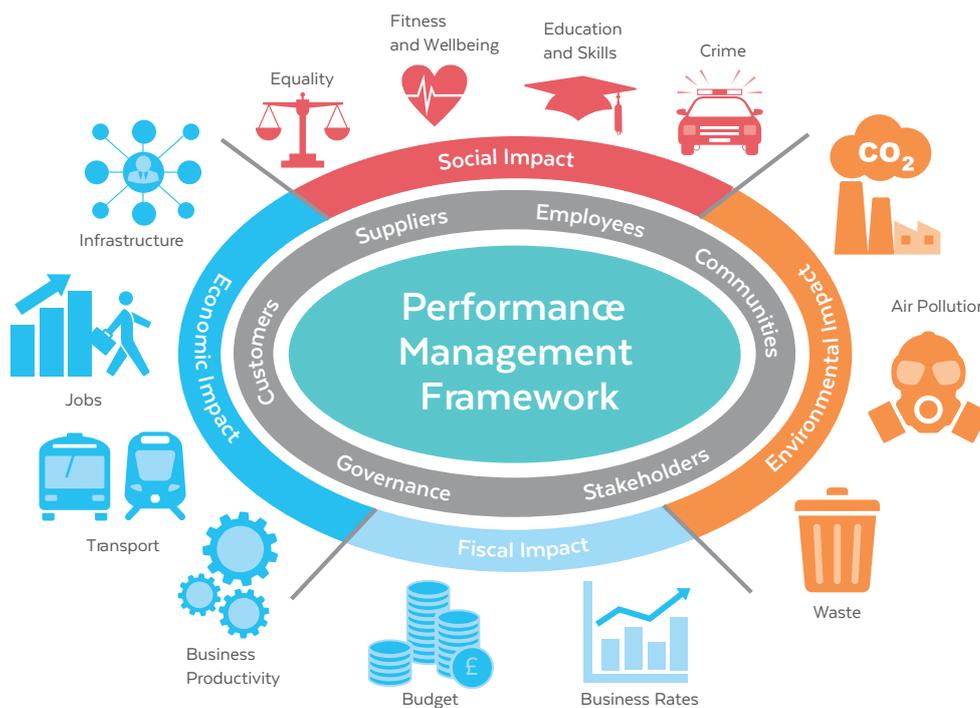
# How we measure success

## The WMCA Performance Management Framework

The WMCA Performance Management Framework (PMF) provides a clear framework against which success can be measured. The Vision for the area has a number of smart objectives with clear targets. The PMF is composed of a selection of strategic headline indicators, which measure the impact of the various programme areas of the WMCA Strategic Economic Plan (SEP). These indicators span a wide range of themes including productivity, employment and skills, infrastructure, competitiveness, sustainability and public service reform and measure the economic, social, fiscal and environmental impact. The PMF is maintained and updated by the Economic Intelligence Unit (EIU) of Black Country Consortium Ltd who provide in depth cross-thematic spatial analysis on behalf of the WMCA.

Understanding the economic impact of current and planned activity in the context of the WMCA SEP is fundamental to the work of the EIU. They continue to be at the forefront of new techniques including leading on the operation of the WMCA Dynamic Economic Impact Model which provides a clear mechanism to measure the economic impact of programmes in a spatial context.

The EIU will annually monitor WMCA’s progress in relation to the targets in the PMF so that we can be clear on the impact of our delivery plan in achieving our ambitions. The indicators in the PMF will also be the basis upon which we appraise and prioritise our programme of interventions to deliver the WMCA SEP. This carefully targeted set of interventions will ensure delivery of the greatest economic benefits to the area and allow us to create opportunities across the WMCA.



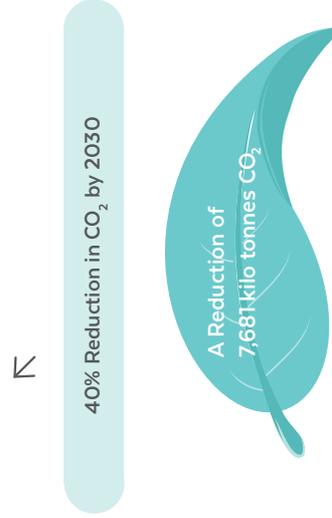
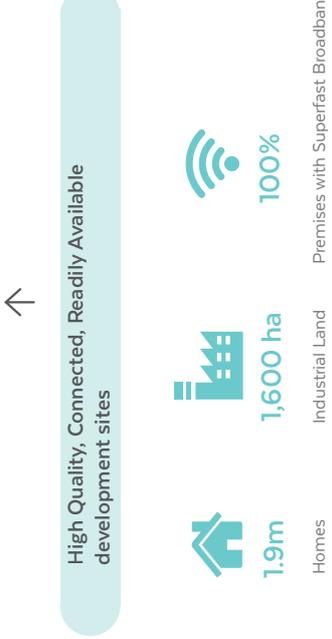
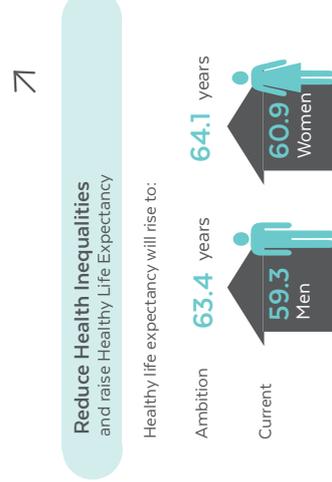
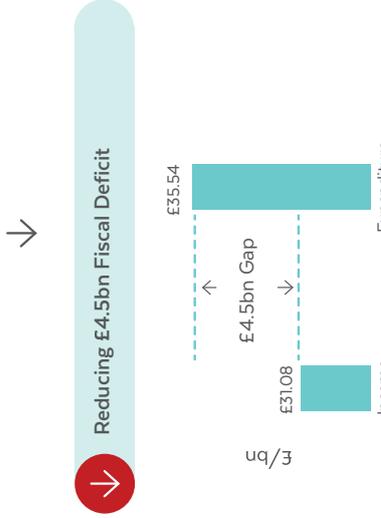
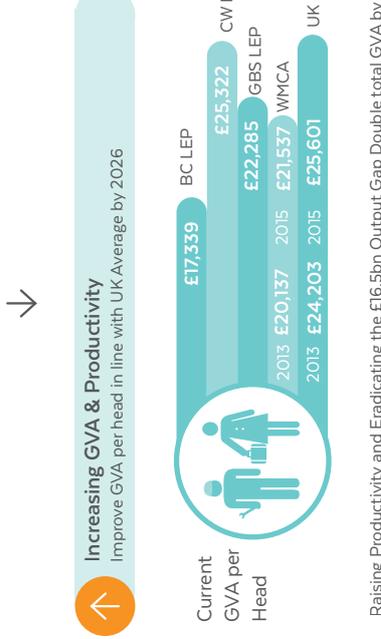
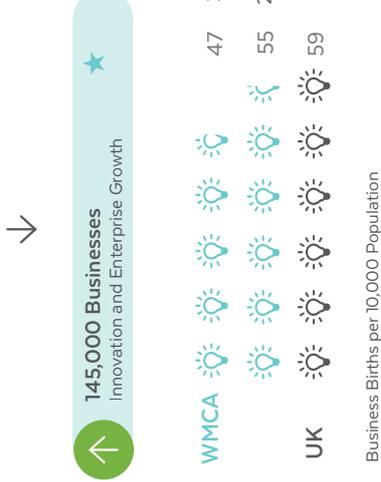
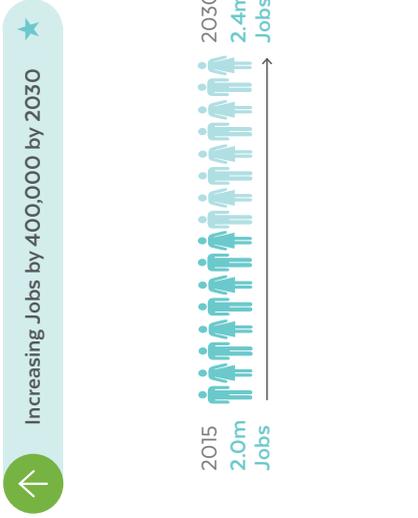
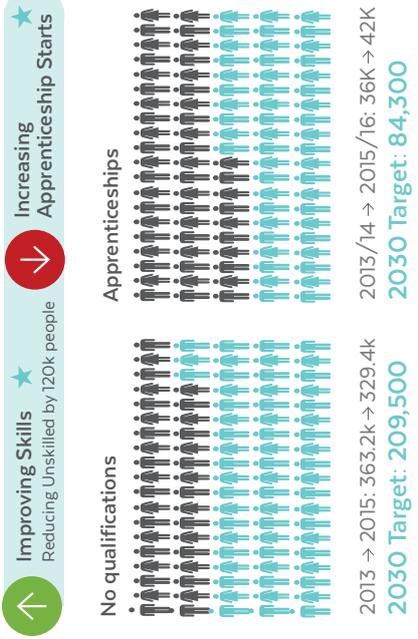
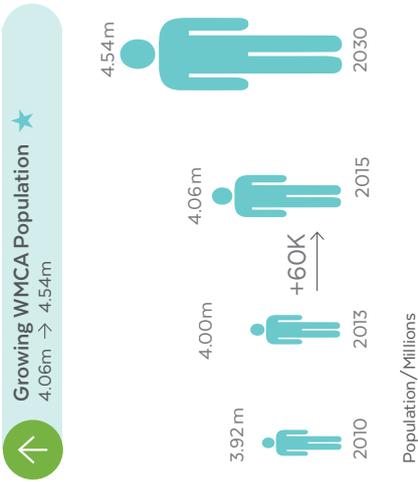
## Section 2: **West Midlands successes 2016**

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Theme	Direction of Travel	Scale of the Challenge	WMCA Actions to Address
Economic Impact	<p><b>+£7bn</b> Since 2013</p>  <p>GVA continues to rise - currently £87.5bn +£7bn since 2013</p>	<p>WMCA GVA per head <b>£4,000</b> lower than UK</p> <p>WMCA GVA per head still £4,000 lower than UK resulting in a £16.5bn GVA output gap</p>	<p>£8bn investment package from first devolution deal</p> <p>HS2 and the Midlands Growth Strategy - a catalyst for economic growth</p>
	<p><b>22,430</b> businesses births</p> <p>WMCA has a growing business base with 145,410 businesses and 22,430 business births (nearly double UK growth rate)</p>	<p><b>1,468</b> businesses births</p> <p>To be in line with UK the WMCA needs to create an additional 1,468 business births per annum to reach 59 births per 10,000 population.</p>	<p>Maximising opportunities for inward investment by improving connectivity to HS2 and UK Central and attract foreign and direct investment via the WMCA new Growth Company</p>
	<p><b>2m</b> jobs</p> <p>WMCA is home to 2m jobs, an increase of 95,000 since 2013.</p>	<p><b>400k</b> jobs</p> <p>An additional 400,000 jobs to achieve our WMCA SEP Ambitions</p>	<p>Enterprise Zones</p>
	<p><b>£27,151</b> current wage</p> <p>Wages are increasing at a faster rate than UK</p>	<p><b>£1,062</b> more per head</p> <p>To reach UK average wage - £28,213</p>	<p>Public Service Reform</p>
	<p><b>12,000</b> new homes built in 2015</p> <p>Over 12,000 new homes were built last year - currently 1.7m houses in the WMCA</p>	<p><b>1.9m</b> homes by 2030</p> <p>Home to over 1.9m homes by 2030</p>	<p>Land Commission and Garden City Principles</p>
Social Impact	<p><b>13% vs 8%</b></p> <p>Number of people with no qualifications has declined at a faster rate compared to England</p>	<p>Higher proportion of people with no qualifications than across England - 13% vs 8%</p>	<p>Productivity and Skills Commission Launched</p>
	<p><b>11.4%</b></p> <p>The number of NEETs has declined more than threefold compared to England<sup>2</sup></p>	<p>11.4% more youth claimants (14,805) compared to last year increase of 1.6% across England. Need to reduce youth claimants by 5,000 by 2030 to reach England average, similar trend for overall claimant count.</p>	<p>Employment Support Pilot</p>
	<p><b>24.8%</b></p> <p>24.8% of adults are physically inactive across the WMCA</p>	<p><b>90,524</b></p> <p>Required 90,524 additional adults to become active to reach national average</p>	<p>West Midlands on the Move Strategic Framework 2017-30</p>
Fiscal Impact	<p><b>4.1 years</b></p> <p>Healthy Life Expectancy has improved for females greater than the national average whilst for males it has declined</p>	<p>Male healthy life expectancy 4.1 years lower than national average and 3.2 for females</p>	<p>Mental Health Commission -&gt; Thrive WM Action plan in place</p>
	<p><b>£4.5bn</b> gap</p> <p>Income receipts to WMCA is on the rise</p>	<p>Gap between income and expenditure has increased from £3.9bn to £4.5bn</p>	<p>Public Service Reform</p>
Environmental Impact	<p><b>7,681</b> ktCO<sub>2</sub></p> <p>CO<sub>2</sub> emissions reduced on last year by 167kt CO<sub>2</sub> (0.8%)</p>	<p>CO<sub>2</sub> emissions need to reduce by 36% by 2030</p>	<p>Support development of low carbon and zero carbon homes</p>

These colours are reflective of the theme areas in the report and don't indicate the direction of travel which is set out in the full PMF table from page 46.

# WMCA Performance Management Framework



**Key**

Positive direction of travel compared to UK average

Positive direction but below the UK average

Negative direction of travel

On track to achieve 2030 target

## Section 3: **Economic growth**

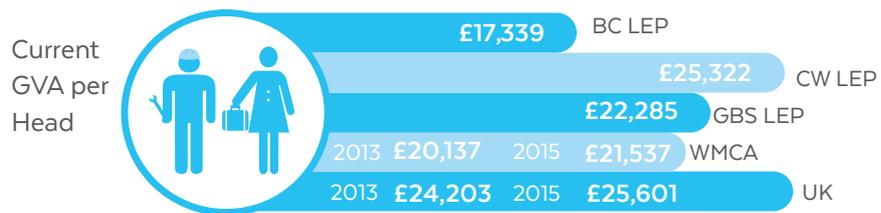
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# Economic Growth

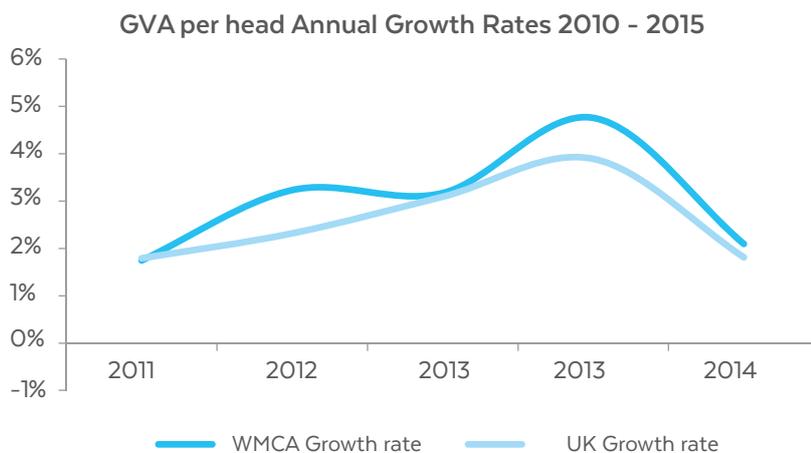
## OUTCOME – Improved GVA for the region in line with the UK average

### Productivity

- The WMCA total Gross Value Added (GVA) in 2015 was **£87.5bn<sup>2</sup>** contributing **5%** to the total UK GVA.<sup>3</sup>
- WMCA’s total GVA has increased by **8.6%** since 2013 exceeding the UK’s growth rate by **1.2%**.
- GVA per head in the WMCA is currently **£21,537** and has grown by **7%** between 2013 and 2015 equating to an additional **£1,400 GVA** per head.
- Across the UK, GVA per head has increased by **5.8%** since 2013 and is currently **£25,601<sup>4</sup>**.
- For the WMCA GVA per head needs to increase by **£4,064** to be in line with the UK.



Raising Productivity and Eradicating the £16.5bn Output Gap Double total GVA by 2030



Source: ONS (2017) GVA for Local Enterprise Partnerships

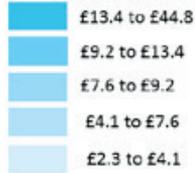
<sup>2</sup> Office for National Statistics (ONS) (2017) Gross Value Added (GVA) for Local Enterprise Partnerships (LEPs).

<sup>3</sup> ONS (2017) Regional gross value added (income approach) reference tables.

<sup>4</sup> Please note that this is based on the latest ONS GVA LEP 2017 data. The previous 2013 baseline figure for the GVA per head was £19,423 and has changed to £20,137 due to subsequent ONS revisions made to the baseline.

The following map shows the ambitions for each area under the WMCA SEP vision scenario (as illustrated by the colours) and the additional GVA impact as numbers.

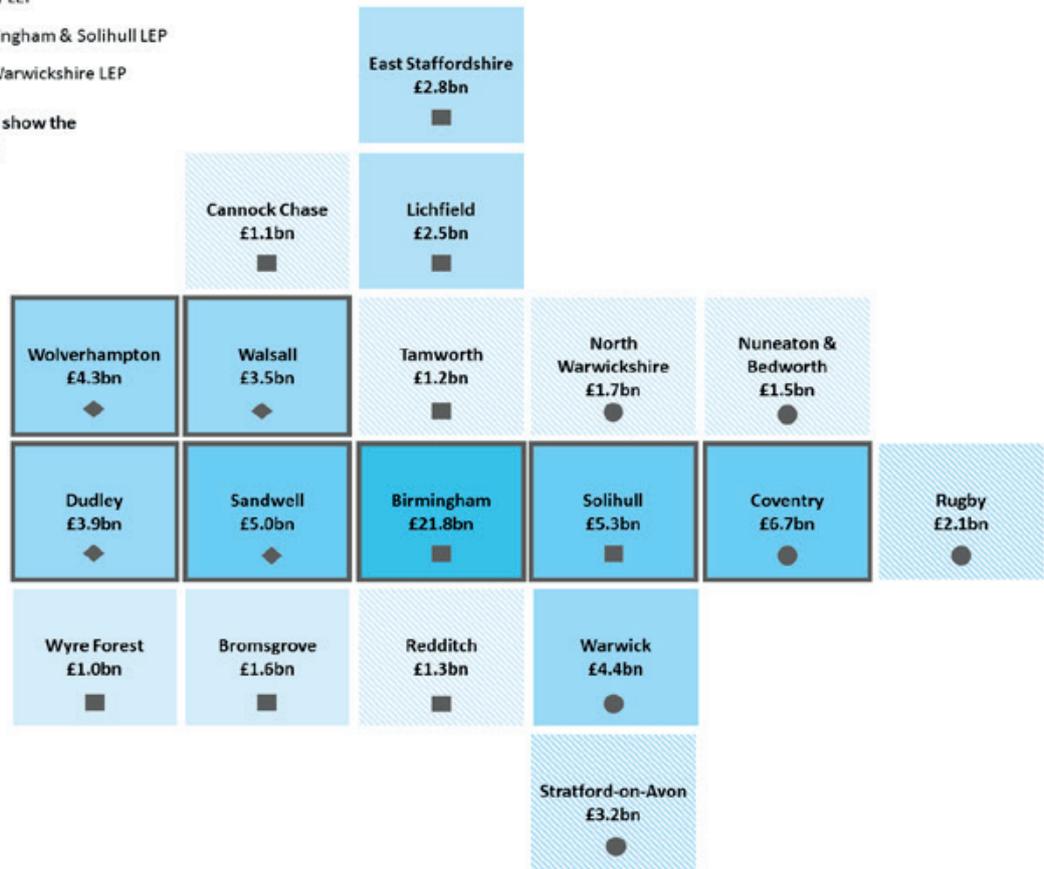
**WMCA SEP GVA to 2030 (£bn)**



**WMCA Membership Type**



The figures on the map show the additional GVA impact.



## Economic Growth

- Since 2013, total WMCA GVA has increased each year and overall by **£6.9bn**. In the context of the UK average, despite the WMCA total GVA growing at a faster rate there is still an output gap of **£16.5bn**.
- The figure below demonstrates the components of the output gap and outlines the impact on productivity.
- Insufficient skills levels and too few residents in employment account for **56%** of the overall **£16.5bn** output gap. The remaining **£7bn** can be attributed to an economy lacking dynamism which represents low performance in competition, lack of investment, enterprise and innovation.

### WMCA Output Gap £16.5bn<sup>5</sup>

#### Skills Level Insufficient<sup>6</sup>

% with NVQ 4+

WMCA = 30.4%

UK = 38.0%

**£3bn**

Contribution to the output gap

An increase of 185,010 people qualified to NVQ4+ required to meet UK

#### Too few in Employment<sup>7</sup>

Employment rate

WMCA = 68.4%

UK = 73.9%

**£6.5bn**

Contribution to the output gap

An increase of 129,939 people in employment to meet UK average

#### Economy Lacking in Dynamism<sup>8</sup>

Business Births per 10,000 population

WMCA = 55

UK = 59

Business Stock per 10,000 population

WMCA = 358

UK = 410

% of innovative business

West Midlands = 55%

UK = 53

**£7bn**

Contribution to the output gap

An increase of 1,468 business births per year required to meet UK average

<sup>5</sup> The previous GVA 2013 baseline figures put the WMCA output gap at £14bn. The £16.5bn output gap is using the GVA 2013 figures which have subsequently been revised by ONS.

<sup>6</sup> ONS (2017) Annual Population Survey

<sup>7</sup> ONS (2017) Business, Register and Employment Survey 2016

<sup>8</sup> Department for Business, Energy & Industrial Strategy (2015) UK Innovation Survey 2015: 2012- 2014 Statistical Annex.

<sup>9</sup> ONS (2016) Annual Population Survey 2015

## Productivity Challenge

- The WMCA has seen significant improvements in performance over the past year across a number of measures – the number of NEETs has decreased, workforce jobs have increased, wages are up and there are more businesses and homes in the area.
- However, current performance generally remains below the UK average and productivity remains low.
- The gap in GVA per head between the WMCA and the UK average is currently **£4,064**. In addition the WMCA is falling below the UK average on education, skills and unemployment which remains a key challenge.
- There are also productivity issues in regards to the occupational structure of the WMCA economy.
- The WMCA region has fewer managers, senior professionals and technical roles than across the UK, with **13.6%** individuals in employment, compared to **15%** across the UK.
- The strategic programmes in the WMCA SEP will seek to address these areas to secure transformational change and support economic growth.
- A Productivity and Skills Commission has been launched to initiate action and address these issues. The Commission has been tasked to establish the true nature and extent of the Productivity & Skills challenge for the WMCA whilst identifying the individual causes and issuing recommendations to address arising issues.

## Fiscal Gap

- The WMCA must become a net contributor to the national purse. All three LEPs are currently cost centres with a net deficit of approximately **£4.5bn** from **£3.9bn** the year before where tax income is estimated at **£31.1bn** and public expenditure at **£35.5bn**.

WMCA Income and Expenditure 2015 and 2016



Source: Black Country Economic Intelligence Unit

- The deficit increase is primarily due to faster growth of expenditure than income (**2.7%** and **1.3%** respectively over the year). Growth across income streams is primarily focused on rises in Income Tax and National Insurance contributions, whereas growth across expenditure streams has been led by an increase in both Health and Social Protection expenditure.

## Section 4:

# **Business competitiveness**

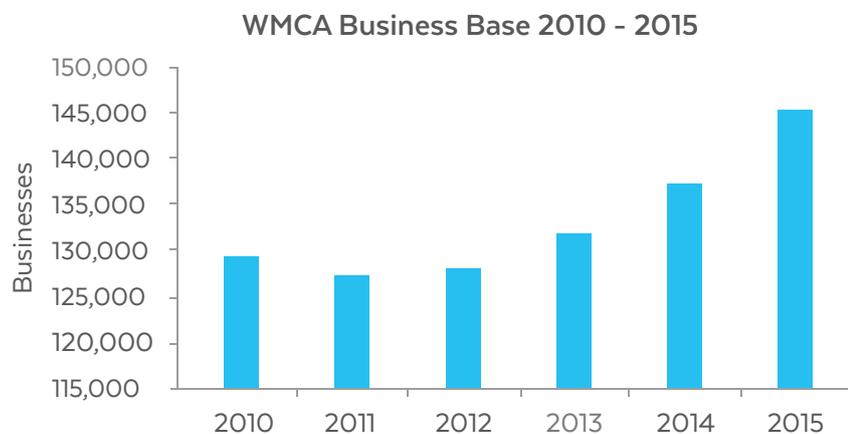
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## Business competitiveness

**OUTCOME – Improved the productivity of our businesses focussing on our growth sectors**

### WMCA Business Base

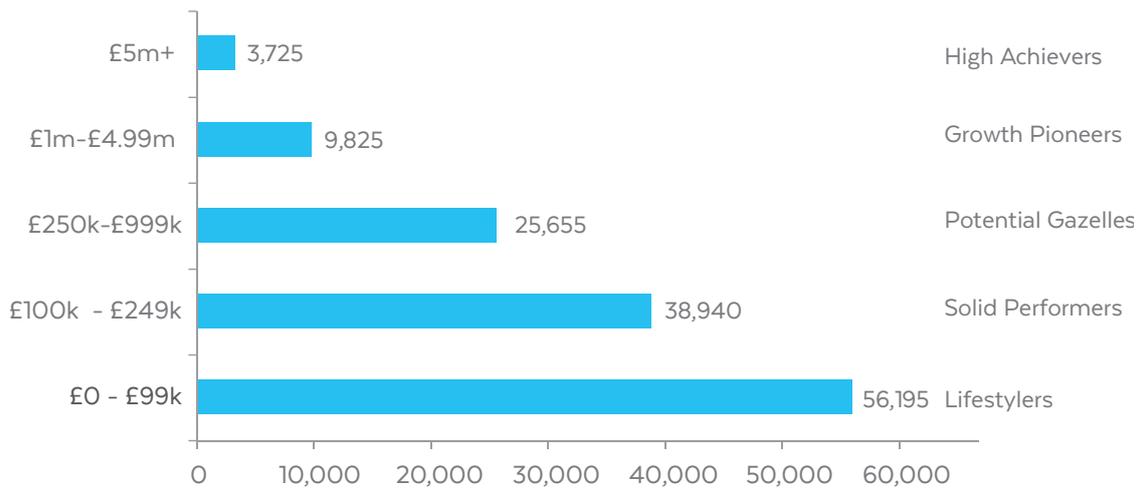
- There are currently **145,410** active companies in the WMCA. This is an increase of **8,040** businesses on the previous year. From 2010-2015, the business base has increased by **12.4%** compared to **13.6%** across the UK.<sup>10</sup>



Source: ONS (2016) UK Business Demography, UK: 2015

- These firms have been categorised into five groups based on their turnover band<sup>11</sup>.
- 1. There are **3,275** “High Achiever” companies, these firms have a turnover of more than **£5 million** a year and account for **2%** of the business base.
- 2. “Growth Pioneers” are second tier growth firms turning over **£1m - £4.99m - 9,825** companies account for 7% of the business base.
- 3. The **25,655** “Potential Gazelles” are companies turning over **£250k - £999k** and account for 29% of the business base.
- 4. The **38,940** SMEs with a turnover between **£100k** and **£249k** are classified as “Solid Performers” and account for **29%** of the business base.
- 5. Firms turning over less than **£100k** are classed as “Lifestylers” (including micro enterprises) makes up the majority of the business base with **56,195** accounting for **42%** of the total.

WMCA Business Base 2016



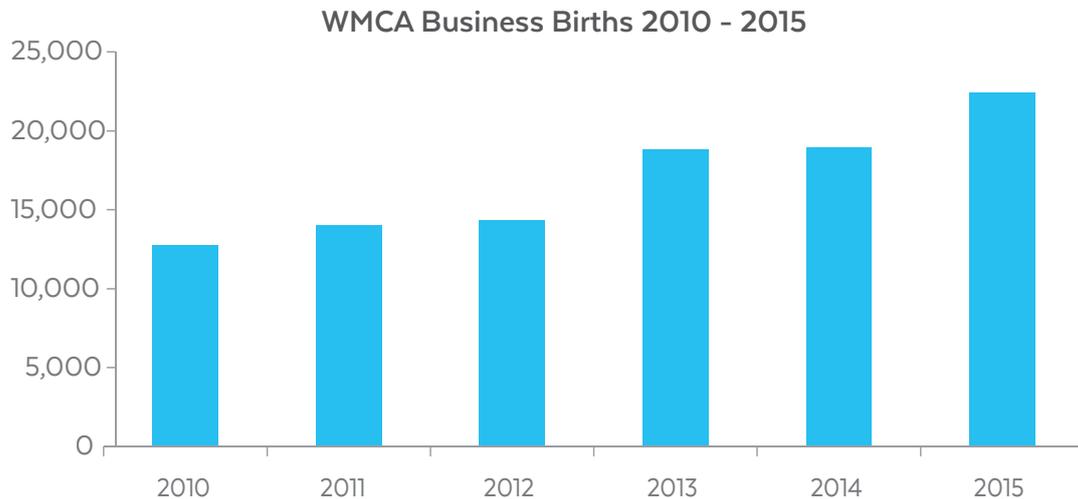
Source: ONS (2017) UK Business - Activity, Size and Location 2016

<sup>10</sup> Office for National Statistics (2016) Business Demography, UK: 2015

<sup>11</sup> The Business Demography dataset does not provide a breakdown by turnover of the 145,410 registered enterprises. However, this breakdown can be obtained via the ONS UK Business - Activity, Size and Location dataset (Enterprise by Turnover size band and UK Local Authority Districts, including UK total), which provides a snapshot (March 2016) of the Business Demography dataset. At the time of the snapshot 133,890 enterprises in the West Midlands Combined Authority has been used for turnover analysis.

## WMCA Business Births

- **22,430** new businesses were started across the West Midlands Combined Authority in 2015. This is **19.3%** more business births than in 2013 compared to just **10.6%** across the UK.
- The number of business births equates to **55** businesses per **10,000** population compared to **59 per 10,000** population for the UK.
- The WMCA needs to create an additional **1,468** businesses each year on top of the current **22,430** new business births to achieve the current UK average.



Source: ONS (2016) Business Demography, UK: 2015

# Business Sectors

- There are currently **2 million** people working the West Midlands Combined Authority area<sup>12</sup>.
- We have identified seven transformational sectors and three enabling sectors that will be the drivers of growth across the West Midlands.
- Our Economic model sectoral analysis sets out the composition of jobs by sector. According to our Economic Model analysis there were **1.27m** people employed in our transformational sectors in **2013**<sup>13</sup> and our ambition is to grow to **1,466,000** jobs by 2030. GVA growth is forecasted to increase from **£71bn** to **£71.3bn** in the same period.<sup>14</sup>
- There were **718,000** jobs in the enabling sectors. Our ambition is to grow jobs in these sectors by **219,000** net new jobs by 2030. GVA in the enabling sectors is expected to increase from **£16.1bn** to **£40.6bn**. (highlighted figures need to be updated to current GVA prices)



<sup>12</sup> Nomis (2016) Business Register and Employment Survey 2015

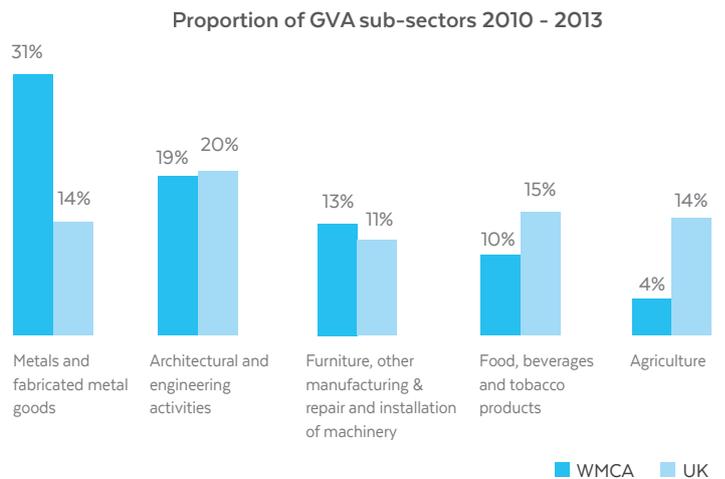
<sup>13</sup> 2013 is the baseline figure for the model

<sup>14</sup> The level of detail required at industry level for GVA is not available from ONS therefore the EIU have applied the proportion of GVA by sector from the Oxford Economic Model and applied to the ONS GVA figures to provide an estimate.

# Sector Dashboards

We have developed a dashboard for each sector to enable us to target our action to support economic growth<sup>15</sup>. The dashboards include: the scale of GVA, jobs and businesses for each sector and sub sectors and the comparison of the proportion of GVA and jobs to the UK average - current and ambition levels. A list of the top performing businesses in each sector with an analysis of financial records to establish GVA contribution, average GVA per employee, GVA growth rates and an overview of the ownership of these businesses. They also map the location of top performing businesses and the strength of the local supply chain.

- For example, our Advanced Manufacturing dashboard reports that:
- The proportions of GVA and Jobs in the WMCA's Advanced Manufacturing sector were above the UK average in 2013, accounting for **11%** of total GVA compared to **9.3%** for the UK and employing **184,000** people; **9.7%** of total jobs compared to **13.7%** for the UK.
- GVA and Jobs in the sector have grown faster from 2010-2013 than the UK average with GVA increasing by **17.3%** compared to **3.8%** for the UK and jobs increasing by **2%** compared to a **0.6%** decrease for the UK.
- The top **3** subsectors for the WMCA are Metals and fabricated metal goods; Furniture, other manufacturing & Repair and installation of machinery, Architectural and engineering activities.
- The top **50** businesses in the WMCA's Advanced Manufacturing sector generate **£3.5bn** GVA and the average GVA per employee for these businesses is **£70,505** compared to the UK average of **£47,612**.

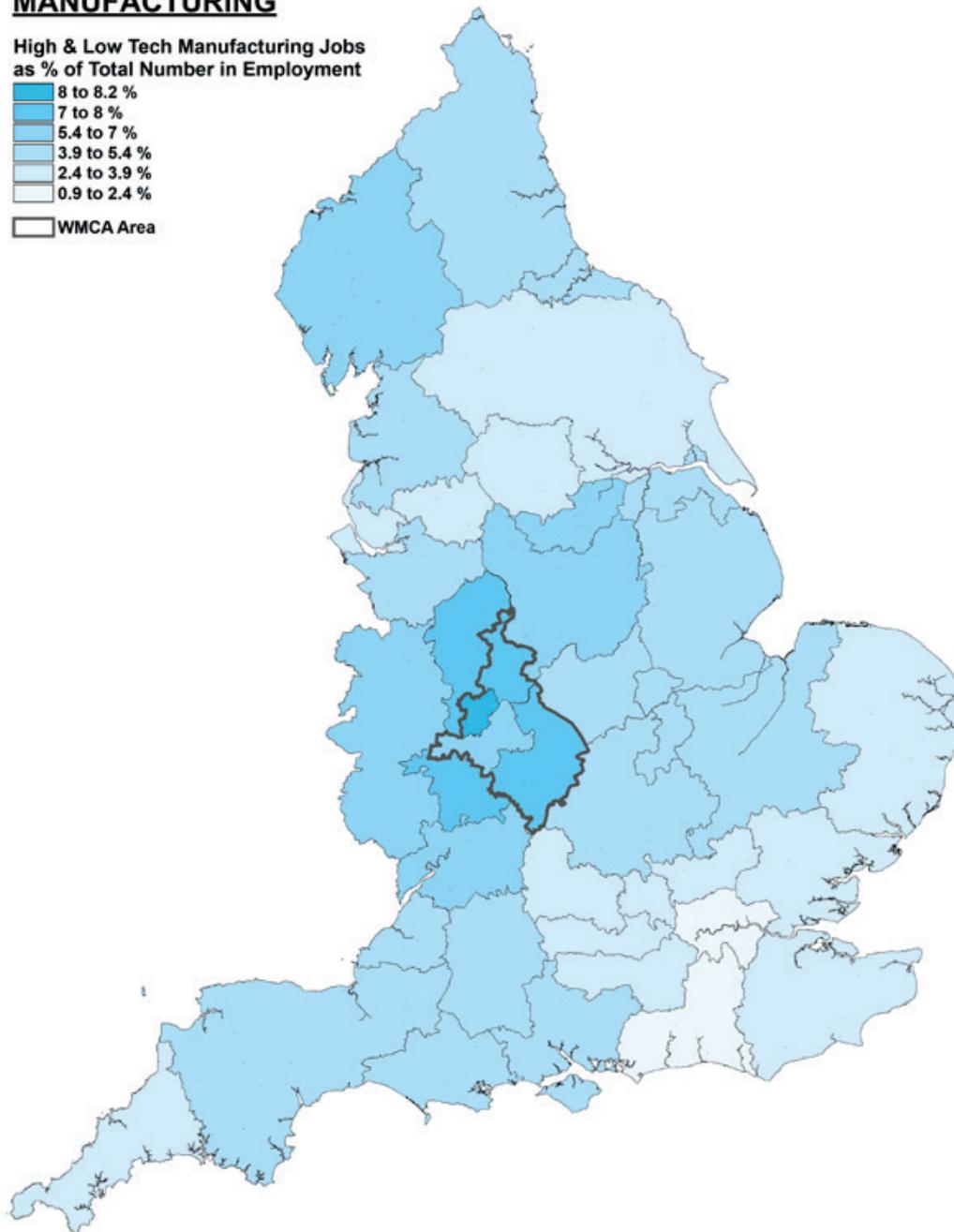
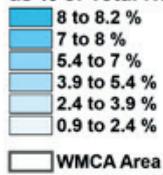


<sup>15</sup>Please see here to view 2013 sector dashboards which were published as part of the WMCA Productivity and Skills Commission Intelligence Pack <https://www.wmca.org.uk/media/1824/annex-1-wmca-productivity-commission-intelligence-pack-08122016.pdf>. The EIU will be updating the full sector analysis in due course.

The following map illustrates the number of advanced manufacturing and engineering jobs as a percentage of total employment across the UK.

### MANUFACTURING

High & Low Tech Manufacturing Jobs  
as % of Total Number in Employment



Scale: 1:1,853,000

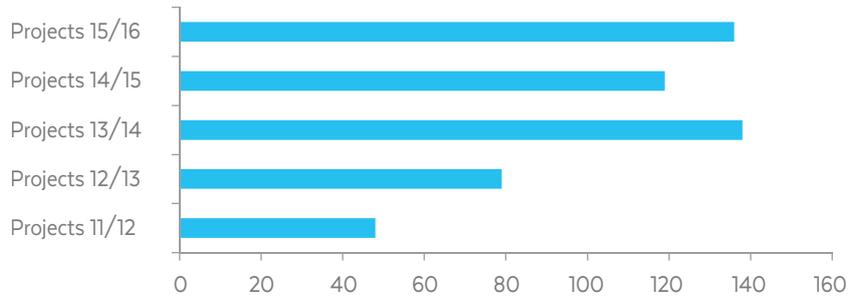
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# Foreign Direct Investment & International Trade

- The WMCA has received **520** Foreign Direct Investment (FDI) projects from **44** different countries across the world. This has led to the creation of **33,000** new jobs and the safeguarding of a further **11,600** jobs since **2011/12**<sup>16</sup>.
- The number of FDI projects in the WMCA area has almost tripled from **48** in 2011/12 to **136** in 2015/16. This far exceeds the average growth rate for the whole of the UK which grew by **57%** in the same period.

Number of FDI Projects across the WMCA (2011/12 - 2015/16)



Source: Department of International Trade (2017) Inward Investment

- The average number of jobs created per FDI project in the WMCA also outperforms the UK average with **63** jobs being created per FDI project in the WMCA and **39** jobs created per project across the UK.

### FDI into the WMCA - 2011-2016

 <b>520 FDI PROJECTS</b>	<b>33,000 JOBS CREATED</b>	 <b>180% GROWTH</b> IN PROJECTS WON SINCE 2011/12
 <b>FDI FROM 44 DIFFERENT COUNTRIES</b>	 <b>TATA CREATED 8,900 JOBS SINCE 2011/12</b>	<div style="background-color: white; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> <span style="font-size: 24px; font-weight: bold;">63</span> </div> <b>AVERAGE JOBS CREATED PER PROJECT</b>

Source: Marketing Birmingham

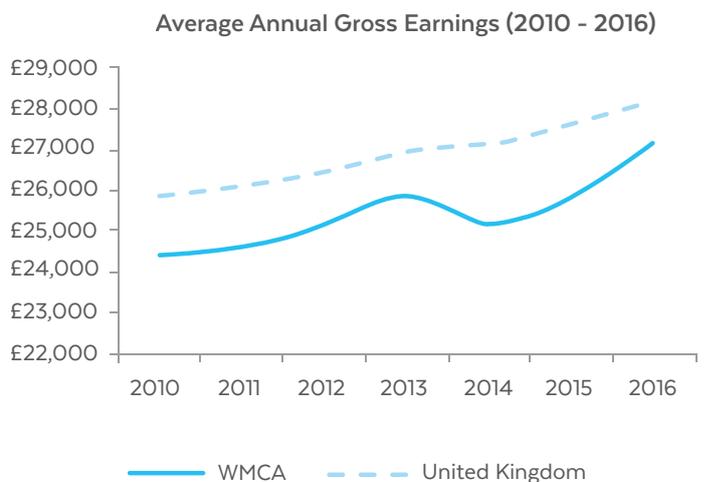
<sup>16</sup> Department of International Trade (2017) Inward Investment

- There have been many significant investments into the WMCA in the last five years. By far the biggest investor is the Tata Group of India with **16** investments across seven sites within the WMCA. Between them these investments created **8,900** new jobs.
- Other significant investments include Genting Berhad of Malaysia opening Resorts World in Solihull, Sigma of Redditch (now owned by Digicall of South Africa) expanding into Birmingham creating up to **1,000** jobs, German utilities provider ExtraEnergie also aiming to create **1,000** jobs in Birmingham.
- US retail giant Amazon are expanding in Rugeley, London Taxi International owner Zhejiang Geely of China are greatly expanding in Coventry as are Brose of Germany. US based Advanced Computer Software has taken on **550** in Birmingham, UTC Aerospace of the US is expanding in Wolverhampton and Deutsche Bank continues to grow in Birmingham.



## Earnings

- The total average annual earnings for the WMCA rose by **£1,311** on the year before to **£27,151** in 2016. This is **3.9%** lower than the UK average of **£28,213<sup>17</sup>**.
- Although average earnings are lower than the UK, the WMCA average earnings are growing at a faster rate.
- Between 2010 and 2016, total average annual earnings in the WMCA increased by **£2,731** increasing by **11.2%** compared to **9%** across the UK.



<sup>17</sup> Nomis (2017) ONS Annual Survey of Hours & Earnings 2016

# Section 5:

## How we work

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How we work

# Raising Employability, Education & Skills

HEALTH OUTCOME: Better quality of life for all: improved health physical/mental health and wellbeing

CRIME OUTCOME: Reduce offending and re-offending rates

- The number of jobs in the WMCA region has been increasing year on year, a **5%** rise since 2013.
- The proportion of NEETS in the WMCA continues to decline (**5.8%** in 2014 to **4.4%** in 2015).
- The number of those with no qualifications has decreased from **14.5%** to **13%**
- The number of people claiming key out-of-work benefits is at the lowest level for 10 years.

**West Midlands Jobs**

Higher proportion of employment than the national average in many sectors incl.:

- MANUFACTURING
- CONSTRUCTION
- TRANSPORT
- EDUCATION

**INCREASE OF 95,000 JOBS (5%) SINCE 2013**

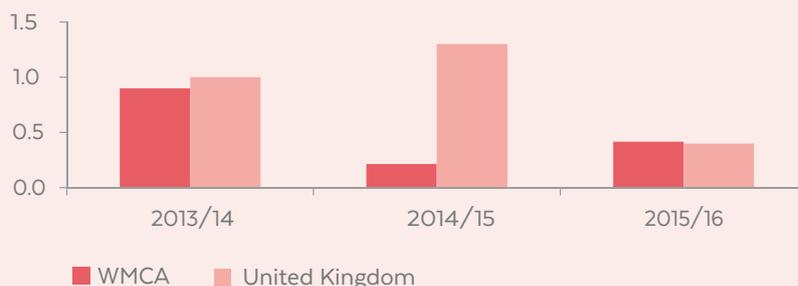


**WMCA employment rate continues to RISE year on year.**



- There are 2 million jobs in the WMCA; this has grown by **5% (94,880)** since 2013<sup>18</sup>.
- The largest number of jobs in the WMCA are in the Business, Professional & Financial Services (**327,000**) followed by retail (**318,000**) and then the Public Sector including Education (**250,000**).
- The WMCA has a higher proportion of employment than the UK in Advanced Manufacturing and Engineering, Transport Technologies and Retail<sup>19</sup>.
- The WMCA falls below the UK average in managerial, professional and technical occupations, but is above the UK benchmark in lower skilled occupations<sup>20</sup>.
- The employment rate across the WMCA has risen year on year, increasing at the same rate as the UK between 2015 and 2016 (+0.4pp).

Percentage Growth in Employment Rate (2013/14 - 2015/16)



<sup>18</sup> Oxford Economic Model 2017

<sup>19</sup> Oxford Economic Model 2017

<sup>20</sup> Employment by occupation based taken from Annual Population Survey 2016

The following map illustrates the distribution of the WMCA SEP 2030 jobs growth ambitions.

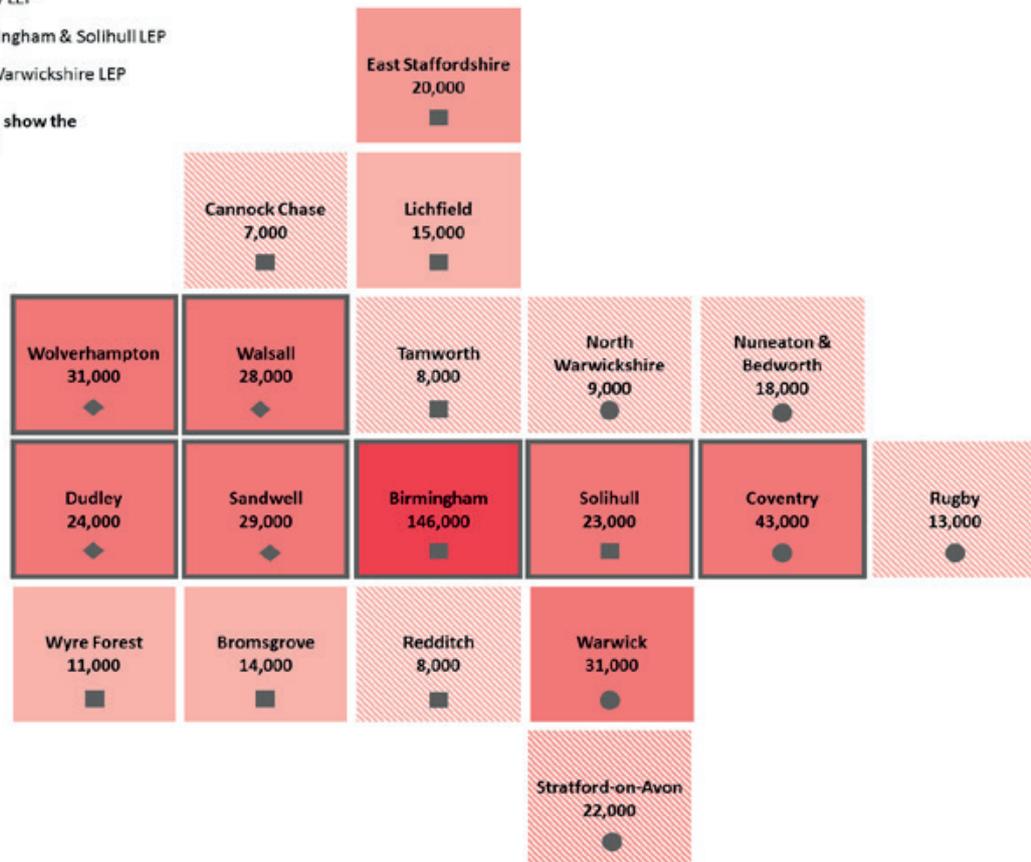
**WMCA SEP Jobs by 2030**



**WMCA Membership Type**

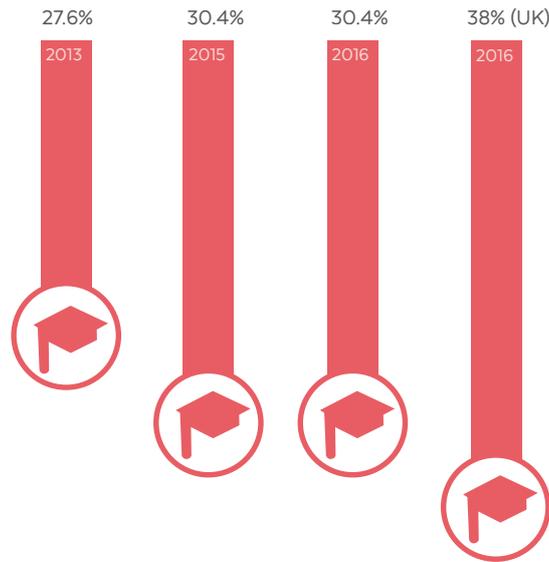


The figures on the map show the additional jobs impact



- In the WMCA **774,300** people are qualified to degree level or equivalent (**30.4%**). This is a 7,700 increase on the year before. However there has been no overall increase in the percentage which has remained constant at **30.4%** of working age residents being qualified at this level.
- Across the UK 15.5m are qualified to degree level or equivalent and **521,800** more people were qualified at this level than in 2015, resulting in a 1.1pp increase.
- To reach the UK average of **38%** the WMCA requires a further **185,010** people to be qualified at this level<sup>21</sup>.

Percentage of people in the WMCA with degrees is below UK average but increasing year on year



- The proportion of WMCA residents with no qualifications decreased from **14.5% (365,600)** in 2015 to **13% (329,400)** in 2016. To reach the current UK average (**8.3%**) requires a further upskilling of **119,867** people.

Percentage of people with no qualifications (2010 - 2016)



Source: ONS (2017) Annual Population Survey 2016

- The proportion of working age residents with no qualifications is falling faster than the UK average. In addition, the take up of trade apprenticeships, those with other qualifications and people qualified to NVQ1 and NVQ2 level or equivalent has increased at a higher rate than compared to the UK.

<sup>21</sup>All qualifications data taken from the Annual Population Survey, January-December 2016

## Apprenticeship starts

- In 2015/16 there were **42,040** apprenticeship starts across the WMCA showing a **16.7%** increase since 2013/14, compared to **15.9%** across England.
- Intermediate Apprenticeships make up the majority of all apprenticeship starts (**58.8%**) whilst **35%** of apprenticeship starts are at advanced level and **6.2%** are higher apprenticeships.<sup>22</sup>
- **45%** of apprenticeship starts are in the 25+ age group and **29%** are delivered to 19-24 year olds with the remaining **26%** being provided to under 19s.
- The WMCA’s ambition is to raise overall apprenticeship starts to **84,000** by 2030. To do this the WMCA needs to create nearly double the current number of apprenticeship starts per annum.

### Apprenticeship starts



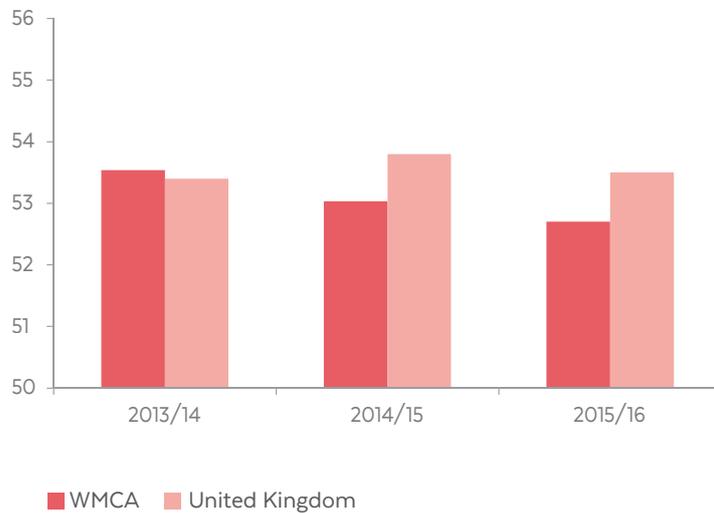
Source: Department for Education (2017) Apprenticeships by geography, age and level: starts 2005/06 to 2016/17 reported to date

<sup>22</sup> An Intermediate apprenticeship is equivalent to five GCSEs with a grade C or above. Advanced apprenticeships are equivalent to 2 A Level passes and also include Level 3 NVQs, Functional or Key Skills. A Higher Apprenticeship refers to level NVQ Level 4+, Foundation degrees and BTECs.

## Schools Performance

- 98 out of 213 schools (46%) across the WMCA met geography scored above the national rate of 53.5% at 5+ A\*-C GCSEs including English and Maths in 2016.
- The percentage of students who have achieved 5+A\*-C GCSEs including English and Maths in the WMCA area is **53%** and has decreased by 5pp since 2013/14.<sup>23</sup>
- Across England the GCSE pass rate increased by 0.4pp over the same period.
- The WMCA GCSE pass rate is **0.8pp** lower compared to the national rate.
- In June 2016 a new secondary school accountability system, Progress 8 was implemented. In future years the new measure Progress 8 will be reported.<sup>24</sup>

Percentage of students who have achieved 5 or more A\* - C GCSEs including English and Maths (2013/14 - 2015/16)

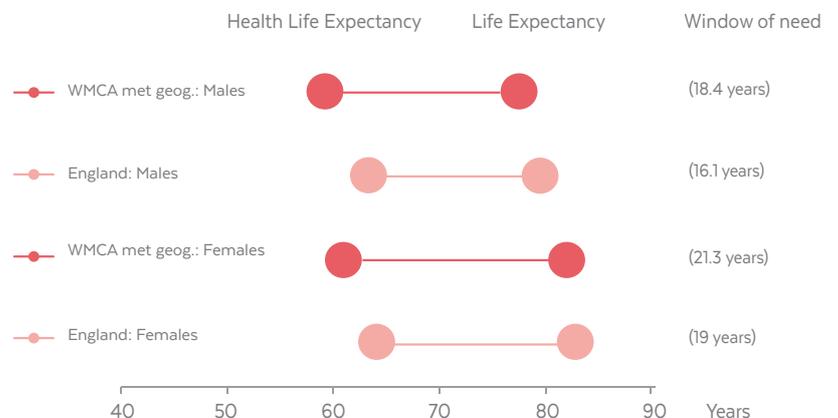


Source: DfE (2017) Compare school and college performance data tool<sup>24a</sup>

## Health & Well Being<sup>25</sup>

### Healthy Life Expectancy

In the WMCA, across the seven metropolitan areas, the healthy life expectancy (HLE) for males and females is 59.3 years and 60.9 years respectively. This is 63.4 years for males and 64.1 years for females across England. “Healthy life expectancy” refers to the number of years a person might live in a ‘healthy’ state. The difference between healthy life expectancy and the average life expectancy is referred to as the window of need.



<sup>23</sup> DfE (2017) GCSE and equivalent results in England revised 2009/10 to 2015/16.

<sup>24</sup> Please see DfE website for more details on Progress 8: <https://www.gov.uk/government/publications/progress-8-school-performance-measure>.

<sup>24a</sup> Based on WMCA met geography

<sup>25</sup> This section has been provided by Public Health England.

### Deprivation

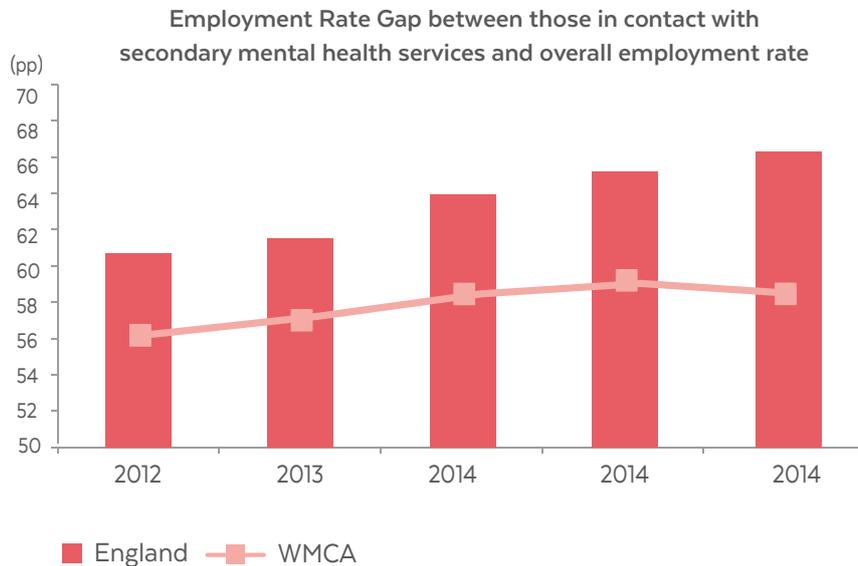
For both males and females in the most deprived communities there is a shorter healthy life expectancy at birth and a longer period expected to be spent in ‘not healthy’ health. The healthy inequality gap between the most and least deprived areas across the WMCA met geography has increased among males from 6.2 years in 2014 to 7.4 years in 2015, whereas for females the gap has decreased from 9.9 years to 9 years. In 2015, 20% of the WMCA population lived in the top 10% most deprived areas.

### Suicide Rates

In 2015, the suicide rate for the WMCA was the same as England at 10.1 suicides per 100,000. However, across England and the WMCA the suicide rate has increased year on year since 2010.

### Employment Rate Gap

The following chart shows the percentage point gap between the percentage of working age adults who are receiving secondary mental health services and in employment and the overall employment rate. The WMCA is ahead of England with a 58.9 employment rate gap compared to 67.2 across England. In 2016, only 6.7% of adults in contact with secondary mental health services were in paid employment across England.<sup>26</sup> The long term goal is to radically increase the number of people in contact with secondary mental health services in employment by 2030 and to narrow the gap between their employment rate.



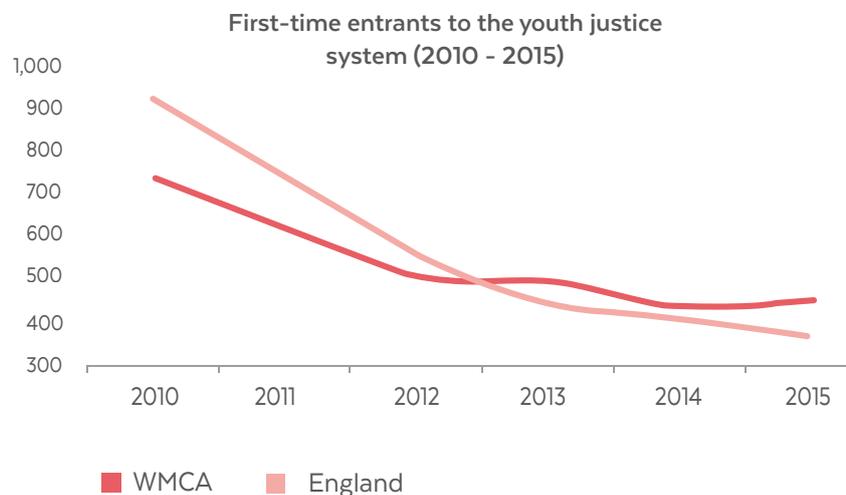
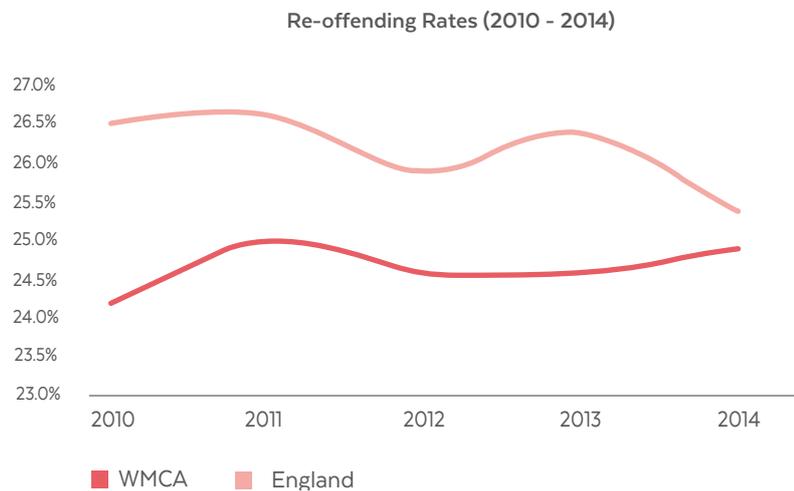
<sup>26</sup> NHS Digital (2017) Dataset: 1F - Proportion of adults in contact with secondary mental health services in paid employment October 2016

## Crime

The number of offences per year has continued to decrease since 2010. 32,008 offences were committed in 2014 - 1,364 less than in 2013 and 7,170 less than in 2011.

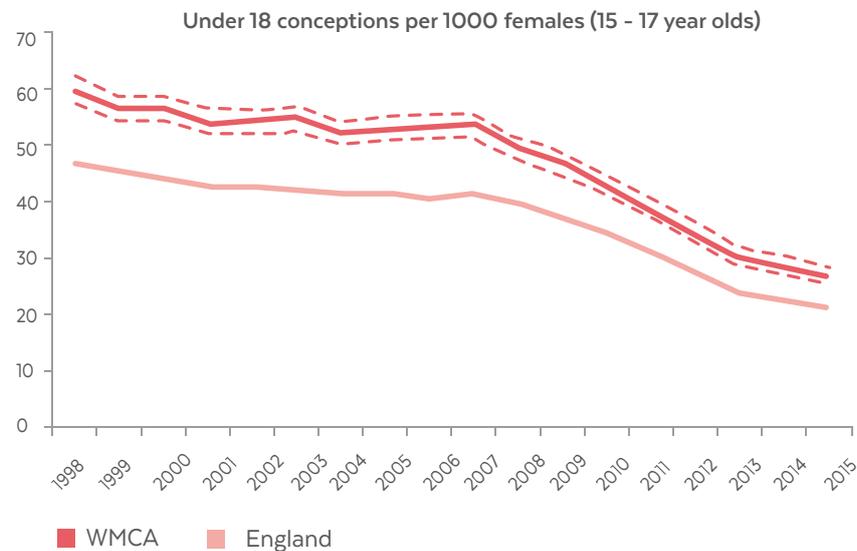
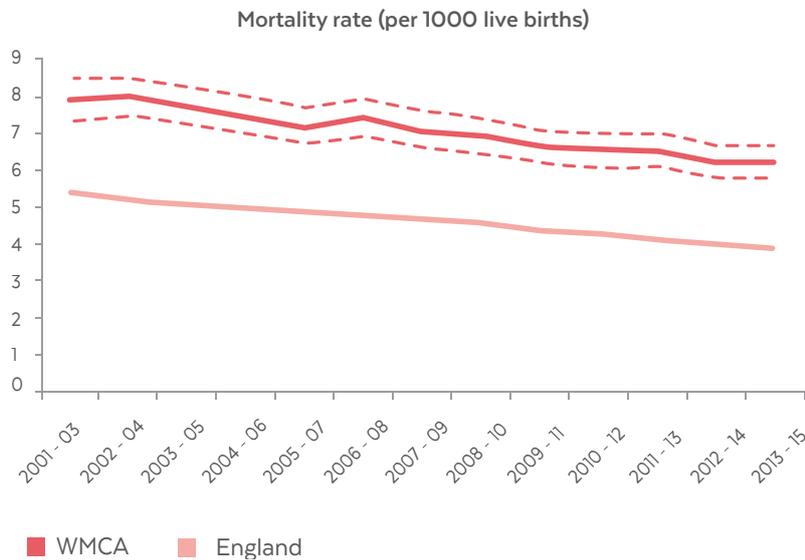
Re-offending rates across the WMCA has increased from 24.6% in 2013 to 24.9% in 2014. However, this is still lower than the re-offending rates for England where 25.4% of offenders re-offend.

In contrast, 454 per 100,000 (10-17 year olds) entered into the youth justice system for the first time across the WMCA met geography compared to 369 per 100,000 across England. The number of first-time entrants (FTEs) in the WMCA met geography has decreased by 8.2% between 2013 and 2015 and decreased by 17.6% across England during the same period. For the WMCA met geography to reach the national average the number of FTEs needs to be reduced by 85.1 per 100,000 which is equivalent to a 19% reduction.



### Early Years

- At 5.8 deaths per 1,000 live births, infant mortality rates in the West Midlands Combined Authority are significantly higher than the England average of 3.9 per 1000 live births. However, the number of infant deaths annually reduced from 325 to 310 between 2001/3 and 2013/15. For the WMCA to be similar to England there would have to be 100 less infant deaths across the WMCA annually.
- Teenage conceptions (aged 15-17 years) have reduced significantly since 1998, although rates in the WMCA are still significantly higher than for England. In 2015, there were 1,810 births to teenage mothers. For the WMCA to be similar to the England average there would have to be **315** fewer teenage conceptions annually.
- During the period 2015/16, 12.6% of mothers smoked during pregnancy. This is lower than the 15% seen in 2010/11 but still higher than the England average of 10.6%.<sup>27</sup>
- In 2015, there were 1,264 first time entrants to the youth justice system (or 454 per 100,000 10-17 year olds). This is a considerable decrease compared to 2,100 new entrants in 2010 (730 per 100,000). For the WMCA to be similar to England there would need to be **240** entrants to the youth



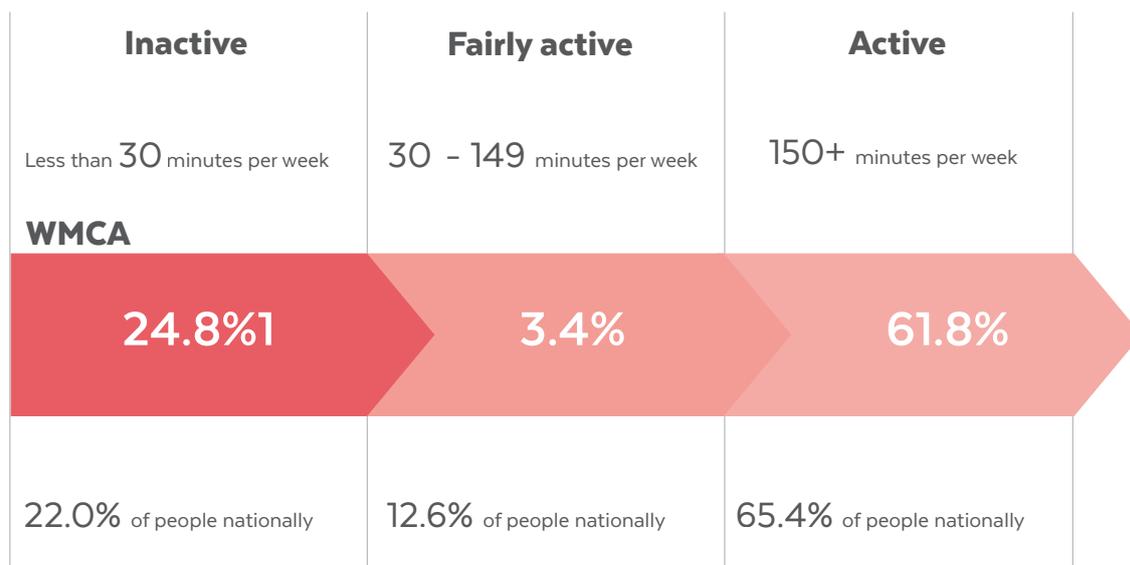
<sup>27</sup> Based on WMCA met geography

<sup>28</sup> Based on WMCA met geography

### Working years and retirement

- The current smoking prevalence across the WMCA is around 16%, similar to the 16.9% seen for England. However, this ranges from around 10% in Warwick to 21.5% in Redditch.
- Across the West Midlands Combined Authority, 11.9% of the households in the area (or 192,215 households) experienced fuel poverty in 2014. This is a reduction from 13.9% (219,240 households) in 2011.
- During the period 2013-15, there were 21,850 deaths which are considered preventable, or around 7,280 deaths annually<sup>29</sup>. This is a reduction from 8,620 deaths annually between 2001 and 2003.
- Around 40% of cancer diagnoses are preventable. Improvements in lifestyles of people in the WMCA could result in 5,588 fewer diagnoses annually. Eradicating smoking altogether could prevent 2,650 fewer cases of diagnosis alone.<sup>30</sup>

### Physically Inactive



Activity includes gardening, walking, cycling, dance, fitness and sporting activities Sport England, Active Lives Survey 2017

- Based on the Active Lives Survey (Sport England, 2017), 61.8% of the WMCA’s population achieve the recommended activity levels of at least 150 minutes a week, equivalent to 1,998,500 people. In order to reach the national average of 65.4%, the WMCA requires an additional 90,524 participants achieving 150 minutes of sports or physical activity per week.

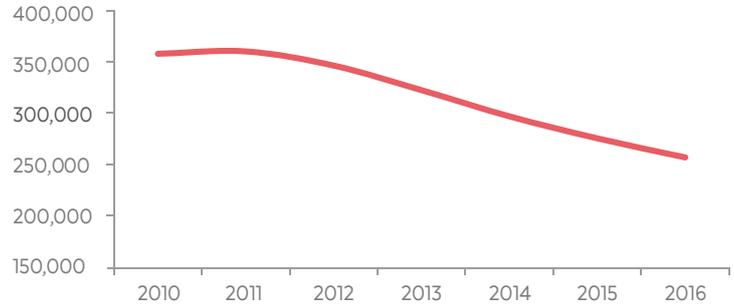
<sup>29</sup> Preventable mortality includes conditions such as those as a result from lifestyle factors - alcohol, drug abuse and diabetes. For a full definition refer to the Public Health Outcomes Framework, indicator 4.03

<sup>30</sup> Based on WMCA met geography

## Unemployment

- 259,470 people aged 16-64 in the WMCA are classed as claiming key out of work benefits (August 2016). This equates to **10.2%** of the working age population. The figure has dropped by **18,850** from the previous year (**6.8%**).
- Jobs Seekers Allowance (JSA) account for **19.4%** (figure excludes Universal Credit) of the **259,470** people claiming benefits and this category has reported the largest fall over the past year - a decline of **8,550** people.
- The numbers claiming ESA and incapacity benefits fell by **7,600** over the same period but still accounts for **64.3%** of all benefit claims. Lone parents account for **13.8%** and this reported a decline of **1,070** people.
- There were **73,535** claimants in the WMCA in March 2017 with a rate of **2.9%**<sup>31</sup>. This figure reflects **1,450** more claimants than the previous month and **3,950** claimants more compared to the same month last year (**69,585**).
- The proportion of Youth Claimants in the WMCA as a percentage of total claimants was **21.4%** in March 2017 (**15,710 youth claimants**) compared to **21.9%** nationally. This figure reflects **510** more claimants than the previous month and **330** more claimants compared to the same month last year (**15,380**).
- **4,420** people (**4.4%**) in the WMCA were classed as NEET (Not in Employment, Education and Training) in 2015, **5.9%** in 2014 and compared to the national average of **4.2%**.

Number of People Claiming Out-of-Work Benefits across the WMCA (2010 - 2016)



Source: DWP, 2016

<sup>31</sup> Department for Works and Pensions, 2017

# Section 6: How we live

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## How we live

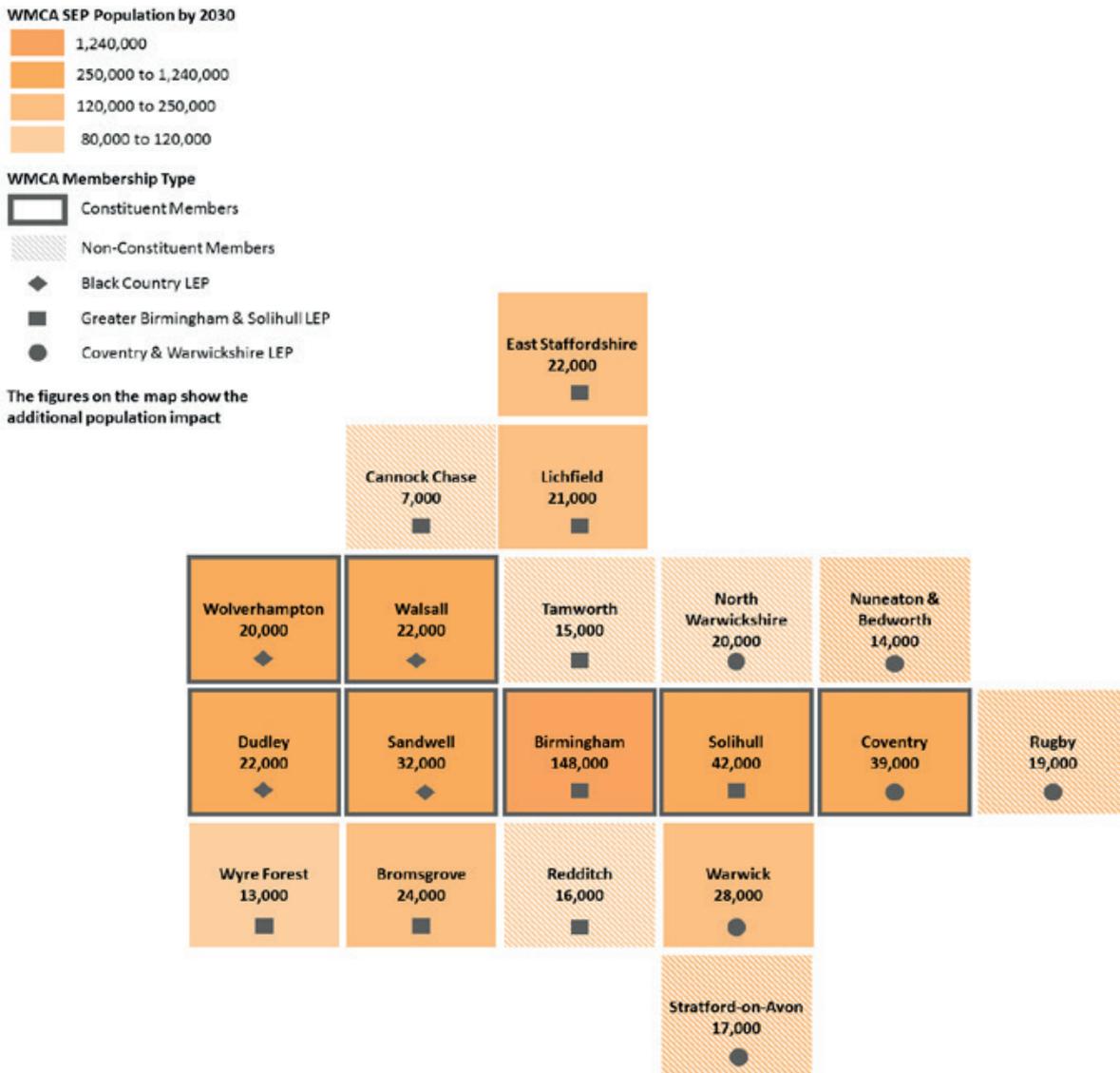
**ACCESSIBILITY**-Improved the Connectivity of People to Businesses to Jobs and Markets

**INFRASTRUCTURE** - Improved the quantity of high quality readily available developments

**SUSTAINABILITY** - Resource efficient economy to stimulate new technology and business

- **4.1m** people living in the WMCA
- Over **12,000** new homes built in the WMCA
- Broadband project already connecting over 1 million premises

The following map illustrates the distribution of the WMCA SEP 2030 population growth ambitions.

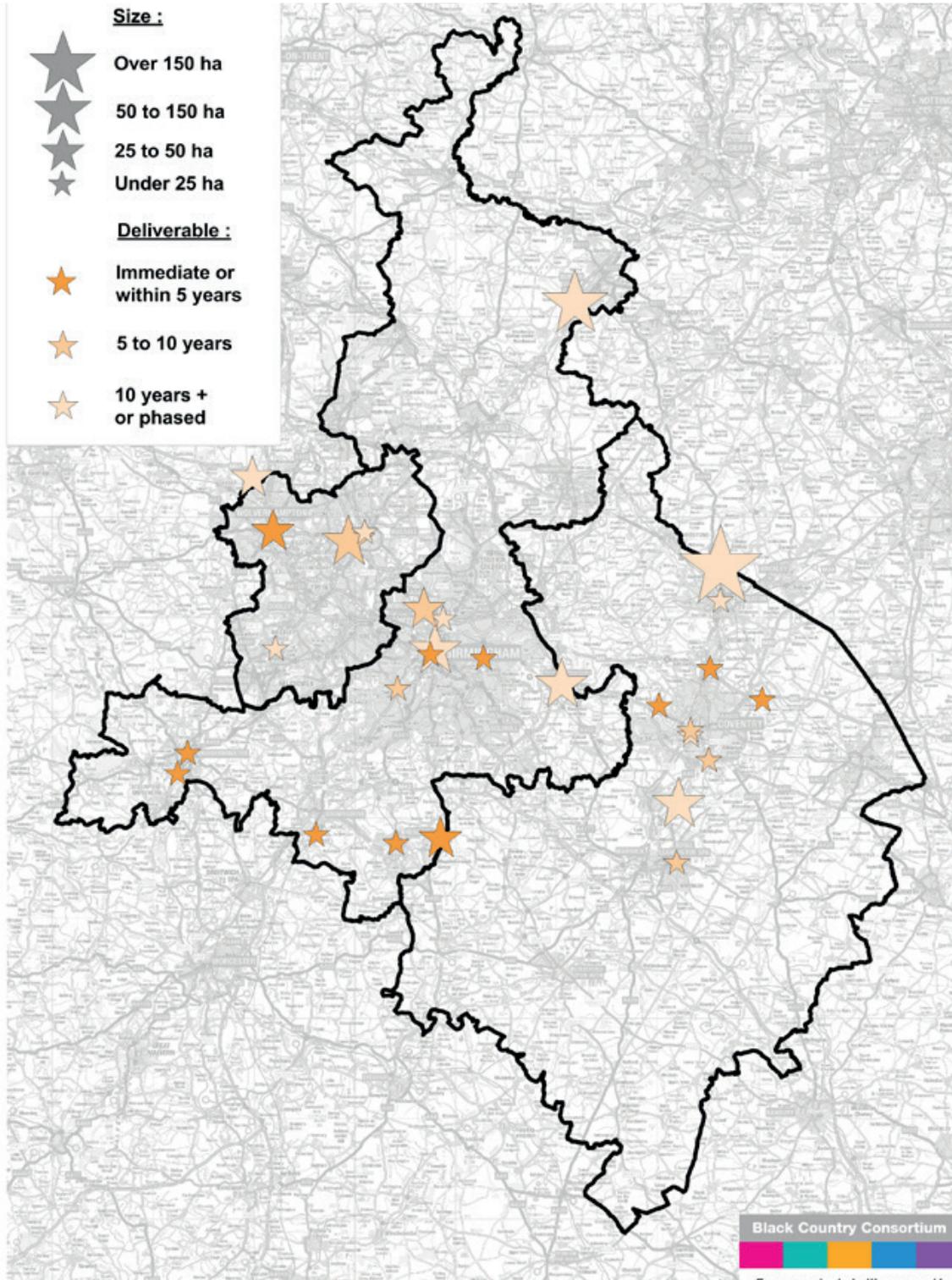


## Employment Land, Housing and Transport

The ambition of the WMCA SEP is to create and/or transform an additional **1,600** ha of brownfield land for first class employment land that is of national significance and meeting the needs of the expanding and new business base.

The map below highlights some of the key commercial sites within the WMCA area. The size of the star indicates the number of hectares of employment land available for that development whilst the colour represents the deliverability timescale.

### WMCA- Commercial let site opportunities

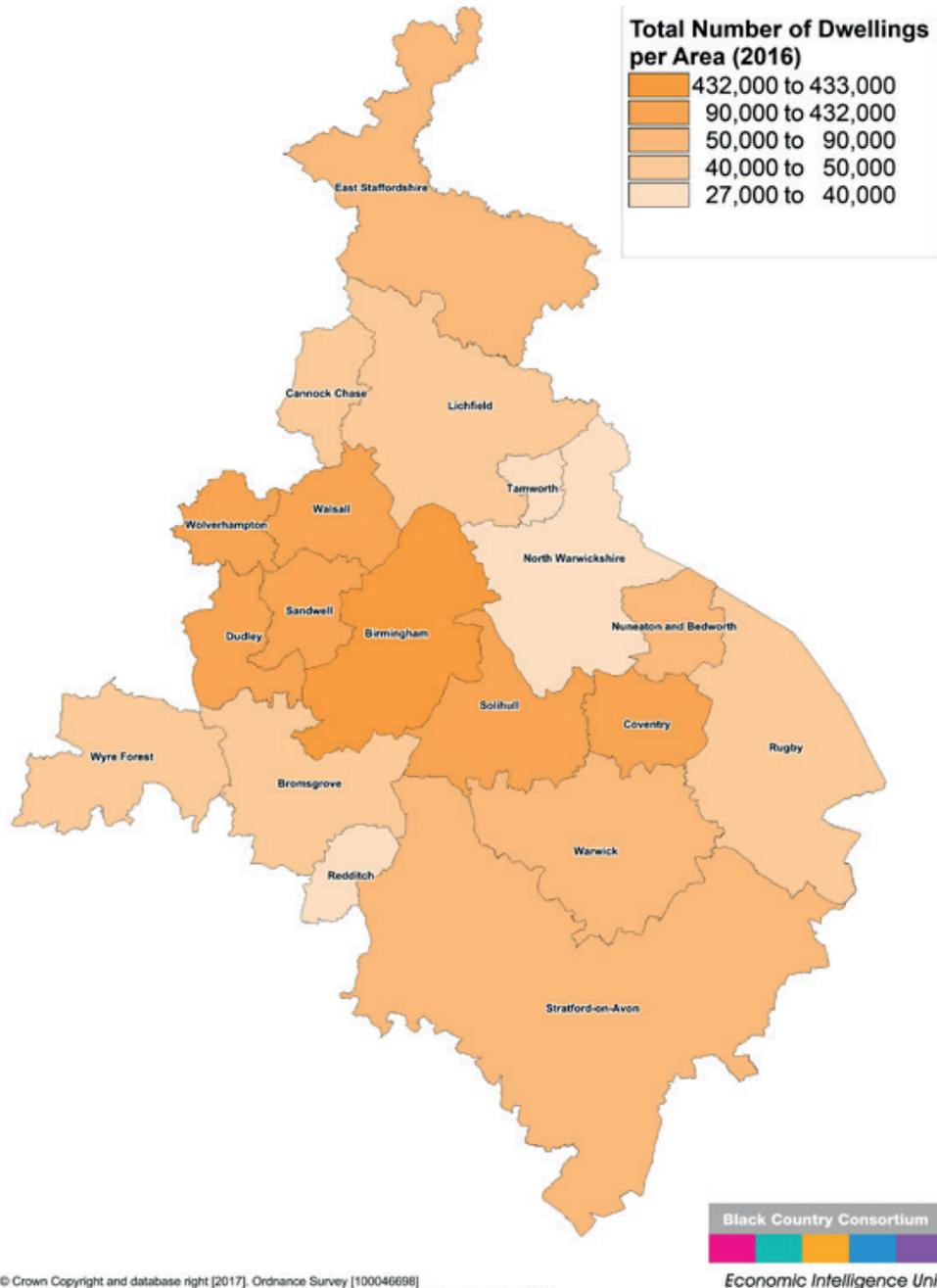


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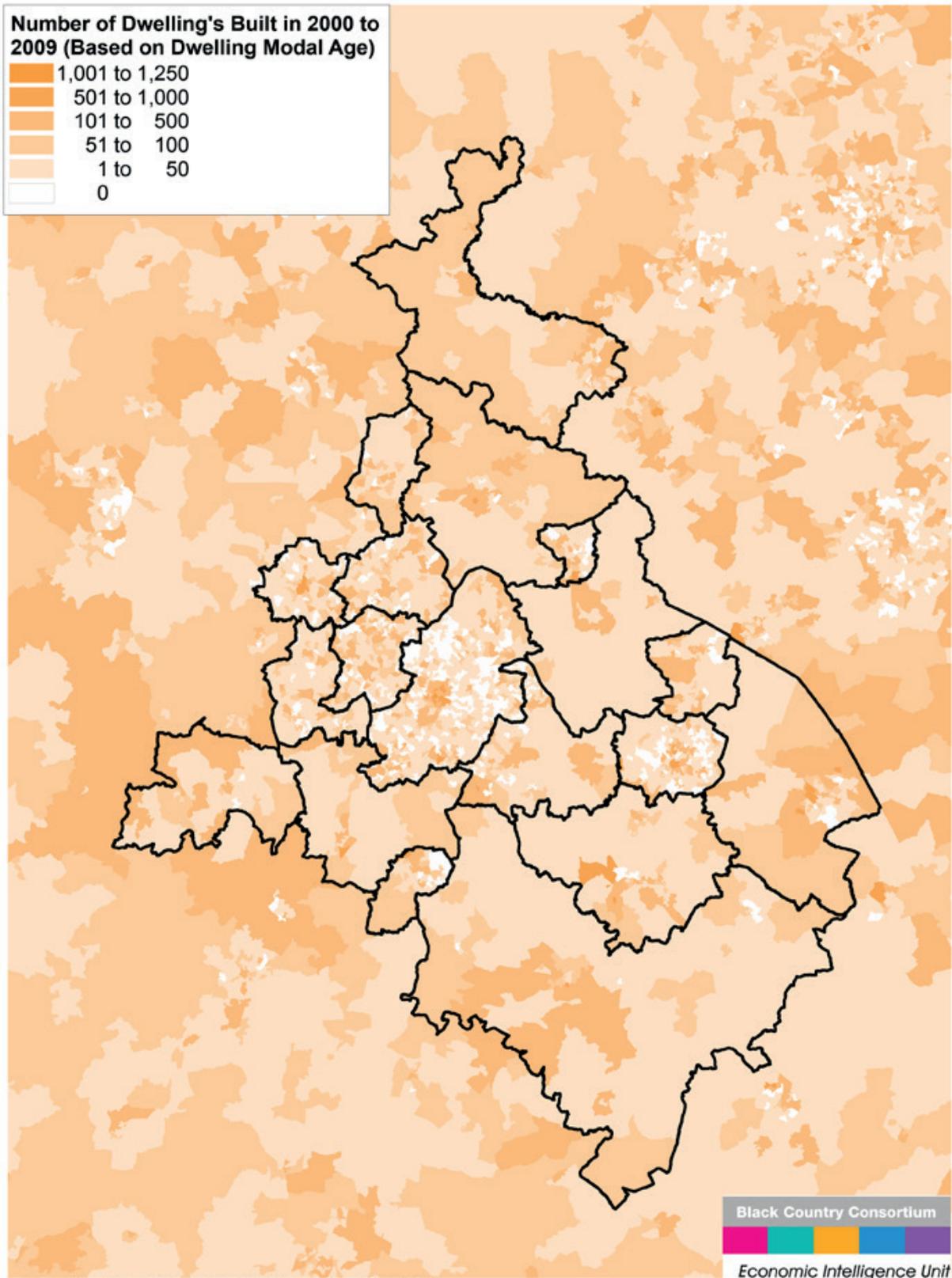
One of the WMCA SEP aims is to expand the construction and renewal of housing stock. There are currently (2016) **1.7 million** homes in the WMCA area whilst the ambition is to build an additional **200,000** homes ensuring there will be **1.9 million** homes by 2030. These additional dwellings are required to meet the demand created by a continued rise in population. There were **12,000** net new homes built in 2015 compared to the previous year and the most net new homes built per year since 2008.

The current total number of dwellings can be seen by district below in the map.

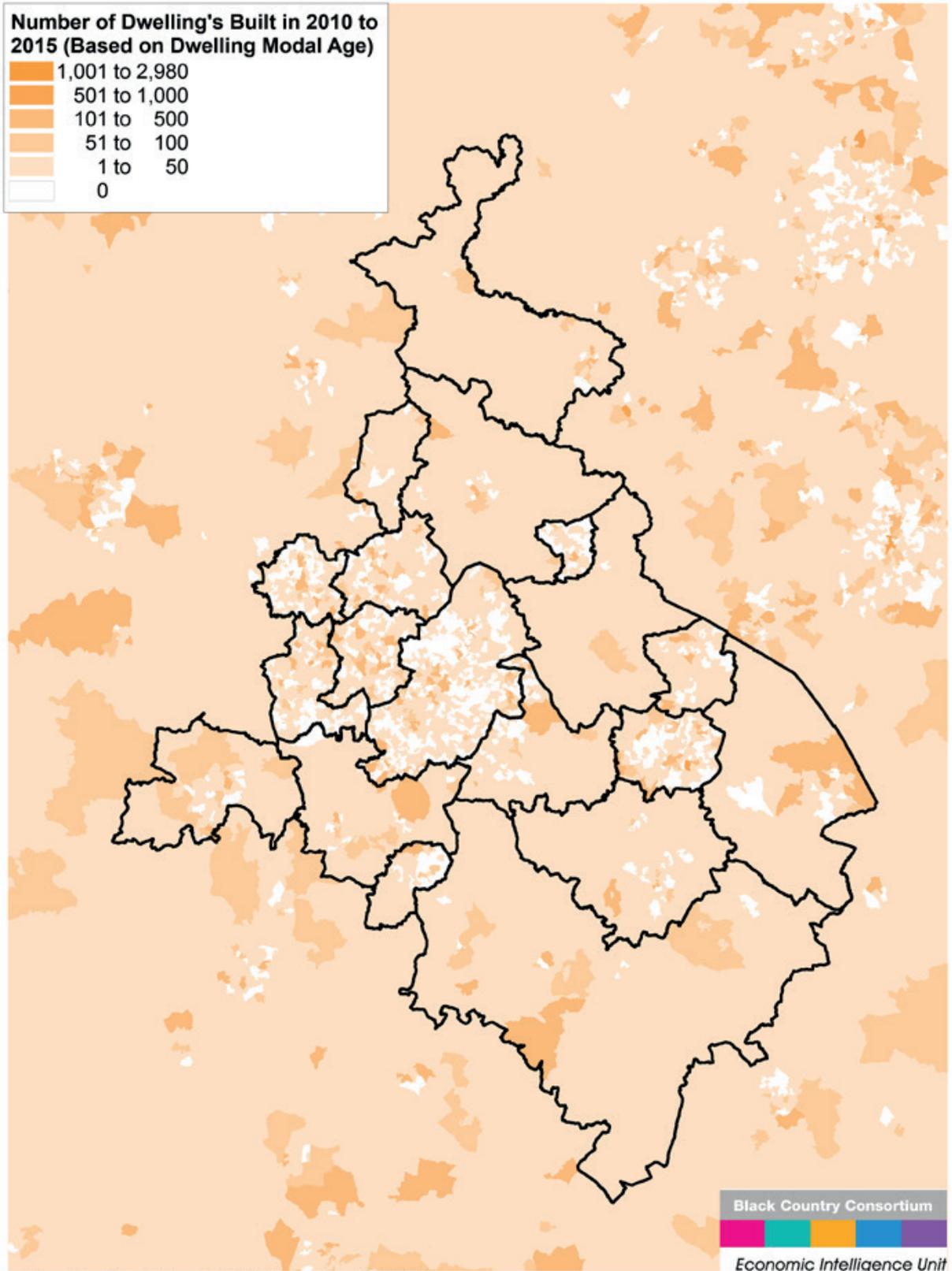
### Total number of dwellings in 2016



The maps below show the number of dwellings built between 2000 to 2009 and 2010 to 2015 (based on the dwellings modal age).



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## Broadband Infrastructure

There are **1,073,154** premises in the WMCA area that have high-speed fibre broadband connectivity.

- **The Black Country Broadband Project**
  - Enabled availability of superfast broadband to over **99%** of homes and business by the end of 2017.
  - So far has connected over **40,000** premises.
  - Voucher Scheme has benefitted over **400** businesses, with ERDF funding secured to continue the scheme.
- **The Coventry, Solihull and Warwickshire Broadband Project:**
  - Will provide availability of superfast broadband to **98%** of houses and businesses by the end of 2019.
  - So far has connected more than **57,500** premises.
  - Voucher Scheme has benefitted over **1,000** businesses, with ERDF funding secured to continue the scheme.
- **Digital Birmingham Project:**
  - Enabled availability of superfast broadband to **95%** of premises across the City
  - Provided free Wi-Fi to **230** public buildings.
  - Voucher Scheme has benefitted over **4,000** businesses.

The map below shows the percent of premises per postcode with superfast broadband coverage (in 2015 where red is under **50%** and green is over **50%**).

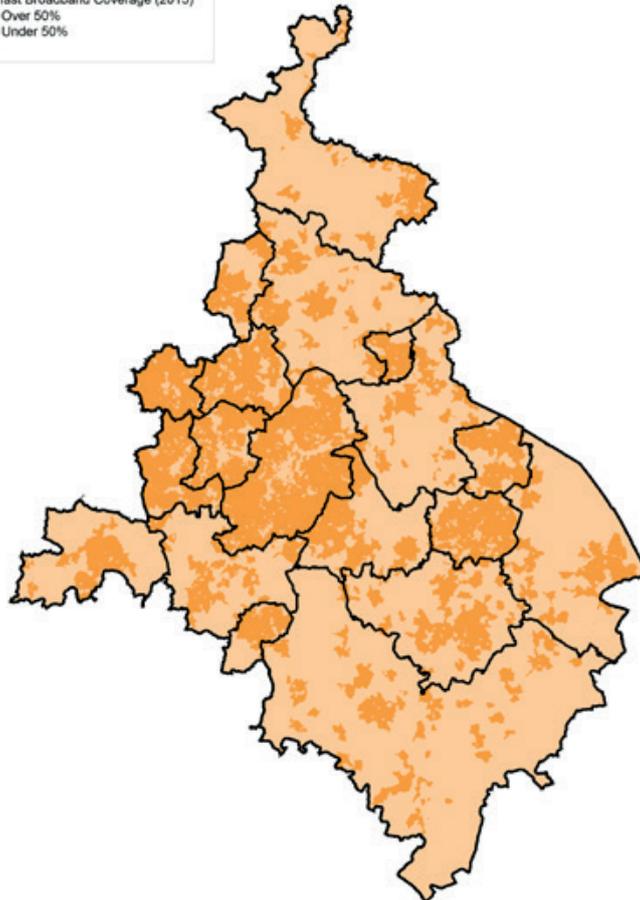
- Working with LINX to establish an Internet Exchange within Birmingham, to cover the WMCA region.

### West Midlands Combined Authority - Broadband

% of premises per postcode with Superfast Broadband Coverage (2015)

Over 50%

Under 50%



## Transport

The Midlands Engine for Growth brings together 10 Local Enterprise Partnerships (LEPs), who together with the local authorities, universities, businesses and other partners will work to grow the economy of the Midlands and the UK as a whole. The Midlands Engine region has a population of over **11.5 million** and an economy worth **£222bn** each year. Partners have agreed to collaborate on plans to boost productivity, attract inward investment, increase connectivity, through Midlands Connect, and build a regional tourism offer.

Connectivity across the Midlands is essential for supporting and attracting businesses as well as highly skilled workers. Improving transport links to speed up journey times across the Midlands can secure a **£1 billion**-a-year boost to the regional economy, create **300,000** additional jobs and save businesses nearly **£500 million**.

The Midlands Connect Partnership and the Department for Transport is developing a transport strategy that identifies the major infrastructure projects needed to improve the connectivity of our region’s key locations so we can help drive economic growth and power the Midlands Engine. The Midlands Connect strategy will not only help release untapped growth across central England but tackle the significant transport challenges that are already impacting on the competitiveness of both the Midlands and the wider UK economy. The strategy was published in March 2017.

At present, **45.6%** of the population across the WMCA met geography can travel to 3 strategic centres within 45 minutes<sup>32</sup>. As the regional centre in Birmingham offers some services and facilities above and beyond those offered in the other nine centres, as well as offering substantial onward connections from New Street station, the following figure reports the proportion of residents who can get to three centres, one of which being Birmingham. **41%** of the population are within 3 strategic centres including Birmingham within 45 minutes.<sup>33</sup>

The map below represents the rail and rapid transit network which is a main element of the vision for transport in the WMCA area for 2035.

### Metropolitan Rail and Rapid Transit Network Map



<sup>32</sup> The key strategic centres chosen were key centres chosen were: Birmingham, Birmingham Airport / NEC (& HS2), Brierley Hill, Coventry, Dudley, Solihull, Sutton Coldfield, Walsall, West Bromwich and Wolverhampton.

<sup>33</sup> This data was kindly provided by Transport for West Midlands (TfWM)

## Environmental Developments

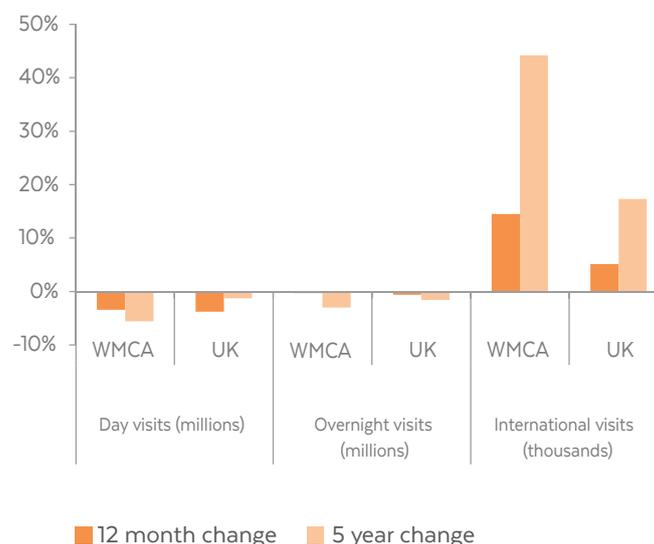
- Continued progress made by the Birmingham & Black Country Nature Improvement Area (NIA) has seen the development of the new NIA Ecological Strategy 2017 - 2022.
- The strategy is based on a robust ecological network which defines core, linking and ecological opportunity areas to provide a basis for targeted intervention to protect, enhance and create sites helping to increase wildlife and biodiversity within the Black Country.
- By using this comprehensive landscape-scale approach it sets a vision for our region, and continues the momentum which has been made to date by the NIA including 250 sites improved for nature; 60 partner organisations involved and **45,000** volunteer hours.

## WMCA Visitor Economy

### Visits

- In 2015 the WMCA attracted **65 million** day visits, accounting for more than **90%** of all visitors to the area. Between 2011 and 2015, the number of day visits increased by **5.6%** from **61 million**. A **six million** decline from the peak in 2014. Although there has been a **3.4%** decrease over the last 12 months (2014 - 2015) in line with national trends and the WMCA has out-performed the UK as a whole.
- Overnight visits to the WMCA have grown at a slower rate than that of day visits - increasing by **0.3%** over the past 5 years but still out-performing the UK which has decreased by **-1.6%** for the same period.
- In contrast, the WMCA has seen significant growth in numbers of international visits - with numbers increasing by **14.5%** over the last 12 months (2014-2015) and **44.2%** over the last 5 years, from **1.02 million** in 2011 to **1.47 million** in 2015. The national picture also shows significant growth, but not as rapid as in the WMCA, with numbers of international visits to the UK increasing by **17.3%** between 2011 and 2015.

Percentage change in the number of visits to the WMCA compared to the UK



## Expenditure

- Total day visitor expenditure has grown by **10.3%** in the WMCA over the past 12 months - from **£2.4 billion** to **£2.6 billion**. The WMCA five year growth is **66.4%** - far exceeding the average growth rate for the UK which grew by **3.5%**.
- Total overnight visitor expenditure has grown by **3.5%** in the WMCA over the past 12 months - from **£7.9 billion** to **£8.2 billion**; also well above the **0.1%** growth rate across the UK.

## Employment

- There has been significant growth in visitor economy employment numbers across all 3 LEP areas and the WMCA over the past five years (2010-2015). The strongest growth has been seen in the Greater Birmingham and Solihull LEP with over **19,000** new employees since 2010 - an increase of **25.51%**. Across the WMCA as a whole the visitor economy sector now employs over **173,000 - 25,628** more than it did five years ago.<sup>34</sup>

## Business numbers

- The visitor economy has also seen strong growth in business numbers. Growth has been highest in the Greater Birmingham and Solihull LEP at **14.1%**. The WMCA is home to over **2,000** more visitor economy businesses in 2016 than in 2011, an increase of **13.9%**.<sup>35</sup>

<sup>34</sup> Source: ONS (2016) Business Register & Employment Survey 2015

<sup>35</sup> Source: ONS (2017) Business Counts

## The WMCA Performance Management Framework<sup>36</sup>

Outcomes	Measures of Success	Where we are now	Change over the last year	Direction of Travel Relative to UK average since 2013	Scale of the Challenge
<b>ECONOMIC GROWTH - Improve GVA for the region in line with the UK average</b>	O1. GVA per Head	£21,537	+£442	+£1,400 +7.0% WMCA <sup>37</sup> +5.8% UK	+£4,064 GVA per head
<b>BUSINESS - Improve the productivity of our businesses focusing on our growth sectors</b>	B1. GVA per employee	£43,706	+£28	+£2,781 +6.8% WMCA +2.4% UK	+£19,832 GVA per employee
	B2. GVA in transformational sectors	£71.3bn	+£2.4bn	+£6.2bn +9.6% WMCA +7.4% UK	+£40.7bn GVA
	B3. No. of Business Births	22,430 business births  55 per 10,000 population	+3,485 business births  +18.4% WMCA +9.3% UK	+3,625 business births  +19.3% WMCA +10.6% UK	59 per 10,000 population  +1,468 births per annum
	B4. Jobs in Transformational Sectors	1.27m	+55,000 jobs	+82,000 jobs +6.9% WMCA +5.9% UK	+194,400 jobs
	B5. Total Jobs	2m	+54,200 jobs	+95,000 Jobs +5.0% WMCA +4.9% UK	+400,000 Jobs
	B6. Employment Rate	68.8%	+0.4pp	+1.5pp WMCA +2.7pp UK	73.9%
<b>FISCAL - Secure better for less from our public services</b>	F1. Income & Exp. Balance	-£4.5bn	+£0.6bn	+£0.6bn <sup>39</sup> +15.4%	+5.1pp No fiscal gap +£4.5bn
<b>PEOPLE - Improve Life Chances for all</b>	P1 – Reduce % of people in top 10% most deprived areas	20%	+0.02pp	+0.09pp WMCA + 0.05pp Eng.	10% of people
	P2 – Better employment, health and wider outcomes for people with complex needs	To be developed			
	P3. (i) Annual average earnings	£27,151	+5.1%	+4.9% WMCA +4.5% UK	+£1,062
	(ii) % of employees earning above UK living wage	To be developed			

<sup>36</sup> The green shading illustrates indicators which have moved in a positive direction compared to the UK average or national (England) where UK averages are not available. The red shading indicates the reverse and orange indicates a growth rate in the right direction but less than the UK or national average.

<sup>37</sup> The 2013 baseline figure was revised by the ONS from £19,423 to £20,137

<sup>38</sup> The star symbol indicates that the current direction of travel and growth rate is on track to meet the 2030 target.

<sup>39</sup> Baseline data is 2015.

Outcomes	Measures of Success	Where we are now	Change over the last year	Direction of Travel Relative to UK average since 2013	Scale of the Challenge
<b>SKILLS - Improve skill levels at all ages so that people have the skills and qualifications to access jobs</b>	P4. % of Working Age Population (WAP) with No Qualifications	13% 329,400 people	-1.5 pp -36,200 people	-33,800 people -1.6 pp WMCA -1.3pp UK	- 4.7 pp - 119,867 people
	P5. % of WAP with NVQ 1	12 % 302,600 people	+0.1 pp + 3,700 people	-9,200 people -0.5 pp WMCA -0.9pp UK	Ahead of UK + 1 pp + 24,905 people
	P6. % of WAP with NVQ 2	16.8% 423,300 people	+ 0.2 pp + 5,200 people	- 7,300 people - 0.5 pp WMCA +0.9pp UK	Ahead of UK + 0.9 pp +21,905 people
	P7. % of WAP with NVQ 3	16.3% 410,400 people	- 0.3pp - 8,700 people	- 25,600 people -1.2 pp WMCA +0.1pp UK	+ 0.8 pp +21,290 people
	P8. % of WAP with NVQ 4+	30.4% 774,300 people	+ 0.03pp + 7,700 people	+86,500 people +2.8 pp WMCA +3.1 pp UK	+7.6 pp +185,010 people
	P9. No. of Apprenticeships starts	42,040	- 1,190 - 2.8%	+ 6,030 +16.7% WMCA +15.9% Eng.	+42,219 per annum
	P10. % of schools with an above national average GCSE pass rate A* - C including Maths and English	46%	48.5% -2.5pp WM Met	52.6% -6.6pp WM Met -4.1pp Eng. <sup>40</sup>	+ 7.5% schools
	P11. NEETs aged 16 - 18	4,420 4.4%	-1,450 -24.7%	-1,950 -30.5% WMCA -19.9% Eng.	4.2% -228 NEETs
<b>HEALTH - Better quality of life for all: improve health (inc. Mental health) and well being</b>	P12. Healthy Life Expectancy (HLE) at Births - Males & Females	Males (M) = 59.3 years	-0.03 years	-0.6 WM Met +0.2 Eng.	63.4 years
		Females (F) = 60.9 years	+0.5 years	-0.3 years WM Met +0.2 years Eng.	64.1 years
	P13. Reduced Inequality in HLE for Males & Females	To be developed			
	P14. Health inequality gap by years between best and worse areas in LEP and SEP areas	M = 7.4 years F = 9 years (WM Met)	M = +1.2 F = - 0.9	M = +1.3 F = - 1.3	No gap Reduce gap by 7.4 years for males and 9 years for females
	P15. Gap in employment rate for those in contact with secondary mental health services and the overall employment rate	58.9 %	-0.6pp	+1.5pp WMCA +5pp Eng.	Ahead of England + 8.3pp (67.2%)
	P16 - Rates of suicide (per 100,000)	10.1	+0.4	+1.8 WMCA +0.3 Eng.	No suicides - 410 suicides
	P17 - % of physically inactive adults	24.8%			22% + 90,524 participants <sup>41</sup>
P18 - Offending rates	32,008 7.9 offenders per 1,000 population (2014)	-1,364 - 4.1%	-7,170 - 7.6% <sup>42</sup>	Below the national average	

<sup>40</sup> Relative to Schools with GCSE pass rates above the national average (England).

<sup>41</sup> No previous data available as first Active Lives Survey was issued in 2017.

<sup>42</sup> Baseline is 2011.

Outcomes	Measures of Success	Where we are now	Change over the last year	Direction of Travel Relative to UK average since 2013	Scale of the Challenge
<b>CRIME - Reduce offending and re-offending</b>	P19 - Re-offending rates (per 100,000)	24.9% (2014)	+0.3pp	-0.1pp WMCA -1.2pp Eng. <sup>43</sup>	Ahead of England + 0.5pp
	P20 - No. of first time entrants to Youth Justice System aged 10 - 17	454	+3.3%	-8.2% WM Met -17.6% Eng.	-85 first-time entrants
	P21. Youth claimants aged 18 - 24	14,805	+1,515 +11.4%	-11,240 -43.2% WMCA -46.4% UK	-32% -4,781 youth claimants
	P22. Claimant Count aged 18 - 64	67,705	+5,085 +8.1%	-35,755 -34.6% WMCA -37.5% UK	- 27% - 16,957 claimants
<b>PLACE ACCESSIBILITY- Improve the connectivity of people to businesses to jobs and markets</b>	PL1. Broadband Connectivity	93.7% 1.13m premises	+2.3pp	+2.4pp WM Met +14pp UK <sup>44</sup>	100% +75,793 premises
	PL2. % of residents able to access 3 or more strategic centres including Birmingham City Centre, accessible by public transport within 45 mins travel time in the am peak	41% (WM Met)	-1.3pp	-3.2pp	75% +34pp
	PL3. Journey time reliability	To be developed <sup>45</sup>			
	PL4. Mode Share of all Journeys: i). Mode Share of all journeys by car, public transport, cycling & walking ii). Percentage of car journeys non-single occupancy	i) Car (64%) Public Transport (11%) Walk (22%) Cycle (1%) Taxi (2%) ii) 82%		i) Car +1% Public Transport -2% Walk No change Cycle No change Taxi +1% i) No change	45% car mode share Car (- 19%)
<b>INFRASTRUCTURE - Improve the quantity of high quality readily available development sites</b>	PL5. No./ha available for housing developments	To be developed			
	PL6. No./ha available for employment development sites	To be developed			
	PL7. Land Uplift value	To be developed			
<b>SUSTAINABILITY - Resource efficient economy to stimulate new technology and business</b>	E1. CO <sub>2</sub> emitted within SEP area by transport, businesses and homes	21,564ktCO <sub>2</sub> (2014)	- 167 ktCO <sub>2</sub> - 0.8%	+ 1.6% WMCA <sup>46</sup> -6.3% UK	- 7,681 ktCO <sub>2</sub>
	E2. No. of days poor air quality per year (rated 4 or higher on the Daily Air Quality Index)	40 days	+ 12 days	- 16 days WMCA -11 days UK	-40 days

<sup>43</sup> Baseline is 2011.<sup>44</sup> Baseline is 2011.<sup>45</sup> Transport for West Midlands is in the process of developing an effective monitoring approach for journey time reliability.<sup>46</sup> Baseline is 2011.

