West Yorkshire Economic Strategy:
Emerging Evidence Summary Pack

West Yorkshire Economic Strategy: draft policy in development

A new Economic Strategy for West Yorkshire

West Yorkshire is a dynamic economy with a rich industrial past. Innovation and natural resources alongside investment in roads, canals, and then railways led to the towns and cities of West Yorkshire's woollen industry becoming a powerhouse of the industrial revolution and a driver of prosperity across Britain.

Today, the structure of our economy and broad business base means we have a resilient economy not dominated by a single sector. Manufacturing still plays a major role with specialisms in textiles and advanced manufacturing that sit alongside a strong knowledge economy underpinned by excellent universities, and a vibrant cultural offer.

The West Yorkshire Combined Authority has successfully grown as an organisation. From a Combined Authority working in partnership with the Local Enterprise Partnership delivering £0.5 billion of economic development and transport schemes, to a historic devolution deal and directly elected mayor.

Now is the time for a new Economic Strategy to unleash the potential of devolution using open and collaborative policy making with equality, diversity and inclusion at its heart to foster, in partnership, an inclusive, place-based strategy where all communities contribute to, and benefit from a sustainable and inclusive economy.

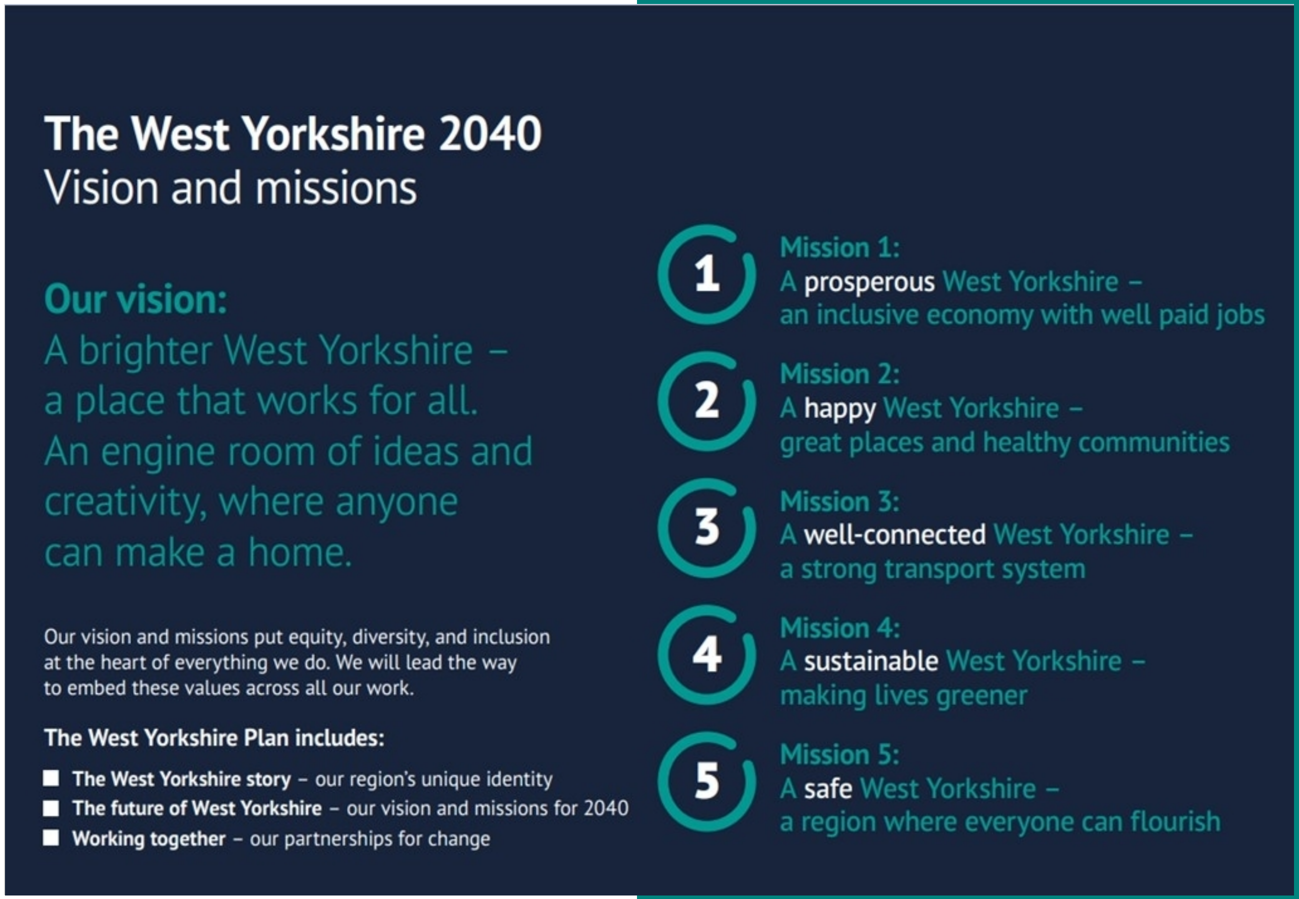
An Economic Strategy to deliver the West Yorkshire Plan

Brexit, the COVID-19 Pandemic, and economic downturns have led to the emergence of new policy priorities in West Yorkshire.

These challenges sit alongside long-term structural issues on productivity, skills, and investment that are holding back the potential of the region.

Responding to these challenges and reflecting new policy drivers led to the vision and five ambitious missions of the West Yorkshire Plan.

The West Yorkshire Plan sets out major commitments on Net Zero and places a sustainable inclusive economy at its heart. The role of health as a driver of prosperity is reflected across the missions with equality, diversity and inclusion a driver across all activity.



Monitoring Indicators

A set of monitoring indicators underpin the West Yorkshire Plan and will be key to the measuring the success of the Economic Strategy.

Mission 1

- Productivity levels
- Number of jobs paying the living wage
- Living Standards
- Child Poverty
- Skill levels, apprenticeship starts and people without employability skills
- The employment rate and % of employees in quality work
- The employment rate gap for disadvantaged groups
- Growth in key sectors.

Mission 2

- Healthy life expectancy
- Access to green space
- Activity levels / participation in sport
- Wellbeing levels
- Access to culture
- Broadband and mobile coverage
- Participation in sport and heritage
- Housing affordability sustainability and quality
- Housing supply including social housing
- Renting costs
- Building energy efficiency and reducing the percentage of households in fuel poverty.

Mission 3

- Access to employment for deprived areas
- Punctuality and reliability of bus and rail services
- Mode share moving from car use to public transport information sources
- Satisfaction with affordability of public transport.

Mission 4

- Reductions in greenhouse gas emissions
- Emissions intensity
- Access to green and blue infrastructure
- Biodiversity
- Transport and household emissions
- Electric buses and EV charging points

Mission 5

- Reduction in neighbourhood crime
- Reduction in knife crime
- Reduction in overall reoffending rate
- Improved feelings of safety especially amongst women and girls

As reported in State of the Region

Developing the Economic Strategy: Methodology

A range of activity is underway to develop the Economic Strategy which has fed into the framework and set of emerging areas for consideration outlined in the summary pack. This includes the following stages of work some of which are still underway:

- Economic Assessment
- West Yorkshire cluster analysis and sector strengths external research commission
- Literature Review
- Call-for-evidence with the Y-PERN network of academics
- West Yorkshire Scientific Advisory Group support on flexible working evidence map
- Your Voice Questionnaire
- Stakeholder engagement key group discussions.

Further synthesis will be undertaken once all stages of development are complete.

Supporting Policies and Strategies

The Economic Strategy is not starting from scratch. A range of existing policies and strategies and current delivery underpins development and will anchor delivery. Key policy developments aligning with the Economic Strategy will include:

- Local Transport Plan
- Digital Blueprint
- All Age Careers and Employment Support
- Climate and Environment Plan.

Alongside strategy development the Economic Strategy will build upon focused activity including the Mayor's Manufacturing Taskforce and the Green Jobs Taskforce.

Economic Assessment

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West Yorkshire Economic Assessment

A comprehensive economic assessment considering the key drivers of productivity in West Yorkshire is being undertaken. The analysis considers the overall performance of the West Yorkshire economy over the past 20 years, exploring the economic geography and local specialisms of the region.

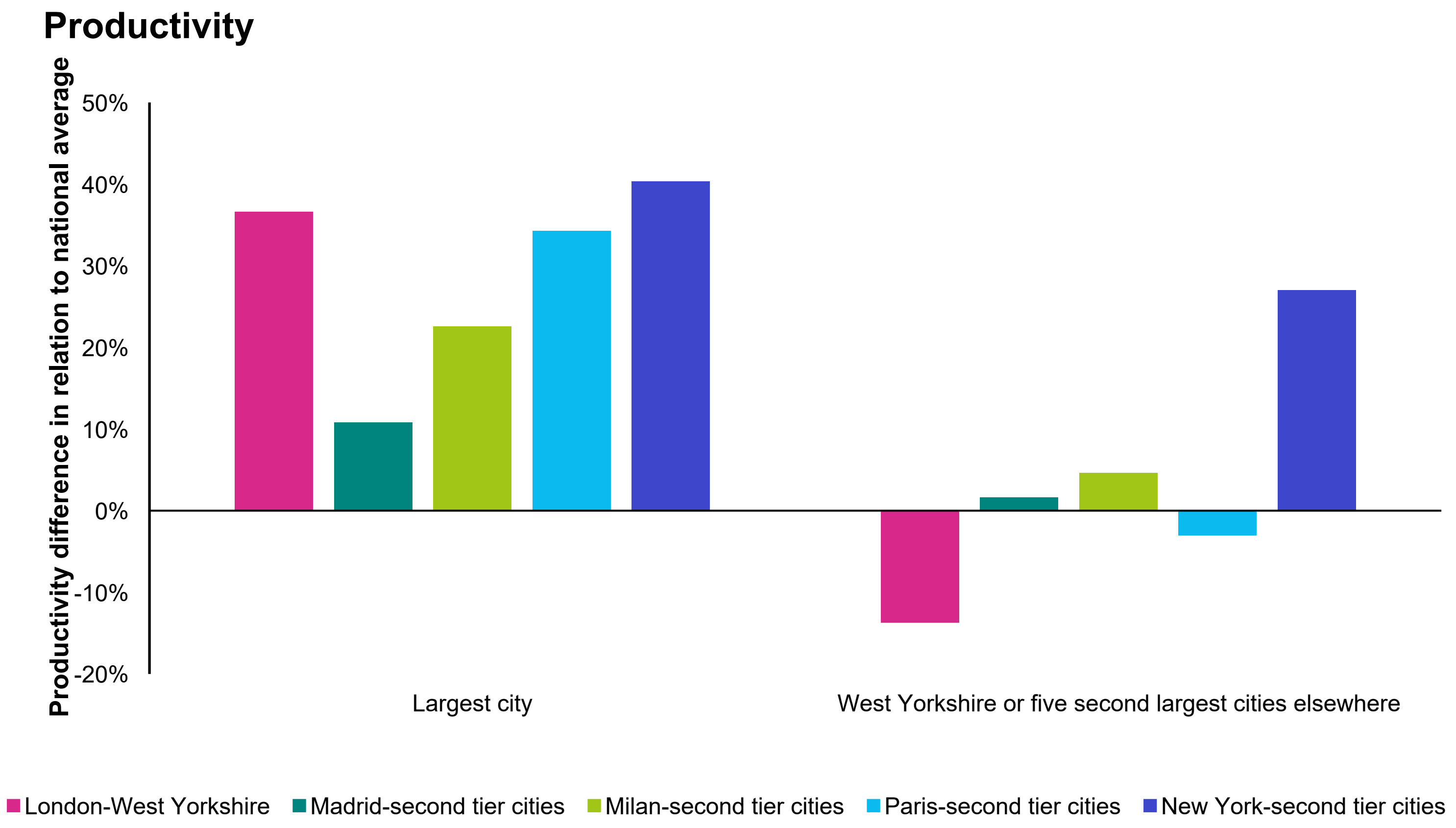
The evidence shows a resilient, diversified, and polycentric economy that nevertheless has struggled to keep pace with national growth and productivity, this has had an adverse effect on living standards.

While the productivity gap is growing and projected to continue, within sector specialisms such as manufacturing sub-sectors, productivity is closer to or higher than the national average. Factors in the poor productivity performance of West Yorkshire include low investment and workforce skills.

West Yorkshire is a self-contained labour market with around 90% of workers living in the Combined Authority. Around 30 per cent of residents work in a different local authority to which they live. These flows are not only driven by people going towards Leeds which accounts for fewer than half of the in-region commuters.

Unlike its international peers, West Yorkshire productivity is below the national average and diverging

Figure 1: Labour productivity (GDP per worker in USD, constant prices, constant PPP, base year 2015)



Source: OECD, Metropolitan areas, GDP per worker.

- West Yorkshire underperforms the national average, while second tier cities in other countries tend to perform in line with the average.
- The gap in West Yorkshire has been widening since the financial crisis and accounts for **£9.6 billion in 2021 alone (around £4,100 per resident)**. Closing the gap would boost West Yorkshire living standards.
- Without action current projections suggest the gap will widen in the next decade and is estimated to reach £14.9bn (around £5,900 per resident) in 2042.

West Yorkshire is a diversified economy

Figure: Industrial specialisms within West Yorkshire

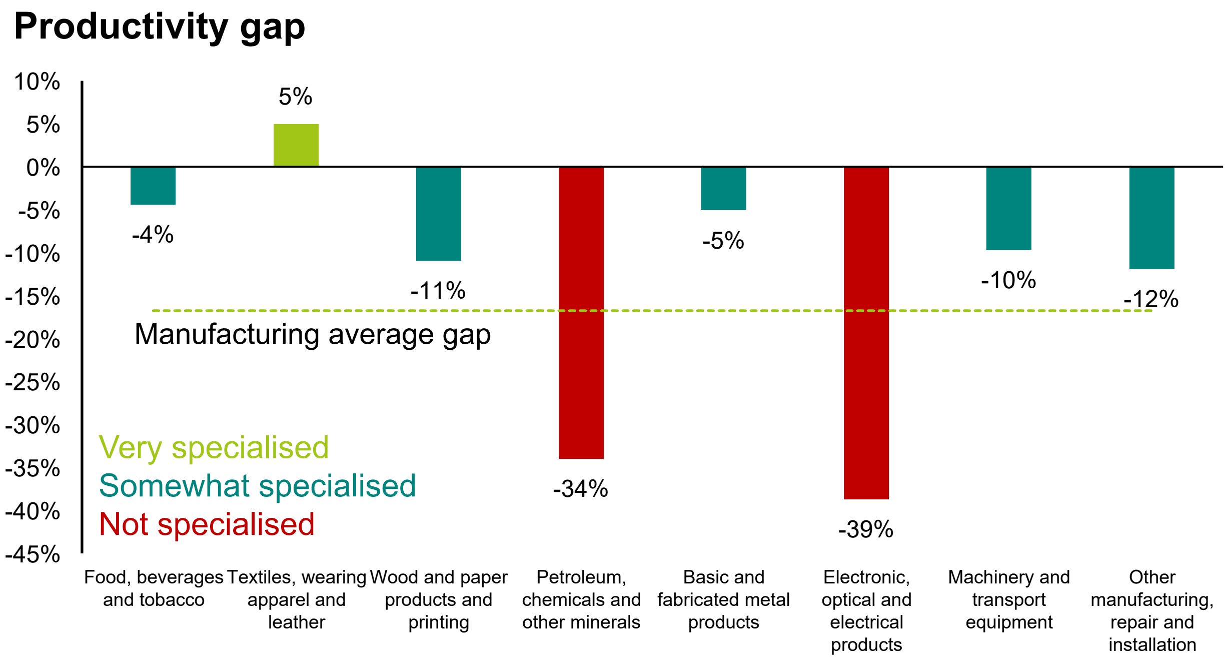
Local Authority	Specialisms (based on job Location Quotients), 2021
Bradford	Textiles Machinery manufacturing Manufacturing of chemicals (detergents, soap and others)
Calderdale	Monetary intermediation Insurance Machinery manufacturing Furniture
Leeds	Office administrative and support activities Legal activities Activities auxiliary to financial services, except insurance and pension funding Head Office Activities
Wakefield	Logistics: transport and warehousing Textile Glass Manufacturing
Kirklees	Furniture Textiles Chemicals. Pesticides and paints

Source: NOMIS Note: The sectors selected are a combination of high Location coefficients and the employment share they represent.

- West Yorkshire has a strong manufacturing sector with more than **100,000 manufacturing jobs -** the highest number of manufacturing jobs per capita in a Combined Authority; and 13.4% of GVA.
- The manufacturing base is diverse both geographically (mostly outside Leeds) and sectorally (textile, chemicals and machinery).
- Across all Combined Authorities, West Yorkshire has the highest number of jobs in “Financial service activities” and “Computer programming, consultancy and related activities” (2021).

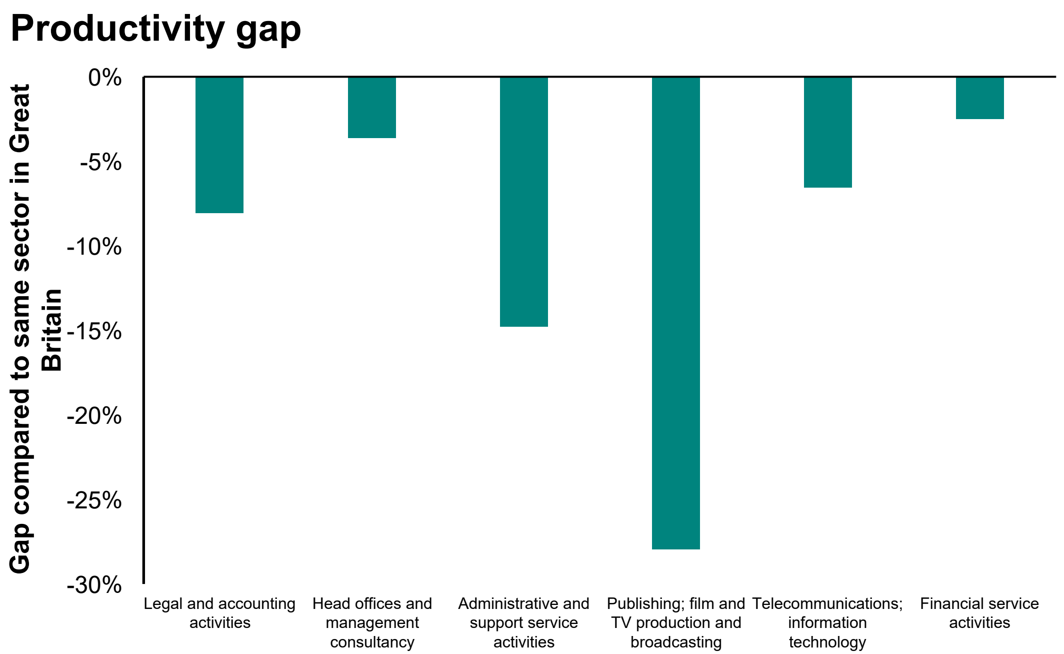
Closing the productivity gap will require new manufacturing specialisms in West Yorkshire and a deepening of existing specialisms in Leeds

Figure: Manufacturing productivity by ITL3 and industry, West Yorkshire 2019



Source: ONS, Regional gross value added (balanced) by industry: all ITL regions. ONS, Business Register and Employment Survey.

Figure: Services productivity in Leeds by its specialisms, 2019

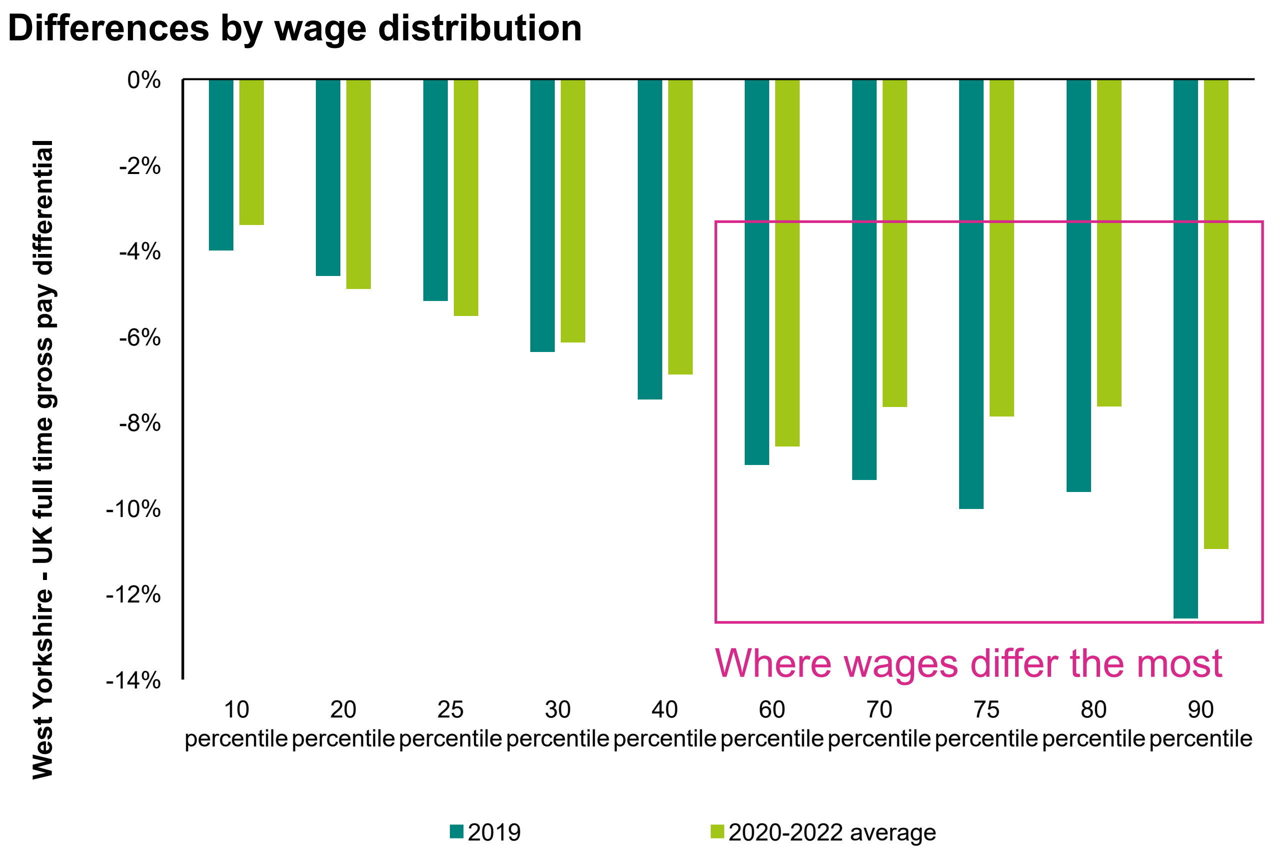


- The main productivity differences are in sectors **in which West Yorkshire is not specialised**. The productivity gap is small in areas that West Yorkshire is specialised. The gap is driven by the absence of specialisms in highly productive industries like electronics (electric lighting equipment vs. electronic components) and chemicals (agrochemicals vs. pharma and petroleum).
- Closing the **productivity gap will require new manufacturing-related specialisms.** Closing (or widening) the gap in existing specialisms may not be enough.

- Leeds underperforms in the services that it has a specialism. Closing the productivity gap requires making those sectors more productive. By attracting new businesses in these sectors and enabling the benefits of agglomeration.

Closing productivity gap alone likely to boost wages at the top but unlikely at the bottom

Figure: Workplace median pay, full time workers by Metropolitan County 2019-2022

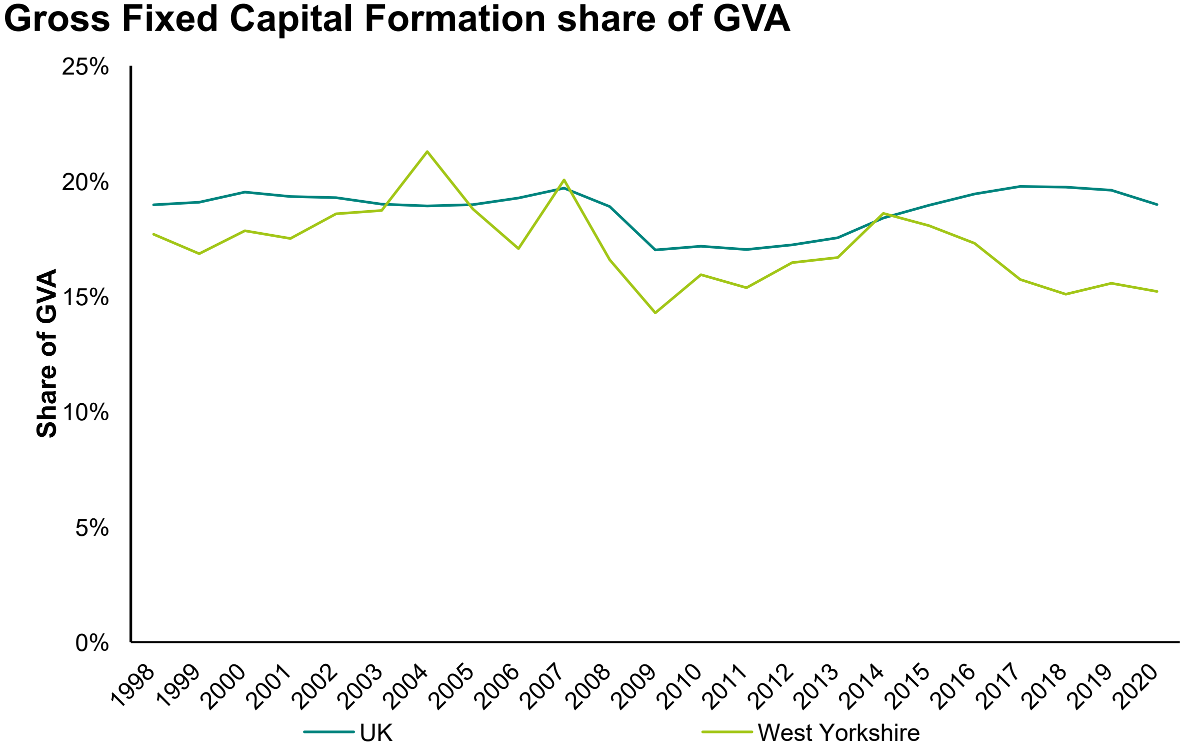


- The same way the productivity gap is driven by the lack of high performing firms, a similar trend is observed in wages, with the largest gap at the top of the distribution.
- The wage differences between West Yorkshire and the national average are **mostly driven by lack of highly paid jobs.**
- Under certain circumstances, closing this gap could lead to issues around housing affordability.
- This highlights the importance **of inclusive growth.**

Source: ONS, annual survey of hours and earnings - workplace analysis.

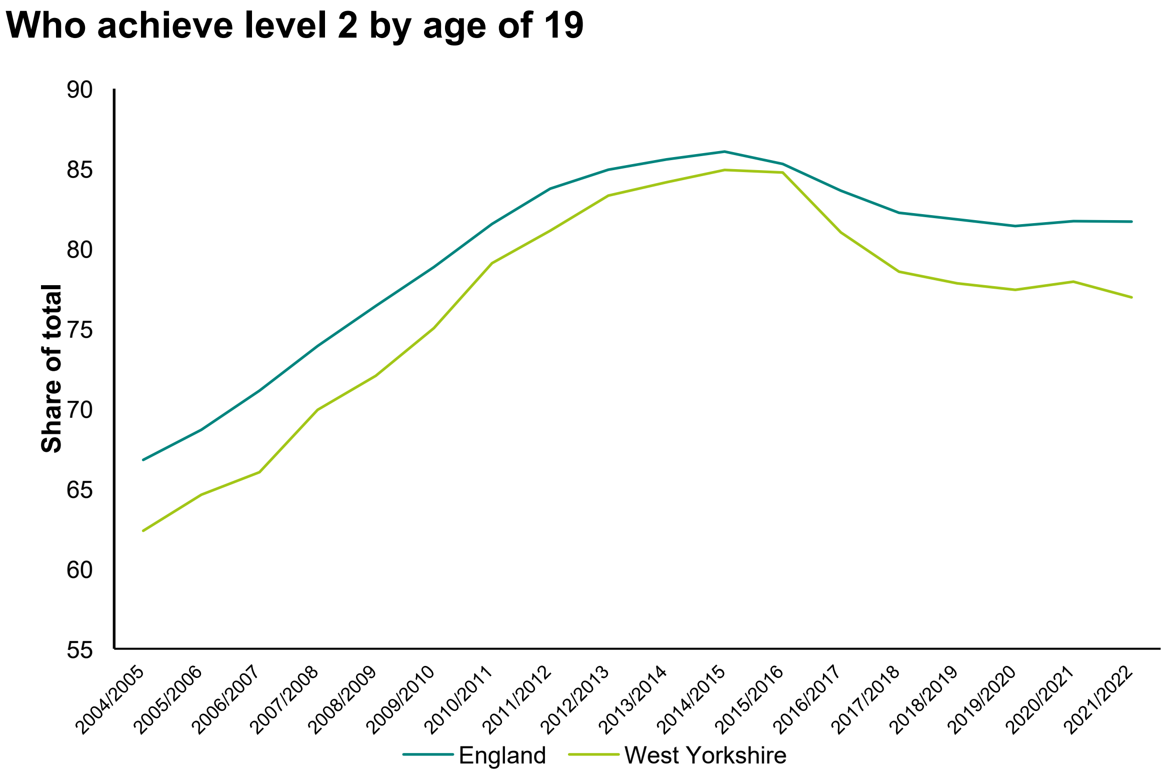
West Yorkshire’s investment and skills profile is diverging from UK average

Figure: Investment at the subnational by ITL2 (1998-2020)



Source: ONS, Experimental regional gross fixed capital formation (GFCF) estimates by asset type: 1997 to 2020. ONS, GVA at ITL2, current price estimates: 1998 to 2020.

Figure: Share of who achieve level 2 and level 3 by the age of 19 (2004/05 and 2021/22)

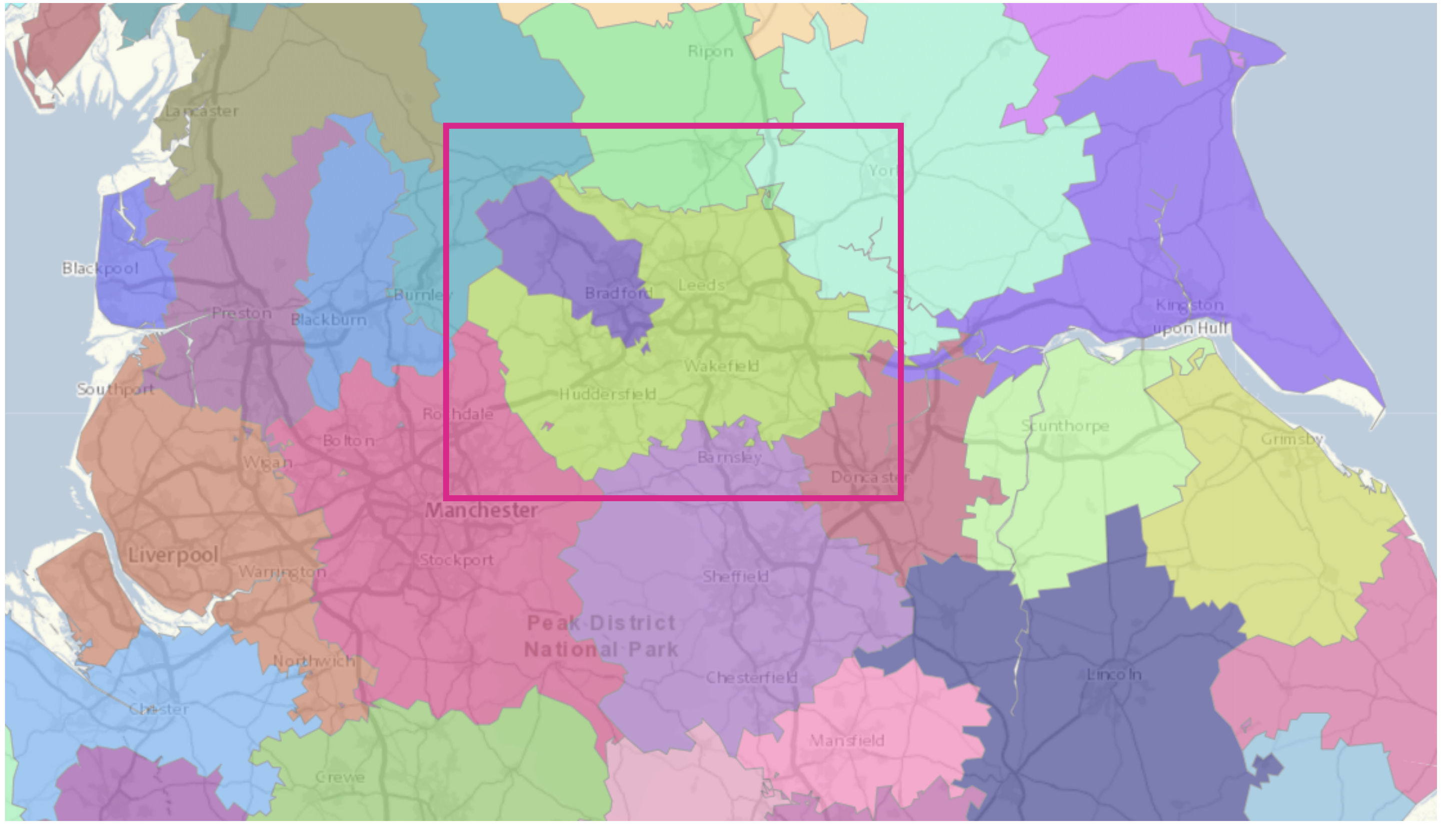


Source: DfE, Level 2 attainment age 16 to 25, Academic year 2021/22.

- The divergence takes place around the **time that West Yorkshire’s productivity diverges from the national average.**
- This is a common feature across all local areas and asset types (buildings, ICT, intangibles, etc) in West Yorkshire similar to national average and there is underperformance in almost all industries.

Interventions should contribute to the integration of the Combined Authority area as a labour market

Figure: Alternative Travel to Work Areas, Full time employed (2011)



- Despite the census showing that there are plenty of flows between local authorities, analysis of Travel to Work Areas (2011) for full time workers suggest that Bradford's labour market is not as integrated into West Yorkshire as other areas.
- This is likely to be driven by a combination of factors like connectivity (road congestion and rail capacity) but also the level of skills of the workforce to benefit from longer commutes.
- Other CA areas do not necessarily match their TTWA (GM and Wigan, or Doncaster and Sheffield) but difference in Bradford seems more significant.

Source: ONS.

Inclusive growth

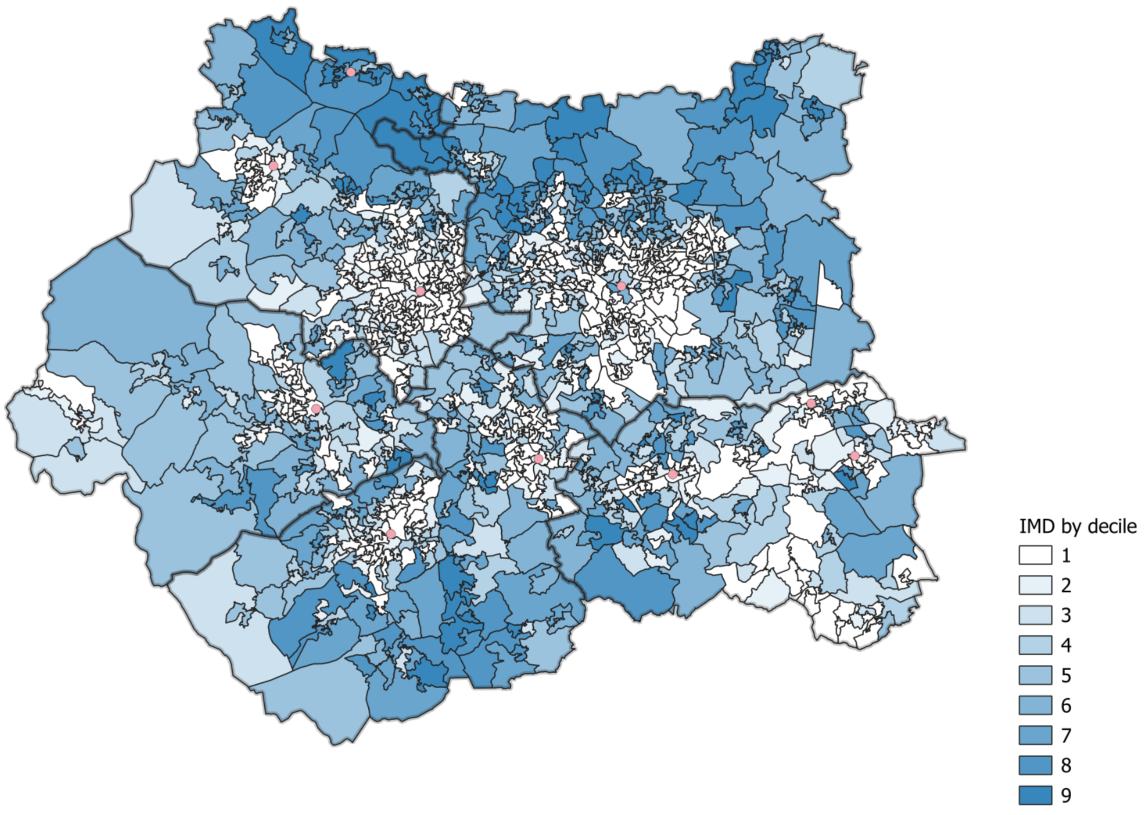
- More than one in five people in West Yorkshire live in areas within the 10% most deprived in England, according to the Index of Multiple Deprivation (IMD). This is equivalent to more than half a million people.

- Healthy life expectancy in West Yorkshire is below the national average for both males and females.

- Around 200,000 jobs in West Yorkshire, or 19% of the total, pay below the Real Living Wage.

- Around 350,000 people are economically inactive in West Yorkshire. West Yorkshire's employment rate gap with national average is due to economic inactivity.

Figure: English Indices of Deprivation 2019 - LSOA Level, by decile



Source: Department for Levelling Up, Housing and Communities.

Sector Analysis and Cluster Study

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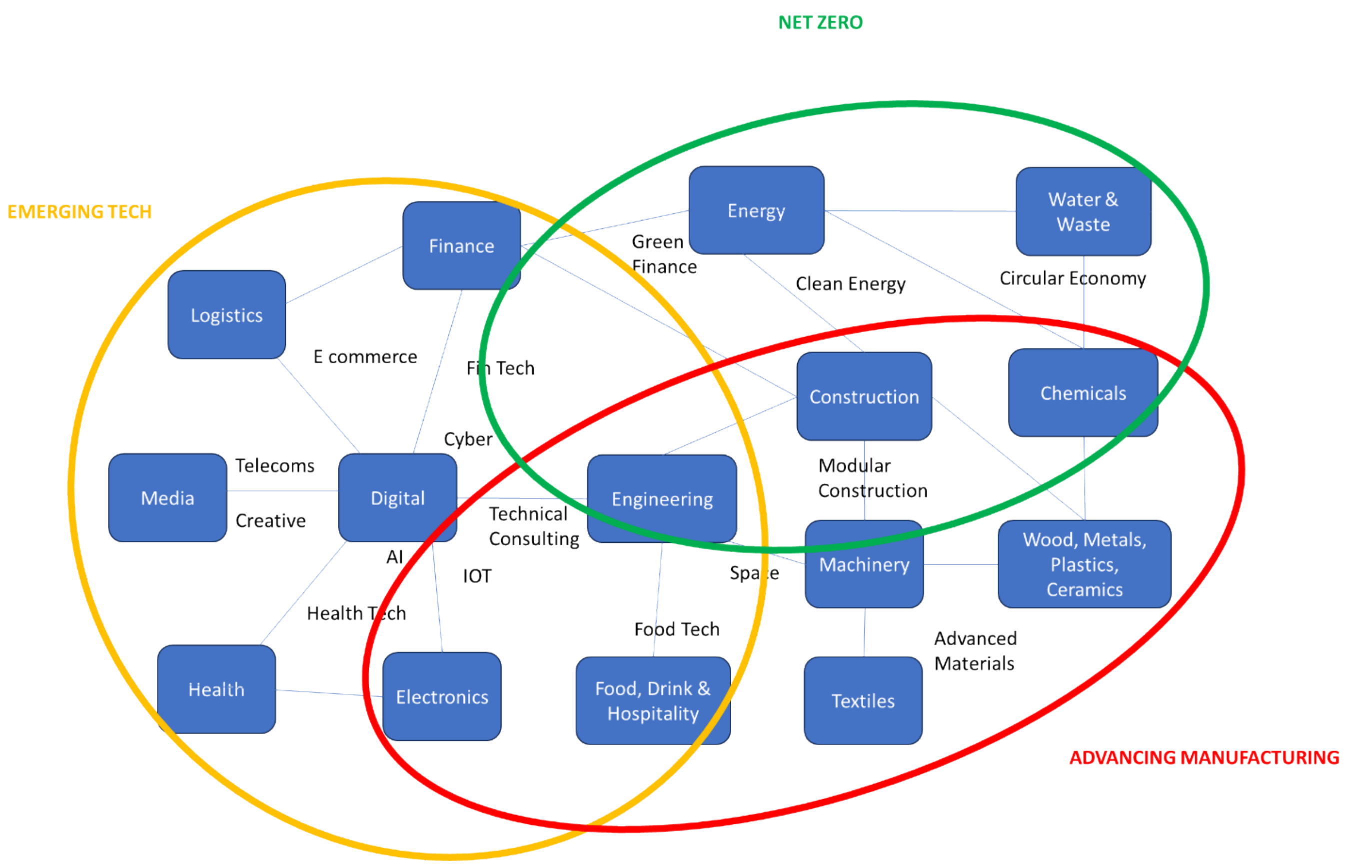
Sector Strengths – cluster analysis

Cambridge Econometrics is leading on a cluster analysis study to understand the sectors where West Yorkshire has comparative advantage and the implications for inclusive growth.



The study is exploring the overlaps between traditional sectors and emerging clusters with 15 traditional sectors linked together with 16 emerging tech clusters (pictured).

The sector/cluster map can be divided into three main (overlapping) groups, each of which represents an opportunity for the region.

Opportunities for Growth

Advanc*ing* Manufacturing: All manufacturing value chains have the potential to be advanced: that is, to use innovative, cutting edge, high-tech, processes. The greatest opportunity for productivity enhancement through facilitation of adoption of modern technologies often lies in sectors such as food and drink, textiles, and materials processing. West Yorkshire has a lot of these categories of firms. These might include:

- Construction and Modular Construction
- Textiles and Advanced Materials
- Hospitality and Food Tech
- Machinery and Advanced Manufacturing.

Emerging Tech – Service Sector Crossovers: There's clearly a synergy happening between Leeds' traditional service sector strengths in Finance, Legal, Education, Health, and its strong and innovative digital sector, leading to the emergence of a number of innovative cross-over sectors (fin tech, health tech, etc). These might include:

- Media, Telecoms, and Creative
- Health and Health Tech
- Electronics and IOT
- Digital and AI
- Logistics and E-commerce
- Fintech and Cyber.

Opportunities for Growth

Net Zero: Of the five main Net Zero initiatives (energy, transport, built environment, industry and land use), West Yorkshire has the sectoral specialisations to lead on two (built environment and industry) and to contribute to the technology supply chains of others (transport, energy and land use). The combination of strengths in manufacturing, other foundational sectors, digital, and professional services really puts West Yorkshire at the forefront of the national decarbonisation objective. These might include:

- Engineering and Technical Consulting
- Finance and Green Finance
- Clean Energy
- Chemicals
- Water, Waste, and Circular Economy.

Next Steps for the study:
The next stage of this work will be to understand the place-based element and emerging opportunities. The groups will be analysed by, ability to attract investment into West Yorkshire, ability to compete internationally, and drive export growth, ability to provide good jobs, ability to help meet national priorities, for example addressing the challenges the UK faces around housing, climate change, infrastructure, health and social care, ability to produce local spillovers, for example by providing innovations that improve delivery of key foundational goods and services.

Call for Evidence: engaging the region’s academic community.

Building our understanding of an inclusive economy

A call for evidence was launched through the Y-PERN network of Yorkshire and Humber universities. A roundtable was held to shape the questions around three core themes for an inclusive economy. The following institutions were involved in the Roundtable and subsequent call for evidence:

- Leeds Arts University
- Leeds Beckett University
- Leeds Conservatoire
- Leeds Trinity University
- University of Bradford
- University of Huddersfield
- University of Leeds.

Building our understanding of an inclusive economy

Theme one: Childcare

Background: Childcare costs in the UK are amongst the highest in the developed world. This is having an impact on parents who would like to work but for whom it is no longer economically viable. Barriers to childcare are having a disproportionate impact on women's participation in the Labour market.

Rationale: to understand the size and scope of childcare provision in West Yorkshire including challenges facing the sector and where barriers exist, understanding costs to the economy including lack of childcare availability for lower income families.

Findings: Responses focussed on the interrelated issues of funding, infrastructure, childcare as work, and the implications of childcare issues for employment and the job market.

Next steps: Building on the call for evidence, funding has been secured for a structured deep-dive to map the system provision of childcare in West Yorkshire and the impact this has on the regional economy.

Theme Two: The Informal Economy

Background: More research is needed to understand the informal economy of West Yorkshire and the implications this has for our policy programme. This includes wider networks across West Yorkshire.

Rationale: The call for evidence sought to understand how can small-scale entrepreneurs and informal small businesses can best be supported by local and regional government; how policy makers can ‘win trust’ and communicate with informal workers and to better understand the help they may need. This included the role of technology and artificial intelligence.

Findings: A wide range of responses were submitted including evidence on entrepreneurship, support for migrant Women in Yorkshire, effective ways for small-scale entrepreneurs and informal small businesses to be supported by local and regional government, and published research on flexible working practices.

Next steps: Further engagement on approaches for business support is being progressed. An evidence review on flexible working is being undertaken by the West Yorkshire Scientific Advisory Group and will be informed by evidence from this call.

Theme Three: Future of Work

Background: Policy interventions to support the future workforce need to be considered as part of emerging trends in particular the impact of AI on the future economy and what this means across all parts of the region.

Rationale: The call for evidence sought to understand what opportunities and challenges recent and potential future developments in artificial intelligence, digitalisation and remote working pose for regional economies, and the West Yorkshire economy specifically. This included examples in terms of policy interventions at regional and local levels that have extended the social and economic benefits of new working practices.

Findings: Responses highlighted the opportunities of AI for the West Yorkshire economy to address long-standing challenges around productivity, alongside the risks including disruptions to traditional labour markets. Responses also highlighted the role for policy makers to proactively shape the opportunities of AI balancing employment practices.

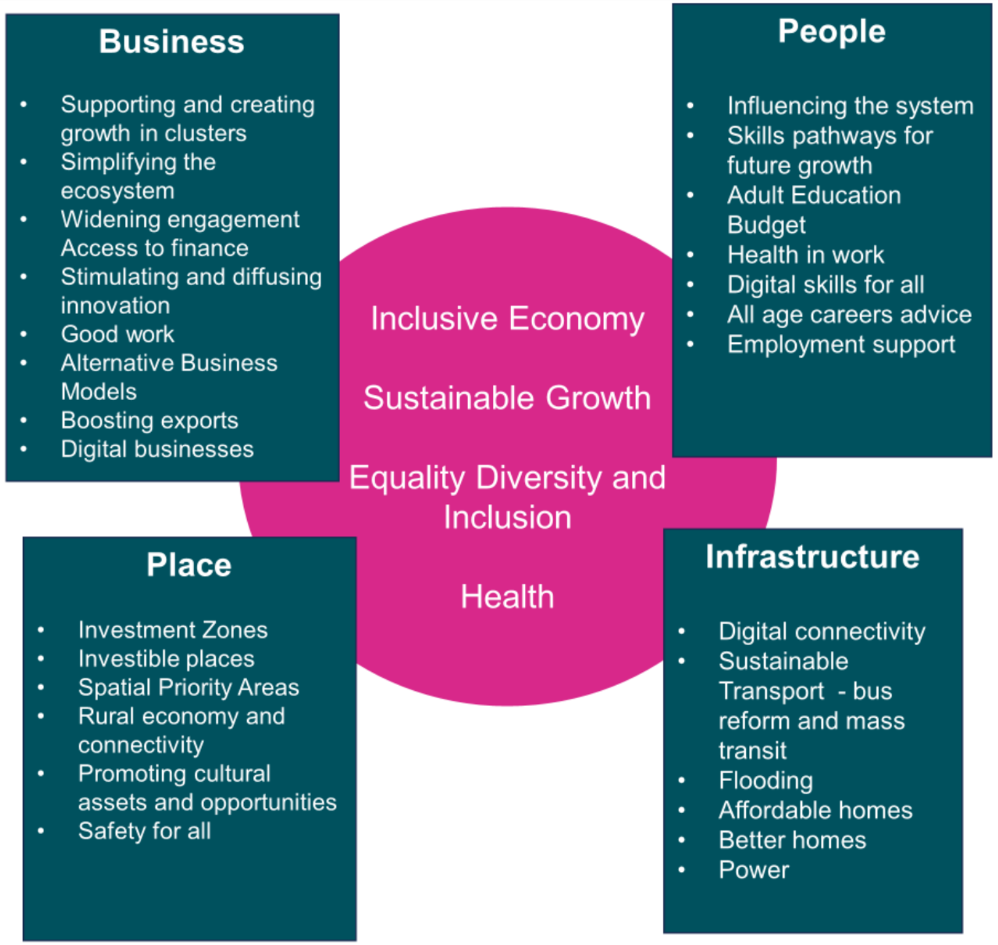
Next steps: alignment of the evidence with outcomes of the West Yorkshire Scientific Advisory Group evidence map on flexible working alongside further input from officers at the Combined Authority.

A full Bibliography with report links (where available) is included at the end of this pack.

A Framework for Action

- This framework for action puts inclusive sustainable growth, and equality, diversity and inclusion at its heart, promoting health in all policies building on our sector strengths in health tech as driving focus for the Economic Strategy.
- The framework aligns with the vision and missions of the West Yorkshire Plan against the pillars of productivity where we need to act. Prioritisation must unpick the relationship between prosperity and inclusivity ensuring that all areas can benefit from the region's strengths.
- Building on the evidence and stakeholder engagement, a series of emerging areas for consideration are set out below. These are draft and will be subject to further discussion and iteration as the evidence collection concludes, and stakeholder engagement continues. This is not an exhaustive list and once all stage of evidence collection are complete will be added to.

The draft priorities below relate to the Business Pillar.



Draft Priorities

Business

Building on strengths where West Yorkshire has a comparative advantage in established and emerging clusters:

- Build on and work with business leaders to overcome barriers and unlock investment
- Working with cluster leadership bodies nationally and make links regionally including with universities
- Support opportunities to drive export growth
- Delivering skills pathways aligned to cluster opportunities
- Working with local authorities to ensure the quality and availability of business premises
- Build on the Investment Zones model to wider sectors / clusters of excellence across West Yorkshire linking to university expertise, national and regional bodies.
- Sector targeting for productivity growth must reflect our ambitions for an inclusive economy and consider synergies between sectors. We need to widen our understanding of productivity drivers to consider the impacts of issues such as childcare.

Draft Priorities

We want to ensure that the areas of West Yorkshire's economy can promote good work but particularly in those sectors where there are high numbers of employment such as retail and hospitality:

- Capturing learning from the first year of delivery of the Fair Work Charter and building on the successes
- Working with sectors to support uptake and embed good practice bringing together communities of good practice
- Building on best practice of what works in boosting low productivity, especially in sectors of the West Yorkshire economy currently characterised by large scale, low pay employment.
- Supporting businesses to implement sustainability changes.

We need to deepen our understanding of the finance landscape to include a focus on place-based impact investing and investment opportunities for under-represented groups.

- Provision of grants will not be sufficient to address the investment gap in West Yorkshire. Our role to foster the right conditions for investment and leverage funding should be strengthened. Investment Zones provide a strategic opportunity to do this.

Draft Areas for Action

We must simplify the business ecosystem recognising the role of the Combined Authority as a convenor of support and raising awareness of all types of provision:

- A clear, easy to access portal of information for businesses and professional services.
- We must consider informal networks and key individuals within these networks to broaden our reach and sign-posting activity.
- We must do more to celebrate and elevate the diversity of businesses in our region including in sectors not directly supported by Combined Authority programmes.
- Alternative business models should also be considered alongside an articulation of the role of the Combined Authority.
- The COVID-19 Pandemic has impacted upon the future of work, we must reflect these opportunities in our offer of business support reflecting the needs of different types of businesses and understanding more on the potential of the informal economy and informal support networks that exist.

Draft Areas for Action

- Skills are a big driver of inequality between places and have central role to play in an inclusive economy. There is a need to move beyond just upskilling and understand where it might be more appropriate to focus support on lower-level skills with the opportunity to open-up progression routes.

- Our review of the skills system and further devolution will support our ambition to fully integrate business and skills working with local employers to understand their current and future skills needs and make sure our schools, colleges, universities and training providers deliver the right courses to meet these.

Continuing to build the evidence base

We must recognise the scale of the challenge and ongoing need for evidence:

- The Economic Strategy is being built on a strong evidence base, this must continue to be built on and utilised as a resource for partners across the region.
- Data sharing internally and externally is underdeveloped and should form a strand of activity emerging from the Economic Strategy, enhanced data sharing from Government through devolution should be part of this. This will build on recent agreements made with Innovate UK.
- We must continue to build on our evidence base and strategic academic partnerships to embed the best evidence in our policy making including addressing gaps and continuing to commission research where it’s needed most.
- Citizen engagement panels and young person engagement in a more structured way should be a consideration.

Outcomes and prioritisation

A robust monitoring and outcome framework must underpin the Economic Strategy, this will bring together programme and project reporting across the Combined Authority and partners. Key principles include:

- Building on the monitoring indicators of the West Yorkshire Plan
- Prioritization is key and it will be important to develop a robust framework decisions made about the Economic Strategy
- Work will take place to unpick potential trade-offs and support development of a framework for prioritisation.

Call for Evidence: Bibliography

A list of responses received is set out below:

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