THE BLACK COUNTRY STUDY

‘The Future of The Black Country’
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THE BLACK COUNTRY STUDY
TECHNICAL EXECUTIVE SUMMARY

THE BLACK COUNTRY STUDY

The Black Country Study is the Urban Renaissance Strategy for the Black Country. It sets out:

- **WHY** the Black Country needs to change;
- **WHAT** needs to be done – the strategic direction and scale of change;
- **WHERE** that change is going to take place – the spatial strategy for the Black Country;
- **HOW** that change will be brought about – the delivery strategy.

The Study began three years ago. The Black Country’s political and business leaders recognised the need to consider radical change in the Black Country to counter the processes of decline of the last 30 years. In parallel, the West Midlands Regional Spatial Strategy (RSS) placed a stronger emphasis on urban renaissance. Specifically, in approving the RSS (then known as Regional Planning Guidance) in 2004, the Secretary of State called for an early review of certain aspects of the Strategy, including the need to address the many inter-connected issues facing the Black Country. The Study identifies a sub-regional strategy for the Black Country setting out the priorities for regenerating its physical, environmental, social and economic fabric and has been prepared by the Black Country Consortium (the Black Country strategic public/private partnership). The Consortium has also led the preparation of the draft RSS Phase One Revision: The Black Country on behalf of the West Midlands Regional Assembly. The Assembly, as Regional Planning Body have accepted the Study as supporting document for the draft RSS Phase One Revision.

Although non-statutory (it will not form part of a Development Plan), the Study will provide evidence for the formulation of a Joint Black Country Core Strategy by the four Black Country Local Planning Authorities. It is intended to be an operational tool for a range of agencies to drive physical, social, environmental and economic transformation collectively in the Black Country over the next 25 years.
During the last two years, the Consortium has made an important contribution to the emerging proposals for the City Region, which spans the area between Telford and Coventry. The Study sets out the Black Country’s initial contribution to City Region growth and competitiveness to 2031.

The Black Country Study process began by agreeing a **30-year Vision** with partners, setting a highly ambitious and bold agenda for change. This Vision provides the driving force for change. A portfolio of technical evidence has been developed to test the interventions needed to turn the Vision into reality. The Delivery Plan will provide a framework for implementing initiatives on the ground in an integrated and seamless manner. **This report is a technical executive summary of the Black Country Study ‘The Future of The Black Country’**.
THE BLACK COUNTRY TODAY

Today, the Black Country is a vibrant, welcoming multi-cultural society with a population of almost 1.1 million. The sub-region comprises the City of Wolverhampton and the Metropolitan Boroughs of Dudley, Sandwell and Walsall (Map 1: The Black Country Authorities). As a centre of cultural diversity it is home to more people of Black, Minority and Ethnic (BME) origins (15.2% of total population) compared to the national average (9%). While the Black Country is a distinctive sub-region, it is also an integral part of a City Region of 2.75 million, centred on Birmingham. (Map 2: The Black Country in the City Region).

The Black Country is one of only three sub-regions in the UK experiencing net population decline. Since 1990, population has fallen by over 20,000 and net out-migration has approached 4,000 people per annum.

Although the area has many social and economic strengths, the local economy performs poorly compared to similar sized sub-regions elsewhere in the UK. While retaining a strong manufacturing sector supporting 22% of total employment, it has failed to sufficiently attract new knowledge-based industries that are driving economic growth elsewhere in the UK.

The area has fewer highly skilled, high earning people living and working in the sub-region and some of the most severe concentrations of deprivation. As a consequence, a £2.6 billion output gap with the rest of the UK has emerged and there are some 100,000 fewer jobs today than in the 1970s.

The legacy of the Black Country’s industrial past continues to dominate the image of the Black Country, masking community strengths, the natural topography, green spaces and water features. From the air, open spaces stand out – along valleys, railway lines, canals and hills – but on the ground many are inaccessible or poorly maintained. The poor quality of the urban environment undermines efforts to attract knowledge industries and their employees to the area. The extent and pattern of congestion on key roads through the Black Country further degrades the environment, undermines public transport services, and imposes severe costs on companies operating in the area.

For knowledge workers, there is a lack of choice in the housing market. The Black Country is dominated by uniform concentrations of relatively low priced private housing and very substantial concentrations of social rented
housing. For knowledge industries, there are few high quality sites providing good access to transport infrastructure and a pool of highly skilled labour. Meanwhile, the town centres are not the hubs of economic activity needed, with significant leakage of retail expenditure to Birmingham and other surrounding centres.

If current trends continue, employment in the Black Country will decline further, the income gap with the rest of the UK will widen, net out migration will persist, and population will further decline. “Business as usual” is not an acceptable option for the future of the Black Country.

Map 1
Map 2

The Black Country in the City Region
THE VISION

The Black Country Study began by agreeing a unified 30-year Vision with over 150 civic and business leaders, community representatives, educationalists and the voice of young people. The Vision sets an ambitious and bold agenda for change:

"By 2033, we aim to make the Black Country a confident ‘we can do it’ place, where our skills, work ethic and diversity are key to our prosperity. The Black Country will be made up of a polycentric network of four centres – Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill - each offering a distinct, wide range of shopping, leisure and cultural facilities, office employment and housing. A transport revolution will have taken place with our bus, Metro, rail and road networks making it easy to move around the Black Country, into Birmingham and the rest of the City Region.

Our manufacturing companies will be prospering, at the cutting edge of technological innovation but our high quality environment – not our industrial legacy – will dominate the urban landscape. Our canal system, linking our communities together, means we are known as Britain’s Venice. All Black Country citizens will have a deep sense of belonging and will be enabled to contribute actively to the social, economic and physical well being of the area. The Black Country will be genuinely inclusive and integrated in residential, economic, social and educational terms."

Flowing from the Vision, four headline objectives have been set to 2031 to drive the Black Country Study:

By 2031:

**Reverse net out-migration** and grow population to 1.2 million;

Raise income levels to 90% of the UK average from 81% today;

**Accommodate a more balanced population**; achieving parity with the national social grade profile; and

Create high quality, sustainable environments.
THE PREFERRED STRATEGY

The strategy to deliver the Vision entails making significant investments in the economy, town centres, housing, education, the environment and transport to harness the strengths of the diverse communities. If nothing is done, trend-based forecasts predict a widening of the gap between the Black Country and more prosperous UK regions.

The elements of the Strategy are linked to each other. For example, attracting investment in knowledge based industries entails improving the choice and quality of housing. Stemming the loss of retail expenditure (and the consequent loss of jobs) from the Black Country entails making the town centres attractive places to shop, to work, and to live. At the same time, all these results are dependent on improving transport across the Black Country to make it easier to gain access to town centres and jobs (by bus, metro, rail and by car) and for commerce to gain more reliable and speedy access to the national motorway and trunk road network.

KEY GROWTH PROGRAMMES

1. ACCELERATING GROWTH OF THE KNOWLEDGE ECONOMY

A modern economy, generating high value-added jobs, is the first key to the prosperity of the Black Country. The area must move from a relatively low skilled, low wage economy to a high skilled, well-paid knowledge economy where both service and high value added manufacturing companies are competing successfully in the global economy. This includes accelerating the rates of business start-ups and survival.

The Black Country Economic Strategy - through its three key strands of attracting and retaining value-added businesses; embracing and connecting the Black Country to the knowledge economy (education, skills and managerial enhancement); and creating the right spaces and connectivity for business - aims to address the Black Country’s current £2.6bn output gap with the rest of England. It also sets the aspiration to make income levels equivalent to the rest of the country by 2031 (excluding London and the South East).

The Economic Strategy highlights the underpinning importance of raising education and skills performance and transforming the Black Country environment to grow, attract and retain knowledge-based population and businesses.
Implementing the Black Country Economic Strategy will make a major contribution to the achievement of City Region growth and competitiveness, turning a current City Region output gap into a positive contribution to the regional and national economy. The **Black Country Incubation Strategy** is a key component of the Black Country Economic Strategy to develop entrepreneurial activity within the local population, business and academic communities. Connectivity to the city region, regional, national and international knowledge and research institutions will expand the knowledge base, supported by the creation of environments for technology-led businesses to grow.

There are significant opportunities for growth in financial and business services, high value logistics, and high technology manufacturing in the Black Country. As many as 160,000 new jobs (gross) will be required in these sectors over the next 30 years. To achieve this, a major overhaul of the land use and transport structure is required to create **modern, fit for purpose, employment sites**.

There is a need to retain 2,200 ha of employment land, of which at least 1,600 ha must be transformed into competitive high quality, well-serviced and accessible sites required by knowledge-based business.

Where will the Black Country’s new companies locate? First, the strategy proposes **four corridors** for the location of high quality employment sites most suited for knowledge-based business, advanced manufacturing, incubation and innovation. These are illustrated in the main report. Most of the sites in these corridors will benefit from fast and efficient access to the motorway network, a core requirement for logistics companies.

**The four proposed Employment Land Investment Corridors are (Map 3: Employment Land Corridors and Strategic Centres):**

<table>
<thead>
<tr>
<th>Corridor</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Black Country North:</strong></td>
<td>Wolverhampton Centre – Stafford Road Corridor (incorporating Wolverhampton Science Park and Wobaston Rd i54/MIS).</td>
</tr>
<tr>
<td><strong>Black Country Central:</strong></td>
<td>Walsall Centre – Darlaston – Wednesbury Corridor (incorporating Darlaston SDA, Hill Top, the Black Country Route, and Wednesfield Way, Wolverhampton).</td>
</tr>
<tr>
<td><strong>Black Country West:</strong></td>
<td>Pensnett – Brierley Hill Centre – Dudley Town Centre – Dudley Port Corridor (incorporating Pensnett Estate).</td>
</tr>
<tr>
<td><strong>Black Country East:</strong></td>
<td>Oldbury – West Bromwich Corridor (incorporating M5 Junctions 1 and 2 and Sandwell &amp; Dudley Station).</td>
</tr>
</tbody>
</table>
It is proposed that within these employment land corridors, **Technology Parks** will provide high profile, quality, environments and premises for the incubation and growth of knowledge-based businesses.

Second, and of particular significance, the **growth of office based companies will be focused in town and city centres**. This will be critical to providing the scale and diversity of new jobs to meet the needs of the Black Country’s growing population and contribute to transformational development of the key Centres driving renaissance.
2. **EXPANDING THE FOUR STRATEGIC TOWN AND CITY CENTRES**

Vibrant town and city centres are the second key to the prosperity of the Black Country. They must provide a full range of shopping alongside exciting cultural attractions and leisure facilities. They should provide high quality office space for knowledge-based companies and new homes for ‘city living.’ The four centres with the greatest capacity for growth are: **Wolverhampton, Brierley Hill/Merry Hill, West Bromwich and Walsall. (Map 3)**

While still an important centre for the Black Country, Dudley Town Centre cannot expand as a retail centre without damaging the local heritage and environment. Thus, in future, Dudley will become a key location for housing and tourism. In contrast, **Brierley Hill/Merry Hill** has become one of the most important retail and office locations in the sub-region. Further expansion will act as a significant catalyst for growth, and it should therefore, be recognised as a strategic centre and for regeneration in the Black Country, replacing Dudley Town Centre in the Region’s network of strategic centres.

All four strategic centres will need to expand beyond their current boundaries. With respect to **office space**, **1.3m sq.m of net additional space** is needed by 2031 (745,000 sq m by 2021) to accommodate service sector job growth and consolidate the role of these key centres.

In terms of retail capacity, the target is to create a further **284,000 sq m gross of comparison floor space** in the four key centres by 2031 (185,000 sq m gross by 2021). An additional allowance has been made for accommodating retail growth in smaller district centres to meet local need and to maintain their vitality and viability.

The expanded Strategic Centres have the capacity to accommodate 77,000 more jobs and 7,700 more homes to 2031 in highly sustainable locations.

The four strategic centres are priority locations for immediate investment. As the places that local people identify with the most, they will be where the transformation of the Black Country is most visible. Masterplans for those centres will be building blocks for the Delivery Plan.

3. **BUILDING QUALITY HOUSING—OFFERING MORE CHOICE**

Improving the quality and widening the choice of housing across the Black Country is the third key to future prosperity. Today the housing market does not adequately meet the needs of many residents of the Black
Executive Summary

Much of the social housing and some privately owned housing is below the Government’s Decent Homes standard. The overall environment in many neighbourhoods is unattractive. As a result, for many years, households have chosen to move away to areas beyond the Black Country; this is the main reason why the population of the Black Country is declining. The strategy will reverse this trend, transforming historic ‘push’ factors into positive ‘pull’ factors. This will involve accelerating the rate of house building and housing stock renewal, and ensuring that every community provides a wider choice of better quality housing.

New households have been forming in the Black Country faster than new houses are being built. The strategy will therefore increase house building at a minimum of 3,600 new homes per annum from 2011 to 2021 (and a continuation at this rate to 2031.) The housing strategy assumes that some 790 homes per annum will be demolished as part of the creation of new residential environments. Overall, this will lead to an increase of some 71,000 additional dwellings by 2031 (+44,000 by 2021) supporting a population increase of some 125,000 people by 2031 (+60,000 people by 2021).

Achieving this scale of housing growth will require a significant change in the pattern of land use. In particular, old and underused industrial areas will need to be redeveloped to create new housing environments. It is estimated that up to 1,700 ha of currently designated employment land will need to be converted to residential use by 2031 and 1,100 ha by 2021.

This higher rate of house building will assist with the creation of stronger mixed, sustainable communities across the Black Country. It is essential that the new residential areas should offer a more diverse range of housing types and densities. In particular, more quality mid-market and upper market homes for middle and higher income households are essential. Currently such households are more inclined, and able to, leave the Black Country to find homes elsewhere.

A significant proportion of the housing growth in the Black Country will take place in public transport corridors with concentrations within walking/cycling distance of railway stations, Metro stops and existing local centres. Much of the land for housing growth (75%) will come from the restructuring of former poor quality employment land for residential led mixed development. Residential growth in corridors will be focused along existing railway lines; along the existing and planned Metro network (connecting the Strategic Centres in the Black Country, and with Birmingham); and in corridors where the Employment Land Capacity Study
has identified that there is potential for restructuring older employment land for new residential-led mixed use environments. The potential corridors to accommodate housing growth are illustrated in (Map 4: Housing Strategy to 2031).

Housing market studies have also identified the need to prepare a major programme of progressive housing renewal to raise the quality of homes and residential environments across the Black Country. Many of the lowest quality homes are in the most deprived core of the Black Country, situated within monolithic, often isolated, former council estates. They form a large ‘X’ shaped mass covering half of the Black Country extending from north of Wolverhampton City Centre through West Bromwich to Smethwick and from Brownhills through Walsall to Dudley. A further zone of housing market weakness can be identified in the north of the sub-region in Wolverhampton and Walsall.
Many BME communities are housed in older mixed residential and industrial areas around town centres. These localities are popular as they are well served by public transport and provide a rich concentration of community facilities. However, they offer poor quality housing with limited choice and overcrowding.
In addition to the existing Sandwell-Birmingham Housing Market Renewal Area in the east of the Black Country ('Urban Living'), four further zones have been identified in the north and centre of the Black Country where interventions are essential (Map 4). These areas will require programmes of progressive renewal with sensitive implementation, combining housing improvement with selective demolition and restructuring of the local environment. It will be essential to work closely with existing communities to ensure that their housing needs are met. Many of the neighbourhoods in need of housing market renewal also coincide with the potential housing growth corridors that studies have identified. This creates exciting opportunities for combining growth and renewal, where development can be phased to create new residential environments that are attractive to a more diverse range of households, especially high earners.

Retaining and attracting more skilled, higher income households is vital to the achievement of the Black Country Vision. The Economic Study suggests that 50,000 more higher earning/higher skilled households will need to choose to live in the Black Country by 2031 if the Consortium’s aspiration to close the income gap is to be realised.

4. CREATING A WORKFORCE FOR THE 21ST CENTURY

A more diverse, knowledge-intensive economy will only be achieved across the Black Country if the adult workforce - and young people entering the workforce – are able to acquire additional skills. This is a pre-requisite for Black Country companies to compete effectively in the global economy. The Economic Strategy indicates that to be competitive the Black Country economy requires 100,000 more skilled workers and 60,000 more with qualifications of at least degree standard by 2031.

Detailed joint proposals in the Black Country-wide Education and Skills Plan show how the skill levels of the adult workforce and young people will be raised. In terms of immediate action, prioritising investment in colleges will make sure that training truly responds to the skill needs of employers. The University of Wolverhampton is now playing a lead role in working with schools across the Black Country to boost attainment at secondary schools – as well as providing learning opportunities for all.

The Education and Skills Plan covers all phases of learning. It includes:

1) ‘Enjoy and Achieve’, setting out priorities for early years
2) ‘Every Adult and Business Matters’ covering adult learning and how learning in the Black Country will be more demand-led.

In addition, Research & Development is being boosted in the University, in Colleges, and in businesses. These go hand-in-hand with efforts to widen housing choice, and improve the environment. Together, these will ensure that communities across the Black Country attract, and retain skilled workers, in a wide range of industries.

5. CREATING PROSPEROUS, DIVERSE AND HARMONIOUS COMMUNITIES

Black Country-wide efforts to enable participation in social and economic life and to build more cohesive communities are fundamental to the overall strategy. Ethnic, cultural and religious diversity is one of the main strengths of the Black Country today, providing some of the most enterprising communities. Yet these strengths will only be harnessed through addressing structural inequalities that now exist in Black Country communities.

These inequalities constrain efforts to boost educational attainment, widen housing choice, provide routes into the labour market for those out of work, and reduce crime and fear of crime. They constrain the opportunities for anyone living in a deprived community including - but by no means limited to - members of black and minority ethnic groups. As part of the Delivery Plan, the Black Country Consortium proposes exploring with Government the establishment of a new partnership to define specific actions to overcome these structural inequalities.

The approach will be to treat diversity as a major opportunity; this will be reflected in all elements of the Black Country Study. The Study promotes social cohesion as a theme in its own right directly addressing the barriers to equality in education, labour and housing markets, health, policing, and the criminal justice system. Poverty will also be tackled as a theme in its own right, approached from the perspective of individual communities across the Black Country not just within BME communities.
6. **TRANSFORMING THE ENVIRONMENT: ‘BLACK COUNTRY AS AN URBAN PARK’**

Establishing the ‘Black Country as an Urban Park’ is the programme to transform both the built and open space environment across the sub-region and establish the highest possible design standards for future development in the Black Country. The Black Country will become a national exemplar for urban living and sustainable urban renaissance. It will make a major contribution to achieving national environmental targets such as reducing carbon emissions. Both the Economic and Housing Studies have stressed that a transformed environment is a pre-requisite for creating a more competitive Black Country.

The sub-region has many environmental assets including its canals, geology, wildlife and open spaces, but too many are hidden, inaccessible or not celebrated. More needs to be made of these assets. Establishing the ‘Black Country as an Urban Park’ shows how to do this, based on three principles.

First, **beacons** will highlight the most distinctive characteristics of the Black Country; these might include physical objects such as sculptures and buildings or flagship events and festivals. Second, **corridors** will facilitate sustainable movement around the Black Country using its environmental assets, including canals, walkways and cycle routes. For instance, 177kms of canals and associated architecture form a tremendous asset for underpinning new residential and business environments and providing corridors of sustainable movement of people and possibly goods. Third, the environment within **communities** will be enhanced – emphasising past and future community areas by their distinctive character.

**A Black Country Landscape Action Plan will define the physical form of the Black Country** in accordance with the three ‘Urban Park’ principles. It will provide the framework for driving the transformation of the environment across the Black Country, changing its image and legibility and building on existing natural, built and heritage assets. Implementation of the Landscape Plan will underpin the creation of new residential environments and employment land investment for knowledge industries. **Map 5 (Potential Strategic Landscape Corridors and Beacons)** illustrates key corridors and beacons which the Black Country Landscape Plan will examine as the basis for the proposed Action Plan.
7. **DEVELOPING AN INTEGRATED TRANSPORT NETWORK**

The free flow of people and goods across the Black Country - and between the Black Country and key markets – is key to future prosperity. A new **integrated public transport system** is needed to create a functioning polycentric network of centres with easy journeys to work, to learn, and to shop. The ‘**Black Country Express**’ will revolutionise the way people travel between centres and outside the Black Country, by providing integrated bus, Metro and rail services. One of the flagship projects will be an extended Metro service, linking the Black Country’s communities together and to Birmingham.

The core objective of the **Transport Strategy** is to unlock economic growth. It will do so by prioritising investments that support the growth of **centres**, and **land use transformation** to create new accessible housing and business locations. As well as public transport investments (particularly the Metro network), it includes highway and junction improvements to the existing road network and motorway junctions and provision for new roads and junctions that will unlock growth.

Key investments are needed to improve the Black Country’s **external connections** to UK, European and Global markets. For example, to ensure fast and reliable access to Birmingham International Airport, the City Region and the rest of the UK, major capacity enhancements of the mainline railway from Wolverhampton to Birmingham and beyond will be essential. New Street Station in Birmingham is a critical economic driver and therefore improvements to this station are vital to the Black Country’s future.

The **Transport Strategy** focuses on supporting the Black Country Study’s investment priorities. It builds on and extends the Local Transport Plan Package by:

- Connecting up the four strategic centres by public transport (notably through the completion of the Metro network) to create a polycentric network of centres where there is a real alternative to the motorcar;

- Providing communities with access to employment, leisure, education and health opportunities, again focusing on public transport improvements;

- Facilitating access to quality employment land with reliable access to the national motorway network, especially for freight (within 5-10 minutes);
Executive Summary

- Focusing investment in public transport and road network improvements within identified corridors to improve accessibility for knowledge workers;

- Improving access for more of the Black Country to Birmingham International Airport; and

- Considering the role of demand management as an ongoing priority in the development of the Phase II Revision of the Regional Spatial Strategy.

*Map 6 (Preferred Transport Networks 2031)* sets out the key elements of the Transport Package and their relationships to the Black Country investment priorities for economic and household growth.
Map 6 Black Country Study: Preferred Transport Networks 2031

Black Country Study

See it in colour

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Executive Summary
SUMMARY OF THE PREFERRED SPATIAL STRATEGY

In summary the proposed Spatial Strategy to achieve growth and competitiveness in the Black Country to 2031 focuses development on centres and corridors.

The transformation of the Black Country will be led by the development of its four strategic centres (Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill). Four Employment Land Investment Corridors (Enterprise Black Country North, Central, West and East) will provide much of the quality employment land required for future knowledge based business. Housing growth will be focused on public transport corridors (served by rail, Metro and quality bus services), supported by environmental improvements in landscape corridors, notably along canals. Other centres will be supported to meet the needs of local communities with promotion of walking and cycling accessibility.

The Spatial Strategy requires major land use and environmental transformation of the Black Country. It proposes 100% brownfield land development and aims to protect the existing Green Belt.

The transformation proposed requires the provision of a coherent, integrated and efficient transport network based on greatly improved public transport network – ‘Black Country Express’ - (with Metro as a key component) and enhanced accessibility to strategic centres and employment land.

It provides for the accommodation of population and economic growth of 44,000 households and up to 65,000 jobs to 2021, with potential further growth of 27,000 households and 30,000 jobs to 2031.

Table 1 (Preferred Spatial Strategy: Scale of Growth) summarises the potential growth in housing, jobs, office and retail floorspace which the proposed Preferred Spatial Strategy could accommodate, subject to detailed planning. This is the broad distribution and magnitude of change which will form the framework for the preparation of the Black Country Study Delivery Plan.
### Table 1. Preferred Spatial Strategy: Scale of Growth

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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td><strong>NEW HOMES:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Strategic Centres</td>
<td>5,500</td>
<td>7,700</td>
</tr>
<tr>
<td>Public Transport Corridors</td>
<td>30,100</td>
<td>53,900</td>
</tr>
<tr>
<td>Other (e.g. commitments, intensification)</td>
<td>8,500</td>
<td>10,100</td>
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<tr>
<td><strong>Total New Homes</strong></td>
<td><strong>44,100</strong></td>
<td><strong>71,700</strong></td>
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**Additional A/B households to be accommodated**  
32,000  
50,000

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<th>2001 to 2031</th>
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<tr>
<td><strong>EMPLOYMENT:</strong></td>
<td></td>
<td></td>
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<tr>
<td>New Jobs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Centres</td>
<td>45,500</td>
<td>76,700</td>
</tr>
<tr>
<td>Employment Land Investment Corridors</td>
<td>*21,700</td>
<td>*49,800</td>
</tr>
<tr>
<td>Other (Local Centres, Off-Centre Commitments, Employment Opportunity Areas)</td>
<td>12,800</td>
<td>34,300</td>
</tr>
<tr>
<td><strong>Total New Jobs</strong></td>
<td><strong>80,000</strong></td>
<td><strong>160,800</strong></td>
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* includes 7,000 planned commitments on periphery

** Net new jobs accommodated after allowing for manufacturing restructuring  
65,000  
95,000

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<tr>
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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td><strong>LAND IMPLICATIONS:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Transfer of Employment Land to Residential led Mixed Use</td>
<td>-1,100ha</td>
<td>-1,700ha</td>
</tr>
<tr>
<td>Retained Employment Land</td>
<td>2,800ha</td>
<td>2,200ha</td>
</tr>
<tr>
<td>Provision of High Quality Employment Land</td>
<td>1,000ha</td>
<td>1,600ha</td>
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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td><strong>NEW FLOORSPACE BUILT:</strong></td>
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<tr>
<td><strong>Offices:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Strategic Centres</td>
<td>0.75m m²</td>
<td>1.30m m²</td>
</tr>
<tr>
<td>Other (incl commitments)</td>
<td>0.12m m²</td>
<td>0.15m m²</td>
</tr>
<tr>
<td><strong>Total Offices (B1a &amp; A2):</strong></td>
<td><strong>0.87m m²</strong></td>
<td><strong>1.45m m²</strong></td>
</tr>
<tr>
<td><strong>Retail:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Strategic Centres</td>
<td>0.19m m²</td>
<td>0.28m m²</td>
</tr>
<tr>
<td>Other Centres</td>
<td>0.05m m²</td>
<td>0.10m m²</td>
</tr>
<tr>
<td><strong>Total Retail (A1):</strong></td>
<td><strong>0.24m m²</strong></td>
<td><strong>0.38m m²</strong></td>
</tr>
</tbody>
</table>
NEXT STEPS

The main next steps are as follows:

First, the Consortium is leading efforts with partners to prepare a comprehensive Delivery Plan. This will highlight the key projects which will be undertaken by the private sector, local authorities, Centro, Advantage West Midlands, English Partnerships, the two Urban Regeneration Companies, and other delivery bodies. A detailed five-year programme, and an indicative ten-year programme are now being prepared towards an overall 25 year transformational development strategy.

Second, the results from the Black Country Study are being incorporated in the draft Regional Spatial Strategy (RSS) Phase One Revision. Following formal consultation, this will be subject to an Examination in Public in January 2007. Subject to the outcome of the Examination and approval by the Secretary of State, it is hoped the Revision to RSS will be published as Government policy towards the end of 2007. The Study and the changes in the RSS set the key principles which will be incorporated in the Joint Core Strategy for the four Local Planning Authorities in the Black County and their respective Local Development Frameworks.

Third, given the importance of boosting educational attainment and improving skills across the Black Country, the detailed Education and Skills Action Plan will set out, year by year, how a competitive workforce will be created.

Adoption of the Black Country Study and the implementation of the proposed Delivery Plan will make a major contribution to growth, competitiveness and quality of life - not only for the communities of the Black Country, but also for the City Region and West Midlands Region as a whole. The Study demonstrates how the radical proposals in the Regional Spatial Strategy to focus growth and development through urban renaissance can be achieved in a complex sub-region, such as the Black Country.
THE BLACK COUNTRY STUDY - PREFACE

THE ONGOING PROCESS

The Black Country Study has been produced by the Black Country Consortium to guide the strategic future of the Black Country. It has a wide range of functions, acting as a framework for the integrated physical, social, economic and environmental programmes that the Consortium, together with other stakeholders, are progressing towards Black Country renaissance.

One of its key roles is as the body of technical evidence substantiating the draft RSS Phase One Revision: The Black Country. The West Midlands Regional Assembly as the Regional Planning Body have recognised this role, including it in its submission of the draft Revision to the Secretary of State at the end of May 2006.

In its role as substantiation for the draft RSS Phase One Revision, there may be additional technical work to add to the Study. For example, prior to its Examination in Public (EiP) the examining Panel may request further evidence which will be incorporated into the Study. This is in order to ensure that such additional evidence is represented to maximum effect as part of the integrated land use – transport – social – economic and environmental action package. As this is completed it will be published on the Black Country Consortium website: www.blackcountryconsortium.co.uk.

Another key role for the Study will be in setting the context for the four Black Country local authorities in producing a Joint Core Strategy as part of their statutory local development frameworks (LDFs).

The Study is a “live” working document. It represents work in progress on the range of initiatives that will feature in the Separate Delivery Plan.

The Study along with the forthcoming Delivery Plan will be available in loose-leaf form to ensure that both documents reflect the most up to date position of action programmes and other corporate initiatives at all times.

SUSTAINABILITY

The RSS Phase One Revision: The Black Country has been subject to a Sustainability Appraisal/Strategic Environmental Assessment. This has been undertaken in an independent manner and as described in Government Guidance. The process has been overseen by a Steering Group led by an independent Chair. The appraisal exercise consisted of a series of workshops led by independent consultants.

The Sustainability Appraisal has been signed off and confirms the acceptability of the package of policy changes as meeting a series of sustainability objectives against which policy performance has been judged.
As the policy revisions have emerged they have been amended to reflect, as far as practicable, the outcomes of the appraisals, and its independent consultants. Early drafts of the Black Country Study have been appraised and commentary and opinion were provided on this supporting document. The appraisal has responded positively to the draft Black Country Study as it substantiates and details the RSS Phase One Revisions.

Outstanding areas of comment are in most cases referring to issues which will be subject of future detailing in the formulation of development plan policies at the local level.

The full Sustainability Appraisal Report is on the web at:

www.blackcountryconsortium.co.uk
A INTRODUCTION

A1 THE BLACK COUNTRY

A1.1 The Black Country is a vibrant, welcoming multi-cultural society with a population of almost 1.1m people, 450,000 homes and 500,000 jobs. It comprises of the City of Wolverhampton and the Metropolitan Boroughs of Dudley, Sandwell and Walsall (Figure A1.1). Its communities led out the Industrial Revolution capitalising on its unique geology. Today it retains important economic activity at the centre of national road, rail and canal networks.
A2 THE BLACK COUNTRY CONSORTIUM

A2.1 Three years ago the Leaders of the four Black Country local authorities – Dudley, Sandwell, Walsall and Wolverhampton – met together with other leading stakeholders and the private sector to begin the process of transforming the Black Country. In recognition of the serious economic and social challenges, the Black Country Consortium (BCC) was given the lead role in setting a new trajectory for regeneration and urban renaissance in the sub-region. A new project was born, ‘The Black Country Study’, setting radical new aspirations for growth and prosperity over the next 30 years.

A2.2 Originally established in 1999 to promote the interests of the four Boroughs, the Consortium became a limited company in 2002 in recognition of its growing importance and new role. Since then, (the Black Country Consortium) have made significant progress, strengthening capacity and developing further collaborative relationships with stakeholders.

A2.3 In addition to the four local authorities, the Board of Directors now includes representatives from the private sector, Local Strategic Partnerships (LSPs), the Learning and Skills Council (LSC), Wolverhampton University, ConneXions, the Primary Care Trusts (PCTs), the Faiths, and Black Country Chamber & Business Link. Other regional, sub-regional and local partners also make vital contributions. Advantage West Midlands and the West Midlands Regional Assembly help to shape BCC work at the regional level. Locally, BCC engage with the voluntary sector, community organisations and young people.
A3 THE BLACK COUNTRY STUDY

A3.1 The Black Country Study is the Urban Renaissance Strategy for the Black Country. It sets out WHY the Black Country needs to change; WHAT needs to be done – the strategic direction and scale of change; WHERE that change is going to take place – the spatial strategy for the Black Country; and HOW that change will be brought about – the delivery strategy.

A3.2 Its purpose has been driven by two complementary prerogatives. The first was the recognition by Black Country leaders, in both the public and private sector, of the need to consider radical change in the Black Country to counter the decline of the last 30 years. The second was the timely shift towards a greater emphasis on urban and rural renaissance in the West Midlands Regional Spatial Strategy (RSS). This prioritised the creation of urban conditions capable of meeting the needs and aspirations of all, and specifically to counter the market trend of net outward migration by higher income groups from urban areas.

A3.3 In approving the RSS (then known as Regional Planning Guidance) in 2004, the Secretary of State called for an early review of certain aspects of the Strategy, including the need to address the many inter-connected issues facing the Black Country. The Study identifies the priorities for regenerating its physical, environmental, social and economic fabric and has been prepared by the Black Country Consortium (the Black Country strategic public/private partnership). The Consortium has also led the preparation of the Draft Phase One Revision: The Black Country on behalf of the West Midlands Regional Assembly. The Assembly, as Regional Planning Body, has accepted the Study as a supporting document for the draft RSS Phase One Revision. In this, and many other ways, the Black Country Study is pioneering a new vision-led approach to urban renaissance in a complex urbanised sub-region. The Study covers four local authorities with a population of over 1 million people and more than 0.5 million jobs.

A3.4 The Black Country Consortium began the Black Country Study process by agreeing a 30-year Vision, setting a highly ambitious and bold agenda for change (see Chapter C1): this Vision is the driving force behind everything BCC do. It translates into four headline objectives:

1. To reverse net out-migration and grow the population of the sub-region.
2. To grow incomes in the Black Country.
3. To achieve a more sustainable socio-economic balance.
4. To transform the Black Country environment.
A3.5 In short, they set an agenda for growth and enhanced competitiveness: by 2031 BCC aims to once again make the Black Country a major contributor to regional and national economic wealth and to ultimately improve quality of life.

A3.6 Key interventions have been tested and articulated which are needed to turn the Vision into reality, backed by a portfolio of compelling technical evidence. This technical evidence has helped to set the strategic direction and framework for a series of Black Country strategies – for the economy, the role of town centres, for education and skills, for housing, for the environment and for transport. It acknowledges that strategies for Culture, Leisure and Diversity and for Healthy Living will also be significant contributors to achieving the Black Country Vision.

A3.7 The Study is intended to be an operational tool for a range of agencies involved in delivering social and economic transformation in the Black Country over the next 25 years. It is intended not only to set the framework for local strategies and actions but also to influence regional and national strategies and policy making - as a major contribution to the Government’s Sustainable Communities agenda and the objective to reduce regional economic disparities.

A3.8 The timing and format of the document though reflect its current role as the key supporting document for the RSS Review and the subsequent development of Black Country land use and transport planning policies. As such, its key purposes are to:

- Support and substantiate the Phase One Revision of Regional Spatial Strategy.
- Influence preparation of later phases of Regional Strategy Revision - including policies beyond 2021.
- Provide evidence and context for the formulation of a Joint Black Country Core Strategy.
- Offer a framework, not only for land use and transport planning change, but also priority actions for education, learning and skills and other social, environmental and economic initiatives.
- Provide the framework for the Black Country Strategy Delivery Plan which is published separately which will set out, sequentially, the action required to meet the Vision over the next 25 years, the agencies involved and the inter-relationships between initiatives.
- Highlight the risks of failure to overturn current trends.
- Create framework for future communities which are residentially, socially and educationally integrated.
A3.9 The scale of action required on the ground through land use and transport change is of such a large-scale, and may require 10 years or more lead-in times, the Black Country Strategy Delivery Plan will indicate where early action is required to meet needs that will arise after 2021. This will help provide continuity of momentum and avoid any imbalance between provision of new homes employment, transport and other infrastructure that will arise. The Delivery Plan is in the process of formulation and will inform the Examination in Public into RSS Phase One as well as inputting to City Region and other strategic initiatives.

A3.10 The Study is subject to approval processes by the Black Country Consortium. It is of a non-statutory nature (that is to say it will not form part of a statutory Development Plan), allowing regular and speedy updates.
A4 BLACK COUNTRY IN THE REGION

A4.1 The Black Country Study is a key contributor to Regional Spatial Planning. It underpins the draft RSS Phase One Revision for the Black Country. The Study supports the West Midlands Regional Assembly’s draft RSS Phase One Revision to the Secretary of State. The document illustrates the technical work undertaken to help determine the appropriate form of urban renaissance in the Black Country, consistent with the principles of the West Midlands Regional Spatial Strategy, and demonstrates the deliverability of the Revision Proposals.

A4.2 The Study has taken a longer perspective than RSS. It looks towards a longer term Vision to 2031 in order to map out direction of specific planning strategy which the current RSS takes to 2021. It conforms with the RSS spatial vision for the West Midlands to 2021 which provides the overarching spatial and statutory planning context for the Black Country Study to 2021. It articulates the Black Country Strategy to achieve urban renaissance in this Major Urban Area as required by RSS. In planning terms it needs to be read in conjunction with the RSS. RSS sets out planning policies for housing, economic development, environment, transport etc which remain in force. The RSS Review Submission documents, which take forward the planning component of this Study, do not therefore repeat policies which are already set out in the approved RSS for the West Midlands.

A4.3 The RSS is closely aligned with other West Midlands regional strategies, such as the Regional Economic Strategy and the Regional Housing Strategy. Whilst the RSS Phase One Review acknowledges this, the wider Black Country Study, by bringing new evidence and policy thinking forward for this significant sub-region, is intended not only to take forward these regional strategies but also to provide material which should be taken into account in action plans to implement those strategies and in review of those strategies.
A5  BLACK COUNTRY IN THE CITY REGION

A5.1  The Black Country is a distinctive sub-region but at the same time is an integral part of a city region centred on Birmingham as an international city located at the heart of Britain. The Black Country Consortium and its partners are committed to accelerating growth and economic competitiveness of the sub-region as an integral part of Our City Region. The City Region includes the four Black Country Boroughs, Birmingham, Solihull, Coventry and Telford covering a total population of 2.75 million. (Figure A5.1).

Figure A5.1
A5.2 The Black Country represents 40% of the City Region’s population. Accelerating economic growth in the Black Country will therefore make a major contribution to the economic performance of the City Region. In terms of GVA statistics if the Black Country is excluded, the rest of the Urban City Region makes a much more distinctive and extensive contribution to the regional and national economy. However, when the Black Country is included it exhibits a £0.8bn gap.

A5.3 This is accounted for by the Black Country’s £2.6bn output gap with the rest of the UK - that is the additional Gross Value Added (GVA) which would be generated by the sub-region if it was functioning economically on a par with the UK average. \textit{(Appendix A2)}. The urban renaissance of the Black Country, as set out in this document, is therefore a vital ingredient in the competitiveness of Britain’s largest City Region outside London.

A5.4 This Study represents over two years of detailed and thorough technical work and political engagement that enables the Black Country authorities to demonstrate clearly the scale and deliverability of growth and competitiveness within this sub-region of over 1m people over the next 20 to 30 years. \textit{It provides therefore a robust plan for the Black Country’s contribution to the delivery of growth and competitiveness of the City Region, including:}

- Building 44,000 new homes by 2021 (71,000 new homes to 2031) and a revitalised housing market, accommodating 125,000 more people (61,000 by 2021) and a culturally and economically diverse range of households.

- Economic restructuring accommodating up to 160,000 new jobs by 2031 (94,000 net additional), jobs primarily in Centres and Employment Land Investment Corridors, including 66,000 more jobs for knowledge workers (degree or equivalent). [2021 figures = c 105,000 new jobs (52,000 net additional jobs)].

- Accommodating up to 1.45m sq m more office floor space and a target of 380,000 sq m more comparison goods shopping, by 2031.

- 63,000 people in employment who are currently not working (80% activity rate).

- An integrated Black Country-wide education and skills system delivering 100,000 more people with qualifications.

- A transformed environmental image of the Black Country as ‘Urban Park’.

- An integrated transport system providing genuine connectivity to all Black Country Centres as well as to Birmingham.

\footnote{1 See Appendix A1 ‘CityRegion Output Gap’.
A5.5 It also provides the anchor for the delivery of growth and competitiveness in the western sub-sector of the City Region. The Study has established cross boundary working relationships with its Environs Group and specific joint studies, notably the Black Country and Telford Housing Market Study which is part of Regional Housing Strategy work. In this context the “Environs Group” is the ongoing dialogue between the Consortium and local authorities which lie adjacent to, or in the case of Telford and Wrekin, have strong economic and social ties.
A6 BLACK COUNTRY AND COMMUNITY PLANS

A6.1 Local Strategic Partnerships in the Black Country are an integral part of the Consortium and have participated in the processes of establishing the Black Country Vision and steering the direction of the Black Country Study and Strategy¹. The Study document is intended to provide an overall framework therefore for Community Plans – it is influenced by those local Visions and Strategies but now provides the framework by which those Community Plans should be aligned and work together to articulate the Strategy more locally and promote its implementation at a community level².

A6.2 Communities are recognised as a distinctive part of the existing character of the Black Country which must be carried forward and enhanced through the evolution of new communities for which the Black Country Strategy provides opportunity. Local Authorities and their partners in Local Strategic Partnerships will play a key role in ensuring that the implementation of the Black Country Strategy is undertaken through close working with communities and anticipates the needs and aspirations of new communities in the quality of the environment created and the range of services provided in neighbourhoods.

¹ A Bibliography of Technical Documents prepared and referenced in the Black Country Study is set out at Appendix A3.
² A Glossary of terms used in this document is set out at Appendix A4.
B  THE BLACK COUNTRY THEN AND NOW

B1  A BRIEF HISTORY OF THE BLACK COUNTRY

B1.1 The Black Country represents an identified urban area, largely founded on coal mining – hence the name – and the development of iron and steel, metal manufacture and metal goods. Limestone and coal, allied to local peoples’ skills and other raw materials provided the foundation of the area’s wealth. Technology developed from the first use of minerals, and timber from woodlands, to the use of water power and thence to the Industrial Revolution, the age of iron and steel and of machines and manufacturing. The area’s natural and geological heritage is inextricably bound up with its cultural heritage and economic development. The area developed around a series of market towns, and smaller communities, closely related to the plethora of coal mines and industrial complexes which were heavily dependent on coal, iron and limestone as basic raw materials.

Physical history

B1.2 The complex pattern of settlements in the Black Country subsequently merged to form a mini-conurbation, but with a series of highly valued green wedges of land. These wedges maintain some separation between towns and are highly valued by local people as links from the urban area to the countryside beyond. Their importance has been reflected in their Green Belt status in successive development plans.

B1.3 The people of the Black Country have a strong sense of community identity; they identify with the Black Country itself but also to the smaller towns in which they belong and which together make up the mini-conurbation.

B1.4 Whilst there is a clear identity to the area, its physical and functional links to the adjacent City of Birmingham are extensive with high levels of social and economic interdependencies. Indeed, three of the four Boroughs have boundaries with the City.

B1.5 The Black Country also has strong functional ties with a group of towns in southern Staffordshire, based around Cannock and Burntwood, which were also founded on coal and other mineral extraction. Lichfield, and to a lesser extent Tamworth, are additional communities which have acted as recipients of Black Country and Birmingham people over many years as they have grown into commuter settlements as well as free-standing towns, with many people commuting daily into the Black Country and Birmingham.

B1.6 In planning for the future of the Black Country, these inter-dependencies are critical; a balance needs to be struck between relative self-sufficiency in meeting housing and employment needs, whilst also exploiting the benefits of links to surrounding areas.
Socio-economic history

B1.7 The Black Country’s strength in mining and metal manufacture and metal goods proved to be a major economic driver in the sub-region through the Industrial Revolution until the 1960s. At that time unemployment was very low and female activity rates were amongst the highest in the United Kingdom. The Black Country was an economic power-house of the region and the UK’s export efforts.

B1.8 The process of structural change in the national economy, away from heavy industry to new technologies and knowledge-based industries, was not matched by the same speed of adaptation in the Black Country.

B1.9 Rationalisation of industrial activity produced large-scale site redundancy, notably steel and metal manufacturing plants (e.g. Patent Shaft, Bilston, Round Oak and Coombs Wood Steelworks). Such sites have provided major opportunity for land use transformation. However, recycling of industrial land has been a continuing process for over 200 years and each site yields highly and increasingly complex, extensive and expensive challenges for land reclamation.

B1.10 Since the 1970s, the Black Country has experienced a continuous net outflow of Black Country people driven by a number of “push” and “pull” factors. Areas beyond the Black Country, such as Telford New Town, have developed new housing in attractive and accessible locations, providing a focus for accommodating Black Country families (the ‘pull’ factor). Meanwhile, the lack of sufficient scale and variety in house building, more restricted job opportunities and the poor quality of the environment in the Black Country have combined as persuasive “push” factors in people’s decision to leave.

B1.11 As a counterbalance, the Black Country has proved to be an attractive area for British Ethnic Minority groups, bringing diversity in culture, aspirations and economic activity.

B1.12 The process of radical change in the Black Country over the last 50 years has been met with new policy responses across the full range of social and economic services, with notable successes in the transformation of the area. However, the pace of change has been such that policy response now needs a scale of acceleration unprecedented in the area, and indeed, in many similar areas of the United Kingdom and Europe which experience similar processes of social, economic and physical change.
B2 THE BLACK COUNTRY TODAY

A diverse community of over 1.0 million people

B2.1 Black Country is a major urban area supporting a population of almost 1.1 million people, one fifth of the West Midland’s population – 285,800 in Sandwell, 252,800 in Walsall, 239,100 Wolverhampton and 304,500 in Dudley

Table B2.1: Population in the Black Country by Age Band

<table>
<thead>
<tr>
<th>Age band</th>
<th>Black Country ‘000’s</th>
<th>%</th>
<th>City Region ‘000’s</th>
<th>%</th>
<th>West Midlands ‘000’s</th>
<th>%</th>
<th>England ‘000’s</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-14</td>
<td>207</td>
<td>19.1</td>
<td>544</td>
<td>19.8</td>
<td>1,000</td>
<td>18.7</td>
<td>9,105</td>
<td>18.2</td>
</tr>
<tr>
<td>15-19</td>
<td>73</td>
<td>6.7</td>
<td>195</td>
<td>7.1</td>
<td>360</td>
<td>6.8</td>
<td>3,261</td>
<td>6.5</td>
</tr>
<tr>
<td>20-39</td>
<td>288</td>
<td>26.6</td>
<td>773</td>
<td>28.2</td>
<td>1,417</td>
<td>26.6</td>
<td>13,856</td>
<td>27.7</td>
</tr>
<tr>
<td>40-64</td>
<td>334</td>
<td>30.8</td>
<td>805</td>
<td>29.4</td>
<td>1,693</td>
<td>31.7</td>
<td>15,870</td>
<td>31.7</td>
</tr>
<tr>
<td>Over 65</td>
<td>182</td>
<td>16.8</td>
<td>423</td>
<td>15.4</td>
<td>865</td>
<td>16.2</td>
<td>8,002</td>
<td>16.0</td>
</tr>
<tr>
<td>Totals</td>
<td>1,082</td>
<td>100.0</td>
<td>2,740</td>
<td>100.0</td>
<td>5,334</td>
<td>100.0</td>
<td>50,094</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: ONS, mid-year population estimates 2004

B2.2 There is a higher proportion of young and old people (0-14 and over 65 years) in the Black Country than the regional or national averages, meaning that fewer people are of working age.

B2.3 Over the past sixty years, the Black Country has become a vibrant, welcoming multi-cultural society. It is home to significantly more people of Black, Minority and Ethnic (BME) origins, (15.2% of the population), compared to the national average (9%). In particular, the proportion of people who are of Asian origin is significantly higher than in the West Midlands or in England as a whole. The West Midlands Region is home to the second largest Indian community in the UK, of which a significant proportion (40%) have chosen to live in the Black Country. Inward migration and the establishment of new residential communities contributes significantly to the enterprise, entrepreneurialism and dynamism of the Black Country.

Table B2.2: Ethnic Composition

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Country</td>
<td>10.4%</td>
<td>2.6%</td>
<td>15.2%</td>
<td>84.8%</td>
</tr>
<tr>
<td>City Region</td>
<td>9.9%</td>
<td>2.5%</td>
<td>14.8%</td>
<td>85.2%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>7.3%</td>
<td>2.0%</td>
<td>11.3%</td>
<td>88.7%</td>
</tr>
<tr>
<td>England</td>
<td>4.6%</td>
<td>2.3%</td>
<td>9.1%</td>
<td>90.9%</td>
</tr>
</tbody>
</table>

Source: ONS Census 2001

1 ONS mid-year population estimates 2004.
Net outward migration

B2.4 Between 1950 and 1970, the Black Country’s population grew by 115,000 (11%) and 84,000 households (+28%). This rapid growth was supported by unprecedented growth of the dwelling stock (+104,000) to accommodate household growth and the post-war shortage\(^2\).

B2.5 However, today the Black Country is one of only three sub-regions experiencing population decline in the decade to 2001. (Figure B2.1). Unsurprisingly population in the Black Country fell by 20,000 in the same period, reflecting a combination of factors including the nature and scale of demand, levels of affordability and mismatch between demand and the typed housing available to meet it. Since 1990, house building has fallen behind household formation for the first time in the post-war period variably across the sub-region.

Figure B2.1: The Sub-Regional Geography of Net Migration, 1991 - 2001

Source: Local Futures Group, derived from ONS data

B2.6 This population decline is predominantly the result of net outward migration; recent trends point to a cascade movement outwards from the core to the periphery of the conurbation and beyond. Those higher earners with greater choice are leaving for a better environment and quality of life; they want ‘greener’ and ‘cleaner’.

\(^2\) Black Country Housing Market Thinkpiece, CSR Partnership, June 2004
A £2.6 billion output gap

B2.7 The Black Country economy has been under-performing for the past 30 years; a £2.6bn ‘output gap’ (measured by Gross Value Added) has developed with the rest of the UK\(^3\). The gap can be attributed to low employment rates, low skills and low business birth rates.

100,000 fewer jobs than in the 1970s

B2.8 Today, there are 500,000 jobs in the Black Country; this is 100,000 less than in the 1970s\(^4\). Even though much of this loss has been in manufacturing, this sector still accounts for 22% of total employment in the Black Country compared with only 13% in England as a whole.

B2.9 Over the past decade, the UK economy has seen strong growth with employment reaching record highs. If the Black Country economy had grown at the same rate as the national economy, an additional 42,000 jobs should have been created. However, the sub-region only saw a net increase of 7,000 jobs\(^5\).

Currently, the employment rate in the Black Country is 70%. As shown in Figure B2.2 below, this is well below the West Midlands, England and the South East. The Government has set a national target of 80% - the employment rate in London and the South East.

Figure B2.2: Employment Rate

![Employment Rate, 2003](image)

Source: Labour Force Survey (LFS), 2003

Few knowledge-based industries

B2.10 Less than 20% of workers in the Black Country are employed in sectors with the highest levels of ‘knowledge workers’ (sectors with 40% or more graduates in their workforce) compared with 30% nationally\(^6\).

B2.11 Figure B2.3 below shows the spatial distribution of knowledge workers in the Black Country and surrounding area; the darker colours indicate higher concentrations. It clearly highlights the process of decentralisation

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\(^3\) See Appendix A2.

\(^4\) See Chapter D1 Para D1.2.

\(^5\) See Appendix D1.

that has been occurring in the sub-region, with high earning knowledge workers moving to suburbs outside the Black Country.

**Figure B2.3: Knowledge-based workers in the Black Country, 2003**

Source: Local Futures Group 2003

**Low skills and income**

B2.12 Many of the people in the Black Country live in communities which are now extremely deprived by comparison with communities elsewhere in England. These were formally prosperous communities; during the 1970s, the average earnings of many workers in the West Midlands exceeded the Great Britain average (particularly in manufacturing and manual employment).

B2.13 More people in the sub-region have lower skill levels than nationally. Nationally, 29% of adults have no qualifications, in the Black Country it is 41%. Moreover fewer have higher skill levels; 20% of adults nationally have higher level qualifications (Level 4+), but in the Black Country it is just 12% (Census 2001). If the Black Country had the same educational attainment levels as in England and Wales as a whole, 60,000 more people would have a degree or equivalent, and a further 100,000 would have other qualifications.

B2.14 Lows skills levels and the lack of knowledge workers means that average earnings in the Black Country are 81% of the UK level. If current trends continue, the earnings gap will widen further to 76% by 2031. Only 15% of the population have higher income levels (defined in the Census as social class A/Bs) compared to 22% nationally.

**Centres losing market share**

B2.15 Thirty years ago, there was a clear hierarchy of centres in the Black Country with Wolverhampton the dominant centre. Such was its scale, that it had the same number of shops as Birmingham (but only 60% of the retail sales). Walsall, West Bromwich and Dudley were all significant shopping centres serving their borough catchment populations and parts of adjacent areas of the Black Country and beyond.
B2.16 There have been dramatic changes since the 1970s. The expansion of shopping in Birmingham, the development of Brierley Hill/Merry Hill and out of centre retail parks have all had a major impact on the Black Country. Wolverhampton’s retail sales are now only 20% of Birmingham’s, and Merry Hill has become the largest centre in the Black Country. Walsall and, in particular Dudley and West Bromwich, have all experienced a significant outflow of retail expenditure, mainly to Birmingham. Social and economic changes have contributed to the nature and pattern of change.

B2.17 There are four main retail centres in the Black Country. In order of size, they are Brierley Hill/Merry Hill, Wolverhampton, Walsall and West Bromwich. The lack of sufficient quality retail in these centres, including flagship department stores, means that higher income groups tend to shop outside the Black Country. There is a lack of sufficient quality entertainment, cultural and leisure opportunities to attract visitors and expenditure.

Poor quality housing and lack of choice

B2.18 The Black Country is dominated by uniform concentrations of relatively low priced private housing and very substantial concentrations of social rented housing. There are relatively few communities with higher value lower density housing, except on the edges of the Black Country.

B2.19 Much of the housing stock was built initially as private rented housing to accommodate those working in the mining and manufacturing industries; this is now relatively low priced owner occupied housing. Between 1950 and 1970, 104,000 dwellings were built, increasing the Black Country housing stock by 37%. Population growth in this period was accommodated in large new local authority housing estates and private housing for first time purchasers - much of it on former industrial land.

B2.20 Black and ethnic minority communities are expanding more rapidly than the population as a whole. This is a result of their youthful age profile, and continued in-migration from elsewhere. These ethnic communities have sustained the population in many areas of the Black Country and often live in larger households. As a result, there is overcrowding in some areas and an acute shortage of larger homes.

Hidden environmental and heritage assets

B2.21 The Black Country was one of the cradles of the industrial revolution. This set the structure of its distinctive towns and communities served (and divided by) its historic road, rail and canal networks. The legacy of heavy industrial sites dominates the image of our communities rather than the topography, green spaces, and natural water features. There is little sense of distinction between one locality and another though local communities have a great affinity to their local area.

B2.22 To the casual observer, much of the Black Country exhibits an industrial legacy mixed intensively with housing and other uses. But from the air,
the Black Country also has a surprisingly extensive green character to it. Open spaces stand out – on former industrial/mineral sites, along valleys, disused railway lines, along canals, parks and playing fields and on the Black Country’s hills. Some of these spaces are inaccessible to the public, appear visually unattractive from the ground (though they may be rich in their biodiversity), and do not provide stimulating vistas. There is however a strength of urban heritage, some of which is recognised and exploited, yet other elements are hidden and have yet to develop their full potential.

Climate change

B2.23 Above all, Climate Change is a key challenge to guide our efforts to transform the Black Country. As the UK climate gets warmer there will be changes to both average and extreme weather conditions, including more extreme rainfall events and increased risks of flooding. Transport accounts for 25% of all greenhouse gas emissions. Transport related emissions are forecast to rise, coupled with growth, this is a particular challenge to land use/transport planning of the Black Country. However, the achievement of urban renaissance and the stemming of decentralisation lies at the heart of the Regional Spatial Strategy. Achievement of these goals in the Black Country, directed by the Black Country Study and the RSS Phase One Revision will contribute to ameliorating climate change by reducing long distance commuting and maximising the potential for use of public transport and walking and cycling. There are a number of related environmental challenges including - variable air quality, insufficient open and accessible open space, reduction in biodiversity areas, variable water quality and pollution, land contamination, recycling and the recovery of waste, and increasing the conservation, efficiency and sourcing of energy.

B2.24 The Government is encouraging a positive approach with a programme of integrated policies and measures to:

- Improve business’s use of energy, stimulate investment and cut costs.
- Stimulate new, more efficient resources of power generation.
- Cut emissions from the transport sector.
- Promote better energy efficiency in the domestic sector.
- Improve energy efficiency requirements of the buildings regulations.
- Continue the fall in emissions from agriculture and forestry.
- Ensure the public sector takes a leading role.

B2.25 On this basis, Black Country change across all sectors has the potential to deliver or implement action to reduce carbon emissions. The Black Country will therefore play its full part in helping to combat climate change.
A congested transport network

B2.26 The Black Country is located at the heart of Britain’s motorway network which provides excellent links to all key UK and European markets. However, the motorways through, and on the edge of the Black Country, serve both long distance and local business and commuter traffic. As a result, at peak periods, the motorway network – and many key roads within the Black Country – suffer from severe congestion. Journey times within the Black Country, to and from Birmingham city centre, and key other locations in City Region, are particularly slow.

B2.27 The network of passenger and freight rail lines serving the Black Country perform national, regional and local roles. Rail usage is increasing in the West Midlands more than nationally and usage of some local stations has increased substantially over the past decade. However, the twin-track rail service linking Wolverhampton and Sandwell and Dudley with Birmingham, Coventry, London and destinations to the North and South is nearing capacity as it provides both local and national services.

B2.28 Looking to the future, in the UK as a whole, current trends suggest that more people will use their cars for more frequent, longer trips. The same is likely to occur in the Black Country unless bus, rail and Metro systems are improved and expanded. The already congested road network will be put under more strain; there will be an increase in the number of roads and junctions at which people experience significant delays. Average journey times will lengthen. If population decline is arrested – as intended – road congestion will increase further unless public transport systems radically improve and cycling and walking made more attractive as alternative sustainable forms of transport. Reducing congestion will be a key component of improving the environment in the Black Country and contributing to a thriving modern economy and reducing carbon emissions.

Deprivation and Health

B2.29 The recent Regional Lifestyle survey illustrates the link between deprivation and ill health. One third of respondents living within the most deprived quintile of the West Midlands described themselves as being in “good health”, while over half those living within the least deprived quintile did so. 23% of those living in the most deprived quintile report being in “not good health” compared to just 10% of those in the least deprived quintile.
B2.30 The Health Poverty Index reflects the complexities of health inequalities taking full account of the wider determinants. Figure B2.5 below illustrates the Black Country position benchmarked to England. For each indicator, a score of zero indicates the best situation in terms of health poverty and a score of one the worst situation. It is clear from the figures that the Black Country scores unfavourably.

Figure B2.5: Health Poverty Index (Black Country & England)

http://www.hpi.org.uk
B2.31 Each indicator has been scaled linearly with reference to scores across all the groups being compared (i.e. all local authority areas in England). For each indicator, a score of zero indicates the best situation in terms of health poverty and a score of one the worst situation. In other words, an area with a score near zero for a particular indicator has lower levels of health poverty in that domain than an area with a score near one. The Black Country figure is an average of the scores for the Black Country local authority areas.

B2.32 Three of the four local authority areas in the Black Country are in the bottom fifth nationally for 3 or more of the following 5 indicators:

- Male life expectancy at birth.
- Female life expectancy at birth.
- Cancer mortality rate in under 75s.
- Cardio Vascular Disease mortality rate under 75s.
- Index of Multiple Deprivation 2004 (Local Authority Summary), average score.

B2.33 Life Expectancy

A Black Country man can expect to live 1.4 years less than national average. A female living in the Black Country can expect to live .8 years less than national average.

*Figure B2.6* below highlights the life expectancy rankings by local authority comparing those born in 1991-1993 with those born from 2001 - 2003. Areas are ranked out of the 432 local authority areas in England with 432 being the worst. Dudley, Sandwell and Wolverhampton have all experienced a rise in their rankings but have recorded an increase in the number of years people are expected to live indicating that other areas are improving at a faster rate.
**Cause of death – ‘The Big Killers’:**

B2.34 Of the 12,000 people who died in the Black Country in 2003, 4,500 (38%) died from Circulatory Disease. The national death rate from circulatory diseases was 102.8 per 100,000 people between 2001-03 while the Black Country average was 124.1. 3,500 people (25%) died from Cancer. The national death rate from cancer was 124 per 100,000 between 2001 - 03, while the Black Country rate was 136.6.
B3 THIRTY MORE YEARS OF BUSINESS AS USUAL?

B3.1 If the Black Country continues to experience current trends, there are potentially profound implications for the prosperity and well-being of people in the Black Country, the city region, the region and the UK as a whole. If ‘business as usual’ carries on, what can be expected over the next 30 years?

Falling employment

B3.2 If the right conditions are not created for the Black Country economy to grow - a strong workforce, new employment sites and a high quality environment - baseline forecasts predict 15,000 fewer jobs by 2030\(^1\). Job creation in the service sector will be insufficient to counter the losses in manufacturing (around 66,000 by 2030).

A widening of the income gap

B3.3 The evidence points to a further widening of the income gap with the rest of the UK should the Black Country economy continue performing at its current level. Forecasts by Oxford Economic Forecasting (OEF) predict relative incomes will fall from 81% of the UK average today to 76% by 2030. In terms of occupational structure, 15,300 fewer managers can be expected.

Further outward migration

B3.4 If new high quality, attractive residential environments are not created or the area fails to provide sufficient well-paid jobs, a further 84,000 will leave the Black Country by 2033\(^2\). In other words, for every 11 people living in the Black Country today, only 10 will be living here in 30 years.

Fewer households

B3.5 Current trends in the housing market indicate that, without an acceleration in house building, there will be 3,000 fewer households by 2031.

A failing city region economy?

B3.6 The Black Country is key to the success of the City Region. The Black Country’s £2.6 billion output gap is the principle component of the city region’s output gap\(^3\). If current trends continue, GVA per head in the Black Country will fall from 84% of the UK average to nearer 80% by 2030\(^4\).

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\(^3\) See Appendix A2.

C VISION, CHOICES AND THE PREFERRED STRATEGY

C1 THE BLACK COUNTRY VISION

C1.1 The Vision provides the driving force behind the Black Country Study; it sets out where the Black Country should be in 2033. In 2003, the Consortium held a series of workshops attended by over 150 civic and business leaders, community representatives, educationalists and young people. In these workshops, the Consortium identified several alternative futures for the Black Country and a preferred vision. The Consortium agreed that only by aiming high would a renaissance of the Black Country be achieved.

<table>
<thead>
<tr>
<th>The Black Country Vision</th>
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<tr>
<td>'In 2033, the Black Country is a confident, ‘we can do it’ place. We are proud of our skills, our proficiency and our work ethic – these are key to our prosperity. The Black Country is now a truly Polycentric City – made up of four thriving and distinct retail and commercial 'City' centres – each one playing a unique role’. Black Country Society will be inclusive and cohesive with equal opportunities for all to work, live and participate.</td>
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<td>'In summary, the Black Country Vision for 2033 is of a Black Country compromising many different communities – offering a choice of very desirable housing for all. We will be celebrating our multi-cultural society. Educational attainments will match anywhere in Europe. A transport revolution will have taken place with our bus, Metro, rail and road networks making it easy to move around the Black Country, into Birmingham and to the rest of the City Region’.</td>
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<td>'Our manufacturing companies will be prospering, at the cutting edge of technological innovation. Our four main centres – Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill – will each offer a distinctive, wide range of shopping, leisure and cultural facilities, office employment, and housing. Our canal system, linking our communities together, means we are known as Britain’s Venice. Our high quality environment – not our industrial legacy – dominates the urban landscape’.</td>
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<tr>
<td>All Black Country citizens will have a deep sense of belonging and will be enabled to contribute actively to the social, economic and physical well-being of the Black Country. We will maximise the use of the talents of all our communities and citizens, having dismantled barriers to opportunity and removed discrimination. The Black Country will be genuinely inclusive and integrated in residential, economic, social and educational terms.</td>
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C1.2 In setting out this Vision the Black Country Leaders identified **four critical workstreams** to take it forward:

1. To establish a Strategic Plan to achieve the Black Country Vision (The Black Country Study).
2. To establish an integrated Black Country Education and Learning Strategy.
3. To promote the value of the Black Country Canal Network and Its Environs through pursuing World Heritage Status, together with Birmingham.
4. To develop a Youth Inclusion Strategy and Young People’s Parliament.

C1.3 Flowing from the Vision, the Consortium set **four headline objectives for 2031** to drive the Black Country Study. If successful in these four areas, the transformation of the Black Country will be well underway. The four headlines objectives are to:

1. **Reverse net out-migration** and grow population to 1.2 million (+120,000).
2. **Raise income levels** to 90% of the UK average from 81% today.
3. **Accommodate a more balanced population**, achieving parity with the national profile of social grade in the population by increasing the proportion of A/B households to the national average (22%) from 14.8%; and
4. Create a high quality, **sustainable environment**.

C1.4 In recognition that it is children and young people of today who will inherit the consequences of the Vision-led actions and through their skills and endeavours and decisions will play an ever increasing role in shaping the future Black Country, the Vision-making process specifically engaged with young people. Young people have led some of the Vision-making events, have been engaged in arts-based future scoping and have, through the auspices of the Connexions Service, made contributions to the development of the preferred strategy through the RSS Phase One Revision Choices Consultation process. They will continue to be engaged in this vital activity across the Black Country by working through the network of public, private, voluntary and community sector organisations and individual contributions.
C2 TRANSLATING VISION INTO THE BLACK COUNTRY STRATEGY FOR GROWTH AND COMPETITIVENESS

Vision-Led Approach

C2.1 The Black Country Study adopts a Vision-led approach to planning change in contrast to recent trend-based planning scenarios. The Study set out to articulate what vision aspirations mean in terms of real change and to test that against current trends.

C2.2 To do this the Black Country Consortium combined the processes of officer-led technical studies and professional advice with ‘hands-on’ involvement of the political leaders of the four constituent Black Country local authorities working alongside chairs of other key stakeholder bodies and the private sector. This provided a new dimension to planning change, whereby leaders received and responded to evidence and external advice and they in turn provided steers with regard to the scale and direction of change to be tested. The process has involved a series of weekends away to receive evidence, to debate its implications and to agree jointly across four local authorities (and between public and private sector interests) steers for the next stages of work and to build up the Black Country Strategy.

A Public-Private Partnership Process

C2.3 This approach has fostered a ‘Can Do’ leadership mentality, informed by real understanding of the scale of the challenge to achieve Urban Renaissance in the Black Country. Critical to this has been the involvement of the private sector who have challenged public sector leaders and provided a sense of urgency regarding the speed, scale and quality of decision-making and change required to enable the Black Country (its citizens and its businesses) to compete in the global market.

C2.4 The Black Country Study, by the nature of this process, reflects progress to date in setting out the scale and direction of change to achieve growth and competitiveness in the Black Country. It represents therefore a stage in ‘work in progress’. Its timing underpins the submission of the draft RSS Phase One Revision to the Secretary of State amongst other functions and provides a key Black Country contribution to the City Region Development Plan. (See Section A5).

C2.5 The process itself has enabled Black Country partners to challenge trends and commence the process of building public/private partnerships to create new markets and sustainable development in the Black Country.
Testing Growth and Competitiveness

C2.6 The development of the Black Country Strategy has been led out by the testing of the two fundamental premises of achievement of population growth and creation of economic competitiveness in the Black Country, against recent and forecast trends of population decline and reducing relative productivity.

C2.7 The two key initial studies involved therefore understanding:

1. What RSS house building targets meant for the Black Country in terms of net migration, household and population growth and testing the capacity to accommodate such growth and its implications.

2. What economic change would be required to the Black Country economy to achieve the Vision-led objective of 100% UK average income (that is the UK average without London and SE).

C2.8 The Demographic Study demonstrated that achieving the proposed minima house building targets to 2021 set out in the West Midlands Regional Spatial Strategy would involve reversing current net out migration of around 4,000 persons pa and replacing it with average net inward migration of some 1,100 persons per annum from 2011 to 2021.

C2.9 The Black Country leaders were anxious to achieve this and to test whether it would be feasible to grow the Black Country further, either by accelerating growth to 2021 or by extending it beyond 2021 to 2031. Scenarios were therefore tested ranging from holding Black Country growth to natural growth only (nil net migration); to continuing RSS house building rates (further 5% of growth); and onto significant growth scenario of +10/15% from 2021 to 2031. A Housing Capacity Study was commissioned to test the implications of these scenarios.

C2.10 Alongside this, consultants were commissioned to review trends in the Black Country economy (within the framework of regional and national growth forecasts) and to examine how the Black Country economy would need to change to achieve the aspirational income growth scenario, given its current strengths and weaknesses. The Economic Study set out the scale and direction of change that the Black Country economy would need to experience and assessed the implications of this with regard to environmental and land use change. An Employment Land Capacity Study was commissioned to assess the land capacity for meeting future economic needs.

C2.11 The findings of these studies (supported by additional work on the role of Centres, the functioning of the Housing Market in the Black Country, implications of growth on transport and accessibility and assessment of Environmental issues and assets) provided the framework for the

The Black Country Strategy

C2.12 Through the Visioning process the Black Country Leaders concluded that the Black Country Vision was achievable but acknowledged that it would require a major transformation of the Black Country environment, its skills and business base, and the nature of its land use structure and transport network.

The key components of the Black Country Strategy to 2031 which emerged were:

<table>
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<th>The Black Country Strategy</th>
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<tbody>
<tr>
<td>1 Growing the Black Country:</td>
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<tr>
<td>• Reversing net out migration and increasing (though modest) net in-migration from 2011 onwards leading to population growth of 125,000 people to 1.2m in 2031</td>
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<tr>
<td>• Delivering RSS minima housing targets to 2021 and continuing beyond at a rate of 3,600 new homes per annum to 2031 – 71,000 new households by 2031.</td>
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<tr>
<td>• Recognition that accommodating this growth would require radical land use restructuring involving the transfer of poor quality former employment land into new residential environments.</td>
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<tr>
<td>• Accommodating diversity and better balance of population in socio-economic terms – 50,000 more A/B households choosing to live in the Black Country.</td>
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<tr>
<td>• Recognition that to provide the quality and choice not only will new residential areas need to be created, but also that there would be a need for progressive remodelling of poorer quality and unpopular residential areas of both a public and private nature.</td>
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The Black Country Strategy

2 A Competitive Black Country:

- Education and skills and transformation of the Black Country environment have been identified as the two most important drivers of this economic change.

- Creation of a knowledge driven economy with at least 100,000 more people with qualifications and 60,000 more knowledge worker jobs (degree +) by 2031.

- Creation of 160,000 new jobs (94,000 net counteracting decline of up to 65,000 manufacturing jobs), with a particular focus on new jobs in finance and business services, and in logistics (for which the Black Country exhibits a competitive advantage).

- All business activity in whatever sector, including the manufacturing sector, which would still employ 47,000 people, must be dominated by high value added businesses.

- 63,000 more Black Country people in employment (80% activity rate) by 2031.

- To accommodate this strategic change each of the Black Country’s four strategic centres would require expansion (location of retail and office growth elsewhere of the scale required being considered to be unsustainable).

- Additionally new employment land is required of much greater quality and accessibility, including land for the creation of Technology Parks (to foster new business incubation and growth) and Research Institutions.
The Black Country Strategy

3 A Transformed Black Country Environment and Infrastructure:

- Both the new economy and housing will require a new Black Country environment to sustain it – that is to hold onto and to attract wealth generating residents and businesses.

- People and businesses will also require an effective, reliable and sustainable transport system which connects people to jobs and activities in the Black Country Centres (and to Birmingham City Centre) and to new employment land locations.

- Knowledge business requires both access to knowledge workers but also quality reliable access to markets and international opportunities.

C2.13 The Studies also informed the development of Choices regarding future land use patterns and transport to support the Black Country Strategy - the development of a future Black Country Spatial Strategy through the Phase One Revision.

Communities

C2.14 The future Black Country will be one of place, business and above all people. The Consortium has focused on young people in creating the Vision and strategy for the long term (30 year) future of the Black Country. The Vision has been strengthened as a result of the work on diversity and social cohesion. This work is summarised in (Chapter D6) of this report, where the importance of being pro-active is recognised in supporting the existence of cohesive communities, of maximising the potential of individuals and communities and of tackling poverty. Housing (Chapter D3) in particular highlights these issues. Through this report the need to focus more effort in developing this pro-active approach has been identified as an integral part of delivering the Black Country Strategy.
C3 CHOICES

C3.1 In developing the Vision, the Consortium recognised that in respect of the scale of change and the spatial pattern of land use change, there were clear choices to be made and tested. The period 2004/5 involved comprehensive research to test the appropriateness, realism and risks of the Vision and to outline the choices for the future. This was implemented through a series of economic, centres and capacity studies. The relevant documents are listed in Appendix A3.

C3.2 The Study has taken these fully into account in the preparation and substantiation of policy responses and the Delivery Plan. Some of the most fundamental decision areas were as follows:-

The scale of housing growth

C3.3 Three options were tested relating to the scale of housing growth with the existing Regional Spatial Strategy (RSS) to 2021 identified as the starting point.

i) RSS + 2% to 2031

C3.4 This would represent (beyond 2021) a slow down of the strategy of reversing net out-migration and accommodating Black Country housing needs. It represents a strategy to accommodate natural growth only, that is zero net migration from 2021 onwards.

C3.5 It was considered that to plan for deceleration would encourage a return to the negative impacts of earlier trends, failure to attract back and retain A/B households and the knock on effects upon average incomes, retail expenditure and the skill requirements of new technologies.

C3.6 This option was thus discounted. Moreover, a return to the previous trends would mean that if at some stage beyond 2021 the negative impact of such trends, would need a strategy which returned to the Visions scale of actions required and a quantum leap in remedial actions similar to that proposed in the current Vision.

ii) Continuation of RSS growth rate to 2031 (i.e. RSS Growth to 2021 with a further 5% addition to 2031)

C3.7 This would represent a continuation to 2031 of the annual additional housing completions proposed in RSS to 2021. The resulting housing increase of 71,000 units by 2031 had been used as one basis for the Vision with the attendant objectives of increasing the number of A/B households by 50,000 and personal incomes to a level commensurate with the national average (excluding London and the South-East) by 2031.

C3.8 The economic research by GHK (the Economic Study) had projected future job needs derived from the population increase achieved by this level of net additional homes.
C3.9 The Housing Capacity Study undertaken by Halcrows provided estimates of land likely to be required for this option, and the alternatives (i) and (iii). The results were cross-referenced to the employment land capacity study produced in tandem, by GVA Grimley with GHK who had prepared the earlier economic study.

C3.10 The Housing Capacity Study concluded that there should be sufficient occupied employment land, or allocated employment land to meet the requirements of (i) and (ii), whilst enabling the Black Country to provide a portfolio of quality employment areas to meet the needs of new technologies and industrial diversification.

**iii) RSS + 10/15% to 2031**

C3.11 This represented a very challenging acceleration of the rate of new housing beyond the RSS figures for 2021, which is in itself a challenging increase in historic house building rates.

C3.12 The Capacity Studies showed that the required land transfer from employment to housing to achieve this scale of growth would create a serious shortfall in land needed to meet the requirements of economic diversification and growth in the Black Country and the quality land offer so essential to attract sufficient mobile investment.

C3.13 Since this option (iii) very much exceeded the area’s capacity to achieve required housing levels, it was dismissed.

**The scale of employment growth**

C3.14 The Vision sought to match housing and population growth with sufficient employment opportunities. In this the Vision recognised the sustainability benefits in achieving this balance, seeking to avoid both encouragement to increased out (or in) commuting.

C3.15 This sustainability objective did not seek to achieve self-sufficiency for the Black Country in a manner which could be regarded as isolationism. Rather it recognised the existing complex pattern of inter-dependencies between the Black Country and surrounding areas in terms of daily cross-boundary workforce flows.

C3.16 The sustainability objective equally tied in with aspirations to control congestion and encourage modal shift in travel habits.

C3.17 The Vision’s employment targets include the need to counter-balance the substantial reduction in manufacturing employment (-65,000) which GHK forecast for the period to 2031 as a consequence of improved productivity, and changes in the structure of manufacturing.

C3.18 However, the Consortium were aware of regional economic work based on an alternative forecasting model. The effect of this approach would reduce the scale of manufacturing employment reduction by 20,000.
C3.19 The employment land capacity consultants were therefore requested to assess the likely changes in land requirements under the more optimistic (latter) scenario.

C3.20 This concluded there would be no material effect on overall land requirements sufficient to alter either the preference for housing option (ii) or the overall approach to providing a quality employment land portfolio.

C3.21 The consultants referred to a series of variables influencing long-term land needs including varying assumptions on future employment densities. Coupled with the increasing efficiencies in the use of industrial floor space, no material changes in land supply were felt to be required.

C3.22 The worst case scenario in respect of manufacturing job change (i.e. ~65,000 jobs) remains the basis for the employment land strategy. Its acceptance has not changed the overall strategy for retained employment land since there should remain adequate land to fulfil either level of reduced manufacturing employment.

Retail floor space requirements

C3.23 The Vision objectives in respect of household projections, income changes and targets for additional A/B households formed the basis for consultants to advise upon future retail floor space requirements to 2031.

C3.24 A report by GVA Grimley (the Centres Study) identified a scale of comparison goods floor space derived from the above Visionary objectives. The floor space calculations to 2031 were based on the “best case” scenario i.e. that all components of the Vision would be fulfilled in the period. The Consortium accepted the advice of the consultants to the effect that variations in any of these Visionary components, and indeed the influence of other variables, could affect the long-term requirements for comparison goods retail floor space.

C3.25 Calculations of need are based on the Black Country retaining its market share of retail spend, based on the current share and capturing that share derived from future growth in retail spending and the spend derived from the growth and nature of population as proposed for the area.

C3.26 Thus, with advice that the forecasts of requirements were sustainable the Consortium have maintained the levels of floor space based on the expenditure capacity derived from the assumptions underlying the Vision. However, it was decided that the influence of e-tailing should be recognised in calculations of retail floor space. Thus GVA figures of need were scaled downwards as a consequence.

C3.27 The GVA Grimley Centres Study incorporated an allowance of 7% of comparison goods expenditure for e-tailing (i.e. expenditure that would be deflected from shopping centres into internet spending, thus taking the potential turnover away from the centres).
C3.28 The more recent (2006) Roger Tym and Partners Regional Centres Study commissioned by the Regional Assembly for the RSS Phase Two Revision accommodated a 20% turnover allowance for e-tailing based on most recent estimates as to the extent of turnover likely to be taken up by e-tailing by 2021.

C3.29 This clearly has significant impact on comparison retail floor space needs. Application of the “precautionary principle” suggests the need to acknowledge the material impact of e-tailing, and thus Visionary floor space requirements have been adapted accordingly. However the pace and scale of growth of e-tailing needs to be maintained, as with other variables, and adjustments to need be considered as a consequence.

C3.30 This is the preferred choice that has been made regarding comparison goods floor space requirements.

C3.31 As with other components of the Vision, long-term projections of retail needs are susceptible to numerous variations in the background assumptions. Given the advice provided by GVA regarding the dependency of growth on key assumptions concerning population change and income growth, regular monitoring of Visionary progress and other factors influencing need will be required and amendments made as necessary to long-term projections.

C3.32 Despite the potential to consider a range of assumptions about future market share for the Black Country the Consortium have applied a “one choice” approach to market share of retail turnover. There is ample justification for the Black Country centres to retain existing market share on the basis that RSS requires the sub-region to retain its population, and population growth and also reverse net out-migration to achieve net in-migration.

C3.33 This requires the maintenance of a competitive retail offer with vibrant and competitive centres capable of adding to the vital improvement in the area’s quality of environment, sufficient to reverse people’s previous incentives to move out of the area, and to provide exciting and vibrant centres for the whole community.

C3.34 It thus necessitates the opportunity for key centres to keep wholly up to date with changing retailer and consumer requirements, which often change rapidly.

C3.35 In this respect it is equally necessary that through major growth in these centres balance is retained between the Black Country and competing retail centres, notably Birmingham City Centre, that ensures compatibility of growth and the ability of the Black Country to match its population and employment growth strategy with retail and office growth commensurate with area needs, in social and economic terms as part of its urban renaissance.
The distribution of retail floor space growth

C3.36 The GVA Grimley Centres Report advised on the need to share out floor space growth amongst the selected key centres and also to provide a proportionate share of growth for smaller town and district centres.

C3.37 The GVA report suggested an indicative split of 50:50 between the four key centres and district centres.

C3.38 The Consortium considered, (having established the potential expenditure capacity) that the principle of growth being shared between key centres and other centres was a “constant” component of the Vision and thus not an area of choice.

C3.39 The issue of choice became one of identifying the relative positions of the four key centres in terms of a share of growth, and what proportion should be identified for smaller centres in order to maintain their vitality and viability.

C3.40 Thus, inter-authority working concluded upon a more appropriate split between the four key centres and between these and smaller town and district centres. This took account of existing commitments and the capacity of each strategic centre to accommodate potential additional retail growth, based on detailed capacity assessments, and the extent of commitments within district centres.

C3.41 The Consortium had concluded that Dudley town centre’s retail role would cease to grow beyond 2011 by reason of the close proximity of Brierley Hill/Merry Hill and the agreed strategy to focus the town centre on residential growth and heritage assets, without prejudicing the area’s important character as a sub-regional and regional centre for tourism. The limitations on physical capacity are set out in the report prepared by Dudley MBC.

C3.42 At an early stage, the GVA Grimley report had concluded that Brierley Hill/Merry Hill already performed a strategic retail, leisure and office roles should be enabled to grow and that there is “clear evidence to support further growth of this centre as part of a co-ordinated four centres strategy”. This should be subject to commitments to manage the scale and timing of additional development, appropriate transport infrastructure (particularly in public transport improvements) and phasing of growth to ensure compatibility with growth and continuing vitality of other Black Country centres needing regeneration.

C3.43 This reaffirmed the Consortium’s Vision for a centres strategy focused upon Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill, but ensuring that Dudley was to be promoted in a positive manner as a centre exploiting growth opportunities other than retail.

C3.44 The Consortium were mindful of the evidence needing to be assembled to demonstrate the strength of argument for including Brierley Hill/Merry Hill
not only as a strategic Black Country centre but also in the West Midlands Region’s portfolio of strategic town centres.

C3.45 Thus **further technical research** (*listed in Appendix A3*) was undertaken to consolidate the evidence base, including:

1. ‘*A report on the retail and office investment market opinion on the role and importance of Merry Hill and how far the other three Black Country Centres (and also Dudley) could fill the void if Merry Hill’s growth was stultified*’

C3.46 This report by Graham Chase and Partners confirmed that there was no market based choice and that Brierley Hill/Merry Hill must be enabled to grow, albeit conditionally if the Black Country is to maintain its market share.

C3.47 The report concluded that Wolverhampton, Walsall and West Bromwich possessed USPs and catchment areas that would enable them to grow their retail offer reflecting their own attributes and in different ways. Further that controlled growth at Merry Hill would complement and not prejudice renaissance of these centres.

C3.48 The report found that Dudley Town Centre lacked the investment potential for growth in retail beyond 2011 and that its changing role would complement that of Brierley Hill/Merry Hill.

2. ‘*A report on Merry Hill and market share*’

C3.49 White Young Green (WYG) were commissioned to assess the impact of no further retail growth at Brierley Hill/Merry Hill upon other Black Country centres and the sub-regions overall market share.

C3.50 This report\(^1\) has concluded for the Black Country Study Area (as defined through survey by the GVA Centres Study) that without Brierley Hill/Merry Hill or Dudley town centre expansion, the Black Country market share will be reduced from 47.5% to 41.8% by 2021. This total loss represents £5.02 billion in 2021. This scenario assumes the other three Black Country key centres do not absorb any of the growth (in essence do not increase their market share). Taking the Black Country administrative area, if all apportioned growth for Brierley Hill/Merry Hill were to be lost to centres outside the sub-region, the Black Country’s market share would drop from 71% to 61% by 2021, and assuming the other 3 key centres maintain their current market share.

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\(^1\) *Assessment of Future Market Shares and Accommodating Future Needs, White Young Green, May 2006*
As a variation, if the other 3 key centres absorbed the apportioned growth for Brierley Hill/Merry Hill on their existing properties of market share, than the drop in market share for the Black Country will be from 71% to 67%.

C3.51 Notwithstanding physical capacity, the report concluded that the three Ws as key centres would not be capable of accommodating both their own projected growth under the Vision, AND additional growth to compensate for the loss of Brierley Hill/Merry Hill, taking account of market and population catchment considerations.

C3.52 The report reflects the case for the Black Country maintaining its reasonable market share. Once the slack is taken up outside the area, the greater difficulty exists for the area to claw back trade to reasonable levels.

3. ‘A report on Merry Hill and its regeneration role’

C3.53 Regeneris were appointed to assess the impact of Merry Hill growth on regeneration in the Black Country and also at the local level.

C3.54 The report assessed the contribution Brierley Hill/Merry Hill has already made in the local economy including job provision.

C3.55 It concluded that as with Graham Chase and Partners report, Brierley Hill/Merry Hill is a catalyst for regeneration, job diversification, job creation to compensate for loss of jobs in manufacturing and to provide a link between office and new technology jobs and attraction/retention of A/B households.

C3.56 The Consortium has concluded that the technical evidence convincingly demonstrates the exclusion of Brierley Hill/Merry Hill as a key strategic centre is not an option. They felt obliged however to offer the choice of Brierley Hill/Merry Hill or no Brierley Hill/Merry Hill growth to the public in the consultation on choices and there was a large majority response in favour of its growth. The risk assessment (Section 5 addresses the implications of no further growth of this centre.)

The scale of office growth

C3.57 The report from GHK assessed the scale of "office" growth required to provide job diversification, new opportunities for Black Country people, skill development, compensation for loss of jobs in local manufacturing and contribution to sustainable homes/jobs balance in the Black Country.

C3.58 The job needs of the Vision were translated into office floor space requirements. These were reviewed by GHK as a partner with GVA Grimley in the Employment Land Capacity Study.
C3.59 The need for 79,000 net new “office” jobs are required to meet the Vision to 2031 and in this context, any reduction in this estimate is a “no choice” option.

C3.60 The strategy of sustainable “self-sufficiency” means that the Black Country must meet the challenge of a massive increase in office development if the job requirements are to be achieved. GHK and GVA Grimley have concluded as to the scale of the challenge, which at the least, includes reversing the market trend towards business parks on greenfield sites (which are outside the Black Country), and also overcoming the current lack of interest from the market for most town centre locations.

The distribution of office growth

C3.61 The Vision for the scale of projected and required office growth has been considered by the Consortium in terms of its spatial distribution.

C3.62 The Consortium has concluded that there is no choice other than to accommodate office growth primarily in the four key centres.

C3.63 A key-centres focus reflects Government policy to concentrate office development in town centres under PPS6 and as the most sustainable location, combining offices with other town centre uses – retail, homes, leisure and potentially further and higher education and administration.

C3.64 The Choices Consultation offered to the public a series of choices on office distribution.

C3.65 The location of offices is a growing issue in the fulfilment not only of Black Country but Regional Strategy. Office growth in recent years within the sub-region (and the whole Region to a greater extent) has taken place in greenfield business parks, with little centres office growth other than Birmingham City Centre. The planning restriction since 1995 on retail growth at Brierley Hill/Merry Hill which had a detrimental effect on office investment and occupier confidence in that centre. Brierley Hill/Merry Hill one of the West Midlands largest office focuses.

C3.66 Thus the potential to achieve a centres focused office strategy in the Black Country, and at the scale proposed, relies heavily on a regional consensus to restrict greenfield office development within and beyond the Black Country itself.

C3.67 The areas of Black Country choice have been, firstly, the distribution of office growth between key centres, and secondly, allowance for smaller town and district centres and public transport interchanges. The initial apportionment growth between the four key centres on a 25:25:25:25% basis allows for all four centres to grow (B1)a office employment in accordance with PPS 6. It is expected that a small proportion of growth may in due course be identified through LDDs for district centres and key public transport interchanges.
Transport

C3.68 The Vision recognised the seamless relationship between land use change and transportation interventions both to support land use transformation and provide wider sustainable benefits of efficient travel across the Black Country and its links to Birmingham and a wider hinterland. Early work evaluated the transport impact of more than thirteen different land use scenarios for the Black Country.

C3.69 The Vision identified relief of congestion and modal shift towards public transport as key basic and essential requirements to enhance sustainability in the sub-region. The Local Transport Plan has focused its package of resource bids in this direction with a 5 year programme of work from 2006-2011. This was based on existing land uses.

C3.70 A Metropolitan-wide transport model called PRISM has been used to assess the impact of Potential Directions of Change on the existing transport network and to identify areas where additional interventions are needed to meet the Vision objectives. In line with the Spatial Choices Consultation a concentration of development in areas served by a range of public transport produces the most sustainable travel patterns. A corridor and centres based strategy was identified as being the Potential Direction of Change that could produce the most sustainable transport outcome.

C3.71 The latter phases of the Black Country Study Transport work have focused upon an evaluation of the role of the existing and planned transport networks in relation to the emerging Preferred Land Use Strategy. Transport investments proposed in the Plans of the West Midlands Authorities have been evaluated to see if the Black Country Study Vision can be met through this investment.

C3.72 When this was done a number of key areas were identified where further investment was needed. The identification and evaluation of this further investment forms the final stages of the transport part of the Study. The interventions that have been identified now form an integrated strategy for the Black Country. The proposed changes to the RSS T12 are needed to help secure the delivery of two of the key features of the proposed strategy, that is the completion of the Midland Metro network and improvements to motorway junctions.

C3.73 The impact of this shortfall in investment would be to limit the opportunity for people to travel by public transport and to reduce the attractiveness of areas identified for employment growth.

Presentation of choices for consultation

C3.74 Consultation on choices is a statutory requirement of the draft RSS Revision process, and was conducted for an 8-week period during November 2005 to January 2006.

C3.75 The choices document sought to inform the consultees upon outputs from technical evidence and to identify key issues around which choices
C3.76 The process set out the broad directions of spatial changes which had been identified with discreet differences as to the focuses for land use change and their implications.

C3.77 All the spatial directions of travel were shown to be capable of achieving Vision objectives but in different ways and with different consequences. Doubts were cast as to the effectiveness in relative terms of a choice which was largely founded upon maintaining a pattern of uses based on past trends, including retention of much of the existing employment areas, and with new housing distribution over a wider and less focused area than in the “centres” and “corridors” options.

C3.78 This was referred to as “planned dispersal”. The other directions/emphases were; a relative focus on “centres”, and upon “corridors of growth” to accommodate change.

C3.79 The information pack including a sustainability appraisal of choices was circulated to 5,000 individuals and organisations from the database and others on request. A further 2,000 packs were sent to libraries, local authorities etc and 2,000 summary leaflets sent to learning centres throughout the Black Country.

C3.80 280 responses were received to the questionnaire and by letter (or both). Responses came from residents (17%), business organisations and professionals (29%), Government agencies (6%), national and regional organisations (5%), local authorities (9%), MP’s/MEPs/Councillors (6%), and community/interest groups (25%). Responses were also broken down to identify in more detail the source of responses and views of specific groups (e.g. Sandwell responses) or interests (e.g. house builders). A series of local events (one in each borough) were organised to seek to engage local people.

The responses

C3.81 In numerical terms the level of response was disappointing, but reasonable endeavours had been made to encourage response over a broad spectrum of community interests.

C3.82 **Key conclusions** for the process of Consultation on Choices included:

- A general support for the Vision objectives.
- A general preference (where opinion was provided) towards a direction of change which combined corridors of public transport and growth in key centres.
- Support for Brierley Hill/Merry Hill growing and becoming a
recognised strategic centre, but with caveats to ensure growth did not prejudice regeneration of other centres.

- Support for Dudley town centre retaining a modified future role.
- Support for a relative focus of retail and office growth upon the four key centres of Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill but with improved public transport access and accessibility.
- This support was allied to the need to share growth with smaller Black Country Centres whose local community role needed to be protected and consolidated.
- Support for major growth in office jobs in the Black Country; that the key centres were preferred as a focus for office development but that smaller centres and public transport interchanges also required a share of growth.
- Support for providing quality employment locations close to the motorways, served by public transport and where practicable, rail links.
- Recognition of the need for new technology industries.
- Recognition of the need to recycle poor quality industrial land for housing.
- The need to accommodate logistics activity in the Black Country, but also support for large scale Regional Logistics Site in the North Black Country/Southern Staffordshire area.
- Support for growth in housing with higher densities selectively in town centres and at public transport interchanges. New housing areas needed good cycle and pedestrian access to public transport.
- Concern at suburban intensification and the need to transform previous municipal housing estates.
- Strong support for extending the Metro system and improving heavy rail services.
- Support for a new internal strategic route through the Black Country.
- Overall environmental quality is a key issue.
- Environmental priorities should be existing housing areas and town centres.
• Whilst the need for housing growth was ratified, this should not be at the expense of sufficient land being retained to expand job provision and opportunities in the area.

C3.83 The emerging strategy sought to accommodate and reflect the general preferences reflected in the choices responses.
C4  THE PREFERRED STRATEGY

C4.1 The Black Country Consortium have made rapid progress over the last three years in formulating a strategy which will deliver the Black Country Vision. What has become evident is the scale and importance of the challenge; the vision will only be achieved by fundamentally changing the approach to providing the opportunities to live, work, learn and move within the Black Country. If agencies actions are insufficient to meet the challenge, trend-based forecasts predict a widening of the gap with more prosperous UK and European counterparts.

C4.2 The evidence for conclusions is based on a series of technical reports commissioned on the economy, town centres, housing, education, the environment and transport. The Consortium also commissioned a report on the role of diversity in the present and future Black Country society, which drew upon the evidence of these technical reports and experience elsewhere. Each of these studies analysed the Black Country’s position today and identified the key interventions required to meet objectives for 2033. They have reinforced belief that many of the challenges facing the Black Country are interlinked and highly complex, meaning that intervention in one area can be far-reaching, but also dependent on success in another.

C4.3 For example, to stem the loss of retail expenditure, the public realm in town centres must be improved to make them attractive places to shop. Improving the public realm will also encourage more knowledge-based industries to locate in centres and persuade more people to live there, thus fuelling further expenditure. At the same time, all these outcomes are dependent on vastly improved access to the town centres, high quality homes where people can live, and an economy which is creating well-paid office jobs. These interdependencies have convinced the Consortium that the holistic approach adopted is the optimal way forward.

Accelerating Growth of the Knowledge Economy

C4.4 The Strategy starts with the economy in recognition of its vital role underpinning many of the objectives; without a prospering modern economy generating high value-added employment, the Black Country cannot expect to raise incomes or grow the population. The key challenge is for the Black Country to move from a comparatively low skilled, low income economy where comparative advantage in manufacturing is fading, to a high skilled, well-paid knowledge economy where the service sector is expanding.

C4.5 The Economic Study (GHK/OEF) identified opportunities for growth in financial and business services, high value logistics, and high tech manufacturing in the Black Country. As many as 160,000 new jobs (gross) will be required in these sectors over the next 30 years. This scale of growth, and the level of restructuring it requires, has profound implications. To begin with, a major overhaul of land use and transport structure to create modern, fit for purpose, employment sites; there is a need to
retain and improve 2,200 hectares of employment land of which at least 1,600 hectares must be transformed into competitive, high quality, well-serviced and accessed sites required by modern industry. In addition, a much more highly skilled, entrepreneurial workforce is needed; a high quality environment to attract world class, innovative companies and their employees; and a better choice of housing including more homes suitable for higher income groups.

C4.6 If these challenges are met, the Black Country Consortium can expect to see more knowledge-based companies choosing to relocate or to start life in the Black Country. Where will the Black Country’s new companies be located in 2031? First, four key corridors are identified with concentrations of high quality employment sites most suited to high tech manufacturing and technology parks. The location of these ‘investment corridors’ is shown in Section D1, Map D1; this also highlights areas with fast and efficient access to the motorway network suitable for logistics.

C4.7 Second, and most crucially, the majority of office based companies should establish in the town and city centres. The four Strategic Centres will lead out the economic competitiveness of the future Black Country. This is part of wider strategy to bring renewed vibrancy and urban renaissance to the Black Country. Only by creating vibrant, well-connected town centres where people choose to work, live and visit, will the trends of population out-migration and decentralisation be reversed.

Expanding Four Strategic Town and City Centres

C4.8 By 2021, the four town and city centres will be fuelling the growth of the Black Country; providing high quality office space for knowledge-based companies, and vastly improved retail, sport, leisure and tourism offers. New homes supporting ‘city living’ and a higher quality public realm will bring more people into these centres, adding to the level of economic activity.

C4.9 The Black Country Centres Study indicates that the four centres with the greatest capacity for growth are: Wolverhampton, Brierley Hill/Merry Hill, West Bromwich and Walsall. While still an important centre for the Black Country, Dudley Town Centre has seen its strategic role diminish and its capacity for expansion without damaging the local heritage and environment is limited. Dudley will be repositioned to focus on residential and tourism growth. In contrast Brierley Hill/Merry Hill has become one of the most important retail and office locations in the Black Country. Further expansion has the potential to act as a catalyst for growth, and it should therefore be recognised as a strategic centre.

C4.10 All of the four strategic centres will need to expand beyond their current boundaries if they are to fulfil growth ambitions. In terms of the scale of development, the target to 2031 for 378,000 sq.m of additional comparison retail floorspace. 75% will be distributed across the four strategic centres and the rest between smaller centres. With respect to office space, 1.45 sq.m of net additional space is needed by 2031 to support the aspiration for 101,000 more jobs in the service sector. Of this
figure for 2031, 1.3m sq. m. will be located in the four key centres, accommodating 71,000 service sector jobs (748,000 sq. m. and 41,000 jobs at 2021). Strategic Centres should also provide a focus for sport and leisure development of a scale to meet the needs of +1m people and support the attractiveness and competitiveness of the wider city region.

C4.11 Reflecting the key role the strategic centres play in the Strategy, they will be priority areas for immediate investment. Three of the four strategic centres already have or are actively preparing masterplans; key schemes within these must be implemented with speed and ways established as to how further growth can be accommodated. In doing so, the centres – the places that local people identify with the most – will be areas where the early transformation of the Black Country is most visible.

**Building A High Quality Housing Market**

C4.12 The Black Country housing market does not sufficiently meet the needs of local people; insufficient private and social housing, low-grade residential environments and a lack of choice, are all contributing to out-migration. Strategy aims to overturn this trend, starting from the basic premise to **accelerate the rate of house building and home improvement**, and ensure that new homes and residential environments provide greater quality and choice.

C4.13 Since 1990, house building has fallen behind household formation for the first time in the post-war period. By 2031, this trend will have been overturned, creating a total of 71,000 additional households and raising population by 125,000 (For 2021, 44,000 households and 61,000 people are proposed). Achieving this scale of housing growth will require a significant change in the pattern of land use; old industrial areas will need to be redeveloped to create new housing environments. Informed by the Housing Capacity Study it is estimated that up to 1,700 ha of currently designated employment land will need to be converted to residential use by 2031 (c1,100 ha by 2021).

C4.14 All new and existing residential areas in the Black Country need to be within sustainable communities; by this it is meant ensuring they provide access to employment, local services, retail, leisure and a high quality environment. In line with this approach, **strategic centres** and nodes along **public transport corridors** provide opportunities for higher density housing development within walking distance of stations and Metro halts (**see Section D3**). These new residential areas should offer a more diverse range of housing types and densities. In particular, more quality, mid and upper market homes are needed for higher income and highly skilled households, currently leaving the Black Country to find such homes elsewhere.

C4.15 Finally, housing market studies have identified the need to prepare a major **programme of progressive renewal** to raise the quality of homes and residential environments across the Black Country. Many of the worst affected housing areas are in the most deprived core of the Black Country, of which many are monolithic, sometimes isolated, council estates,
stigmatised as undesirable places in which to live and where homes often do not meet the decent homes standard. Many BME communities are housed in older mixed residential and industrial areas around Centres. These localities are popular as being accessible and providing a rich concentration of community facilities. However, they offer poor quality housing with limited choice and overcrowding. These areas too should be subject to progressive renewal to provide greater quality and choice.

C4.16 Such programmes of progressive renewal will require sensitive implementation working closely with the diverse range of existing communities, together with the creation of new residential environments from former industrial land, thus providing more space and choice for these communities.

Creating a Workforce for the 21st Century

C4.17 Economic strategy for the Black Country aims to create a more diverse, knowledge-intensive economy with higher average incomes. This can only be delivered with a highly skilled workforce. The Black Country Study’s Education and Skills Plan aims to raise the skill levels of the adult workforce and of children and young people. Existing communities provide tremendous potential for growth in the competitiveness of the Black Country. The current waste of talent arising from poor educational and skill attainment, poor health and other barriers to opportunity must be eradicated. In addition, by creating a more upmarket housing stock, improving the environment, and by creating better-paid jobs, the Study aims to attract more highly skilled people to the sub-region and to retain those who currently leave.

C4.18 The Black Country Education and Skills Plan is embedded into all Community and Education Plans. In terms of immediate action, prioritising investment in Colleges is under way to add to the knowledge-base of the strategic centres. Wolverhampton University has a key role to play, especially in developing its research base and enabling it to attract more students from outside the sub-region. Creating more extensive research and development capability in businesses, the University, Colleges and in new facilities and institutions forms a key strand of Preferred Strategy.

Creating Prosperous, Diverse and Harmonious Communities

C4.19 Integral also to the economically driven strategy is the need for upskilling and economic participation to be achieved throughout the diverse communities which choose to live in the Black Country. Creating successful communities, eradicating poverty, enabling participation in social and economic life, and building a harmonious society are integral activities within the preferred strategy to achieve the Black Country Vision.

C4.20 The diversity of communities provides a wide range of opportunities which will be encouraged as an engine of economic growth. This will only be achieved if barriers to equality are removed and structural inequality is addressed. A workstream is being developed which will specifically address issues of diversity, social cohesion and poverty. The establishment of a
partnership with government will be explored to examine, from the perspective of each diverse community group, each of the themes and action plans which make up preferred strategy to achieve the Black Country Vision. This is not just a BME issue. It affects all communities, particularly those which are becoming alienated through deprivation and increasing divergence of economic opportunity and performance. The aim is to develop a strategy to tackle structural inequality in the fields of education, housing, labour market, health, policing and the criminal justice system, and to put in place positive measures to create the social conditions which will bring communities together through an equal sense of belonging and enable people to maximise their potential. Communities will be genuinely inclusive and integrated in residential, social and economic terms.

**Transforming the Environment: Black Country as Urban Park**

C4.21 Creating a high quality sustainable environment is one of four key objectives. The need for radical change has been identified in both the Economic and Housing studies. High quality urban, residential and working environments will be critical for attracting knowledge-based industries and their workers.

C4.22 ’Black Country as Urban Park’ is the strategy to transform the environment. It identifies the opportunities to make the Black Country a national exemplar for urban living and sustainable urban renaissance. In doing so, the Black Country is of sufficient size to make a major contribution to national sustainability targets, such as on carbon emissions. The sub-region has many environmental assets including its canals, geology, wildlife and open spaces, but too many are hidden or inaccessible. These assets must be made more use of; in particular, ’Black Country As Urban Park’ aims to highlight the area’s distinctive topography, communities and connections.

C4.23 The Urban Park Design Study has identified three principle design layers which will be used to guide future development. First, beacons to highlight most distinctive characteristics of the Black Country; these might include physical objects such as sculptures and buildings or flagship events and festivals. Second, corridors for sustainable movement around the Black Country using environmental assets, including canals, walkways and cycle routes and encouraging physical activity. Third, the environment within communities – emphasising past and future community areas by their distinctive character.

C4.24 A Black Country Landscape Action Plan will define the physical form of the Black Country in accordance with the ‘Urban Park’ principles of Beacons, Corridors and Communities. It will provide the framework for driving the transformation of the environment across the Black Country changing its image and legibility, building on existing natural, built and heritage assets. Implementation of the Landscape Plan will underpin the creation of new residential environments and employment land investment for knowledge-led business.
Developing an Integrated Transport Network

C4.25 An efficient transport system is essential to ensure the free flow of people, goods and services across the Black Country. Transport Strategy outlines the vision for a new integrated public transport system to underpin the polycentric network of centres. 'Black Country Express' will revolutionise the way people travel between centres and outside the Black Country, by providing integrated bus, Metro and rail services. It is considered the only practicable way of delivering the bus component of the integrated transport system through Quality Bus Contracts with a franchising system similar to that operating in London. One of the flagship projects of Black Country Express will be an extended Metro network, linking the Black Country’s communities together and to Birmingham.

C4.26 Transport Strategy identifies the priority highway/junction investments to support land use transformation, economic and household growth. The core objective will be to unlock economic growth; either by enhancing the existing network, creating new roads and junctions to release new employment land, or reinforcing the economic vitality of key centres.

C4.27 To achieve the best use of existing strategic highway network, a widespread application of Red Routes, decriminalised parking enforcement and improved urban traffic control is proposed.

C4.28 Key investments are highlighted to improve external connectivity to UK, European and Global markets. For example, to ensure there is capacity for fast and reliable access to Birmingham International Airport, City Region and the rest of the UK and better local services within the Black Country, four tracking the mainline railway from Wolverhampton to Birmingham and Coventry is needed.

Summary of the Preferred Spatial Strategy for the Black Country to 2031

C4.29 The spatial strategy for the Black Country proposes to achieve the Black Country Vision to 2021 for sustainable growth and competitiveness focused on development on Centres and Corridors. This direction will be further reinforced towards 2031 and beyond. The Strategy proposes a 100% Brownfield land development pattern which aims to protect the existing Green Belt within the Black Country. Its key proposals comprise:
The Black Country Spatial Strategy - Centres:

- **Focus of retail (comparison goods ie non-food) and office growth**, coupled with leisure and the development of ‘city living’, on four Strategic Centres in the Black Country operating as a network connected to each other and to Birmingham.

- The **four Strategic Centres** for growth and expansion will be:
  - Wolverhampton City Centre.
  - Walsall Town Centre.
  - West Bromwich Town Centre.
  - Brierley Hill/ Merry Hill.

- Through the Phase One Review of Regional Spatial Strategy the designation of Brierley Hill/Merry Hill as a new Strategic Centre, will replace Dudley Town Centre which will, however, have an important future role based on tourism, its cultural assets and residential development.

Corridors for Housing Growth:

- To achieve the house building minima targets set out in RSS, housing growth in the Black Country will be focused on **Public Transport Corridors** with concentrations within walking/cycling distance of railway stations, metro halts and existing local centres. The primary provision of land for housing growth will come from the restructuring of poorer quality employment land for residential led mixed development with encouragement given to higher housing densities close to key public transport interchanges, and opportunity to accommodate a wider mix of housing types including homes to meet the needs of higher income and higher skilled households.

- These **Corridors will be developed as a network** connecting the Black Country Strategic Centres to each other and to Birmingham City Centre along existing passenger rail lines, existing and planned Metro network and in other areas with opportunity for residential growth arising from employment land restructuring (where the provision of high volume public transport will be essential)
Other Centres:

The strategy also recognises that, to support sustainable growth, development and environmental enhancement should also be provided for:

- Supporting the retail and leisure role of the network of existing local centres serving local communities, accessible by public transport.

C4.30 The RSS Phase One Revision submission proposes policy changes to set the strategic planning framework to facilitate the implementation of this strategy primarily in the form of additional Urban Renaissance policies specific to the Black Country.

C4.31 The broad distribution and scale of growth and land use change in the Black Country to 2021 and 2031 proposed through this strategy is set out below:

Table C4.1. Preferred Spatial Strategy: Scale of Growth
### NEW HOMES:

<table>
<thead>
<tr>
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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tbody>
<tr>
<td>Strategic Centres</td>
<td>5,500</td>
<td>7,700</td>
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<td>Public Transport Corridors</td>
<td>30,100</td>
<td>53,900</td>
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<td>Other (e.g. commitments, intensification)</td>
<td>8,500</td>
<td>10,100</td>
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<tr>
<td><strong>Total New Homes</strong></td>
<td><strong>44,100</strong></td>
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### Additional A/B households to be accommodated

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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td></td>
<td>32,000</td>
<td>50,000</td>
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### EMPLOYMENT:

#### New Jobs

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<th>2001 to 2031</th>
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<tr>
<td>Strategic Centres</td>
<td>45,500</td>
<td>76,700</td>
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<tr>
<td>Employment Land Investment Corridors</td>
<td>*21,700</td>
<td>*49,800</td>
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<td>Other (Local Centres, off-Centre Commitments, Employment Opportunity Areas)</td>
<td>12,800</td>
<td>34,300</td>
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<tr>
<td><strong>Total New Jobs</strong></td>
<td><strong>80,000</strong></td>
<td><strong>160,800</strong></td>
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* includes 7,000 planned commitments on periphery

** Net new jobs accommodated after allowing for manufacturing restructuring

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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td></td>
<td>65,000</td>
<td>95,000</td>
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### LAND IMPLICATIONS:

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<th>2001 to 2031</th>
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<tr>
<td>Transfer of Employment Land to Residential led Mixed Use</td>
<td>-1,100ha</td>
<td>-1,700ha</td>
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<tr>
<td>Retained Employment Land</td>
<td>2,800ha</td>
<td>2,200ha</td>
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<tr>
<td>Provision o High Quality Employment Land</td>
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<td>1,600ha</td>
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### NEW FLOORSPACE BUILT:

#### Offices:

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<th>2001 to 2021</th>
<th>2001 to 2031</th>
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<tr>
<td>Strategic Centres</td>
<td>0.75m m²</td>
<td>1.30m m²</td>
</tr>
<tr>
<td>Other (incl commitments)</td>
<td>0.12m m²</td>
<td>0.15m m²</td>
</tr>
<tr>
<td><strong>Total Offices (B1a &amp; A2):</strong></td>
<td><strong>0.87m m²</strong></td>
<td><strong>1.45m m²</strong></td>
</tr>
</tbody>
</table>

#### Retail:

<table>
<thead>
<tr>
<th></th>
<th>2001 to 2021</th>
<th>2001 to 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Centres</td>
<td>0.19m m²</td>
<td>0.28m m²</td>
</tr>
<tr>
<td>Other Centres</td>
<td>0.05m m²</td>
<td>0.10m m²</td>
</tr>
<tr>
<td><strong>Total Retail (A1):</strong></td>
<td><strong>0.24m m²</strong></td>
<td><strong>0.38m m²</strong></td>
</tr>
</tbody>
</table>
D KEY GROWTH PROGRAMMES

D1 ACCELERATING GROWTH OF THE KNOWLEDGE-BASED ECONOMY

THE BLACK COUNTRY ECONOMY TODAY

D1.1 In the mid 19th Century, at the height of industrial revolution, the Black Country was one of the leading sub-regional economies in Britain and Europe. Discoveries of large deposits of coal and limestone led to the emergence of world class mining and manufacturing industries. People flocked to work in the factories, workshops and mines, creating thriving urban centres. The growth and expansion of these industries continued to serve the area well into the latter half of the 20th Century.

D1.2 Since 1970, de-industrialisation has seriously eroded the Black Country’s economic position. The traditional heavy industries which were once the engines of growth in the local economy, have largely disappeared. Today, the Black Country economy employs 500,000 people - approximately 20% of the West Midlands total – yet some 200,000 manufacturing jobs have been lost over the last 30 years. As a counterbalance, job creation in other sectors has generated an additional 95,000 jobs but the net effect is approximately 100,000 fewer jobs than in the 1970s.1

Figure D1.1: Employment in the West Midlands, 1971-2001

Source: GHK, 2005

1 Unless otherwise stated all figures are derived from the GHK Economic Modelling Work. The Long Term Economic and Employment Strategy for the Black Country, GHK, February 2005.
D1.3 Unsurprisingly, the area suffers from above-average unemployment. Claimant unemployment in the Black Country is 5.5% compared to the GB average of 3.1%. Similarly, the employment rate in the Black Country is 70% compared to the Government’s national target of 80% - that of London and the South East.

Table D1.1: Black Country Employment and Unemployment Rates 2004(%)

<table>
<thead>
<tr>
<th></th>
<th>Employment Rate (%)</th>
<th>Unemployment (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dudley</td>
<td>76.2</td>
<td>4.0</td>
</tr>
<tr>
<td>Sandwell</td>
<td>66.1</td>
<td>6.6</td>
</tr>
<tr>
<td>Walsall</td>
<td>70.7</td>
<td>5.1</td>
</tr>
<tr>
<td>Wolverhampton</td>
<td>66.9</td>
<td>6.9</td>
</tr>
<tr>
<td>Black Country</td>
<td>70.3</td>
<td>5.5</td>
</tr>
<tr>
<td>City Region</td>
<td>71.3</td>
<td>5.0</td>
</tr>
<tr>
<td>West Midlands</td>
<td>73.5</td>
<td>4.0</td>
</tr>
<tr>
<td>England</td>
<td>74.6</td>
<td>3.0</td>
</tr>
<tr>
<td>Great Britain</td>
<td>74.4</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Source: Annual Population Survey
Notes: Unemployment rate = claimants as % of economically active population.
Employment rate = % of working age population in employment.

D1.4 The impact of deindustrialisation has been far-reaching, leaving a legacy that has affected the physical, economic and social make-up of the Black Country. The area is left with a tradition of world-class performance in manufacturing; the Black Country is home to nationally and internationally renowned manufacturers such as Hadley Industries plc (steel rolling), Astec International Holdings Ltd (electronics), WYKO Holdings Ltd (precision engineering) and Boparan Holdings Ltd (food). These companies and other manufacturing firms still account for 20% of employment in the Black Country compared to 12% for England.

Table D1.2: Black Country employment by sector (%) 2004

<table>
<thead>
<tr>
<th></th>
<th>Dudley</th>
<th>Sandwell</th>
<th>Walsall</th>
<th>W’ton</th>
<th>Black Country</th>
<th>City Region</th>
<th>West Mids</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>16.8</td>
<td>23.7</td>
<td>22.9</td>
<td>16.8</td>
<td>20.1</td>
<td>18.2</td>
<td>16.6</td>
<td>11.9</td>
</tr>
<tr>
<td>Construction</td>
<td>6.8</td>
<td>4.4</td>
<td>4.7</td>
<td>5.6</td>
<td>5.4</td>
<td>4.3</td>
<td>4.3</td>
<td>4.4</td>
</tr>
<tr>
<td>Distribution</td>
<td>27.4</td>
<td>25.4</td>
<td>23.7</td>
<td>25.3</td>
<td>25.5</td>
<td>24.4</td>
<td>24.8</td>
<td>24.9</td>
</tr>
<tr>
<td>hotels &amp;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>restaurants</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport and</td>
<td>3.8</td>
<td>5.8</td>
<td>5.5</td>
<td>4.9</td>
<td>5.0</td>
<td>5.0</td>
<td>5.4</td>
<td>6.0</td>
</tr>
<tr>
<td>comms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Banking</td>
<td>16.0</td>
<td>11.8</td>
<td>16.8</td>
<td>14.1</td>
<td>14.6</td>
<td>18.1</td>
<td>17.3</td>
<td>20.6</td>
</tr>
<tr>
<td>finance,</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>insurance etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public admin.</td>
<td>24.0</td>
<td>23.7</td>
<td>21.2</td>
<td>30.0</td>
<td>24.6</td>
<td>25.5</td>
<td>25.8</td>
<td>25.8</td>
</tr>
<tr>
<td>edn. &amp; health</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other services</td>
<td>4.6</td>
<td>3.8</td>
<td>5.0</td>
<td>2.9</td>
<td>4.1</td>
<td>4.0</td>
<td>4.5</td>
<td>5.1</td>
</tr>
<tr>
<td>Total</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: ABI (Black Country Observatory)
D1.5 At the same time, the decline of industry has left excessive amounts of poor quality industrial land - often contaminated - creating an environment unfit for the needs of business in the 21st Century. As a consequence, demand for quality land and premises outstrips supply, leading to excessive dependence on quality sites outside the Black Country (e.g. Hilton Cross and Featherstone).

D1.6 As major industries have closed or moved to lower cost locations abroad, the performance of the Black Country economy has faltered. If the Black Country had grown at the same rate as the national economy over the period 1991-2002, an additional 42,000 jobs would have been created. The reality is that only 7,000 jobs were created. What happened?

D1.7 The Black Country has been over-dependent on sectors experiencing relative decline in the UK economy, predominantly in manufacturing, for example automotive manufacture as illustrated by the relationship to the Black Country of the closure of MG Rover in 2005 (1,300 people, a quarter of the workforce, lived in the Black Country and 34 Black Country companies supplied MG Rover – indeed 5% of Black Country employees work in companies in the automotive supply sector alone). The corollary is that it has failed to sufficiently attract as replacements those knowledge-based sectors driving the UK economy today, such as financial and business services and ICT.

D1.8 Figure B2.3 in Section B2 (paragraph B2.12) maps the density of knowledge workers in the Black Country by ward compared to the surrounding area; the darker colours illustrate higher concentrations. The map provides stark illustration of the scarcity of knowledge workers in the Black Country. Reliance on poorly performing industries is estimated to have cost 21,000 potential jobs.

D1.9 A further 14,000 potential jobs are estimated to have been lost through poor productivity performance. In other words, the Black Country’s economic weakness is not simply due to a disadvantageous economic structure, but also because each sector under-performs, highlighting the generic weakness in skills and competitiveness of the economy.

D1.10 In terms of the impact on Gross Value Added (GVA), a £2.6bn output gap exists between the Black Country and the rest of England (see Appendix A2). This can partly be attributed to the weak job creation outlined above but is also the result of low skill levels and weak business formation rates.

D1.11 The number of VAT registrations per 10,000 population is 24 in the Black Country compared to 32 for England. The means there are 855 less businesses starts in the Black Country each year compared to the

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3 Knowledge workers are defined as those employed in occupational grades: Managers and Senior Officials; Professional; and Associated Professionals and Technical.

4 Small Business Service (SBS), 2005.
national average. As the analysis in Appendix A2 illustrates this contributes nearly 40% of our £2.6bn productivity gap.

D1.12 The proportion of the population with degree level qualifications (NVQ Level 4) in the Black Country is 17% compared to 25% in England. This equates to 52,000 fewer people with degrees in the Black Country, accounting for £0.8bn of the output gap. (Appendix A2).

THE SCALE OF THE CHALLENGE

D1.13 Our headline economic objective is to raise income levels in the Black Country to 90% of the UK average by 2031; this is equivalent to the UK average outside London and the South East. We set a target for income because it relates to the wellbeing of local people as well as to the performance of the economy. Relative incomes are currently just 81% of the UK level. If current trends continue, the earnings gap will widen further to 76% of the UK average by 2031.

Figure D1.3: Trends in Relative Earnings

D1.14 The Consortium instructed consultants GHK to model how to reach the target given the baseline economic position and forecast trends. In other words, what the Black Country economy would look like in 2021 and 2031 if incomes were on a par with the rest of the UK excluding London and the South East. This aspiration equates to 87% UK average in 2021 and 90% in 2031.

D1.15 The consultants identified four fundamental layers of change to achieve the transformation. These four layers form the core of the Black Country Economic Strategy:

1) Reverse population decline;
2) Diversify the economy (attract more knowledge-based industries);
3) Change the occupational structure (create more senior and professional occupations); and
4) Upgrade the skills of the workforce;
D1.16 **Figure D1.4** models the cumulative impact of each layer on average earnings in the Black Country economy over the next 30 years. These projections are built from a ‘business as usual’ scenario where the new housing proposed under RSS does not happen. The model shows that population growth (Layer 1) and structural employment change (Layer 2) make little difference to relative earnings alone and will fail to reverse decline. Only with the addition of occupational change (Layer 3) and skills upgrading (Layer 4) will the income target be achieved.

**Figure D1.4: Impact on average incomes of economic strategy ‘layers’**

![Graph showing cumulative impact of economic strategy layers on average incomes](image)

Source: GHK, 2005

D1.17 Thus, the key conclusion is that only by achieving **change in all four layers together** will the income target be achieved. The scale of the challenge ahead at each layer is discussed in more detail below.

**Economy - Layer 1: Population Growth**

D1.18 There are very few examples of local economies experiencing economic growth while population is declining. The more talented people that leave the area, the more income, expenditure, and employment leaks out of the Black Country.

D1.19 Population growth has the effect of inducing additional employment in a number of local service sector industries, which are driven by population size, consumer expenditure and total employment. To calculate local services...
employment, the model uses population projections derived from housing targets in the Regional Spatial Strategy.

D1.20 Figure D1.4 shows that the new jobs derived through population growth per se will do little to change the occupational mix since few will be in higher earning, managerial and professional occupations. Thus, there will be little impact on residents’ relative wages.

**Economy - Layer 2: Structural Change: Attracting knowledge-based Sectors**

D1.21 Building on population growth, the second layer models the impact of structural change. The Black Country needs to be able to provide high value, knowledge-based employment for the Black Country’s enlarged population. To do so, we must diversify our economy, embracing those high value-added sectors, particularly in the service sector, which are currently under-represented.

D1.22 The Economic Study estimates the need to create a total of 160,000 gross new jobs by 2031 to achieve our growth aspirations, 94,000 net after accounting for a loss of 66,000 jobs in manufacturing. As many of these new jobs as possible need to be in highly skilled, well-paid industries. Comparable figures for 2021 are 105,000 gross, 52,000 net.

D1.23 98,000 new jobs will be required in services – in sectors such as financial and business services, communications and public administration (61,000 by 2021); plus 16,000 will be needed in logistics (10,400 by 2021) and a further 8,000 in retail (5,600 by 2021). In manufacturing we will retain and attract as many high value companies as possible, whilst managing the inevitable decline in total jobs. Manufacturing will remain an important part of the Black Country economy with at least 47,000 jobs in 2031 (61,000 by 2021). The remaining 40,000 jobs (28,000 by 2021) to achieve our target will be filled by local population serving employment in sectors such as health, education and personal services.

D1.24 Returning to *Figure D1.4*, while attracting new industries to the Black Country is essential, it will not be sufficient to raise income levels. For example, new service sector based activity may only provide low skilled, low paid employment, but also we need our new industries to provide more senior, highly skilled, well-paid occupations. For example, in the case of administration jobs, higher level occupations would be required as well as of back-office activities.

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Economy - Layer 3: Occupational Change: More Managers and Professionals

D1.25 This Layer models an uplift in the proportions of managers and professionals in the Black Country while retaining the sectoral mix in Layer 2. The model suggests a 15% increase in the proportion of managerial and professional jobs is required compared to the baseline. Unsurprisingly, the change in occupational structure improves wage levels quite significantly, as illustrated in Figure D1.4. This in turn will raise consumer spending and create additional employment. The future Black Country economy in 2031 should have 66,000 (+41,000 by 2021) more knowledge-based jobs, i.e. managers, professional and associate professionals.

Economy - Layer 4: Upgrading the Skills of the Workforce

D1.26 The final layer estimates the change in skills and qualifications needed to underpin wage growth in each occupation and sector. To illustrate, Figure D1.5 shows the relationship between the proportion of graduates and average wages across the main labour markets of the UK. The Black Country boroughs have among the lowest percentages of graduates in their workforces of any UK area.

Figure D1.5: Graduate: Earnings Relationship in UK Labour Markets

![Figure D1.5: Graduate: Earnings Relationship in UK Labour Markets](image)

Source: GHK, 2005/ NES 2003, Census 2001

D1.27 Section D5 outlines the plans for addressing the education and skills challenges in the Black Country. The required increase in skills according to GHK is equivalent to raising the share of graduates in the workforce from 12% to 16%. Only by securing this final layer of change will we succeed in achieving our earnings target. This skill enhancement though has to be across the board – the Economic Study suggests that, if the Black Country presented skill levels equivalent to the national average, then 100,000 more people should have obtained some form of qualification who currently have not done...
so and 60,000 more Black Country people would have a degree or equivalent qualification. (Census 2001/GHK 2005). If the Black Country economy is going to generate the incomes aspired to in the Black Country Vision, this scale of skill enhancement will need to be achieved.

**MAKING IT HAPPEN: CREATING A KNOWLEDGE-BASED ECONOMY**

D1.28 The economic consultants have set out some clear policy implications which emerge from the layered model above (include reference). The promotion of knowledge-led business must made throughout the Black Country. Most importantly, the Black Country economy needs to secure a step change in workforce development and in the quality of the environment. A high quality, ‘greener’, physical environment will be vital if the Black Country is to attract and retain high value companies and their employees.

D1.29 The Long Term Economic and Employment Strategy for the Black Country set out by the economic consultants proposed three key strands for development of a Black Country Economic Action Plan:

1. **Attract the Future** – supporting knowledge business growth.
2. **B-Connected** – to knowledge and markets through quality transport and IT infrastructure.
3. **Create Spaces** – quality environments and space for business across all sectors.

<table>
<thead>
<tr>
<th>Enabling actions proposed by the economic consultants for each of the three key strands of the Black Country Economic Plan:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Attract the Future:</strong></td>
</tr>
<tr>
<td>Working with the public services, social enterprises and businesses to:</td>
</tr>
<tr>
<td>• Identify pillar companies and support expansion of value added activity.</td>
</tr>
<tr>
<td>• Facilitate inward investment in higher value activities.</td>
</tr>
<tr>
<td>• Target cultural and creative industries as source of wealth creation and social capital.</td>
</tr>
<tr>
<td>• Encourage higher skilled and higher paid workers to live and work in the Black Country.</td>
</tr>
<tr>
<td><strong>In summary</strong> - attracting and retaining value added businesses.</td>
</tr>
</tbody>
</table>
2. **B-Connected**

- Improving community and business connectivity to generate added value through multiple activity to:
  - Create a population which is empowered to participate in the new economy.
  - Encourage business formation in knowledge and creative industries.
  - Build and align social capital around a knowledge driven economy.
  - Promote innovation and entrepreneurial values.
  - Improve the accessibility and physical connectivity of the Black Country, both within and beyond the sub-region.

**In summary** - to embrace the knowledge economy by focusing on:

- People: Long-term education and training.
- Technology: knowledge management and innovation.

3. **Create Space**

Creating the right spaces attractive to activities required to achieve income generation in Black Country in terms of:

- The spaces where creative and knowledge activities are fostered, such as through incubation hubs and cultural assets.
- The spaces where knowledge, high value and wealth enhancing activities will locate and can grow, such as through provision of grow on spaces for incubation, technology parks and new live/work environments, utilising key Black Country physical assets of canal, heritage sites and buildings.

**In summary** - the creation of a 21st Century Environment.

This requires action on:

- Environmental renewal across the Black Country.
- Land assembly to create new spaces.
- Focus on arts and leisure provision.
Eight key programmes will be developed to take forward Economic Development:

**Hardware:**
1. Strategic Centres Investment Plans.
2. Creation of quality employment sites.
3. New Colleges in Centres.
4. New Landscape Flagship developments, arts and leisure provision.

**Software:**
1. Promotion of knowledge in strategic business sectors.
2. Skills development in strategic (larger) employers.
3. Education Progression in the Black Country.
4. Creating knowledge, tapping knowledge, supporting innovation and incubation.

To support these programmes 'pillar companies’ have been identified to work with in the Black Country – companies that will drive the change towards higher value added activity and reduce the £2.6bn output gap. These firms are seen as not only larger companies, but also fast growing businesses and new businesses exploiting new technologies – all of whom are willing to consider how they can contribute to, and benefit from, the Black Country Strategy. The Black Country Observatory and Black Country Investment have worked with partners to identify these companies (Black Country FTSE 150). How to achieve best support and assist, as appropriate, in aiding the on-going growth and development of these companies is being explored. The aim is to ensure their growth in terms of GVA together with developing export potential to make positive contributions to reversing the current Black Country productivity deficit.

The Black Country Diversification and Modernisation Strategy provides a detailed sectoral analysis of the Black Country economy and group sectors into three categories: expanders (sectors with projected increasing employment, output and productivity), adjusters (sectors with projected falls in employment but increasing output and productivity) and shrinkers (those sectors with projected reduction in both output and employment).

GHK developed this analysis further and advised that in terms of sectoral focus that there should be a particular, though not exclusive focus, on strategic business sectors, reflecting the Regional Economic Strategy, the Black Country Diversification and Modernisation Strategy, analysis of existing/emerging
business concentrations and local knowledge creation, particularly through the University of Wolverhampton. The sectors proposed as foci for support are:

- Advanced Engineering
- Logistics
- Building technologies
- Environmental technologies
- Creative industries
- Transport technologies
- ICT
- Medical technologies
- Polymers and plastics
- Financial and Business services

D1.34 The Diversification and Modernisation Strategy does advocate a balanced diversification and modernisation strategy, which recognises the potential for value creation across a wide range of the economy. This is reinforced by GHK who advise that priority should be given where it can be shown that the activity will lead to a material change in the level of value added, sustainable over the medium-term (say 10 years), irrespective of the sector. This is in line with regional thinking and the focus on business support to “winners” irrespective of the sector.

D1.35 The radical scale and nature of the transformational change emerging from the Black Country Study provides itself a stimulus towards developing technological and business expertise to deliver that transformation with opportunities for subsequent ‘export’ elsewhere, notably in building, transport, environmental technologies and creative industries.

D1.36 A key component of the Economic Action Plan is the development of a Black Country Incubation Strategy which has been underway since February 2005. This Strategy will guide the approach to incubation and the creation of new knowledge-led businesses over the next 10 years, reflecting our commitment to increasing entrepreneurship and productivity as a means to help reduce the £2.6bn productivity gap (as set out in Appendix A2). This recognises that the incubation process will play a key supporting role, increasing demand for commercial workspace and creating higher paid employment opportunities for the local population. Implementation of this Strategy is directed at creating 17,000 new jobs over 30 years.

D1.37 **The Incubation Strategy proposes four strategic programmes:**

1) **Unlocking existing incubation potential** – such as enhancing the effectiveness of existing business support as an integrated Black Country service with strengthened interface between Wolverhampton University and our Colleges and businesses and

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provision of ‘grow-on’ space for successful firms.

2) **Developing new Incubation environments** – a portfolio of property based and ‘virtual’ business support services.

3) **Targeting sectors and technologies** – including Black Country priority sectors of transport technologies, ICT, medical technologies, advanced engineering, polymers & plastics, logistics, building technologies, environmental technologies and creative industries.

4) **Changing the culture** – encouraging more entrepreneurial spirit within Black Country resident, business and business support communities to bring forward ideas with greater opportunities to develop them – working with schools, businesses and students.

D1.38 An Action Plan is being prepared in consultation with AWM, the Regional Development Agency. Proposals include Wolverhampton Science Park Phase IV, a Business and Learning Campus in Walsall Town Centre, a Black Country Performance Arts Centre as part of Wolverhampton University’s Community University Campus in Walsall and proposals for an Innovation Centre in Dudley.

D1.39 The University of Wolverhampton will have a major role to play in supporting the development of technology-led business economy. It already plays a leading role through the growth of Wolverhampton Science Park and proposals to the north of Wolverhampton for a Technology Park, known as i54. There will be a strengthening of connections between the University’s research expertise and business, such as its lead on materials technologies. There will also be greater efforts to extend the range of research and development expertise not only in the University but also in Black Country Colleges and in the attraction of new Research Institutes to the Black Country.

D1.40 It is vital therefore that the whole of the Black Country and its businesses are seen as **integral to Birmingham City Region as a Science City** with greater efforts to connect business with the knowledge university based knowledge creation and opportunities to develop their own knowledge base through research and development facilities. Through the implementation of our Incubation Strategy a more pro-active support network should be established to enable Black Country entrepreneurship and business to contribute to reducing the current £2.6bn productivity gap (see Appendix A2). Consideration will need to be given therefore through the upcoming review of the Regional Economic Strategy to the effectiveness of the existing arrangements for High Technology Corridors to deliver effective connectivity between Black Country business and entrepreneurs to knowledge expertise in Birmingham and regional universities. To deliver the proposed Economic Strategy, the Black Country needs to be seen as a whole (but with a focus in spatial terms on the four proposed Employment Land Investment Corridors set out below) as a Technology-led Business and Enterprise Zone with policies and an action plan to support.
**Where will we focus long-term investment to support the growth of the knowledge economy?**

D1.41 First, to **expand the knowledge base of our centres**, making them the primary locations for new high value-added office-based services, enterprise and R&D. Second, to create more **high quality employment sites** in physical environments fit for modern business. Third, to focus investment in Schools, Colleges and Universities to create a **21st Century Workforce**.

1. **Town centres: home to more knowledge-based companies**

D1.42 To compete on a national and international stage, the Black Country needs to function as a single economic area. Only by doing so will it effectively harness the economic potential of over one million people. Working together will enable the area to create a far stronger Black Country-wide offer to inward investors.

D1.43 The four strategic centres – Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill – will drive economic growth. Both the Centres Study and Economic Study highlighted the need to substantially increase the scale and quality of **office space** in these centres to attract knowledge-based services.

D1.44 The Economic and Employment Land Capacity studies indicated a global requirement for major additional office floorspace of 1.45m. sq. m up to 2031 (0.85m sq m to 2021) with emphasis on Centres locations. Building on our current strengths, the initial focus will be Wolverhampton City Centre and Brierley Hill Waterfront - both of which have in recent years proved attractive to the market. Developers have expressed a preference for initially focusing investment in these areas to establish confidence in the Black Country office market and trigger transformation elsewhere.

D1.45 To improve the knowledge capacity of our centres, they will also become the primary locations for growth of **enterprise and innovation**. The Incubation Strategy highlights that key elements of knowledge creation, entrepreneurship and incubation should be located in our Centres. To raise levels of innovation needs better connections between knowledge creation and business. Investment will be focused in the University and Colleges within centres, developing the specialisms identified in the Black Country Study. The proposals for a Business and Learning Centre in Walsall Town Centre illustrate this.

D1.46 Finally, the core **retail and leisure** functions of our centres need strengthening both of which are increasingly important sources of employment and economic growth in modern economies. The Centres and Economy studies have reinforced the need for these activities to be focused on the four strategic centres in order to stem the current leakage of expenditure. If the Black Country is to retain its market share, these studies estimate the need for 374,000 sq metres of non-food retail floorspace to 2031, supporting around 6,000 new jobs. Further detail on the strategy for centres is outlined in **Chapter D2**.
2. High quality employment sites in environments fit for modern business

D1.47 ‘Fit for purpose’, attractive, high quality employment sites both within and outside our centres must be provided. The Economic and Employment Land Capacity studies estimate the need for 1,600 ha of high quality employment land to 2031, transforming former poor quality industrial areas (1,000 ha to 2021). This is the scale of investment in employment land outside of strategic centres required to deliver the Black Country Economic Strategy. These sites need to be readily accessible to the national freight network (road and rail). Sustainable modes of transport will also be needed to connect them to residential areas and the local pool of labour.

D1.48 Knowledge-based industries and the people that work in them will only be attracted to the Black Country if high quality sites are provided to meet their business and lifestyle requirements. These requirements are often highly specialised but for most firms there are some fundamentals we need to get right, including: connectivity by public and private transport, quality of the public realm, and access to local amenities. One of the key findings of the Economic and Housing studies was that in order to embrace the knowledge economy, we must improve the overall quality of the environment in the Black Country.

D1.49 In recognition of the needs of different companies, environments of the highest quality for the accommodation and growth of knowledge-based businesses will need to be provided on new high quality technology parks. Technology Parks provide a high profile, quality environment and premises (including incubation space), sometimes with shared services and business support, with sufficient space to enable knowledge based businesses to expand on the same site over time. We do not propose the development of Bl(a) office based business parks – our focus for Bl(a) offices is firmly on our four strategic centres. A key purpose of these Technology Parks will be to expand the research and development capabilities of the whole sub-region, complementing the role of Wolverhampton Science Park (WSP). Characteristics of these Technology Parks should include a high profile site with excellent car and public transport accessibility, links to technology and a knowledge base and to incubation facilities. The image of the site and the attractiveness of its environment are critical. Increasingly a range of services are sought by occupiers including retail, leisure as well as access to meeting rooms and broadband connectivity. Office development will therefore be an integral part of the mix of development. The Consortium needs to exploit the economic potential of our Science and Technology Parks by increasing the rate of technology transfer, creating business opportunities and jobs. In addition, they should be sources of enterprise - certain types of incubation provision require out-of-centre locations. Of course, the scale and location of new developments will need to be carefully planned to complement Centres development. These Technology Parks could be developed in conjunction with the creation of new quality residential environments. This potential will be examined.
D1.50 The Black Country has a tradition for world-class performance in manufacturing. Retention and expansion of the number of high value manufacturing companies in the sub-region is integral to the Economic Strategy proposed by consultants, albeit acknowledging that market forces mean the sector as a whole is likely to employ some 65,000 fewer people by 2031 (52,000 fewer at 2021). Other regional economic forecasts undertaken by Cambridge Econometrics imply that decline in the manufacturing workforce in the Black Country may not be so steep as that modelled specifically for the Black Country by Oxford Economic Forecasts as part of the Black Country Economic Study led by GHK. West Midlands Enterprise have calculated that the alternative scenario is a loss of 45,000 manufacturing jobs to 2031 (30,000 to 2021). It would be prudent, therefore, to ensure that land use planning will accommodate a range of employment land need for manufacturing and that trends are closely monitored. In order to create a competitive manufacturing sector, we need to provide high quality industrial sites. In parallel, there will be a continuing surplus of poorer quality industrial land. This will allow for a ‘shakeout’ of such land to facilitate provision of new housing in a much improved environment.

D1.51 Due to its location, the Black Country is highly attractive to the logistics sector. To attract further growth we need to provide more high quality locations to accommodate up to 17,000 new jobs in logistics by 2031. These will need to provide ready access to the motorway (5-10 minutes reliable journey time) and be in an environment which is attractive to workers and provides investor confidence. The Regional Logistics Study states that locations with access to a rail connection are also desirable.

D1.52 Overall, the Employment Land Capacity Study estimates that to grow the logistics sector by 18,000 jobs requires an additional 245 ha of land by 2031 (160 ha to 2021). To accommodate this scale of growth we will consider the designation of ‘Logistics Parks’ in the Black Country. These may typically be 20-25 ha in size as advised by the Employment Land Study. Their identification would be brought forward through the development plan process, with their location being carefully considered so as to avoid exacerbating congestion. Walsall Urban Regeneration Company has already identified land at Darlaston in proximity to M6 Junction 10 as one focus for logistics development.

D1.53 The need for, and location of, regional logistics sites (defined as in the order of 50 ha or more) will be addressed in the RSS Phase Two Revision. The Regional Logistics Study has identified the North Black Country/South Staffordshire area as one of the four best regional logistics locations in the region that is for sites with a minimum scale of development of 50 ha, but which the market is typically building out at in excess of 100/120 ha. The provision of such a site would make a major contribution to the economy of the Black Country, but the Employment Land Capacity Study demonstrates that the provision of such a large site, with both rail and motorway connections and its requirement for 24 hour operating, is unlikely to be capable of accommodation within the Black Country itself. They suggest therefore consideration of provision in the environs of the Black Country with access to the Black Country labour market.
The RSS Phase Two Revision will need to consider this relationship in deciding where best to locate regional scale logistics facilities.

3. A workforce for the 21st Century

D1.54 Knowledge-based companies will only be attracted to the Black Country if there is a much deeper pool of highly skilled labour. To strengthen the workforce local people need to be equipped with the skills and qualifications needed to succeed in the modern economy. This will necessitate variable actions across communities in recognition of their differential skill base. In addition, to retain and attract more highly qualified A/B income groups to the Black Country – those currently most likely to leave the area. The strategy for addressing education and training needs in the Black Country is outlined in Chapter D5.

D1.55 Attracting highly skilled, well-paid people from outside the Black Country to live and work in our economy will require delivery on almost all aspects of the Black Country Study. The demands of this demographic mean that delivery of the right mix of mid-market and high-market housing, a quality leisure, retail and cultural offer, a first class education system, and much more. Strategy for addressing housing needs in the Black Country is set out in Chapter D3.

PRIORITIES FOR ACTION

Where will the transformation of the Black Country economy begin over the next five to ten years?

D1.56 Strategy is to focus investment on the growth and transformation of the Black Country’s four strategic centres and on four employment land investment corridors (Map D1.1). The identification of these areas has been informed by the recommendation of the GHK led Economic Strategy to focus economic transformation on the key centres and by the GVA led Employment Land Capacity Study which identified the deficiency of high quality employment land for knowledge business and the potential localities for its provision. Further market based advice was sought from consultants Bucknall Austin\(^7\) regarding the best market opportunity areas in the Black Country.

The Four Strategic Centres will be the foci for office growth and retail floorspace (comparison goods), coupled with leisure and development of ‘city living’. They are:
1) Wolverhampton City Centre.
2) Walsall Town Centre.
3) West Bromwich Town Centre.
4) Brierley Hill/Merry Hill (proposed for designation as a Strategic Centre through the RSS Phase 1 Review).

D1.57 **The Four Employment Land Investment Corridors** will be the foci for the provision of high quality, accessible employment land for knowledge driven manufacturing, logistics and technology-led incubation and growth companies. Each Corridor will be linked to a Strategic Centre and to the national motorway network. They are, as indicated diagrammatically in *Map D1.1*:

1. Wolverhampton Stafford Road Employment Corridor (incorporating the existing Wolverhampton Science Park and the proposed i54 Technology Park) *(Black Country North)*.
4. Oldbury – West Bromwich Employment Corridor (incorporating M5 Junctions 1 and 2 and Sandwell & Dudley west coast mainline station) *(Black Country East)*.

D1.58 Draft revisions to RSS policies are proposed to facilitate the implementation of this strategy, notably through revision to PA11 to designate Brierley Hill/Merry Hill as a Strategic Centre and the inclusion of the Employment Land Corridors in the new proposed Black Country urban renaissance policy, UR1A. The extent of Strategic Centres and the proposed Employment Land Investment Corridors is the subject of the ongoing statutory planning process through Core Strategy and Local Development Documents. A robust and transformational landscape, land use planning, transport and design framework will be prepared to guide investment decisions for each of these areas.

D1.59 Based on the evidence from the Black Country capacity studies and consultants’ strategic advice, by 2031 growth of some 77,000 jobs in the four strategic centres (46,000 to 2021) with a further 50,000 jobs in the four Employment Land Investment Corridors (22,000 to 2021) can be accommodated. *Table D1.3* below sets out indicative distribution and potential phasing of that provision. The distribution of retail comparison goods

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5 Accommodating Technology and Service Related Companies in the Black Country Bucknall Austin, Charles Monck & Associates, September 2005
floorspace and of office floorspace set out in this table has been the subject of joint
development and agreement between the four local planning authorities. The data for the
Employment Land Corridors is indicative of the potential scale of development which could
be accommodated based on the Black Country Employment Land Capacity Study. These
figures are subject to further joint planning review and agreement between the four Black
Country Local Planning Authorities.

Table D1.3 Accommodating Employment Growth: Centres and Employment Land Investment Corridors

<table>
<thead>
<tr>
<th>Location</th>
<th>Locations for Growth and Quality Enhancement</th>
<th>Phase I (to 5 years) to 2011</th>
<th>Phase II (5–15 years) 2011 - 2021</th>
<th>Phase III (15+ years) 2021 - 2031</th>
<th>Total Capacity 2003 – 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>*<em>Black Country Key Centres <em>1:</em></em></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| W | Wolverhampton City Centre Expansion:  
Retail Development  
Office Development | 57,000m² | 187,000m² | 26,000m² | 83,000m² | 325,000m² |
| **Wolverhampton Centre Proposed Jobs Growth** | | | | | |
| Ws | Walsall Town Centre Expansion:  
Retail Development  
Office Development | 23,000m² | 151,000m² | 23,000m² | 68,000m² | 325,000m² |
| **Walsall Centre Proposed Jobs Growth** | | | | | |
| WB | West Bromwich Town Centre Expansion:  
Retail Development  
Office Development | 19,000m² | 160,000m² | 18,000m² | 53,000m² | 325,000m² |
| **West Bromwich Centre Proposed Jobs Growth** | | | | | |
| BH | Brierley Hill/Merry Hill New Centre and Expansion:  
Retail Development *2  
Office development  | 13km² off | 174,000m² | 29,000m² | 80,000m² | 325,000m² |
| **Brierley Hill Centre Proposed Jobs Growth** | | | | | |
| **Total Strategic Centres Proposed Jobs Growth** | | | | | |
| **Black Country Employment Land Investment Corridors *3:** | | | | | |
| EC1- Black Country North Corridor (Wolverhampton - Stafford Road) | | | | | |
| EC2- Black Country Central Corridor (Walsall - Darlaston – Neachells - Wednesbury Corridor i.e. Black Country Route/New Road) | | | | | |
| EC3- Black Country West Corridor (Pensnett/Dudley/Brierley hill) | | | | | |
| EC4- Black Country East Corridor (Oldbury/West Bromwich) | | | | | |
| **Other Local Centres and Employment Land Opportunity Areas (e.g. N. Aldridge, & Coombes Wood, Dudley) and Mixed Use outside Empl Land Investment Corridors (including commitments off-centre) Indicative Jobs Growth** | | | | | |
| **TOTAL BLACK COUNTRY JOBS GROWTH (GROSS)** | | | | | |

*1 Data reflects split of retail and office growth Centres/Off-Centre & between Strategic Centres agreed by Leaders. Retail (A1, % A2) 75% strategic centres, 25% other. Offices (B1a, % A2) – 100% Strategic Centres (after allowing for off-Centre commitments). Figures adjusted to take account of retailing as set out in Regional Centres report. Retail = floor space for comparison goods shopping only.

*2 It is proposed that retail comparison goods floor space development be limited to 36,000m² to 2016 to
facilitate balanced development of the four strategic centres.

*3 Indicative Jobs Growth figures are all sectors (manufacturing, logistics, services and retail) – based on GVA Employment Land Capacity Study and mapping of PRISM ‘Preferred Strategy’ data input. All jobs growth figures include both phases I and II covering the whole period to 2021.

*4 Includes 6,700 committed jobs located outside Wolverhampton, but serving BC (e.g. i54).

NB. GHK Economic Strategy for BCS identifies a need for accommodating 160,000 new jobs (gross) 2003 to 2031 (+103,000 pro rata to 2021). The GVA Employment Land Capacity Study identified that a element of land provision for logistics jobs serving the BC economy would need to provided on the periphery of the BC. The Preferred Strategy identifies a desire for provision of a Regional Logistics Park to the north of the BC but accessible to the BC labour market.

Note there remains a potential phasing issue re 'undersupply' in 2003-2021 (capacity identified for +80,000 jobs cf Economic Strategy need for +103,000 jobs).

The proposed strategy of distribution of employment provision set out in this schedule and the accompanying map describes where provision will be made for growth for both new jobs and employment restructuring.

The GHK Economic Strategy, based on Oxford Forecasting, predicted a NET loss of 65,000 manufacturing jobs. Analysis has also been undertaken of alternative regional economic forecasts by Cambridge Econometrics which suggested a smaller although also dramatic continuing decline of manufacturing jobs – this identified an alternative scenario of 45,000 jobs loss (i.e 20,000 fewer than the Oxford forecast).

The Preferred Strategy proposed would allow for flexibility to accommodate that range manufacturing job decline of scenarios. The Strategy does not PLAN for the loss of manufacturing jobs by removing land available for such employment to the scale of these scenarios. It does though recognise that this change will occur and that there will also be a need for provision of quality employment land for new jobs in the manufacturing sector. The Preferred Strategy therefore proposes employment land restructuring which transfers some employment land to housing and creates new employment land.

The Housing Growth map and schedule sets out the housing strategy of concentration of housing growth on Centres and Corridors. This is based on capacity analysis which would indicate the transfer of some 1,700 ha of employment land to residential led mixed use to 2031 (1,100 ha to 2021). Consultants have calculated that the gross loss of existing jobs from such a transfer of land would be 27,800 from 2003 to 2031 (14,500 from 2003-2021). Many of these areas are already in decline. However, this process will be managed to ensure that individual companies affected by this transfer are provided alternative quality sites to relocate within the Black Country.

Some 2,200 ha of existing employment land is retained in the Preferred Strategy. The Strategy proposes focusing on enhancement of the quality of that retained land where it is located in the proposed Employment Land investment Corridors. In other locations it would be expected that a mixture of redevelopment and decline in employment densities would take place as per economic trends. The Strategy assumes this will equate to a net decline in manufacturing jobs on retained employment land of between 17,000 and 37,000 jobs (i.e. the range of manufacturing job loss trends of 45,000 to 65,000, less the 28,000 job losses estimated from the process of employment land transfer to housing). This will require monitoring.

D1.60 Within each corridor and centre, we have identified key projects where we will prioritise initial investment. Our intention is for these projects to generate immediate signals to the market that the Black Country economy is a place for high value companies to do business.

**Investment in Strategic Centres**

D1.61 We have identified the following schemes for immediate action to accelerate the growth of retail, leisure and office-based employment within our strategic town centres.
D1.62 The Strategy proposes that Dudley Town Centre will no longer be designated as a Strategic Centre. However, it will continue to play an important economic role within the Black Country – the Strategy proposes expansion of its role as the focal point of an integrated Black Country tourism offer, such as by making enhancements to the town centre and by exploiting the potential of Wren’s Nest Nature Reserve, Dudley Castle Zoo and the Black Country Living Museum.

### Employment Land Investment Corridors

D1.63 Outside Centres, the Strategy proposes the location of high value logistics, manufacturing and new science/technology parks along key employment corridors. These Corridors, as the foci for investment in creation of quality employment land, will require the preparation of masterplans and action plans to assemble land, transform the environment and guide investment in land, buildings and infrastructure. The following schemes have already been identified to lead out change in these corridors to provide quality employment land opportunities for knowledge led business.

<table>
<thead>
<tr>
<th>Corridor</th>
<th>Key Schemes</th>
</tr>
</thead>
</table>
| Black Country North | • IS4 Technology Park and MIS  
                      | • Wolverhampton Science Park Phase IV                                      |
| Black Country Central | • Darlaston SDA Logistics Park (Walsall URC)  
                        | • Hill Top Environmental Technology Park (RegenCo)                         |
| Black Country West  | • Dudley Innovation Centre                                                 |
| Black Country East  | • Junction 1 Business Centre (West Bromwich Centre expansion) (RegenCo)  
                      | • Sandwell & Dudley Station Business Centre (West Bromwich Centre expansion) (RegenCo) |

D1.64 Integrated with the planning for these areas will be the identification of a location for the development of a new Research Institute/Science Park in the south/eastern part of the Black Country to complement the planned investments in science and technology led investment in Enterprise Black
Country North (as part of the Black Country and Telford High Technology Corridor).

D1.65 Demand for logistics sites in the Black Country is likely to outstrip supply, we will therefore encourage and work with the rest of the region, through the draft revision to RSS policies, to identify 1-2 sites (depending on size) to the north of the sub-region to locate large scale operations. These sites would be linked to the Black Country’s labour market.

Other Locations in the Black Country

D1.66 Focusing investment on the centres and employment land investment corridors does not mean ignoring environmental improvement and economic investment potential in other parts of the Black Country. The Black Country is particularly characterised by a wide variety of town and district centres around which traditionally Black Country communities have developed. Investment in these centres will be encouraged of a scale and type which reflects their character and traditional shopping and service roles together with serving housing growth corridors set out in Chapter D3. This will complement the focus of economic growth on the four strategic centres. Additionally, there are other existing employment land locations outside the Corridors which will continue to provide land and buildings to meet the range of employment needs set out in the economic and employment land studies, in particular for manufacturing and logistics. Examples of these include North Aldridge in Walsall and Coombes Wood in Dudley. These will be identified through the Black Country and Borough planning processes and policies put in place to protect and enhance employment land provision in line with Black Country needs.
D2 EXPANDING THE FOUR STRATEGIC AND OTHER TOWN CENTRES

THE CURRENT POSITION

D2.1 The strategic centres including Brierley Hill/Merry Hill have a crucial role to play in achieving the 30-year Vision. In order to provide a sound evidence base for developing strategy BCC initially commissioned a major independent study - to analyse the present characteristics of these centres and give guidance on their future evolution. The study\(^1\) reported in August 2005 and provides the foundation for our proposals, but adapted in the light of a subsequent study undertaken at the regional level\(^2\) together with a number of studies of specific issues which the Consortium also commissioned\(^3\).

(a) Shopping

D2.2 Thirty years ago, the Black Country comprised a dense network of centres, collectively achieving a turnover comparable to Birmingham, Solihull and Sutton Coldfield combined. Wolverhampton was the second largest centre in the West Midlands with a comparable number of shops and a turnover of approximately 60% that of Birmingham (see Table D2.1 below). Walsall, Dudley and West Bromwich were smaller but significant centres serving the needs of their boroughs. Merry Hill had not been built.

D2.3 Since then, the current network of centres has undergone radical change as a result of the emergence of Merry Hill, falling relative incomes in the Black Country, lack of investment in the public realm, and the increasingly high quality retail offer in Birmingham. In retail terms, notwithstanding the introduction of Merry Hill into the hierarchy, the Black Country is leaking retail trade to neighbouring towns and cities elsewhere in the region and beyond. While the Black Country Consortium would expect Birmingham, as the regional centre, to draw trade from the Black Country, the Centres Study indicates that this leakage is excessive, and is increasing. Figure D2.1 shows how the continuing growth of Birmingham has been at the expense of the Black Country Centres, providing a graphic illustration of the ongoing polarisation of retail activity to fewer, larger centres.

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\(^1\) Study of Black Country Centres, GVA Grimley, August 2005.


\(^3\) (a) Investment Analysis and Future Investment Potential of the Black Country Retail Centre, Chase and Partners, March 2006; (b) Economic Impact of the Expansion of Merry Hill/Brierley Hill, Regeneris Consulting, April 2006; (c) (i) Assessment of Major Out-of-Centre Retail Outlets in the UK, White Young Green, May 2006: and (ii) Assessment of Future Market Shares and Accommodating Future Needs, White Young Green, May 2006.
White, Young, Green\textsuperscript{3} have assessed the implications and scale of additional leakage that will occur if the Black Country fails to provide sufficient indigenous retail growth. The research also estimates the potential increases in leakage that would occur if Brierley Hill/Merry Hill is not enabled to grow as a key contributor to fulfilling indigenous growth.

**Table D2.1: Retail Hierarchy 1971 – Central Area Statistics**

<table>
<thead>
<tr>
<th></th>
<th>Total Shops</th>
<th>Turnover [£m]</th>
<th>Persons Employed</th>
<th>Floorspace [000sq ft]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
<td>557</td>
<td>76.11</td>
<td>12,310</td>
<td>1,862</td>
</tr>
<tr>
<td>Wolverhampton</td>
<td>548</td>
<td>45.31</td>
<td>6,651</td>
<td>1,008</td>
</tr>
<tr>
<td>Walsall</td>
<td>301</td>
<td>21.03</td>
<td>3,185</td>
<td>483</td>
</tr>
<tr>
<td>Dudley</td>
<td>240</td>
<td>16.78</td>
<td>2,668</td>
<td>428</td>
</tr>
<tr>
<td>West Bromwich</td>
<td>257</td>
<td>12.47</td>
<td>2,089</td>
<td>299</td>
</tr>
<tr>
<td>Bilston</td>
<td>221</td>
<td>7.02</td>
<td>1,075</td>
<td>141</td>
</tr>
<tr>
<td>Stourbridge</td>
<td>173</td>
<td>6.87</td>
<td>1,125</td>
<td>168</td>
</tr>
<tr>
<td>Halesowen</td>
<td>122</td>
<td>5.56</td>
<td>802</td>
<td>113</td>
</tr>
<tr>
<td>Bearwood</td>
<td>179</td>
<td>5.07</td>
<td>820</td>
<td>106</td>
</tr>
<tr>
<td>Cape Hill</td>
<td>161</td>
<td>4.58</td>
<td>747</td>
<td>100</td>
</tr>
<tr>
<td>Wednesbury</td>
<td>131</td>
<td>3.86</td>
<td>601</td>
<td>81</td>
</tr>
<tr>
<td>Bloxwich</td>
<td>87</td>
<td>3.65</td>
<td>587</td>
<td>72</td>
</tr>
<tr>
<td>Great Bridge</td>
<td>74</td>
<td>3.58</td>
<td>574</td>
<td>91</td>
</tr>
<tr>
<td>Blackheath</td>
<td>152</td>
<td>3.53</td>
<td>706</td>
<td>84</td>
</tr>
<tr>
<td>Cradley Heath</td>
<td>143</td>
<td>3.51</td>
<td>641</td>
<td>91</td>
</tr>
<tr>
<td>Brierley Hill</td>
<td>95</td>
<td>3.19</td>
<td>465</td>
<td>70</td>
</tr>
</tbody>
</table>


**Figure D2.1: Changing Market Shares, Birmingham and the Black Country, 1971-2004**

Source: CACI's Retail Footprint 2004
D2.4 A particular concern highlighted in the Centres Study is that the highest earning (A/B) groups in the Black Country generally spend their money outside the Black Country. Retail in Black Country Centres is relatively low value, reflecting the income distribution of local consumers.

D2.5 Wolverhampton’s turnover is now only around 20% that of Birmingham, while Walsall, and more particularly Dudley and West Bromwich, have all seen their status in the region decline. Merry Hill is the strongest retail centre but limited public transport means it has been accessible mainly to local people or those with private transport, rather than the sub-region as a whole; access has been particularly poor from Wolverhampton and Walsall.

D2.6 Over the last 20 years the relative decline of retailing in the traditional Black Country centres has been compounded by out-of-centre development, and not only influenced by Merry Hill. Much of the other comparison retail investment that has taken place has been in the form of ‘retail parks’, which have diversified well beyond their traditional ‘large foodstore’ and ‘bulky goods’ roles. Stricter planning policies in recent years have curtailed such developments however, and those that have taken place recently have tended to be located edge-of-centre, as at Crown Wharf, Walsall.

D2.7 In consequence there is some evidence of renewed market interest in major in-centre schemes. The ‘core expansion’ project in Wolverhampton, including 46,500 sqm of comparison retail in a mixed use scheme extending southwards from the Mander and Wulfrun centres, now appears to be imminent. In Walsall permission has been granted for a 23,000 sqm retail redevelopment in the Digbeth area, and Tesco’s proposals for rejuvenating West Bromwich town centre will shortly be submitted for planning permission.

(b) Other Town Centre Activities

D2.8 Of course, town centres are not just places for shopping, they are also places for people to work, to live and to take part in leisure and cultural activities.

D2.9 ‘City Living’ has been a concept more familiar to larger cities and towns in the UK. Since 1991, Birmingham has established itself as the major centre for ‘City Living’ in the West Midlands, and over 3,500 new dwellings have been constructed in the city centre with strong growth in sales values. The market for smaller units has seen the strongest growth, and this trend is expected to continue, reinforced by the strength of the city centre as an employment base, and its retail, leisure and cultural offer.

D2.10 According to the Centres Study\(^4\), three of the key centres – Wolverhampton, Walsall and Brierley Hill/Merry Hill - are now seeing signs

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of expansion of homes allied to retail, offices and leisure. In Wolverhampton a number of projects have come forward within the City Centre, including the Market Square development, and Redrow has commenced a phased scheme in the Canalside Quarter. The indicators are that within the St John’s Urban Village and the Canalside Quarter, Wolverhampton is likely to see a sustained interest in growth in mixed use residential and leisure development, capitalising on the cultural attractions of the centre and its improving communication links.

D2.11 In Dudley and Walsall the city living market is less well developed. However both centres have begun to attract interest in residential and mixed use developments. In Walsall, there is increased interest in residential conversions. However, the market for large scale purpose built residential schemes in these centres is at a much earlier stage. In Dudley, proposals associated with initiatives at Dudley Zoo and Castle include almost 300 housing units, and there are also proposals for mixed leisure and residential development on the edge of the Walsall Town Centre.

D2.12 It is evident that the national trend towards high density city living, and the creation of genuinely mixed use residential and leisure developments within and on the edge of city centres, offer significant potential for Wolverhampton, Walsall and Dudley. However, the process could be described largely as embryonic. There are currently insufficient quality homes, jobs and amenities to attract people back into our urban centres. Again, the lack of investment in the public realm and poor quality of the environment have been major constraining factors.

D2.13 In the office sector, analysis of the regional and local office market by GVA Grimley (2005)\textsuperscript{5}, illustrates a growing disparity between the dominance of Birmingham City Centre as the key regional office centre, and the limited role performed by the Black Country Centres. Over the next 5 – 10 years, a number of opportunities and development projects in Birmingham city centre could provide a further 464,500sq m i.e. an increase of circa 50% in the current stock.

D2.14 In the Black Country there has been limited development in the traditional centres of Walsall, Dudley and Wolverhampton. There is no significant office development pipeline in these centres, and the existing accommodation is generally dated and falls short of current occupier requirements in terms of parking, technology, floor to ceiling heights and floor plates layout.

D2.15 The main exception is at Brierley Hill/Merry Hill where the Waterfront at Merry Hill represents a successful integration of a retail centre with Brownfield “business park” provision. The Waterfront at Merry Hill has been developed since the late 1980s and is now an established office location with rentals significantly above comparables in the traditional

\textsuperscript{5} Study of Black Country Centres, GVA Grimley, August 2005.
Black Country Centres. Reflecting its growing stature as a significant office location, over 300,000 sq m of B1 space is proposed at Brierley Hill as part of the Vision to 2031, which would significantly strengthen the position of Brierley Hill as the most significant ‘central’ office location within the West Midlands conurbation after Birmingham City Centre.

D2.16 The **culture, sport and leisure offer** in town centres insufficiently meets the needs of local people and families. The new Art Gallery in Walsall town centre shows what can be achieved. More projects like this are needed to offer people greater choice. In the evenings, there are few options in terms of eating out, going to the theatre or cinema. Many people feel that evening entertainment is limited to bars and clubs for young people. There is also insufficient provision to enable the promotion of the Black Country as a major cultural and sport tourism destination, whether this is in the regional domain or in international events and competitions.

D2.17 The scale of retail, leisure and office development currently planned within the Black Country centres will not deliver the Vision for 2031. Without significant new development, the implication is that key centres will decline further in relative terms, and fail to meet needs and aspirations. In making additional provision, the opportunity exists through policy intervention to develop a more balanced polycentric network of centres.

**THE SCALE OF THE CHALLENGE: CREATING A POLYCENTRIC NETWORK OF CENTRES**

D2.18 Under the Vision the four strategic city and town centres will be fuelling the growth of the Black Country; providing high quality office space for knowledge-based companies, and vastly improved retail, leisure and tourism offers. New homes supporting ‘city living’ and a higher quality public realm will bring more people into the key centres, adding to the level of economic activity.

D2.19 The Vision is for the four centres to seamlessly link together and with their catchment areas, creating a ‘polycentric network of centres’. This will only be achievable with a modern, integrated transport system enabling the free movement of goods, services and people. With an integrated network of centres, the assets and strengths in each centre will be accessible to all people in the Black Country.

D2.20 The technical evidence has demonstrated the need to focus much investment effort on **four strategic centres** - Wolverinehampton, Walsall, West Bromwich and Brierley Hill/Merry Hill. These centres present the greatest opportunity to attract growth and have the physical capacity to do so, and will have a major catalytic role to play in sub-regional renaissance.

D2.21 Four centres – Wolverhampton, Walsall, West Bromwich and Dudley have long been dominant in the Black Country, providing the main focus for comparison shopping, business, leisure and culture, and administration. However studies have advised that the time has come to recognise a
major change in this network. The Merry Hill/Waterfront complex at Brierley Hill has now reached the point where it is not only the single largest retailing location in the Black Country but also, de facto, the dominant provider of strategic retail, leisure, and offices in the west of the sub-region. Given both the market and physical constraints on the expansion of Dudley town centre and the positive benefits that further investment in the new centre can bring, BCC is satisfied that ‘Brierley Hill/Merry Hill’ can and should formally supersede Dudley within the Black Country (and regional) network of strategic town centres.

D2.22 Retailing, and in particular comparison retailing, underpins the function of most major centres across the UK. It acts as the catalyst for investment in infrastructure, commercial/residential and cultural facilities (as illustrated by Brierley Hill/Merry Hill). Thus, attracting more comparison retail investment will also reinforce non-retail functions.

**Figure D2.2: Strategic Town Centres in the Black Country (2003-2031)**

<table>
<thead>
<tr>
<th>Centre</th>
<th>Wolverhampton</th>
<th>Walsall</th>
<th>West Bromwich</th>
<th>BH/MH</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparison Retail (including commitments) (000 sq. m.)</td>
<td>83 (57)</td>
<td>68 (45)</td>
<td>53 (35)</td>
<td>80 (51)</td>
<td>284 (186)</td>
</tr>
<tr>
<td>Office Floorspace (000 sq. m.) NB(i)</td>
<td>325 (186)</td>
<td>325 (186)</td>
<td>325 (186)</td>
<td>325 (186)</td>
<td>1.3 m (744)</td>
</tr>
<tr>
<td>Dwellings (minimum) 2001-31</td>
<td>2,000</td>
<td>1,900</td>
<td>1,100</td>
<td>2,700</td>
<td>7,700</td>
</tr>
</tbody>
</table>

NB (i) includes 100,000 sq. m floorspace for A2 use, distributed equally between the 4 centres
(ii) Retail and office figures in brackets = growth to 2021.

D2.23 The technical evidence in the Centres Studies highlighted the need for growth of the strategic centres which is of sufficient scale and quality to meet anticipated needs and to compete effectively with neighbouring centres, in particular Birmingham. The Centres Study indicated the need to create some 467,000 sq.m gross of additional non-food retail floorspace up to 2031, of which about 378,000 sq.m. would be required across the four strategic centres. Overall this scale of retail growth would have supported about 7,000 more jobs.

D2.24 The Centres Study, however, highlighted a particular area of uncertainty, namely the extent to which the amount spent in shops may be reduced as a result of ordering goods via the internet. Some experts believe that this could increase from the present 7-8% of retail sales to as much as 20%. Consortium felt it prudent to make some allowance for this trend. Therefore, the Consortium took account of new forecasts in the Regional Centres Study, which allows for an increase in Internet trading. On this basis the Consortium assessed that the total need for comparison retail

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6 After allowance is made for some 77,000 sq.m of growth which we assess is attributable to parts of the Study Area which lie outside the Black Country boundary.
floor space in the Black Country up to 2031 would be reduced. The recent assessment by Experian that e-tailing could grow but “tail off” by 2014 is referred to in D2.39. Clearly the growth of e-tailing and how far it continues to impact on floorspace needs in the period both to 2021 and 2031 will be a central element of regular monitoring. The total target figures for the Black Country used in RSS Phase One Revision reflect Option 6B of the Regional Centres Study which, of 11 options assessed in that Study, represented the quantum of floorspace which best met the needs of the Vision, whilst at the same time being compatible with growth in other strategic centres in the region. It is important additionally that the level of retail growth reflects the needs of a substantially growing population as required under the approved RSS.

D2.25 In addition, to deliver the Vision of creating a knowledge-based economy, there is a need for circa 1.45 million sqm of office floorspace, accommodating nearly 80,000 jobs by 2031. Growth to 2021 is 844,000 sq m and 45,000 jobs including 100,000 sq metres of committed schemes which are out of centre. Given the recent level of take up (only 37,000 sq metres in total over the past three years), this scale of new development is highly ambitious. The office market in the Black Country is currently strongest at the Waterfront (Brierley Hill/Merry Hill) and Wolverhampton; effort is needed to develop an acceleration of momentum in promoting investor confidence in Walsall and West Bromwich also.

D2.26 To bring more people back into the urban centres, there is a need to build more quality homes in attractive locations such as alongside our canals. The Housing Capacity Study indicates that up to 7,700 additional dwellings could be accommodated in the four centres up to 2031, within which there are attractive canalside opportunities.

D2.27 What is clear is that all four centres will need to expand beyond current boundaries in order to accommodate the necessary scale of growth in retail, office and leisure uses. There is evidence that physical capacity exists in all four centres for this to happen. Failure to do so will see the Black Country’s market share continue to decline. Early planning policy development in each borough will be essential to guide, and provide certainty for, the extent and location of each centres’ change.

**MAKING IT HAPPEN: THE TEN POINT PLAN FOR CENTRES**

| Centres Action Point 1 - Designate Brierley Hill/Merry Hill as a Strategic Centre |

D2.28 The capacity projections in the Centres Study and Regional Centres Study indicate that without further development at Brierley Hill, there will be a significant shortfall against forecast needs. These needs will not be matched by opportunities in any other Black Country centres individually or collectively.
D2.29 It is clear from the evidence that Brierley Hill/Merry Hill should be designated a strategic town centre in order to confirm that further expansion in retail, office and leisure use can take place in accordance with PPS 6. Although the original retail and office development at Merry Hill/the Waterfront was facilitated by the favourable circumstances of the Enterprise Zone, it is clear that there is a market for further investment, subject to the confidence that designation as a strategic centre would bring. Furthermore there are indications that retail growth in this centre has in the past acted as a catalyst, stimulating Brownfield recycling, job creation, growth in office and leisure and, now increasingly, residential development. This catalytic role needs to continue in future to pump-prime the wider regeneration of the local area, and Dudley, and make a key contribution to Black Country regeneration as a whole. The growth requirement for Brierley Hill/Merry Hill has to accommodate the needs of the rest of the sub-region since Dudley town centre is not capable of meeting growth needs of that part of the Black Country.

D2.30 Of course, the expansion of Brierley Hill/Merry Hill is not open ended. It is critical to ensure that its growth complements that of Wolverhampton, Walsall and West Bromwich. This will require sufficient public transport provision to support retail, offices, leisure and residential uses and ensure that Brierley Hill/Merry Hill is enabled to grow, in a controlled and sustainable manner. It is for this reason it is proposed that the recognition of Brierley Hill/Merry Hill as a strategic centre at the regional level should be accompanied by conditions that any retail expansion should not take place until:

- Adoption by the LPA of an Area Action Plan for Brierley Hill, prepared in parallel to the Black Country Joint Core Strategy, which will define the centre, and provide a clear framework for mixed use development, including residential and employment uses, environmental priorities, public transport and phasing of development.

- The implementation of improvements to public transport, including completion of extension of the Metro from Wednesbury to Brierley Hill, or a range of other public transport initiatives of equivalent effectiveness, to improve accessibility to the centre by non-car modes;

- Introduction of a car parking management regime at Brierley Hill/Merry Hill, including the use of parking charges, compatible with those in the Region’s network of major centres;

and in order that balanced growth of our strategic centres is maintained:

- Growth in retail floorspace for comparison goods will be limited to 36,000 sq.m gross in the period 2004 to 2016.
D2.31 If the expansion of Brierley Hill/Merry Hill does not take place, the potential contribution it could make towards economic growth will be severely hampered. Furthermore, regeneration of the Brierley Hill area will be compromised, since there will be insufficient growth to compensate for job losses in manufacturing and the changing job needs of a growing and changing local community. Likewise failure to provide growth and quality shopping plus creation of additional jobs will discourage retaining and attracting back higher income/skilled households to the Dudley area which is a key for meeting housing needs of these groups in the Black Country.

D2.32 The early recognition of Brierley Hill/Merry Hill as a strategic centre is therefore critical. The Brierley Hill Area Development Framework, to guide the long term development of up to 80,000 sq.m of comparison retail, 325,000 sq.m of B1 (a) offices and 2,800 dwellings up to 2031, will be prepared with speed in parallel with preparation of the Joint Core Strategy for the Black Country.

D2.33 There have been previous proposals for the recognition of Brierley Hill/Merry Hill as a “town centre”, in particular:

- As advanced in support of the 1994/5 planning application to extend Merry Hill by 41,805 sq.m gross, refused by the Secretary of State in 1997, when the Inspector concluded that “Merry Hill is not a town centre, at least not yet” (our italics).

- In the proposal to support the emergence of a new town centre at Merry Hill/Brierley Hill and the Waterfront in Draft Regional Planning Guidance (2001), when the Panel concluded that the lack of integration of the various uses at Brierley Hill/Merry Hill militated against its recognition as a town centre. (Although they took the view that further retail growth “could be justified” - on regeneration grounds - as an exception to normal Government policy on out-of-centre development).

- In proposals in the Draft Dudley UDP (2002) to name Brierley Hill/Merry Hill as a Town Centre and allocate major retail development to take place in the period to 2011; effectively pre-empted by the decision not to identify the centre in RPG at that stage.

D2.34 That formal recognition is now justified as being essential if the Vision for the transformation of the Black Country is to be achieved, for the following reasons:

1. **An action programme is being implemented in a manner which overcomes the objection that Brierley Hill/Merry Hill does not comprise an integrated town centre.**

   The close proximity of the retail, leisure, and office developments to each other and to the nearby Brierley Hill town centre and
increasingly residential uses is providing the opportunity for their integration as a single functioning strategic centre. Through the Brierley Hill Area Development Framework and the Brierley Hill Master Plan considerable steps have been taken to bring this about. However the full achievement of this integration and the further diversification of uses are dependent upon an expansion of the core retail and office-based activities. This expansion can only be brought about in a controlled and integrated manner in the context that recognition as a strategic centre will bring. Such recognition will provide the necessary confidence for investment to take place and will trigger the substantial private sector financial contribution to Midland Metro.

The agencies for planning and delivery of an integrated town centre were originally faced with the adverse geography and topography of the area which militated against earlier integration of uses and connectivity between them. The strategy for connectivity includes breaching those physical barriers and distributing future land uses in a manner which emphases mixed use, being a characteristic of more traditional and long-standing town centres.

2. **The Black Country Centres and Regional Centres Studies both support designation as a Strategic Centre.**

Both of these studies, specifically undertaken to inform the current RSS Phase One and Two partial revisions, have concluded that further retail development at Brierley Hill/Merry Hill is required in order to meet current and future Black Country needs. They have also shown that this expansion can take place within a balanced development of the network of strategic centres, both for the Black Country and the Region as a whole, and have provided a basis for defining the parameters of this balance.

In respect of this balance, the Centres Study\(^7\) has highlighted a key difference from the situation when these issues were last examined in depth – i.e. the 1996 Inquiry. New investment in Birmingham City Centre and other centres (which were then seen as fragile) has now been completed or committed, with these centres in most cases “expanding strongly”\(^8\). The choice now for the Black Country is “.. whether to capture new investment and retain current market shares, or witness continued decline of the Black Country sub-region as Birmingham City Centre continues to grow and dominate the sub-region.”\(^9\).

\(^7\) Study of Black Country Centres, GVA Grimley, August 2005

\(^8\) Study of Black Country Centres, GVA Grimley, August 2005

\(^9\) Study of Black Country Centres, GVA Grimley, August 2005
It is important to note that the Study reached these conclusions within a context where a 43,500 sq.m gross comparison retail expansion at Brierley Hill/Merry Hill was treated as a “commitment”, for implementation before 2011. The Study took the view only that any “further major expansion of retail/leisure facilities beyond this level of growth” (our italics) should not be supported until the further growth of the other strategic centres has been secured\textsuperscript{10}.

The Regional Centres Study broadly reflects the conclusions of the Black Country Centres Study. It varies only in respect of the phasing of development at Brierley Hill/Merry Hill, to the extent that “further development in the retail and commercial leisure sectors (should be) postponed until after 2011 so as to allow existing centres to further progress their investment plans”. Nevertheless the Study is satisfied that “it is essential that the investors in Brierley Hill/Merry Hill are given the confidence that the centre will be confirmed as a strategic centre in this partial review of RSS”\textsuperscript{11}.

In practice this variation between the two studies is not material. The Consortium is satisfied that retail expansion (subject to the proposed criteria in respect of car parking and public transport infrastructure), is an essential catalyst for the overall changes we are seeking to bring about. However, the Consortium is also satisfied that implementing the necessary changes through the regional and local planning processes, and securing planning consent, would mean that retail expansion could not, in any event, come on-stream before 2011 at the earliest.

The Regional Centres Study recommending town centre status was prepared on the assumption that Dudley town centre would continue to maintain its strategic role. However, regardless of this assumption, the RSS Revision has identified that Dudley town centre will not continue its strategic role in the future and that essentially, Brierley Hill/Merry Hill is replacing it in the town centre network of strategic town centres in the Region.

This principle of replacement, possibly unique in the United Kingdom, further reinforces the case for recognition, and early recognition of Brierley Hill/Merry Hill as a strategic centre in its own right.

\textsuperscript{10} Study of Black Country Centres, GVA Grimley, August 2005

\textsuperscript{11} West Midlands Regional Spatial Strategy – Regional Centres Study, Roger Tym & Partners, March 2006.
3. **No other centre would have the capacity to meet the needs generated in the south western part of the Black Country**

The retailing studies (adapted to e-tailing growth) identify a potential demand for as much as 80,000 sq.m gross of comparison retail floorspace at Brierley Hill/ Merry Hill over the next 25 years, at least 75% of which is attributed to spending by Black Country residents. Historically the needs of this area have been met in Dudley town centre, and to some extent in smaller centres, most notably Stourbridge and Halesowen.

The Dudley physical capacity study\(^{12}\) identifies limited physical capacity in Dudley, Stourbridge and Halesowen up to 2031. Most of the potential land for retail growth land is unsuitable for modern comparison retailer requirements, without redevelopment of a scale that would compromise the distinctive character of the centres concerned. Only the Flood Street site in Dudley town centre, where there is a commitment including 15,000 sq.m of non food retailing could contribute effectively and this appears to be committed to a ‘retail park’ form of development rather than ‘high street’ comparison retailing.

Furthermore, other evidence indicates that, with the lowest rents and highest yields amongst Black Country strategic centres, Dudley Town Centre would not provide a market for comparison retail development, and, if this is true of Dudley, it would certainly be true of Stourbridge and Halesowen\(^{13}\).

Therefore, with major out-of-centre retail development no longer being acceptable under national and regional policy, there is no alternative but to meet the needs of this part of the Black Country at Brierley Hill/Merry Hill. The Masterplan for Dudley Town Centre which confirmed a change in its strategic role is now adopted SPG.

4. **Brierley Hill/Merry Hill is well located geographically to meet the retail and other town centre needs arising in this part of the Black Country.**

Brierley Hill is central to the built-up area of the south western part of the Black Country. It is 4 km further from West Bromwich, from Wolverhampton and from Walsall than is Dudley town centre and is therefore well placed to fulfil a role within a balanced ‘four-centres’


\(^{13}\) Investment Analysis and Future Investment Potential of the Black Country Retail Centres, Chase & Partners, March 2006.
strategy, with each centre meeting the majority of needs within its own ‘segment’.

5. **Brierley Hill/Merry Hill is located within a relatively disadvantaged area in need of regeneration**

   The immediate catchment area of Brierley Hill includes most of the more deprived wards of Dudley borough. At the same time its wider catchment, both within and beyond the Black Country embraces a wide social mix, enabling the centre to sustain a broad range of services from which all can benefit.

6. **Merry Hill/the Waterfront already exists as a strategic retail, leisure and office location**

   Whilst the origin of the development was undoubtedly contingent upon the closure of Round Oak Steelworks and the declaration of the Enterprise Zones(s) it is now clearly a key strategic location with its own growth dynamic. It is the second largest retailing centre in the West Midlands and one of the biggest concentrations of public and private sector office activity outside central Birmingham; a situation that quite clearly provides a foundation for sustained and continuing growth.

7. **Brierley Hill/Merry Hill will materially help to prevent further leakage of retail spending from the Black Country.**

   White, Young, Green have assessed the implications upon leakage under scenarios which included and excluded growth at this centre. (16a). They concluded that:

   - The other three Black Country strategic centres could not realistically accommodate the scale of the retail growth intended for Brierley Hill/Merry Hill.
   - The absence of Brierley Hill/Merry Hill growth would materially increase leakage of retail spending from the Black Country.

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D2.35 There may be concern by some that the formal recognition of Brierley Hill/Merry Hill as a ‘town centre’ could set a precedent for national policy in respect of other out-of-town centres. For this reason the Consortium commissioned an extensive review of the ‘top 10’ out-of-centre Regional Shopping Centres nationally and their relationship to planning policies.  

D2.36 It concluded that the only reasonable parallel, i.e. a centre embedded within a major urban area and with associated regeneration potential, is Brent Cross in north-west London. Here 1996 proposals for retail

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14 Assessment of Major Out-of-Centre Retail Outlets in the UK, White, Young, Green, May 2006.
expansion were eventually refused (December 2003) on grounds similar to those at Merry Hill – i.e. Brent Cross did not currently function as a town centre (and sequentially preferable sites were available). However the final London Plan (2004) now recognises the wider Cricklewood/Brent Cross area as an ‘Opportunity Area’ to include “the redevelopment of Brent Cross as a town centre”. These proposals are being carried forward through the medium of the Barnet Unitary Development Plan (for adoption in mid 2006) and in the Brent Cross and West Hendon Development Framework which will be adopted as Supplementary Planning Guidance. Meanwhile the owners of Brent Cross and Cricklewood Regeneration Ltd are working together to prepare a comprehensive planning application for the regeneration of the area, embracing, in addition to the expansion of the shopping centre, a wide mix of uses; enhancement of the public realm and of public transport access; and improved integration with surrounding areas; an approach wholly reflected in the ongoing initiatives at Brierley Hill/Merry Hill.

D2.37 There are close parallels with the framework that is being put in place at Brierley Hill. The White Young Green Report\(^\text{16}\) draws clear distinctions between Brierley Hill/Merry Hill and most out of centre shopping malls included in their Study. The circumstances of Brent Cross and Brierley Hill/Merry Hill are similar in respect of the opportunities existing and being created for urban integration and regeneration as well as the roles performed by the town centre uses involved. This report identifies key initiatives and arguments which apply to both Brent Cross and Brierley Hill/Merry Hill, namely:

- Both lie adjacent to/surrounded by residential areas where travel to shops by foot is possible;
- Key infrastructure improvements are capable of funding derived from justified retail growth;
- Both centres have strong, central and catalytic roles in local and wider regeneration;
- Both lie within established metropolitan urban areas;
- Both have retail as an integral component of local mixed use development;
- Growth is contingent upon provision of improved public transport and accessibility;
- Early retail growth helps to meet need, secures sustainability improvements and funds infrastructure;
- Criteria to be met to achieve town centre status include need; a defined scale of growth that relates to other relevant centres need; public transport improvements and pedestrian penetration;
The key differences between Brent Cross and Brierley Hill/Merry Hill are:

- Brent Cross maintains free car parking. (Brierley Hill/Merry Hill will shortly introduce parking charges and a Vehicle Management System that facilitates parking efficiency).

- Brent Cross’ town centre status is being endorsed via strategic and local development plan frameworks. (Brierley Hill/Merry Hill town centre status is sought initially through RSS which in itself forms part of the development plan, but is supplemented by a locally-accepted action framework and a forthcoming Area Action Plan that will reflect the policy context of the RSS Phase One Revision.

**Centres Action Point 2 - Define the Scale of Future Growth for each of the Strategic Centres**

D2.38 It will be vital that the potential long term scale of growth in the strategic centres be kept under regular review. However it is essential that key guidelines in respect of retail and office growth should be introduced into the Regional Spatial Strategy and in particular it identifies what scale of development would be acceptable at Brierley Hill/ Merry Hill in the short term, consistent with the four-centres strategy.

**Retail**

D2.39 The Black Country Centres Study includes projections of the need for comparison retail floorspace up to 2031, both for the strategic centres and for the Black Country catchment area as a whole. In interpreting its results a cautious approach was adopted in order not to overestimate potential demand generally, and at Brierley Hill/Merry Hill in particular:

- In its detailed calculations the Black Country Centres Study assumed that internet spending will remain constant as a proportion of all retail sales. However, it has now been decided to assume that this form of trading will in fact increase, to claim a 20% of comparison spending by 2021 (see Para. D2.24 above).

- This scale of growth in e-tailing is regarded as optimistic (i.e. at the higher end of its potential growth). Insofar as this level was used in the Regional Centres Study, as a basic assumption, the Consortium has adopted it for calculations of future floorspace need. However, even more recent work by Experian has concluded that e-tailing growth may level off at 12% by 2014. The consequences of this assumption as an alternative are contained in the White, Young, Green Report.16
This reflects both the material impact that different assumptions on e-tailing may have on retail floor space growth, and the need for continuous monitoring of e-tailing to ensure that floor space assumptions can be adapted in response.

The Study, with its Vision-led (but market sensitive) approach, also predicts a particular concentration of demand in the largest Black Country centres including Brierley Hill/Merry Hill. It indicates that 34% of potential demand (2004-31) in the four centres combined will accrue to Brierley Hill/Merry Hill under a high growth scenario, with an even higher proportion (43%) if current trends continue. This was unlikely to be consistent with the balanced pattern of growth being sought. Given the extent to which the core catchments of the various Black Country centres overlap it was considered that some re-allocation of growth should be feasible, with Brierley Hill/Merry Hill’s share reduced to 28%, and with the smallest centres, Walsall and West Bromwich significantly strengthened. (Table D2.2). Thus while Wolverhampton and Brierley Hill/Merry Hill will remain the largest retail centres in the Black Country, the amount of new growth allocated to Walsall and West Bromwich is greater than their present size would justify and the gap between the four centres is intended to narrow materially.

Table D2.3: Shares of Retail Floorspace Growth (%), Strategic Centres, (2004-31)

<table>
<thead>
<tr>
<th>Centre</th>
<th>BC Centres Study</th>
<th>Policy Adjusted</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Trend %</td>
<td>Vision %</td>
</tr>
<tr>
<td>Brierley Hill/Merry Hill</td>
<td>43</td>
<td>34</td>
</tr>
<tr>
<td>Wolverhampton</td>
<td>30</td>
<td>26</td>
</tr>
<tr>
<td>Walsall</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>West Bromwich</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: Black Country Consortium/Various

D2.40 In order to quantify the actual amounts of retail growth to be accommodated in each centre, account was taken of projections in the parallel Regional Centres Study. This assumes a greater proportion of retail spending via the internet than did the GVA Study. However, with this divergence allowed for, the regional study predicts a somewhat bigger growth in floor space demand across the Black Country centres during the period to 2021 than does the GVA Study (under comparable scenarios corresponding to the Vision). Given that the regional study was undertaken more recently and incorporated some more up-to-date assumptions, the Consortium decided to adopt its overall growth figure as a ‘control’ on allocations to the four centres. The effect, as far as Brierley
Hill/Merry Hill is concerned, is to temper somewhat, (but by no means cancel out) the cautious effects of e-tailing and adjusted market share assumptions. Thus the amount of growth being anticipated at Brierley Hill/ Merry Hill remains substantially less than initially forecast in the GVA Centres Study.

D2.41 The overall outcome in terms of the amount of growth allocated to each centre is summarised in Table D2.4.

D2.42 Any formal redefinition of the status of Brierley Hill/Merry Hill as a town centre will at an early stage reactivate proposals for retail expansion. The Consortium have therefore proposed shorter term guidelines for an acceptable level of retail expansion to be incorporated into the Regional Spatial Strategy up to 2016. These guidelines need to be:

1. Consistent with the level of growth (up to 51,000 sq.m gross of comparison shopping) allocated to Brierley Hill/ Merry Hill for the whole period to 2021.

2. Of a scale that would not impede the early implementation of planned comparison shopping developments in Wolverhampton, Walsall and West Bromwich, where progress towards growth is well under way.

D2.43 The Consortium were satisfied that a limit of 36,000 sq.m gross by 2016 - broadly equivalent to a pro rata stage in achieving 51,000 sq.m gross by 2021 – would meet these criteria, providing that it was accompanied by a requirement that further growth (beyond the specified 2016 level) would be subject to review within the development planning framework, and in the light of the strategy as a whole.
### Table D2.4: Strategic Centres Summary of Spatial Implications (net additions 2004-21 + 2021-2031)

<table>
<thead>
<tr>
<th></th>
<th>Wolverhampton</th>
<th>Brierley Hill / Merry Hill</th>
<th>Walsall</th>
<th>West Brom</th>
<th>Total Centres</th>
<th>Rest of Black Country</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comparison retail (’000 sq.m gross)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004-21</td>
<td>54.0</td>
<td>51.0</td>
<td>45.0</td>
<td>35.0</td>
<td>185.0</td>
<td>50.0</td>
</tr>
<tr>
<td>2021-31</td>
<td>29.0</td>
<td>29.0</td>
<td>23.0</td>
<td>18.0</td>
<td>99.0</td>
<td>44.0</td>
</tr>
<tr>
<td><strong>Total 2004-31</strong></td>
<td><strong>83.0</strong></td>
<td><strong>80.0</strong></td>
<td><strong>68.0</strong></td>
<td><strong>53.0</strong></td>
<td><strong>284.0</strong></td>
<td><strong>94.0</strong></td>
</tr>
<tr>
<td><strong>Offices (1) (’000 sq.m)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004-21</td>
<td>187.0</td>
<td>187.0</td>
<td>187.0</td>
<td>187.0</td>
<td>748.0</td>
<td>125.0</td>
</tr>
<tr>
<td>2021-31</td>
<td>138.0</td>
<td>138.0</td>
<td>138.0</td>
<td>138.0</td>
<td>552.0</td>
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Source: Black Country Consortium/Various

(1) Includes allowance of 100,000 sq m of A2 floorspace to be divided evenly between the 4 centres.

### Offices

D2.44 Assessment of potential office demand, is derived from the GHK Economic Strategy and subsequently endorsed by the Employment Land Availability Work. This indicates a potential requirement, under the Vision scenario, for some 1.45m sq.m of new office accommodation over the Black Country as a whole by 2031. The Consortium have taken a relatively simplistic approach to allocating this growth, taking the view that in support of the strategy and for reasons of sustainability it is desirable that the great majority of the office development should be concentrated in the strategic centres. There is approximately 100,000 sq.m already committed, almost all out-of-centre; nearly half of which is on the northern periphery of Wolverhampton. The Consortium assumed that all of these commitments will be implemented by 2021 and that remaining potential (other than a relatively small allocation of ‘Class A2 offices’ - offices to which the public have regular access like banks and building societies) will all be located in the strategic centres. Any B1 (a) office development at I54 lies outside the Black Country although the sites development is to be of considerable economic significance to the sub-region.

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D2.45 The Regional Centres study includes office growth (up to 2021) under various scenarios. These identify between 42% and 44% of the total growth region-wide to the 26 strategic centres. That Study however, in respect of office growth, was founded upon both trends and market assessments. The extent of B1(a) office development in the Region that is being developed out of centre currently represents 76% of the total floorspace, largely on greenfield business parks.

D2.46 Whilst this emphasis reflects current market circumstances, the Black Country Strategy seeks to reflect Government Policy, as embodied in PPS6, to promote office development in centres as part of mixed use and multi-functional centres’ renaissance.

D2.47 Thus the Consortium, as reflected in the RSS Phase One Revision, seek to promote over 85% of future B1(a) offices floor space in the four strategic centres. The ultimate success of this ambitious approach will rely upon market confidence in these locations and complementary policies across the Region.

D2.48 The allocation between centres on an equal shares basis, adapts the Regional Centres Study, whose assumptions for offices in the four Black Country centres (under a Black Country growth scenario) range from 33% in Wolverhampton to 15% in West Bromwich. However, the Consortium felt that both were reasonable aspirations against which to test capacity, reflecting the more detailed and locally-sensitive work carried out for the Black Country Study.

Centres Action Point 3 – Develop a USP for each Centre

D2.49 To shape the development of the strategic centres, the Consortium propose to develop key specialisms and new complementary roles. In doing so, the whole of the Black Country will offer more than the sum of its parts. Each of the four strategic centres will have a ‘unique selling point’ (USP):
Centres USPs:

- Wolverhampton as ‘the City in the Black Country’, its traditional capital with its University and administrative functions; a learning hub complemented by major cultural, sport and leisure facilities.

- Brierley Hill/Merry Hill as a major shopping centre and commercial leisure destination. Young, growing and restructuring itself with exciting developments.

- Walsall with its industrial heritage, blend of historic architecture and new developments, vibrant evening economy and cultural offer: traditional and specialist.

- West Bromwich – reborn as a new centre with sub-regionally significant retail and commercial leisure, which also serves as a major office and employment location.

Centres Action Point 4 – Implement a Comprehensive Strategy for Each of the Four Strategic Centres

Wolverhampton City Centre

D2.50 To acknowledge **Wolverhampton** as the City in the Black Country with its expansion complementing Birmingham (Eastside) and Coventry (Swanswell) as a key focus of regeneration in the City Region.

D2.51 Wolverhampton is distinct from the other Black Country centres in a number of regards: the headquarters of a daily newspaper, professional theatre, served by main line rail and with its own University – on an in-centre site. The strategy will build upon these characteristics and the potential for Wolverhampton to parallel Coventry to the east as ‘second cities’ within the Birmingham City Region. Birmingham, with its ‘Eastside’ project, is embarking on a further major phase of city centre expansion and Coventry likewise in the Swanswell area.

D2.52 The centre strategy should reflect Wolverhampton’s city status and its role as the traditional capital of the Black Country. The masterplan should incorporate up to 80,000 sq.m of retail, 325,000 sq.m of offices and new dwellings. A major image enhancement package is also required, prioritising improvements to the environment and public realm.

D2.53 Wolverhampton will help drive the transformation of the Black Country towards a knowledge-based economy, leading on innovation and learning. Both will require the University to be a much more significant driver of change; in particular, by enhancing its research capabilities and attracting more students from outside the Black Country.
D2.54 Unlocking the potential of Wolverhampton City Centre, also needs the centre to break out beyond the ring road which currently acts like a collar around the centre, constraining growth. A major expansion of the retail core within the ring road is imminent but there are major opportunities for other central area uses including offices and leisure in areas beyond, in particular the canalside quarter on the eastern side of the centre. Here, in a belt extending from the former Royal Hospital in the south via the ex Low Level Station to the former Springfield Brewery there are major opportunities in close proximity to the enhanced rail station and associated public transport interchange.

**Brierley Hill/Merry Hill Centre**

D2.55 Implementing the Brierley Hill Masterplan through an Area Development Framework to consolidate a town centre for the southern Black Country. With over 150,000 sq.m of retailing, 70,000 sq.m of offices, a multiplex, eating and drinking venues, a major hotel and nearly 12,000 jobs the Merry Hill/Waterfront complex is already *de facto* a major strategic centre. The Area Development Framework, adopted as supplementary planning guidance within the Dudley UDP and the Brierley Hill Partnership’s subsequent masterplan seek to ensure that further evolution is seamlessly integrated with the nearby Brierley Hill High Street and with surrounding (existing and new) uses to form a genuine ‘town centre’. This will be further reflected in the forthcoming Area Action Plan.

D2.56 Considerable strides have been made – the enhancement of the canal corridor, pedestrian links to the Waterfront, the introduction of housing and the consolidation/replacement of surface parking in multi-storey form. Further development must ensure a major contribution to a) integration and b) wider diversification of uses. Through the Partnership and other means, the centre will genuinely meets the needs of local communities, both in terms of the facilities provided and of access.

D2.57 Midland Metro, serving both the Waterfront and Merry Hill, and terminating at Brierley Hill High Street will make a major contribution to this integration. It is for this reason as well as enhancing modal choice that it is essential that Metro should be in place before any significant retail expansion comes on stream. Other developments in public transport access (e.g. a new bus station) need to be integrated for maximum interchange with Metro.

D2.58 New development/redevelopment must be in a form which promotes mixed uses – in particular residential (there is scope for 2,700 dwellings to 2031) and leisure/culture related - and to increasing the permeability of the centre.

**Walsall Town Centre**

D2.59 Walsall town centre has the potential to consolidate itself as a sub-regional centre serving a relatively self contained catchment area in the north
eastern sector of the Black Country, in the form of a traditional market town.

D2.60 The Walsall Urban Regeneration Company has a masterplan based on the attraction of £600m public/private sector investment to the central area over the next 10/15 years, including a Business and Learning Quarter and the Waterfront development.

D2.61 The retail property market is reasonably buoyant and there is market interest in major redevelopment and remodelling in the area of Old Square, Digbeth and High Street, potentially anchored by a new large foodstore and to include a new and larger department store.

D2.62 An updated masterplan will need to guide the anticipated expansion by around 68,000 sq.m of comparison retail and the incorporation of up to 325,000 sq.m of office space over the next 25 years. There is also a growing market for central area housing.

**West Bromwich Town Centre**

D2.63 Implementing the West Bromwich Masterplan. Of the four strategic centres West Bromwich faces the biggest challenge in establishing a stronger role as a strategic centre, given that it is only 5 miles from Birmingham city centre and has a predominantly low income catchment area. However, its high accessibility gives it significant potential. A new approach is required. A regeneration company (‘RegenCo’) has been established and will take forward the schemes in its masterplan including the new Town Square, retail expansion and office developments. A retail development anchored by Tesco is imminent and other key proposals for the centre have included ‘The pUBLIC’ – a ground breaking interactive arts centre in a new iconic building, and the new Sandwell Central College.

D2.64 The masterplan will need to be extended to accommodate the 53,000 sq.m of retail, 325,000 sq.m of offices and new dwellings, which could be accommodated at the centre over the next 25 years.

**Centres Action Point 5 – Support Residential and Tourism Development in Dudley Town Centre**

D2.65 In contrast to Brierley Hill/Merry Hill, Dudley Town Centre’s role has diminished and its capacity for expansion without damaging the local heritage and environment is limited. A clear strategy for the centre is needed to reflect its changing role following its formal replacement by Brierley Hill/Merry Hill as the strategic centre in the south west of the Black Country. This will include a major tourism package for repositioning Dudley’s role within the Black Country economy. It must build on existing strengths including tourism assets such as Wrens Nest (Britain’s first urban National Nature Reserve), Dudley Zoo and the Black Country Museum.

D2.66 Existing commitments in Dudley Town Centre will meet local shopping needs at least through the RSS period. There is a potential retail element
within the proposed remodelling of the Zoo area but this will be in a form that contributes to Dudley’s leisure/tourism role.

D2.67 The proposed routing of the Brierley Hill Metro line on-street through Dudley town centre is a key element both in enhancing accessibility and in contributing to environmental improvement. It will contribute fully in both ways.

D2.68 The promotion of further housing use in the centre is a key element of the strategy. The masterplan for Dudley Town Centre adopted as SPG is being implemented.

Centres Action Point 6 – Create an Integrated Transport System

D2.69 Proposals for a new public transport network – ‘Black Country Express’ – will integrate metro, rail and bus services, enabling the Black Country to become a true polycentric network of centres. Transport plans are outlined in more detail in Section D7 of this report. Improved public transport to and between the four key centres is a key focus within the transport strategy.

D2.70 Birmingham and the Black Country is the largest European city-region not to have a comprehensive light rapid transit system. The existing Metro ‘Line 1’ between Birmingham and Wolverhampton has played a key role in improving communications, and plans to extend the network are a high priority. The development of the branch southwards from Wednesbury through Dudley to Brierley Hill is vital to consolidating Brierley Hill/Merry Hill as a strategic centre as well as consolidating the changed role of Dudley town centre. The further extension northwards from Wednesbury to Walsall and then via Willenhall and Wednesfield to Wolverhampton (the 5-Ws route) will mean that all the Black Country’s key centres are linked by this mode – both with each other and with Birmingham.

Centres Action Point 7 – Provide New Cultural, Sport and Leisure Facilities for the Black Country’s 1m plus Residents and the Wider City Region

D2.71 The Black Country contains major cultural facilities significant to the whole Birmingham City Region – the Walsall Art Gallery, Dudley Castle & Zoo, the Black Country Museum, University of Wolverhampton’s English Institute of Sport Judo Centre, and the emerging “the pUBLIC” cultural and learning centre in West Bromwich. However the overall range of leisure and cultural facilities available to our residents is limited. There is no provision of major multi-dimensional facilities spanning a range of culture, sport and tourism activities in shared locations which if provided would expand the choices required to meet future needs of diverse peoples. Even taking account of proximity to Birmingham the opportunities are less than the area could and should sustain, and certainly inadequate to support the major economic and social transformation that we intend to bring about.
D2.72 The area of leisure/sport/culture is one where forecasting is notoriously difficult. The GVA Centres Study highlighted a number of key trends:

- Technological innovation - multi channel TV, the internet - leading to more home-based leisure (and learning);
- At the same time more eating out – fuelled by more people in employment, higher incomes and long working hours;
- Growth of some shared activities particularly those with an ‘individual’ clientele - visits to the cinema, to health and fitness centres, for example.

D2.73 The Centres Study quantifies two sectors of ‘commercial leisure’ – demand for cinemas and for casinos. In the cinema sector it is estimated that under a growth scenario, the population of the Black Country boroughs alone will generate capacity for a further 50 cinema screens by 2021 and another 20 by 2031, on top of the current total of 56. Merry Hill contains a multiplex but elsewhere provision is largely out of centre, with Wolverhampton, Walsall and West Bromwich all having lost their remaining in-centre cinemas in recent years. The introduction of a major cinema complex into each of these three centres should be seen as a key ingredient of their future roles. It is understood that a multiplex is likely to be incorporated within Wolverhampton’s core expansion. The Regional Centres Study has named Walsall and West Bromwich amongst the three centres region-wide where a major new cinema is most urgent and master planning exercises for these centres should identify suitable sites, well integrated with other uses and with public transport. In addition, it would be consistent with the role envisaged for Wolverhampton, that this centre should be capable of sustaining also at least one specialist ‘arthouse’ cinema.

D2.74 New cultural and leisure facilities generally should be concentrated in the strategic centres including Wolverhampton, in keeping with its role as ‘City within the Black Country’ and a learning hub, and Brierley Hill/Merry Hill to reflect its increasing role and popularity as a leisure destination. Brierley Hill/Merry Hill should be capable of providing a major quality and sustainable multi-dimensional facility to meet the variety of family and individual demands, building upon the proposed National Youth Theatre. Quality sports facility provision within the strategic centres should be of an indoor specialist nature. They should at least serve the needs and aspirations of the 1m plus Black Country residents and workers, but also they should aim to be of city region and regional status, attracting national/international competitions and training facilities and nurturing the development of Black Country sports performers.

D2.75 The strategic centres will also be promoted as key locations in the further development of the tourist appeal of the Black Country, including Wolverhampton and Walsall with their concentrations of historic buildings and cultural facilities. However, Dudley town centre is also a key focus, given its central location within the Black Country and its already
established attractions – the Black Country Museum, the Castle/Zoo complex and Wren’s Nest in particular. Tourism plays a key role in establishing a new role for Dudley town centre.

D2.76 The step change in the Black Country economy will also generate much more business tourism. The sub-region is well placed to tap into the business tourism market of Birmingham, including international business tourism, which continues to grow. This means quality hotels in accessible locations where the visitor can make use of local services and visit local attractions. Predominantly this must mean location in the strategic centres.

**Centres Action Point 8 – Create new centre-based residential environments to contribute to population growth and diversity**

D2.77 Based on the current market and demographic profile, there will be sustained growth in city living in Wolverhampton and over time, in Walsall, Dudley and the wider Brierley Hill area, and West Bromwich. The scope to attract city living as part of West Bromwich town centre is likely to be more dependent on the changing nature of its catchment, and on improving its retail and leisure functions to improve market perceptions as a place to live.

**Centres Action Point 9 – Support to smaller local centres**

D2.78 The smaller centres – e.g. Bilston and Bloxwich, Wednesbury and Cape Hill - have experienced a long process of change: polarisation of comparison shopping towards the strategic centres in the 1960s and ‘70s; subsequent competition from out-of-centre stores; and the general decline of Black Country market share. Those in the south of the area, like Halesowen and Stourbridge, Cradley Heath and Blackheath, have had the added pressure of adjusting to the nearby presence of Merry Hill. However, most have now achieved a measure of stability, concentrating on the convenience shopping and other service needs of local communities. Traffic and other environmental conditions have been improved and in several cases large foodstores have located within the centres, reinforcing their retail role.

D2.79 Strategy of concentrating key investment in the four strategic centres will not lead to neglect of these smaller places. The ‘residual capacity’ for comparison shopping being available to these centres (see Table D2.3) may appear relatively modest. In reality however, except possibly for a few centres close to the motorway network, ‘the market’ would be very unlikely to bring comparison shopping or office development on any significant scale. Nevertheless, all the smaller centres will experience growth in terms of their core functions, in particular making day-to-day provision for local needs. Proposals will therefore support the organic growth of smaller centres rather than rapid expansion.
D2.80 Underpinning many aspects of the approach to centres - and indeed of the strategy generally - is an explicit recognition of the Black Country’s relationship with Birmingham. The Black Country is quite clearly part of a ‘Birmingham City-Region’, a dynamic entity of nearly three million people embracing not just the Birmingham/Solihull/Black Country ‘conurbation’ but including Telford in the west and Coventry in the east.

D2.81 Birmingham is quite clearly a ‘Core-City’, in a context where such places are more and more recognised as key drivers of growth nationally and internationally. To the extent that there has been a transformation in the West Midlands over the past two decades it is very much associated with the city’s role generally and that of its city-centre in particular. This is quite clearly articulated through the regional spatial strategy, which promotes Birmingham as “a major regional capital of European and international standing” and thereby gives Birmingham city centre a unique role within the region’s network of strategic centres.

D2.82 At the same time the Black Country has a distinctiveness based on its industrial base and heritage, and a proud history of separate administration. In recent years this distinctiveness has generated an increasing feeling of coherence across the area; a clear sense that ‘the Black Country’ constitutes an entity in its own right, with its own commonality of interest. This is reflected in the creation of the Black Country Consortium and the development of the Black Country 30 year Vision and Black Country Study – a distinctive strategy for the urban renaissance of the Black Country with an emphasis on the growth and inter-connectivity of its centres and a requirement for transformational environmental renewal involving significant restructuring of its traditional industrial land base.

D2.83 As a contiguous urban area of 1.1 million people focused around its own network of long established town centres, the Black Country’s relationships with Birmingham are two way in nature. Indeed the prospectus of the City-Region Forum to which the Black Country subscribes emphasises the benefits of interdependence and of exploiting the polycentric nature of the Birmingham city region.16

D2.84 This is quite clearly the context within which the strategy for centres has been developed. Birmingham by virtue of the scale and nature of its market can sustain a level of speciality retailing, of business and professional services and of leisure and cultural facilities which cannot be replicated at individual Black Country centre level. Indeed all benefit from

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16 Creating a Distinctive European City Region, A First Prospectus for the Birmingham City Region, Birmingham City Council and other Member Authorities, 2003.
having these facilities concentrated in a regionally accessible location. However there are major benefits to be derived from maintaining a healthy network of centres in the Black Country to meet the majority of needs locally. These include promoting sustainability and minimising the need to travel; consumer choice; and the pivotal role that growing Black Country centres can play as multi-purpose catalysts for regeneration and transformation. Indeed it is part of the philosophy of the polycentric city region that the sum of a number of individual poles of activity, of learning and of entrepreneurship, will be likely to be greater than if they were all concentrated in one location.

D2.85 Thus while the Consortium recognises that some leakage of retail trade, reflecting the highest level of specialisation will continue, increased leakage can and should be minimised in order to maintain a network of complimentary yet competitive centres, a network within which the emerging ‘new centre’ at Brierley Hill/Merry Hill has a key role to play. Likewise in the offices sector, although the most specialised financial, business and professional services may remain concentrated in Birmingham, the Solihull and Coventry areas demonstrate that other poles of activity can be sustained within the City Region. Whilst other factors – proximity to Birmingham Airport and to the ‘South East’ – no doubt play a part, there is no reason why a similar situation cannot be replicated to a degree to the north and west of Birmingham in the Black Country. Indeed it is essential that this be so if the transformation of the Black Country is to come about.

**PRIORITIES FOR ACTION**

D2.86 The overarching aim to **accelerate the growth of the knowledge-based economy** has already highlighted the key priority of focussing investment on the growth and transformation of the four strategic centres. The Consortium has identified certain priority action in order to accelerate the growth of retail, leisure and office-based activity in each centre. Likewise as one of the key objectives in pursuit of **building a high quality housing market** the aim is to promote urban living by securing more residential growth in all four strategic centres - and in Dudley.

D2.87 Analysis of the centres themselves, and the ten point plan, endorses all of these and highlights the following for early action:

- Designate Brierley Hill/Merry Hill as a strategic centre through the RSS Phase One Revision process.

- Prepare and implement master plans in, Wolverhampton, Brierley Hill/Merry Hill, Walsall and West Bromwich to provide the detailed implementation framework for the scale of mixed uses and their connectivity.

- Implement the masterplan for Dudley to guide its adaptation to a new role with a strong tourism offer.
The process of the Borough’s individual or combined Local Development Plans via Joint Core Strategy will be central to the Implementation Plan.
D3 BUILDING A HIGH QUALITY HOUSING MARKET

THE BLACK COUNTRY COMMITMENT

D3.1 The Black Country authorities are committed to achieving growth in the Black Country through the achievement of the shared Black Country Vision.

D3.2 The housing component of this study examines housing legacy of the Black Country. This related to the nature of historic housing stock, the limited range of stock and new build, and the responses to these issues by the market. It is clear that historically, the limits of supply have either facilitated peoples’ move out of the Black Country or have helped to suppress latent demand. The demand for housing is an increasingly fluid situation, with constant changes in the scale of demand, variations between parts of the sub-region, and the changing aspirations of different groups within the Black Country.

D3.3 The assessment of the historic trends and scale of problems is important to show the magnitude of change required in the next 25 years if the Black Country is to meet the challenge of reversing net out-migration and retaining its internally generated demand as set out in Regional Spatial Strategy. The Black Country local authorities and their partners in the housing sector have already responded to this challenge, particularly in recent years. The uplift in the housing market nationally has been met positively in this sub-region by both the house building industry and the more adaptive, yet planning policy driven, response by the local authorities. The process of recycling previous employment land for housing has accelerated and in places the scale of change has contributed to wider area uplift beyond individual site regeneration. This wider area improvement is critical to providing a higher quality living environment necessary to combat out-migration and meet local peoples’ aspirations for twenty first century living.

D3.4 The success of the recycling process has helped to absorb what has been a latent housing demand suppressed in the past by shortage of new stock in terms of house types, price, location and scale. The local authorities are aware of the increasing scale of housing demand and the scale of the housing provision required to fulfil strategy. The housing-led redevelopment of the Coors Brewery Site in Smethwick is a classic opportunity to meet both demands in general and the range of local needs for a variety of house type and tenure.

D3.5 This chapter sets out how the Black Country Study has tested the implications of the new challenge of accelerating house building rates to meet at least the minimum figures set out in RSS and to continue that same momentum of change at least to 2031. This demonstrates the capacity in the Black Country to meet this challenge, principally by more intervention to release poor quality employment land in appropriate locations, in a sustainable manner.
D3.6 The Black Country local authorities recognise the magnitude of land recycling needed, and the complexities of land assembly, restoration and viability assessment to ensure a continuous flow of land to the market. The signs are that the private sector (as landowners and house builders) are accelerating their response to these needs. However, in parallel it is essential that the portfolio of quality employment land is protected and fully utilised for employment to ensure that the balance between land transfer to housing, and provision of sufficient quality jobs is maintained.

D3.7 To achieve the Black Country Vision and contribute to City Region competitiveness means that quality of employment and building and community cohesion must be equal outcomes of housing growth – not just numbers, with a recognition by house builders as to the varied and discreet markets that make up housing demand.

D3.8 The transformation in housing supply which is now well under way has to be maintained and accelerated. It represents in itself a major contribution to the city region growth agenda. Achieving RSS minimum house building targets alone will mean that net out-migration would not only have been reversed but also from 2011 the Black Country will be a sub-region of net in-migration equivalent to 1,600 persons pa rising to 3,200 pa from 2021.

D3.9 Equally the housing component of Black Country Strategy is inseparable from growth in jobs, retail, leisure transport developments; all components are intertwined and need to be fulfilled if the strategy as a whole is to be accomplished.

D3.10 The response that the Region develops to increased household projections to 2026 represents an additional challenge to the Black Country as well as the Region as a whole. However, the sub region is well informed by recent land capacity studies which will provide an up to date framework for the local planning authorities to contribute to that wider debate.

**THE HOUSING MARKET TODAY**

D3.11 While many people still move to live in the Black Country, there is currently a net outflow from the sub-region of 4,000 people each year. Only two other sub-regions are experiencing population decline\(^1\). All the evidence from the housing workstream indicates that the lack of quality and choice in the housing market are primary drivers behind this decline.

**Low value private housing and high levels of social housing stock**

D3.12 Existing Black Country communities are to a large extent the products of the Black Country’s development over the last century, and particularly its industrial heritage. Mining and manufacturing attracted concentrations of high density, poor quality private rented housing which transferred into low

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\(^1\) Black Country Housing Market Thinkpiece, CSR Partnership, June 2004
value owner-occupied stock over the period 1950 to 1980. Consequently, today much of the Black Country represents a large area of uniform low value private housing.

D3.13 **Table D.3.1** demonstrates how the Black Country is surrounded by a band of higher values; these form an arc running from Lichfield in the north east through Stafford, South Staffordshire and Bridgnorth, and into Wyre Forest and Bromsgrove to the south.

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<td>W’ton</td>
<td>49.6</td>
<td>50.2</td>
<td>53.0</td>
<td>53.3</td>
<td>58.4</td>
<td>61.2</td>
<td>68.3</td>
<td>80.1</td>
<td>93.6</td>
<td>115.1</td>
<td>121.9</td>
<td>145.7</td>
</tr>
<tr>
<td>Telford and Wrekin</td>
<td>51.4</td>
<td>54.4</td>
<td>58.3</td>
<td>62.9</td>
<td>67.1</td>
<td>71.4</td>
<td>79.0</td>
<td>93.0</td>
<td>105.9</td>
<td>128.8</td>
<td>137.4</td>
<td>167.3</td>
</tr>
<tr>
<td>Wyre Forest</td>
<td>60.1</td>
<td>60.8</td>
<td>67.0</td>
<td>71.1</td>
<td>79.5</td>
<td>83.9</td>
<td>99.6</td>
<td>112.9</td>
<td>130.0</td>
<td>155.5</td>
<td>161.0</td>
<td>167.9</td>
</tr>
<tr>
<td>Region</td>
<td>59.1</td>
<td>61.3</td>
<td>65.8</td>
<td>70.6</td>
<td>76.9</td>
<td>84.2</td>
<td>94.5</td>
<td>110.6</td>
<td>123.6</td>
<td>148.1</td>
<td>156.83</td>
<td>165.36</td>
</tr>
</tbody>
</table>

**SOURCE:** HMLR, SPECIAL PURCHASE

2 2004 and 2005 data are taken from quarter April to June.
Map D.3.1.1 Percentage change in Average Dwelling Price, 1995-2005

Percentage change in Average Dwelling Price, 1995-2005
Source: HWU, CSR, Ecotec

172 to 181
162 to 172
151 to 162
142 to 151
D3.14 For much of the post-war period and earlier, the Black Country saw significant population growth. The villages and communities at the heart of the sub-region associated with industrial enterprise expanded. Between 1950 and 1970, the Black Country's population grew by 115,000 (11%) and 84,000 households (+28%); this rapid growth was supported by unprecedented growth of the dwelling stock (+104,000) to accommodate household growth and the post-war shortage.

D3.15 The post-war expansion was poorly planned with spaces between the traditionally separate Black Country settlements being filled in by a multitude of housing estates reflecting the 18 separate local authorities existing in the Black Country at that time. Much development also took place on former industrial land made derelict by the closure of industry with little attention to environmental enhancement.

D3.16 Owing to the Black Country’s industrial past and the need for relatively low cost rented housing, the expansion in population was accommodated predominantly by local authority housing, but with some increase in private house building also evident. Historically, therefore, there have been high levels of social housing stock in the Black Country. Figures D3.1 & 2 demonstrate the impact of recent policies of clearance of unpopular high rise blocks and of 'right to buy' in reducing the pre-dominance of social housing in the Black country stock. However, the proportion of social rented housing in the Black Country remains comparatively high with only Dudley comparing to the regional average of 21%, while surrounding districts (including Birmingham) have been experiencing much lower proportions of social housing stock.

### Table D.3.2. Tenure by Local Authority

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Owner Occupied (%)</th>
<th>Social Rented (%)</th>
<th>Private Rented (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dudley</td>
<td>71.4</td>
<td>21.8</td>
<td>6.8</td>
</tr>
<tr>
<td>Sandwell</td>
<td>60.3</td>
<td>30.3</td>
<td>9.3</td>
</tr>
<tr>
<td>Walsall</td>
<td>64.7</td>
<td>27.4</td>
<td>7.8</td>
</tr>
<tr>
<td>Wolverhampton</td>
<td>60.5</td>
<td>29.1</td>
<td>10.4</td>
</tr>
<tr>
<td>Telford &amp; Wrekin</td>
<td>68.8</td>
<td>22.0</td>
<td>9.2</td>
</tr>
<tr>
<td>Bridgnorth</td>
<td>71.4</td>
<td>13.4</td>
<td>15.3</td>
</tr>
<tr>
<td>Cannock Chase</td>
<td>73.7</td>
<td>19.3</td>
<td>7.0</td>
</tr>
<tr>
<td>Lichfield</td>
<td>79.3</td>
<td>13.5</td>
<td>7.2</td>
</tr>
<tr>
<td>South Staffs</td>
<td>60.4</td>
<td>27.7</td>
<td>11.8</td>
</tr>
<tr>
<td>Birmingham</td>
<td>83.4</td>
<td>10.6</td>
<td>6.1</td>
</tr>
<tr>
<td>Bromsgrove</td>
<td>83.4</td>
<td>10.6</td>
<td>6.1</td>
</tr>
<tr>
<td>Wyre Forest</td>
<td>76.1</td>
<td>14.8</td>
<td>9.0</td>
</tr>
<tr>
<td>W.Midlands</td>
<td>69.6</td>
<td>20.6</td>
<td>9.8</td>
</tr>
</tbody>
</table>


D3.17 The impact of two decades of sales of local authority stock has particularly thinned out the concentrations of social rented housing. Hence although a comparatively high level of social rented provision remains, it is now intermixed with former council rented stock which is now owner occupied or privately rented. Exercising the right to buy has for some purchasers not been matched by their ability to apply resources to maintain the quality of the homes involved.
D3.18 As well as Right to Buys, local authorities have been demolishing unsustainable housing. This has led to unmet demand for rented housing, with the result that local authorities are having to address a growing need for replacement of social rented housing. In addition, for those who do not qualify for social rented housing but cannot afford to purchase a property outright, choices are limited to the private rented sector or waiting for affordable housing such as shared ownership.

**Poor stock condition across all tenures**

D3.19 Housing standards are amongst the lowest in the UK, particularly in the private sector. In Sandwell, 74% of homes (public and private) do not achieve the decent homes standard. Some estates have also developed a reputation for anti-social behaviour, crime and disorder. With aspirations rising there is an increasing mis-match between the sort of housing and residential environments people are looking for and the availability of housing types in the Black Country. Unsurprisingly, in the most deprived areas, there is a growing problem of packets of low demand with concentrations of empty properties.

**Concentrations of Deprivation and Social Polarisation**

D3.20 There is a large concentration of deprivation in the Black Country as measured by the Index of Multiple Deprivation (IMD). The IMD (2004) covers seven domains of deprivation: income, employment, health and disability, education, skills and training, barriers to housing and services, living environment and crime. Table D3.3 demonstrates the scale of deprivation throughout the four Black Country authorities with 40% of Super Output Areas in the top 20% most deprived nationally and 17% in the worst 10%. The wide-spread nature of deprivation is particularly notable in the core of the Black Country. Figure D.3.1 illustrates the concentration of deprivation in the Black Country.

**Table D.3.3: Index of Deprivation 2004 Number of Super Output Areas (SOA) in the Black Country**

<table>
<thead>
<tr>
<th>Total SOA</th>
<th>Number in top 10% most deprived</th>
<th>Number in top 20% most deprived</th>
<th>Proportion of District SOAs in top 10% most deprived %</th>
<th>Proportion of District SOAs in top 20% most deprived %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dudley</td>
<td>202</td>
<td>12</td>
<td>40</td>
<td>6</td>
</tr>
<tr>
<td>Sandwell</td>
<td>187</td>
<td>44</td>
<td>100</td>
<td>24</td>
</tr>
<tr>
<td>Walsall</td>
<td>169</td>
<td>29</td>
<td>69</td>
<td>17</td>
</tr>
<tr>
<td>W'ton</td>
<td>158</td>
<td>34</td>
<td>75</td>
<td>22</td>
</tr>
<tr>
<td><strong>Black Country</strong></td>
<td><strong>716</strong></td>
<td><strong>119</strong></td>
<td><strong>284</strong></td>
<td><strong>17</strong></td>
</tr>
</tbody>
</table>

Source: ODPM
Lack of quality and breadth of choice

D3.21 At the other end of the spectrum, there is insufficient variety and choice of homes traditionally sought by higher income (A/B) groups in quality residential areas. Too many residential areas suffer from low quality environments and do not provide access to jobs, local amenities and first class education and health systems demanded by higher income groups. In the recent past, house prices have been failing to keep pace with the rest of the UK, discouraging the purchase of a home within the Black Country by mobile households.

Outward Migration

D3.22 Those people that decide to stay in the Black Country tend to move short distance but progressively outwards to the suburban fringe. This cascade effect has led to recent decentralisation, eroding the position of the urban core and its centres. This is an unsustainable trend, both because of the
damage this outward movement has on polarising communities in the inner core and the consequential pressure it places on the character of the environment in suburban areas through the consequential pressure for development arising from increased demand.

Housing Market Sub-Areas

D3.23 Consultants examining the functioning of the housing market in the Black Country and Telford have identified four broad categories of housing market sub-areas in the Black Country see Appendix 4, Map D4.8:

i) **Inner City Areas** – in Sandwell, Wolverhampton and Walsall – a highly complex and diverse mass of old towns and villages mixed with municipal estates with high levels of deprivation.

ii) **Extensive Municipal Areas** – largely in Wolverhampton and Walsall, peripheral to the older towns and facing issues of falling demand.

iii) **Freestanding Black Country towns** - in two concentrations in the North from Willenhall to West Bromwich and the South from Tipton to Lye. These areas are highly fragmented mixed-use industrial villages partially suburbanised with inter-war and post-war house building.

iv) **The Suburban Fringe** – largely in the west and north in Dudley and Wolverhampton and the eastern parts of Walsall (Aldridge and Streetly) containing the most affluent, qualified social groups living in predominantly detached housing.

Housing Market Weaknesses

D3.24 Consultants working on the Black Country and Telford Housing Market Study have concluded that the factors referred to above come together spatially to reveal a significant central area in the Black Country of relative housing market weakness that includes areas of low demand, low value and low quality properties. The first three of the housing market sub-areas all demonstrate this relative market weakness. They form a rough ‘X’ shape from North West Birmingham through Smethwick and West Bromwich to Wolverhampton and from Walsall to Brierley Hill and Lye in Dudley. This is the core of the Black Country, an area which is home to over 500,000 people – 50% of the Black Country population. This area represents a significant opportunity for housing market growth subject to comprehensive attention over the next 10 to 15 years to overcome local market weaknesses. In particular, within these zones there is a patchwork of neighbourhoods experiencing some of the country’s worst 10-20% deprivation scores and where the unpopularity of housing is most acute.
D3.25 The northern part of the Black Country, especially inner city Walsall and Wolverhampton faces the most immediate challenge. This is because it presents the worst environments, has greater population instability and social stress, is most vulnerable to decline, and market restructuring is less well advanced. Economically this area is more exposed to competition from the M54 corridor, but as the Economic Strategy has identified this presents real opportunities for economic change.

Housing Market Strengths and Opportunities

D3.26 For a number of years, and particularly since the RPG11 review began, the Black Country authorities have been actively pursuing an urban renaissance agenda – taking all available opportunities to make the Black Country a more attractive place to live, whilst maximising use of available brownfield land. Comprehensive plans for the Black Country’s key centres have been adopted, helping to create an upsurge in sustainable, high density residential development therein sustained by complementary uses. In the light of Government advice and in the context of a declining manufacturing base, the Black Country authorities have comprehensively trawled their land banks and reallocated large areas of poor quality, under sized employment land for housing, creating new, high quality residential neighbourhoods.

D3.27 Housing renewal has also been actively pursued, involving the clearance of many unpopular, unsustainable Council housing estates and their replacement with sustainable, mixed tenure communities, as well as stock improvements. Right to buy has also been successful in breaking up monolithic areas of single tenure housing and generating investment in the better quality stock.

D3.28 Impressive levels of brownfield development, increasingly high densities and improved design have been achieved as a result of step changes in planning policy which have been crystallised in the four new UDP’s. These improvements are continuing, with a number of major sites in the pipeline allowing the four authorities to meet and in some cases exceed their RSS targets up to 2011. Improvements have been accelerated by the significant amounts of external funding brought into the area and the increasing interest of private investors and the house-building industry. Indeed there has been an increasing confidence in the Black Country housing market in recent years: house prices are catching up with the rest of the region, even in previously unpopular areas, and the latest population estimates show that population loss is being stemmed and the sub-region will soon experience net in-migration.

D3.29 In pursuing the Region’s Urban Renaissance agenda, the four Black Country authorities have been actively pursuing new residential development. The recent upturn in the housing market and the increases in land values have made the development of brownfield land more viable across the Black Country. The Black Country authorities have a strong commitment to developing brownfield land, with between 94% and 99% of new dwellings being constructed on brownfield land during 2004/2005 with even higher percentages having occurred in previous years. During 2004/2005 22 ha of
employment land was committed to residential development across the Black Country.

D3.30 Net housing completions have been rising steadily since the late 1990s/early 2000s, after being tempered by a large number of demolitions across all four boroughs. The number of demolitions is now decreasing and the vacant sites are being redeveloped with well-designed, new private and affordable housing. The Black Country’s commitment to the provision of affordable housing is also evident through the adoption and implementation of supplementary planning guidance supported by better housing needs information.

D3.31 The density of new developments has also increased substantially over the last 2-3 years. In Dudley, during 2004/05, the majority of dwellings were constructed at densities of between 30-50 dph. However, in Sandwell, Walsall and Wolverhampton, the majority of dwellings have been constructed at densities greater than 50 dph. Sandwell in particular have higher density developments, with 66% of new dwellings in 2004/05 being constructed greater than 50 dph. It is anticipated that this current trend will continue over the next few years.

THE SCALE OF THE CHALLENGE AND THE OPPORTUNITY

D3.32 Taking together the challenge of the housing targets set out in the Regional Spatial Strategy with the consultants analysis of the operation of the housing market in the Black Country, four key housing challenges have been identified to achieve the aspirations of the Black Country Vision to 2031. These challenges also provide the opportunities for delivering the urban renaissance of the Black Country. They are:

<table>
<thead>
<tr>
<th>Four Key Housing Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Maximising the use of brownfield land to accommodate housing growth in a sustainable manner.</td>
</tr>
<tr>
<td>2) Determining an appropriate future for major interwar and postwar Council housing estates.</td>
</tr>
<tr>
<td>3) Capturing the economic opportunities of BME communities through accommodating their needs and aspirations so as to eliminate social polarisation.</td>
</tr>
<tr>
<td>4) Retaining and attracting increasing numbers of higher income earning households (social class A/B).</td>
</tr>
</tbody>
</table>
D3.33 Cutting across these four specific challenges, the Black Country will have to respond to three underlying issues which have a particular interplay with the provision of housing:

**Three Cross Cutting Housing Issues**

1) **Promoting social cohesion** across all the diverse Black Country communities and addressing specific issues of emerging social polarisation in individual communities.

2) **Addressing social and economic exclusion.** This means a more co-ordinated and longer term approach focused on main programmes to tackle issues of deprivation in communities throughout the core of the Black Country which have been the subject of a myriad of individual special programmes in the past.

3) More specifically, understanding the role of the private rental market and integrating it as a positive force in the housing market and the development of neighbourhoods in which people choose to live.

**Housing Challenge 1: Accommodating Housing Growth – a Brownfield Land Strategy**

D3.34 In the last 15 years, house building has fallen behind household formation for the first time since World War II; unsurprisingly, population fell by 20,000 in this period. If current demographic trends continue, by 2031 the population of the Black Country will fall by a further 84,000. To reverse this trend, the sub-region needs to accelerate the rate of house building – the signs are that this is now happening. More importantly, sustainable communities must be created which provide access to employment, public transport, public amenities and first class education and health services. Above all, the Housing Study has reinforced the need to improve the quality of the physical environment in the Black Country.

D3.35 The Black Country Study sets out to determine what level of housing growth was appropriate to secure sustainable urban renaissance in the Black Country and to demonstrate how to accommodate that growth. In terms of the scale of growth, as a minimum the RSS targets for house building must be delivered. This means building between 2,500 new homes per annum to 2011 and 3,600 new homes per annum thereafter, allowing for demolition rates of 800 dwellings per annum. These figures were set to secure urban renaissance in the Black Country so that the sub-region would accommodate the growth needs of its own population. The Demographic Study undertaken through the Black Country Study has demonstrated that achieving these targets should increase population by approximately 60,000 (44,000 households) to 2021. Significantly, achievement of these house building targets would mean that the Black Country was no longer an area of net outward migration that it has been in the recent past but will become
an area of net inward migration from 2011 onwards at an average rate of 1,600 persons per annum. The signs are that house building rates have been picking up in recent years, led by private sector investment, and that the trends of population decline in the Black Country have been halted. However, the tendency of the Black Country to lose households through the net balance of outward migration exceeding inward migration remains a challenge.

D3.36 Beyond 2021, to accelerate the growth of the Black Country in accordance with the Black Country Vision, the target is a further 5% growth to 2031. This scenario has been tested through Economic, Transport, and Housing and Employment Land Capacity Studies. The Demographic Study also examined a range of scenarios beyond 2021, ranging from nil net in-migration post 2021 to a growth of +15% to 2031. The house building implications of each of these was tested through the Housing Capacity Study. When examined alongside the Employment Land Study, the Housing Capacity Study demonstrates that achieving RSS targets to 2021 and pursuing a growth strategy of +5% up to 2031 is achievable and compatible with the principles of sustainable development. In house building terms, this implies the continuation of the 2011-2021 RSS house building rates of 3,600 per annum over the 2021-31 period and a continuation of the same rate of 800 demolitions per annum, with a one to one replacement rate.

D3.37 Housing and Employment Capacity Studies have demonstrated that the challenge of achieving RSS housing targets to 2021 and their continuation beyond to 2031 can be achieved through pursuing a 100% brownfield land strategy. However, this will require major land use restructuring in the Black Country with 75% of new dwellings being constructed in residential led mixed use areas on some 1,700 ha of existing employment land. In addition, city and town centre living, which is beginning to emerge in Wolverhampton, Walsall and Brierley Hill, could accommodate a further 10% of need.

Housing Challenge 2: The Future of Former Council Housing Estates

D3.38 In 1981 the dwelling stock of the Black Country was dominated by Council dwellings. Right to buy and the clearance of unpopular high rise flats to be replaced by private sector new build has eroded that dominance but has still left significant pockets of social housing in the poorer and more stigmatised estates in parts of the Black Country (see Figure D.3.2).
Figure D3.2 Household Tenure,
### D3.39
These pockets exhibit similar characteristics of households with low incomes and low house prices, stigma of poor environment and high crime, few 1 or 2 bedroom and with dwellings but high proportions of older and of younger age groups – they are increasingly becoming under-occupied with increasingly marginal and declining services. Clearance, particularly in Sandwell, of the most unpopular high rise buildings has helped stem deterioration, but people who invested in these areas through right to buy have been trapped by the relative house price decline of these areas while social rent tenants are increasingly looking towards the private rent sector in other locations, especially those near town centres.

Without intervention, further deterioration of these estates will occur with increasing voids, widening price differentials, declining local services, increasingly transient population and rising crime and vandalism.

### Housing Challenge 3: Countering Social Polarisation & Meeting the Needs and Aspirations of the variety of BME Communities

### D3.40
The BME community represents a significant source of population and household growth in the Black Country and the Conurbation both through natural internal growth but also through migration. There are currently concentrations of BME communities in the Black Country particularly in the northern parts of the Black Country and adjacent to Birmingham. There is evidence that there has been a progressive move to suburban locations of
members of some BME communities (though retaining cultural ties with traditional inner city areas), while other BME communities remain concentrated in traditional inner city areas of older terrace housing. (*Figures D.3.3 and D.3.4*)

D3.41 Under current market conditions polarisation of poorer BME communities is set to continue. Birth rates and larger household sizes will mean increased overcrowding while these communities remain in the current housing stock. Access to other housing is restricted by affordability and increased competition from BME communities forced out of their ‘traditional’ residential areas elsewhere in the conurbation by high prices induced by competition. The condition of the housing stock occupied by these groups will deteriorate as repairs and improvements become less affordable. There may be increased movement into areas of cheaper terraced housing elsewhere in the Black Country, notably in parts of Dudley Borough, where these groups currently only have a small representation. Consultants advise that unless the housing needs of these communities are addressed then there will continue to be increasing geographical polarisation of the poorest of the BME communities and increased scope for the breakdown of social cohesion between communities.

**Housing Challenge 4: Retaining and Attracting A/B Households**

D3.42 The housing challenge facing the Black Country also requires a radical reversal of the demographic and social trends that have become ingrained over the last 30 years. In particular, there is a need to provide housing and residential areas which will retain and attract 50,000 additional households of higher skilled, higher income (A/B) groups to bring the Black Country socio-economic mix in line with the current national average of 22%
(Census 2001) by 2031. Peoples’ perceptions of particular neighbourhoods and communities must be given confidence such that even if they move, there is a desire to stay locally providing the appropriate housing choice is available.

D3.43 The Black Country competes as a place of residence for A/B households with a large swathe of middle income housing in Birmingham and attractive towns in more rural areas to the north and west, from Bromsgrove to Lichfield. The strongest provision of housing attractive to A/B households is on the periphery of the Black Country (see Map D3.1). These areas also show greatest out movement of A/B households – for example the recent dramatic expansion in A/B households in Telford has included outward movements from Tettenhall and Penn neighbourhoods in Wolverhampton to top end family housing in Priorslee in Telford. Competition from Sutton Coldfield and Perry Barr has restricted the provision of housing for higher income groups in Walsall, though the Bearwood area of Sandwell has benefited from its proximity to Birmingham city centre to attract professional households. Growth in A/B households of 63% in Telford between 1991 and 2001 contrasts sharply with the 10–12% growth exhibited in Black Country districts.

D3.44 This is one of the major challenges of the whole Black Country Vision as it drives key interdependencies in terms of attracting and retaining knowledge led business and sustaining growth in retail and leisure provision in our centres from which all communities will benefit. One positive trend identified by the housing market consultants has been the recent growth in new build dwellings in the Black Country, 50% of which has been purchased by households in social class A/B. The Indian community is particularly active in the new build market, representing over 25% of purchasers. To achieve the Black Country Vision though we will need to ensure that the right environment and services are provided to retain those households and to increase the proportion of new build property attractive to A/B households to 70%, with a mix which includes upper end family housing that has proved attractive to Black Country residents moving to Telford. However, whilst seeking to expand opportunity for those within, or who aspire to, A/B status, the overall strategy is founded on promoting social inclusion for all in recognition of the varying needs of all sections of the Black Country community.

D3.45 A recent survey of new house purchasers in the Black Country and its surrounding districts, undertaken as part of the Black Country and Telford Housing Market Study (Ecotec, 2006), has confirmed the key measures needed to retain future A/B households. The top five are:

1. Tackling crime and anti-social behaviour.
2. Build, bigger, better, more luxurious housing.
3. Improve appearance of the area.
4. Improve local schools.
5. Improve the availability of jobs.

Of those recent house movers 64% of those moving to/within the Black Country state that they expect to remain in the Black Country in ten years time. Very few movers in the neighbouring districts though envisage a future move into the Black Country in the next ten years.

**MAKING IT HAPPEN: GROWTH AND RENEWAL**

D3.46 By meeting RSS targets over the next 25 years, the number of households in the Black Country will significantly increase. First, there is a need to ensure new homes are built in high quality, safe urban environments which provide access to employment, public transport, education and health services. Only by doing so will the area attract and retain ‘knowledge workers’ required to deliver the Economic Strategy. Second, the area must reverse decline in existing housing areas and improve the quality of life of residents. Housing strategy will therefore provide for both housing growth and housing market renewal and respond to each of the four challenges set out in Paragraph D3.32.

1) The Strategy for Housing Growth - building new sustainable communities

D3.47 To achieve the scale of housing growth planned up to 2021 and continue these rates up to 2031, the Housing Capacity Study indicates the requirement to transfer 1,700 ha of old industrial land for housing use with a focus on Centres and public transport Corridors. This is the cornerstone of the strategy to accommodate housing growth, the achievement of which is essential to meet targets without impinging on greenfield land at the urban fringe, and urban green spaces.

D3.48 Proposed changes to the RSS in the form of specific Black Country Urban Renaissance policy (UR1A) encourages local authorities to plan for residential growth in Centres and to define growth corridors and appropriate sites for development in growth corridors through the Black Country Joint Core Strategy and LDDs. This process will include identification of locations within the Black Country which provide the best potential for creating new high quality residential environments. Through the Black Country Study Delivery Plan the Consortium will promote environmental change in these localities as the driver for the achievement of the housing quality and mix to meet both socio-economic balance aspirations and the needs of our different communities. Areas with the greatest potential for developing the necessary mix of quality residential environments include:

- **The four strategic centres** - promoting ‘city living’ and countering the trends of decentralisation. Higher densities will be required, and communities on the fringe of centres will require strong public transport links.

- Adjacent to existing and new **public transport interchanges and corridors** - providing access to employment, education,
health and leisure facilities – the primary means of providing for sustainable housing growth in the Black Country;

- **Extending the qualities of suburban localities into adjacent areas** and around **smaller centres** - where there may be opportunities for some limited urban remodelling to provide a range of accommodation sizes, types and levels of affordability;

- **Canalside** locations – in other parts of the country, canalside living is proving highly attractive to the market – the Black Country has 177km of canals which often overlap with public transport corridors; and

- Areas adjacent to **new parkland opportunities** to be created in appropriate former industrial areas.

D3.49 To enable people to exercise greater choice, there is a need to provide through our delivery arrangements a greater mix of dwelling types and residential densities than currently exist. Only dwellings that fit with modern lifestyles and aspirations will prove attractive to those with choice. A key proposal of the Black Country Strategy is the preparation of a Black Country Landscape Plan to lead the process of environmental change necessary to the creation of new housing environments (see Chapter D4).

D3.50 Delivery arrangements will be designed to bring together investment in housing, transport, education and employment within targeted Centres and Corridors to create a critical mass of transformational change. Additionally, the Consortium will seek to co-ordinate the work of the Black Country School Improvement Partnership to align education with change in housing growth areas and in areas of housing renewal investment.

2) **Renewing the housing market in former Council estate areas most at risk**

D3.51 The relatively unattractive quality of the existing housing stock and dwelling mix of these estates and their underlying poor environmental quality means that policies of revising the stock profile and attractiveness of these monolithic estates through progressive remodelling should be actively pursued to provide a greater range of densities and housing types attractive to the market, including a wider social mix and particular needs of BME communities.

D3.52 This means adopting a comprehensive and phased approach to the redevelopment of such estates, evidencing how local people have been consulted on options. A comprehensive approach to remodelling and demolition (where necessary) will require the assembly of larger sites, however, given reducing voids and the number of Right to Buys, this will take longer than in the past where such estates were fully Council owned. Such an approach will enable the market to take the opportunity for remodelling to proactively meet needs and aspirations and provide greater choice.
D3.53 The housing market restructuring proposals complement estate remodelling with measures to identify those communities most at risk of deprivation and social polarisation and to work with those communities to develop multi-agency co-ordinated programmes of action (combining main programme and targeted renewal programme resources) to alleviate poverty, raise educational achievement and skills, maximise opportunities to enhance quality of life and tackle housing stress.

3) Responding to the various housing needs of BME communities

D3.54 The third component of the Black Country’s housing proposals is a pro-active approach to meeting the needs of the variety of BME communities. This means working with those communities to ensure that their particular needs and aspirations are reflected in the variety of new housing design; facilitating their move into new environments on remodelled estates; and improving their housing and living conditions through progressive renewal of older inner core housing areas.

D3.55 Adoption of policies of progressive renewal of inner core areas suggests adopting more comprehensive renewal programmes than the piecemeal approach of the recent past. The proximity of these areas to older industrial estates with potential for restructuring for residential led mixed use (the core of the housing growth strategy) will allow for management of the release of former employment land, to ease housing supply constraints on BME communities in these areas, improve affordability by growing housing supply and providing the room for progressive renewal while maintaining community cohesion.

4) Retaining and attracting more higher skilled and higher income households

D3.56 A fourfold strategy is proposed to ensure that the Black Country has a better socio-economic balance in future with increased proportions of higher income households. Measuring the proportion of social class A/Bs is a useful proxy for this as it also identifies the managers, professionals and associate professionals/technicians required to drive the achievement of the ‘knowledge economy’ in the Black Country, integral to our economic strategy. The four components of the strategy are:

1) Enhancing the environment and services in our existing residential areas attractive to higher income households to encourage them to remain in the Black Country – largely the suburban fringe of the Black Country.

2) Extending the perception and attractiveness of quality residential environments into adjacent housing areas and areas of older employment land for transformation into housing growth areas. This means growing new residential character areas in from the periphery of the Black Country.
3) **Creating new high quality residential environments in the core of the Black Country** where the environment requires complete transformation, largely from former employment land but also through selective remodelling of estates.

4) Providing **opportunities for 'City Living' in the four strategic centres** – this has proved popular to certain types of A/B households elsewhere in the United Kingdom.

D3.57 In terms of scale, the main focus of this strategy will need to be on the creation of totally new environments, as the existing provision of quality residential areas of sufficient attractiveness to A/Bs is limited in the Black Country. Historically few Edwardian suburbs, which have proved popular to the market for such households in other urban areas, exist in the Black Country. This means that proposals set out in Chapter D5 for the adoption of a Landscape Investment Plan to lead out the transformation of the Black Country environment, will be critical to the success of this strategy.

D3.58 To implement this strategy it is intended to identify existing residential character areas for which the Black Country authorities will:

- Consider plans and policies to guide the future development of those areas in sympathy with the characteristics which make them attractive and special (working with the Urban Park principles set out in Chapter D5).

- As with all areas, ensure that the schools, safety, facilities and services within these areas are maintained to the highest standards.

- Grow out from these residential character areas to create more extensive environments of sufficient quality and attractiveness to attract and retain A/B households.

The proposed RSS draft Phase One Revision Black Country Urban Renaissance policy is designed to facilitate and support this process, encouraging local authorities to give careful consideration through their LDFs to issues of density, urban design and the fabric and character of existing residential areas.

**Housing Market Relationship with Telford and Environs**

D3.59 In the 1960’s and 1970’s growth of Telford as a new town was linked to migration of people from the Black Country as part of planned accommodation of Black Country and conurbation household growth and improvements in housing conditions through slum clearance. The joint Black Country and Telford Housing Market Study (Ecotec, 2006) has identified that migration into Telford is now dominated by moves from the rest of England and Wales with less than 20% coming from the West Midlands conurbation (c 10% from the Black Country).
D3.60 However, there remains considerable synergy between the operation of the housing market in Telford and that in the Black Country in terms of aspirations. Recent housing development in Telford has provided primarily for A/B households at the expense of the provision of affordable accommodation to meet the internal demographic pressures of Telford itself, particularly those more disadvantaged households living in South Telford. The desire of Telford and Wrekin Council to achieve a better balance of new house building in Telford, including a higher proportion of affordable housing to meet the needs of its own population complements the aspirations of the Black Country to attract mobile A/B households.

D3.61 This is an example of the type of joint working which the Black Country will need to establish with authorities in its adjacent areas to promote shared interests with delivery agencies and the market – in this case firstly reducing levels of new upper market housing in Telford at the expense of affordable housing for local residents. Secondly, by the provision of more upper market housing environments in the Black Country, and thirdly reduced upper market housing activity in Telford to encourage investment in the Black Country to attract mobile A/B households.

D3.62 Similar partnerships, working with the market and delivery agencies, should also be explored with other adjacent authorities in the Environs to promote quality housing investment in the Black Country aimed directly at reducing pressure for housing development in areas on the periphery of the Black Country which is eroding their greenfield environment. This would contribute to the delivery of the Regional Spatial Strategy.

**PRIORITY FOR ACTION**

D3.63 Spatial priorities for action to secure housing growth and improve the functioning of the Black Country housing market for communities are:

- To secure residential growth in the four strategic centres, to promote urban living;
- To provide for the majority of our housing growth along a range of public transport corridors, where new residential communities will be created;
- To focus on limited number of housing market intervention areas over the next ten years, where progressive remodelling will improve housing conditions and opportunities for existing communities and create opportunities for new residential environments to emerge in association with growth in corridors;
- Identify residential character areas for enhancement and extension into housing growth corridors.

D3.64 Transformation of the environment in all of these areas is a pre-requisite to the achievement of successful growth and market functioning. It is
proposed to achieve this through prioritising the preparation of, and investment in, a Black Country Landscape Plan to drive change.

**Promoting urban living in centres**

D3.65 Housing Strategy reinforces the importance of the Black Country strategic town centres. A significant and indicative proportion (8,000) of new dwellings will be provided within the four centres. In doing so, more opportunities will be created for high quality urban living where people are better connected to employment, local services, leisure and retail.

**New sustainable communities along public transport corridors**

D3.66 Housing growth will be focused on public transport corridors connecting the strategic centres together and with Birmingham and in areas of opportunity for employment land restructuring and residential remodelling. Within these corridors there will be plans for concentrations of development within walking/cycling distance of railway stations, Metro stops and existing local centres to promote sustainable living. These are areas where opportunities for quality higher density developments should be sought. The clear aim is to link more people to the employment, leisure and retail opportunities provided by the strategic centres. Through the work of the land capacity studies, corridors have been identified for potential development. These will be tested for the viability of high volume public transport provision, through the West Midlands Conurbation PRISM model *(see Map D3.1)*.

The corridors fall into three categories of public transport provision:

1) **Existing passenger rail lines**: potentially:
   - Wolverhampton to Birmingham via Dudley Port and Smethwick.
   - Stourbridge to Birmingham via Rowley Regis and Cradley.
   - Walsall to Birmingham via Tamebridge.
   - Walsall to Cannock via Bloxwich.

2) **Existing and planned metro lines**: potentially:
   - Wolverhampton to Birmingham via Bilston, Wednesbury, West Bromwich and Smethwick.
   - Wednesbury to Brierley Hill via Dudley Port & Dudley town Centre
   - Wolverhampton to Walsall via Wednesfield and Willenhall.
   - Walsall to Wednesbury via Darlaston.
3) **Other Opportunity Corridors** arising from potential restructuring of poor quality employment land identified through the Employment Land Capacity Study (the feasibility and potential form of a high volume public transport mode will be considered as part of the assessment of the viability of such Corridors as Housing Growth Corridors through the development plan process). Potential other Corridors include:

- Wolverhampton Centre to Bushbury.
- Walsall Centre to Brownhills.
- Brierley Hill Centre to Stourbridge.
- Kingswinford to Dudley town centre via Gornalwood (excluding Pensnett Trading Estate).
D3.67 The extent of these indicative Housing Growth Corridors will be defined through the ongoing statutory planning process in Core Strategy and Local Development Documents. Robust landscape, land use planning, transport and design frameworks (implementation masterplans) will be prepared to guide investment decisions for each of these areas. Based on the Black Country capacity studies and the consultants’ strategic advice the Consortium will aim to accommodate by 2031 growth of some 54,000 dwellings in these Corridors to 2031 (30,000 to 2021).

D3.68 **Table D.3.4 below sets out the potential housing capacity in Centres and Corridors.** These indicative figures, while providing the initial strategic framework for the planning of the Centres and Corridors are subject to further joint planning agreement between the four Black Country LPAs as part of the Core Strategy and LDF preparation process. A number of the potential Housing Growth Corridors coincide in all or part with the proposed Employment Land Investment Corridors. This will provide for the opportunity to create new forms of mixed use environment of the very highest quality combining the best in urban living with the location of knowledge based companies set in a quality parkland setting.

**Table D.3.4 Accommodating Housing Growth: Centres & Public Transport Corridors**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Housing Growth Area</th>
<th>Potential Dwelling Capacity *1 to 2021</th>
<th>Potential Dwelling Capacity *1 2021 – 2031</th>
<th>Potential Dwelling Capacity *1 TOTAL 2001 - 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Black Country Centres:</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>W. Wolverhampton City Centre</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Ws. Walsall Town Centre</td>
<td></td>
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<tr>
<td></td>
<td>WB. West Bromwich Town Centre</td>
<td></td>
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<tr>
<td></td>
<td>BH. Brierley Hill/Merry Hill Centre</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Indicative Capacity - Centres</strong></td>
<td>5,500</td>
<td>2,200</td>
<td>7,700</td>
</tr>
<tr>
<td></td>
<td><strong>Black Country Corridors:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A Railway Lines (Existing) Corridors Nodes around stations-indicative capacity</td>
<td>12,900</td>
<td>12,000</td>
<td>24,900</td>
</tr>
<tr>
<td></td>
<td>B Metro Lines (Existing and Planned) Corridors: Nodes around metro stops-indicative capacity:</td>
<td>9,100</td>
<td>7,500</td>
<td>16,600</td>
</tr>
<tr>
<td></td>
<td>C Other Potential Growths Corridors (to be tested): Indicative Capacity</td>
<td>8,000</td>
<td>4,400</td>
<td>12,400</td>
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<tr>
<td></td>
<td><strong>Total Potential capacity in Corridors:</strong></td>
<td>30,100</td>
<td>23,800</td>
<td>53,900</td>
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<tr>
<td></td>
<td><strong>Total Potential Capacity in proposed Housing Market Renewal Key Intervention Areas:</strong></td>
<td>Nil Net</td>
<td>Nil Net</td>
<td>Nil Net</td>
</tr>
<tr>
<td></td>
<td><strong>Other Sources incl commitments</strong></td>
<td>8,500</td>
<td>1,600</td>
<td>10,100</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL BLACK COUNTRY HOUSING CAPACITY</strong></td>
<td>44,100</td>
<td>27,600</td>
<td>71,700</td>
</tr>
</tbody>
</table>
*1  Indicative capacity is subject to confirmation through LDF process to identify specific sites.

*2 Other Sources = commitments outside Corridors, intensification in existing residential areas, flat conversions as set out in Black Country Housing Capacity Study

Figures based on Black Country Housing Capacity Study and mapping by GVA of PRISM ‘Preferred Strategy’ data input.

D3.69 The Black Country Delivery Plan will consider initial corridors for priority action which can be progressed within the existing statutory planning framework (current adopted UDPs). These Corridors will be identified where there is a combination of existing market interest in developing housing on former employment land, provision of existing quality public transport, connectivity to existing A/B residential areas and A/B employment provision and scope for early implementation of environmental change (such as a canal corridor) that would send a major signal to the market that Black Country renewal is to be based on creation of a new image of environmental quality.

D3.70 In addition to the early completion of the priority corridor plans, early implementation will be sought for the existing proposals for a 1,000 new homes in a mixed use development at Bilston Urban Village, as an exemplar of the creation of new residential environments from a former steelworks located on an existing Metro line corridor.

D3.71 It is proposed to investigate the potential for a public/private venture Demonstration Project with developers, regional agencies and a national advocacy body for quality housing design for the culturally and community sensitive renewal of a priority location within the Black Country. The aim would be to create a residential led mixed use environment attractive to a range of ethnic and socio-economic groups. The Housing Market Study has identified that inner areas of Walsall and Wolverhampton are facing the greatest immediate challenge and are therefore appropriate locations for consideration of such a scheme.

**Housing market intervention areas**

D3.72 There is an extensive area of the Black Country highlighted by the Black Country and Telford Housing Market Study with potential characteristics of housing market weakness (Ecotec, 2006). This area will be the focus of renewal programmes aimed at alleviating deprivation and raising the quality of life of residents and their ability to contribute to, and benefit from, the knowledge economy in the Black Country. This area largely coincides with the existing Regeneration Zones in the Black Country which are the focus for the application of Regional Development Agency funds to connect community needs to economic opportunities. These Zones are being brought together under a single management framework within the Black Country Consortium management arrangements. Their operation and extent should be reviewed as part of the forthcoming RES Review to take account
of the evidence presented by the Housing Market Study and the overall Black Country Strategy.

D3.73 Within this area neighbourhoods will be identified for more intensive market renewal intervention. Indicative areas from the Housing Market Study are illustrated in Map D3.1.

D3.74 Consideration will be given in these areas to pursuing progressive remodelling in a manner that is sensitive to community needs and aspirations. They will include both older poor quality areas with communities living under housing stress and former Council estates displaying increasing low demand and stigmatisation. Each will require tailored forms of intervention, including Masterplanning. There is considerable potential synergy between the Corridors as foci for housing growth (through restructuring of employment land) and with the Corridors for Employment Land Investment. Masterplanning and the phasing of intervention and community engagement will therefore be integrated as a unified exercise with the planning of the Housing and Employment Corridors, including the proposed Landscape Plan.

Enhancing and Creating Residential Character Areas

D3.75 The Black Country and Telford Housing Market Study (Ecotec, 2006) has identified the areas that are currently attractive to A/B households. They are largely on the periphery of the Black Country as set out in Map D3.1. Working with the communities in these areas will identify what makes them special, including using the Characterisation Model which Wolverhampton City Council have been piloting with English Heritage. The principles of the Urban Park (set out in Chapter D4) policies and plans are proposed to guide future development so as to preserve and enhance the best of these areas at the same time as taking account of the housing needs of those communities including the provision of smaller, affordable dwelling units for young and older households. The Housing Capacity Study has identified ways in which planning policy may be adapted to support this.

Overall Strategy

D3.76 The Strategy will be implemented through a combination of planning and housing initiatives, and including Local Development Frameworks, Regional and Local Housing Strategies and the RHB Allocation Strategy.
D4 TRANSFORMING THE ENVIRONMENT: BLACK COUNTRY AS URBAN PARK

THE BLACK COUNTRY ENVIRONMENT TODAY

D4.1 The perception of the Black Country is one of a poor quality natural and built environment, characterised by large amounts of old, unattractive and disused industrial land. ‘Infilling’ of land between our towns, described in the Housing Chapter D3, means that the landscape can appear to be very built-up.

D4.2 In contrast, when viewed from the air, far from being dominated by ‘urban’ areas, there is a view of green landscape and open spaces. These open spaces are critical to the environment, for good health and to local people for a huge range of functions including not only amenity, recreation, sports and overall quality of life, but also help foster a sense of place providing opportunities for walking and cycling as a mode of transport; and contributing to the management of the overall environment through control of air quality and water pollution and flood zones; and the conservation of biodiversity, wildlife corridors and the historic environment. This is the vital functional green infrastructure that needs to be safeguarded and enhanced to continue to deliver this wide range of key benefits and contribute to "quality of the environment".

D4.3 Many people are unaware of the sub-region’s environmental assets – natural, built and historic. Its topography is characterised by hills and valleys incorporating the watershed between the Trent and Severn river catchment systems (213 kms of rivers and streams). Relative to its size, the Black Country has some of the most diverse geology in the world, shaping its landscape and pattern of settlement, as its mineral wealth drove the first phase of industrialisation. Its geology is of significant international interest. Prior to the urbanisation of the area, the earlier historic landscapes of the Black Country included wetlands, heathlands, woodlands and rolling agricultural valleys. Surviving relics of these earlier natural landscapes, together with post industrial landscape, support a range of wildlife sites and corridors. Wrens Nest, in the heart of the Black Country, was the first urban National Nature Reserve to be designated – it will be celebrating its 50th birthday this year (2006).

D4.4 Significant remnants of the Black Country’s industrial heritage also still remain. The most obvious is the extensive canal network (177 kms, 63 locks and 3 tunnels) – the original ‘motorways’ of England that connected industry together across the country. Others, such as Avery Building in Smethwick (the first bespoke factory building incorporating the Soho Foundry of Boulton and Watt, the first manufactory of Steam engines), are of great significance and represent ‘hidden gems’.

D4.5 The environment is of course also characterised by our towns and district centres with their strong association to local communities and each with its own distinctive identity which gives the Black Country such a unique character. These historic settlements continue to evolve, and recent iconic
buildings such as Walsall Art Gallery are now symbols of Black Country regeneration.

D4.6 ‘Broadening Horizons – A Vision of The Black Country Urban Park’ (Lovejoy, 2004) argued that failure to realise the potential of the Black Country’s natural, built and historic assets is a major reason why some negative perceptions prevail. Many are hidden or inaccessible and neglected and therefore go unnoticed and unused.

D4.7 Even taking full account of our assets, there are still specific environmental problems in the Black Country to deal with. The long and complex nature of industrialisation means that much land has been recycled and is therefore at greater risk of contamination above and below ground. Air Quality Management Areas (AQMA’s) have been identified where air pollution standards (NO2) are exceeded, primarily due to road traffic emissions. Moreover, rates of recycling and composting household waste from the Black Country are lower (15%) than the national average (23%) (2004/05).

D4.8 Both residential and employment settlements have crept over hills and into valleys resulting in further loss of the Black Country’s distinctive topography. The landscape continues to be dominated by ‘tunnels’ of development along roads rather than a sense of vistas and of distinctive places.

THE SCALE OF THE CHALLENGE

D4.9 The need for radical improvement of the environment has been identified as critical to urban renaissance of the Black Country vision. This conclusion was reached in both the Black Country Economic and Housing streams of work. According to GHK (2005), the creation of new environments will be crucial for attracting investment from high value-added firms. Therefore, there is a need to transform the environment in the proposed Black Country Employment Land Investment Corridors and Employment Land Opportunity Areas. The Sustainability Appraisal supported the environmental emphasis in the Study and RSS Revision policies.

D4.10 Similarly, a high quality healthy environment is a priority for ‘knowledge’ workers, when choosing where to work or bring up a family. The Housing Study notes this as a major reason why such groups are currently leaving the area. Thus, high quality healthy environments must underpin the creation of new residential Corridors and housing market renewal.

D4.11 As well as the economic benefits, there is a need to improve the quality of the environment as an objective in its own right as part of the drive to improve standards of health and well-being amongst local people and to help deliver wider sustainability targets. Therefore a high quality healthy environment is needed to:
- Promote healthy living with decent air and water quality;
- Offer secure, trouble-free living;
- Provide sufficient, accessible, high quality open space for people’s physical, mental, social and spiritual needs and to support biodiversity;
- Support alternative modes of transport, e.g. walking and cycling;
- Meet cultural needs – leisure, sports, arts, recreation, heritage etc;
- Strengthen and foster local distinctiveness, sense of place and civic pride;

D4.12 Home to over a million people and 500,000 jobs, the Black Country is an area of sufficient size to make a significant contribution to the regional and national Government targets to improve the environment. For example, by setting new standards for building design and taking account the magnitude of new development required to meet needs, a major contribution to achieving lower carbon emissions can be made.

D4.13 The 30-year Vision for the Black Country requires substantial development and land use change and enhancement in the region of 3,000 ha. This must be integrated with policies to protect, enhance and manage our environmental assets, including full appraisals of sustainability. There is the opportunity to become an exemplar for environmentally sound development (where low carbon emissions, recycling and waste recovery, renewable energy, sustainable drainage, greenspace, heritage-based regeneration etc are the norm) so that we help to ameliorate climate change, not add to it.

D4.14 In short, failure to improve the quality of the environment will prejudice the local economy, local people will be faced with poorer standards of living, poorer health, there will be further outward migration, and the opportunity to make a contribution to combat global climate change will be missed.

MAKING IT HAPPEN: ‘BLACK COUNTRY AS URBAN PARK’ AND LANDSCAPE PLAN

D4.15 In order to transform the environment, it is proposed that the whole of the Black Country be known as an ‘Urban Park’ - a national exemplar for urban living and sustainable urban renaissance. The transformation of the environment will require a Landscape Plan to define the urban form of the Black Country.

Principles of Black Country as Urban Park

D4.16 Essentially, ‘Black Country as Urban Park’ will create a framework for rediscovering the sub-region’s distinctive settlement form, integrating natural and urban environments and helping to realise the potential of the area’s natural, built and historic assets. This radical new strategy for the environment will:
• Highlight the topography and natural landscapes;

• Link existing communities to their traditional centres and new residential areas;

• Emphasise physical and symbolic connections;

• Provide linked visual, historic and cultural identification; and deliver a ‘Living Landscape’ including large areas for wildlife and geological heritage (seeking UNESCO endorsed European Geopark status for the Black Country);

Use ‘improving public health’ as a focus for environmental transformation;

D4.17 What will Black Country as Urban Park look like? ‘Broadening Horizons’ suggests the Black Country’s distinctive topography should provide the foundation. From this, the urban park will follow three key design layers:

### Black Country as Urban Park: Three Design Layers

**Beacons:** highlighting some of the most distinctive characteristics of the Black Country to residents and visitors. These could take a variety of forms, including sculptures on hills, heritage/community features, raising awareness by interpretation or flagship events.

**Corridors:** joining up the Black Country by utilising its environmental assets. Canals, waterways and green spaces will provide a framework for new environments for living and recreation. For example, canals could become new urban streets for walking and cycling. Opening up rivers from culverts can create new opportunities for footpaths and recreational areas.

**Communities:** defining past and future community areas, towns and villages (the Black Country is often described as ‘an Endless Village’) according to their distinct ‘character’ which may be defined by physical or cultural associations or a common heritage. Celebrating that character by interpreting it through sympathetic use of materials such as traditional local stone, street furniture, building forms, events, rediscovering heritage and landscape. Developing community-derived design principles, will build on local historic landscape characterisation studies.

### A framework for a Black Country Landscape Plan

D4.18 The West Midlands Regional Spatial Strategy provides a comprehensive range of policies under the heading of ‘Quality of the Environment’. The

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1 ‘Broadening Horizons – A Vision of The Black Country Urban Park’ Lovejoy, September 2004
application of all of these policies (QE 1-9) will support transformation of the Black Country environment. However, the adoption of a new Black Country specific policy under policy UR1A (Urban Renaissance) will help to prioritise environmental change in recognition of the crucial role it needs to play (as identified in the Black Country Strategy) to achieve the Vision aspirations of growth and competitiveness. This policy proposes action to give physical expression to environmental change in the Black Country, principally through the preparation and implementation of a joint Black Country Landscape Action Plan.

D4.19 The Proposed Black Country Landscape Action Plan will define the physical form of the Black Country in accordance with the ‘Black Country as Urban Park’ principles (Corridors, Beacons and Communities) and the Preferred Spatial Strategy. The role of the Landscape Plan will be to provide an action framework to drive transformational change in the Black Country – of the environment, image and legibility. The Plan should enhance the Black Country’s existing character, exploiting assets to create new high quality living and working environments. In addition, it should contribute positively to ameliorating the impact of Black Country development on climate change.

D4.20 The proposed Landscape Plan has three roles:

<table>
<thead>
<tr>
<th>Roles of Black Country Landscape Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) <strong>Strategic role</strong> - driving transformational change in the Black Country to achieve the Black Country Vision.</td>
</tr>
<tr>
<td>2) <strong>Sub-regional role</strong> - providing Black Country people with a sustainable network of accessible natural and historic assets in a manner which will contribute to ameliorating climate change.</td>
</tr>
<tr>
<td>3) <strong>Local role</strong> - contributing to the identity of Black Country’s existing towns and communities and its future communities, providing opportunities for recreation, healthy living and a supportive environment that encourages sustainable patterns of everyday life.</td>
</tr>
</tbody>
</table>

Landscape Action Plan as a Strategic Network

D4.21 Strategic Network of areas for action to drive the structural transformation of the Black Country to achieve the Vision will be defined through six strategic functions:
### Six Strategic Functions of Landscape Action Plan

1. To underpin the **creation of the new quality and desirable residential environments** from:
   - Restructuring of poor quality employment land to residential along key corridors to provide for new housing growth.
   - Remodelling of existing housing areas to stimulate housing market renewal and provide greater variety and quality of homes for mix of communities.
   - Enhancing and growing out (along the housing corridors) from existing areas of residential character and market desirability to create more extensive offer of homes and environment attractive to mobile A/B households.

2. To underpin the **creation of new environments to provide quality employment land locations** to serve knowledge led businesses in the proposed Black Country Employment Land Investment Corridors and Employment Land Opportunity Areas.

3. To **link the four Strategic Centres of the Black Country and the Dudley regional tourism** foci as a network with new vistas, walking and cycling accessibility, recreational opportunities and enhanced image.

4. To promote and **link up, as an interconnected network the two Biodiversity Enhancement Areas** existing within the Black Country, as defined in the Regional Spatial Strategy.

5. To provide **walking and cycling connectivity** for Black Country residents to heritage, open space and recreational assets of regional and sub-regional significance both within the Black Country and in its Environs.

6. To **identify the Black Country** to residents and visitors as a distinct sub-region and as a quality urban area in which to live, work and visit, through enhanced environment, public realm and iconic buildings and structures in the Black Country Centres, at key gateways and on topographical features.
D4.22 A potential Black Country Strategic Network of landscape Corridors and beacons is set out in Map D4.1. The Strategic Network of Corridors and beacons and their prioritisation for action will be defined through the preparation of a Black Country Landscape Implementation Plan. This is a priority action to lead the transformation of the Black Country.

D4.23 The suggested Strategic Network comprises 10 Corridors and 9 Beacons to provide key drivers for environmental led change in the Black Country and external legibility of the identity of the Black Country as a distinctive urban sub-region.
D4.24 The potential Corridors and Beacons are listed in **Table D4.1**, together with identification of their potential strategic role and sub-regional roles. The Black Country Delivery Plan will set out phasing of prioritisation for action.

**Table D4.1**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Potential Strategic Corridor/Beacon</th>
<th>Strategic Function</th>
<th>Potential Sub-Regional Network Role</th>
</tr>
</thead>
</table>
### LC7
**R.Stour: Halesowen – Stourbridge (incl links to Clent Hills)**

| 1. Housing Corridor | 2. Walk/Cycle |
| 1. Housing market renewal | 4. Waterways |
| 1. Housing AB extension | 5. Parkland |

### LC8
**Himley – Fens Pools – Brierley Hill – Amblecote (incl links to Monarch’s Way)**

| 1. Housing Corridor | 2. Walk/Cycle |
| 1. Housing market renewal | 3. Canals |
| 1. Housing AB extension | 5. Parkland |
| 2. Employment Land Investment | 6. Heritage |
| 5. Connect Assets | 7. Topography |

### LC9
**Wolverhampton – Dunstall Park – Tettenhall Canal (incl links to Monarch’s Way)**

| 1. Housing Corridor | 2. Walk/Cycle |
| 1. Housing AB extension | 3. Canals |
| 2. Employment Land Investment | 5. Parkland |

### LC10
**Walsall – Brownhills (incl links to Chasewater)**

| 1. Housing Corridor | 2. Walk/Cycle |
| 1. Housing market renewal | 3. Canals |
| 5. Connect Assets | 5. Parkland |

### Beacons:

| LB1 | Wolverhampton City Centre (Public realm and Art Gallery) | Strategic Centre | 6. Heritage |
| LB2 | Walsall Town Centre (Public realm and Art Gallery) | Strategic Centre | 6. Heritage |
| LB3 | West Bromwich Town Centre (Public Realm and The Public) | Strategic Centre | 6. Heritage |
| LB4 | Brierley Hill Centre (Public Realm) | Strategic Centre | 6. Identify BC |
| LB5 | Dudley Town Centre (Public Realm, and Castle) | Regional Tourism Centre | 6. Identify BC |
| LB6 | Approach to Wolverhampton Station from B’ham | Gateway | 6. Heritage |
| LB7 | Barr Beacon | Gateway | 6. Identify BC |
| LB8 | Turner’s/Darby’s Hill | Gateway | 7. Topography |
| LB9 | Darlaston: Junction 10 M6 | Gateway | 6. Identify BC |

**D4.25** The definition, form and functions of Strategic Corridors and Beacons will be developed through the preparation of a Landscape Plan Investment Plan and associated planning frameworks.

**Landscape Action Plan integrating Sub-Regional Networks**

**D4.26** In addition to the Core Strategic Network of Corridors and Beacons proposed above, the Landscape Plan will also draw together and aim to integrate the following key networks to provide the Black Country and its people with access to sustainable opportunities for recreation, healthy living
and enhanced quality of life. This integrated network will be designed and managed to enable the Black Country to contribute positively to ameliorating climate change at the same time as meeting the needs of its communities. The Landscape Plan will also promote ‘active design’, that is design which gives greater prioritisation to the pedestrian and encourages physical activity thereby contributing towards promotion of healthy living and sustainable development in the Black Country.

D4.27 The seven key sub-regional networks are to be integrated through the Landscape Action Plan. They are set below:

D4.28 A ‘Living Landscapes’ network based upon enhancing the existing Biodiversity Corridors of the Black Country (see Map in Appendix D4). The natural environment will play a vital role in the transformation of the Black Country. A unique opportunity exists to apply the lessons of ‘landscape scale conservation’ to an urban area for the first time, delivering benefits across a wide range of activity, maximising the benefits from the area’s existing assets and attracting major external resources – a Black Country Living Landscape. Within an overall theme of enhancing, making more accessible and promoting the natural environment, Living Landscape will involve six key areas of activity:

1. Delivering the Biodiversity Action Plan.
2. Implementing a European Geopark Management Plan.
3. Engaging communities with their Accessible Natural Greenspace.
4. Supporting Lifelong Learning through environmental education and skills training.
5. Developing Natural Heritage Tourism.

D4.29 A Walking and Cycling network which connects communities to strategic, town and local centres and with recreational, heritage and open space assets of regional and sub-regional attraction both within the Black Country and in its immediate environs. (Existing walking and cycling routes to be connected and enhanced are mapped in Appendix D4).

D4.30 A Canal network which enhances the accessibility to, use of and quality of the environs of the Black Country’s 177 kms of canals within the framework of the development of the Black Country and Birmingham’s proposals for World Heritage Status for its canal network and its environs. To include opening out new vistas and remodelling of network of locations for urban living and new ‘streets’ along canals as set out in the Black Country Broadening Horizons Report and as a network for connectivity between communities and enhanced recreational opportunities (see map in Appendix D4 of existing canal network below).

D4.31 A Waterways and Water Features network which provides recreational opportunities for people and informal areas for wildlife. There are great opportunities in the Black Country to enhance the quality of existing rivers and to open out rivers that currently go underground in culverts. In addition the use of sustainable drainage techniques can provide new...
opportunities for water features, whilst giving effective flood risk management now and in the future when climate change could increase the risk of surface water flooding. A strategic and integrated approach to water management would help deliver the water quality improvements required by the EU Water Framework Directive. These features require positive planning and enhancement as a network and as an asset for quality and healthy living. (Waterways, water features and floodplains are mapped in Appendix D4 as a basis for the creation of this new network facility for the Black Country).

D4.32 A Parkland network which connects the Black Country’s existing dispersed network of open spaces, parks, recreational facilities and Green Belt, leading to enhanced quality and accessibility and greater provision of sporting and recreational opportunities. Urban Parks also have great heritage and historic value including their landscape design and as early examples of derelict land reclamation (Existing open space, woodland and Green Belt provision in the Black Country is mapped in Appendix D4).

The Green Belt in the Black Country

Historical Perspective

The Structure Plan for the West Midlands Metropolitan County was approved by the Secretary of State in 1986. This included the first comprehensive diagrammatic representation of the Green Belt adjacent to the built up areas of the conurbation and Coventry.

The Structure Plan was informed by a Green Belt Local Plan. This Local Plan examined, defined and justified detailed Green Belt boundaries. Although the Local Plan was not taken forward on a statutory basis, its contents were absorbed by subsequent District Local Plans, which together have maintained the raison d'être of the comprehensive plan.

The Green Belt around the built up area in the Black Country, as with Birmingham, Solihull and Coventry, covered two types of rural area, namely:-

1) Open countryside which blended with the rural areas of adjacent Shire Counties; and

2) Green wedges which comprise the major part of the Black Country’s Green Belt.

The green wedges are regarded as having a particular multi-purpose role in the life of the Black Country. They provide strategic wedges of open land which connect open countryside to the heart of the built-up area.

The wedges follow river valleys and/or provide the residue of land between towns which have expanded during the twentieth century. The wedges thus provide a critical strategic role in preventing coalescence, and
maintaining the distinctiveness between sub areas of the Black Country.

Equally, these wedges provide highly-valued and well used green “lungs” for a range of recreation and leisure activity both formal (e.g. parks) and informal (e.g. horseriding and stabling). They offer opportunity for all groups in the varied Black Country communities to benefit from the openness of the land.

In United Kingdom terms it is unusual for such wedges of open land to reach into areas adjacent to many of the most deprived older area communities exhibiting signs of multiple deprivation. They add extra value to countering the negative aspects of the local living environment.

**Black Country Study and the Green Belt**

The Black Country Strategy is essentially based on recycling previously developed land. The emphasis in strategy upon the quality of environment and its importance means that the green wedges will be protected and reinforced and will complement the emphasis upon uses of previously developed land for development.

The strategy technical work has identified that housing needs can be accommodated both to 2021 and 2031 within the built-up area, and most employment needs except for regional scale (50ha+) logistics facilities can be accommodated. Such facilities are not appropriate in the built up areas are unlikely to be capable of being accommodated in any of the green wedges without prejudicing their purpose. The RSS Phase Two revision will identify suitable broad Regional locations for these facilities.

The capacity studies for housing and employment land provide evidence that potential land to meet respective needs, apart from large-scale logistics, could be identified for progressing to 2031 the rate of RSS growth proposed to 2021. This consolidates the strength of Black Country resolve to retain and enhance its green areas as the interface between the built-up areas and the countryside.

D4.33 A **Heritage network** which enhances the environmental setting, access to and appreciation of the wealth of historic assets in the Black Country. The geological diversity of the Black Country underpins the appearance of heritage. Much heritage is also located around the canal network and reflects on the role played by the Black Country in pioneering the urbanised industrial revolution. However, as with many of the Black Country’s water features, the canals are often hidden and insufficiently recognised and promoted as an asset. Historic Landscape Characterisation work is currently being undertaken which will contribute to this. The Black Country aspires to the creation of a truly Black Country-wide integrated tourism offer for residents and visitors building on the potential agglomeration of assets around Dudley town centre and the pioneering Black Country Living Museum which has brought together assets relating to Black Country life that would otherwise have been lost in the past. (A map in **Appendix D4** illustrates the range of such heritage assets).
D4.34 Topography provides the seventh element to be integrated through the Landscape Action Plan. The hills and valleys of the Black Country, forming the watershed of England, between two of Britain’s major river systems (the Trent, represented by the River Tame in the Black Country, and the Severn, represented by the River Stour), provide the distinctive backdrop to the development of this integrated network. Often hidden by buildings, opportunities should be identified to open out vistas of distinctive topographical features such as the Rowley Hills and Barr Beacon and provide access to vistas from such features. (The Black Country topography is illustrated in Appendix D4).

D4.35 Communities and Centres lie at the heart of local identity and urban form. Local Strategic Partnerships in the Black Country Boroughs have identified some 280 natural communities within the Black Country (see Appendix D4). These represent community perceptions and identity at the most local level and include many older settlements based around towns and villages created through the industrial revolution together with newer communities established between these settlements, particularly since 1950 in the form of Council housing estates.

Landscape Action Plan as Local Networks

D4.36 Many of these settlements invoke a considerable sense of identity, particularly for older residents, but their legibility on the ground is often poor and they do not provide such a clear identity for new residents and visitors. Such settlements are assets which should be enhanced through the implementation of a Landscape Plan for the Black Country. The Black Country Broadening Horizons Report sets out suggestions as to how this may be achieved through physical and environmental action, driven by local communities themselves, to provide a legible identity for residents and visitors alike. We also propose to develop identity through cultural and recreational activity, notably through the promotion of a Black Country Festival based on celebrating local community events.

D4.37 Traditional centres and new centres (where new communities are established on former employment land where no existing centre exists) will be enhanced and promoted as places where social, cultural and recreational facilities and activities are provided as well as being the nucleus for local shops and services. They will be incorporated into the development of the Landscape Plan through the promotion of safe and pleasant access from communities by walking and cycling. Local centres and neighbourhoods will be enhanced using the same principles, thus improving access by walking and cycling within communities for basic daily needs.

PRIORITIES FOR ACTION

D4.38 To demonstrate commitment to the environment and create confidence amongst developers, business and communities, it is considered that the Landscape Plan should be progressed as a priority action within the next
year, following the framework as set out above drawing upon existing strategic and technical work and projects.

D4.39 The Landscape Plan, Black Country as Urban Park and urban design principles will provide input to the statutory planning process, in particular the Joint Black Country Core Strategy and local authority LDDs. Government will be pressed to designate the Black Country as an ‘urban park’ with regional/national status.

D4.40 Implementing the concept of the ‘Black Country As Urban Park’ involves bringing forward proposals for Black Country-wide sustainable design policies above and beyond national standards. It is important to ensure that high quality and sustainable design is embedded in the future built environment and landscape of the Black Country. This includes creative reuse of existing buildings as well as new build design and the creation of sense of place. Policies should build-in sustainability through design – in order to contribute to carbon emission reduction in buildings, resource conservation, health improvement and crime reduction.

D4.41 In doing so, there should be a far greater contribution to Government targets for carbon emission reduction, waste recycling, renewable energy generation and the provision of accessible natural greenspace.

D4.42 Running in tandem with the proposed Landscape Plan there will be a Living Landscapes lottery bid; the Management Plan necessary to pursue the designation of the canal network as a World Heritage Site; and a bid for European GeoPark status which are currently being pursued.
D5 CREATING A WORKFORCE FOR THE 21ST CENTURY

THE CURRENT POSITION

D5.1 The future of the Black Country rests in a diverse, knowledge-based economy; this can only be delivered with a highly skilled local workforce. Yet the current situation is that far too many local people have no qualifications and far too few possess higher level skills. Nationally, 15% of adults have no qualifications. In the Black Country it is 22%. Similarly, 25% of adults nationally have higher level qualifications (Level 4+). In the Black Country it is just 16.8%.

D5.2 Local young people are underperforming at GCSE level; the pass rate for five A*-Cs is 49.1% in the Black Country compared to 56.3% nationally. Following GCSEs, fewer young people continue their education post-16, and fewer progress into higher education than elsewhere in the country. There continues to be discernable differential rates of education achievement across communities, which is unacceptable. In some circumstances these gaps continue to widen.

Table D5.1 Education and Skills in the Black Country

<table>
<thead>
<tr>
<th>Indicator:</th>
<th>Current (2005)</th>
<th>Scale of the Challenge</th>
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<tbody>
<tr>
<td></td>
<td>Black Country</td>
<td>England</td>
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</table>

**Children and Young People**

- % of 7 Years Old Achieving KS2 L2 Reading: 81.5% 85% 502
- % of 7 Years Old Achieving KS2 L2 Writing: 77.5% 82% 646
- % of 7 Years Old Achieving KS2 L2 Maths: 87.3% 91% 538
- % of 11 Year Olds Achieving KS2 L4 English: 73.3% 79% 520
- % of 11 Year Olds Achieving KS2 L4 Maths: 68% 75% 846
- % of 14 Year Olds Achieving KS3 L5 English: 68% 74% 838
- % of 14 Year Olds Achieving KS3 L5 Maths: 67% 74% 985
- % of 15 Yr Olds Achieving the Equivalent of 5 GCSE’s grade A*-C: 49.1% 56.3% 1,043
- % of 15 Yr Olds Achieving the Equivalent of 5 GCSE’s grade A*-C including Eng & Maths: 34.5% 44.3% 1,419

**Working Age Population**

- % who have achieved NVQ Level 4+: 16.8% 25% 52,000
- % achieved NVQ Level 3: 13.4% 14.7% 8,000
- % achieved NVQ Level 2: 15.1% 15.3% 1,000
- % achieved NVQ Level 1: 15.9% 14.9% -6,500
- % with Trade Apprenticeships: 6.6% 6.2% -2,000
- % with Other Qualifications: 10.1% 9% -7,000
- % with No Qualifications: 21.7% 14.8% -44,000

Source: Black Country Observatory.
The Key Stage data is taken from the DfEs and relates to 2005 data; the qualification data is taken from the 2003 Labour Force Survey.
D5.3 Clearly, there is a great deal of catching up to do, but there are signs that initiatives are heading in the right direction. Young people’s achievement rates at GCSE improved between 2003-2—4, with a higher percentage gaining five A*-Cs. Last year, 300 more 16-18 year-olds participated in full time education and each year a higher proportion of those who participate are succeeding.

D5.4 The proportion of people Not In Employment Education or Training (NEET) fell from 10.6% in 2004 to 8.4% in 2005, although this was still above the national average of 7.9%. Moreover, adults have benefited greatly from the introduction of the Employer Training Pilot which reached over 5,000 learners in its first year of operation.

D5.5 Despite the many successes of the four partner local authorities in relation to raising educational achievement, it is recognised that the sub-region is not closing the gaps at a sufficient rate of progress.

THE SCALE OF THE CHALLENGE - WHY THERE IS A NEED TO ACT

D5.6 The Vision sets a bold agenda for growth of the economy towards knowledge-based activities with the aim of reducing the income gap with the rest of the country. The Economic Study identified the need for 160,000 new jobs by 2021 – 101,000 in the service sector. Many of these jobs will require specific high level skills, such as degree-level, managerial and professional qualifications.

D5.7 Major skills shortages – particularly at higher levels – are in danger of prejudicing the Vision. Based on 2001 consensus data, there is a requirement for 80,000 more residents with NVQ Level 3+ by 2031, of which 60,000 will need NVQ Level 4 or above. A key challenge will be to stem the leakage of graduates and A/B income groups: Delivering on objectives for housing, centres, environment and the economy will therefore be critical.

D5.8 The challenge for the Black Country is to ensure a workforce fit for the future that is able to take advantage of the jobs and opportunities arising from the planned scale of growth. This means ensuring that young people and adults possess the education and skills to meet the needs of employers in high value-added sectors.

MAKING IT HAPPEN: THE BLACK COUNTRY EDUCATION AND SKILLS STRATEGY

D5.9 “In 2033 the Black Country is a confident, ‘we can do it’ place. We are proud of our skills, our proficiency and our work ethic – these are key to our prosperity.” The Draft Black Country Regeneration Framework “Shaping The Future.”
D5.10 Local children entering the education system today represent the workforce of the Black Country in 2030. If they are to succeed, attitudes need to fundamentally change towards learning in many parts of the sub-region. From an early age, learning needs to be challenging and enjoyable to encourage more young people to stay on in education or training post-16. At the same time, high quality advice and guidance is necessary to help them make the right choices.

D5.11 In an increasingly global, knowledge-based economy, young people must be equipped with the skills to succeed in a highly competitive economic climate. Basic writing, reading and numeracy skills are a prerequisite while science, technology and languages will become increasingly valuable. There is a need to foster a culture of enterprise and innovation from an early age.

D5.12 The extent of the challenge locally means that the four Black Country LAs, University of Wolverhampton, LSC and other stakeholders, together with external partners, must look at strengthening collaboration; galvanising and focusing their energies on those key activities which will make the difference. The Black Country has a history of collaboration through the Black Country School Improvement Partnership. These collaborations need formalising and extending within a Memorandum of Understanding which clearly sets out the roles and responsibilities of key partners to include a clear strategy for attracting the necessary investment and refocusing existing resources where appropriate to deliver the agreed Education and Skills strategy. Individual local authorities will also prioritise their own actions in relation to the strategy through their Local Area Agreements and LSP plans. Working together provides a stronger vehicle and enhanced leverage in relation to the campaign to build confident aspirational proficient and self-sufficient local neighbourhoods.

D5.13 Sub-regional transformation will take up the challenges arising from The Green Paper “Every Child Matters” and the call to focus on transforming curriculum/learning experiences to facilitate personalised learning. These will be key components of local reform. The sub-regional strategy must mirror the national aims of:

Ensuring that every child has the chance to fulfil their potential by reducing levels of educational failure, ill health, substance misuse, teenage pregnancy, abuse and neglect, crime and anti-social behaviour among children and young people.

"Giving every single child the chance to be the best they can be, whatever their talent or background”. D.Milliband 2004

D5.14 The Black Country will also strive for those outcomes regarded as important by local communities as identified through national consultation:

- **Being healthy** – enjoying good physical and mental health and living a healthy lifestyle.

- **Staying safe** – being protected from harm and neglect.
• **Enjoying and achieving** – getting the most out of life and developing the skills for adulthood.

• **Making a positive contribution** – being involved with the community and society and not engaging in anti-social or offending behaviour.

• **Economic well being** – not being prevented by economic disadvantage.

D5.15 The core themes of the Plan have been developed in partnership with the Local Authorities (Directors of Children and Young People’s Services), the LSC, ConneXions, the University of Wolverhampton and the School Improvement Partnership. In future, their strategic planning will be set in the framework of the Plan. The recent mini visioning event marked a step change in commitment to taking a collective approach to raising aspirations for education attainment and developing skills to a higher level. This was accompanied with a new sense of urgency to translating the agreed Education and Skills Strategy “Enjoy and Achieve” into an innovative, radical action plan accompanied by a clearly costed investment strategy and robust monitoring framework. The Consortium have requested that Sir Geoff Hampton, Pro-Vice Chancellor, University of Wolverhampton, should take the strategic lead upon the delivery of this plan.

D5.16 While the Plan focuses on tailoring education and skills towards the needs of the local economy, the important contribution education and skills will make to other outcomes is clearly recognised. For example, young people who enjoy their learning are more likely to be high achievers. In turn, young people with high aspirations and self-esteem are more likely to adopt safe and healthy lifestyles and make a positive contribution to social regeneration.

D5.17 This plan therefore will play a significant part in delivering the regeneration of our local neighbourhoods. To be successful in our endeavours there needs to be a significant reduction in the long term cost of education deficit: antisocial behaviour, crime, poor health and drug abuse. The plan will also exploit the opportunities/resources available through city region working and through Higher Education to include lifelong learning networks. It will also look to redress the impact change on potential loss of high skilled residents.

D5.18 **The Black Country Education and Skills Plan** covers all phases of learning. It is divided into two sections:

1) ‘**Enjoy and Achieve**’ sets out our priorities for early years development through to the critical 14-19 period;

2) ‘**Every Adult and Business Matters**’ covers adult learning and how we intend to make learning more demand-led;
In addition, a set of key indicators are agreed to measure success over the forthcoming years.

D5.19 The plan is:

- Focused on adding value to individual local plans in meeting the needs of local neighbourhoods;
- Being developed in partnership with that community and in a language that is accessible to all;
- The basis/rationale for developing new programmes and targeting funding;
- Built on pockets of excellence which can be extended/replicated across the sub-region;
- A vehicle for all stakeholders to develop and improve their provision;
- It needs to fully engage the local communities;
- Enlist effective partnership working with private providers;

D5.20 The plan will set out how agencies will:

- Provide options for transforming current learning opportunities from early years through to adulthood;
- Build capacity through establishing effective delivery networks;
- Include effective strategies to tackle the unacceptable numbers of disengaged learners;
- Ensure enhanced support/prioritise strategies to improve the life chances of vulnerable children and young people;
- Provide framework to help schools/learning organisations evaluate themselves honestly;
- Work with/for - local neighbourhoods;
- Address under-performance in learning organisations through a framework of support and challenge;
- Invest in e-learning to include the development of a sub-regional e-framework;
- Work to provide the very best learning environment for all learners to include maximum impact of both capital build and the Academies programmes;
• Provide an integrated planning framework for all education and skills partners within the Black Country, which includes non-negotiable commitment but allows for local responses;

• Facilitate clearer engagement of all parts of the learning and skills sector with the modernisation and diversification agenda, including the work around the knowledge economy;

• Include proposals for making available funding streams work better together (eg Regeneration Zones, Corridor Funding);

• Tie into the other key strands of activity emanating from the study in order to bring about a true renaissance for the sub-region;

• Build agreed priorities into local area agreements and ensure synergy between the work on education and skills and other priorities within the Black Country Study;

• Ensure that those who are most vulnerable in neighbourhoods, at whatever stage of their learning, will be included and that differential rates of education achievement across our communities are tackled effectively;

D5.21 A Task Force is being set up under the leadership of the University of Wolverhampton to develop the Action Plan including clear timescales and resource requirements. Following initial audit activity through the Black Country Observatory and self evaluation of local partners, the first focus areas for activity will be:

• Specific activity at key phases of education to include meeting the challenges at the new 14-19 implementation plan.

• Improving the numbers of young people progressing to Level 3 and beyond.

• Improving attainment in mathematics and numeracy at all phases

• Improving attainment through the use of new technologies.

D5.22 Cross-cutting strands in the Action Plan will focus on:

• Securing the very best workforce within Black Country learning organisations and maintaining high quality through a first class CPD framework;

• Developing leadership at all levels to include effective succession planning;
• Closing the gap: working to ensure all learning organisations perform as well as our best, providing additional support and encouragement as necessary;

• Developing cutting edge pedagogy to include maximum use of research, national and international links.

• Enhanced support for high achievers to include effective strategies for ensuring they continue to learn and work within the sub-region.

• A high quality, engaging curriculum which meets local needs, provides high quality learning pathways and engages and motivates learners at all levels.

<table>
<thead>
<tr>
<th>Education and Skills Action Plan</th>
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<td><strong>Initial Goals</strong></td>
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1. Establishing a planning/consultation process through setting up:
   - Professional Programme Board  March 2006
   - Task Force to harness appropriate expertise  May 2006
   - Working groups for each identified focus area  June 2006
   - Establishing a range of visits/consultation events to engage key stakeholders  June - September 2006

2. Drawing up a three year costed plan for agreed focus areas/generic frameworks  July 2006

3. Setting out a clear investment strategy to include both realignment of existing funding and securing increased investment at both regional and national level. This will include a clear evidence base of the financial benefits resulting from successful delivery of the strategy in relation to impact on workforce and resulting economic regeneration. The investment strategy will focus on making a case for enhanced support for identified neighbourhoods experiencing particular challenges.  August 2006

4. Developing the role of external agencies/partners in supporting delivery.  August 2006
D5.23 Key strands of the strategy are currently being developed, consulted on and agreed. The agreed 14-19 strategy set out below demonstrate the commitment to collaborative step change.

**Strategy for Raising Educational Achievement in the Black Country 14-19 - Priorities for Action**

This part of the overall strategy is built around ten clear priorities for action, which will be delivered whichever form of institution the young person attends.

1. The planning of provision will be driven by:
   - An analysis of the needs of employers, and of the needs and aspirations of young people and their advocates.
   - An analysis and evaluation of the present provision.
   - A clear statement of what each young person can expect from the education system, alongside a statement of their responsibilities.

2. Coherent processes will be in place for monitoring, reporting and improving the quality of provision. These processes will be driven primarily by the internal performance management system of each provider, backed up by effective overarching performance management systems driven by the relevant planning authorities in each area. These will focus on the scrutiny of an organisation's self-evaluation. Local performance will be reported against a set of agreed targets and performance indicators. The systems will focus both on exchange of good practice and on challenge of under-performance, and will involve targets and a development plan for each provider. Bureaucracy will be minimised by ensuring quality management systems align with inspection frameworks.

3. Each learner will have an individual learning plan to provide support and challenge in order to raise achievement, and ensure that learning is purposeful and appropriate for the individual. Individual steps towards achievement will be celebrated and built upon and their programmes of learning will be personalised.

4. Providers of education and training will work together in collaborative consortia to ensure that young people have the widest possible choice of relevant learning opportunities at the right level. Opportunities to use electronic learning will be maximised to increase access to high quality relevant learning materials and progression information.

5. There will be an area prospectus of learning opportunities available to each young person. This will describe in a coherent format the opportunities available for young people.
6. There will be a coherent framework of high quality vocational learning opportunities commencing at 14, building qualifications between the different stages of education and maximising progression opportunities into employment with training, or into higher education.

7. Learners will make decisions on their learning programmes informed by high quality independent advice and guidance.

8. The aspirations of young people of all abilities will be raised by developing a network of guaranteed places in universities and employment linked to the achievement of individual learning plans. Awareness of progression opportunities will be maximised and young people will be motivated to achieve purposeful progression from 14-19 education into higher education or employment. This network will also commit to meeting the needs of young people with learning disabilities by providing appropriate progression routes and associated support programmes to ensure access.

9. There will be a programme of continued professional development for managers, teachers and trainers to ensure provision remains relevant to the changing needs of young people and their future employers in the Black Country economy.

10. The partners’ investment strategies will be co-ordinated to provide young people with high quality stimulating and challenging learning environments. These will offer a choice of specialist facilities. Planning bodies will work together to maximise the opportunities for young people to take advantage of the specialist facilities and expertise available in schools, colleges, work based learning providers, universities and employers.

EVERY ADULT AND BUSINESS MATTERS: STRATEGY FOR TRANSFORMING ADULT AND EMPLOYER LEARNING

D5.24 The Enjoy and Achieve Strategy (0-19) will work alongside the agreed strategy for raising the shills of adults and the workforce as set out below.

D5.25 This strategy is built around eleven clear priorities for action and will be committed to by all organisations that deliver skills and learning advice and opportunities in the Black Country

D5.26 Employment in the Black Country has traditionally been heavily dependent upon the Manufacturing Sector and much of the employment in the Black Country has been that of low skill, low pay.
D5.27 However, this picture is changing radically right now, with a shift away from traditional manufacturing, increases in public and services sector and a demand for more knowledge workers.

D5.28 The challenge for the Black Country is to ensure a workforce fit for the future that is able to take advantage of the jobs and opportunities of a local economy that requires higher-level skills. This means not only making a fundamental impact on the skill levels of adults in the Black Country, but ensuring that Young People come out of the education system equipped with the skills that employers want and that enable them to continue to progress their training and development throughout adulthood.

D5.29 The Black Country continues to have a high number of people who do not have the essential skills they need in reading, writing and numeracy. There are insufficient numbers of adults with Level 2 qualifications. Agencies must tackle these two issues to ensure the workforce is equipped to support the diversifying economy of the Black Country. There will be many employment opportunities within the Black Country over the next 8-10 years but they will be of a very different order to historic skills and employment sectors. The Black Country needs to realise the human capital in its local economy and within its businesses in order to address the future demand for the knowledge workers needed into the future in the Black Country.

D5.30 The other critical area that needs to be addressed is the enthusiasm with which local employers embrace training and development for their workforce and the investment they are prepared to make in the skills of those they employ. Very often skills shortage issues can be overcome by building the existing workforce to adapt to a diversifying business base. More employers will be encouraged to invest in their people makes to make a real difference to their profitability, their capacity and their competitiveness.

**Strategy for Transforming Adult and Employer Learning**

1. The LSC will commission changes to the supply of provision that will be driven by:

   - An analysis of the current and future needs of employers, in conjunction with the Sector Skills Councils.

   - An analysis of the needs of adults to ensure they are able to become or remain economically active and competitive within the workplace.

   - An Analysis and evaluation of present provision, particularly its responsiveness to its client base and adequacy to meet future skills needs.
• A determination to ensure that there is an appropriate range of specialist provision delivering training to the highest standards of good practice in industry and commerce.

• Employers being able to directly influence the core provision of education and training that meets their needs.

2. Providers will work together to ensure employers are able to access relevant, high quality, flexible, responsive provision delivered at a time, pace and place to suit their needs.

3. Building on the existing Skills Hotline a system will be in place, available through one portal, which enables access to a brokerage service that can source appropriate training provision from a comprehensive database enabling provision that can be designed and shaped to meet employers’ needs.

4. The highest priority will be given to ensuring that all adults will have access to learning opportunities available to them that enable them to be competent in essential skills and that these learning opportunities lead to a relevant qualification.

5. All adults without a qualification to level 2 will have the opportunity to access learning to enable them to achieve this.

6. There will be a local area prospectus of all provision available for adult learning across the Black Country.

7. High quality information, advice and guidance will be easily accessible for those who most need it to ensure that they are aware of all of the progression and career opportunities available to them through further learning.

8. First Steps learning will be increasingly designed to lead to accredited qualifications and further progression through to Level 2.

9. High Quality and relevant Level 3 and Level 4 provision that is responsive to employer demand in priority skills areas will be in place and will be of a standard which meets employers’ needs flexibly and which employers are prepared to invest in.

10. The quality and location of adult training facilities will be enhanced via an active programme of updating and/or construction of facilities.

11. Work with employers through employer networks to encourage and support employer engagement in 14-19 strategies to ensure people entering employment are prepared for the world of work.
**PRIORITIES FOR ACTION - NEXT STEPS**

D5.30 The principles of the Education and Skills Plan will be embedded in all Community Plans and Education Plans. Partners will establish targets at five year intervals to coincide with milestones in the Black Country Study and the Black Country Observatory monitoring framework\(^1\). The monitoring framework consists of three levels of detail as illustrated in the image below:

<table>
<thead>
<tr>
<th>Levels:</th>
<th>Monitoring &amp; Evaluation Framework:</th>
<th>Policy Relation:</th>
<th>Reporting:</th>
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<tbody>
<tr>
<td>1</td>
<td>Key Indicators &amp; Aspirational Targets</td>
<td>Enjoy &amp; Achieve</td>
<td>Report to Professional Programme / Board BC Consortium</td>
</tr>
<tr>
<td>2</td>
<td>Headline Indicators and Targets</td>
<td>Lea Education Plans, LSC Annual Plan, Connexions</td>
<td>BC Observatory Annual Education Barometer Report</td>
</tr>
<tr>
<td>3</td>
<td>Detailed Set of Indicators</td>
<td>Joint Area Review/ Every Child Matters</td>
<td></td>
</tr>
</tbody>
</table>

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\(^1\) Detailed information on the Monitoring Framework is available in the Black Country Observatory’s report: "Black Country Education Strategy, Monitoring & Evaluation Framework, April 2006, which is available on [www.blackcountryobservatory.co.uk](http://www.blackcountryobservatory.co.uk)
D5.31 **Key indicators to measure are agreed.** These are:

- Level of development reached at the end of the Foundation Stage, including narrowing the gap in the 20% most disadvantaged areas;
- Percentage of 7 year olds achieving Level 2+ at KS1 in Reading, Writing, Maths and Science;
- Percentage of 11 year olds achieving Level 4 in English, Maths and Science;
- Educational achievement of 11 year old looked after children compared with peers in English, Maths and Science;
- Percentage of 14 year olds achieving Level 5+ in English, Maths, Science and ICT;
- Take up of sporting activities by 5-16 year olds;
- The percentage of children and young people who state they have been bullied in last 12 months;
- The percentage of children and young people participating in the social life of their learning institution;
- The percentage of institutions causing concern, or receiving reports from inspectorates indicating that provision is under performing;
- % of half days missed through absence;
- The percentage of 15 year olds achieving 5 A*-C grades at GCSE;
- The percentage of 15 year olds achieving 5 A*-C grades including English and Maths at GCSE;
- The percentage of 15 year olds achieving A*-C grades at GCSE in English and Maths;
- Educational achievement of 15 year old looked after children compared with their peers;
- Take-up of cultural and sporting opportunities among 16+ year olds;
- The percentage of 16 year olds not involved in employment, education or training (NEETs);
- The percentage of young people with learning difficulties and disabilities not involved in employment, education or training age 16 as a % of the 16 year old cohort;
- The percentage of young people participating in full-time post-16 education as a % of the 16 year old cohort;
- The percentage of young people participating in apprenticeships or advanced apprenticeships as a % of the 16 year old cohort;
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- 16-18 Further Education participation;
- 16-18 Apprenticeship participation;
- 16-18 Entry to Employment participation;
- 16-18 School Sixth Form participation;
- Overall 16-18 Further Education Success Rate;
- Overall 16-18 Work Based Learning Success Rate;
- Average Advanced Level Point Score in School Sixth Forms;
- The number of young people from the Black Country entering Higher Education;
- Proportion of young people who attain level 2 at 19 years of age;
- Proportion of young people who attain level 3 at 19 years of age;
- Full Level 2 19+ participation;
- Full Level 3 19+ participation;
- Literacy, numeracy and ESOL achievements (all ages);
- Overall 19+ Further Education Success Rate;
- 19+ Full Level 2 Achievements;
- 19+ Full Level 3 Achievements;
- 19+ Level 4+ achievements;
- Percentage of establishments who funded or arranged training for staff over past 12 months;

D5.32 Attracting significant investment to support such a plan is a key task over the next nine months. This will need to reflect the building up of sustainable mainstream activity rather than purely a range of short-term project/pilots.

**WHAT IS NEEDED FROM OTHERS**

D5.33 A sustainable programme will be established that doesn’t depend on ‘one off’ funding. However we should look to DfES/ODPM/regeneration to support a significant investment strategy in order to provide infrastructure/set up activity set in the context of longer-term sustainability. Some new solutions are needed as well as taking from the successful work emanating from successful programmes such as the London Challenge. The Private Sector also needs to be engaged as a key investor.

D5.34 Challenging/enabling relationships will be built with national bodies to support:

- QCA: critical friend in development of mathematics.
- MP: champion/advocate.
- ODPM: support of investment.
- TDA: support in recruiting/retaining a first class workforce for our learning organisations.
- NCSL: support for succession planning, high quality professional development for school leaders.
SSAT: cohesive approach to using skills, specialisms of schools, enhanced professional development opportunities.
D6 CREATING A PROSPEROUS, DIVERSE AND HARMONIOUS SOCIETY¹

BLACK COUNTRY COMMUNITIES TODAY

D6.1 The Black Country developed historically as a network of distinct communities. After the second world war these settlements grew and coalesced as housing shortages were eradicated and population grew. Some of the communities in the traditional towns and newer estates of the Black Country have been economically and physically deprived and isolated as a result of rapid economic restructuring and consequent decline in traditional industries. More recently new communities have once again become established in the Black Country as a result of international migration driven by political and, most particularly, economic circumstances. In short migrant communities are attracted to the Black Country in search of a better life and greater opportunity for advancement for themselves and their families. These communities bring with them varying levels of skills and expertise but all show a degree of dynamism reflected in their decision to relocate themselves. New generations of these communities are all Black Country people though they adhere to a variety of cultural norms.

D6.2 Many of these new migrants are from black and ethnic minority (BME) communities who now make up some 15% of the Black Country population

D6.3 These BME communities represent a major opportunity for future economic growth and competitiveness in two significant respects. Firstly, they are often at the forefront of the creation of the knowledge society and economy today through their drive towards educational achievement and their entrepreneurial activities. This particularly applies to the Indian community who have a significant presence in the Black Country. Secondly, these communities also contain within them a large degree of untapped potential to drive future growth – potential in skills, education enterprise and economic activity – which is currently restricted through poor levels of education and skills and lack of access to opportunities. The same can also be said of large elements of well established communities, notably white working class boys from poor families.

D6.4 There has been insufficient success in converting the potential of all Black Country communities into success and prosperity. Indeed, the relative gap between the richest and poorest in society has continued to increase and with the trend for the most economically successful to move out of the Black Country, there is an increasing concentration of deprived communities in the Black Country despite the wealth of interventionist public programmes over the last 3 decades. (Section D3, para 3.10).

¹ This Chapter draws significantly on the evidence presented by Gurbux Singh in his report 'Diversity and the Black Country Study', March 2006.
Alongside this there has only been a limited move towards desegregation of migrant and host communities. Three main factors have worked together to prevent desegregation in the Black Country:

1. A general lack of economic success amongst migrant communities.

2. A conscious desire to remain within and close to existing communities and cultural facilities.

3. A fear of social and physical isolation particularly when a community feels vulnerable.

There is no uniform position for BME communities with respect to their experience or response to these factors. The Indian community has been the most successful when measured against educational attainment, access to Higher Education, entry into the labour market and economic success more broadly. It has shown the greatest signs of economic integration, with higher rates of economic participation, and greater presence in the higher skilled, professional and managerial sectors. As a result it has achieved the greatest levels of housing desegregation from traditional areas of settlement. This is not to say, however, that there is no poverty amongst the Indian population.

There is significant evidence of ‘next steps’ movement in the Indian community (but retaining some proximity to culture and religious facilities) as well as extending choice to aspirational housing in suburban outer adjacent areas. There are risks that the most economically active section of the Indian population will move out of the Black Country to outer residential areas, or even move out of the West Midlands region altogether. Both the Indian and Muslim populations have experience of internal movement within the UK. During the economic recession of the 80s there was some movement to London and the south by Indians and some limited movement to the north and Scotland by the Muslim community.

There is clear evidence that Bangladeshi and Pakistani communities have further intensified their residential location over the period of the last two censuses and this is predicted to continue. They experience low levels of labour market participation, low wage rates, higher unemployment, and location in the most vulnerable sectors of the economy. This is reinforced by a greater desire to remain within current ethnic concentration with community and religious facilities which prevents significant spatial movement.

Current limited levels of education attainment in the Bangladeshi and Pakistani communities suggests limited opportunities for desegregation for newly forming households from existing community concentrations – rather a greater level of intensification causing higher overcrowding in low value housing. Muslim children now do least well in schools (or as poorly as Caribbean and white working class boys) and although participations rates are reasonably high the evidence from the LSC is that it is on low level and non-vocational courses not leading to potential higher level employment.
Entry into Higher Education is not at the national average. In terms of future housing choice the Muslim community will continue to be located in the existing core areas with some expansion into adjacent poor low value housing. There is the further potential of some Muslim households currently located in Birmingham relocating into terraced housing in the southern central core of the Black Country, increasing concentrations in Walsall and Smethwick, as pressure builds in existing community areas in Birmingham. For these communities social housing appears not to be a real option, in part by choice but also as a result of limited growth in the sector as focus of public expenditure priorities will be on the improvement of public stock to achieve the decent homes standard.

D6.10 The Caribbean community is concentrated significantly within the public sector and the poorer end of owner occupation. There is evidence of a greater degree of desegregation than the Muslim community but the population are still confined to limited core Black Country areas. These communities also have higher rates of unemployment, low wage rates, and low educational attainment by boys in school. However, there is growing evidence of higher participation rates by the Caribbean female population and increasing entry into the professional and managerial categories. This will have some impact on widening choice.

**SCALE OF THE CHALLENGE**

D6.11 There are already communities which live parallel but separate lives from the general experience of life in the Black Country. These communities which are not part of wider society are not just Muslim, include also alienated Caribbean and poorer Indian communities concentrated in the most deprived neighbourhoods.

D6.12 There are also poor white working class communities, sections of whom are, and are likely to continue to be less in harmony with some minority communities. Trends are for increasing opportunities for conflict to grow between all of these parallel and alienated communities with increasing divergence of economic performance. Additionally, increasing competition from naturally growing communities over scarce resources, notably housing, means increased risk of a breakdown in social cohesion.

D6.13 If policy changes are not implemented then the following are the likely scenarios for our BME, migrant and poorest communities:

<table>
<thead>
<tr>
<th><strong>Indian</strong></th>
<th>Most successful population. Substantial desegregation and spatial distribution. Continued economic success based on high educational attainment and entry rates into labour market. Greatest signs of economic integration, high rates of participation, increasing professionalisation. Widening housing choice into aspirational housing in suburban fringe, next steps housing into higher value.</th>
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</table>

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Some risk of outward migration into other English regions particularly London and South.

A sizeable % of poor people located in the traditional central areas, but greater potential for social, economic and residential integration.

| **Chinese** | Population smaller than all other groups. Highest educational achievers at key stages 3 and 4, and high rates of entry into Higher Education. Many households engaged in the private sector, often in catering. Increasing evidence of diversification in business activity. Although there are ethnic concentrations they are small outside of London and Liverpool. Housing is therefore desegregated with substantial spatial distribution - likely to continue. |
| **Pakistani and Bangladeshi** | Low levels of educational attainment on par with Caribbean and white working class boys. Low levels of economic activity and high levels of unemployment particularly for women. Low wage rates, location in the most vulnerable sectors of the economy. Limited opportunities for desegregation partly by choice (desire to remain within community and close to ethnic facilities) and in part due to economic position – rather greater intensification to continue causing greater levels of overcrowding in low value housing. Location to remain in current areas with some spread into adjacent core locations causing some community tension arising out of competition. Possibility of some movement from existing Birmingham areas into terrace housing in core Black Country. Social housing not an option as social sector continues to decline. Low potential for social, economic and residential integration. |
### Caribbean

Likely to remain disproportionately in the social sector and the poor end of the private. Greater degree of desegregation than the Muslim community but still located within the core central areas of Black Country in poor housing. Likely to benefit from the decent homes strategy. Low wages, high rates of unemployment, low educational attainment by boys will mean aspirational and higher value housing will not be an option. Higher participation rates by Caribbean women may have some impact.

| New Migrants Europe | Will move into the traditional settlements vacated by more successful earlier migrants. Will buttress the housing areas vulnerable to market failure. Will fulfil roles in the labour market unacceptable to the rest of population. |

| Poor White          | Low educational attainment particularly for boys. High levels of unemployment and low level of economic participation. Where in employment they tend to be in the low skilled sectors. Will remain in the central core of the Black Country in poor, deprived social and private sector housing areas. Likely to be in competition for accommodation with other deprived communities. Very little opportunity for desegregation from existing concentrations. Will benefit from decent homes strategy. |

D6.14 If these trends are not responded to, with the capture of the potential of these communities, then the Vision for the future Black Country will be prejudiced. Failure to respond to these trends is unacceptable. There are serious community relations implications for Muslim and Caribbean communities in particular. Population growth in the Muslim community in Birmingham and the Black Country is putting pressure on existing community areas to expand and that is likely to create direct competition for housing and community resources in areas currently occupied by Caribbean communities. There is a potential on the basis of current trends for existing community tensions to increase. Similar tensions are also likely to arise from increased competition for housing in the central core of the Black Country. Future policy making must be conscious of these challenges and seek solutions.

**MAKING IT HAPPEN – A COHESIVE COMMUNITY**

D6.15 Avoiding future ethnic segregation in the labour market, housing and education and the social sector cannot be left to market forces alone. Public agencies must address the factors which contribute to the social polarisation
of BME and poor white communities, including acknowledging that in the past public policy has contributed to that polarisation.

D6.16 In the Black Country the approach will be to:

- **Treat diversity as a major opportunity** to exploit to drive the achievement of a future knowledge society and economy aspired to in the Black Country Vision – to be reflected in all the action plans of the Growth Themes of the Black Country Strategy.

- **Promote Social Cohesion as a theme in its own right** with the creation of a specific workstream and action plan to develop such a society. This will require removing the barriers to equality and addressing structural inequalities.

- **Tackle Poverty as a theme in its own right** approaching this from the perspective of individual communities across the whole of the Black Country not just within BME communities.

D6.17 We will learn from Government thinking on these issues and apply them to the specific circumstances of the Black Country experience and the ambitious Vision. The Vision-led response will remain to respond to the twin national challenges of:

- **Creating equal opportunity** through dismantling barriers to equal access, levelling the playing field by tackling the structural inequalities in the fields of education, labour and housing markets, health, policing and the criminal justice system.

- **Creating community cohesion** through putting in place measures to encourage social conditions whereby all people feel able to come together and share a sense of inclusion and British identity defined by common opportunities and mutual expectations which includes valuing local cultures.

D6.18 The areas of greatest concern are to respond to creating equal opportunity, to ensure that ambitions are maintained for sustainable growth and competitiveness in the Black Country with a harmonious society: Education, the Labour Market, Health Inequality, and Housing. The **key equality issues** impacting on current and future Black Country performance in these areas include:

- **Education** – The need for a coherent strategy common across the whole Black Country responding to the underperformance in education of specific groups particularly African-Caribbean, Bangladeshi and Pakistani children and white working class boys from early years upwards. Education generally must be given a higher profile and strong identifiable leadership at Black Country level. Ensuring that BME communities secure equal access to training and its outcomes through customised programmes which meet employer needs while tackling issues of low skills, particularly language and numeracy skills in the 16 to 19 age
group. A particular issue is that, whilst participation rates remain high, Muslim children engage disproportionately in low level courses with limited vocational focus.

- **Labour Market** – There is significant diversity in the experience of ethnic groups with regard to the labour market – issues of key concern include: higher unemployment rates for the Caribbean population; higher inactivity rates for Pakistani and Bangladeshi communities; low wage levels and concentration in certain low value industries and activities of BME and migrant populations; lower representation of BMEs in the professional and managerial sectors. The labour market strategy for the Black Country will pick up the key areas of activity underpinning the work of the Government’s cross departmental Ethnic Minority Task Force, namely: Connecting People to Work; Human Capital (workforce skills); Equal Opportunities in the Workplace.

- **Health Inequality** – Responding to different needs and health experience of communities is integral to the health performance management framework. Targeted action in the Black Country to promote health equity will need to include: Heart disease within the Asian community; high smoking levels amongst Bangladeshi and Pakistani men; mental health issues within Afro-Caribbean communities; differential perception of and satisfaction with health services expressed by different ethnic groups.

- **Housing** – Access to housing is a major contributory factor to the emergence of parallel communities. Key issues regarding the widening of housing choice to meet the particular needs and aspirations of different groups has been set out above and in the Housing theme. A further issue regards the tendency in the past for those BME communities who have sought to meet their housing needs through the public sector to find themselves placed in the worst, most run down and least attractive public sector estates.

**PRIORITIES FOR ACTION**

D6.19 The Black Country seeks to develop greater understanding of issues of diversity and enhanced sensitivity of strategies and action programmes to understand the potential impact on these issues and positively contribute to ameliorate negative consequences and enhance positive outcomes.

D6.20 There are **four priorities for action** to take forward the agenda to promote a prosperous, diverse and harmonious society in the Black Country:

1. **Promote Social Cohesion as a theme in its own right** – To prepare a work stream around diversity and social cohesion which will develop a strategy defining actions to be taken to develop such a society. This will require removing the barriers to equality
and to address structural inequality. Stakeholder ownership will be secured (including local authorities, Local strategic partnerships and other agencies) and a detailed implementation plan devised.

2. **Tackle Poverty as a theme in its own right** as a Black Country not just a BME issue. To strengthen the approach to Poverty, underpinned by a separate work stream similar to that proposed for Social Cohesion.

3. **Work with Government**: Government is pro-active in this area – it has agreed a cross departmental strategy, with PSAs covering all Government departments with two strands: promoting social cohesion and good community relations; and eliminating discrimination. To seek a ‘partnership’ with Government to promote social cohesion in the Black Country. The Black Country Study provides the framework for piloting a sub-regional approach to social cohesion integrated with economic and environmental change. Through a partnership to share search for good practice to learn from, and establish joint monitoring and evaluation of change in Black Country and impact of policies.

4. **Adopting a Vision-led Process**. To bring together experts and political leaders within the Black Country and the Region to debate issues and potential responses. These debates will be modelled on the Black Country Study process. They will be informed by evidence and analysis of trends, community needs and aspirations, and what works. They will involve detailed examination of the Black Country Study strategic themes from the perspective of each diverse community group, leading to development of joint Black Country strategy and action plans to secure:

   a) Levelling the playing field, tackling structural inequality in the fields of education, housing, labour market, health, policing and the criminal justice system.

   b) Greater equality of opportunity for all through the dismantlement of the barriers to equal access.

   c) Putting in place measures which create social conditions bringing communities together, developing inclusion, common identity, active citizenship and promoting a common sense of belonging.
DEVELOPING AN INTEGRATED TRANSPORT NETWORK

BLACK COUNTRY TRANSPORT TODAY

D7.1 A key requirement of the Black Country Study is to establish the spatial principles of a transport network that will support the Vision for the future. The independent Panel conducting the examination in public in to the draft Regional Planning Guidance (now Regional Spatial Strategy) believed that transport was the single biggest challenge facing the Black Country.

D7.2 In 2001, the West Midlands Area Multi-Modal Study (WMAMMS) reported with its analysis of the transport problems in the West Midlands conurbation. This study became a key input to the West Midlands RSS, which was in preparation at that time. The WMAMMS concluded that to develop a strategy to tackle congestion and capacity constraints which impact on both regional and longer distance traffic, a strategy based on improvements to all the local transport networks, would be essential. These network improvements would need to be supported by a demand management strategy, including road pricing and a vigorous hearts and minds campaign to persuade people to use their cars less. The study’s findings influenced the content of the Regional Transport Strategy (RTS) and several of the RTS main transport proposals appeared in the final draft of policy T12 Regional Transport Priorities.¹ The Local Transport Plan (LTP) 2006-2011, implements within the sub-region the broad strategy of the previous studies. It is this strategy that has to expand and extend to meet the challenges of the Black Country Vision.

D7.3 The Black Country has established strategic road, rail and air links to the national and international markets. Frequent passenger rail services run to London and other UK cities via two inter-city rail stations Wolverhampton and Sandwell & Dudley. The area is positioned at one of the major crossroads of Britain’s motorway network, astride the M5 and M6. By air, Birmingham International Airport serves the Black Country with scheduled and charter services to over 40 European destinations and daily flights to the United States and Asian destinations.

D7.4 In terms of raw connectivity, the Black Country has all the components to be an internationally competitive sub-region. Despite these strategic links, economic growth is being constrained by congestion problems at key motorway junctions, on trunk roads and around centres. Some of the worst affected areas are: Junction 8 where M6 traffic heading North merges with the M5; Junctions 1 and 2 on the M5 and 9 and 10 on the M6 and routes around these. Other trunk roads suffering congestion at peak times include: routes linking the M6 toll to the M54, Wolverhampton ring road, routes around Merry Hill, Dudley Southern bypass and Walsall town

¹ RSS T12 reproduced in appendix 1
centre ring road. Knowledge of the transport and travel patterns and related problems in the Black Country are based on a long record of monitoring and analysis from the Multi-Modal transport studies WMAMMS. Latterly results from the PRISM\(^2\) transport model and accessibility planning show that the Black Country suffers from:

- Inadequate facilities for walking and cycling.
- Unreliable, expensive and often overcrowded public transport.
- Lack of a high standard public transport system.
- Lack of good public transport information.
- Lack of capacity at Birmingham New Street and on the Wolverhampton to Coventry section of the West Coast mainline.
- Congestion and safety problems arising from car dependency.
- Severe congestion on the motorway network.
- Inefficient use of existing road space.
- High cost of transport due to road congestion.
- Poor transport network in the West of the conurbation.
- Congestion and access problems in growth areas such as the Birmingham International Airport/NEC complex.

D7.5 The PRISM transport model supported by the seven West Midlands Authorities has been developed by a consortium of transport planning consultants and is supported by the Highways Agency. It has been used to provide information about where problems will occur on the transport network in the future and what impacts different land use patterns will have on the ways in which people move around. It is the agreed Strategic Transport Model for the Metropolitan Area and is being used for all of the strategic modelling within this area including the Local Transport Plan. The work done by the PRISM team to support the development of future transport for the Black Country is available on the Consortium’s website.

D7.6 There is a strong demand for travel regionally nationally and internationally. On the average day over 2m trips are made within the Black Country boundaries, many of those starting or ending in places outside of the area. These trips are vital to the Black Country economy. There is strong demand for travel on a north/south axis through the Black Country. The M5 and M6 motorways meet this demand to a degree but short distance trips on these routes influence their role as nationally strategic corridors.

\(^2\) PRISM was developed on behalf of the seven Metropolitan Authorities by Motts Macdonald in partnership with RAND Europe
D7.7 Of the 2 million trips\(^3\) (not including walking and cycling) that are made every day in the Black Country, 83% are by car and only 17% by public transport. Even with population forecast to decline over the next 30 years, our transport model shows that there would still be a rise in the number of trips made daily. Of these new trips, the trend is for more and more to be made by car and fewer by public transport. Clearly, given the planned expansion of employment, population and housing, this trend is unsustainable. Overall public transport use is declining in the Black Country whilst rail use is increasing. This is in line with national trends outside of London, which with a different regulatory system has seen an increase in bus use. Bus operators in the West Midlands have reported over thirty locations where delays on the road network are unacceptably high and seriously affects reliability. There are still some bridges in the Black Country with limited headroom or that cannot carry the largest heavy goods vehicles. This is a restriction on freight operations and hampers the development of some sites.

D7.8 Currently, the poor quality and unreliability of public transport within the Black Country means that for many people, there are few alternatives to car use. As land uses have become more decentralised, more people are forced to use cars to gain access to jobs and services rather than walking and cycling, adding to congestion and pollution. Those who cannot afford a car or who cannot drive may suffer from social exclusion. Car ownership in the Black Country is lower than the national average with between 25-37% of households not having access to a car.

D7.9 Of those public transport trips that are made, the majority are by bus. The quality, performance and perception of these services means that they fail to truly provide an acceptable alternative to car use. Each LTP area has been required by the Government to assess the accessibility of key services in their areas including access to work, education, healthcare and fresh food. Whilst accessibility to such services in the Black Country are good there are a number of gaps in the commercial network and a particular problem with evening services reaching educational and recreational opportunities, and reaching some new areas of employment that are not located in centres.

D7.10 Midland Metro, the first line of a proposed network of Light Rail routes, opened in 1999, is a light rail tram system running from Birmingham to Wolverhampton via West Bromwich and Wednesbury. This modern tram system provides a reliable and convenient transport link between the two cities over a distance of 21 km. The system is owned and promoted by the public transport body Centro, and operated through a concession by ‘Travel Midland Metro’.

D7.11 Rail usage in the West Midlands is growing more rapidly than nationally. While this is encouraging, many routes through the Black Country are

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3 A trip is defined as one single journey so a number of trips may occur concurrently, e.g. from home to school to work.
becoming congested. The improved and new services promoted in the £4.6bn package by WMAMMS is not in sympathy with Network Rail/DfT view that rail is to move people to and from large cities quickly. Centro’s pragmatic approach is to lengthen platforms and trains to get more people into Birmingham but with the same frequency of service. Notably, the main rail route out to Birmingham New Street and Birmingham International is nearing capacity and represents a significant barrier to increasing both the number of services on this route and the reliability of existing and future services. The recently published West Midlands Route Utilisation Strategy focuses on long distance travellers, to achieve an increase in capacity. This strategy does not necessarily support the economic regeneration of the Black Country.

D7.12 There are parts of the Black Country with opportunities for enhancing the rail service, either through improved performance or the potential to open up former lines for passenger services, such opportunities should be safeguarded where possible in order to provide future opportunities to develop the transport networks. The future of such routes should be considered together with partners in the City Region to develop a network of rail services that contributes to the West Midlands economy.

THE SCALE OF AMBITIONS

D7.13 The key role of transport in providing a catalyst for the urban renaissance of the Black Country was acknowledged at the beginning of the Black Country Study. Technical work carried out to examine the problems in the Black Country has supported the importance of the role of transport and the contribution that transport investment will make to bridging the £2.6bn productivity gap and ensuring that the Black Country contributes fully to the regional and national economy. Good access to key destinations is vital to the future of the Black Country to reverse the outward migration of population and to support economic and social aspirations.

D7.14 As identified in the RSS, urban renaissance requires an integrated approach, where the creation of jobs and the creation of modern transport networks are vital and have to be planned funded and implemented in a seamless and co-ordinated way. Transport also has a key role to play in improving the environment in the Black Country and can help promote healthy lifestyles encouraging walking and cycling. Improved transport networks are fundamental to urban renaissance. The changes proposed to the West Midlands RSS act as a basis to develop further necessary transport interventions to be developed to support the renaissance of the Black Country, namely:

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4 ODPM, (2004), Regional Spatial Strategy for the West Midlands (RPG11), HMSO
West Midlands Regional Spatial Strategy Paragraph 4.3

Fundamental to urban renaissance is the creation and marketing of sustainable urban communities in which people will choose to live, work and invest. This will be achieved within the MUAs (major urban areas of which the Black Country is one) through the creation of:

- A variety of high quality, healthy, affordable and sustainable living and working environments (QE3, QE4);
- A sufficient number and variety of jobs to meet employment needs, along with associated education and training opportunities (PA1);
- Modern urban transport networks with an emphasis on public transport provision (T1); and
- Rejuvenated city, town and local centres to serve communities with high quality services, to promote identity and social cohesion and to drive economic change (PA11).5

D7.15 Those in business recognise and value the contribution of transport to all levels of the UK economy pointing out that it is often at the regional and sub-regional level that those links are most apparent by:

- Facilitating access to domestic markets;
- Enabling access to international markets;
- Facilitating inward investment;
- Boosting regional economic performance;
- Supporting business operations and efficiency;
- Supporting labour mobility/ widening labour markets;
- Enabling agglomeration;
- Supporting high productivity sectors facilitating development regeneration;
- Supporting other objectives eg housing development’.6

5 As above

6 Confederation of British Industry (2005) CBI response to Eddington Study
D7.16 There are growing concerns across the area that the shortfall in transport investment will progressively and adversely affect the growth and productivity of the Black Country. Local Business Chambers have identified that:

“What Black Country business wants is a transport infrastructure that provides easy access to and from the region”.7

D7.17 Whilst the Government is committed to increasing transport investment it has been estimated that this is unlikely to stem traffic congestion, which is already much worse and more costly to business than in most other countries.8

D7.18 The Sustainability Appraisal (SA)9 integrated into the development of the Black Country Study (including the development of the proposed revision to the transport policies in the RSS) has influenced the development of the Black Country Preferred Transport Strategy. This is important to ensure that a transport strategy is developed which contributes positively to the future environment of the Black Country.

D7.19 It is increasingly acknowledged that a lack of transport investment can create an infrastructure bottleneck, and that improving local transport is a key issue. Creating an efficient transport system is key to delivering the Vision for the Black Country, and particularly ambitions for economic growth. A transport network is needed which enables the free flow of goods, services and people within the Black Country and to wider national and international destinations. Through a series of Visioning events with key stakeholders in the sub-region from the public private and voluntary sector across a whole range of interests, a Shared Transport Statement of Black Country transport aspirations was developed (see Appendix D2).

D7.20 The proposed transport strategy was guided in it’s development by a Working Group with a wide membership made up of the BC Authorities, the Highways Agency, the Regional Assembly, Government Office West Midlands, and representatives from the private sector and Advantage West Midlands.

D7.21 In 2004 the Long Term Economic and Employment Strategy for the Black Country recommended that the economic strategy for the Black Country should be based upon a number of principles one of these being to 'B-connected working with education and training organisations and promoting social interaction to accelerate acquisition of knowledge; and improving connectivity.10

7 Munroe G (2005)
8 OCED, (2004), Economic Survey of the United Kingdom,
D7.22 The Strategic Centres in the Black Country were evaluated in early studies to establish their role in the long-term economic future of the Black Country. A key role for the four centres of Wolverhampton, Walsall, West Bromwich and Brierley Hill emerged from the Centres technical work and this was a role that had to be supported by improvements in transport infrastructure:

**Black Country Centres Study:**

- 'At Brierley Hill accessibility improvements and better modal split are a key condition for growth.
- 'In parallel with this process the development of an effective Centres Strategy requires a detailed assessment of transport needed to support the existing and expanded population and economic base of the Black Country, and to support the scale of expansion of the strategic and non-strategic centres required under the growth scenario'.

D7.23 In June 2005 GVA Grimley\(^\text{12}\) completed a report examining the capacity for employment land in the Black Country. The assessment of the quality of such land was an important part of the study once the baseline of available land had been established. Using guidance from the Office of the Deputy Prime Minister (ODPM) a list of indicators was established for the assessment of employment land and employment areas. For transport accessibility to employment land the criteria were:

<table>
<thead>
<tr>
<th>Access to Motorway Junction/Strategic Route For B1a/B1b/B1c/B2/B8 use and Employment Areas:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 5 minutes</td>
</tr>
<tr>
<td>5 - 10 minutes</td>
</tr>
<tr>
<td>15 - 20 minutes</td>
</tr>
<tr>
<td>20+ minutes</td>
</tr>
</tbody>
</table>


D7.24 These criteria were then used to assess all Regional Employment Land Survey (RELS) sites and all employment areas. The analysis showed that
for the Black Country the majority of sites were assessed as being average (against a range of criteria including transport) for each Black Country Authority, accessibility influenced the quality of their sites.

D7.25 Within the framework set by the Black Country Local Authorities, private sector partners, Visioning Events, public consultation and Sustainability Appraisal, **Transport Objectives** have been developed to address the challenges ahead:

1. To seek solutions that reflect the aspirations of the Black Country Shared Transport Statement and the Vision.
2. To ensure a seamless integration of land-use and transport planning through the Black Country Study and to demonstrate the strong interdependency of future land-use decisions and adequate servicing by a variety of travel modes.
3. To facilitate urban renaissance of the Black Country and in so doing, contribute to the environmental uplift of the area as a place in which to work, live and play.
4. To provide the sub-region with an efficient and effective transport system to create choice of mode and travel costs to the user, to reflect the unique character of the area.
5. To support sub-regional economic regeneration, notably in Regeneration Priority Areas, providing a choice of fast and efficient transport systems which aid competitiveness and access to and for the necessary labour force in future, particularly by means of public transport.
6. To provide a transport network that reflects key sustainability objectives identified by the SA consultants.

D7.26 The Black Country now has a set of priorities within which the Transport Strategy that can be developed:

- Priorities for Development of Black Country Transport Strategy.
- Connecting up our four strategic centres with public transport that has undergone a step change in quality to create a polycentric network of centres where there is a real alternative to the motorcar.
- Providing communities with access to employment, leisure, education and health opportunities again focusing on public transport improvements.
• Delivering a quality bus network using Quality Bus Contracts.

• Facilitating access quality employment land with reliable access for freight to the national motorway network (within 5-10 minutes) where possible.

• Accelerating growth of knowledge industries within identified corridors by public transport, improvements to the road network with accessibility to and for knowledge workers; and improving access for more of the Black Country to Birmingham International Airport.

D7.27 In addition, ways of reducing the need to travel to work, for example by increasing the number of people working from home, will be investigated.

D7.28 The environmental and health impacts of failing to reduce car use and congestion have been highlighted by the Sustainability Appraisal. There are currently problems with air pollution along routes of the motorway network that pass through the Black Country. Traffic generally in the Black Country is also a major source of carbon emissions.

D7.29 The Local Transport Plan (LTP) 2006-11 has proposed a package of highway and public transport schemes to tackle existing and emerging transport problems in the West Midlands. Whilst these planned improvements will enhance the Black Country transport network, they are only a part of a five year programme which predominantly respond to existing economic conditions and land use patterns. They will not achieve the radical transformation outlined in the 30-year vision. Most importantly, they will not sufficiently strengthen the position of the four centres or create more quality employment land to deliver growth of the Black Country economy. In order to do so, a number of other schemes need to be considered.

**DEVELOPING A TRANSPORT STRATEGY**

D7.30 A unique feature of the Black Country Study is the integration of land use and transport. The development of preferred land use options has been integrated with the development of a Preferred Transport Strategy. The availability of a strategic transport model has been very important in this process. In the first phases of the Black Country Study a large number of spatial options were assessed against the existing and planned transport networks in the Black Country. The impact of various options for the future spatial land use strategy for the Black Country were evaluated using the PRISM transport model. The first phase of this work is described in Prism: Black Country Study by the Prism Joint Application Team in September 2005. This work identified the:
• Importance of locating activities, employment and retail opportunities in locations accessible by a range of public transport modes;
• The strength of underlying travel trends and their influence on the way that people travel;
• The importance of the location of retail activity as an attractor of trips;
• The need to provide attractive public transport links between new housing areas and strategic centres (if these centres are to develop as is required);
• The need to provide new and improved road links to the emerging areas of likely future employment;

D7.31 The first phase of PRISM work considered the effects of different Potential Directions of Change (land use strategy) on the existing and planned/proposed transport networks in the Black Country 9. Following the public consultation on the Potential Directions of Change a Preferred Land Use Strategy has been developed. The effect of the Preferred Strategy on the transport networks; existing; planned to 2011 and 2021 in the Black Country has evaluated 10. This work identified a number of challenges that had to be addressed in any Transport Strategy:

• Access to Strategic Centres had to be improved by road and public transport
• Access to Employment Land Investment Corridors had to be improved, (or provided) to improve journey times for goods and employees by both public and private transport

D7.32 A Black Country transport network has now been developed to meet these challenges. The Prism transport model has been used to evaluate the proposed transport changes, table D7.38, against the preferred land use strategy. A full technical report describing the results of this work will be available from the Black Country Study Team and on the Black Country Consortium website11.

The transport interventions described in D7.38 represent an integrated strategy to address the challenges that have been identified. The proposed strategy when examined as a whole indicates that we have a robust strategy with:

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10 Prism: Black Country Study by the Prism Joint Application Team in May 2006.
11 Prism: Black Country Study by the Prism Joint Application Team in May 2006.
• An appropriate range of transport interventions;
• Key problem areas are targeted and improved by implementing these interventions;
• Midland Metro is a key part of the overall strategy and a vital part of the public transport strategy;
• Improvements to motorway junctions influence the local road networks;
• Further interventions may be needed to accommodate any future amendments to the Preferred Land Use Strategy;
• There is a need to test this strategy against any emerging Tif proposals for the West Midlands;

**MAKING IT HAPPEN: THE BLACK COUNTRY TRANSPORT STRATEGY**

D7.33 The proposed Black Country Transport Strategy supports the Vision for the Black Country and the preferred land use strategy and will be subject to continuing technical work as part of the ongoing strategy process. The Transport Strategy has **four strands**:  

- First, it focuses on developing a **culture in communities and businesses that chooses smart transport choices** to travel and to do business contributing to the future environment and economy of the Black Country and that these choices are supported by changes to support walking and cycling, protecting key transport routes, managing demand and making the best use of existing resources.
- Secondly it focuses on a new more **integrated public transport system (the ‘Black Country Express’)** as part of Network West Midlands.
- Thirdly, it identifies the priority transport interventions often **highway/junction improvements to unlock economic and housing growth potential and makes best use of highway networks by red routing and enhanced traffic control**.
- Fourthly, it highlights the investments needed to improve our **external connectivity**, a prerequisite for economic growth and competitiveness. Some of the proposals have already been identified in the Local Transport Plan (LTP), others need to be given early commitment.

D7.34 **Map D7.1** outlines the existing transport network (passenger, rail lines, Metro, motorway and primary roads) serving the Black Country, set
against the key spatial components of the Black Country economic strategy, namely the focus of investment on four Strategic Centres and four Key Employment Land Investment Corridors.

D7.35 Map D7.2 shows the Major Schemes proposed in the West Midlands Local Transport Plan (2006-2011) to enhance the existing network, notably enhancements to existing rail corridors, additional Metro line to Brierley Hill, and a package of highway and public transport schemes to improve accessibility.

D7.36 A key proposal of the Black Country Transport Strategy is the Black Country Express' part of the development of Network West Midlands. This will revolutionise the way people view public transport, knitting together Metro, heavy rail and bus networks to provide a seamless transport system. By offering greater choice and quality of public transport, more people are likely to make the shift away from car use, for example, many users consider Metro more appealing than bus.

D7.37 Maps D7.3 and D7.4 show the proposed development of this network to 2021 and 2031 to serve the population and economic growth of the Black Country and to support sustainable development. Proposals for primary high volume rail, Metro and bus transport corridors will support the Black Country Express. The hubs of public transport network will be our strategic centres, where transport interchanges will provide routes out to smaller town centres in the Black Country, major employment sites and residential areas. Each strategic centre will have a direct rail or coach service to London and Birmingham International Airport. Timetables and ticketing will be integrated across networks and operators.

D7.38 These maps also present the relationship of the transport network proposals to the potential housing growth corridors as well as the employment growth locations.

D7.39 Key components of the proposed network are:

- Black Countrywide Metro System - offering reliable and frequent links between the Black Country’s four strategic and other local centres, as well as a link to Birmingham city centre. Fully accessible and stopping more frequently than rail, Metro will provide for many their first choice for public transport, avoiding problems of congestion and linking new housing to employment areas.

- Rail Network - providing more reliable strategic services to Birmingham, Birmingham International, Coventry and other national destinations; and local services across the Black Country’s town centres.
• High Quality Bus Services – creating a vital link from local neighbourhoods bus stops to the town centres and to the regional and national networks. Vehicles will be of high quality, and tickets will enable passengers to travel across the region using buses, trains and trams. Fast, frequent and reliable services will operate on all main routes supplemented by a network of feeder services to improve accessibility to people’s homes. All routes will be part of a quality improvement scheme to offer safer, more comfortable buses and shelters, as well as superior information about timetables and routes.

• National Coach Services – providing low priced, fast and frequent service to Birmingham International Airport, London and other major cites from all of the key centres in the Black Country.
Map D7.1 Black Country Study: Existing Transport Networks

- Primary Road
- Public Transport
- Rail
- Existing
- Passenger Rail
- Bus Routes
- Urban Areas
- Potential Corridor for Housing Growth

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Proposed Major Schemes

<table>
<thead>
<tr>
<th>Black Country Preferred Land Use Networks</th>
<th>Proposed Major Schemes</th>
<th>Transport Schemes by Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Land Use Networks</td>
<td>Metro Extension</td>
<td>Highways and Public Transport</td>
</tr>
<tr>
<td>Strategic Centre</td>
<td>Enhanced Rail Corridor</td>
<td>Highways</td>
</tr>
<tr>
<td>Corridor for Housing Growth</td>
<td></td>
<td>Public Transport</td>
</tr>
</tbody>
</table>

© Dixon Copyright. All rights reserved (Walsall Council) (2006010520) (2006)
Map D7.3 Black Country Study Preferred Transport Networks 2021

- Primary Roads
- Metro Existing
- Passenger Railway
- Urban Areas
- Tourism Centre
- Black Country Preferred Land Use Network

Black Country Observatory

See it in colour

© Grimm Copyright. All rights reserved (Walsall Council) (2000010520) (2006)
D7.40 The following Table D7.1 summarises the changes needed to the Black Country transport networks in terms of providing quality accessibility to each of the Black Country’s Strategic Centres, proposed Key Employment Land Investment Corridors and other potential growth corridors.

The Transport network changes to 2031 are set out in terms of:

- Proposals within the existing Local Transport Plan Package 2006 – 2011.
- Additional Black Country Network enhancements to 2031.

D7.41 Table D7.1 Black Country Transport Strategy – Strategic Centres

<table>
<thead>
<tr>
<th>Wolverhampton City Centre Access Package</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local Transport Plan Package 2006 – 2011:</strong></td>
</tr>
<tr>
<td>- Programme of measures aimed at achieving behavioural change including travel awareness, demand management, walking /cycling.</td>
</tr>
<tr>
<td>- Wolverhampton Rail Station.</td>
</tr>
<tr>
<td>- Wolverhampton Bus Station re-development.</td>
</tr>
<tr>
<td>- Bus showcase.</td>
</tr>
<tr>
<td>- Quality Bus Network.</td>
</tr>
<tr>
<td>- Urban Traffic Control.</td>
</tr>
<tr>
<td>- Red Routes.</td>
</tr>
<tr>
<td><strong>Black Country Network Enhancements to 2021/2031:</strong></td>
</tr>
<tr>
<td>- Continuing and enhanced programme of measures to focus on achieving behavioural change including travel awareness, demand management parking regime, further measures based on the existence of a national scheme for road user charging, walking /cycling, travel planning.</td>
</tr>
<tr>
<td>- Quality Bus Network on all main bus routes in Wolverhampton.</td>
</tr>
<tr>
<td>- Network management measures including urban traffic control and Red Routes.</td>
</tr>
<tr>
<td>- Improvements to A449 Stafford road including works to facilitate the expansion of Wolverhampton City Centre.</td>
</tr>
<tr>
<td>- A4123 corridor improvement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>West Bromwich Town Centre Access Package</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local Transport Plan Package 2006 – 2011:</strong></td>
</tr>
<tr>
<td>- Programme of measures aimed at achieving behavioural change including travel awareness, demand management, walking /cycling</td>
</tr>
<tr>
<td>- Bus Showcase</td>
</tr>
<tr>
<td>- West Bromwich A41 Expressway/A461 junction improvement</td>
</tr>
<tr>
<td>- Quality Bus networks</td>
</tr>
<tr>
<td>- Bus Showcase</td>
</tr>
<tr>
<td>- Urban Traffic Control</td>
</tr>
<tr>
<td>- Red Routes</td>
</tr>
<tr>
<td><strong>Black Country Network Enhancements to 2021/2031:</strong></td>
</tr>
<tr>
<td>- Continuing and enhanced programme of measures to focus on achieving behavioural change including travel awareness, demand management parking regime, further measures based on the existence of a national scheme for road user charging, walking /cycling, travel planning.</td>
</tr>
<tr>
<td>- Quality Bus network on all major bus routes.</td>
</tr>
<tr>
<td>- Network management including urban traffic control and Red Routes.</td>
</tr>
<tr>
<td>- Highway improvements to West Bromwich town centre.</td>
</tr>
</tbody>
</table>
• Improvements to junction 1 M5.

Brierley Hill/Merry Hill Access Package

Local Transport Plan Package 2006 – 2011:
- Programme of measures aimed at achieving behavioural change including travel awareness, demand management, walking/cycling.
- Midland Metro: Wednesbury to Brierley Hill.
- Brierley Hill Sustainable Access Network.
- Rail Showcase II: Snow Hill Lines.
- Burnt Tree Island Junction Improvement.
- Urban Traffic Control.
- Red Routes.
- Bus Showcase.

Black Country Network Enhancements to 2021/2031:
- Continuing an enhanced programme of measures to focus on achieving behavioural change including travel awareness, demand management parking regime, further measures based on the existence of a national scheme for road user charging, walking/cycling, travel planning.
- Quality Bus network focused on Brierley Hill.
- Halesowen to Brierley Hill high volume public transport corridor.
- Corridor improvements on the A4123 and A4101.

Walsall Town Centre Access Package

Local Transport Plan Package 2006 – 2011:
- Programme of measures aimed at achieving behavioural change including travel awareness, demand management, walking/cycling.
- Walsall Town Transport package.
- Walsall Bradford Place bus station.
- Bus Showcase.
- Urban Traffic Control.
- Red Routes.
- Rail Showcase 1: Cannock Lines.
- Rail Showcase: Walsall Lines.

Black Country Network Enhancements to 2021/2031:
- Continuing and enhanced programme of measures to focus on achieving behavioural change including travel awareness, demand management parking regime, further measures based on the existence of a national scheme for road user charging, walking/cycling, travel planning.
- Midland Metro: Wolverhampton-Walsall-Wednesbury and Walsall-Scott Arms to join Varsity Route.
- Quality Bus Network.
- High Volume Public Transport Corridors to Brownhills.
- Time table improvements for rail services to Birmingham.

D7.42 Table D7.2 Black Country Transport Strategy – Key Employment Land Investment Corridors

Black Country North (Wolverhampton–Stafford Road Corridor)

Local Transport Plan Package 2006 - 2011:
- M54 junction 2 site access to I54.

Black Country Network Enhancements in 2021 -2031:
- Continuing and enhanced programme of measures to focus on achieving behavioural change including travel awareness, demand management parking regime, further measures based on the existence of a national scheme for road user charging, walking/cycling, travel planning.
**D7.43 Table Black Country Transport Strategy – Other Growth Corridors**

- **Walsall – Aldridge Corridor**

  *Local Transport Plan Package 2006-2011:*
  - Brownhills Transport Package

  *Black Country Network Enhancements to 2021/2031:*
  - Quality Bus Network.
  - High volume public transport corridors.

- **Black Country Central (Walsall - Darlaston - Neachells – Wednesbury Corridor)**

  *Local Transport Plan Package 2006 – 2011:*
  - Darlaston SDA
  - M6 junction 10
  - A461 Burnt Tree Island to Black Country New Road Red Routes

  *Black Country Network Enhancements to 2021 / 2031:*
  - Neachells/Wednesfield Way Access Improvements
  - M6/M5 Active Traffic Management

- **Black Country West (Pensnett - Brierley Hill - Dudley – Dudley Port Employment Corridor)**

  *Black Country Network Enhancements to 2021 / 2031:*
  - Birchley Island/ Junction 2 M5 improvement
  - A4101 / A4123 corridor improvements
  - A461 Burnt Tree Island to Black Country New Road improvements

- **Black Country East (Oldbury - West Bromwich (Jcts 1-2 M5))**

  *Black Country Transport Networks Enhancements to 2021/ 2031:*
  - ATM junctions 1-2 of M5.
  - Birchley Island/Junction 2 M5 improvement.

- **D7.44** The following is a brief description of the proposed transport interventions in table D7.1. The proposed Black Country Strategy is an integrated strategy within which packages of interventions are proposed which will meet the objectives described in D7.25. The Black Country approach is an integrated approach to land use and transport.

- **D7.45** Two key areas of transport demand have to be addressed to meet the challenges of the Black Country preferred land use option access to the four strategic centres, and access to Employment Land Investment Corridors. Such access has been considered within the context of the need to improve and maintain links regionally nationally and internationally. The Black Country Transport Strategy is designed as an
integrated package and failure to deliver certain of the key elements will have a disproportionate impact on the strategy as a whole.

D7.46 The transport interventions outlined above and described in the following paragraphs will be developed to fundable schemes with public and private partners. The evaluation and funding will take place within the context of one Core Strategy for the Black Country, Local Development Frameworks, Local Transport Plans and Regional Prioritisation and national funding decisions. The development of each intervention will be appraised and monitored to ensure that it will continue to make a contribution to the realisation of the Black Country Vision.

Centre access packages

D7.47 Centre Access Packages are proposed for Wolverhampton, Walsall, West Bromwich and Brierley Hill. Each Package has common elements. First a focus on measures to change the opportunities for people to access the strategic centres and the interventions to help them make sustainable travel choices. Secondly a focus on public transport with priority being placed upon the development of Midland Metro linking together each of the 4 strategic centres and providing access for households in the proposed housing corridors to those centres. Interventions will be made to make the best use of the existing public transport network, both bus and rail including timetable enhancements, longer trains and longer platforms, new stations (where there is a demonstrate-able need) and new capacity. Thirdly a Quality Bus Network to provide a high quality links between housing employment areas and strategic and local centres, and providing opportunities for interchange between bus and metro bus and rail. In certain key areas, transport interventions identified as High Volume Public Transport Corridors on maps D7.1-7.4 will be considered for additional capacity where required as the 30 year Vision is developed, a range of opportunities to achieve this will be evaluated. Fourthly interventions to make the best use of the existing road network through better junction and signal design, and traffic management and demand management. Fifthly an increase in road capacity in certain areas where it has been estimated that present day capacity will be exceeded in the future and new roads to access specific sites (to be identified) within Employment Land Investment Corridors.

D7.48 Metro Lines -Wolverhampton-Wednesfield-Walsall, Walsall to Wednesbury and Wednesbury to Brierley Hill

The building of light rail lines from Wolverhampton via Wednesfield to Walsall, Walsall to Wednesbury and Wednesbury to Brierley Hill will enlarge the Metro network providing a high frequency, high capacity service with accessible stops between the Black Country’s strategic centres where significant growth in employment, and housing will occur. These routes will serve the Walsall Regeneration Area and Sandwell Regeneration Area and the proposed housing corridors B1-B4 and and through interchange between bus/rail and metro the proposed housing
corridors of A1-3 and C1-6 (see map D7.4). Also provide access to job opportunities to all of the Employment Land Investment Corridors either directly or through interchange with bus. These further metro lines will provide a high quality link between local centres and opportunities in the strategic centres as well and through interchange between bus, rail to existing housing areas. The further metro route will be a high quality investment in public transport that will be attractive to car drivers and improve the image of the area. These extensions will attract car users and whilst they will provide a significant increase in public transport capacity they will also support behavioural change particularly on trips to the four strategic centres and into Birmingham City Centre. The transfer of trips to metro will lead to an improvement in air quality along the route and will if trends are to be continued lead to a reduction in road accidents.

D7.49 **Wolverhampton town centres access package**

The package of measures in table D7.1 will support:

- New employment.
- A new retail offer.
- Cultural and social activities.
- Employment land corridor Black Country North.

In addition to the interventions outlined Table D7.1 further interventions are proposed that will improve access to Wolverhampton city centre and facilitate the expansion of the centre.

D7.50 **Stafford road corridor improvement including works to facilitate the expansion of Wolverhampton City Centre**

In the Black Country preferred land use strategy it is proposed that Stafford road will become a focus for housing and employment growth. In order to provide access to these employment opportunities and to the city centre it has been identified that this corridor could benefit from a series of improvements to facilitate bus access, reduce congestion, improve journey times, improve air quality and reduce accidents. These could include junction improvements, traffic management, increased capacity and consideration of ways to allow the further expansion of Wolverhampton City Centre whilst maintaining access and improving air quality and road safety.

D7.51 **A4123 Corridor Improvement**

The A4123 corridor is an important access from the south to Wolverhampton City Centre. It acts as a route for freight from within the Black Country to the M5 in the South and the M54 and onwards to the M6/M6 toll to the North of Wolverhampton. Such traffic does not always have to access Wolverhampton City centre and on the approach to Wolverhampton Ring Road the A4123 narrows and passes through the
ABCD New Deal for Communities area of All Saints, Blakenhall and Parkfield. Traffic experiences congestion on this route and air quality and safety suffers from the volumes and types of traffic using the route. The proposed interventions for this route could include junction and signal improvements, increased capacity where required and traffic management and road safety schemes.

D7.52 **West Bromwich Town Centre Access**

The town centre access package for West Bromwich is described in Table 7.1 will support:

- New employment.
- A new retail offer.
- Cultural and social activities.
- Sandwell Regenco.
- Employment Land Corridors Black Country Central.

In addition to the interventions outlined already interventions are to be developed that will improve capacity of the road network in West Bromwich in order to enable development to take place. The nature of the eventual package will be subject to development proposal, the emerging area action plan and further technical work and is expected to include:

- Highway improvements to West Bromwich town centre.
- Improvements to junction 1 M5.

D7.53 **Improvements to junction 1 M5**

The Study has identified a need for changes to be made to junction 1 on the M5 to improve the flow of traffic in and around this important junction. This will improve access to West Bromwich town centre and for users of roads around the junction travelling towards Birmingham, Oldbury, the Black Country route and onto the motorway network. Any interventions will be targeted at supporting the rejuvenation of West Bromwich town centre, improving road safety and air quality and improving the reliability of bus services.

D7.54 **Brierley Hill Access Package**

The RSS review proposes that Brierley Hill will become a Startegic Centre. In order to support the development of Brierley Hill a town centre access package is required that will improve the capacity of the public transport network, encourage sustainable travel choices and provide links to the proposed housing corridors and existing housing areas. The town centre access package for Brierley Hill will support:
• New employment.
• A new retail offer.
• Cultural and social activities.
• Proposed housing corridors A2/B2/C4-6 to Brierley Hill.
• Employment Land Corridor, Black Country West.

In addition to an extension of Midland Metro to Brierley Hill and quality bus networks and future high volume public transport corridors to serve Brierley Hill a number of specific interventions will also be required:

• Parking management at Merry Hill.
• Corridor improvements to A4123 and A4101.

D7.56 Parking Management at Brierley Hill

To support the Black Country Vision for Brierley Hill a car parking management regime is proposed which includes the use of parking charges comparable to those in the Region’s network of centres.

D7.57 Corridor improvements to A4123 and A4101

These roads provide important access routes into the Borough of Dudley from the rest of the Black Country and from the motorway network. Congestion on these routes will impact negatively on the development of Brierley Hill as strategic centre and the future role of Dudley town centre. Interventions are proposed which will reduce congestion, improve public transport reliability improve air quality and reduce accidents.

D7.58 Walsall town centre access package

The town centre access package for Walsall town centre is described in Table 7.1 will support:

• New employment.
• A new retail offer.
• Cultural and social activities.
• Proposed housing corridors A3/C3/B3/B4/A4
• Walsall Regeneration area.
• Employment Land Corridor, Black Country Central.

In addition to the interventions outlined already changes are proposed that will improve capacity and attractiveness of public transport to Walsall town centre these are:

• Midland Metro extension from Walsall town centre to Scott Arms to join the Birmingham Varsity route.
• High volume public transport corridors to Brownhills.
• Timetable improvements for rail services to Birmingham.
D7.59 **Midland metro extension from Walsall to Scott Arms to Birmingham City Centre**

This proposal provides a Metro link from Walsall to join the proposed Metro route from Birmingham City Centre to the Scott Arms. High quality public transport access will be provided to new employment and households in Walsall town centre providing increased public transport capacity and increased opportunity for sustainable travel.

D7.60 **High volume Public transport corridor to Brownhills**

The proposed development of a housing corridor C3 extending north from Walsall centre to Brownhills will have to be supported by the development of a high volume public transport route. A number of options are available to meet this need and will be evaluated.

D7.61 **Timetable improvements for rail services to Birmingham**

The development proposed for the centre of Walsall needs the support of rail links into the national network. These have to be frequent and reliable to be attractive and to have sufficient capacity to meet future demand from the identified growth in households and jobs in the Black Country.

D7.62 **Employment Land Investment Corridors**

Four key Employment Land Investment Corridors have been identified as part of the Black Country Preferred Land use option, these are shown on Map D7.4. The need for people and goods to move into and out of these areas has been considered and the transport interventions outlined in Table 7.1 are proposed to meet the objectives in D7.25.

D7.63 **Black Country North (Wolverhampton - Stafford road corridor)**

Black Country North as can be seen on Map D7.4 is focused upon Stafford road and Wolverhampton City Centre. The interventions proposed are those described in D7. ???.

D7.64 **Black Country Central (Walsall-Darlaston-Neachells-Wednesbury corridor)**

Key Employment Land Investment Corridor on Map D7.3.

D7.65 **Neachells/Wednesfield Way Access Improvements**

These two routes have been identified as providing important links for the Employment Land Investment Corridor. Interventions here will seek to improve journey times reduce congestion, reduce junction delays, improve air quality and reduce accidents.
D7.66 **M5/ M6 Active Traffic Management**

The motorway network through the Black Country is a vital link to the rest of the Region, the rest of the UK and internationally. It also presents a number of problems with traffic entering and leaving the motorway adding to congestion on local roads. The M5 and M6 elevated in places through the Black Country is also a physical barrier and traffic travelling from the East to West of the Black Country experiences sometimes lengthy delays near motorway junctions. The flows of traffic on the motorways are affected by and in turn influence the progress of traffic leaving and joining the motorways. A way of controlling the flow on the motorway which aims to increase safety and reduce periods of standing traffic is being trialled on the M42 and it is proposed that an ATM system would contribute to improving conditions on the M5 and M6 through the Black Country, and that this should be progressed.

D7.67 **Black Country West (Pensnett-Brierley Hill-Dudley-Dudley Port)**

Key Employment Land Investment Corridor on Map D7.3.

D7.68 **Birchley Island junction2 / M5 improvement**

Traffic approaching Birchley island often experiences lengthy delays both within the peak periods and at other times during the day. This particularly affects the A4123 and A4034. To support the development of employment in Black Country West quick and reliable links are needed to and from the motorway network. Interventions here will be focused upon improving journey times for cars and buses reducing accidents and improving air quality.

D7.69 **A4101/A4123 corridor improvements**

This corridor supports the development of Black Country West. The proposed improvements to this corridor will be focused on meeting the outcomes described in D7.

**PRIORITIES FOR ACTION**

**Public Transport**

D7.70 Within these routes, *priority public transport schemes* in the next five years are identified as a focus for investment. These comprise:

- Extending the Metro to Brierley Hill as a priority.
- Creating a public transport interchange in Wolverhampton centre, including redevelopment of the bus station and a new railway station.
- Improvements to Bradford Place Bus Station in Walsall.
Key junction improvements including bus priority measures at A41/Expressway, West Bromwich and Burnt Tree junction.

D7.71 Longer term public transport schemes which require early commitment include:

- Completion of the metro network linking all four Black Country Centres and routes linking the Black Country to Birmingham.
- A further public transport package for Brierley Hill, connecting to housing growth areas;
- Quality bus networks across the Black Country.
- Unlocking economic and housing growth potential.
- Access to Hill Top regeneration areas.

D7.72 The second strand of the Transport Strategy is a series of transport interventions which will unlock the economic and housing growth potential; either by enhancing the existing road network, creating new accesses to release employment land, or reinforcing the economic vitality of our centres. The immediate schemes requiring resource commitment and implementation are those focused upon centres and unlocking priority employment corridors.

**Access to Employment Land Investment Corridors**

D7.73 Longer term schemes to unlock further growth opportunities and to enhance private sector confidence include existing proposals that need commitment to proposed LTP schemes as well as new transport interventions priorities being:

- Darlaston SDA access package.
- M6 junction 10 improvements.
- I54 access package.
- Corridor improvements from M5 Junction 2 to Pensnett, Dudley to serve existing and potential technology-led employment land growth locations.

D7.74 Employment Land Investment Corridors present a particular challenge in helping people travel in a sustainable way as well as an opportunity to develop a range of transport interventions that showcase the latest in transport technology. Companies and organisations in these corridors will be encouraged to develop Travel Plans to help their employees travel to work in a sustainable way and to ensure that as a business their transport needs are met as efficiently as possible. Companies will in the future be
encouraged to make full use of video conferencing, and practices such as
home working to reduce their transport needs and employees will be
couraged to travel to work by public transport or to share car travel.
The challenge will be to make this an attractive option and to cater for
people’s need to travel during the working day for business, for lunch and
to shop. This will mean investigating and implementing where needed
schemes to make full use of information technology, demand responsive
transport systems and individual travel planning.

Enhancing external connectivity

D7.75 External connectivity to UK, European and global markets will be key to
developing the knowledge economy. Firms in high value sectors require
fast and reliable access to international airports; the nearest is
Birmingham but London airports are also within reach. Key accessibility
will be provided through the development of Birmingham New street
station, Birmingham International Airport and improvements to the M5
and M6 through Active Traffic Management and improved motorway
junctions.

D7.76 The role of rail services in an integrated Black Country network will be
tested further to examine the potential for this mode within the demands
of the emerging Black Country Preferred Spatial Option.

D7.77 There is a need for major capacity enhancements at Birmingham New
Street station and on the Wolverhampton to Birmingham New Street
railway line to allow for an increased number of trains into New Street. In
seeking such capacity enhancements there is a need to ensure that the
Black Country section of this railway line is adequately served by local as
well as inter-city services. Four tracking is strongly supported. However
the extension of the Metro network through the Black Country remains the
higher priority towards the sustainability, social and economic imperatives
of the sub-region.

Managing Demand

D7.78 The Government is leading a national debate about the role of demand
management and the implications of such an approach will need to be
considered for the Black Country. The most recent demand management
mechanism is paying directly for road use by road pricing and has
operated in central London since 2003. It is expected that by 2031 a
national electronic road pricing system as outlined by Secretary in a
statement in June 2005 will be operational\textsuperscript{10}.

D7.79 The West Midlands Metropolitan Authorities have been successful in
obtaining funds from the Government’s Transport Innovation Fund (Tif)
set to support the development of transport schemes that feature demand
management as part of efforts to tackle congestion. The work is ongoing
but the results of the work and the decisions taken will influence the Black
Country’s future Transport Strategy. The impact of any proposals from
this West Midlands Tif work will be assessed against the strategy proposed in this chapter.
E MANAGING RISK IN THE STRATEGY

1 OVERVIEW

E1.1 The Consortium is aware that the scale of change in the social, economic and physical fabric of the Black Country, envisaged in the Vision, will inevitably carry risks.

E1.2 The extent of risk is compounded by the strategy requiring delivery on a wide range of programmes involving numerous agencies.

E1.3 The inter-connectedness and inter-dependency of programmes also means that underperformance in achieving key targets has knock-on and adverse effects on others. For example, the retail growth aspirations upon which success of strategic centres is heavily dependent relies upon fulfilling population and housing increases, the projected scale of personal income increase and numerical growth in the A/B households.

E1.4 Arrangements for corporate multi-agency involvement in preparing, monitoring and amending the Delivery Plan will be central to both anticipating shortfall in annual performance and taking early steps towards remedial action.

E1.5 Risk is further compounded by the influence of factors/circumstances outside the immediate control of the Consortium. These relate, firstly, to national economic changes, (interest rates etc), global economic movements and Governmental budgetary allocations. Secondly, the maintenance of complementary policies in the wider West Midlands Region. Their effects will be key influences. Thus for example if the focus of office development on greenfield business parks continues without effective policy intervention and “teeth”, then the prospects for strategic centre growth in offices is severely prejudiced.

E1.6 To an extent this equally applies to complementary policies in adjacent Regions including the contrasting relative market attraction of Milton Keynes for mobile office and manufacturing investment on greenfield sites in a wholly-planned environment, in contrast to the Black Country’s inevitable emphasis on recycling previously-developed land and renewing existing urban fabric.
E2 HOUSING RISK ASSESSMENT

MEETING HOUSING TARGETS

E2.1 Achievement is dependent on land becoming available, demand, locational attractiveness, investment confidence, house builder momentum and interest, the quality of local environments and job availability.

Land supply

E2.2 Land required to fulfil the strategy for +44,000 homes by 2021 and +71,000 by 2031, relies very heavily upon recycling brownfield resources, in accordance with existing RSS policies. The resource will very largely be land in existing or previous industrial use (possibly 75%).

E2.3 Indicatively, this requires the transfer into housing use of c1,100 ha of land by 2021 and 1,700 hectares by 2031. The Housing Capacity Study (Halcrow, Sept 2005) identified sufficient land capable of transfer to housing use for both plan periods. However in so doing, the authors advised of the risk arising from dependency not only on the land itself but the successful process of bringing land forward in sufficient quantities at the time required.

E2.4 This process will be likely to involve land assembly, remediation and reclamation, together with infrastructure necessary to service development. Since many of the potential large sites in single ownership have been redeveloped or committed (e.g. Patent Shaft, Bilston Steelworks, Coors Brewery, Round Oak Steel), provision of large scale sites in future will be more likely to involve land assembly and compulsory purchase in addition.

E2.5 The lead time for larger site preparation can, from experience, involve c. 5 years. Whilst the flow of land for housing has continued in recent years (with an annual requirement of 2,700 net new homes), the period 2011 – 21 involves an accelerated rate of 3,600 units per annum, and by implication a speeding up of land delivery.

E2.6 After a slow start, Black Country Housing completions during 2001 – 05 are approaching required levels, with rates (as a proportion of requirement) for Sandwell (+3%), Walsall (+7%) and Wolverhampton (on target) while Dudley remains 19% under target. This reflects a strong market for new housing throughout the Conurbation – however, the rest of the Conurbation (and adjacent Shire Districts) are doing considerably better (eg Birmingham +19%).

E2.7 There may be a need for the requirement for 2011-21 to make up any deficit in performance before 2011 through an even greater level of acceleration required for that 10 year period.

E2.8 Equally, by reason of anticipated lead times in land provision, the required portfolio of land to accelerate house completions post 2011, will need action now if later shortfalls in supply are to be avoided.
E2.9 The house building industry has confirmed that current shortfalls in supply are largely a consequence of land shortage rather than limited demand.

E2.10 The core of potential housing land lies within the corridors where development will be dependent upon improved public transport networks. Shortfall in efficient public transport could add risk to area attractiveness. It is noted that consultation on the choices indicated the majority support for new housing areas being well served by public transport.

E2.11 An additional pressure upon Black Country land resources is identified by the Ecotec report\(^1\) based on recent research. This concluded that areas of the Black Country close to Birmingham boundaries are experiencing strong net inflow of families from Birmingham resulting from both the “push” of overcrowding and the “pull” of relatively cheaper comparable properties in Smethwick, Aldridge/Great Barr Ward and further afield in Walsall Town Centre area.

E2.12 Further pressures for housing are being experienced by a 26% take-up of houses by people from other areas beyond Birmingham, including overseas.

E2.13 In parallel to both existing internally-generated need, and RSS strategy to reverse net out migration from the area, complementary regional policies seek to increasingly constrain housing supply in the Shire County areas which have traditionally been receptors for Black Country out-migrants, and where priority will be increasingly towards meeting local needs.

E2.14 Thus, Black Country housing land supply has three pressures being exerted upon it:

i) internally-generated need;

ii) increasing constraint upon external housing supply;

ii) additional demands derived largely from within Birmingham and other locations including international in-migrants.

E2.15 The Black Country experiences a high level of local population loyalty with Ecotec reporting 65% of surveyed households planning to remain in the next 10 years. The highest loyalty level is in Dudley. However the population requires housing areas which exhibit:-

- Reducing crime rates.
- Bigger, and more, better quality houses.
- Improved appearance of local areas.
- Improving schools.
- Sufficient jobs.

\(^{1}\) The Black Country and Telford Housing Market Renewal Area – Phase 2, Ecotec, February – April 2006.
• More “professional” jobs.

E2.16 These factors thus play a role as “preconditions” for population retention. Each will be subject to proposed action under the Delivery Plan. Thus as a “seamless” package, they will act as a catalyst to reduce out-migration, providing there is sufficient housing supply.

E2.17 Ecotec’s study revealed disparities between the boroughs as to the likelihood of people leaving the Black Country. 30% of the sample overall planned to leave, with the higher figures being in Sandwell (37%), and Walsall (39%).

E2.18 The Housing Capacity Study provided as an illustration a “what if” risk scenario by discounting anticipated large site land supply by 5+ years in effect extending the supply period to 2036. The effect of this would reduce corridor capacity by up to 30,000 units in the period to 2031 and would also prejudice fulfilment of the RSS target to 2021.

E2.19 Provision of land for housing is thus a key priority for multi-agency action in the Delivery Plan. The focus upon recycling previously developed land brings with it the strong likelihood of public sector financial assistance being required in many cases, regardless of Section 106 funds or other planning charge contributions.

E2.20 An early action priority will be to assess the likely annual resources required from both public and private sources to ensure accelerated housing land delivery.

E2.21 The Strategy seeks also to ensure that all the pre-conditions for successful housing (see D3.40) are met in parallel as part of the inter-connectedness of the Vision delivery. An example of this is the proposed Black Country Sport and Recreation Facility Plan which will identify the facilities needed by population growth and for promotion of culturally and socio economically diverse communities.

E2.22 Annual monitoring will indicate how far the increased rates of housing delivery are being met, and the counteractive measures necessary to ensure adherence to the rate and scale of housing performance.

**Consequences of underperformance in land supply**

E2.23 These may be summarised as:-

i) Continuing net loss of population and households. Whilst 30% of prospective out migrants surveyed by Ecotec sought village life as an alternative to their existing home, there was also a strong aspiration to move to Shire district towns. This implies loss of the people, their income and skills away from the area.

ii) Pressure being exerted on Shire County housing provision.
iii) Potential outflow of Black Country people to regional growth points – Telford and Worcester as the most relevant to the Black Country.

The distance involved increases the likelihood that the people would most likely move job rather than commute into the Black Country. Since traditionally out-migrants have been the more highly skilled, the area loses key workers upon whom a new-technology Black Country economy will be dependent. Equally long-distance commuting is less sustainable and prejudices “quality of life”.

By example as a parallel the Local Plan Inquiry for Malvern Hills in 2005 heard evidence upon the areas shortfall in meeting housing for local needs. Employer evidence indicated that failure to provide adequate “affordable” housing had led to key workers finding homes in Worcester and subsequently resigning to find work closer to home, exacerbating existing shortages of skilled workers in Malvern.

iv) Increasing pressures on existing housing stock.

The net in-migration from Birmingham is already placing additional demands upon existing housing stock in Walsall and Sandwell close to the physical interface with Birmingham.

An increase in demand over supply would increase house prices and reduce affordability. If housing supply beyond the Black Country in Southern Staffordshire (traditional reception area for Black Country out-migrants) is constrained under RSS policy then pent-up demand will increase.

If potential out-migrants do not move, the chain of housing supply reduces, restricting the ability of households who may need to “upsize” (e.g. as a result of overcrowding) to do so.

v) Limited room for manoeuvre

The Housing and Employment Land Capacity Studies (prepared in parallel, and complementary in approach and conclusions) concluded that the scale of land for transfer from employment to housing to meet RSS +5% population levels, represented broadly the upper level of acceptability. Beyond this, land would need to be taken from the portfolio of land that is necessary to provide quality and competitive employment locations. This would prejudice fulfilment of key economic objectives and provision of the scale and nature of jobs necessary to meet Vision requirements.

E2.24 Thus whilst the Delivery Plan might be able to bring forward sites which may be phased for transfer in the later period to 2031, there is no pool of
additional land resource to call on, without prejudicing environmental objectives (including retention of the Green Belt).

**HOUSING VARIETY**

E2.25 The Vision seeks not only to reverse net out-migration but also to help diversify the population structure by accommodating a further 50,000 in the A/B categories households.

E2.26 The Ecotec reports (Ecotec, 2006) indicated the scale of inter-war and early post war housing and the strong emphasis upon supply of municipal accommodation in those periods.

E2.27 This exacerbated the gap between housing to meet higher income household needs and that required to meet needs of people with greater dependency levels.

E2.28 Together with a tight Green Belt boundary and the halt to greenfield housing development, the shortfall of housing for higher income groups and non-dependent households has perpetuated net and selective out migration.

E2.29 If the Vision objective to accommodate more A/B households is to be fulfilled, then there will be great reliance on brownfield (previous industrial sites) to meet needs.

E2.30 To an extent, intensification in suburban areas has contributed to meeting needs of higher income households. However, there is strong political concern (by no means exclusive to the Black Country) as to the scale and pace of suburban intensification, the disjointed manner in which sites come forward and the absence of adequate planning controls to restrain this process.

E2.31 The high risk is that prolonged continuation of the process will prejudice the high environmental qualities of the limited suburban areas able to retain and attract higher income households.

E2.32 It is inevitable that new environments will need to be created from areas with poor quality employment land for transfer to housing. Thus radical environmental improvements will be required to overcome poor image and area stigma; in essence, to create new suburban environments conducive to attracting higher income households.

E2.33 For example, the Ecotec work (Ecotec, 2006) has highlighted that Dudley is the key area capable of attracting back higher income households, with its retail and leisure facilities as the major inducement, and where major poor quality industrial area have the potential for housing.

E2.34 The strategy of the Black Country Development Corporation included radical area transformation, based on multiple action programmes, in the 1980’s/1990’s.
E2.35 Creation of new environments also requires a strong public/private sector partnership together with applying the Urban Park philosophy, and programmes to enhance quality of urban design.

E2.36 This will require application of sufficient pump priming and complementary resource from the public sector to ensure private investment responds to the challenge.

E2.37 It means that the enhancement strategy at local level requires off-site works at a scale necessary to achieve area transformation – again multi agency action, including adequate and attractive transport infrastructure.

E2.38 The Consortium remains confident as to the existence of multiple agency support for area transformation. The risk is that all complementary actions need to be in place in parallel with resources committed in order to achieve the desired output.

E2.39 The Vision seeks to encourage substantial increases in town centre living at the four strategic centres. These will make a significant contribution to meeting higher income household needs – an estimated 7,000+ units derived from the Capacity Study.

E2.40 The ability (beyond that capacity) to meet higher income housing needs is dependent upon the flow of land, as outlined in E2.3 above, with its inherent risks.

**HOUSING DENSITY**

E2.41 The Housing Capacity Study used an average density of 40 dwellings/hectare (gross) in calculating potential capacity. This average has been used in similar studies of South Midlands and Thames Gateway.

E2.42 The Study applied higher densities (70dw/ha) for town centres and public transport interchange locations.

E2.43 The Consortium have been concerned that in order to provide the widest reasonable range of densities, including lower densities to meet higher income household needs, flexibility is required by Government, planning authorities and the house building industry on both an area and site by site basis.

E2.44 The recent Ecotec reports (Ecotec, 2006) has confirmed that from household surveys, 55% of those seeking new accommodation require detached houses, and 23% semi-detached units.

E2.45 Within the demand for larger houses, the BME community are a key element. Provision of lower density 4/5 bed homes in the older areas has proved to be highly popular, enabling higher income BME households to remain close to the ties of kin and community.
E2.46 Failure by any agency as controller or provider of lower density homes will have an inevitable effect on reducing the fulfilment of the Vision in respect of A/B household retention and attraction.

E2.47 In addition, the average density used in the Capacity Study is regarded as an upper limit. Beyond this level, it is considered the quality of life and environment, regarded as central to the attractiveness of the Black Country, will be prejudiced.

E2.48 Whilst increasing site-by-site densities may be regarded by some as a soft option, any such measure will have negative impact. Similarly if monitoring shows that the average of 40dw/ha is failing to be achieved then the option of increasing densities generally as a compensatory measure, would be a high-risk approach.

**GROWTH IN A/B HOUSEHOLDS**

E2.49 The net out migration of 4,000 people per annum from the Black Country has largely comprised those households with higher incomes and skills. Whilst Regional Spatial Strategy seeks to encourage a reversal by restricting Shire County housing supply to focus on local need, success depends on both “pull” and “push” factors being resolved.

E2.50 Out migrants have been attracted by the prospect of village and country-town life, amenities and environment. Attractiveness of housing therein has related to the greater choice and availability and, in part, price.

E2.51 Out-migration is a process common to most larger metropolitan areas and large freestanding towns. Whilst housing availability in the Counties (and in towns such as Lichfield and Cannock) continues, the pull factors remain.

E2.52 The Ecotec Study revealed that in 2001–4 as against housing completion targets, key Shire District figures included:

- Lichfield (105%).
- Bromsgrove (186%).
- Stafford (124%).
- Wyre Forest (153%).
- This represents primarily Greenfield development.

E2.53 Whilst performance in the Black Country Boroughs in 2005 has improved to levels broadly in line with annual targets, completions remain at levels below those being achieved in the Shire Districts.

E2.54 This reflects an imbalance both in the Greenfield/Brownfield and the Black Country/Shire County ratios.

E2.55 In-commuting to the Black Country from such areas is an inevitable consequence until the households choose to move closer to work. Until such time in line with RSS policy, Shire housing completions are reduced
and lower levels of provision come into force post 2011, there is the prospect of the trend continuing.

E2.56 The Ecotec Reports (Ecotec, 2006) revealed that prospective out-migrants are attracted to village life (30%) but with Shire towns also being strong candidates as housing destinations.

E2.57 The process of reversing national trends towards outward movement from the metropolitan areas is highly challenging. In view of the strength of “push” factors, that challenge needs response across a wide range of investment programmes as set out below:

**The scale and composition of new build**

E2.58 New build in the Black Country has not yet been taking place at a sufficient pace or variety to reverse the process of net out-migration required to achieve urban renaissance. In parallel numerous areas which act as recipients for out-migrants are building houses well above annual requirements. Unless the balance can be reversed, early trend reversal will be unlikely. There is thus a high dependency on Shire Authorities willingness and ability to scale down housing provision that would attract out-migrants in the period to 2021, and indeed beyond if the Vision strategy is to continue successfully.

E2.59 The Ecotec Study (Ecotec, 2006) also indicated that the nature of Black Country housing was not as yet reflecting aspirations of potential out-migrants. If demand continues a picture of 40% seeking detached homes and 25% semi’s for example, but provision fails to match these aspirations, then housing composition remains a risk, needing an appropriate response from the house building industry.

E2.60 Similarly, the drive towards higher densities could impact upon the scale of detached housing provision to meet family needs unless there is acceptance of greater flexibility in housing densities to accommodate the aspirations for relatively lower density housing.

E2.61 This suggests that it is essential the Black Country authorities are enabled to approve a greater flexibility in densities to meet, amongst others, the needs of higher income households and families.

E2.62 It is acknowledged that higher density (generally apartment) provision also meets certain A/B aspirations and the needs of smaller households. This places a strong reliance on success of the centres strategy to contribute towards overall dwelling provision and selected A/B household needs, in parallel to development of previous employment land.

**Managerial and professional job provision**

E2.63 The Vision is heavily dependent on achieving a match between retention and attraction of higher skilled households, and provision of new technology and office jobs.
E2.64 Black Country Investment (BCI) as the area’s dedicated inward investment agency, experiences the day-to-day locational requirements of both new and inward, as well as existing job providers.

E2.65 The ready availability of higher skilled qualified personnel is a key factor in decisions as to firms remaining or locating in the Black Country and in respect of preferred locations within the area.

E2.66 The relative and absolute deficiency in housing to retain and attract such personnel has confined the willingness of office occupiers to locate in the area. Proximity to motorway junctions has become a key consideration in locational decisions since it extends the potential catchment area for skilled personnel.

E2.67 BCI Confirm that absence of sufficient higher skilled people or housing areas is a disincentive to mobile office investment. The continuing growth of business parks in Solihull and Shire County locations, which have closer links to A/B households and housing areas compound the problem.

E2.68 The absence of sufficient office and high value added jobs has also been a disincentive to A/B households to remain/come to the Black Country. Insufficient professional jobs in scale and variety have been a key issue affecting retention of higher skilled groups.

E2.69 Thus there is a “chicken and egg” risk situation within this area of interdependent initiatives.

E2.70 The market attraction of town centres for major office growth in the Vision will be dependent upon: -

- Access to the higher skilled groups, and in sufficient quantities. In this, city living and A/B housing close to or highly accessible to the key town centres is critical. Inability to induce both housebuilders and also potential occupiers to new A/B areas in such locations will reduce owner occupier attractiveness.

- Town centre accessibility to the motorway junctions allowing office investors maximum access to A/B groups. Successful and much improved proposed accessibility may encourage external A/B households to locate in the Black Country but only if the scale, choice and location of A/B housing is available. West Bromwich notably is (and with expansion could be even more) accessible to M5/M6.

**Quality of Support Services**

E2.71 Successful attraction of A/B households depends not only on the location and nature of housing available, but also the wider quality of services.

E2.72 In respect of both town centre and education facilities a package of quality services is required.
Town Centres

E2.73 Availability of quality town centre services, proximity to retail and leisure, are paramount considerations. The Ecotec Study concluded that Dudley is the key area of attraction for its shopping and leisure, and Wolverhampton for leisure.

E2.74 For these areas to consolidate and expand attractiveness, and for Sandwell and Walsall to become greater attractions, the Black Country must have quality, vibrant centres with a competitive offer.

E2.75 For “town centre living” expansion, these improvements are also critical. Potential A/B residents need confidence that the centres will continue to provide the necessary qualities.

E2.76 The Gun Wharf in Portsmouth is an example whereby retail development acted as a catalyst for A/B residential development to succeed.

E2.77 Whilst the linkage applies across all centres, the relationship has a key importance in Dudley, and for Brierley Hill/Merry Hill.

E2.78 With Dudley losing its town centre retail attractiveness, Brierley Hill/Merry Hill will need to become the focus for retail investment in Dudley. Dudley borough has also been and will continue to be the main short to medium term focus for A/B expansion. Thus it is essential that improved retail and centres quality and provision of A/B housing go hand-in-hand and in parallel.

E2.79 Substantial post-industrial land will be involved within the immediate catchment of Brierley Hill/Merry Hill. Thus, to provide the service support, Brierley Hill/Merry Hill needs to improve the quality of retail offer and also office growth. This combination will be a key inducement for attracting A/B housing in the area (and also in Brierley Hill/Merry Hill Centre itself).

E2.80 The flexibility in retail offer required to maintain its retail health and town centre status to justify retail and office growth are thus pre-requisites for A/B growth in the area. To an extent this area will act as a template in demonstrating the seamless link between A/B attractiveness, and quality retail and office growth.

E2.81 It follows that having experienced an 11-year (and by 2011 a 15 year) period of curtailed growth it is critical that Brierley Hill/Merry Hill is enabled to provide the necessary and competitive catalyst for A/B growth.

E2.82 Failure to facilitate growth will place in jeopardy the A/B strategy in the most extensive A/B opportunity area in the Black Country.

E2.83 Equally, failure to rejuvenate all key-centres (e.g. Walsall and West Bromwich) risks prejudice to their A/B attraction and retention. With Ecotec concluding that 30% of interviewed residents seek to leave the Black Country (37% in Sandwell and 39% in Walsall) this risk also applies across these key centres.
Education

E2.84 The Consortium regard education as a seamless process from primary to further and higher, and adult learning, as a central component of Visionary change.

E2.85 Quality of education at all levels represents a key factor in population retention including A/B households. It influences locational decisions at primary and secondary levels.

E2.86 It follows that inability to provide the quality and choice of education locally, and follow-on opportunities for developing skills, becomes a key risk factor in area attractiveness.

Quality of Environment

E2.87 A/B households have a greater level of choice and mobility in housing decisions. It follows that the Black Country environment must compare favourably with external locations.

E2.88 In this, the quality of physical environment is a central consideration. Air quality and the history of mixed-use areas with housing and industry relatively close together have been influencing factors. Inability to transform these characteristics satisfactorily will maintain a degree of stigma over much of the Black Country.

E2.89 If large areas are to achieve transformation in a manner which allows them to exhibit the better characteristics of suburban living, then additional A/B housing alone will not achieve long-term durability and confidence in area uplift.

E2.90 Thus whilst key sites will need to provide their own quality internal environments (e.g. canalside zones will be prominent candidates in the corridors strategy), it is critical these are matched with wider area improvements.

E2.91 The Delivery Plan will require demanding and co-ordinated investment programmes, which achieve area transformation. Since local area reputation and image remains a key locational attractor or detractor, area change must run in parallel to quality housing environments.

E2.92 The Ecotec research placed crime reduction and area appearance in the top three criteria for population retention and attractiveness. Security and maintenance of environment are thus key contributing factors in area attraction, and sufficient resources are required if the “jigsaw” of attractiveness is to achieve area transformation and A/B investment.

E2.93 The physical structure of the Black Country has retained strategic green wedges that extend from the open countryside into the heart of the Black Country. These wedges provide an environment of value to all socio-economic groups but are a particular factor in the environment required by many A/B households. Proximity to green wedges to an extent
provides the rural or semi-rural environment valued by A/B households who have the potential to move from the Black Country.

E2.94 Maintenance of these wedges will be central to retention of A/B household environments.

E2.95 However, in order to extend quality A/B housing opportunities, environments of similar attractiveness need to be created in the core of the Black Country. The urban park concept recognises that the Black Country possesses a greater level of “green environment” than is often assumed to exist. The canal corridors possess both extensive green characteristics as well as re-development sites.

E2.96 The strategy has to rely on blending these opportunities. Whilst proximity to countryside has physical and psychological value, the Black Country’s waterway network provides an allied and additional attribute.

E2.97 This represents again both a further critical opportunity for area transformation and an element of risk. People will not invest in new housing (or indeed existing housing areas) if the local environment lacks maintenance and management, security and quality. Inability to channel sufficient resource by public and private sectors into such improvements will prejudice the strategy towards A/B household retention and attractiveness.
E3 CENTRES RISK ASSESSMENT

INTERDEPENDENCIES

E3.1 In projecting the magnitude of retail and office growth required, consultants have applied the key social and economic components of population growth, A/B households growth, growth in personal income levels and the resulting spending capacity.

E3.2 Population growth is a direct output of the RSS housing requirements to 2021 for the Black Country, and is significantly dependent on the scale of land supply, and house building rates, which in themselves are an area of risk as stated earlier in the Study.

E3.3 The growth in the A/B population, intended as an additional 50,000 households by 2031, is a direct consequence of the Black Country stemming the scale of out-migration and attracting people back to the area. These aspirations thus stem directly from the approved RSS.

E3.4 Expenditure arising from the growth in personal incomes will follow in part from the additional levels of higher income households, both retained and attracted back.

E3.5 It will also result from changing skill levels, and the material restructuring and growth in Black Country jobs.

E3.6 The Delivery Plan will be seeking to ensure the seamless relationship between these components of change and a multi-agency commitment to the scale of initiative required.

E3.7 Each of the above-mentioned changes have a direct relationship with each other such that shortfall in achieving one has a knock-on effect on the other.

E3.8 The personal expenditure changes to which the Vision aspires are centrally important to the estimates of retail need, and in part depend on job transformation.

E3.9 The GVA Grimley Black Country Centres report (GVA Grimley, August 2005) translated the Visionary expenditure objectives into retail floor space needs. These objectives have also been reflected by Roger Tym & Partners in the Regional Centres Study option, which set out the Black Country projected level of growth.

E3.10 Monitoring of income growth will be central to ongoing review of retail floor space needs. The Consortium has rejected suggestions of less aspirational growth levels forming the basis for centres retail strategy and the level of retail growth. Income levels are a variable as with the other strategy components. Early amendment to any or a number of the seamless package of proposed strategy assumptions will prejudice the cohesiveness of the strategy as a whole.
E3.11 The Consortium accepts that the monitoring process must continue both at Black Country and Regional levels. Through the Delivery Plan and planning policy reviews, necessary changes can be made in response to the results of monitoring.

**LEAKAGE OF RETAIL EXPENDITURE**

E3.12 The recent consultant report from White Young Green has demonstrated the potential leakage effects of any Black Country centres shortfall in meeting retail need.

E3.13 Centres success is dependent on the sub-region stemming the continuous process of retail expenditure leakage. This has occurred as a consequence firstly of the successful growth of competing strategic centres, notably Birmingham, Solihull and Telford; and secondly, the slow progress in centres growth and rejuvenation in the Black Country. Both processes are closely inter-related.

E3.14 The investment strategy for the four key centres based on growth intentions is the starting point for their rejuvenation. However, key retail occupiers who are increasingly focusing on larger scale operations in larger centres, tend to research and assess the scale of higher income households in the existing or potential catchments before making an investment decision to operate from a centre.

E3.15 It follows that shortfall in growing A/B household areas and retaining higher income groups may prejudice occupier investment confidence.

E3.16 The report of Graham Chase & Partners (Investment Analysis and Future Investment Potential of Black Country Report Centres: Chase & Partners, March 2006) on retail and office investor confidence confirms this view, but also:

- Each of the four centres must exploit their own USP’s and catchment areas which have both discreet as well as overlapping boundaries;
- All four centres by doing so can together meet consumer needs;
- Brierley Hill/Merry Hill, with conditions upon the scale and timing of its growth, both complements the other centres, and is essential to investment confidence in the Black Country and retention of retail expenditure.
- Failure to enable Brierley Hill/Merry Hill to grow its retail role will prejudice the Black Country as a whole. The gap, particularly with Dudley Town Centre’s limited future retail role, will not be made up by the other three strategic centres. This is further confirmed by the White Young Green report which assessed the magnitude of potential leakage as a consequence (Assessment of Future Market Shares and Accommodating Future Needs): (White, Young, Green – May 2006):
E3.17 Thus failure to achieve socio-economic changes, and failure to achieve the complementary growth of all four strategic centres would conspire to prejudice the strategy as a whole.

E3.18 If continuing leakage and underachievement of centres growth occurs coupled with (or stimulated by) growth in competing centres, the potential for both claw back of trade and increased investment confidence will be prejudiced and the spiral of leakage is inevitable as a consequence.

**FAILURE TO ENHANCE AND GROW BRIERLEY HILL/MERRY HILL**

E3.19 The four centre strategy for focusing comparison shopping and offices has recognised the limited future role of Dudley as a strategic centre. This in itself is not a risk. There is a strong evidence base as to the limited future role of Dudley Town centre for retail growth:

- Dudley MBC have examined the physical limitations upon providing sites for future major retail development beyond commitments to 2011 (Dudley MBC Capacity Study).
- Dudley MBC have consulted widely on supplementary guidance for the town centre’s future. This has confirmed the support, substantiated by physical site evidence, for the town centre to focus upon residential renaissance and a tourism and heritage strategic role.
- Dudley MBC has similarly assessed the centres of Halesowen and Stourbridge. This work confirms the limited physical capacity for significant retail or office growth.
- The reports of GVA Grimley (August 2005) and Graham Chase and Partners (March 2006) have both confirmed that Dudley town centre will not be sufficiently attractive to retail investors or operators. The proximity of Brierley Hill/Merry Hill is a material commercial factor, with many of the key High Street operators already represented thereat.

E3.20 Thus if Brierley Hill/Merry Hill is not enabled to grow/adapt to changing operator/customer requirements, the South West of the Black Country and Dudley as a Borough will have no strategic centre capable of absorbing the growth in expenditure and consequential retail expenditure derived from:

- Increasing retail spending from the existing population.
- Increased spend derived from population growth in line with RSS requirements.
- Increased spend derived from the enhanced proportion and number of A/B households and their in-migration to reflect RSS.
- The projected increases in personal incomes.
E3.21 The land capacity studies have shown the considerable housing land opportunities in Dudley derived from poor quality employment areas. The Ecotec report (Ecotec, 2006) confirms that Dudley as a place and as a retail and leisure destination is the key area for attracting and retaining A/B households in the Black Country.

E3.22 Brierley Hill/Merry Hill has been subject to planning restraint and thus no growth in its retail office since 1995. Should the Secretary of State confirm its strategic town centre status no further development would operate before 2011. Thus the centre will have experienced no retail growth for a 15 year period.

E3.23 During this time other competing centres, notably Birmingham and Solihull have expanded substantially and contributed to continuing leakage of retail expenditure from the Black Country.

E3.24 Meantime Walsall, West Bromwich and Wolverhampton centres have not experienced substantial retail expansion and have experienced (West Bromwich notably) the loss of key operators, thus contributing to the leakage of retail spend.

E3.25 Brierley Hill/Merry Hill has exhibited a degree of “retail stress” in the embargo period. Existing retailers have been unable to adapt their floor space efficiency and operators and potential new retailers have been dependent on the vacation of existing units, which in cases have not proved wholly suitable for their operational needs.

E3.26 Despite a strong and sustainable management regime at Brierley Hill/Merry Hill, vacancy rates are now abnormally high. The planning uncertainty as to the principle of growth and adaptation has been a detriment to re-occupation.

E3.27 The absence of a major department store as a catalyst has also been a contributory factor.

E3.28 The role of Brierley Hill/Merry Hill has been a key strategic contribution to local and Black Country regeneration, bringing office, retail and leisure jobs and the commencement of residential interest. The existence of the Brierley Hill Strategic Partnership (BHSP) has facilitated local skills development and recruitment.

E3.29 The growth of Brierley Hill/Merry Hill as a regeneration catalyst is projected to include 12,000 to 14,000 new jobs largely in the office sector. The retail growth of the centre is in itself a major attractor for office investors, and growth in both sectors will be a precondition to encouraging A/B household growth in the locality and Dudley as a whole.

E3.30 The job growth is essential in the context of self-sufficiency and sustainability to provide a fit with A/B household retention and attraction. It is also essential in counterbalancing the likely reduction in manufacturing jobs, this sector having been a traditional economic strength in Dudley.
E3.31 Current evidence from the BHSP demonstrates (through the Regeneris report: Economic Impact of the Expansion of Brierley Hill/Merry Hill: Regeneris, April 2006) the relatively localised workforce catchment for Merry Hill with a strong Dudley and West Sandwell emphasis.

E3.32 The risk of Brierley Hill/Merry Hill not expanding includes the consequential loss of potential jobs to add to diversification, counterbalancing manufacturing losses and providing jobs for an increased population.

E3.33 Failure to provide these jobs not only prejudices these objectives. It also encourages reliance on jobs outside the area with consequential travel and thus negative sustainability impacts.

E3.34 The Black Country Local Authorities have agreed that Brierley Hill/Merry Hill should contribute to retail and office growth in a compatible manner to growth in the other three strategic centres (28% of the growth apportioned to the four centres collectively to both 2021 and 2031).

E3.35 The report from White Young Green (May 2006) confirms that the other three centres, whilst having potential physical capacity to grow and make their own contributions to retail and office needs, would not realistically be able to absorb the level of growth currently apportioned to Merry Hill. Whilst physically they may in time be capable of town centre expansion to grow even further, in market terms this would be unrealistic (e.g. any assumption that a large proportion of Dudley residents would travel to Walsall and West Bromwich for comparison shopping).

E3.36 Failure for Brierley Hill/Merry Hill to expand would leave Dudley as a Borough of over 300,000 without a strategic centre. This loss would intensify retail leakage and the inevitable increase in car travel by Dudley residents to other centres. Such a requirement of local people would inevitably reduce the area’s attractiveness for A/B households and thus prejudice other key objectives of the Black Country Strategy.

RISK TO OTHER STRATEGIC BLACK COUNTRY CENTRES

E3.37 The various relevant consultants reports (GVA 2005; Chase 2006) pinpoint that the scale of projected growth in offices will be a major challenge, requiring a major increase in investor and occupier confidence particularly in Walsall and West Bromwich, both starting from a “lower base” for future growth.

E3.38 The competitive nature of retailing and the office market both affect the position of these two centres relative to each other, Wolverhampton, Brierley Hill/Merry Hill, Birmingham and other competing centres.

E3.39 The Consortium have sought to ensure that whilst Brierley Hill/Merry Hill should become one of its four strategic centres, its continuing growth should be complementary to, and not prejudice either growth or regeneration in the other three centres or smaller centres.
E3.40 Proposed RSS Phase One Revision allows for this. However, the Black Country is at risk of further leakage of retail spending if Walsall, West Bromwich and Wolverhampton fail to fulfil the scale of retail and office growth to contribute to meeting both catchment area requirements and those of the sub-region as a whole.

E3.41 Monitoring the strategy performance against the success of centres regeneration and growth will assist the four boroughs to determine how far the agreed apportionment of growth should be re-appraised.

E3.42 The White Young Green, and Graham Chase & Partners reports emphasise that the destiny of Walsall and West Bromwich in particular is, in part, in the hands of those boroughs as well as the four boroughs as a whole.

E3.43 The Black Country can ill-afford to continue to experience increased leakage of retail expenditure, if for whatever reason one or other of these centres fails to match its growth requirements. The Boroughs will need to monitor and re-phase possible reapportionments of growth to avoid this risk becoming reality.

E3.44 It is important that local authorities work in partnership to encourage and develop a polycentric and balanced network of centres within the City Region and wider West Midlands Region, working towards the Black Country retaining its market share. It will be particularly important to develop a complementary relationship with Birmingham City Centre. The RSS Phase Two Revision will be identifying the investment priorities within the Region’s strategic network of centres, this should take into account the results and objectives of the Black Country Study.

E3.45 Over-emphasis upon continuing retail and office growth of Birmingham City Centre without parallel and early growth in the four Black Country Strategic Centres would accelerate the leakage of retail expenditure from the Black Country. It is important that the sub-region’s centres are enabled to meet the past trends in net out-migration. The early completion and implementation of masterplans for each of the Black Country Strategic Centres will be a critical part of this.

E3.46 In this respect, the attractiveness of sub-regional centres and their prosperity is central to the strategy for the Black Country.
E4 EMPLOYMENT AND EMPLOYMENT LAND RISK ASSESSMENT

E4.1 The Black Country is part of a complex network of residential and employment areas. As such there is an equally complex travel movement to and from work, and interdependency with Birmingham, Southern Staffordshire, Telford and other adjacent areas.

E4.2 The gross and net movement of workers reflects this interdependency. Sandwell, for example, has a net inflow of workers each day from Birmingham, reflecting close juxtaposition of boundaries, and the manufacturing base of Sandwell. Proximity of Birmingham City Centre to Sandwell boundaries might have suggested the reverse would be the case.

E4.3 The employment strategy in the Vision seeks to achieve a broad match between population growth and growth in jobs. Whilst there will continue to be inter-authority dependency as stated above, the strategy seeks to achieve a maximum degree of self-sufficiency.

E4.4 This has strong sustainability benefits as well as counterbalancing the inevitable and large-scale decline in manufacturing jobs in the Black Country. It is equally intended that the strategy for skills development from the primary level to adult learning enables recipients to achieve jobs commensurate with their ability, and which helps enhance personal income levels.

E4.5 The projected growth in jobs (in gross terms, 101,000 jobs in services; 8,000 in retail; 17,000 in logistics and 60,000 knowledge based jobs) represents a net increase of 52,000 jobs in the period to 2021, and 94,000 jobs up to 2031.

E4.6 This scale of change illustrates the high degree of reliance upon successful centres growth.

E4.7 Equally, the strategy relies upon the growth and attraction of knowledge-based activities. Increasingly, they, together with offices, look to availability of an appropriately skilled workforce as a key locational consideration.

E4.8 Any imbalance between the nature and scale of skills uplift, the provision of jobs and needs of the local population will have consequences for activity rates, commuting (in and out) and the area’s attractiveness to households and investors as employers.

E4.9 The sub-region’s attractiveness as an office location has traditionally been of a localised nature – local firms seeking better, or better-located space locally, rather than major mobile employers from beyond the sub-region.

E4.10 Merry Hill as Waterfront provided the key exception, attracting government-related operations, which had a greater level of locational flexibility. This attractiveness included the establishment of purpose-built
office campuses, associated supporting and leisure facilities, surface-level and adequate car parking, environment and prospects for investment growth.

E4.11 The success of Waterfront as the second largest central office area has been in part a consequence of the scale as well as quality of development so that Waterfront was seen as a major office centre in its own right, as opposed to an isolated smaller scale office project.

E4.12 Each strategic centre, including Brierley Hill/Merry Hill, will need to grow offices in a deliberate, focused manner with a strong commitment to powerful marketing in order to convince investors/occupiers that each centre is developing strategically with large-scale flexible space allied to other key attractive and growing central area functions.

E4.13 A high risk factor will be that the scale of warranted growth cannot rely on local markets alone but needs to penetrate national mobile investment markets in order to succeed. The relative strength of Birmingham City Centre and greenfield business parks as office locations must be balanced by Black Country key centres offering competitive rentals, prospects for investment growth and office environments attractive to a potential workforce.

E4.14 The strategy is heavily dependent upon service jobs, particularly in offices. Successful growth in Black Country offices will be dependent upon complimentary policies in the Region to constrain the scale of greenfield business parks, which have absorbed the large proportion of Midlands Region office growth in the last decade.

E4.15 Unless there are strong policies of restriction in place, this process will continue, and the attraction of non-local occupiers to town centre office locations will be reduced as a consequence. The market preference towards greenfield parks stems in part from availability but also ample, surface level car parking, access to motorways and thus to a wide A/B catchment.

E4.16 The risks to the office strategy are:

- Achieving the scale of required growth from a low base.
- An adequate potential workforce.
- Appropriate breadth and nature of skill levels.
- Enhancing market confidence in centres with traditionally low levels of office provision.
- Creating a comprehensive town centre environment.
- Complementary restrictive regional policies on greenfield business parks.
EMPLOYMENT LAND

E4.17 The Consortium acknowledge the historical strength of Black Country manufacturing, its vulnerability to change in markets, the inevitable shake-out of employment as it adapts, the changing locational and environmental requirements, needs for high levels of public transport and highway accessibility and availability of an adequate potential workforce.

E4.18 The encouragement for incubation, new startup business, help towards relocation, adaptation and diversification, are key elements in both Regional and Black Country economic strategies. There is a consensus approach to facilitating adaptation whilst acknowledging the scale and pace of rationalisation.

E4.19 The strategy does not seek to encourage decline in manufacturing in any way, but rather to assist in business adaptation.

E4.20 In this respect the strategy for employment land is a key spatial dimension.

E4.21 Black Country Investments (BCI) is the key local agency to match supply and demand for land or space. There is continuing concern that the sub-region has been lacking a “quality land product” sufficient to attract substantial inward mobile investment.

E4.22 The last 5 years has seen 1,500 enquiries per annum, largely locally based and seeking smaller units. 75% of these failed to satisfy their requirements at all, or they found space outside the area.

E4.23 Additionally, in the same period, 36 enquiries per annum sought land. Again 75% of these failed to satisfy requirements at all or found space elsewhere.

E4.24 BCI believe the absence of a “quality land portfolio” is central to the limited success rate. With some limited exceptions, the Black Country has lacked large-scale sites to attract inward investment. With the exception of i54, Hilton Cross and Featherstone the potential resource is essentially the recycling of brownfield land.

E4.25 The employment land portfolio, excluding the 3 sites mentioned above, comprises 3,900 ha.

E4.26 The land required for transfer to housing comprises circa 1,700 ha to 2031 (circa 1,100 ha to 2021). The strategy seeks to create a new high quality land portfolio within the remaining 2,200 ha, at least to a minimum level of 1,600 ha in total to 2031.

E4.27 This land will function to accommodate relocating Black Country firms, inward investment and new technologies. The challenge represents circa 60 ha per annum and 1,600 ha in total to 2031.
E4.28 The transformation of land to create competitive, manageable and marketable resource requires:

- Land assembly.
- Reclamation and servicing.
- Access.
- High accessibility to public transport and major roads.

E4.29 There is clearly a need for a high level of multi-agency commitment in achieving these requirements. The Delivery Plan will set out the sequence of actions for the delivery of top quality land, which will be protected from pressure for alternative use by Joint Core Strategy policies.

E4.30 Substantial areas within the 2,200 ha potential land resource are currently occupied and will become available as they become vacant or through proactive application of land assembly measures.

E4.31 The strategy has heavy dependency on land becoming available and, since in part this arises from windfall (i.e. unpredictable availability), there is risk as to the pace of change and action required for delivery.

E4.32 The nature of demand in future also carries uncertainty. The BCI data indicates that only approximately 15% of enquiries for premises and land are satisfied. This suggests that there is a large latent demand that could be satisfied if the land product is provided in appropriate locations.

E4.33 There is evidence of new developments in secondary locations that have been marketed as unit schemes for up to 5 years before full occupation is achieved. Secondary locations even with quality land or buildings can be an inhibiting factor to help meet demand.

E4.34 There is a substantial stock of secondary floorspace on the market where demand is absent but landowner expectations on land values are excessive. There is oversupply at present of poor grade premises which act as one deterrent to new investment, and if the strategy is to succeed this stock must be taken out and the land put to productive use, either for employment (if well located) or transfer to housing.

E4.35 Poor accessibility to key locations such as Pensnett in Dudley and north of Aldridge is a deterrent to some components of demand. The transport strategy includes interventions as highway/public transport improvements to achieve reliability and efficiency in gaining access to the major road and motorway networks. Despite good management these areas will become fragile unless the transport investment is provided to enhance their contribution to the top quality portfolio.

E4.36 Land delivery has a further critical role in the relocation process. Area transformation for housing-led regeneration in key areas will be heavily dependent upon relocation of industrial activities.
E4.37 This process will also be dependent on the adequacy of land/premises to meet relocation requirements. A key risk will thus be the shortfall in speed and scale of land delivery and either consequent pent-up demand or delay to transformation programmes to meet housing objectives and the scale of housing provision.
E5 RESOURCE MANAGEMENT

E5.1 The report from Graham Chase & Partners (Chase, 2006) indicates that the management, image and environment of certain Black Country centres can be a major disincentive to new investment and as a consequence success of the strategy.

E5.2 The risk is greatest in respect of centres but the issue also applies to other key strategy areas. The attractiveness of centres for investors, customers and employees relates not only to quality of buildings, vitality and identity, but also to key issues of personal and property security, cleanliness, continuing maintenance, management of vacant property awaiting clearance or re-occupation and the mix of land and building uses.

E5.3 Again there is dependency on long-term multi-agency action by public and private sectors.

E5.4 Newly transformed housing areas will rely upon local area maintenance. Reclaimed land for open space equally requires commitment to maintenance, in the absence of which land can quickly become degraded and unkempt, almost to the point of returning to its former derelict appearance.

E5.5 Likewise, multi-agency commitment is required to programmes of infrastructure renewal and upkeep. This becomes of greater significance in the context of the scale of growth in the strategy.

E5.6 The risks inherent in falling short of resources for management and maintenance are reinforced by the community consultation response that the quality of Black Country environment is of central importance to people living and working in the area.

E5.7 Ecotec research (Ecotec, 2006) also revealed that poverty of environment is a major push factor amongst Black Country residents and amongst those who would wish to leave the area if they had choice and resources to do so.
E6 TRANSPORTATION

E6.1 Section D7 sets out the strategy for transport interventions, linked closely to the pattern of land use transformation.

E6.2 The land use strategy represents an acceleration of processes of change which are under way. This strategy has support from current transport interventions within the LTP and TiF proposals.

E6.3 The current package of transport proposals, prepared in a conurbation-wide context, has roots in improvements to existing networks, of both a highway and public transport nature, reflecting the need to reduce congestion, and to enhance the efficiency of public transport.

E6.4 The Transportation Strategy has now been extended to increasingly reflect the direction, nature and scale of land use change, whilst maintaining the commitment to minimise congestion and encourage modal shift. Essentially the Transport Strategy should be seen as a whole with close interdependency between its components and the land use changes. There is, therefore, a risk should any parts of the strategy fail to materialise.

E6.5 The urban form of the Black Country is still largely built around historic and complex distributions of land use, and a pattern of roads reflecting nineteenth or early twentieth century needs.

E6.6 For the Black Country to become a key part of a twenty-first century competitive City Region, its transportation system must reflect modern day and future transport and land use needs.

E6.7 Ongoing work under the PRISM model is confirming that the package of transport interventions, having been tested against the preferred land use strategy, provides sustainable and integrated solutions.

E6.8 As with other components of the strategy, any shortfall in achieving transport interventions will potentially have knock on effects on strategy as a whole.

E6.9 Thus, in summary, any under-resourcing of transport improvements would selectively or cumulatively:-

i) Reduce the attractiveness of the key town centres;

ii) Prejudice opening up of key employment areas, and thus question their competitive attractiveness;

iii) Fail to provide sustainable linkages between new corridor-based housing regeneration, and enhanced public transport;

iv) Prejudice the opportunity for higher density houses close to public transport interchanges, the provision of which, together with quality services, justifies the higher density. This would reduce
the capacity to fulfil the RSS housing requirements, and a maintenance of the same growth rate beyond 2021 to 2031.

v) Weaken the sustainability of the overall strategy. The independent sustainability appraisal applauded the centres and corridors–based approach linking development with public transport enhancement.

vi) In locations where improved accessibility and public transport servicing are central to effective development, delays to transport infrastructure will delay the bringing forward of land and its development with knock on effects on housing and economic performance.

vii) Fail to control congestion generally and in specific localities. Since congestion is a bar to economic competitiveness any increases will prejudice economic revival.

E6.10 The ongoing PRISM work confirms the technical arguments which justify the top priority given to extending the Metro network in the strategy. The Consortium, therefore, believe it critical that the continuing development of the Metro is maintained as top priority and taking account of its proposed inclusion in RSS Policy T12 as a national\regional priority.

E6.11 Likewise, identified junction improvements on the M5/M6 motorways are proposed within Policy T12 as national/regional priorities, where relief of congestion and increased capacity are regarded as crucial to economic competitiveness and sustainability in the strategy.
WHAT HAPPENS NEXT?

F1 TOWARDS A DELIVERY STRATEGY

Components of ‘delivery’

F1.1 The Black Country vision is wide ranging in its coverage, with spatial and non-spatial components. As such, the Consortium acknowledges that the delivery approach for the vision will involve a wider range of potential activities beyond solely the spatial dimension:

- Strategy promotion and advocacy;
- Policy initiatives and economic/spatial programme alignment;
- Co-ordination of physical and economic activity across a wide stakeholder group;
- Direct delivery activity, including physical projects and non-physical programmes, such as education and skills.

F1.2 The approach to delivering the strategy and priorities for action set out in this report will be set out in the Black Country Strategy Delivery Plan. In developing a delivery approach critical issues are highlighted which require consideration in establishing a delivery framework for the Black Country Strategy. The Consortium in developing this framework seeks to do so against a background of:

- The context for strategy delivery, with reference to the ‘polycentric’ spatial outcome reflected in the strategy (economic competitiveness in the Black Country will be Centres led);
- The priorities for change, reflecting the emphasis on urban renaissance as a key regeneration objective;
- The potential sequencing of intervention, recognising the need to accelerate the rate and quality of private sector investment activity, and;
- Establishing principles regarding the governance arrangements for strategy delivery.

CONTEXT – TRANSFORMATIONAL CHANGE

F1.3 Radical transformation is at the heart of the Black Country strategy. Whilst much regeneration activity is currently underway, successful delivery moving forward will be measured by achieving an acceleration in the scale and rate of change. Achievement of this step change needs to be based on a more co-ordinated approach of the many regeneration delivery vehicles in operation across the Black Country.
The Consortium has concluded that this requires a delivery strategy focused on:

- A dramatic reversal of negative external image;
- Delivering physical change of sufficient scale and impact to redefine the sub-region;
- Maximising connectivity between economic assets;
- Ensuring sustainable outcomes;

**Working towards a ‘polycentric’ outcome**

F1.4 The Black Country’s challenge and approach of establishing a ‘polycentric’ outcome is built upon the following key critical success factors:

- A clear and jointly agreed definition of the roles and functions of different parts of the sub-region, in particular the main urban centres;
- The importance of accentuating the differences and complementarities between centres;
- Districts/boroughs working together to address external competitive threats and exploit opportunities rather than competing amongst themselves;
- New forms of governance that enable decision making to take full account of reciprocal impacts across the sub-region.

F1.5 Much progress has been made in this regard but it is recognised that further refinement is required as a pre-cursor to a successful agreed delivery framework.

**REDUCING INVESTMENT RISKS**

F1.6 Ultimately the aim of the strategy is to increase the scale, rate and quality of private investment in the Black Country. This requires a delivery framework that:

- Gives clarity to investors on the spatial/policy emphasis for different development types;
- Offers a degree of certainty regarding key infrastructure investments;
- Reduces investment risk by minimising competitive threats through the provision of policy certainty and a credible public sector interface;
• Demonstrates effective co-ordination between public sector agencies.

Developers and investors value

F1.7 All evidence points to primacy of the key urban ‘centres’ as drivers of economic competitiveness, and thus they provide a logical starting-point for the required ‘regeneration delivery sequence’. If the Black Country is to deliver the transformational change expressed in the Vision and to become a truly polycentric sub-region, renaissance of the four main centres must be a priority.

F1.8 While this implies investment delivery in all centres, the nature and timing of this is reflected in their respective investment plans which underpin priorities and ‘management’ of growth. Sequencing priorities between centres will be reflected in a Centres Delivery Framework set out in the Delivery Plan.

Narrowing the focus for delivery

F1.9 The demands of the Black Country Strategy require regeneration activity across a broad front, addressing strategic centres, employment land, housing, environment, transport and growth capacity. But successful strategy delivery will also require focus on a narrower range of key areas of intervention with best prospects for early impacts and which can be delivered to the highest quality thresholds. Doing a few things really well is the starting point to Black Country transformational change and image reversal.

F1.10 Given the recognised importance of successful and vibrant centres to sub-regional regeneration, priority actions will be focussed on the main centres of Wolverhampton, Walsall, West Bromwich, Brierley Hill and Dudley. The rationale is clear:

• Successful centres present a positive external image for a sub-region;
• Successful centres support the growth of higher value economic activities, central to the Black Country economic strategy;
• As locations for ‘producer services’ (legal, accountancy, project management etc) successful centres can support logistics and manufacturing sector growth, again key to the economic strategy;
• As cultural and leisure foci, successful centres support population retention and thus labour market enhancement;
• Successful centres drive housing markets and thus support wider housing market renewal prospects across the Black Country;
Successful centres provide the ‘hubs’ to support the case for connectivity improvements;

Urban centres are key knowledge/learning locations.

**SEQUENCING OF REGENERATION INTERVENTIONS**

F1.11 The delivery framework set out in the Black Country Strategy Delivery Plan will be based on three sequential phases of activity over a 25-year time horizon thus providing a clear sequence of targeted activity rather than a barrage of initiatives. In practice the Consortium acknowledges that these will overlap given current projects and regeneration activities. However, the notion of a ‘regeneration sequence’ is supported as a means to highlight priorities for future action and the importance of giving clarity to investors on the role of public sector investment.

**Delivery Phase 1 - ‘Key signals of change’**

F1.12 This phase reflects the need to deliver an early shift in the external perception of the Black Country. This will require key public sector led initiatives that serve to ‘re-brand’ the area as an investment location, with an emphasis on urban centre renaissance. Targeted enhancement to key assets, including cultural and learning facilities in the urban centres, alongside high quality interventions in public realm and gateways will serve to raise the profile and image of the Black Country.

**Delivery Phase 2 - ‘Investment de-risking’**

F1.13 This phase follows the process of perceptual change and a consequential increase in development/investment interest in the Black Country. The role of the public sector moves to one of ‘de-risking’ investment propositions for the private sector through a combination of policy and intervention priorities. The importance of a clear and positive planning policy framework cannot be under-estimated as a delivery tool where building investor confidence is paramount. Critically, there must be clarity on prioritised investment locations’ and the form of investment sought.

F1.14 This phase will involve increased levels of public/private sector partnering, with the public sector playing a key role in land assembly/site preparation in targeted locations and promoting exemplar projects to demonstrate the application of higher design standards, particularly in the context of housing market renewal activity.

**Delivery Phase 3 - ‘Advanced urban management’**

F1.15 This phase of delivery reflects a tapering involvement of the public sector in terms of development/investment delivery and a shift in emphasis towards pro-active urban management. It will be essential to put in place mechanisms to secure the long-term quality and management of new assets created through the regeneration process. Moreover, the sustainability of private sector activity/markets will require effective long-term governance structures to be in place through which the local
authorities can continue to collaborate. This gives ongoing confidence to the private sector about the long-term management of the renewed Black Country.

**GOVERNANCE AND URBAN MANAGEMENT**

F1.16 The level of regeneration ambition reflected in the Black Country Strategy requires a focussed and properly co-ordinated delivery effort – a multiplicity of agencies are involved, a diverse set of policies is under review and the enthusiasm of the community is being harnessed.

F1.17 The scale of change envisaged clearly comes with a major cost to public and private sectors – but putting a ‘price-tag’ on a vision runs the risk of diminishing its value. Moving forward with fundamental change in the form proposed requires a delivery approach based on ‘strategic management’ not ‘project management’. The Black Country Vision therefore requires an enhanced form of ‘urban management’ – one that:

- Places the strategy at the heart of sub-regional policy making;
- Is driven by strong political collaboration and leadership;
- Embraces the widest set of stakeholders within and beyond the Black Country;
- Gives the highest level of confidence to the private sector and reduces, or at least is perceived to reduce investment risks;
- Is led by strategic planning not opportunism.

F1.18 The Black Country has demonstrated an effective collaborative partnership, through the Black Country Consortium. The Consortium model of partnership is founded on the principle of working with Black Country Local Authority Leaders and Chief Executives together with Chair and Executive Directors from the Black Country Learning and Skills Council and Black Country Chamber Business Link. The latter provide representation from the private sector.

F1.19 Black Country Consortium Ltd provides capacity to the City of Wolverhampton and the Boroughs of Walsall, Sandwell and Dudley on three broad function areas.

- Establishing the strategic direction and strategies required. ‘Strategy’.
- Running operations to fill strategic gaps in activity. Operations’.

F1.20 To take forward the Vision, existing mechanisms of urban management between the local authorities are under review together with an anticipated
conclusion to the application process with AWM – the Regional Development Agency to realign the current Regeneration Zones of Future Foundations and Arc of Opportunity within the Black Country Consortium company.

**ACHIEVING STATUS FOR THE BLACK COUNTRY STRATEGY**

F1.21 Consortium stakeholders recognise the need for the Black Country Study to become an embedded feature of regional and sub-regional policy. Indeed, ‘policy alignment’ will be the primary delivery tool at the outset – coherent alignment of a wide range of policy drivers is a pre-requisite for future funding from public and private sector sources. Three stages are envisaged for achieving policy status for the Vision:

**Stage 1** - Securing stakeholder/political support to the principles of the strategy.

**Stage 2** - Developing a formal ‘concordat’ between the Local Authorities giving the Strategy at least materiality and, in time, providing the overall strategic framework for decision-making.

**Stage 3** - Aligning key policy tools at local, sub-regional and regional level to create a supportive context to the Vision.

**Stakeholder/political support**

F1.22 The strategy has evolved through a consultative process. To this extent there is a shared understanding of the rationale and objectives, within the respective local authorities. Initially the case for investment prioritisation based on defined roles and functions for the key centres will be endorsed and articulated widely. In practical terms, it is essential, that the Black Country Strategy becomes the subject of an extended engagement process that leads to widespread understanding of its rationale, implications and potential benefits at sub-regional and regional level. Promoting the Black Country Strategy as a ‘regional project’ aligned to Regional Economic and Regional Spatial Strategy objectives is a key outcome.

**A ‘Concordat’ between local authorities**

F1.23 Long-term visions require more than present day political support. Delivery of the Black Country Strategy relies fundamentally on a long-term political collaboration between the local authorities. The collaboration will be placed on a formal footing that provides a degree of certainty to other stakeholders and confidence to the private sector. A formal ‘concordat’ is being planned together with a ‘sign-up’ to by the four authorities. The symbolic nature of this ‘concordat’ will provide an important ‘key signal of change’ to the market and the Government.
F1.24 This ‘Concordat’ will be well publicised setting out the collaborative principles that will govern working arrangements between the local authorities and potentially the Local Strategic Partnerships, such as:

- Collaborative strategy development arrangements;
- Communication/consultation protocols;
- Resource sharing, and;
- Decision making frameworks.

An essential part of this Concordat will be the preparation and maintenance of a ‘Delivery Plan’, as a key governing document for managing partnership arrangements – in effect the Business Plan identifying key projects and programmes, the lead agencies, the sequence of delivery activity, resources and key delivery risks.

**Aligning key policy tasks**

F1.25 In devising the Strategy, full consideration has been given to the wide range of existing policy mechanisms operating to greater or lesser influence in the Black Country. The Strategy aligns with existing development planning principles and sustainability objectives. This, however, will be kept under review. If the Black Country Strategy is to gain status, then as key policy instruments evolve and are themselves subject to review, links need to be made to ensure complementarity. This should relate particularly to spatial policy, reflected in RSS, LDFs etc, but also in aspatial policies such as the RES. This is a critical delivery task.

**Promoting and marketing the vision**

F1.26 Creating ‘status for the strategy’ is principally about ‘internal’ governance arrangements within the sub-region and, to a degree, at regional level. The next step involves projecting the strategy beyond the sub-region and promoting its principles to external private sector investors. This requires a high profile and well co-ordinated approach that demonstrates priority opportunities and potential within the Black Country.

F1.27 ‘Place’ branding has become a key feature of many urban strategies. Its importance should not be under-estimated – a poor branding strategy can have long-term negative implications while a successful approach to branding can serve to transform external perceptions of a place.

**Managing delivery activity**

F1.28 Rather than establish a bespoke new vehicle, the starting point is planned to build upon the established mechanism of the Black Country Consortium and the two Black Country URCs.
F1.29 The complexity and scale of the Black Country regeneration challenge requires a coherent, prioritised and co-ordinated approach to delivery. As such, the planned delivery governance structure, aims to clarify:

- Who are the key delivery partners;
- Their respective roles and obligations;
- The mechanisms through which roles and obligations will be managed;
- The management structure in terms of strategic direction and executive support.

F1.30 In the immediate delivery phase the focus of delivery effort will be upon generating momentum and profile, which will be achievable by maintaining a dedicated ‘commissioning unit’, as an evolution of the Black Country Consortium and the co-ordination of activities amongst existing Black Country delivery agencies, such as the existing URCs.

F1.31 Balance of effort is required between strategic planning / policy alignment and project development – both are critical to securing funding whether public or private sector. Certainly, the skill set required in the delivery unit in advancing the strategy at the outset will go beyond project management skills.

F1.32 The initial functions and format of a ‘Black Country Delivery Unit’ will be set out in the Black Country Delivery Plan. This will be based on the establishment of a ‘Commissioning Board’ including the bringing together of the two existing Regeneration Zone Boards as an integral part of the Black Country Consortium.

F1.33 Initial focus of commissioning effort will be upon generating momentum and profile against the following objectives:

- **Enterprise and Business Development.**
- **Employment and Skills** – 30 Year Education Employment and Skills Plan.
- **Environment** – land use/transportation restructuring, Centres and environmental transformation.

**The immediate short term**

F1.34 Between the RSS Phase One Revision Submission and the EIP in January 2007, the Consortium will develop the Delivery Plan and the structure of governance for action programmes.
# APPENDIX A1

## CITY REGION: City Region OUTPUT Gap

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<th></th>
<th>Black Country</th>
<th>Birmingham</th>
<th>Solihull</th>
<th>Coventry</th>
<th>City Region without Telford</th>
<th>Telford</th>
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<td>£285</td>
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Approx. £.8bn productivity gap
APPENDIX A2

BLACK COUNTRY CURRENT ECONOMIC PERFORMANCE:
2.6BN OUTPUT GAP

£2.6bn Output Gap
BC vs. England Average

Too Few In Employment
Current BC Employment rate = 70%
  • Current England Employment rate = 74%
  -> 25,000 less people are working in BC vs. Eng Avg.
  • This contributes £.8bn to the output gap
  • Gov. target = 80%
  -> requires 63,000 additional people in work in the BC
  • Reaching this level would increase output by £2bn

Skill Levels Insufficient
  • % with NVQ4 in BC = 17%
  • % with NVQ4 in Eng. = 25%
  -> 52,000 less people with degrees in BC vs. Eng. Avg.
  • This contributes £.8bn to the output gap

An Economy Lacking In Dynamism
  • Business formation rate in BC = 24 per 10,000 population
  • Business formation rate in Eng. = 32 per 10,000 population
  -> 855 less businesses start in the BC each year vs. Eng. Avg.
  • This contributes £1bn to the output gap

Investment Priorities

Full Employment  Skills  Competition  Innovation  Investment  Enterprise

Appendix A2
APPENDIX A3

BIBLIOGRAPHY

Documents referred to in this Black Country Study report are listed below by growth programmes. Those asterisked were prepared by or on behalf of the Black Country Consortium as technical evidence and policy advice informing the Black Country Study. These supporting technical documents are available on:

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Transport Investment Project Prioritization – Connecting to the Black Country*
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**APPENDIX A4**

**GLOSSARY OF TERMS**

**A/B Income Groups**
Socio-economic groupings A/B - which are generally taken to mean those in professional and managerial employment.

**AQMA**
Air Quality Management Areas Local Authorities have to regularly review areas air quality under Part IV of the Environment Act 1995. If areas fail national statutory Air Quality objectives, AQMA’s have to be designated and plans to address the issue produced.

**Biodiversity**
The variety of life on earth including ecosystems, habitats and species and the natural processes occurring between them.

**BEA**
Biodiversity Enhancement Areas Biodiversity Enhancement Areas are identified in the RSS and indicate areas for concentrated biodiversity enhancement. The Black Country has two BEA’s. The first is from Cannock Chase to Sutton Park, via much of rural Walsall. The second is from North Worcestershire into Dudley as far as the Wren’s Nest National Nature Reserve

**BCC**
Black Country Consortium
The company tasked with spearheading the regeneration of the Black Country over the next 30 years. Its founding partners and guarantee members are: Dudley Metropolitan Borough Council, Sandwell Council, Walsall Council, Wolverhampton City Council, Black Country Chamber and Business Link and the Black Country Learning and Skills Council.

**Black Country Strategy**
This is intended to deliver the Black Country Vision. There are three components: a) Growing the Black Country; b) a competitive Black Country; c) a transformed Black Country environment and infrastructure.

**BCE**
Black Country Express
The name given to an integrated transport network in the Black Country, as outlined in the Black Country Vision.

**BCS**
Black Country Study
A dynamic study to develop the long term renaissance of the whole of the Black Country i.e. the City of Wolverhampton and the Boroughs of Walsall, Sandwell and Dudley.
Black Country Vision
Black Country Consortium has developed a vision of what the Black Country would be like in 30 years time.

Bus Priority Lanes
Changes to the road network to encourage faster journey times and improve the reliability of bus services to make public transport a more attractive travel choice.

Catchment Area (Retail)
An area, often considered within easy travelling distance, in which people are happy travelling to shops.

Centre
The heart of a city, town or district e.g. Wolverhampton City Centre.

Climate Change
Refers to changes in long term trends in the average climate, such as the recorded rises in average temperatures. This is acknowledged to be a result of human activity which produces increased emissions of the so-called greenhouse gases, such as carbon dioxide and methane, amongst others.

Corridor
A transport route e.g. roads, railway lines and canals.

Decentralisation
The movement of people and jobs away from major urban areas such as the Black Country.

Demand Management
Demand management seeks to reduce the use of transport networks at times and places where demand is heavy and catering for it in full is not practicable, fundable, environmentally acceptable or an efficient use of resources. Examples for bus and rail transport include concessionary fare schemes and off peak tickets which allow cheaper travel outside the peak hours, when there is spare capacity. Demand for car travel in peak periods can be controlled by the supply and price of car parking in town and city centres. Oxford and York are examples of cities where a substantial increase in the use of public transport, walking and cycling has been achieved by car parking policy, backed by improved bus services and a network of park and ride services.

Demolitions
The knocking down of buildings and other structures.

Density
In residential development terms, this relates to the number of homes per hectare.
Development Plan
A document setting out the Local Planning Authority’s or Regional Planning Body’s policies and proposals for the development and use of land and buildings in its area.

District Centres
Groups of shops and similar premises offering a range of convenience goods and services along with some national chain stores and local shop parades. District centres serve a much smaller catchment area than city centres.

40 Dwellings per Hectare (ha)
Government policy proposes that all housing developments should be above 30 dwellings per hectare. The approved RSS also promotes the need for higher density and higher quality developments. In the case of the Black Country assumed average density of 40 dwellings per ha has been adopted. This will allow for a range of different densities including higher densities where there is demand (e.g. town centres) and lower densities where the existing low density character should be retained.

Green Belt
A designation for land around certain cities and large built up areas, which aims to keep this land permanently open or largely undeveloped. The purpose of green belt is to check the unrestricted sprawl of large built up areas, prevent neighbouring towns from merging, safeguard the countryside from encroachment, preserve the setting and special character of historic towns and assist urban regeneration by encouraging the recycling of derelict and other urban land.

Greenfield site/land
An area of land, usually in agricultural use, that has not previously been developed.

Growth
For the purpose of Black Country Study, this refers to economic growth e.g. increased jobs and average income.

HTC
High Technology Corridor
Specific corridors are identified in the RSS, within which cluster development related to research and development capabilities and advanced technologies will be concentrated. See Prosperity for All diagram p68 of the RSS. e.g. the Wolverhampton Telford Technology Corridor.

House Building Rates
The number of new homes built each year.
HMRA
Housing Market Renewal Area
Set up to tackle the issues of low housing demand and housing abandonment, with sustained action to turn round areas where housing markets have failed.

Inter Modal Logistics Hub
A concentration of logistics businesses with road and rail access.

Joint Core Strategy
This will set out Key Elements of the planning framework for the Black Country. It will compromise a spatial vision and strategic objectives for this area; a spatial strategy; core policies; and a monitoring and implementation framework with clear objectives for achieving delivery.

Knowledge Economy
All occupations and industries are based on knowledge. Knowledge economy usually refers to industries that are relatively intensive in their input of technology and/or human resources.

Knowledge Workers
The term used to describe someone who adds value by processing existing information to create new information, which could be used to define and solve problems. Examples of knowledge workers include lawyers, doctors, diplomats, software developers, managers and bankers.

Land Assembly
Putting larger sites together, either by buying up smaller parcels of land or pulling together different land ownerships to facilitate redevelopment.

Land Use
The designation of a piece of land for a particular purpose.

LDF
Local Development Framework
A folder of development documents that is prepared by Local Authorities that guide future development within a local authority area. Each of the four Local Authorities covered by the Black Country Study (Walsall, Dudley, Wolverhampton & Sandwell) will be producing a Local Development Framework.

Local Development Documents
These are planning documents contained within a Local Development Framework, such as core strategy; site specific allocations of land; and area action plans.
**LNR**
Local Nature Reserve
Local Nature Reserves are for both people and wildlife. They are places with wildlife or geological features that are of special interest locally. They offer people special opportunities to study or learn about nature or simply to enjoy it.

**LSP**
Local Strategic Partnership
An overall partnership of people that brings together organisations from the public, private, community and voluntary sector within a local authority area, with the objective of improving peoples’ quality of life.

**LTP**
Local Transport Plan
A five-year integrated transport strategy prepared by local authorities in partnership with the community and transport providers.

**Logistics Parks**
Firms that specialise in storing and moving goods around are traditionally sited on employment land that is also used for making goods. A Logistics Park would be a large site which would be specially developed to meet the specific needs of these companies (e.g. large buildings, 24 hour access, moving lorries).

**Low Demand (Housing)**
An area of low demand housing would be a neighbourhood where housing is difficult or impossible to let or sell.

**Mixed Use/Mixed Use Development**
A complimentary mix of residential, leisure and commercial development on one site or in one building.

**Open Space**
Any space of public value that provides an opportunity for sport and recreation or acts as a visual resource or wildlife haven e.g. parkland, rivers, canals and reservoirs.

**Out-Migration**
Movement of people away from the Black Country.

**Polycentric City**
An approach to strategic planning which recognizes the diverse multi-centred nature of the Black Country, giving equal consideration to the circumstances and value of each place within it.

**PDL**
Previously Developed Land Also called Brownfield land.
An area of land in a town or city that was previously used for development and where new buildings can now be built.
**Preferred Spatial Strategy**  
The proposed land use pattern and transport network.

**Public Transport Node**  
A place/location where a number of transport services or routes meet.

**Quality Bus Partnership**  
A scheme that represents a commitment of the local authorities to provide certain facilities to improve local bus services and an obligation on the part of participating bus operators to meet the quality standards prescribed in the scheme.

**Quality Employment Land**  
Employment sites that are in demand, in terms of location, accessibility, environmental features and other factors.

**Redevelopment**  
When used in housing terms, it means demolition to allow new development and regeneration of an area.

**Red Route**  
A new way of relieving traffic congestion, primarily by the removal of illegal and inconsiderate parking. The Red Route will use red lines and signs that will clearly indicate where stopping is prohibited and will also clearly define where and when parking and loading is allowed.

**RPB**  
Regional Planning Body  
The responsible body for developing, implementing and monitoring the Regional Spatial Strategy, in the West Midlands it is the West Midlands Regional Assembly. [www.wmra.gov.uk](http://www.wmra.gov.uk)

**RSS**  
Regional Spatial Strategy  
A proposed plan of how a region should look in 15 years time or more. It identifies the scale and distribution of new housing, indicates areas for regeneration, expansion or sub-regional planning and specifies priorities for the environment, transport, infrastructure, economic development, agriculture, minerals and waste treatment/disposal.

**Renewal**  
When used in housing terms it means improvements to existing housing.

**Renewable Energy**  
Energy produced from non-fossil fuel sources (landfill gas, sewage gas, wind, biomass, hydro, solar, biogas, wave).

**SoS**  
Secretary of State  
The Central Government Minister responsible for all polices relating to Town and Country Planning.
Social Polarisation
When a population becomes segregated due to economic and social factors.

Spatial
What happens where in terms of land, transport and other activities.

Spatial Plan
A new plan for development and transport in the Black Country. It will become a part of the Regional Spatial Strategy and this will give it statutory status so that it will have to be taken into account in planning decisions, including decisions on planning applications.

Stakeholders
Organisations, groups and individuals with a vested interest in the region and its development.

Strategic Centre
As defined in RSS (Policy PA11), strategic centres are comprised of the major comparison goods shopping as well as being the main centre for leisure, civic and community uses and preferred office locations.

Sustainable Communities
Places where people want to live and work, now and in the future. They meet the diverse needs of existing and future residents, are sensitive to their environment, and contribute to a high quality of life. They are safe and inclusive, well planned, built and run, and offer equality of opportunity and good services for all. Refer Planning Policy Statement 1 (PPS1) – Delivering Sustainable Communities, www.odpm.gov.uk

Sustainable Development/Sustainability
The concept of meeting the needs of today without compromising the ability of future generations to meet their needs.

Technology Parks
A term used to describe a variety of efforts to stimulate the development of entrepreneurial, knowledge-based enterprises within a region.

UDP
Unitary Development Plan
The former development plan that guided future development and use of land that was prepared by a Metropolitan District and some Unitary Local Authorities. Now superseded by Local Development Frameworks.

Urban Design
The recognition of the form, in terms of both beauty and function, to entire areas or to whole cities. The focus is on the massing and organisation of buildings and on the spaces between them, rather than on the design of individual structures.
Urban Park
A design concept aimed at creating a sustainable landscape plan for the Black Country.

Urban Regeneration
Rebuilding an area by creating jobs, improving the environment and providing new resources such as housing.

URC
Urban Regeneration Company
A body set up to co-ordinate the delivery of urban regeneration projects.

Urban Renaissance
The creation and marketing of sustainable communities in towns and cities where people will choose to live, work and invest.

WFD
Water Framework Directive
Sets a framework, which should provide substantial benefit for the long term sustainable management of water. This Directive is the most substantial piece of water legislation from the EU to date. www.environment-agency.gov.uk

WMRA
West Midlands Regional Assembly
A body of elected and non-elected representatives from across the Region with statutory responsibility for the Regional Spatial Strategy and scrutiny of Advantage West Midlands.

Acknowledgement:
www.gos.gov.uk/gone
www.renewal.net/JargonBuster.asp#r
The ‘planning portal’ website for a collection of useful planning information and further web links, view www.planningportal.gov.uk
APPENDIX D1

EMPLOYMENT GROWTH – SHIFT SHARE ANALYSIS

To further confirm the scale of the challenge, an assessment of the size of the economy that might have been expected, given national economic performance and the Black Country economic structure was prepared by GHK using a shift share analysis (Table below). Shift-share analysis compares local economic performance to national economic performance, by examining the extent to which, on a sector by sector basis, the sectors at a local level perform better or worse, using employment as the measure.

Employment Growth - Shift Share Analysis (based on 1991 employment structure) (‘000 employees)

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<td>Actual Change</td>
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Source: GHK, 2005
APPENDIX D4

BLACK COUNTRY AS URBAN PARK

MAPPING OF EXISTING BLACK COUNTRY SUB-REGIONAL NETWORKS

D4.1 Biodiversity Corridors.

D4.2 Walking and Cycling Routes (Existing Sub-regional Network).

D4.3 Canal Network.

D4.4 Waterways and Water Features.

D4.5 Open Space, Woodland and Green Belt.

D4.6 Heritage Assets of Sub-regional significance.

D4.7 Topography.

D4.8 Neighbourhoods.
Appendix D4.1 Black Country as Urban Park - Biodiversity Corridors

Black Country See it in colour

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Appendix D4.2 Black Country as Urban Park- Walking & Cycling Routes
Appendix D4.4 Black Country as Urban Park - Waterways and Water Features

Appendix D4
Black Country as Urban Park – May 2006
Appendix D4.6 Black Country as Urban Park- Heritage Assets of Sub-Regional Significance
Appendix D4.7 Black Country as Urban Park - Topography

The map shows the topography of the Black Country region, with different areas marked by letters. The map includes labels for Dudley Tourism Centre and the Black Country Observatory. The legend indicates the spot height by meters, with different color ranges indicating various elevation levels.

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Appendix D4.8 Black Country as Urban Park- Neighbourhoods
Appendix D7.1:

Black Country Shared Transport Statement

The Black Country – A Statement of Shared Transport Aspirations

The creation and marketing of sustainable urban communities in which people choose to live, work and invest is fundamental to the achievement of urban renaissance. This is acknowledged in the West Midlands Regional Spatial Strategy and the Black Country’s Vision for Urban Renaissance.

It requires an integrated approach to improving the urban environment, housing choice, access to jobs, transport efficiency, the distinctiveness of centres and service delivery.

The Region’s transport infrastructure needs substantial improvement to facilitate urban renaissance. Congestion constrains existing businesses, discourages inward investment and reduces quality of life.

The Black Country’s 30 year Vision aims to deliver urban renaissance in the sub-region and deal with long term environmental, housing, economic, transport and quality of life and place issues. We need to reduce the £3bn productivity gap.

The Black Country is one of only 3 areas to experience a net loss of population, yet despite having less people living here, projections indicate that the levels of road congestion will continue to increase significantly in the future.

Forecasting future travel patterns indicate an increase in the number of car trips and a decrease in public transport trips, with 83% of trips in 2031 being made by car and 17% by public transport.

A potential increase, over 30 years of an additional number of 71,000 households to reverse the population decline and around 600,000 people working will further augment this situation, unless a sustainable Transport Strategy is put in place.

The people of the Black Country are entitled to a world class transportation system. This will require:

- A high level of aspiration and commitment
- A shared inspirational vision with regional co-operation
- Development of an optimal transport solution for the Black Country
- A clear understanding of the levels of investment needed
- Agreement on the intermediary actions necessary
- Resolution of immediate transport issues
- Efficient use of road space including greater priority for buses and new technology to manage demand
- Action to ensure that the transport needs of the Black Country to support an urban renaissance, are a key part of the Government’s future plans for the West Midlands Region.
To achieve our Vision for the Black Country we will develop a spatial plan that will include new patterns of land use that allow:

- **people** to choose sustainable ways of going to work, to school, to the shops, and to leisure and cultural activities
- **Provides the transport system that modern businesses** demand

To achieve a world class **transport network** in which all modes of transport have their roles to play we will

- Develop new and innovative ways to finance change
- Provide an effective and efficient means to achieve our aspirations
- Develop an integrated strategy that utilises all modes of transport
- Develop high level of external connectivity to national and international markets by air, motorways and rail
- **Exploit Existing Rail** to provide high quality links between centres and to Birmingham International airport.
- **Develop Midland Metro** to provide strategic links between centres as a priority for strategic centres in the Black Country (phase 1 spring 2011, Phases 2a and 2b beyond 2021).
- **Develop a Strategic Bus network** to provide high quality links between all strategic centres and areas of growth.

- Develop high quality road links in a sustainable framework to transport goods and people, within and beyond the Black Country.
- **Create Walking and cycling opportunities** to encourage healthy living and complement the above

To achieve a sustainable way for people and goods to move around we will

- Work with our partners in the West Midlands Urban area and in the wider region to assess how effective management of demand may have a role in achieving this objective.
- Work in partnership with public transport operators and private investors to ensure commitment and investment from public and private organisations.
- Reflect the diversity of the communities that our networks will serve and ensure equality of access through the transport networks we propose.

In order to meet clear **environmental objectives through the Black Country Study** we will test the:

- Concentration of development in strategic centres and the corridors that link these centres. **And;**
- Promote, smarter choices, workplace and school travel plans, personalised travel planning, travel awareness campaigns and public transport marketing, car
clubs and car sharing schemes, teleworking and home shopping.

- Explore new ways of flexible working and networking to help people travel and work in a sustainable way.
- Support the use of new technologies, cleaner fuels, satellite navigation, and real time information.

In order to implement our Transport Strategy, we will

- **Lobby at national level** for the rapid implementation of Midland Metro in the Black Country as a priority within the West Midlands region.

- Present clearly to Central Government the need to take full account of the results of the Black Country Study in their planning of use and evaluation of need, of national road and rail services.

- Work closely with the Highway’s Agency to ensure that the Black Country continues to benefit from its location at the core of the National Highway network.
**APPENDIX D7.2**

**LOCAL TRANSPORT PLAN SCHEMES**

(Black Country relevant)

**Current Schemes**

Red Route Package 1 (traffic management)
Wolverhampton Centre Accesses, Change and Integration
Cradley Heath Town Centre Strategy

**Provisionally Accepted**

Walsall Town Centre Transport Package
Brierley Hill Sustainable Access Network
Darlaston SDA Access Project
Owen Street level crossing relief road

**Programme Commitments Only**

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