

This monitor aims to pull together information across regional partners to understand the impacts of Covid-19 on the economy. Where possible it will utilise all forms of quantitative and qualitative intelligence. However we urge caution in the use of the contents as this is an emerging situation.

Key Issues

- Localised rises in Covid-19 infections in China, the USA and parts of Europe have raised fears of a second spike. The UK has imposed a 14-day quarantine on travellers returning from Spain at the height of the holiday season.
- There have been increases in infections across all constituent members of the WMCA, with particular concerns about the rise in Sandwell. Possible local lockdowns are a cause of concern. Deaths from Covid-19 are currently at low levels.
- There are ongoing concerns about challenges in planning for the future relationship with the EU. There is also the issue of upcoming changes in the UK internal market. Businesses do not have the energy or capacity or resources to prepare in the same way as in 2019.
- The UK may have reached 'peak petrol': half of people in the UK say they would now consider switching to an electric vehicle.
- Local intelligence suggests a rise in employers thinking about redundancies (especially when furlough ends). This is also reflected in a rise in queries to business and professional services providers on legal and HR issues. There are calls for furlough extensions in the automotive and aerospace sectors. Logistics costs and lead times are increasing.
- Women – particularly those from BAME groups – are on the frontline of the Covid-19 crisis, comprising large proportions of health and care workers and also being concentrated in sectors and occupations vulnerable to precarity and poverty. Women in social grades D and E have been disproportionately impacted by furlough. Amongst parents mothers' work time is more likely to be interrupted by caring responsibilities than fathers' work time. Twice as many women surveyed in the West Midlands reported that their self-confidence had worsened rather than improved in recent months.
- There have been particularly large relative increases in youth claimants (albeit from a low base) in more prosperous areas (e.g. South Warwickshire).
- There is a danger that young people who are most disadvantaged in the labour market will get pushed to the back of the queue for jobs. The Final Assessment of the National Lottery Talent Match programme (launched in the aftermath of the last recession) helping NEET young people towards employment has been published. This voluntary programme delivered by local partnerships, and co-designed and co-delivered by young people, highlights that beneficiary involvement needs to be an integral part of future programmes to address youth worklessness. Talent Match was delivered via key workers using a person-centred approach. The programme had high reported levels of job satisfaction, improved well-being and a positive social benefit with at least £3.08 of public value generated for every £1 spent. Talent Match highlights the value of investment in co-ordinated and collaborative local youth employment partnerships.
- Apprenticeships are central to the strategy to improve skills and jobs. In the WMCA area, a third as many apprentices were recruited in 2020 up to April as in the previous two quarters. September-October is the peak time for apprenticeship starts and if recruitment then is muted we will see a sharp year-on-year decline. In June 2020 there were 5,624 apprenticeship job postings across the 3-LEP area, compared with 10,601 in June 2019. Apprenticeship postings are down more than for all other job postings, indicating weaker demand from employers for apprenticeships.
- The Social Mobility Commission has published a report 'Moving Out to Move On' investigating the link between internal migration in Britain, disadvantage and social mobility. Consideration of the relationship between geographical mobility and social mobility is timely given the likely impact of Covid-19 on accelerating existing international trends towards slowing geographical mobility within countries and concerns about a K-shaped recovery. Research suggests that limited spatial horizons can check social mobility, while over several decades career progression is enhanced by moves to London and the Greater South East: an 'escalator region' for social mobility – although the gap between the advantage of London over second-tier cities has narrowed.

- Brexit and changes in immigration policy may mean fewer international migrants to fill jobs in London and the Greater South East in the short- and medium-term, opening up more opportunities there for internal migrants from elsewhere in Britain.
- The young and highly educated have the greatest propensity to be geographically mobile and the Social Mobility Commission analysis reports that movers are more likely to be employed and to work in higher level managerial occupations. Better off people move to better off areas, so compounding geographical disparities.
- Moves to higher education are an important element of long-distance moves. Any reduction in higher education related moves in the Covid-19 crisis has implications for longer-term mobility over the life course. Lower levels of geographical mobility may mean more stable communities, but may also mean less social mobility and entrenchment of spatial differences. It is hard to achieve social mobility in a depressed labour market. Universities and colleges need to work together to ensure a coherent offer for school leavers.
- Covid-19 may accentuate the trend to more home working and less employment-related migration. This highlights the importance for regions and local areas of place attractiveness – both for attracting new people and retaining the existing population.
- The West Midlands is participating in the MIT Regional Entrepreneurship and Acceleration Programme (REAP) to help aid economic recovery by deepening collective efforts and a community of practice focusing on innovation and entrepreneurship. Work is underway to develop regional measures of Innovation capacity (I-Cap) and Entrepreneurial capacity (E-Cap) encompassing human capital, funding, infrastructure, demand, and culture and incentives. Strengths of the West Midlands include a large university sector, business-led innovation, good connections to UK and international markets and a range of sectoral strengths.
- There is continued interest amongst West Midlands' companies in support for moving processes and services online. Qualitative intelligence points to the paucity of UK investment in AI vis-a vis China.
- Analysis of distance to the Sustainable Development Goals (SDGs) is presented showing the position of the wider West Midlands region vis-à-vis other regions and the UK. The Covid-19 crisis is having a significant direct impacts on the SDG for health and well-being. There are also significant impacts on SDGs associated with 'people', 'partnerships' and 'prosperity'. The digital divide, health accessibility, work security and social protection have been exposed by the Covid-19 crisis and are being re-thought to ensure development that brings inclusivity, sustainability and prosperity to all communities and places.
- Latest ONS indicators across the UK (no regional breakdown available) show that between 29th June and 12th July, 92% of responding businesses were currently trading with 16% of the workforce on furlough leave. 12% of businesses had diversified to provide new goods or services. High street footfall on 14th July was at 60% of the level of a year before.

Outlook

Global Outlook

[China](#) reported a localised rise in new coronavirus cases, coming from local infections, as opposed to recent imported cases.

[In the U.S.](#) the death toll crept up to 150,000, despite daily infections slowing in some of the hard-hit sunshine states. Anthony Fauci has said its "reasonable" to say that by December we're going to have an effective vaccine.

[Moderna Inc.'s drug candidate](#) has reported to protect against the virus in a trial that inoculated 16 monkeys.

[Stocks in Hong Kong](#) saw modest gains in shares outperforming stock in China. Japan's shares fell as Fitch Ratings cut the outlook on the country's sovereign debt rating to negative from stable. European and U.S. index futures are pointing to lower returns. The value of gold has also slid.

[Goldman Sachs](#) has warned that the dollar's world reserve status is at risk due to economic and political instability. In short the markets and economic indicators are behaving erratically.

National Outlook

[The U.K. is](#) considering ways to loosen its quarantine rules after it hastily imposing restrictions on holidays to Spain. Spanish Prime Minister Pedro Sanchez is also [facing the prospect](#) of losing German tourists in the busiest summer month as well, a blow to the Spanish economy of which tourism is significant part.

Few retailers have gained during lockdown, however [Games Workshop](#) increased sales by 5% to £269.7million, with ore tax profits rising by 8%, despite six weeks of store closures.

According to analysis by Deloitte the UK may have ['reached peak petrol'](#) with sales of combustion engine cars falling. The research shows sales of

diesel have experienced the steepest decline. Polling shows that half of people in the UK would consider switching to an electric vehicle.

Regional Outlook

The West Midlands car giant JLR has appointed its [new chief executive](#), the former boss of French car-maker, Renault. Thierry Bolloré was ousted from Renault following the Carlos Ghosn scandal. He goes in to the role in difficult circumstances, with JLR posting a loss of £500m in the three months to March before experiencing the very worst of lockdown.

[In the West Midlands](#) there has been a substantial increase in new infections across every constituent member of the WMCA. The local authority of greatest concern is Sandwell, creeping to 9th on the 10 local authorities are areas with highest infection rates. Sandwell is up from 22.9 to 28.7, with 94 new cases. Blackburn with Darwen is at 79.2.

Qualitative Intelligence

Local lockdowns are a cause for concern, as are a lack of support where measures are taken to control local spikes. In the West Midlands Sandwell has recorded a spike in cases.

There was already disquiet about **international travel**, but imposition of quarantine on people returning from Spain may have knock on impacts in delaying a return to offices. There are growing fears of the economic (and health) implications of a second spike.

Restrictions associated with international travel have compounded existing concerns about **international trade**. Uncertainty about the nature of a **future trade deal with the EU** means that it is difficult for businesses/ organisations to factor the UK's future relationship with the EU into economic recovery plans. There is a lack of energy and resource for businesses to prepare in the same way as they did in 2019 for Brexit.

There is also the issue of **changes to the internal market** from 1 January 2021, when hundreds of powers previously exercised at EU level will flow directly to the UK Government and the devolved administrations in Edinburgh, Cardiff, and Belfast. This means that there is a need to set internal market rules between the four nations; there is potential for an amplified shock after the transition period. A [White Paper on the UK Internal Market](#) was published on 16th July.

There are 820,000 people furloughed across the West Midlands, comprising 32% of jobs. **Young people** have been hit disproportionately, in part reflecting their concentration in sectors such as hospitality. Parliamentary constituencies such as Kenilworth and Southam and Stratford-upon-Avon have seen large relative increases (albeit from a low initial base). In Coventry and Warwickshire more generally increasing efforts have been made to retain graduates in the area in recent years. Graduate retention adds to the number of young economically active people in the area. Youth employment schemes in the West Midlands have

benefitted from EU funding, so raising the question of 'what next'?

A fifth of **small businesses** expect business to be worse in the next quarter compared with the current quarter. Nearly a quarter have reduced headcount over the last four months and three-quarters say profits have fallen. Two-thirds of exporting businesses have seen a drop in international sales. There have been a record number of enquiries to legal helplines about redundancies.

In **manufacturing** there is a rise in employers thinking about redundancies. There is a call for an extension to the furlough scheme for the automotive and the aerospace sectors which have long supply chains in the region. Some manufacturing and engineering companies are reporting new orders.

There is an increasing interest in **AI** and calls for AI to be integrated into the curriculum. AI has a role to play in levelling up. China has invested a great deal in AI recently.

Logistics costs and lead times are increasing. Premium payments are becoming necessary to ensure delivery times for freight.

On a positive note, intelligence suggests that footfall for **reopened restaurants** in local centres (outside the main city centres) has been quite strong.

The impact of the Covid-19 crisis on women

[Anne Green](#), WMREDI

Introduction

This commentary draws in particular on two reports relating to the impact of Covid-19 on women and with a particular focus on the West Midlands. The first report from the [Women's Budget Group looks at the gendered impact of the Covid-19 crisis on women in the UK](#), drawing on insights from frontline organisations in Coventry. The second report draws on polling with just over one thousand women in the West Midlands between 23 June and 1 July 2020 conducted by [Savanta ComRes for West Midlands Women's Voice with 1,017 women in the West Midlands examining their attitudes and experiences in the Covid-19 crisis](#). (The data from the survey are weighted to be representative of population by age, ethnicity, and sub-region.)

Women – particularly women from a BAME group - on the frontline of the Covid-19 crisis

In the West Midlands region women constitute four in five workers in the NHS (79%) and over two in five NHS workers are from a background other than White British. Nationally and regionally the vast majority of social care staff are women: in Coventry the proportion is 84% which is similar to the national average.

National analysis shows that women dominate in several of the [occupations with closest proximity and highest exposure to Covid-19](#). Women comprise 89% of nurses, 81% of nursing auxiliaries and assistants, more than 95% of dental nurses and 84% of care workers and home carers. [Women from BAME groups are over-represented](#) in the majority of these occupations.

Women in the care sector are amongst the lowest paid workers. Moreover, [32% of workers in social care in Coventry are on zero hours contracts](#) and hence their pay could be variable.

Others are likely to be agency workers without entitlement to sick pay. Hence a significant proportion of these women are likely to be agency workers without entitlement to sick pay. Hence a significant proportion of these women are likely to be vulnerable to precarity and poverty.

[Analyses of a survey conducted on behalf of the Fawcett Society](#) underscores the health and economic risk faced by BAME women. 43% of BAME women expected to struggle to make ends meet and to be in more debt than before the pandemic. 24% of BAME mothers reported that they were struggling to feed their children.

Changes in women's employment in the Covid-19 crisis

The gendered distribution of care responsibilities are having an impact on women's employment during the Covid-19 crisis. [Analyses undertaken by the Institute for Fiscal Studies](#) in May 2020 indicated that at that stage of the crisis 16% of mothers had lost their job permanently (compared with 11% of fathers) and 34% of mothers had been furloughed (compared with 30% of fathers).

Of the women in the West Midlands surveyed in late June 2020 four out of five who were working had seen their job change in some way as a result of the Covid-19 crisis. 28% had seen a change in their hours worked, with two in every three of these reporting a reduction in hours worked. 25% had experience a change in location of work, with 92% of these reporting that they were working from home. Women working full-time were more likely to report this change than those working part-time. Other changes reported concerned pay and job role. Furlough has disproportionately affected those in economically weaker positions, with one in three respondents from social grades D and E experiencing furlough compared to one in seven from social grades A and B.

Unpaid work

[Research from the University of Bristol on the gender division of childcare during the Covid-19 crisis](#) published in May 2020 and referred to in the report from the Women’s Budget Group indicated that mothers nationally are doing 50% (or two hours a day) more childcare than fathers.

For most parents the Covid-19 pandemic impacted on usual childcare arrangements, with nurseries and schools closed (and not due to re-open fully until September 2020 in most cases) and informal childcare from family or friends affected by social distancing rules. [Institute for Fiscal Studies’ analyses](#) indicate that mothers are facing the brunt of competing demands on their time, with only half of their paid work time uninterrupted (compared to 70% for fathers).

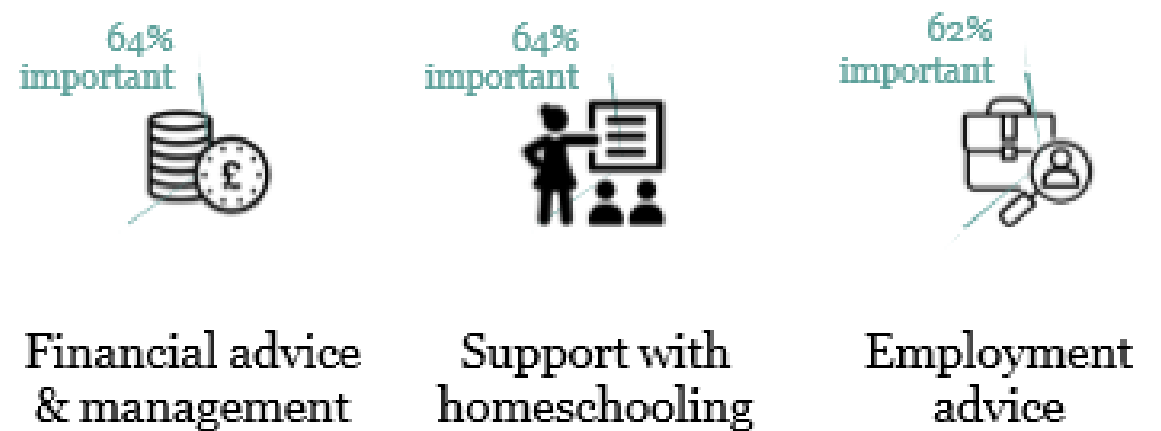
The unavailability and unaffordability of formal childcare – as some nurseries close and incomes for some households are reduced – have particular implications for mothers’ employment. Possible local lockdowns/ a second wave of Covid-19 will likely exacerbate the situation.

Only just over half (53%) of employed women in the West Midlands who would otherwise be able to work from home report that they have broadband of adequate quality to work from home, so inhibiting the option of working from home. This proportion rises to 68% for women in social grades A and B and falls below 50% for those in social grades D and E.

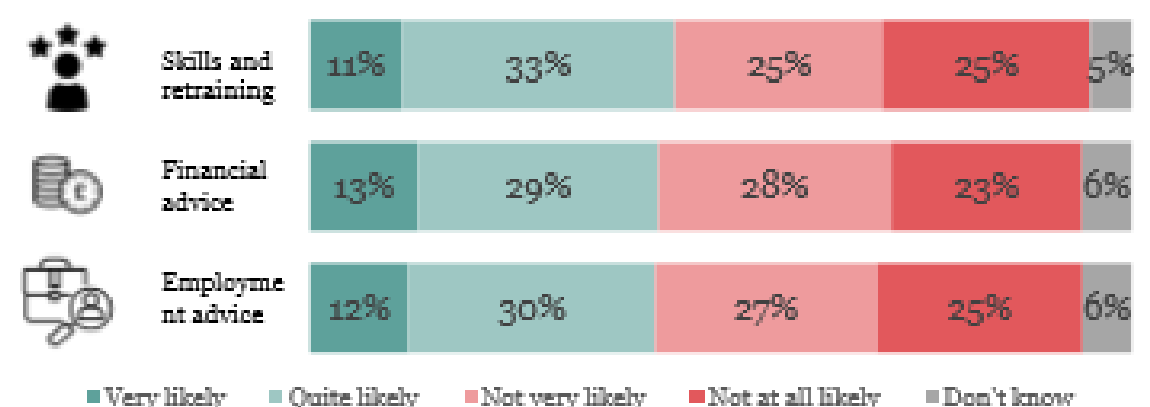
The future economic and health challenges facing women in the face of the Covid-19 are underlined by a deterioration in well-being. Women surveyed in the West Midlands were twice as likely to report that their self-confidence had worsened rather than improved over the period from March to June. However, looking ahead, nearly half of women have given some thought to retaining or upskilling in the field of health and social care (47%) in the wake of Covid-19. By comparison 33% had considered retraining or upskilling in the field of science and technology.

The **types of services** women in the West Midlands say they want and would use are summarised in the infographic below. Financial advice, employment advice/ support with skills and retraining are particularly prominent.

Most women believe it is important for their local authority or regional (combined) authority to provide services related to employment, childcare and finances to people like themselves throughout the Covid-19 pandemic



About two in five women indicate that they are likely to use these services if they were available



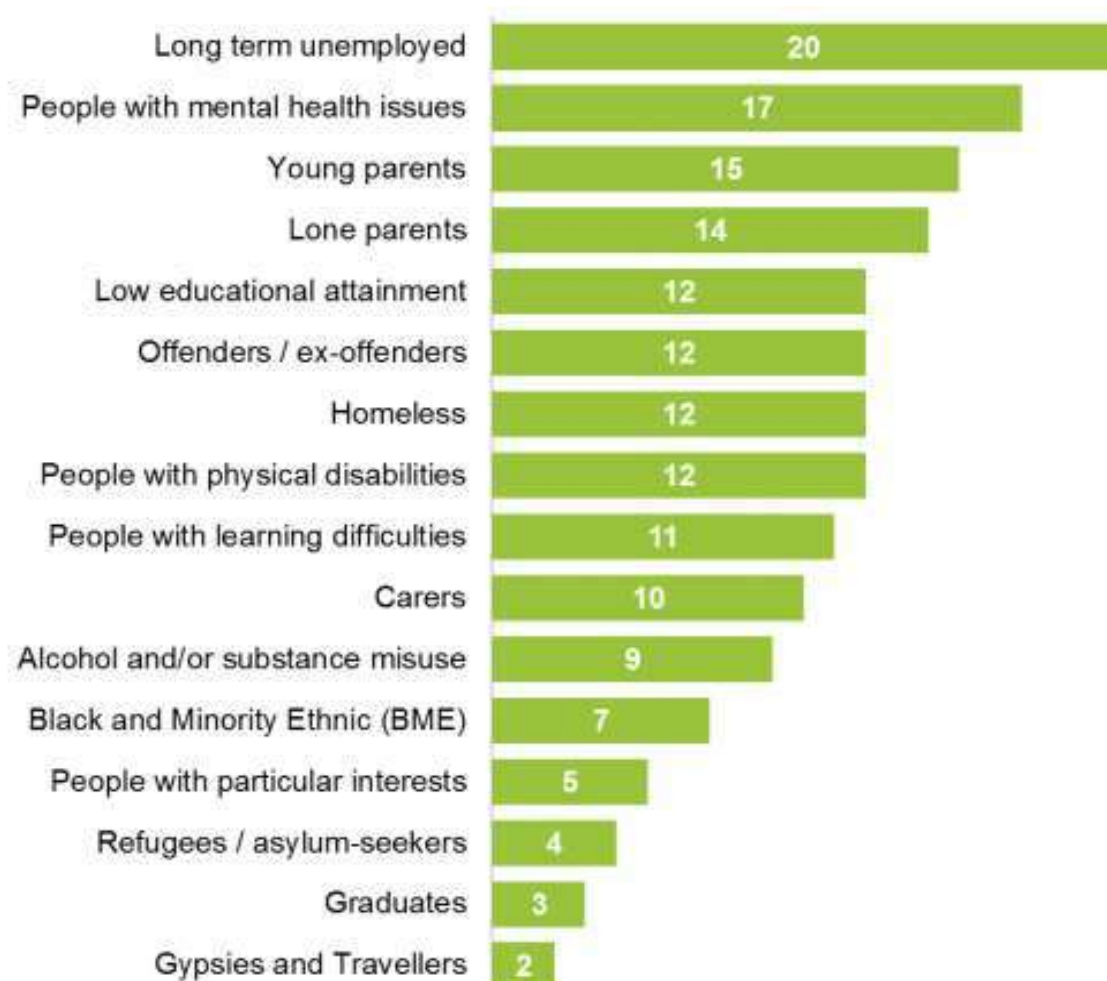
Helping NEET young people towards and into employment: learning from Talent Match

[Anne Green](#), WMREDI

In July 2020 [the final assessment of the £108 million National Lottery-funded five-year Talent Match programme](#) was published. This is significant because the Talent Match programme was set up in response to the rise in unemployment in the last recession and so provides important learning for the contemporary situation. (At a personal level it has afforded the opportunity for me to work in partnership with colleagues at Sheffield Hallam, Warwick and Cambridge on the National Evaluation of Talent Match from start to finish.)

About Talent Match ...

At a time of rising unemployment the focus of attention often turns to young people who are newly unemployed. Talent Match was different. It aimed to support young people aged 18-24 years, especially those who were furthest from the labour market (and sometimes 'hidden' from mainstream support) towards sustainable employment and fulfilling lives. The sub-groups targeted across the different local partnerships are outlined below, with the long-term unemployed and young people with mental health issues particularly prominent.



Base: 20
Source: Partnership Survey 2018

The approach adopted was inspired by a belief in people-powered change and the ability of young people to improve their own circumstances and life chances with the right support. This target and focus is important as there is a danger in current economic circumstances that this group is forgotten and their potential contribution overlooked.

... and how it was distinctive

Talent Match was not a national mandatory programme (like the Work Programme, which operated at the time). Rather it was a voluntary programme, delivered in 21 local partnership areas across England, with local co-ordination from voluntary sector organisations. In the WMCA area there were separate Talent Match Partnerships in the Black Country, Greater Birmingham and Solihull, and Coventry and Warwickshire, along with Staffordshire and the Marches from the wider West Midlands.

The programme adopted a 'test and learn' approach, designed explicitly to provide partnerships with the scope to develop and adapt bespoke solutions, responding to local priorities and opportunities. One of the most innovative aspects of the programme was that it was co-designed and co-delivered with young people, who also benefitted by coming together in social activities and from peer support. Underlying this foundational principle was a belief in people-powered change and the ability of young people to improve their own circumstances and life chances with the right support.

The final assessment showed that those young people who were most involved in wider Talent Match activities improved their confidence, reliability and team-working skills and were more likely to enter formal education, secure an apprenticeship or work placement or take up volunteering than those who were not involved. Young people had **representation** in the programme. [Their involvement](#) in partnerships boards, groups and in delivery gave them voice and enhanced the legitimacy of the programme. It also improved the quality of the services delivered.

Their **lived experience** of the realities of unemployment helped to shape programme design and implementation. The young people involved experienced **direct benefits** through increasing confidence, enhanced understanding of partnership working and in finding employment. This suggests that **beneficiary involvement** needs to be an integral part of future programmes.

Talent Match services

The types of services provided by Talent Match to young people (either directly or via referral to specialist organisations) were an initial assessment; development of an individualised plan; information, advice and guidance (IAG); basic skills (e.g. literacy and numeracy provision); soft skills (including confidence building); employability skills; peer mentoring; therapeutic support; specialist support; and job search support.

Pre-employment advice and support included short-term work experience and work placements to give an initial experience of employment; structured volunteering; and (to a lesser extent) internships. Most local partnerships performed some form of job brokerage - linking beneficiaries to labour market opportunities.

Key workers and a person-centred approach

Typically, [key workers](#) worked with Talent Match beneficiaries on an individual basis, combining youth work and careers guidance approaches, supporting them on employment and non-employment issues. The approach adopted may be characterised as relational. The final assessment of the programme concluded that there were clear benefits of taking a holistic and person-centred approach to supporting young people as they [progressed](#) towards their goals – including before entry, on entry and when [in work](#). This is especially the case for those young people who are most distant from the labour market.

Talent Match in statistics

By the end of December 2018 when the programme finished 25,885 young people had been supported by Talent Match. This is 93% of the planned beneficiary caseload. 38% of Talent Match beneficiaries were from the 10% most deprived areas in England (as measured by the Index of Deprivation). 11,940 (46%) of beneficiaries secured some form of job, including 4,479 (17%) who secured sustained employment or self-employment.

The [impact evaluation](#) showed high reported levels of job satisfaction, improved wellbeing and a positive social benefit with at least £3.08 of public value generated for every £1 spent on the programme.

Local level support for the long-term

The final assessment of Talent Match highlights the value of investment in co-ordinated and collaborative local [youth employment partnerships](#) – involving local authorities, Jobcentre Plus, voluntary organisations and employers/ employer organisations. Building adaptable and resilient local employment support ecosystems is important for dealing with the challenges of the Covid-19 crisis.

Covid-19 Impact on Apprenticeship Supply and Demand Trends

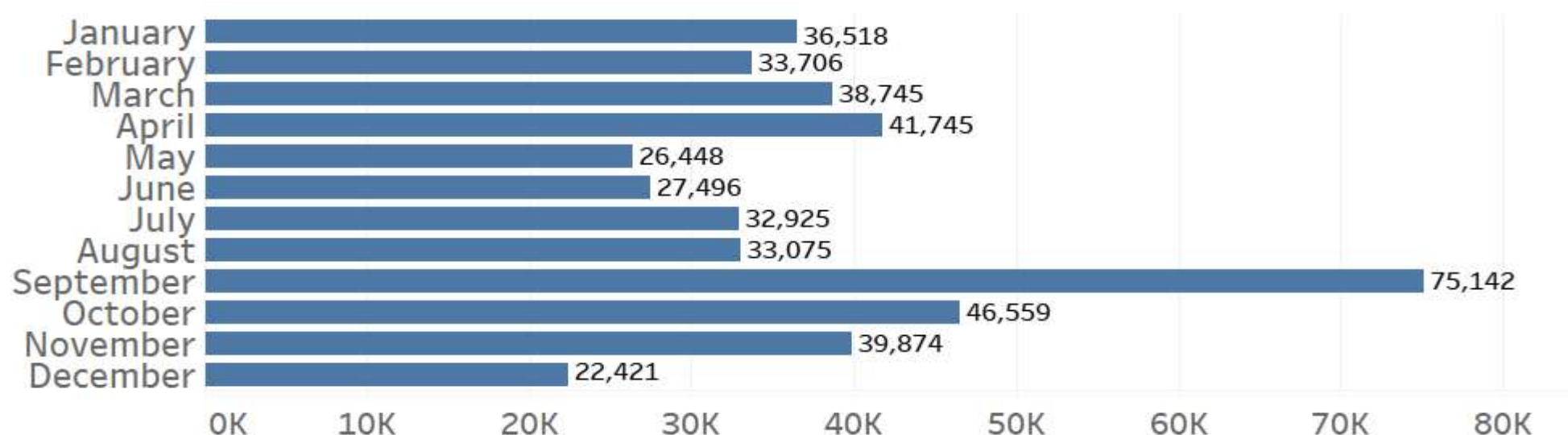
Alex Smith, ODA, WMCA and Scott Grindey, Black Country Consortium

Policy context

Apprenticeships are a central element in the Government's strategy to improve skills and jobs. In the July 2020 Plan for Jobs the Government announced payments for employers who hire new apprentices. A new payment of £2,000 to employers for each new apprentice they hire aged under 25, and a £1,500 payment for each new apprentice they hire aged 25 and over, will be available from 1st August 2020 to 31st January 2021. These payments are additional to the £1,000 incentive already in place for employers to take on 16 to 18 year old apprentices, and those under 25 years of age with an education, health and care plan.

COVID-19 impact on apprenticeship supply trends

Monthly fluctuations (see chart below), based on average England-wide apprenticeship starts from 2014/15 to 2018/19 indicate that more apprentices are recruited through September and October than in other months. This presents the risk that if recruitment remains muted in the next few months, we will see a very sharp year-on-year decline.



Period	England	3LEP	Black Country	GBS	C&W
2016/17	489,100	42,500	13,590	20,690	9,330
2017/18	371,200	29,270	9,430	13,760	6,830
2018/19	389,600	31,750	10,280	15,130	7,090
Q1/2 2019/20	198,630	15,520	4,840	7,260	3,420
Q3 2019/20	73,260	5,410	1,830	2,450	1,130

The pattern of decline in apprenticeship starts is apparent since the introduction of the Apprenticeship Levy. A partial recovery can be seen in 2018/19 before the onset of the pandemic, with 31,750 apprenticeship starts, up from 29,270 in 2017/18 (as shown in the Table below).

Academic year 2019/20

The latest available apprenticeship data comprises the first three quarters of this academic year (August 2019 – April 2020). Around a third as many apprentices were recruited in January-April 2020 than in the prior two quarters. While separate data for the first two quarters of this academic year (August 2019 – January 2020) are not available, this decrease indicates a sharp decline in recruitment across the region, comparable to the UK. This decline occurred across apprenticeship levels, major subject categories, and age groups.

Implications for Equity

Research by the Sutton Trust suggested that the COVID-19 crisis may lead to apprenticeships being more concentrated in larger firms that are better able to retain their apprentices and continue to recruit. This may have a geographical effect in making opportunities less available across the region. Those from more deprived areas were also more impacted by the decline in apprenticeship numbers in previous years, according to this research, with a fall of **36%** versus **23%** for more privileged apprentices.

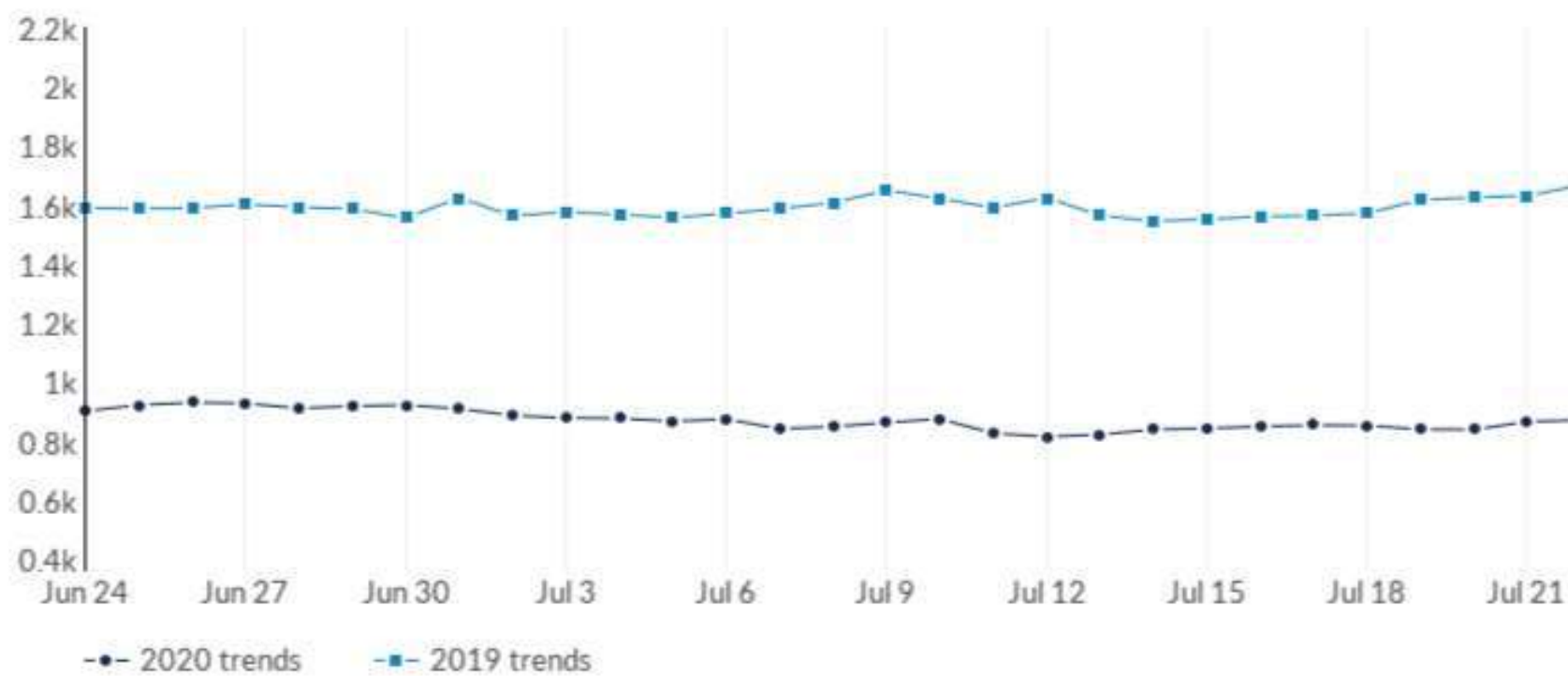
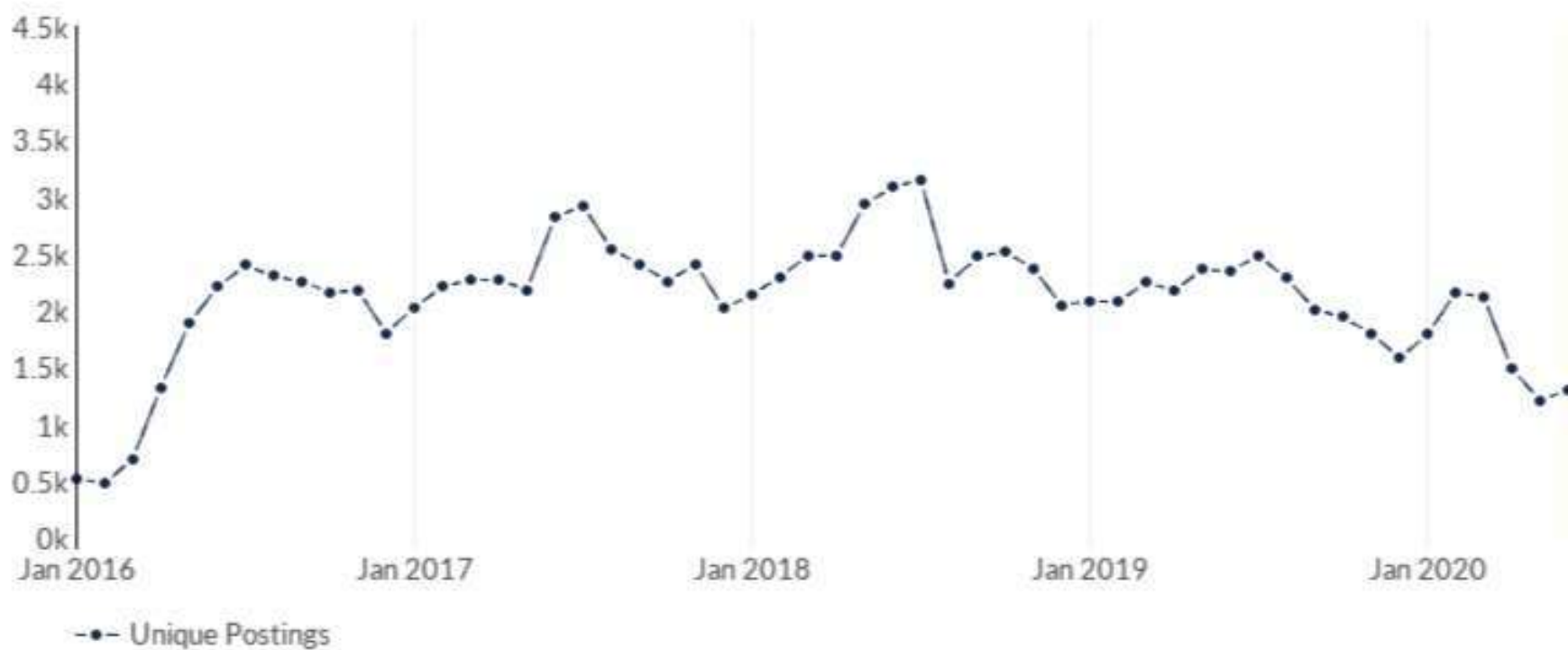
Demand for apprenticeships

There was a total of 5,624 apprenticeship job postings across the WMCA three LEP geography in June 2020 compared to 5,598 in May and 10,601 in June 2019.

Of the total apprenticeship postings in June 2020, 1,300 were unique vacancies. This is up 8.0% from May 2020 but down -44.6% compared to the same period last year. This give a Posting Intensity of 4-to-1, meaning that for every 4 postings there is 1 unique job posting. This is lower than the Posting Intensity for all other occupations in the region (7-to-1), indicating weaker demand from employers for apprenticeships.

While the first graph below shows the trend in unique postings from January 2016 to June 2020, the second shows the most recent 30 days of unique job postings for apprenticeships (in order to demonstrate the near term trend), compared with the same period in 2019. The near-term trend (24 June 2020 to 23 July 2020) shows that the number of apprenticeship job postings continues to significantly lag behind the same comparable period in 2019. The gap in apprenticeship postings at the start of this 30-day period was down -43.3%.

Unique Postings Trend



The table below identifies the Top 10 most posted apprenticeship occupations in June 2020.

Top Posted Occupations

Occupation (SOC)	Total/Unique (Jun 2020)	Posting Intensity	Median Posting Duration
Other administrative occupations n.e.c.	501 / 167	3 : 1	85 days
Nursery nurses and assistants	407 / 99	4 : 1	124 days
Engineering technicians	175 / 85	2 : 1	100 days
Managers and directors in storage and warehousing	477 / 73	7 : 1	n/a
Hairdressers and barbers	137 / 60	2 : 1	152 days
Science, engineering and production technicians n.e.c.	262 / 51	5 : 1	96 days
IT user support technicians	242 / 38	6 : 1	60 days
Human resources administrative occupations	119 / 35	3 : 1	96 days
Teaching assistants	63 / 35	2 : 1	17 days
Vocational and industrial trainers and instructors	250 / 34	7 : 1	13 days

Geographical and Social Mobility

[Anne Green](#), WMREDI

Introduction

On 23rd July the Social Mobility Commission published an important report entitled '[Moving Out to Move On](#)' investigating the link between internal migration in Britain, disadvantage and social mobility. These are important issues for analysts in the light of the Covid-19 crisis and concerns about a K-shaped recovery. The links between location and the geography of opportunity structures have long been of interest to geographers and local economic development analysts. The [quantity and quality of jobs available locally is of particular importance for those with poor skills](#) because they have fewer opportunities and face more constraints in the labour market.

There are also longstanding concerns about a mismatch between individuals' perceptions of jobs that are physically accessible to them and those that are within reach. In the early 1980s Derek Quinn from the Transportation and Engineering Department at West Midlands County Council investigated unemployed [school-leavers' familiarity with locations within Birmingham and decisions made in the process of job search](#). His analysis showed that there were accessible parts of the city where there were vacancies, but groups of school leavers neither considered nor applied for them. He cited a lack of cross-city bus routes constraining knowledge beyond the city centre as an influencing factor. Later research investigating [place attachment, social networks and mobility](#), used 'mental maps' to gain insights into young people's knowledge of their local area also highlighted how perceived opportunities are a subset of objective opportunities and how place attachment influences aspirations. These analyses underscore how limited spatial horizons can check social mobility.

So does geographical mobility have a positive association with social mobility?

Geographical mobility and accelerated social mobility: the 'escalator region' concept

In the early 1990s Tony Fielding coined the term 'escalator region' to describe how London and the South East acted as an 'upward social class escalator' in the British urban and regional system. Using data for the 1970s. He outlined how it attracts to itself, through inter-regional migration, a more than proportional share of the potentially upwardly mobile young adults – these are the people 'stepping on' the escalator. Then he illustrated how they 'rode up' the escalator, in that London and the South East promoted these young people, along with its own young adults, at rates higher than elsewhere in the country.

Subsequently Tony Champion and Ian Gordon have extended the analyses for three subsequent decennial periods: 1981-1991, 1991-2001 and 2001-2011. Their results showed that London and the Greater South East continued to perform in the way originally conceived by Tony Fielding. It continued to receive a large influx of younger working age people who exhibited stronger upward social mobility than longer-term residents, who in turn had higher progression rates than those elsewhere. As such, they confirmed that it could be seen as a 'deep structural' process.

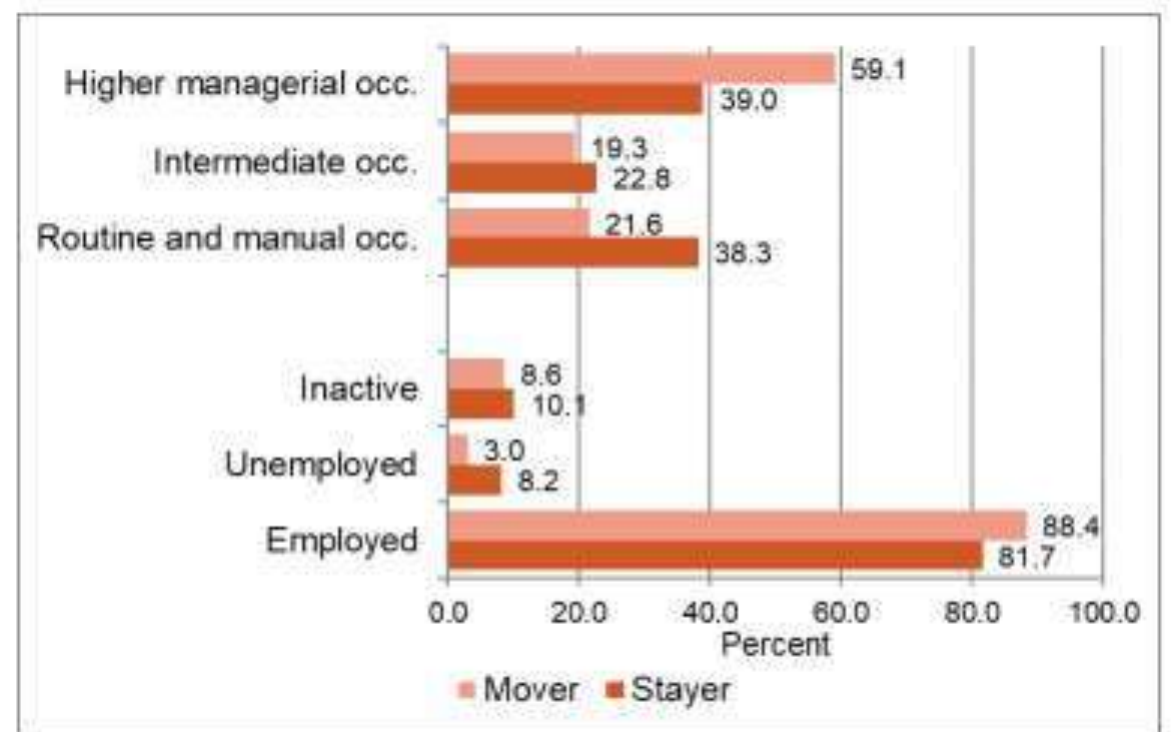
But in the period from 2001 to 2011 they found that it did not operate as strongly as in the 1990s either in terms of the career progression gained by its in-migrants or the extent of its advantage over the next largest cities (including Birmingham). There are several possible explanations for the slowdown in the first decade of the 21st century. The first is an increase in immigration to London and the South East resulting in fewer opportunities for internal migrants from the rest of the country. A second is an increase in the number of graduates to take up job opportunities. A third explanation is an improvement in opportunities for career advancement in second tier cities, which bodes well for graduate attraction and retention. However, these analyses go up to 2011 only

So what does the picture look like incorporating more recent evidence on geographical mobility - and its relationship with social mobility?

Research by Michael Thomas on the [motives for internal migration in Britain](#) using geo-coded micro data highlights that the propensity to undertake employment- and education-related migration is highest amongst the young and highly educated. This fits with expectations from human capital models of migration. Traditionally longer distance moves have been associated with employment-related migration. Although employment and education related motives account for a greater share of longer distance than shorter distance moves, they account for a minority of total migration events over 40 kilometres and family motives are equally important. This emphasises how a mix of factors influence migration decisions.

The '[Moving Out to Move On](#)' report published in July 2020 is distinctive in its concentration on deprived areas and moves from and to them. In the report 'movers' are defined as those living as adults in a different area to the one where they grew up. These 'movers' are contrasted with 'stayers' who remained in the area where they grew up. The focus of the statistical analysis element of the mixed methods study (which also incorporates interviews, focus groups and roundtable discussions with stakeholders) is on whether movers have better employment outcomes compared with people who did not migrate and whether migration from deprived areas is higher or lower than migration from more advantaged ones.

Key findings confirm that the early 20s is the peak age for moves. In this age group moves to study and to find work dominate. Movers are more likely to have higher educational levels: 56% of movers have a degree compared with 36% of stayers. Movers are more likely to be employed and less likely to be unemployed. They are also more likely to be in higher managerial occupations and less likely to be in routine and manual occupations (as shown in the chart below which depicts employment outcomes by migrant status).



Source: British Household Panel Survey and Understanding Society, 2000 to 2019

In accordance with the concept of the escalator region, movers outperform stayers when taking account of socio-economic background: 47% of movers from a routine and manual socio-economic background work in higher managerial or professional occupations, compared with 30% of stayers from a similar background. Yet economic gains moving are greatest for those from most deprived areas.

In general, better off people move to better off areas, while poorer people move to poorer areas. This compounds social and geographical differentials.

Housing affordability is a key factor constraining stayers from moving. Yet stayers cite quality of life, personal connections and low living costs as benefits of staying.

A trend to lower geographical mobility?

Many factors drive geographical migration within countries. Anne Green identifies [five main groups of drivers: \(1\) changing demography, \(2\) macro-economic and labour market factors, \(3\) technological developments, \(4\) societal and non-economic considerations and \(5\) other markets, regulatory and institutional structures](#). These drivers sometimes pull in the same direction and sometimes work against each other. Whereas some, such as ageing, unambiguously reduce migration, others, like technological change, simultaneously enable mobility and immobility.

The increasing heterogeneity within demographic and economic sub-groups of the population, technology-enabled separation of economic activities across geographical areas alongside the extended reach and penetration of social networks suggest that understanding how drivers play out in practice is far from simple. Migration is not just an individual decision, but involves trade-offs at household level. Life events and housing considerations are also important.

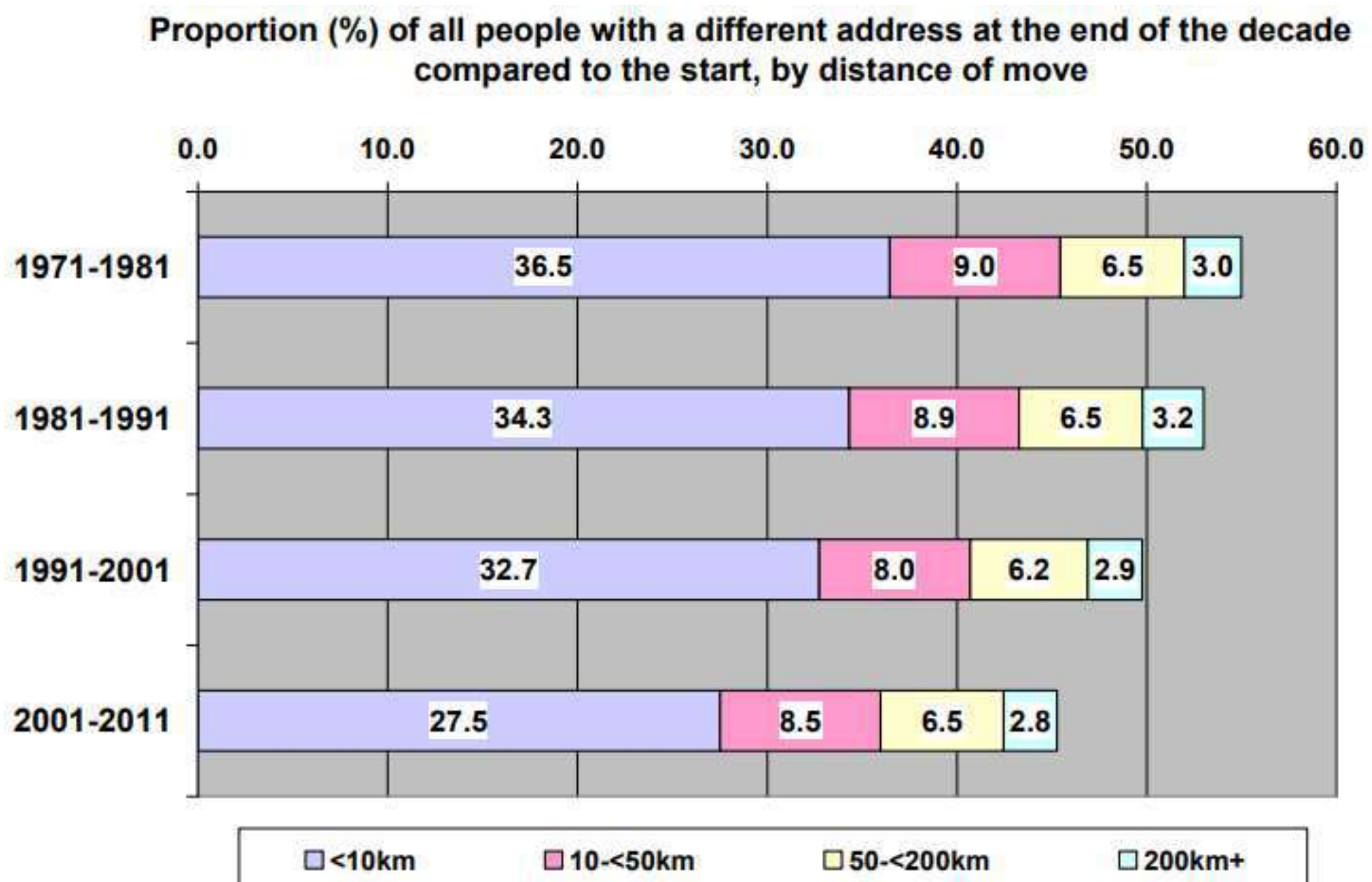
Analyses by Ian Shuttleworth, Tony Champion and colleagues point to a [slowing of internal migration](#) in England and Wales. As the chart below shows, the proportion of people changing at least once in a decennial period reduced from 55% in 1971-81 to 45% in 2001-2011. A decrease in short distance moves accounts for most of the reduction. Moves to and from higher education have helped maintain longer-distance moves, so highlighting the importance of moves involving higher education in understanding geographical mobility over longer distances.

International evidence also points to declining internal migration. This is most evident in the USA – where the rise in rootedness it is evident across all distance categories. It is evident in Canada and Australia – particularly at long distances. In Europe the picture is mixed, varying between countries.

A reduction in internal migration brings both positive and negative features. More stable communities and greater social capital are pluses. However, this may be at the expense of more closed attitudes; geographical mobility is associated with open attitudes. On the negative side of the balance sheet, a slowdown of geographical mobility may also mean less social mobility and entrenchment of spatial differences.

Policy suggestions

The '[Moving Out to Move On](#)' highlighted four policy suggestions to help build better outcomes for people in deprived areas and improve local fortunes more generally.



Source: Calculated from ONS Longitudinal Study. Crown copyright.

First, it suggests the universities and colleges should work together to ensure local areas have a coherent and flexible offer for school leavers. Here it is important to recognise that [routes into and from further/ higher education and into employment are less clear for those leaving school with fewer qualifications](#) than for those who have performed well academically and where pathways are more established. Colleges and universities also have a role in helping to tackle social and financial barriers faced by those from less advantaged backgrounds who move to study. The [Office for Students is active in funding knowledge exchange activities](#) that facilitate engagement of students with local businesses/ organisations, with a particular focus on students from disadvantaged backgrounds to help ensure better outcomes. Putting in place an offer for young people leaving school/ college/ university and those seeking employment in summer 2020 are important. [New research from the Sutton Trust](#) indicates that 46% of undergraduates considered that Covid-19 had a negative impact on their ability to gain graduate employment. 61% of surveyed employers are cancelling some or all of their placements. 48% of organisations responded that surveyed think there will be fewer of these opportunities in their businesses over the next year. The importance of internships (and similar opportunities) is evidenced by [earlier Sutton Trust research](#) which found that 46% of young graduates under 24 years had taken up at least one internship.

Secondly, the report highlights that employers and local authorities should work together to identify and correct mismatches between local skills and local needs. Employers can extend and diversify their talent pool by recruiting both locally and further afield by facilitating flexible working – so that opportunity becomes less reliant on geography.

Thirdly, in order to facilitate geographical mobility and the connectivity of people to opportunities it suggests that local leaders should prioritise digital infrastructure and skills, transport connections and good quality affordable housing. Such policies are important in enhancing place attractiveness.

Fourthly, the report highlights the importance of developing pride in place, including through local leaders working with community groups.

How will geographical and social mobility evolve going forward? Implications of the Covid-19 crisis

The evidence suggests internal migration is declining over the longer-term. Technology-enabled home working for some people – particularly the highly qualified who drive geographical mobility for education and employment – has shown more people that they can work from home, at least for some of the time. This might suggest that the Covid-19 crisis acts as a further driver for less employment-related internal migration in Britain, so accentuating current trends. Family and amenity factors might then play a more important role in driving migration decisions and the choice of where to live and shifting residential preferences are important here. Nevertheless, being able to travel to work say two-three days per week is likely to be important for some people. This means that place attractiveness – which comprises the economic, housing, cultural and environmental offer – becomes more important for local and regional economies, in terms of both retaining and attracting people.

Does less migration mean reduced social mobility - especially in the face of geographical inequalities in the quantity and quality of opportunities? Resource constraints given the competing pressures on spending posed by the Covid-19 crisis, at least in the short-term, may reduce prospects for targeted policies aimed at improving social mobility and the geographical distribution of opportunities over the short-term although the 'levelling up' agenda is important in this space. Evidence suggests that internal migration is already on the decline. Will the escalator that has operated to enhance social mobility of movers slow, stop or even go into reverse? Or will opportunity be less reliant on geography than in the past?

As discussed, the escalator has become entrenched in the British urban and regional system.

If, in 2020, fewer young people move away from home areas to pursue educational opportunities at universities this has implications for geographical mobility - not just in the short-term but also in the longer-term, given that migration is not just a 'one off' event but rather shapes future behaviours, and of their families, over the life course. So fewer undergraduates moving away in the first instance and more opting for local work has implications for the future too. In the short-term it may mean a larger talent pool on which some local economies can draw. Conventionally graduate retention is interpreted as a 'good thing' for local economies.

But there can be advantages, both locally and nationally, of geographical mobility involving the young highly qualified getting on and riding the escalator in the early stages of their careers in another region and then stepping off the escalator and bringing their skills and experience back to their areas where they originated once their careers are established. This suggests that local and regional economies need to make places attractive for people at all stages of the life course.

Brexit and immigration policy adds to the complexity. Fewer international migrants competing for jobs – especially in London and the Greater South East – could open up the potential for more geographical mobility given that international migration has been cited as filling some of the opportunities that might have been taken previously by internal migrants.

Finally, voluntary job changing is positively associated with economic buoyancy. The economic downturn associated with the Covid-19 crisis could be expected to mean that those in employment are more reluctant to change jobs while for those seeking employment competition intensifies. It is hard to achieve social mobility in a depressed labour market.

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Economic Recovery Post COVID-19: The MIT Regional Entrepreneurship Acceleration Programme (REAP)

[Chloe Billing and Josh Swan](#), WMREDI

About the REAP programme

The West Midlands is involved in adapting the successful Massachusetts Institute of Technology (MIT) [Regional Entrepreneurship Acceleration Program](#) (REAP) to assist UK regions achieve greater productivity, employment and returns from research. REAP will support the region's response to the Covid-19 crisis and help aid economic recovery by deepening collective efforts and further developing a community of practice focusing on entrepreneurship and innovation as they become ever more important.

WMREDI is developing indicators to assess the capability to support Innovation and Entrepreneurship in the West Midlands as part of a regional team of leaders representing entrepreneurs, risk capital providers, corporates, academia, and governments.

The MIT program emphasises the importance of strengthening innovation capacity (**I-Cap**) and entrepreneurial capacity (**E-Cap**) within a region.

Innovation-Capacity (I-Cap)

I-Cap is the ability to develop new to the world innovations from inception through to the market.

It covers not only the development of basic science and research, but also the translation of their 'solutions' into useful products, technologies and services.

Indicators of Strong I-Cap within a region are the presence of: Universities, Central R&D, Network of researchers, Medical Centres.

Entrepreneurship-Capacity (E-Cap)

E-Cap is the ability to start and build new to the world businesses from inception to maturity and includes a subset of more general entrepreneurial capabilities and conditions for forming enterprises. Indicators of Strong E-Cap within a region are: Entrepreneurs, Mentors, Founding Teams, Investment.

Measures that have been associated with strong I-CAP and E-CAP within a region include:

- *Human capital*: the workforce (from within a region, or attracted into a region) with relevant education, training and experience.
- *Funding*: the availability of public and private sector capital to support innovation and entrepreneurship.
- *Infrastructure*: the physical infrastructure (e.g. land, buildings, transport, connectivity) that is needed to support innovation and entrepreneurship at different stages.
- *Demand*: the level and nature of specialised demand for the outputs of innovation and entrepreneurial capacities supplied by different organisations in the system.
- *Culture and Incentives*: the social norms that shape acceptable career choices and the incentives that shape individual team behaviours.

Early findings from the WMCA area participation in REAP have identified the following strengths and weakness.

(A more detailed set of metrics is being prepared. For more information contact [Dr Chloe Billing](#).)

Measure	Strengths	Weaknesses
Human capital	<ul style="list-style-type: none"> • Largest university sector outside London, plus higher and further education colleges with students taking higher education courses. • Improving graduate retention • Higher percentage of engineering / scientist graduates than the UK average • Above average score for Birmingham on the quality of secondary education. (Mixed performance elsewhere in the WMCA area.) 	<ul style="list-style-type: none"> • Lower than average proportion of the population with a degree level qualification – so insufficient graduates trained to sustain the innovative and analytical work behind R&D. • High proportion of the WMCA working-age population with no formal qualifications - raises concerns of a regional skills gap, which does not meet the ‘I-cap demands’ for a supply of skilled people, technicians, researchers and support staff • Need a greater proportion of the working-age population with the required skills and knowledge to start a business.
Funding	<ul style="list-style-type: none"> • The West Midlands is a ‘business-led innovation region’, with above-average levels of private sector investment in R&D • GBSLEP has received significant levels of funding from Horizon2020 and research Council/Innovate UK • GBSLEP is in the top ten LEP areas outside of London, in terms of its success at winning both European and UK research funding. 	<ul style="list-style-type: none"> • 52% of gross domestic expenditure on R&D goes to London, the South East, and East of England regions; in 2018-19, the West Midlands received only 9%. • Danger that the private sector will respond to the better availability of innovation resources and skills elsewhere by relocating their own investment. • In wake of Covid-19 credit providers are more cautious about who to lend to and sales have diminished.
Infrastructure	<ul style="list-style-type: none"> • Good connections to the rest of the UK and international markets – rail, road and air. • Home to a number of high tech business parks that are helping to foster innovative practices and high tech industry. • 96.5% of premises in the WMCA area had access to ultrafast and superfast broadband in 2019 • There is ongoing major infrastructure investment 	<ul style="list-style-type: none"> • Major issue regarding shortfall in affordable housing. • The M6, M5, M42 and M40 are key road linkages that are all part of the region’s Strategic Road Network but some sections have experienced and increase in average delays and some sections are affected by low speeds.
Demand	<ul style="list-style-type: none"> • 3-LEP area has strong representation (relative to the national average) in advanced manufacturing and engineering, the public sector (including education), logistics and transport technologies, and life sciences and health care • Large Business and Professional service sector • West Midlands is the 3rd largest value export region in England 	<ul style="list-style-type: none"> • 12.2% of West Midlands GDP is at risk because of Brexit negative trade-related consequences - the West Midlands as a whole is more exposed than the UK average.
Culture and incentives	<ul style="list-style-type: none"> • Faster than average growth rate in business base. • The WMCA enterprise births per 10,000 population is slightly above the UK average. • High prestige and quality of scientific research (reflected in patents). • Higher than national average proportion of STEM graduates per 1000 people – suggesting attractiveness for people choosing a degree in science and engineering. 	<ul style="list-style-type: none"> • Slightly lower than average enterprise survival rate. • Further research and data collection is needed to understand how culturally accepted entrepreneurship is in the region and the extent to which there are positive or negative incentives.

Measuring the distance to the SDGs in the UK regions. How far is West Midlands region from reaching the Sustainable Development Goals?

Raquel Ortega-Argiles, WMREDI

In September 2015, the General Assembly of the United Nations adopted the 2030 Agenda for Sustainable Development that includes 17 Sustainable Development Goals (SDGs). Building on the principle of "leaving no one behind", the new Agenda emphasises a holistic approach to achieving sustainable development for all on all fronts – social, economic and environmental. The Agenda established the commitment that over the coming years, governments and organisations will redouble their development efforts to create a better future for the planet, ensuring prosperity, inclusivity and sustainability for all.

To analyse the UK regions' disparities in their progress towards the SDG goals and targets, we use the OECD methodology (OECD, 2019). Based on the UN Global List of 244 indicators (United Nations, 2017), this methodology evaluates the distance that OECD countries need to travel to meet SDG targets for which data is currently available. The 17 development goals are grouped into five main groups: people, planet, prosperity, peace and partnership.

The first group "people" includes five SDGs: (1) End poverty in all its forms everywhere; (2) End hunger, achieve food security and improved nutrition and promote sustainable agriculture; (3) Ensure healthy lives and promote well-being for all at all ages; (4) Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all; (5) Achieve gender equality and empower all women and girls.

The second group "planet" includes: (6) Ensuring availability and sustainable management of water and sanitation for all; (12) Ensuring sustainable consumption and production patterns; (13) Take urgent action to combat climate change and its impacts; (14) Conserve and sustainably use the oceans, seas and marine resources for sustainable development; and (15) Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt

biodiversity loss.

The third group "prosperity" includes: (7) Ensure access to affordable, reliable, sustainable and modern energy for all; (8) Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all; (9) Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation; (10) Reduce inequality within and among countries; and, (11) Make cities and human settlements inclusive, safe, resilient and sustainable.

The fourth group "peace" focuses on (16) Promoting peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.

The last group "partnership" is centred on (17) Strengthening the means of implementation and revitalise the global partnership for sustainable development.

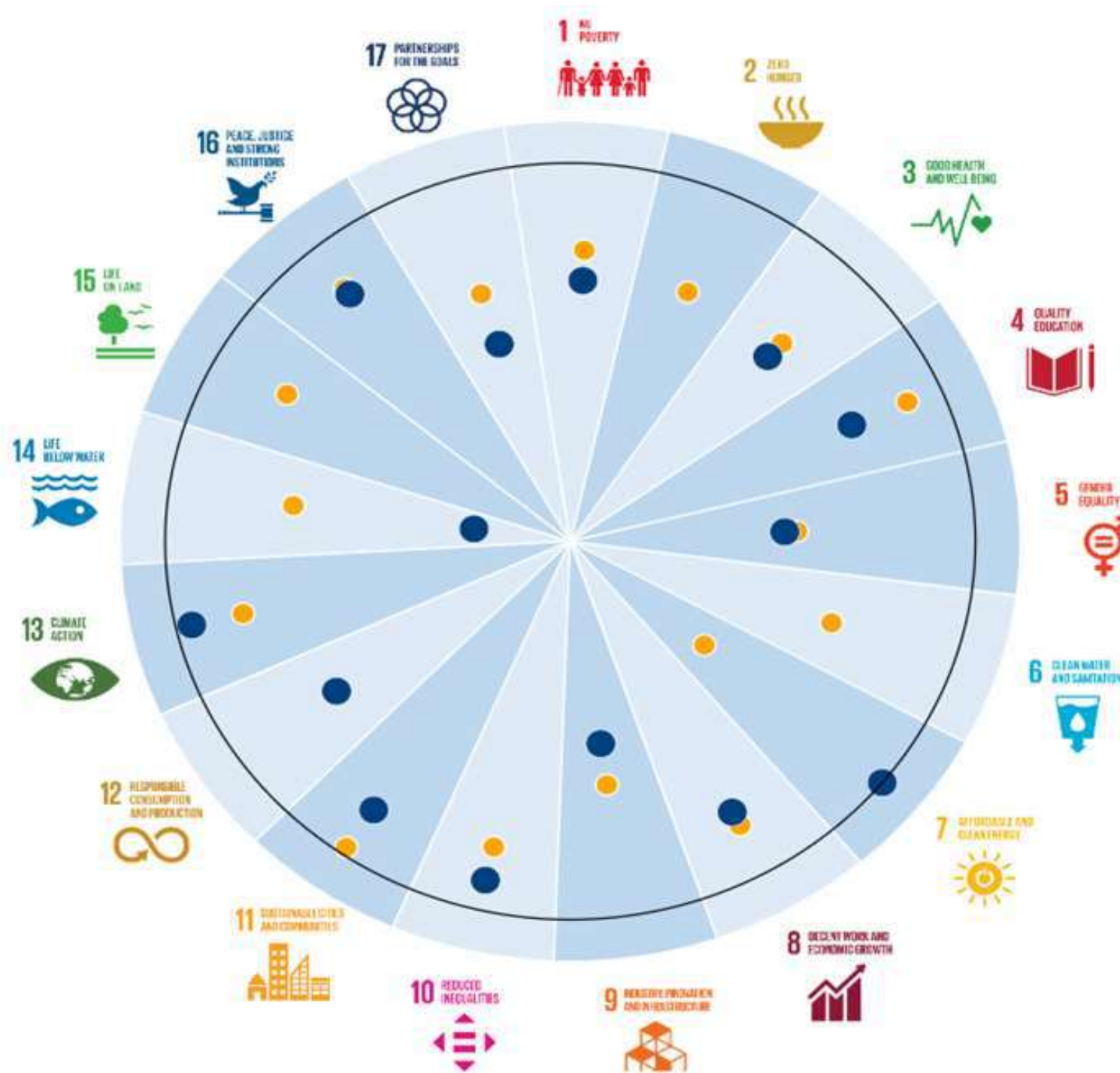
Some of these goals are mainly defined to ensure higher levels of development in the most deprived areas of the world. The holistic or systemic approach of the Agenda illustrates how intertwined the pillars of development are.

Based on 127 available indicators allowing coverage of 102 of the 169 SDG targets, the United Kingdom has currently achieved 17 of the 2030 targets, and many of the remaining distances to targets are relatively small compared with other OECD countries (Figure 2.69 in OECD, 2019). Relative to the OECD, the UK reports a relatively low death rate from traffic accidents (target 3.6), a high participation rate in organised learning (target 4.2) and has achieved target 17.2 on official development assistance. However, the report also indicates that some challenges remain; the UK is still very far (i.e. more than 3 standardised distances away) from meeting 2% of the targets. Among them, for instance, obesity rates are still very high (target 2.2), tobacco consumption is of concern (target 3.a) and policies and practices against illegal, unreported and unregulated fishing could be improved, notably in international co-operation and engagement in cross-country initiatives (target 14.4) (OECD, 2019).

In the figure below, we compare the UK average and the West Midlands region. The closer to the centre, the further away from the SDG target the region is. The West Midlands scores are in blue and the UK scores are in yellow. Concerning the UK regional average, the areas that need more attention are (5) Gender equality and (7) Affordable and clean energy while the UK average seems to score relatively well in the goals (4) Quality Education; (8) Decent work and economic growth; (10) Reduced inequalities; (11) Sustainable cities and communities; (13) Climate action; (15) Life on land; and (16) Peace, justice and strong institutions. The West Midlands region scores lower on various

goals compared to the UK average. The areas that require more attention are (5) Gender equality, (9) Industry, innovation and infrastructure, (14) Life below water and (17) Partnerships for the goals. The region scores higher than the UK average on the goals (7) Affordable, and clean energy; (10) Reduced inequalities and (13) Climate action.

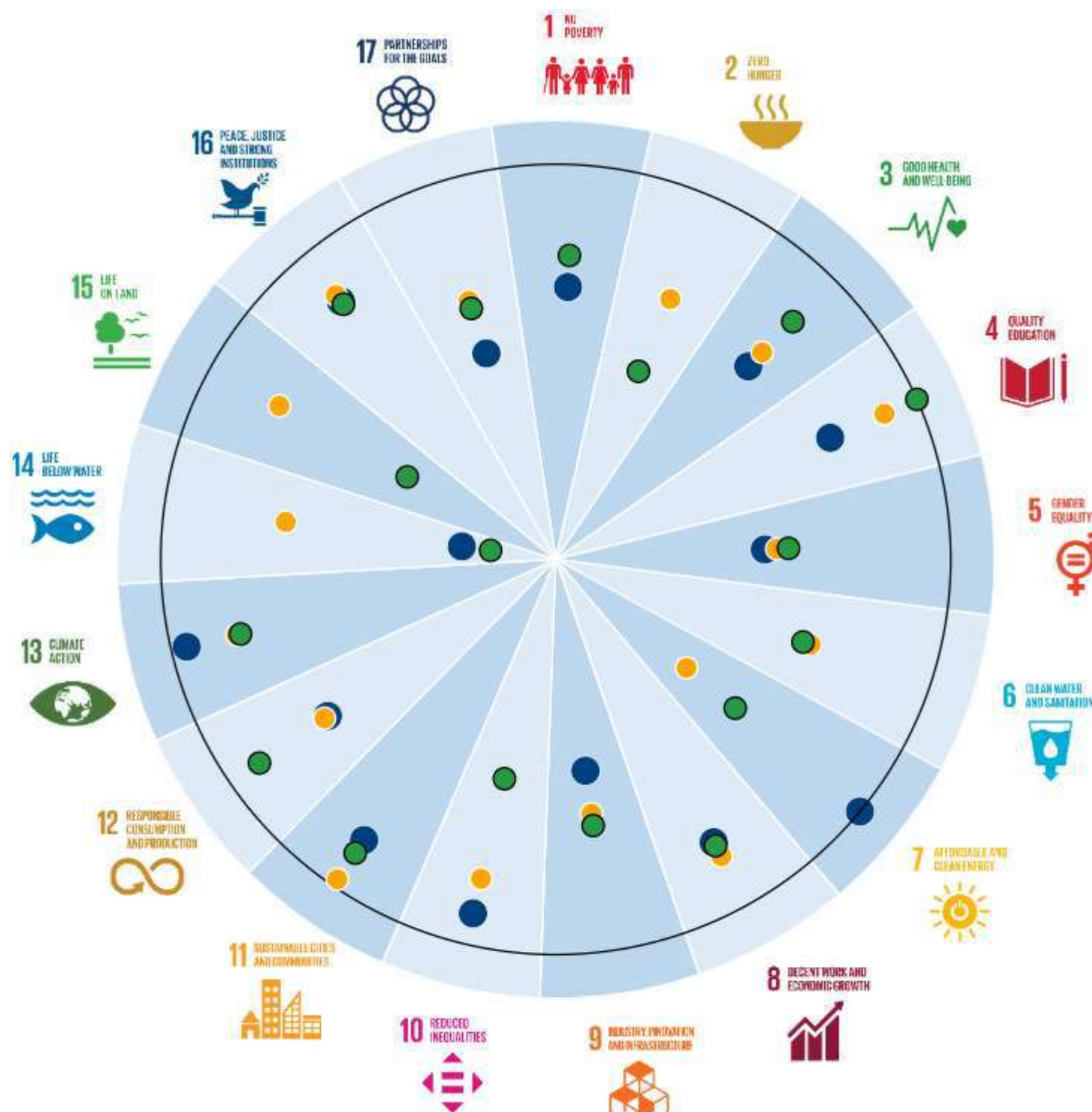
The figure shows **West Midlands and UK Country Average comparison, SDG target distances** - In blue: West Midlands; yellow: Country average.



Source: [OECD Webtool](#) (1) No Poverty; (2) Zero Hunger; (3) Good health and well-being; (4) Quality Education; (5) Gender Equality; (6) Clean water and sanitation; (7) Affordable and clean energy; (8) Decent work and economic growth; (9) Industry, innovation and infrastructure; (10) Reduced inequalities; (11) Sustainable cities and communities; (12) Responsible consumption and production; (13) Climate action; (14) Life below water; (15) Life on land; (16) Peace, justice and strong institutions; (17) Partnerships for the goals

In the figure below, we compare the West Midlands region with the capital region (Greater London) and the UK country average. Greater London (in green) reports higher values than the UK average and West Midlands (in blue) in many different SDGs. West Midlands is closer to the SDG targets (7) Affordable, and clean energy; (10) Reduced

inequalities and (13) Climate action. The **Figure shows West Midlands, Greater London and UK comparison** - In green: Greater London; blue: West Midlands; yellow: Country average

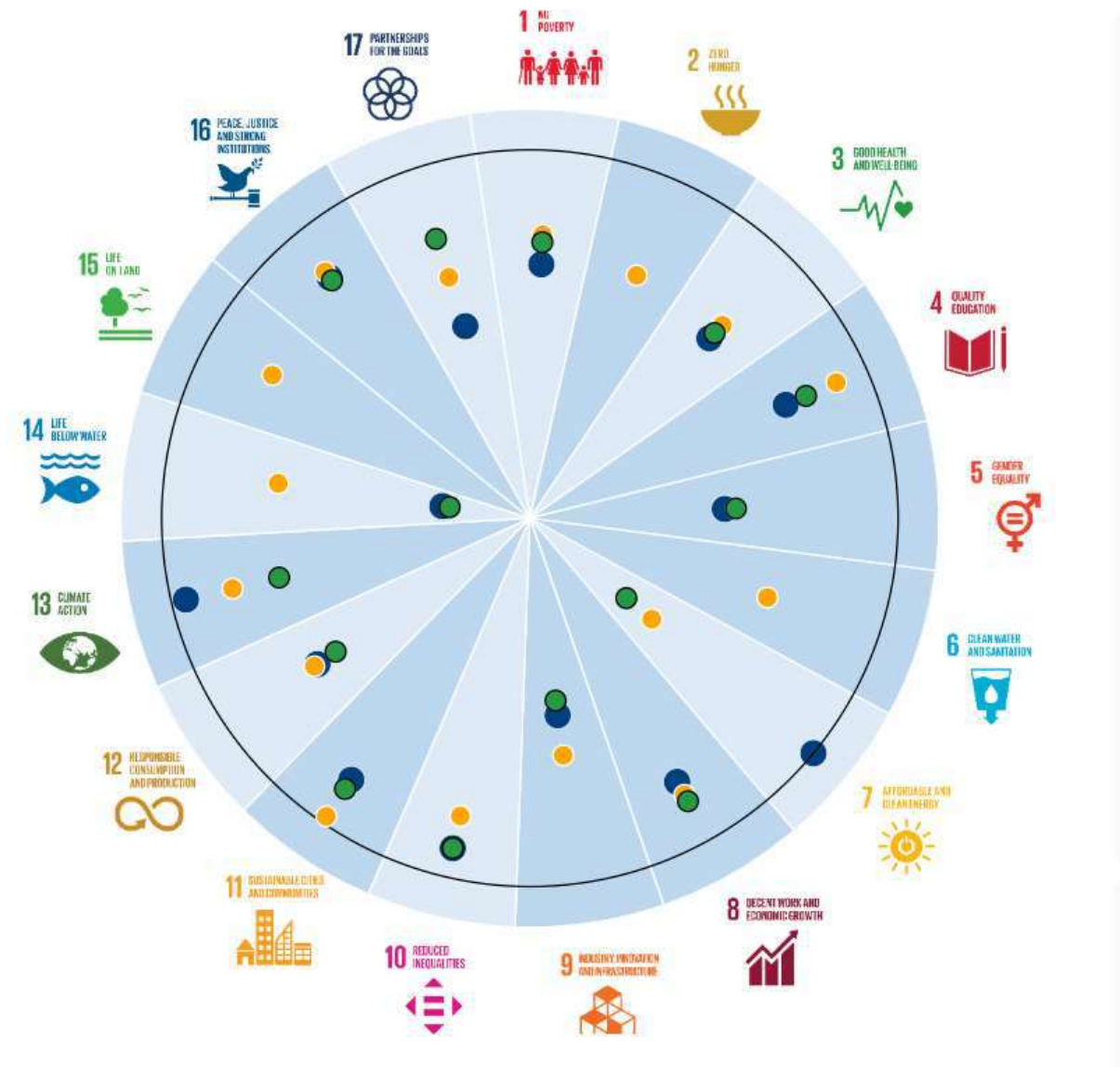


Source: [OECD Webtool](#) (1) No Poverty; (2) Zero Hunger; (3) Good health and well-being; (4) Quality Education; (5) Gender Equality; (6) Clean water and sanitation; (7) Affordable and clean energy; (8) Decent work and economic growth; (9) Industry, innovation and infrastructure; (10) Reduced inequalities; (11) Sustainable cities and communities; (12) Responsible consumption and production; (13) Climate action; (14) Life below water; (15) Life on land; (16) Peace, justice and strong institutions; (17) Partnerships for the goals

In the figure below, when comparing the regions West Midlands (blue) and East Midlands (green), we can observe that they score relatively similarly in many different targets (3, 5, 8, 9, 10, 11, 12, 14 and 16). East Midlands scores better in (1) No poverty, (4) Quality education and (17) partnership for the goals. At the same time, there is a big difference in their scores in the goals (7) Affordable

and clean energy and (13) Climate. The **Figure shows West Midlands vs. East Midlands comparison**

In green: East Midlands; blue: West Midlands; yellow: Country average.

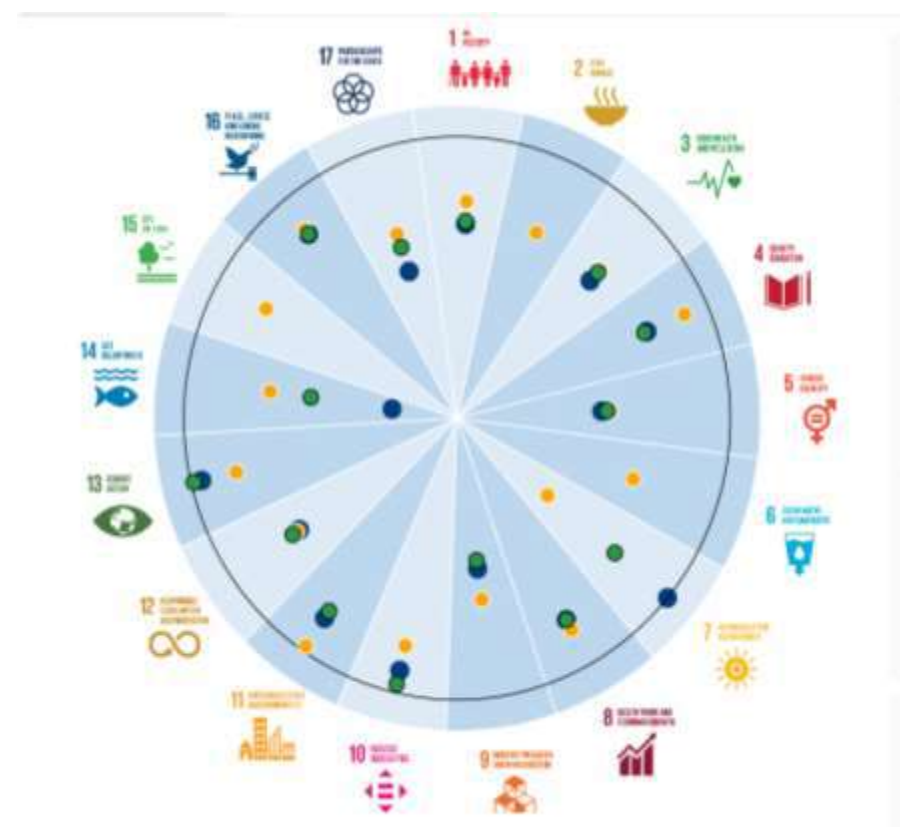


Source: [OECD Webtool](#) (1) No Poverty; (2) Zero Hunger; (3) Good health and well-being; (4) Quality Education; (5) Gender Equality; (6) Clean water and sanitation; (7) Affordable and clean energy; (8) Decent work and economic growth; (9) Industry, innovation and infrastructure; (10) Reduced inequalities; (11) Sustainable cities and communities; (12) Responsible consumption and production; (13) Climate action; (14) Life below water; (15) Life on land; (16) Peace, justice and strong institutions; (17) Partnerships for the goals

Finally, the last figures on this piece compare West Midlands region (blue) with the Northern regions (green) and the UK country average (yellow), respectively. The West Midlands region only outperforms other areas on (7) Affordable and clean energy.

Comparing the **North West (left)** with the **North East (right)** regions, we can see that they score similarly in areas such as (1) No poverty (below the

UK average); (3) Good health and well-being or (12) Responsible consumption and production and (13) Climate action. In comparison, they diverge in areas such as (4) Quality Education with a higher score in the North East or (14) with higher a higher score in the North West. **In green: North of England regions; blue: West Midlands; yellow: Country average**



Source: [OECD Webtool](#). (1) No Poverty; (2) Zero Hunger; (3) Good health and well-being; (4) Quality Education; (5) Gender Equality; (6) Clean water and sanitation; (7) Affordable and clean energy; (8) Decent work and economic growth; (9) Industry, innovation and infrastructure; (10) Reduced inequalities; (11) Sustainable cities and communities; (12) Responsible consumption and production; (13) Climate action; (14) Life below water; (15) Life on land; (16) Peace, justice and strong institutions; (17) Partnerships for the goals.

How does Covid-19 make it more challenging for places in reaching the SDGs and targets?

Covid-19 is having significant direct impacts in the SDG on health and well-being. Nevertheless, it also has significant effects on other SDGs connected with "people", "prosperity" or "partnerships". Areas related to poverty or education are directly influenced by Covid-19 as it affects decent work and economic growth and inequalities, but also other areas such as responsible consumption and production or sustainable cities and communities have been affected.

The economic effects of Covid-19 are uneven in space with more deprived areas, coastal and urban areas being the most affected (Florida et al., 2020; McCurdy, 2020; Nathan, 2020). The UK's most deprived towns and cities, some of which are also reliant on tourism are amongst the areas hit hardest by the crisis (McCurdy, 2020), but also areas that are heavily dependent on trade have suffered as the value chains have been wholly affected (Carrascal-Incera, 2020).

The different effects of Covid-19 on sectors and activities (Carrascal-Incera, 2020; Dingel and Neiman, 2020; Kumar and Haydon, 2020) has also had different societal effects. Younger workers, female workers, low-skilled workers and poorer households appear to be the segments of the population that are more adversely affected.

During the last months, the United Nations have expressed its concerns on the challenges that Covid-19 may impose in achieving the "roadmap for humanity" set in the Sustainable Development goals and targets. The [UNDP estimates](#) that global human development—a combination of education, health, and living standards—could fall this year for the first time since 1990 when measurements began due to the consequences of the pandemic. The digital divide, health accessibility, work security and social protection imbalances have been exposed and are being rethought to ensure development that brings inclusivity, sustainability and prosperity to all communities and places.

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ONS Weekly Release Indicators

BCC EIU

On the 23rd July 2020 the ONS released the weekly publication containing data about the condition of the UK society and economy and the impact of the COVID-19 pandemic.

Business Impact of the Coronavirus

The initial results from the ninth round of the Business Impact of Coronavirus Survey (BICS) show that of the 24,492 businesses surveyed across the UK, 21% had responded as of the 21st July 2020. Unless stated, the following data is based on the period between 29th June to the 12th July 2020 and regional breakdown is not available.

Headline Indicators

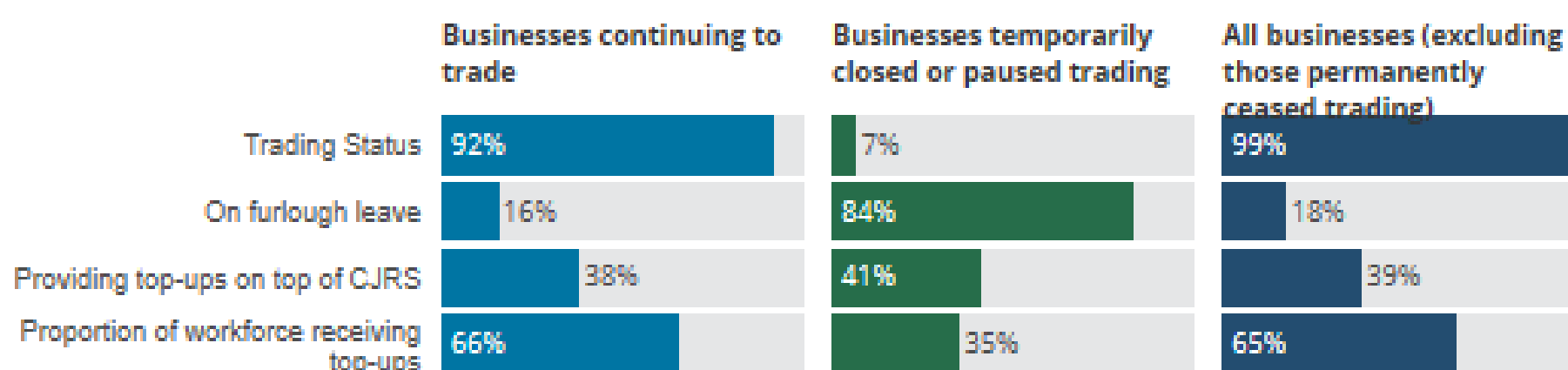
Across the UK between 29th June – 12th July, 92% of responding businesses were currently trading with 16% of the workforce on furlough leave. 38% of businesses are providing pay top-ups to the Coronavirus Job Retention Scheme and 66% of the workforce are receiving top-ups to the Coronavirus Retention Scheme.

7% have temporarily paused or ceased trading with 84% of the workforce on furlough leave. 41% of businesses are providing pay top-ups to the Coronavirus Job Retention Scheme and 35% of the workforce are receiving top-ups to the Coronavirus Retention Scheme.

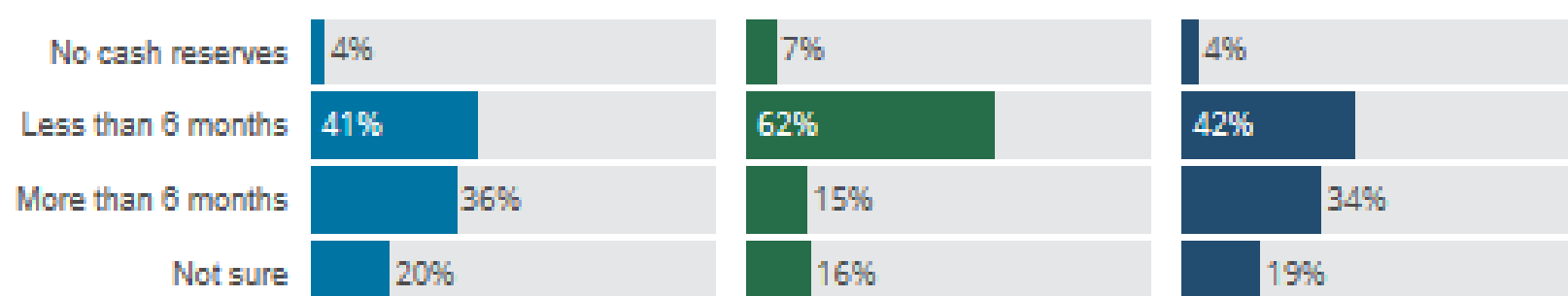
4% of businesses that are currently trading have no cash reserves, this rises to 7% for businesses that have temporary paused or closed. 41% of businesses currently trading has less than 6 months of cash reserves, this rises to 62% for businesses that have temporary paused or closed.

The Coronavirus Job Retention Scheme still remains the favoured government support scheme with 78% of businesses that are currently trading have applied for this scheme, rising to 83% for businesses that have temporary paused or closed.

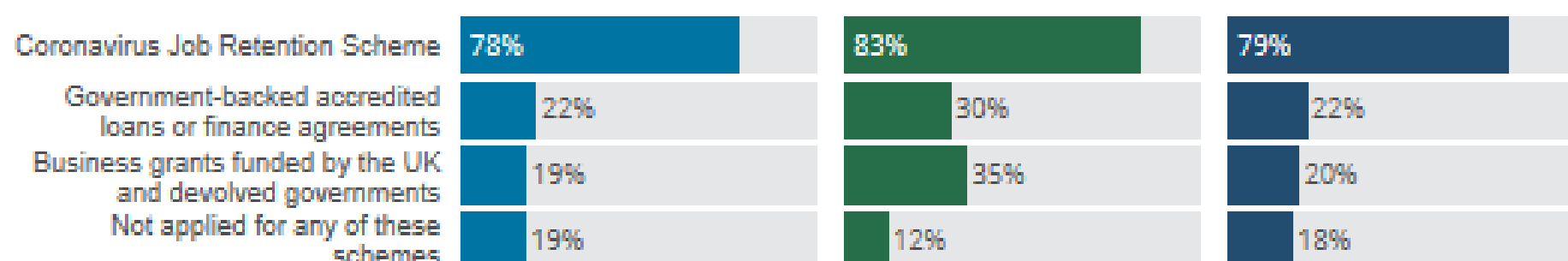
The figure below shows the **Proportion of businesses by trading status, and proportions of workforce on furlough leave and receiving pay top-ups:**



Cash reserves



Percentage of businesses applying to government schemes



86% of responding businesses have been trading for more than the last 2 weeks. 6% of responding businesses who had temporarily paused trading reported to have started trading in the last 2 weeks. Of the businesses trading, 4% had returned to their normal workplace after remote working and 7% had returned from furlough.

2% of businesses that have temporarily paused trading but intend to restart trading in the next two weeks and 5% of businesses that have temporary paused trading that do not intend to restart trading in the next two weeks.

17% of businesses that are continuing to trade reported there had been more innovation during the pandemic with 6% of businesses reporting less innovation.

Due to the pandemic, 12% of businesses have diversified to provide new goods or services.

6% of business reported their capital expenditure had increase. Although, 15% reported capital expenditure had stopped and 23% had decreased.

Financial Performance

10% of businesses that have continued trading reported turnover had increased by at least 20%

and 26% reported that turnover had not been affected. However, 57% of businesses reported turnover had decreased by at least 20%.

National Footfall

Customer activity figures are provided by Springboard. The volume of footfall has been compared to the same day the previous year (i.e. Tuesday 14th July 2020 will be compared to Tuesday 16th July 2019) for high streets, retail parks and shopping centres.

The overall footfall level seven-day (13th – 19th July) average was 60% of the same day a year ago, with Friday 17th July reaching two-thirds of the level the same day a year ago.

High street footfall rose on Saturday 18th July 2020 to just over 60% of its level on same day a year ago.

The following graph shows the volume of footfall for the UK between 1st March to 19th July, year on year percentage change between footfall on the same day: Source: Springboard and the Department for Business, Energy and Industrial Strategy



Social Impact of the Coronavirus

Indicators from the Opinions and Lifestyle Survey is a weekly update to understand on the impacts of the COVID-19 pandemic on people, households and communities in Great Britain.

Data on the social impact of the coronavirus (COVID-19) on Great Britain were collected from the Opinions and Lifestyle Survey (OPN). The data relate to the final results for Wave 18, covering the period 15nd – 19th July 2020. In this wave there were 1,606 (64%) responding adults.

Face Coverings

71% of adults have worn a face covering outside their home. 80% of people aged over 70 years were most likely to report wearing a face covering when outside of their home this week. 76% of women were likely to wear a face covering than men at 66%.

50% of adults who have been shopping this week have worn a face covering and 82% of adults who had used public transport reported to wearing a face covering.

81% of responding adults reported that are either very or fairly likely to wear one in the next 7 days.

Returning to School

65% of adults reported they had been asked to send their children or young people back to school or college during June and July. Of these, 63% of all children or young people had attended school or college with a further 19% reporting some had attended and some had not.

89% of adults reported that were either very or fairly likely that their children would return to school or college when the new term starts.

Work

80% of adults reported they had either worked at home or travelled to work, with 53% travelling to work and 27% working exclusively at home.

Socialising and Leisure

71% of adults met up with others to socialise between 15th to 19th July. Of these adults, 44% had met with one or two people, 28% met with three or

four people and 28% met with more than five people.

57% of adults always maintained social distancing, while 7% stated they rarely or never maintained social distancing.

41% of adults reported they had family or friends visit them at their own home between 8th and 12th July.

33% reported they would be comfortable or very comfortable to eat indoors or outdoors at restaurant. 52% reported they would feel comfortable or very comfortable to eat at an outdoor restaurant.

Health and Well-being

63% of respondents that reported they had a physical or mental health condition or illness had been receiving medical care before the pandemic. Of these, 31% reported that treatment had started or continued since the outbreak, 30% had received some treatment but stated this had either been reduced or not received treatment for all health conditions. 21% of respondents had their treatment cancelled.

Where respondents had received a reduced level of treatment or treatment had been cancelled, 24% reporting to feeling their health had gotten worse over time.

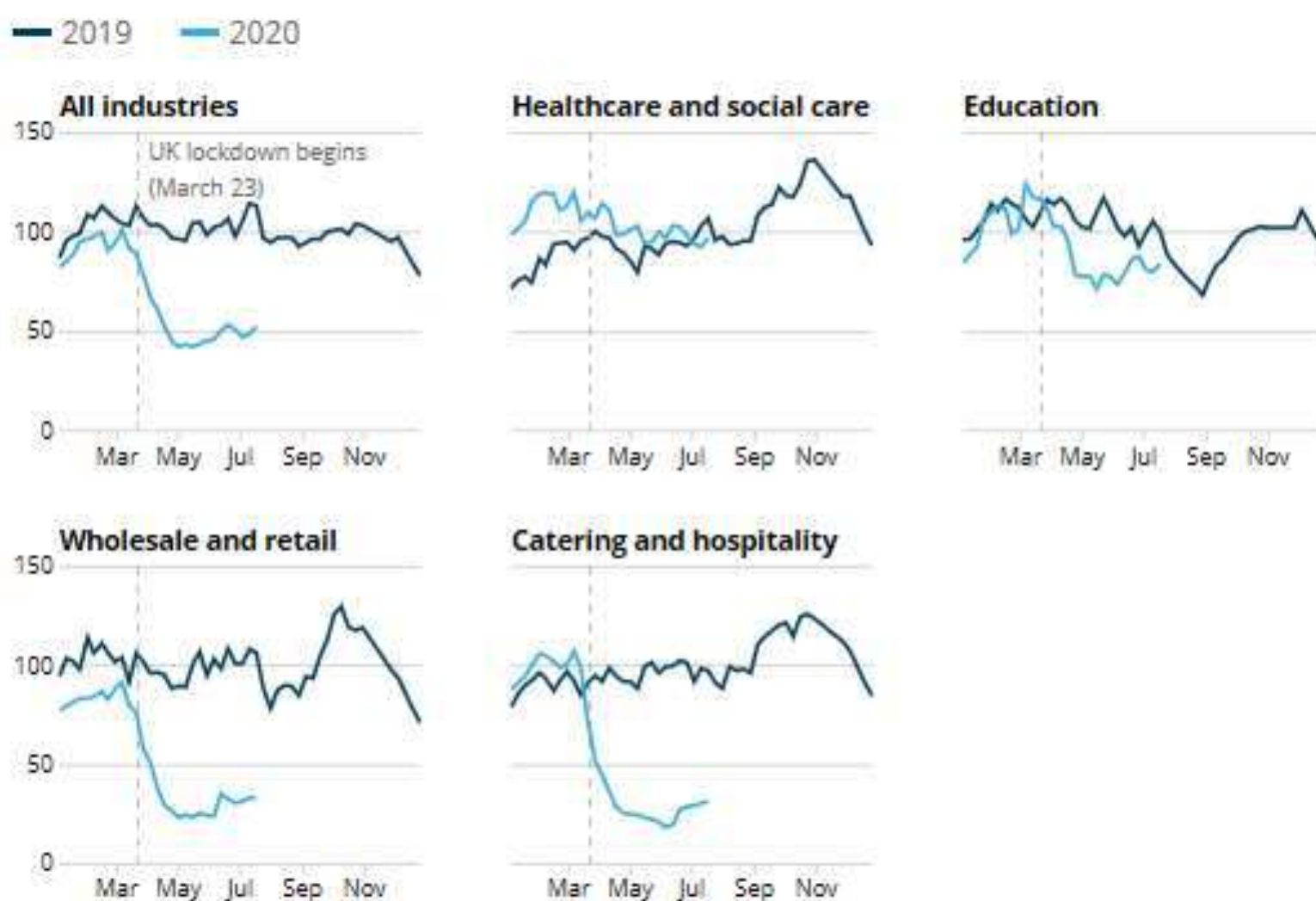
Online Jobs Adverts

These estimates are experimental figures are taken from jobs adverts provided by Adzuna. Each value in the series measures the number of jobs adverts at a point in time, indexed for the average for 2019 (average = 100). Currently, the figures are only available for the UK as a whole, however regional breakdowns are in development.

For total online job adverts between 10th – 17th July, there was an increase from 48% to 52% of their 2019 average.

The only categories that experienced a decline were in wholesale and retail (-0.4pp) and the unknown category (-0.3pp).

The following image shows the total weekly jobs adverts on Adzuna for all industries and four selected categories between 4th January 2019 to 17th July 2020 (Index 2019 average =100): Source: Adzuna

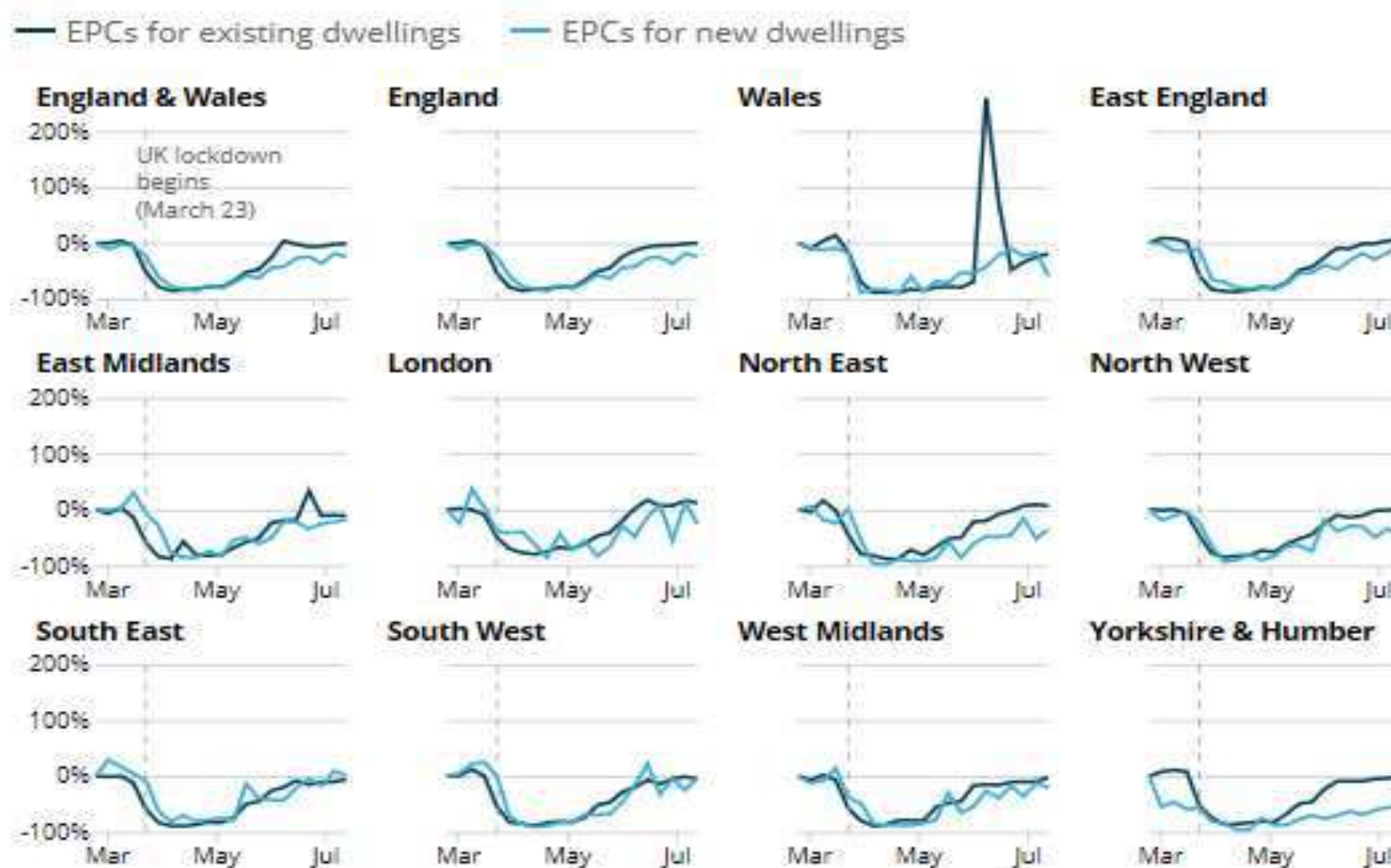


Energy Performance Certificates (EPCs)

An EPC contains information on the energy efficiency of a property and is a requirement when a property is built, sold or rented. New buildings or conversions of existing buildings require an EPC once construction has been completed. In the week commencing 13 July, EPC lodgements for existing dwellings across all English regions

(West Midlands 1.6% lower) returned to similar levels observed at the end of February. While EPC lodgements for new dwellings were around 25% lower across England and Wales, for West Midlands region 21.4% lower.

The figure below shows **Existing and new EPCs lodgements by region, percentage change since week commencing 24th February:**



Source: Ministry of Housing, Communities and Local Government (MHCLG), Domestic Energy Performance Certificate Register. Please note, the spike seen in Wales in the middle of June was due to local authorities in Wales reviewing their social housing stock.

Weekly Deaths Registered: 17th July 2020

The following analysis compares the latest time period (week of the 17th July 2020) to the previous week period (week of the 10th July 2020) for the number of deaths registered and the number of deaths related to the Coronavirus.

Across England and Wales, the overall registered death figure increased from 8,690 in the week of 10th July to 8,823 in the week of 17th July. The number of deaths registered that state Coronavirus on the death certificate has decreased from 366 people to 295 people over the same period. Regional level analysis shows that the West Midlands the overall registered death figure increased from 902 in the week of 10th July to 956 in the week of 17th July. The number of registered deaths related to Coronavirus has decreased from 48 to 25 over the same period.

There was a total of 639 deaths registered across the WMCA (3 LEP) area in the week of the 17th July. There were 16 deaths registered that were related to Coronavirus over the same period – this accounts for 2.5% of total deaths. The WMCA (3

LEP) area accounts for 64% of the 25 Coronavirus related deaths registered in the West Midlands Region.

In comparison to the week of the 17th July, the overall registered death figures across the WMCA (3 LEP) increased by 54 people, however, the number of registered deaths related to Coronavirus decreased by 11 people.

At local authority level, Nuneaton and Bedworth accounts for 25.0% (4) of deaths related to Coronavirus in the WMCA (3 LEP), this is followed by Warwick at 18.8% (3 deaths). Of deaths involving Coronavirus registered in the week of 17th July, 50% (8) occurred in a hospital, representing a decrease when compared to the week of the 10th July at 59.3% (16). The number of Coronavirus related deaths that occurred in a care home increased percentage wise from 25.9% (7) to 37.5% (6) in the week of 17th July.

The following table shows the place and number of deaths registered that are related to Coronavirus in the week 17th July:

Area name	Care home	Elsewhere	Home	Hospice	Hospital	Other communal establishment	Total
Cannock Chase	0	0	0	0	0	0	0
East Staffordshire	0	0	0	0	1	0	1
Lichfield	1	0	0	0	0	0	1
Tamworth	0	0	0	0	0	0	0
North Warwickshire	0	0	0	0	0	0	0
Nuneaton and Bedworth	1	0	1	0	2	0	4
Rugby	0	0	0	0	0	0	0
Stratford-on-Avon	0	0	0	0	0	0	0
Warwick	1	0	0	0	2	0	3
Bromsgrove	0	0	0	0	0	0	0
Redditch	0	0	0	0	0	0	0
Wyre Forest	0	0	0	0	0	0	0
Birmingham	2	0	0	0	0	0	2
Coventry	0	0	0	0	0	0	0
Dudley	1	0	0	0	1	0	2
Sandwell	0	0	0	0	0	0	0
Solihull	0	0	0	0	1	0	1
Walsall	0	0	0	0	1	0	1
Wolverhampton	0	0	1	0	0	0	1
WM 7 Met.	3	0	1	0	3	0	7
Black Country LEP	1	0	1	0	2	0	4
Coventry & Warwickshire LEP	2	0	1	0	4	0	7
Greater Birmingham & Solihull LEP	3	0	0	0	2	0	5
WMCA (3 LEP)	6	0	2	0	8	0	16

Source: ONS, Deaths registrations and occurrences by local authority and health board, 28th July 2020

HEADLINES	
SECTOR	KEY CONCERNS
Cross Sectoral	<p>Access to Finance</p> <ul style="list-style-type: none"> Government support measures have helped many businesses during the pandemic. However, business leaders are forecasting two cliff edges for businesses – the first at the end of October when the furlough scheme ends, then in January when the deferred VAT and business rates must start to be paid back. There are pleas for Government to extend its support to business, specifically an extension of the furlough scheme and for the Government to support those industries that cannot turn their revenues back on within days or weeks of reopening, such as hospitality and the events industry. Requests for introduction of a reduction in corporation tax for small businesses. <p>New Business Models</p> <ul style="list-style-type: none"> There has been a continued interest in companies looking for digital support to adapt processes as more and more services move online or require changes in the way SMEs work. Continued downsizing of office space and an offloading of premises continues and will affect the commercial and professional rental market. However, those looking to expand to bigger premises are hopeful of favourable rental terms or more appealing options to purchase. <p>Jobs & Recruitment</p> <ul style="list-style-type: none"> Starting to see some companies starting to consider recruitment campaigns & planning to employ staff from potentially September, but still concerns about future. Companies considering part time hours when they start recruiting. <p>Redundancies & Furlough</p> <ul style="list-style-type: none"> General view from Recruitment Agencies, that some signs market picking up, but most agency staff still furloughed at least for another couple of months, and likely September at earliest. Feeling across businesses in all sectors is that likely more redundancies in next 6 months, especially once furlough scheme ends and would welcome any assistance from a central point, rather than them searching across different partners.
Logistics & Transport	<p>Jobs & Labour Supply</p> <ul style="list-style-type: none"> Logistics companies DPD and Hermes have made significant investments in order to meet the demands of home shopping deliveries, providing a major increase in local job opportunities.
Cultural	<p>Reopening</p> <ul style="list-style-type: none"> Many theatres and museums will not survive the pandemic unless measures are put in place to protect the industry.
Visitor Economy & Sports	<p>Closures</p> <p>There are further closures in the Hospitality industry as it deems challenging for some outlets to meet the comeback given the Covid restrictions that remain in place.</p> <p>Access to Finance</p> <p>Businesses in this sector cannot turn their revenues back on within days or weeks of reopening – so need more government support to help survive.</p>

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HEADLINES

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Construction	<p>Demand</p> <ul style="list-style-type: none"> • Businesses reporting a lower demand than usual due to Covid-19. <p>Access to Finance</p> <ul style="list-style-type: none"> • Businesses looking for support to help loss of income over the pandemic. <p>Safety</p> <ul style="list-style-type: none"> • Businesses reporting they are struggling to ensure safety of all workers in line with restrictions and limitations.
Retail	<p>Diversification</p> <ul style="list-style-type: none"> • With a significant and immediate decline in footfall, more retail businesses are creating or enhancing an online eCommerce presence to improve their offering and find alternatives to relying solely on a physical presence with a retail outlet. Retail businesses reporting that social distancing measures and the reluctance of shoppers to visit town centres is slowing the speed of a recovery.
Business & Professional Services	<p>General Performance</p> <ul style="list-style-type: none"> • Businesses related to activity in HR, Legal and Health & Safety are performing well and have seen a positive upturn in business since, and partly due to, the Covid-19 pandemic. • Increases in sales have been related to dealing with common issues such as furlough (CJRS) and redundancies as well as other ad hoc issues.

NEW ECONOMIC SHOCKS			
COMPANY	LOCATION	SECTOR	SOURCE/DETAIL
Grand Theatre	Black Country	Leisure/ Arts	Theatres across our region including the Grant Theatre in Wolverhampton are set to lose £10mil through cancelled pantomimes. https://www.expressandstar.com/entertainment/theatre-and-comedy/2020/07/25/theatres-across-region-face-10-million-panto-loss/
Howdens	Black Country and wider areas	Retail	Company sees a 29% decrease in revenue at half year point, leading to a £14mil loss. https://www.expressandstar.com/news/business/2020/07/23/howden-slips-to-a-half-year-loss/
Marks & Spencer	UK Wide	Retail	M&S propose up to 950 job losses across store management and property. It has not yet been announced exact areas to be hit. https://www.dailymail.co.uk/news/article-8540029/Marks-Spencer-announce-hundreds-job-cuts-days.html
Rileys	Black Country	Hospitality	As Rileys sports bar sets to close its' Wolverhampton club, 200 jobs are at risk. https://www.birminghammail.co.uk/black-country/200-job-risk-rileys-sports-18617812
BBC	Birmingham	Entertainment	BBC accused of abandoning West Midlands as plans to axe 52 jobs announced https://bit.ly/2WPWjBq
Marks & Spencer	Birmingham	Retail	M&S 'set to announce hundreds of job cuts' as high street turmoil deepens after lockdown https://bit.ly/30GnAHq
Island Bar	Birmingham	Hospitality	Island Bar closes for good as coronavirus 'destroys' business. The Suffolk Street Queensway venue was among Birmingham's first independents, opening in 2006. https://www.birminghammail.co.uk/whats-on/food-drink-news/island-bar-closes-good-coronavirus-18656772
Birmingham Museums Trust	Birmingham	Cultural	Almost half of staff at Birmingham Museums Trust facing redundancy. The trust runs nine museum sites across Birmingham – including the Birmingham Museum and Art Gallery and the Thinktank. https://bit.ly/331HK1l
Britishvolt	Coventry	Manufacturing, Automotive	Coventry looks to have missed out on over 3,500 jobs after Britishvolt signed a memorandum of understanding for a huge electric car battery factory with the Welsh Government. https://www.thebusinessdesk.com/westmidlands/news/2042508-coventry-misses-out-of-huge-electric-car-battery-plant

NEW INVESTMENT, DEALS AND OPPORTUNITIES			
COMPANY	LOCATION	SECTOR	DETAIL & SOURCE
Aldi	Black Country	Retail	New Aldi store to open in Walsall providing 50 new jobs. https://www.expressandstar.com/news/business/2020/07/21/plans-for-new-aldi-in-pelsall/
DWP	West Midlands	Public sector	DWP look to recruit a further 300 Work coaches to support increasing numbers of unemployed.
AWI	Black Country	Manufacturing	Company invests £1mil investment in material to meet demand. https://www.pesmedia.com/alloy-wire-international-materials-investment-23072020/
Hermes	UK Wide	Logistics	Hermes set to recruit 10,000 new staff in a £100mil investment to meet demand for new stay at home shoppers. https://news.sky.com/story/coronavirus-hermes-delivers-10-500-jobs-to-meet-stay-at-home-shopping-demand-12032689
Knights	Paradise, Birmingham	Legal	Taking 18,000 sq ft of Two Chamberlain https://bit.ly/3jw9FMR
Martin Sprocket & Gear	Leamington Spa	Manufacturing	A leading manufacturer and supplier of power transmission products, material handling components and systems has opened its first European operations at a multi-million pound business park in Leamington Spa. https://www.thebusinessdesk.com/westmidlands/news/2042533-business-park-signs-us-industrial-firm-for-its-first-european-operations
Exasoft	Coventry	Digital and Creative	A software and digital solutions company has won the contract to create the new Coventry UK City of Culture website. The website, to be created by Coventry-based Exasoft Group, will give people a taste of what to expect for the city's year as UK City of Culture. https://www.thebusinessdesk.com/westmidlands/news/2042615-tech-company-scoops-city-of-culture-contract
Portway Scaffolding	Redditch	Construction	A Redditch-based scaffolding contractor has secured a funding boost to support its cash flow after building sites across the UK closed due to the coronavirus. https://www.thebusinessdesk.com/westmidlands/news/2042713-funding-safeguards-jobs-at-scaffolding-firm
HealthCorm	Tanworth in Arden	Human Health and Social Care	A Warwickshire businessman has received support to help set up a social enterprise supplying PPE equipment, motivated after his brother contracted Covid-19 at the start of the pandemic. https://www.thebusinessdesk.com/westmidlands/news/2042657-ppe-firm-set-up-by-businessman-inspired-by-brother%E2%80%99s-covid-19-sees-rapid-growth

NEW INVESTMENT, DEALS AND OPPORTUNITIES			
COMPANY	LOCATION	SECTOR	DETAIL & SOURCE
Lotus	Wellesbourne	Automotive, Technology, Engineering	Sports car manufacturer Lotus is to set up an advanced technology centre at the University of Warwick's Wellesbourne campus, which will also be a new headquarters for the company's engineering consultancy. https://www.thebusinessdesk.com/westmidlands/news/2042651-lotus-drives-ahead-with-new-advanced-technology-centre-at-university-of-warwick
Associated Beauty Therapists	Bidford on Avon	Health & Beauty, Retail	All jobs at a Warwickshire-based specialist membership and insurance company for the health and beauty sectors have been secured after the business received a Coronavirus Business Interruption Loan (CBIL) from Lloyds Bank. https://www.insidermedia.com/news/midlands/jobs-safeguarded-as-firm-receives-pandemic-funding-boost
Eatron	Warwick	Digital and Technology	A Warwick-based technology start-up has secured an investment worth more than €1m. Eatron, a developer of AI-powered software products for autonomy and e-mobility, has received the backing from Hirschvogel Ventures – the strategic investment arm of the Hirschvogel Automotive Group. https://www.insidermedia.com/news/midlands/tech-start-up-secures-1m-investment
JLR/Uni of Cambridge	National	Digital and Technology	Jaguar Land Rover and the University of Cambridge have developed new contactless touchscreen technology designed to help keep drivers' eyes on the road and reduce the spread of bacteria and viruses in a post Covid-19 world. https://www.insidermedia.com/news/midlands/contactless-tech-developed-by-jlr-and-university-of-cambridge
Lambs, The Opposition, The Vintner	Stratford-upon-Avon	Hospitality & Catering	Three Stratford restaurants have reopened their doors after enlisting the help of a national hygiene company headquartered in the town to deep clean their premises and ensure they stay in tip-top condition. Lambs, The Opposition and The Vintner have teamed up with Stratford based Filta Group to thoroughly sanitise their premises as lockdown continues to ease and businesses and public spaces reopen in the town. https://www.cwgrowthhub.co.uk/news/stratford-restaurants-are-ready-re-open-thanks-deep-clean
Underwood Wines	Stratford-upon-Avon	Retail	Although parts of the business have suffered during lockdown, including the supply to pubs and events, Underwood Wines almost quadrupled their sales of drinks to private customers during lockdown. A boom in private customers has enabled a Stratford-based wine merchants to stay afloat during the coronavirus pandemic. https://www.cwgrowthhub.co.uk/news/demand-lockdown-drinks-keeps-stratford-wine-merchants-afloat

NEW INVESTMENT, DEALS AND OPPORTUNITIES

COMPANY	LOCATION	SECTOR	DETAIL & SOURCE
Henley Ice-Cream	Henley-in-Arden	Hospitality & Catering	<p>A family-run Henley business has defied the Coronavirus economic odds and actually taken on new employees – thanks to the honesty of local people. Henley Ice Cream was facing a bleak spring and summer when, like many other businesses, it had to close its doors and furlough staff with no positive business signs ahead.</p> <p>https://www.cwgrowthhub.co.uk/news/henley-ice-cream-defied-coronavirus-economic-odds-and-has-actually-taken-new-employees</p>
Stadium TM and Flood Engineering	Coventry	Manufacturing, Engineering	<p>Two Coventry firms are at the front of the queue in helping retailers attract customers back to town and the city centres. Stadium, which specialises in security, safety and traffic management, has teamed up with Flood Engineering to design and produce a queuing system Q-Smart which will keep shoppers socially distanced as well dry, and allow retailers to double the number of people they have waiting to enter their stores.</p> <p>https://www.cwgrowthhub.co.uk/news/midlands-firms-invent-coronavirus-queuing-system</p>

Disclaimer: The contents of this document are based on the latest data available and the contribution of regional partners in a fast paced environment, therefore we urge caution in its use and application

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The West Midlands Regional Economic Development Institute
and the
City-Region Economic Development Institute

In partnership with:

