

West Midlands

Weekly Economic Impact Monitor



Issue 62 Publication Date 03/09/21

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.

Global news has been dominated by the departure of allied forces from Afghanistan. Nationally, the number of daily new Covid-19 cases per million people confirmed in the UK remains easily the highest out of the selected European countries and is at a level slightly above that recorded for the USA. Economically disruption to supply chains continues, with factory activity now shrinking in Southeast Asia and a shortage of parts impacting on manufacturing in Europe. This week we highlight reports on prospects for developing the space sector in the West Midlands by leveraging latent competitive advantages in related areas of advanced manufacturing and also report on funding for the advanced ceramics sector in the Midlands (on the back of Strength in Places Funding success). We also look forward over the medium- and longer-term at the future of work and training and at adapting to future mobilities.

- [Global factory activity lost momentum](#) in August as the ongoing pandemic has disrupted supply chains. Southeast Asia was hit particularly hard with factory activity shrinking in Vietnam, Indonesia and Malaysia. China's factory activity also slipped into contraction for the first time in a year and a half. The issues in Asia are [affecting economies worldwide](#), with manufacturing companies reporting shortages of materials ranging from memory chips basics such as wooden pallets.
- 5 billion doses of the vaccine have been administered globally as of August 23rd, but only 15.02 million of those doses were in low-income countries, so delaying their economic convergence towards advanced economies and fuelling poverty. [The Economist Economic Intelligence Unit](#) notes that delays in inoculating the world against Covid-19 could cost the global economy US\$2.3trn.
- [US consumer confidence](#) has dropped to a six-month low, in the light of concerns over the delta variant. The University of Michigan's consumer index, plunged to its lowest level since 2011, as Americans grew more concerned about the economy's prospects, inflation and the recent surge in Covid cases.
- [President Biden](#) has upheld the deal struck between the Taliban and former President Trump, to fully withdraw forces from the region. There is uncertainty about the future of Afghanistan - especially with regard to the treatment of and prospects women.
- [UK business confidence has hit a 4-year high](#), due to the growing optimism about the post-Covid recovery, but companies have highlighted serious concerns surrounding labour shortages – blamed on both Covid and post-Brexit immigration policies, and associated pressures on wages. The [Lloyd's business barometer](#) showed overall confidence rose by 6 points to 36% in August, the highest levels since April 2017.
- The [IHS Markit / CIPS UK Manufacturing PMI](#) found that whilst the UK economy was still growing the rate at which it was growing drastically slowed. The slowdown is attributed to severe disruptions to supply chains and raw material shortages, with factors such as port capacity issues, international shipping delays, the re-imposition of Covid restrictions at key points in global supply chains and ongoing post-Brexit issues all playing a role. The impact of these supply issues is also feeding through to [rapid price inflation](#).
- This month [an eco-friendlier petrol](#) (E10) is coming to British filling stations. According to the Department of Transport introducing E10 could cut carbon by 750,000 tonnes a year, the equivalent of taking 350,000 cars off the road.
- [The Resolution Foundation](#) in their housing outlook found that between June 2020 and June 2021 house prices rose by 13.2%.
- This week the [first new major music venue and club in central Birmingham](#) for over a decade is set to open. Forum Birmingham, is a 3,500 capacity newly-upgraded complex featuring a custom-made sound.
- West Midlands based [Acacia Training has committed to supporting up to 1,000 people](#) towards a new job by the end of the year after securing funding worth almost £2.5m from three employability schemes.
- [WCG](#), formerly Warwickshire College Group, has been granted funding from the T-level Capital Fund. The £1.2m in funding that WCG has received will fund the expansion of its range of technical qualifications.
- A number of housing developments have been announced around the WMCA over the last few weeks, with developments including brownfield regeneration schemes will take place in Coventry, Nuneaton and Wolverhampton.

Recovery

- Nationally, between the 13th and 20th August 2021 total online job adverts increased by 0.2 percentage points. On the 20th August 2021, total online job adverts were at 128.3% of their average level in February 2020. Vacancies for transport/logistics/warehouse opportunities increased by 14.8 percentage points over the previous week.

- Between the 13th and 20th August 2021, the West Midlands region online job adverts decreased by 0.7 percentage points. On the 20th August 2021, total online job adverts for the West Midlands were at 146.5% of their average level in February 2020.
- According to Springboard, in the week to 21st August 2021, the volume of overall retail footfall in the UK decreased by 2% from the previous week (week to 14th August 2021). This is the first week to see a decrease in footfall across the UK since the week to 19th June 2021.
- The final results from Wave 37 of the Business Insights and Conditions Survey (BICS) based on the 5,107 businesses surveyed across the West Midlands and excluding 'not sure' responses show that 28.8% of trading businesses reported their turnover had decreased by at least 20% in the last two weeks, 46% of trading businesses reported that their turnover was unaffected and 14.8% reported their turnover had increased by at least 20%.
- Regarding international trading, excluding 'not sure' responses, 24.9% of exporting businesses in the West Midlands reported their businesses were still exporting but less than normal in the last two weeks compared with normal expectations for the time of year. Of those businesses who continued to trade and import, 17.1% in the West Midlands were importing less than normal. 61% of West Midlands businesses who were exporting reported that they had not been affected and 67.9% reported that importing had not been affected.
- Businesses were asked if they had made changes to supply chains due to the end of the EU transition period. 7.7% of responding West Midlands businesses reported they had. Where businesses stated they had made changes, the highest response at 54.8% of responding West Midlands businesses was that they were using more UK suppliers.
- 26.4% of responding West Midlands businesses reported extra costs due to additional transportation costs.
- In the West Midlands, 72.8% of responding businesses had high confidence in surviving over the next three months. 19.6% had moderate confidence of survival, 1.5% had low confidence and 5.9% were not sure.
- 5.0% of responding West Midlands businesses expect to make redundancies in the next three months. 68.8% of West Midlands businesses reported they did not expect redundancies over the next three months. The remaining 26.2% were not sure.

Local intelligence

- Current positivity regionally exists within a period of sustained uncertainty, with external issues surrounding Covid and Brexit causing businesses many issues. In particular price rises and product shortages remain a cause for concern, particularly for the construction and manufacturing sectors. Many firms are still facing financial hardship and will require additional support from government as they look to get their operations off the ground after nearly 16 months of forced closure.
- The number of firms reporting hiring challenges has increased significantly in recent weeks, reflecting a skills and jobs crisis. This has multiple facets, including a reduction in candidate availability, with recruiters facing a large increase in counter offers from existing employers to retain staff, and/or successful candidates taking up positions with competitors. This has led to a general increase in hourly rates, salaries and the introduction of attractive up-front financial incentives to candidates. This staffing crisis risks inward investment opportunities. Businesses offering lower paid, physical, undesirable and jobs with unsociable hours are struggling the most to recruit staff.

EU exit

- The problem of labour shortages problem is, according to many businesses' experiences, caused and exacerbated by the UK's exit from the EU.
- A new study exploring the impact of Brexit on business - '[Post Brexit Transition Period – An impact analysis on businesses based in the West Midlands Combined Authority area](#)' - reveals that 47% of local businesses have found it more difficult importing goods from the EU since 1st January; 34% of local businesses have found it more difficult exporting goods to the EU since 1st January; 40% of respondents had experienced increased costs and 28% have experienced border delays as a result of the UK's departure from the EU.

Medium-term sectoral opportunities

- The space sector is one of the UK's fastest growing and most promising sectors and is a key enabler of growth in other sectors. Nationally the sector employs around 42,000 people and generates an income of nearly £15 billion every year.
- Reports from a study financed via the UK Space Agency Local Space Cluster and Supply Chain Development Fund assessing and setting out the prospects for the space sector in the West Midlands have been published. Importantly, the work sets out a proposed route to increase the maturity of the West Midlands space cluster, further developing latent competitive advantages in related areas of advanced manufacturing, especially aerospace, automotive, and rail.
- The West Midlands region combines space application capabilities with important end-user sectors for space data/services (ranging from autonomous vehicles, to modern services, life sciences and agriculture), creating a powerful value-chain ecosystem for innovation, business growth, and end-user benefit.
- The Midlands has an opportunity to be a world leader in advanced ceramics following the success of the Midlands Industrial Ceramics Group (MICG) in securing funding of £18.27m from the Strength in Places Fund (SIPF) which combined with partner investment and the creation of new business opportunities, makes for a £42.1 million project. Advanced ceramics (also known as technical ceramics) are embedded in numerous high-performing products owing to their high strength, high operating temperatures, wear resistance and tailorable properties.

- The advanced ceramics sector growing rapidly across the world. Grandview Research estimates that the advanced ceramics sector achieved annual global revenues of £42 billion in 2015 and projected the sector would reach £143 billion by 2025.
- The [Advanced Ceramics Sector Profile](#) prepared to support the funding bid shows that no other region has equivalent mass of advanced ceramics specialist suppliers, end-users, and researchers. Producers of advanced ceramics form an integral part of the Midlands manufacturing supply chain, as well as exporting specialist products across the world.

Looking ahead in the medium-/longer-term – work and training, and adapting to future mobilities

- Increasing technological innovation and growing adoption of new technologies is changing the types of jobs available and the range of skills required by employers. Reskilling and upskilling the workforce is urgent to avoid significant skills gaps and mismatches within the next decade. At the same time, participation in training is declining.
- By investing in training, firms can build on existing talent and prepare themselves for the changing labour market. Developing training to improve the quality of managers is important if firms are to maximise the benefits of increased technological capability. A broader institutional culture which champions training, led from the top of organisations, is essential to this.
- Moreover, the impact of the Covid-19 pandemic in accelerating the more widespread adoption of remote and hybrid working requires managers to develop new skills to best manage workers who spend more of their time outside traditional office settings.
- The shift to remote and hybrid working also poses challenges of adapting to future mobility patterns. Post-Covid there needs to be greater emphasis on an urban model that prioritises walking and cycling and other forms of micromobility, alongside encouragement of the use of public transport and taking advantage of emerging transport innovations to reduce the long-term impact of CO2 and other vehicle pollutants. This is necessary not only as a short-term response but as a long-term national vision.
- Adapting to future mobilities is about improving health and well-being, urban design and provision of local services in line changes in values and behaviour, as well as about investment in infrastructure.

Global, National and Regional Outlook

Alice Pugh, WMREDI

Global

[Global factory activity lost momentum](#) in August as the ongoing pandemic has disrupted supply chains, raising concerns that faltering manufacturing would add to economic woes caused by a slump in consumption. Southeast Asia – a low cost manufacturing hub for many global companies – was hit particularly hard with factory activity shrinking in Vietnam, Indonesia and Malaysia, due to virus outbreaks and output suspensions. China's factory activity also slipped into contraction for the first time in a year and a half.

Continual [outbreaks of Covid-19 variants](#) are causing significant delays in the Asian markets. Part of this has been blamed on the slow progression of the vaccine roll-out. 5 billion doses of the vaccine have been administered globally as of August 23rd, but only 15.02 million of those doses were in low-income countries. The [EIU report](#) stated that vaccine inequality emerged due to a global shortage of production capacity and vaccine raw materials, logistical difficulties in transporting and storing the vaccines, and hesitancy as a result of mistrust of the shots. The issues in Asia are [affecting economies worldwide](#), for instance the speed of Germany's recovery is being put at risk as companies in the manufacturing powerhouse are reporting shortages of materials ranging from memory chips to lower-tech parts and even basics such as wooden pallets.

It has been found by [The Economist Economic Intelligence Unit](#) that delays in inoculating the world against Covid-19 could cost the global economy US\$2.3trn. With emerging economies expected to shoulder around two-thirds of these losses further delaying their economic convergence towards advanced economies and fuelling poverty. With the forecasts showing that timelines for the economic recovery will be longer in poorer economies.

[US consumer confidence](#) has dropped to a six-month low, suggesting concerns over the delta variant and elevated prices are weighing on Americans' views of the economy now and in the coming months. Figures are suggesting that the spread of the Delta variant has dented consumers' views of the economy and threatens to undermine spending on services. The latest spike has curbed restaurant reservations, airline travel and hotel occupancy. In the meantime, Americans are paying more at the shops and at petrol stations. The University of Michigan's consumer index, plunged to its lowest level since 2011, as Americans grew more concerned about the economy's prospects, inflation and the recent surge in Covid cases.

[President Biden](#) has upheld the deal struck between the Taliban and former President Trump, to fully withdraw forces from the region. The Taliban have quickly taken hold of the country; the speed at which the Taliban made territorial gains surprised many commentators in the US, UK and amongst the allies. In the meantime, efforts were made to help refugees leave the country, especially those that helped the US, British and allied forces. However, there have been multiple issues with the process as thousands of scared Afghans are trying to flee the country. The most significant issue was attacks by ISIS on people trying to flee the country, which led to the death of a number of Afghani civilians and serving US troops. As US and allied troops continue to withdraw there is uncertainty about the future of Afghanistan - especially with regard to the treatment of women given that there have been vast improvements in gender equality in the region. The expectation is that the Taliban will likely reverse most of these latter gains. The Taliban has stated that girls will be allowed to attend school past the age of 8 but classrooms, will be segregated by gender. There are new reports of [restrictions on women's freedoms](#) such as making it compulsory to wear a hijab and prohibitions on leaving the home without a male relative. This brings grave doubts about the sincerity of pledges made by the Taliban whilst in negotiations last year, and creates further doubt surrounding their commitment to what was promised for women under their regime.

A report has found that the [levels of air pollution in India could reduce the life expectancy](#) of Indians by nine years. The study has found that 480 million people in northern India face the most extreme levels of air pollution in the world. Indian cities routinely continue to dominate global population rankings and bad air kills more than a million people every year. The World Health Organisation recommends a guideline of 10µg/m³, however in 219 India's average particulate matter was 70.3 µg/m³ - the highest in the world.

National

[UK business confidence has hit a 4-year high](#), due to the growing optimism about the post-Covid recovery, but companies have highlighted serious concerns surrounding staff shortages, which may push up wages in the following months. Confidence has grown with the vaccine roll-out, lockdown restrictions being removed and changes to self-isolation rules. The [Lloyd's business barometer](#) showed overall confidence rose by 6 points to 36% in August, the highest levels since April 2017. However, the survey did show increasing concerns surrounding labour shortages.

A growing number of companies have started increasing pay to try to lure staff, particularly lorry drivers, following a drop in the [number of available workers put a squeeze on UK supply chains](#), which has left some retailers and restaurants – including [McDonalds](#), [Nandos](#) and KFC, struggling to maintain stock to serve customers. The labour crunch has been blamed on both Covid and post-Brexit immigration policies.

The [IHS Markit / CIPS UK Manufacturing PMI](#) found that whilst the UK economy was still growing the rate at which it was growing drastically slowed. They put this down to severe disruptions to supply chains and raw material shortages. Whilst significant gains in output have been achieved, companies reported that production, distribution and delivery schedules were experiencing substantial delays. A wide range of factors has contributed to the disruption, including port capacity issues, international shipping delays, the re-imposition of Covid restrictions at key points in global supply chains and ongoing post-Brexit issues. It is likely that these issues are going to persist for the foreseeable future, which could lead to some industries see further falls in growth.

The impact of these supply issues is also feeding through to [rapid price inflation](#). Rates of increase in both input costs and selling prices remained close on record highs in August, due to rising demand and constrained supply, leading to companies passing price increases onto clients and consumers alike. This has been affecting most markets, but especially auto, food stuffs and electronics.

This month [an eco-friendlier petrol](#) is coming to British filling stations but according to the RAC 24% of motorists are unaware of it and 27% do not know if their car is compatible. Currently, the petrol grade in the UK is E5, containing up to 5% ethanol, with the other 95% being regular unleaded petrol. Their replacement, E10, will see the percentage increased to 10%, bringing the UK in line with countries such as Belgium, Finland, France and Germany. Introducing E10 could cut carbon by 750,000 tonnes a year, according to the Department of Transport, the equivalent of taking 350,000 cars off the road. Every petrol vehicle built after 2011 should accept E10. However, it will not be compatible with some older vehicles, according to RAC this could be up to 600,000 cars. The government has set up a [website here](#), for you to check out whether your car will run on E10 fuel.

The oil giant [Shell](#) has also announced that it is aiming to install 50,000 charging points on Britain's streets by 2025, as part of a government backed push to increase electric vehicle numbers and reduce carbon emissions to net zero by 2050. Furthermore, Shell will roll out the charging point through on street charging company Ubitricity which it acquired earlier this year. The government has [estimated](#) that the UK will need between 280,000 and 480,000 charging points by 2030, which is the year it plans to ban the new sale of petrol and diesel cars.

[The Resolution Foundation](#) in their housing outlook found that between June 2020 and June 2021 house prices rose by 13.2%. This has surprised many as many expected prices to fall as they would usually do during a recessionary period. Normally, as the economy contracts, pressure would be placed on both incomes and confidence, driving prices down. However, over the last year there has been a dramatic increase in aggregate savings. Additionally, there has been a change in the way we live at home over the last year as there is increasing demand for larger homes, in less populated areas. This is likely due to the need for new home working space and home-working has also allowed for greater locational flexibility, as employees no longer need to live near their work. Mortgage rates have also got cheaper. Finally, transaction tax holidays introduced across all nations in summer 2020, have been inflating house prices.

Regional

This week the [first new major music venue and club in central Birmingham](#) for over a decade is set to open. Forum Birmingham, is a 3,500 capacity newly-upgraded complex featuring a custom-made sound system located on the site of the cities legendary Hummingbird, Top Rank and carling Academy venues. The family business behind the venue

has offered 1,000 NHS and key workers free entry and drink provided by Corrs at the event show this week, to show appreciation for their service during the pandemic.

The renovated Forum Birmingham building in previous incarnations hosted performances by global superstars throughout the 1970s through to the 2000s, including Bob Marley and The Wailers, The Ramones, the Clash and Nirvana. The [reconstruction of the building will include](#) the reconstruction of the original woven wooden sprung dance floor, new concrete floors, a steel mezzanine, and the installation of a highly-regarded d&b audiotechnik line array sound system. Additionally, the venue will also feature Space 54, a second room with its own high-spec lighting and sound offering. Cutting edge visuals throughout the venue here have been provided by DMX Productions – the team behind stages at Glastonbury - including high resolution LED screens, special FX and immersive lighting.

West Midlands based [Acacia Training has committed to supporting up to 1,000 people](#) towards a new job by the end of the year after securing funding worth almost £2.5m from three employability schemes. 600 people aged 19 to 23 will benefit from £1.3m in funding to gain a qualification level 2 or 3 in either care, sports and fitness beauty, or IT. With adults over the age of 24, able to gain a complete A-level equivalent qualification in residential childcare, health and social care, or cyber security and coding, using £500,000 provided by the National Skills Fund. A work placement scheme will also be run for job seekers of all ages, thanks to £500,000 in funding for the Sector-based Work Academy Programme.

Additionally, it was announced that [WCG](#), formerly Warwickshire College Group, has been granted funding from the T-level Capital Fund. [T levels are new national qualifications](#) that follow GCSEs and will be equivalent to 3 A-levels. These 2-year courses, launched in September 2020, have been developed in collaboration with employers and businesses so that the content meets the needs of the industry and prepares students for work and further training or study. [T-levels offer students](#) a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 315 hours (roughly 45 days). The £1.2m in funding that WCG has received will fund the expansion of its range of technical qualifications. WCG will start providing T-levels in engineering, health and science and construction from September 2022. The government funding will also allow for the refurbishment of existing buildings, workshops and classrooms at WCG's Rugby College, Pershore College and Royal Leamington Spa College sites.

A number of housing developments have been announced around the WMCA over the last few weeks. [Homes England](#) lodged a hybrid planning application with Coventry City Council to build new properties on London Road. The project will measure around 22 acres, the application site mainly comprises an area of rough grassland, scrub and trees. It is also home to the former Whitley Pumping station and Lodge building. Previously, the site had been designated a green belt, but this status was removed following an independent examination. Homes England is seeking to build upward of 195, with full planning permission being sought for the restoration and conversion of the Pumping station and Lodge building to provide four apartments and one dwelling. 25% of the housing is also set to be affordable housing.

[Homes England](#) is also seeking to build an additional 125 houses council-owned land in Coventry. Again, the council has worked in collaboration with Homes England, to outline the plan for the new homes on Allard Way. The homes will be built on around 11 acres of grassland fields. 25% of the dwellings is expected to be affordable housing.

The [WMCA is set to build 400 new homes and new commercial premises](#), in a multi-million-pound investment. The brownfield regeneration schemes will take place in Coventry, Nuneaton and Wolverhampton. The scheme will include at least 300 homes in Wolverhampton city centre which will be the first phase of the Brewers Yard regeneration. Abbey Street, Nuneaton, will home a 56,000sqft commercial development designed to support the regeneration of the town centre and the creation of at least 30 jobs. The final development will be Coventry and consist of 94 new homes.

The largest housing development has been announced by [Warwick District Council's housing company Milverton Homes](#) has partnered with Vistry Linden to deliver 620 homes in Kenilworth. Warwick District Council, is investing £60m into the joint venture and will receive 248 affordable homes which are zero-carbon and built to 'national development space' standards. Plus, an additional 62 for private rent.

How Can the Space Sector Drive Growth and Productivity in the West Midlands?

Professor Simon Collinson

The Space Sector in the UK

In the last decade, space has transformed into one of the UK's fastest growing and most promising sectors. Trebling in size since 2010, the UK space industry now employs close to 42,000 people across the country and generates an income of nearly £15 billion every year. Space has the potential to drive growth and productivity across many areas of the wider UK economy, as a strategic “enabler of growth in other sectors” (Gov.uk, 2015) and ‘critical national infrastructure’. In response to this, the [UK Space Agency ‘Local Space Sector Cluster and Supply Chain Development’ Fund](#) was established to develop the maturity of ‘early-stage’ local space clusters across the UK. This ‘seed corn funding’ focussed on providing evidence and analysis of local ecosystems in order to stimulate local advocacy and investment in Space and increase the uptake of space data and technologies. [The 2020 funding was awarded to seven locations](#) – including the West Midlands – to ensure space is a priority for regional economic growth and attract commercial investment from space companies to these areas.

The Development of a West Midlands Space Cluster

The main outcome of this work is a proposed route to increase the maturity of the West Midlands space cluster. [Our research has revealed the latent](#) competitive advantages, through new combinations of assets, technologies, skills, knowledge, and expertise that are present in the West Midlands region now, as the building blocks of a future West Midlands space cluster. We now have a deeper understanding of the foundations available for attracting further investment and talent to drive the evolution of this cluster, as part of a wider regional economic growth plan.

Strengths of the Region

A unique strength for the future development of a West Midlands space cluster is our manufacturing sector (aerospace, automotive, and rail). The West Midlands is a globally significant sector for advanced manufacturing, assembling a critical mass of globally competitive business and high-tech Small Medium Enterprises (SME's) operating across a range of transport-related sectors, and in particular aerospace, automotive, and rail. Within the region we have strong supply-chains mobilised around key capabilities (such as engines, electromechanical systems etc.). These industries (and in particular aerospace) share close similarities with space and thus demonstrate strong latent space potential. Furthermore, whilst the West Midlands is home to only a handful of downstream space application businesses, the region combines space application capabilities with important end-user sectors for space data/services, creating a powerful value-chain ecosystem for innovation, business growth, and end-user benefit. Our space application capabilities include data analytics, image analysis, artificial intelligence, machine learning, and gaming technologies. The West Midlands holds particular strengths in key user sectors that have the potential to benefit significantly from space enabled data and services, including future transport (connected and autonomous vehicles, digital rail etc.), modern services, health and life sciences (connected data driven services), and agriculture 4.0 (precision agriculture and autonomous farming systems). Combining satellite-enabled applications (including, ubiquitous connectivity, remote sensing, and precision navigation and time), space-enabled systems and services have the potential to transform these end-user sectors, addressing major industrial and societal challenges and driving innovation, competitiveness, and growth.

Helping the Region Rebuild

This is an important national initiative to both enhance the UK's position in the global space technology sector and promote regional growth. These will translate leading R&D into applied technologies and better job opportunities for the region as a whole. Exploration of the global space technology sector is especially welcome at this challenging time as we start plotting our region's economic recovery from the coronavirus pandemic.

The Midlands Now Has an Opportunity to Be a World Leader in Advanced Ceramics

Ben Brittain, WM REDI

Earlier in the year, City-REDI was proud to be part of a consortium of partners that included Rolls Royce and JCB, to create an [Advanced Ceramics Sector Profile](#). The aim of this was to make the case for greater investment in this huge growth opportunity.

Following the success of the sector profile, [The Midlands Industrial Ceramics Group \(MICG\)](#) has secured £18.27m in government funding provided through UK Research and Innovation's flagship [Strength in Places Fund \(SIPF\)](#), to put the area firmly on the map as a global centre for advanced ceramics.

With the SIPF cash injection, the Midlands Industrial Ceramics Group will develop streamlined processes to bring new, advanced ceramics technologies to market faster, with less energy usage and lower carbon emissions. This will lead to jobs growth of 4200 by 2030.

The job growth opportunities are substantial, which result from the advanced ceramics sector growing rapidly across the world. Grandview Research estimates that the advanced ceramics sector achieved annual global revenues of £42 billion in 2015 and projected the sector would reach £143 billion by 2025. The sector is also rapidly growing in the UK, with Grandview Research¹ estimating that the UK market for advanced ceramics is expected to grow at 12.8% per annum until 2024. By comparison, Grandview estimates the global biotechnology market will grow by 7.4% per annum to 2025.

The Midlands is particularly well-placed to capitalise on this growth. The UK advanced ceramics industry has a significant cluster in the Midlands, with a clear opportunity to grow. Our research at City-REDI found that no other UK region has the equivalent mass of advanced ceramics specialist suppliers, end-users, and researchers.

As such the Midlands has the largest cluster of advanced ceramics producers in the UK. These producers form an integral part of the Midlands manufacturing supply chain, as well as exporting specialist products across the world, with firms like Morgan Advanced Materials, Mantec Technical Ceramics, Prince Materials, CDS group, Precision Ceramics, PCL Ceramics, Foseco, and Trelleborg who are all founding members of the Midlands Industrial Ceramics Group.

The growing industry is a regional success story, with the region attracting large amounts of Foreign Direct Investment (FDI) in some of the region's high productivity priority sectors that use advanced ceramics. An example is Geely investment in London Taxis in Coventry for the development of electric taxis, which are dependent on improved battery technology that relies on advanced ceramics.

The money by the government will accelerate this growth and will be used to create a world-leading industrial and academic research and development programme over the next four years, creating a cluster of new businesses in the Midlands and strengthening the supply chain in the region, resulting in thousands of new jobs.

The SIPF funding, combined with partner investment and the creation of new business opportunities, will together make the programme a £42.1 million project.

From this, the region's advanced ceramics sector will only go from strength to strength. The region thus is set to become a global leader in this growing and crucial sector.

¹Grandview (2017). Biotechnology Market Size, Share & Trends Analysis Report By Application (Health, Food & Agriculture, Natural Resources & Environment, Industrial Processing Bioinformatics), By Technology, And Segment Forecasts, 2018 – 2025

Perspectives on the Future of Work and Training

Abigail Taylor, WMREDI

This article is a summary version of a slightly longer paper prepared in early 2021 for a project on Megatrends and Future Cities, which is also informing a Future Business District Study. It is concerned with trends in the future of work and training and their implications for the West Midlands. Increasing technological innovation and growing adoption of new technologies is changing the types of jobs available and the range of skills required by employers. At the same time, participation in training is declining. The Covid-19 pandemic risks accelerating and accentuating these trends, further polarising labour markets and widening inequalities. As the [Futures of Work blog](#) puts it “By compressing processes already under way, the pandemic has expedited the future of work into the present”.

Introduction

Work in the future is likely to involve greater demand for higher-level skills, especially technology and interpersonal/people skills. Unless the UK finds a way to radically upskill its workforce, over the next decade, this will lead to skills mismatches limiting individual employment and earnings opportunities and also firm performance and productivity, so reducing UK competitiveness. Reskilling and upskilling the workforce is urgent. Unless the UK finds a way to radically upskill its workforce, over the next decade, this will lead to skills mismatches which could limit both individual employment and earnings opportunities but also firm performance and productivity.

By investing in training, firms can build on existing talent and prepare themselves for the changing labour market. Developing the quality of managers and a broader institutional culture which champions training is essential to this.

Key policy messages

- Reskilling and upskilling the UK workforce is urgent to avoid significant skills gaps and mismatches within the next decade.
- Developing training and improving the quality of managers is important if firms are to maximise the benefits of increased technological capability.
- There is a need for employers to work with government, education providers and job search platforms to improve data regarding job and skills opportunities for workers.
- There is a need to work across organisations to share good practice for developing the quality of managers and a broader institutional culture which champions training. It is vital such initiatives are actively led from the top of organisations.
- Firms need to work with skills providers to develop opportunities for school and university students and leavers who have faced two years of disrupted education. Strategic partnerships are essential to preventing a spiral of decline.

Major trends and issues

Employer surveys have identified key skills gaps within the existing workforce, including time management, leadership skills, customer skills, analytical skills and digital skills. In the [2019 Employer Skills Survey](#), 32% of employers cited being unable to recruit specific skills as the main cause of skills gaps compared to 25% in 2015. [Interviews conducted with employers in 2019](#) identified how employers increasingly value staff who possess a mix of social and behavioural skills.

While employers have indicated that the existing skills gaps are already causing issues in terms of firm performance, participation in training is also declining, [UK employers stand out internationally for their preference to recruit rather than train](#) and employer investment in training in the UK is low relative to that in many international competitor countries. The average volume of training in the UK has declined over recent decades. For example, the average time spent on job-related training over a four-week period declined by 10% over 2011-2018 according to the Labour Force Survey whilst [the annual volume of formal training in the UK household Longitudinal Study fell by 19 % over the period 2011 and 2017](#).

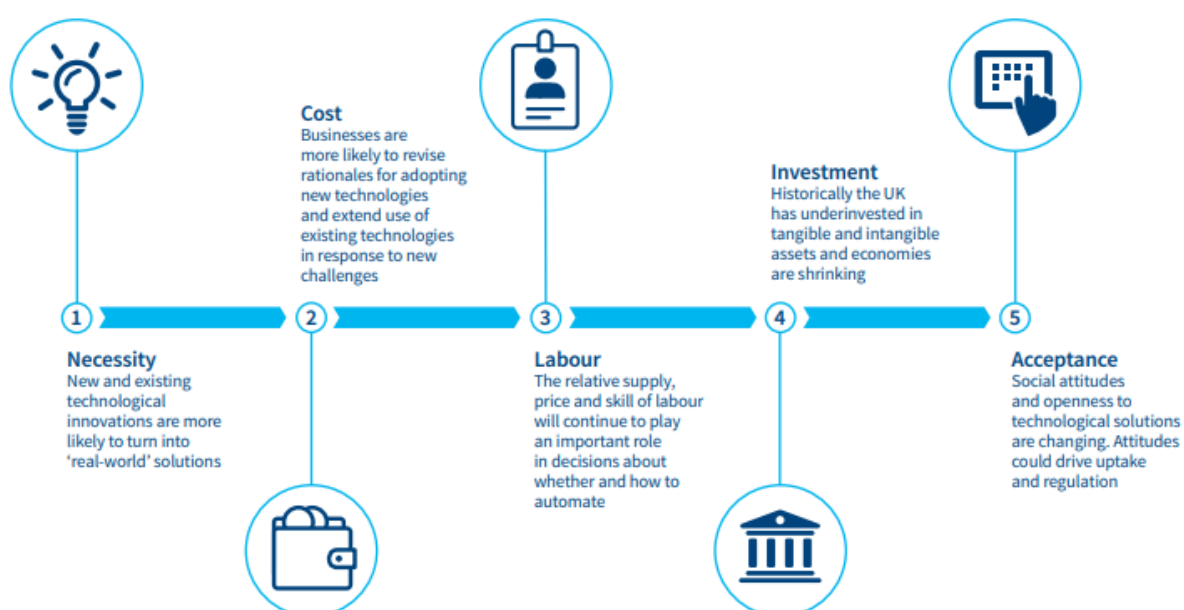
This lack of training provided by employers is compounded by trends relating to employee participation in training. [The low skilled, poorly paid, young and lower qualified are the least likely to undertake training](#). In the 2017 Adult Participation in Learning Survey, fulltime staff were “significantly more likely” to learn for work or career related

reasons than those who worked part-time or were self-employed. In the 2019 Survey, whilst social grade continued to be the most common factor predicting whether an adult would participate in training, participation among those in higher social grades and with higher levels of education also fell. The 2019 survey identifies [particular concerns regarding a continued decline in training participation among working age adults](#).

While the UK population is gradually becoming more qualified, demand for higher qualifications is expected to outstrip the rise in the proportion of the population with degree level qualifications or above. Advances in technology such as automation and big data mean that [7.4% of jobs in England are at high risk of some of their duties and tasks being automated in the future](#). [By 2030, there could be a 13% increase in jobs requiring a bachelor's degree, and 7 million additional workers could find themselves under-skilled compared to the requirements of their job](#).

The pandemic had an immediate impact upon the demands of firms and their workers, with increased adoption of new digital technologies among firms. In the period from late March to late July 2020, over 60% of firms adopted new digital technologies and management practices; and around a third invested in new digital capabilities. This digitalisation of work requires an urgent process of training and upskilling staff: the Industrial Strategy Council suggests that this most important of skills is expected to experience the highest level of under-skilling by 2030 if existing trends continue (see [here](#) and [here](#)).

Covid-19 could accelerate automation in five ways: necessity, cost, labour, investment and acceptance, as demonstrated in the [Figure below showing the extent, nature and pace of technological adoption](#). The role that automation will play for skills will be to replace lower-skilled jobs, requiring reskilling and upskilling of workers if they are to remain in the labour market.



The existing gaps in skills required by employers combined with the current under-funding of training, the inequalities in access to training, and likely continued increases in demand for highly skilled workers clearly demonstrate the urgent need for reskilling and upskilling of the workforce. As [the Industrial Strategy Council has argued](#), employees with a range of social and emotional skills, analytical and interpretative skills, and digital skills will be better placed to adapt to changing job requirements in the eyes of employers.

What might the future look like?

Existing analysis provides insight into how continued growth in automation and AI may impact on skills demand over future decades.

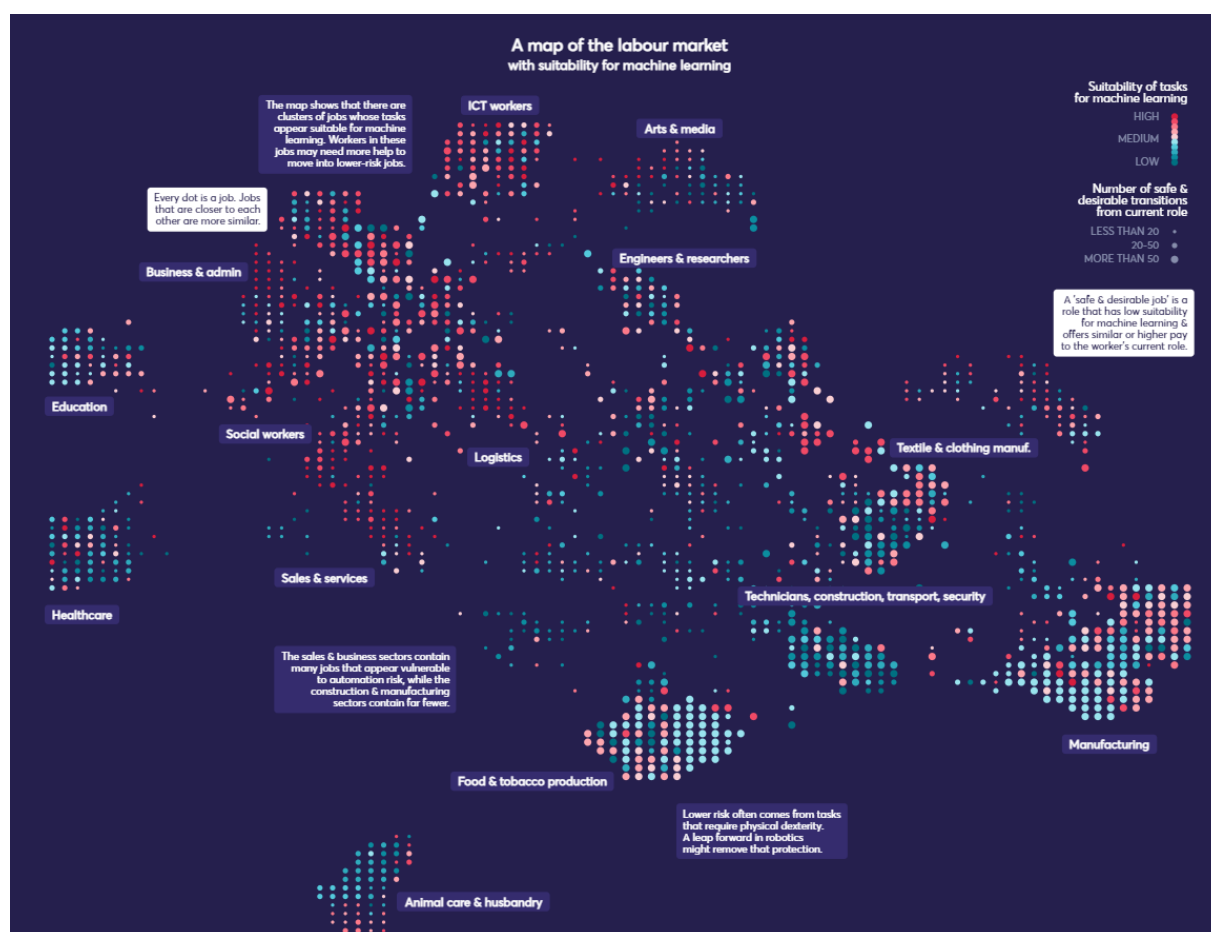
[Modelling by McKinsey](#) suggests that by 2030 skills shortages are likely to be more severe in terms of 'workplace skills' than 'qualifications' and 'knowledge' and that the most widespread under-skilling is predicted to be in basic

digital skills. In line with advances in technology, ‘basic digital’ skills by this point, are likely to be increasingly advanced compared to skills considered ‘basic’ today. Predictions suggest 5 million workers could be acutely under-skilled in basic digital skills by 2030 whilst up to two-thirds of the workforce might face some level of under-skilling.

Other skills in which employers are likely to face acute skills shortages include core management, STEM and teaching and training skills. The analysis suggests that 2.1 million workers are likely to suffer from acute under-skilling in at least one core management skill (leadership, decision-making or advanced communication), whilst 1.5 million workers are likely to face acute under-skilling in at least one STEM workplace skill and 800,000 workers are likely to face acute under-skilling in teaching and training skills which are vital upskilling others.

Some sectors and occupations are likely to be harder hit by the impact of automation than others. It is likely that across Europe, [occupational categories such as STEM professionals and healthcare workers will grow significantly, whilst declines are predicted in relation to the number of office support and production jobs](#). For example, predicted changes in human and health services mean that [by 2025 technology will replace many repetitive tasks such as data entry](#). Caseworkers will instead have more time to develop specific interventions whilst managers will have more time to spend on coaching their teams and developing external partnership opportunities.

[NESTA](#) has used machine learning to produce an [interactive map](#) of the labour market with suitability for machine learning (see below) which identifies the similarities between over 1,600 jobs and compares their risk of automation.



Built on understanding of skills and work activities in each role, it reveals clusters of jobs in which the core tasks appear most suitable for machine learning. Jobs within the sales and business sectors appear to be most vulnerable to automation risk. By contrast, roles in the construction and manufacturing sectors appear to contain fewer jobs which are vulnerable to automation. The map also provides insight into worker resilience by providing guidance on how workers can transition out of ‘at risk’ occupations into lower-risk roles. The research finds that the risk of automation is likely to be hard for employees in certain occupations to escape because occupations that are at high risk of automation tend to require similar skills. It identifies the need to focus reskilling efforts particularly on at-risk workers in sales, customer service and clerical roles.

There are concerns that these sectoral changes could result in greater geographical concentration of job growth over the next ten years. [Research](#) suggests that unless Covid-19 leads to considerable changes in employer and employee

preferences for less dense communities, the same 48 megacities and superstar hubs that contributed 35 percent of the EU's job growth in the past decade could capture more than 50 percent through 2030. For the UK, this trend is likely to mean continued concentration of high-skilled jobs in London and the South East.

Which trends provide greatest opportunity for change?

Over recent decades the West Midlands has suffered from [low qualifications levels, comparatively high unemployment and low/poor jobs growth, albeit there have been recent improvements in skills levels](#). Whilst certain of the predicted trends might at first seem alarming, there are opportunities for firms to respond positively.

By investing in training, firms can build on existing talent within their workforce and prepare themselves for the changing labour market. [Deloitte](#) emphasised that the pandemic reinforced the importance of “understanding what workers are capable of doing than understanding what they have done before”. Emerging from the pandemic employers should “double down on commitments to building a resilient workforce that can adapt in the face of constant change”.

One way in which employers can seek to shape the opportunities made available to, and the incentives for, employees to participate in skills development and use their skills in the workplace is through [developing the quality of managers and a broader institutional culture which champions training](#). This can be facilitated through identifying clear training goals, improving skills development and skills utilisation systems within the organisation and establishment of clear internal career progression paths which raise awareness of training benefits. Improving data relating to training outcomes is also important in inform better training decisions. Managers need to develop their own skills in terms of supporting staff. This should not be limited to day-to-day organisational working requirements but extend to supporting staff to participate in skills development. The impact of the Covid-19 pandemic in accelerating the more widespread adoption of remote and hybrid working requires managers to develop new skills to best manage workers who spend more of their time outside traditional office settings.

The Table below illustrates the importance of investment in upskilling and reskilling to wider economic development and progress in addressing social inequalities in the West Midlands in two contrasting scenarios.

| High levels of investment in upskilling and reskilling | Low levels of investment in upskilling and reskilling |
|--|--|
| Clear skills pathways which enable school leavers, graduates and employees to effectively upskill across the life course | Poor relationships with employers and skills providers (schools, Further Education, higher education) |
| The risk of increased youth unemployment is reduced as, thanks to strong strategic partnerships, school leavers and graduates are equipped with the skills required by firms in the region | Increase in youth unemployment as school leavers and graduates lack the skills required by firms within the region |
| The risk of increased unemployment across age groups is reduced thanks to effective and upskilling programmes within firms and partnerships with skills providers. Training opportunities are fostered within firms by organising developing the quality of managers and upskilling initiatives being actives led by senior management | Increase in unemployment across other age groups as roles are replaced by automation and AI and employees lack higher level skills required to move into new roles |
| Firms in the region are highly competitive nationally and internationally. Productivity is driven by high skills levels and cutting edge technology | Decrease in productivity of firms in the region |
| The region is perceived as an attractive place to live, work and invest | Decrease in attractiveness of the region for firms and students |
| Decreasing health inequalities | Widening health inequalities |
| Decreasing economic inequalities with continued progress in increasing skills and employment levels | Widening economic inequalities |

Adapting to Future Mobilities

Magda Cepeda-Zorrilla, WMREDI

This article is a summary version of a slightly longer paper prepared in early 2021 for a project on Megatrends and Future Cities, which is also informing a Future Business District Study. The article explores urban mobility considering the challenges for transport arising from the shift to home-working; the growth in walking and cycling; car ownership and safety on public transport. It suggests that post-Covid there needs to be greater emphasis on an urban model that prioritises walking and cycling and other forms of micromobility, alongside encouragement of the use of public transport not only as a short-term response but as a long-term national vision.

Introduction

The Covid-19 pandemic has deeply affected the way that cities function, with a shift of activity away from city centres during lockdown. This has negatively affected not only the economy but also the social dynamics and people's health and wellbeing. The lockdowns also led to a reduction in traffic congestion, improved air quality and growth in walking and cycling. This is important because it shows that old problems in the region, such as, poor air quality and lack of physical activity could be addressed by adaptations during the Covid crisis.

In the UK according to [DEFRA and PHE](#), poor air quality represented the largest environmental risk to the Public Health system. The UK has air pollutants such as NO₂ above the guidelines set by the World Health Organization ([DEFRA, 2019](#)). In the UK the NO₂ and particulate matter are traffic-related pollutants ([Sayegh, et al. 2016](#)); therefore a reduction in car use and modal shift towards walking and cycling can help to reduce air pollution and in consequence reduce the number of air pollution deaths.

At the international level, different cities are introducing new urban models to address urban planning issues. Post Covid-19 megatrends vary across the cities but all are based on the same principle: inverting the transport planning pyramid and prioritise walking, cycling ([Nieuwenhuijsen, 2020](#)), as well as encouraging the use of public transport rather than the private vehicles. This means placing people at the centre of the equation.

This article explores future urban mobility and the functioning of places; it considers the challenges for transport from shift to homeworking and hybrid working; the growth in walking and cycling; car ownership, technology and behaviour and safety on public transport.

Key trends and issues

The shift to remote working and the emptying out of cities

Pre Covid-19, in the 37.5% of employees in the Netherlands with sometimes or usually from home, followed by Luxembourg (30.8%) and Belgium (22.7%) ([Walker, A. and Desomer, E. 2020](#)). In the UK the numbers were somewhat lower, but after increasing to over 40% in the first lockdown, it dropped to 36.5% in June 2020 ([Felstead and Reuschke, 2020](#)).

Analysis from 20 countries shows that "more than 20 per cent of the workforce could work remotely three to five days a week as effectively as they could if working from an office. This means that if remote working took hold at that level, there would be three to four times as many people working from home than before the pandemic" ([Lund et al. 2020](#)).

While remote working can lead to a reduction of demand for transport for travel-to-work, hitting financially transport operators and increasing the risk of job losses, therefore "demands an urgent operational response by the public transport systems" ([Wong, 2020](#)), growth in e-commerce (online buying) might have a negative impact on traffic and pollution in as a result of the use of conventional private vehicles for the deliveries ([Nieuwenhuijsen, 2020](#)).

Growth in walking and cycling

Walking and cycling have been encouraged by several cities across the world ([Combs, 2020](#)) during the Covid-19 pandemic. To accommodate social distancing it has been necessary to reconfigure streets to allow more space for pedestrians: one study ([ESRI, 2020](#)) found that "only 30% of Great Britain's footpaths are at least 3 metres wide, 36%

are between 2-3 metres and 34% are less than 2 metres wide". In the West Midlands, maps of Birmingham show that the city does not have the conditions to provide the minimum distance of separation for pedestrians.

In the UK there has been encouragement to cycle in order to commute and as a way of exercising. During the lockdown, cycling increased and 17 % of respondents to the Covid 19 travel change survey said they are likely to cycle more post lockdown ([WMREDI, 2020](#)). To encourage more cycling, the government allocated funds to improve cycling infrastructure; the Department for Transport announced the investment of [£2 billion](#) (part of the previous announcement of [£5 million](#)) to improve infrastructure for cycling in 2020.

The importance of growth in walking and cycling goes beyond the coronavirus outbreak. Pre Covid-19, the West Midlands is a region which already had poor health outcomes. Walking and cycling can help to implement more physical activity into people's lifestyle while commuting and help to reduce the health costs from sedentary lifestyles ([Cepeda, 2019](#)). Even a short walk or cycle can have a positive impact on people's mental and physical health.

Besides health, walking and cycling can have positive effects on the central business districts. [Living Streets](#) in the UK, previously evaluated case studies from several English cities to illustrate and predict the economic and social value of pedestrianising areas. In 2007 "evaluations of pedestrian improvements in Coventry and Bristol (including pedestrianisation, a new civic square, clearer signage and better placement of street furniture) showed a 25% increase in footfall on Saturdays and predicted £1.4 million benefits respectively" ([Living Streets, 2018](#)).

Car ownership

In the UK in 2015 "one third of households were identified as car-free with the lowest levels of car ownership in urban areas"² ([Living Streets, 2018](#)). On average a car is used only 4% of the time and the rest of the time is parked ([Bates and Leibling, 2012](#)). However, street infrastructure is designed to prioritise private cars, and people in a vulnerable situation due to economic barriers, disability, age, sex, employment status suffer most of the negative effects of private car use (such as air pollution and traffic accidents) ([Living Streets, 2018](#)).

During the pandemic, "43 % of public transport users expressed concern about using public transport post lockdown" ([WMREDI, 2020](#)). Such concern can lead to a rise in the use of the use of private cars, which are a source of CO2 emissions and affect the zero-emissions target for 2050 set by the government ([GOV.UK, 2019](#)).

The pressure over the ambitious target is leading to invest in research and development of electric vehicles (EVs) by private companies, but there is also a requirement for governmental investment in infrastructure to adapt the roads and add public charges. Using EVs provides an excellent opportunity to reduce emissions of Carbon Dioxide and other Greenhouse Gases (GHG) ([Jones, et al. 2020](#)) but the encouragement of private EVs will not help to tackle other urban problems such as congestion and social challenges such as physical inactivity. Besides, not everybody will be able to afford these new vehicles ([Walker, A. and Desomer, E. 2020](#)).

Safety on public transport

Public transport is essential to society and is essential for some workers (including key workers) to commute to work. However, during a pandemic public transport is considered by some users to be a risky option, especially when services are crowded. In 2020 43% of public transport users expressed concern about using public transport post lockdown" ([WMREDI, 2020](#)).

Possible future scenarios

What if we do nothing?

- During lockdown there were fewer people driving, fewer people using public transport, less traffic congestion, less air pollution and thus better air quality. But with increased home deliveries, there is potential for traffic and pollution from using conventional (petrol and diesel operated) vehicles for the deliveries.
- Post-lockdown an increase home/ hybrid working is likely to lead to an increase in social inequalities, given that possibilities for such working arrangements are greatest for highly educated workers in high skilled jobs ([Lund et al. 2020](#)).

² Data from the National Travel Survey statistics "Household car ownership by region and Rural-Urban Classification: England, 2002/03 and 2014/15" and Scottish Government: Scottish Household Survey 2015 ([Living Streets, 2018](#))

Evidence of what works

- **Leveraging from emerging transport innovations to reduce the long-term impact from CO2 and other vehicle pollutants.** New technologies such as drones and robots can help to maintain clean and sanitized public areas and public transport. For instance, [drones can spray disinfectants](#), monitor social distancing behaviour and make public service announcements ([ITF, 2020](#)).
- Adopting an approach towards cities centres **offering services within walking distance** can be more open and more green. [Hyper-proximity](#) can be a source of new economic and social models in cities ([Moreno, 2019](#)). An approach of dense but friendly cities can help to boost the economy since pedestrianised streets can help to encourage shopping in an approach that can translate into a more favourable impact on wellbeing for communities. Different approaches include:
 - **15 minute city** where “locals are able to access all of their basic essentials at distances that would not take them more than 15 minutes by foot or by bicycle” ([Moreno, et al. 2021](#)). One example of this is the city of Paris, where the mayor Anne Hidalgo refers to the “de-concentration” of power to be nearer the citizens and “co-constructions” of initiatives and to move to a more circular economy³ ([Power, 2020](#)).
 - **20 minute neighbourhood** which aim to “give people the ability to meet most of their daily needs within a 20-minute walk from home, with safe cycling and local transport options” ([Plan Melbourne, 2020](#))
 - **Hyper-proximity** is a concept introduced by the cities of Groningen and Utrecht in the Netherlands as well as Copenhagen and Aarhus in Denmark. The concept is based on the idea of “developing social, economic and cultural interactions, of ensuring substantial densification, while increasing spaces for public meetings and mixing, travelling by foot or cycling and ensuring that digital technology becomes a factor for social cohesion and inclusion” ([Moreno, 2019](#))
 - **Compact City** refers to a city with “higher densities that are contained and reduce urban sprawl, protect agricultural and amenity land, and make more efficient use of the existing urban land. There is a mixture of uses in close proximity, claimed to encourage sustainable modes of travel such as walking, cycling, and the use of public transport. Environmental, social, and economic benefits are suggested because there would be less dependency on cars and a reduction in GHG emissions. Mixed uses and more people living and working in the same place would give rise to social and cultural vitality, with facilities within easy reach of everybody. Higher densities and the close proximity of a larger population would mean that local businesses become more viable” ([Jenks, M. 2019](#))
- **Support for walking and cycling to boost the economy.** Previous studies have pointed out that improving walking and cycling can help the economy by providing support to industries such as retail ([Littman, 2017](#)). A pre Covid-19 study by the Mayor’s office in Madrid using data from BBAV Bank found that the increased use of walking and public transport had a positive impact on the businesses in the centre ([Ayuntamiento de Madrid, 2019](#)). Although the study only took into consideration three zones of the centre of Madrid, it shows the potential of making more car-free streets.
 - **Investment and planning for bicycle use.** The city of Paris, for instance, has planned to create cycling lanes and make every street in Paris [cycling friendly by 2024](#) (investing £300m) ([Carey, 2020](#)).
 - **Encouraging people to walk more.** Widening the footpaths is likely to positively influence people to walk more in fact; previous research found that pedestrians feel that commuting on foot leaves them vulnerable and at risk of accidents ([Hodgson et al., 2004](#)). Although to face the pandemic temporary street transformations happened, in the longer-term it is important to plan for a complete reconfiguration of space with pedestrians as a priority.
- Reduction of car use, increase in the use of new technologies such as EVs for commercial use and support for the sharing economy. Possible approaches for reducing car use are:
 - **Car-Free City**, which aims to “reduce unnecessary private motorized traffic and provide easy access to active and public transportation” Analysis of the impact of car-free cities have shown that they can help in reducing air pollution and noise levels, increase the level of physical activity and create space for green areas ([Nieuwenhuijsen and Khreis, 2016](#)). An example of this is Vauban in Freiburg, Germany, a neighbourhood

³ The Circular Economy aim is “to trigger a virtuous circle such that goods at the end of their service life are converted into resources for the next generation of goods” ([Panwar and Niesten, 2021](#))

without cars and with sustainable housing ([Melia, 2006](#)) and the city of Hamburg that plans to be car-free by 2034 ([Nuwer, 2014](#)).

- **Urban Superblock:** the aim of this approach is “to reclaim public space for people, reduce motorized transport, promote sustainable mobility and active lifestyles, provide urban greening and mitigate effects of climate change”. Empirical analysis from the city of Barcelona found that creating superblocks can achieve reductions in air pollutants (NO₂); noise, heat and increase in green space and thus reduce the number of premature deaths ([Muller, et al. 2020](#)).
- **Improving and incentivising the use of Public Transport.** In the short-term, it is important to keep reinforcing the cleaning patrols and until passengers’ perceptions of risk reduce. Post pandemic, in the long term PT might not require the levels of current hygiene but “the demand will be for environments that will enable safety effortlessly” ([WMREDI, 2020](#)). This means that shifting to more use of artificial intelligence (AI) and deep learning tools in public transport is important.
 - “Automated vehicles (AVs) and Electric Vehicles (EVs) can be put into public transport service. For instance, last year the project by the Future Automated Bus Urban Level Operation System ([FABULOS](#)) “demonstrated actual public transport operations using AVs in regular traffic in a variety of locations in Europe” ([Schweiger, 2021](#))
 - Adoption of Mobility as a Service (MaaS) and Mobility On Demand (MOD) options can help to allocate demand for transport and help improving mobility. MaaS is based on the use and integration of shared modes of public transport and rideshare systems such as Uber, bike-share and car-share ([MAAS.EU. 2020](#)). MOD on the other hand, “consumers access mobility, goods, and services on-demand by dispatching shared modes, courier services, public transport, and other innovative strategies” ([Shaheen and Cohen, 2020](#)).

Implications

The ultimate goal of any transport policy is to improve people’s well-being by improving access to important activities. During the COVID19 pandemic, government restrictions to travel have affected more heavily vulnerable people. Hence it is essential to rethink the design of cities is essential to solve old problems and improve people’s wellbeing. Because as the World Health Organisation manifesto for a recovery from the COVID-19 pandemic have stated, “we cannot go back to the way we did things before” ([WHO, 2020](#)).

To achieve healthier, cleaner and economically vibrant cities, is necessary to turn to more psychologically informed approaches to understanding shifting behaviours and values.

Policy recommendations

- Infrastructure is essential but this should go hand in hand with a change in values and behaviour.
- “Local transport authorities to produce plans to permanently reshape local transport networks based on active travel shared and public transport and ensure local authorities and bus operators work together to re-plan bus provision, with better integrated, multi-modal networks” ([Better Transport, 2020](#))
- Increase support and guidance for developing staggered working hours and other measures in order to distribute the demand for transport ([HMG.OV. 2020](#))
- Enhance support for individuals and businesses to incentivise mobility start-ups and scale-ups projects ([BEIS, 2021](#)) as well as encourage public-private partnerships to revive the hardest-hit sectors and further enable MaaS” ([Walker and Desomer, 2020](#))
- “Redesign the mobility taxation to stimulate alternatives for car: a higher demand for both green and electric vehicle technologies, as well as public transport with attractive first and last-mile solutions” ([Walker and Desomer, 2020](#)).
- Re-allocation of street space from cars to cycling and walking in order to realize modal shift and climate ambitions ([Walker and Desomer, 2020](#))
- Strong commitment to academia and research institutes since these “will be critical to economic and social recovery from the impacts of COVID-19” ([BEIS, 2021](#))

Infection Rates and Vaccine Update

Alice Pugh WMREDI/WMCA

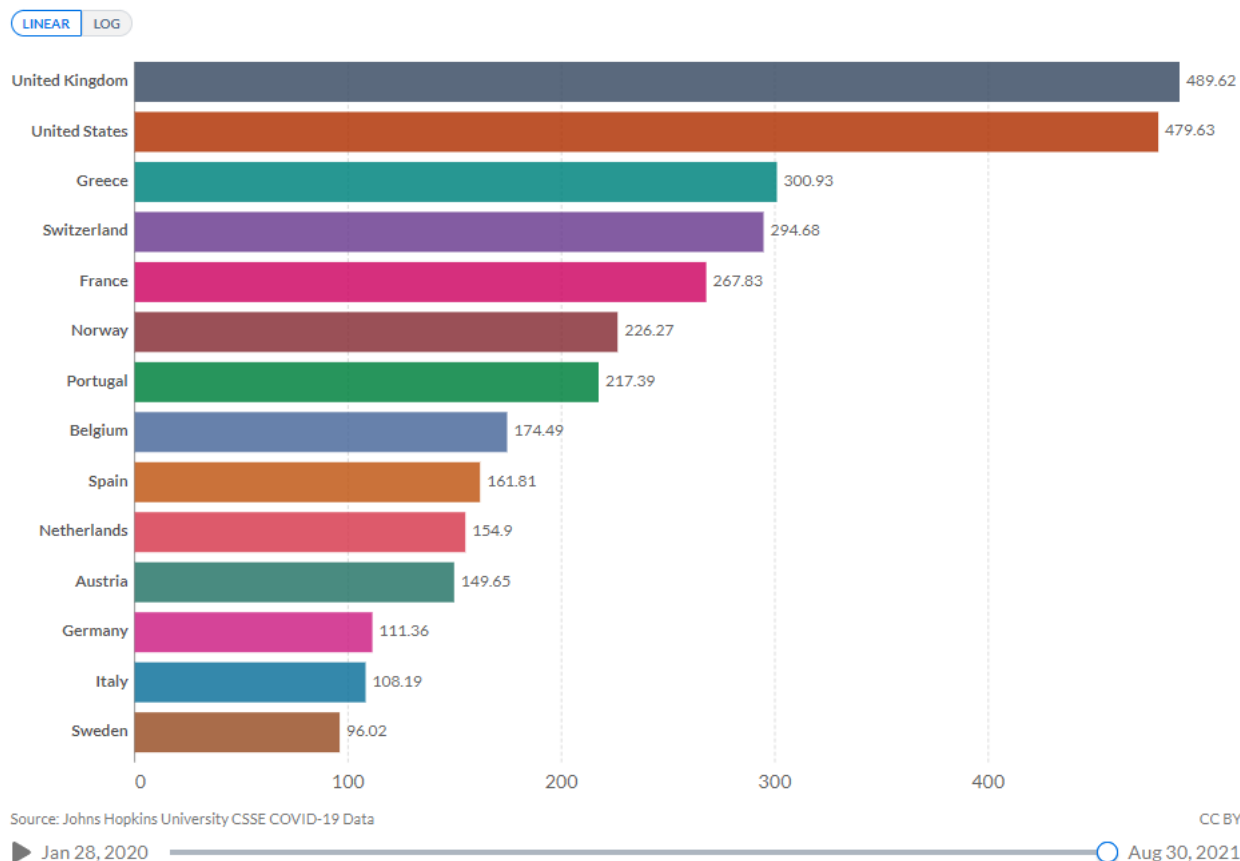
The UK has seen a [resurgence in infection rates](#), and the daily new cases confirmed in the UK is now the highest out of the selected European countries in the graph below. This comes as vaccination rates in the UK slow and social distancing rules are relaxed, especially over the summer as people chose to go on 'staycation' holidays.

[Since 31 December 2019](#) and as of week 2021-33, **212 418 662 cases** of COVID-19 (in accordance with the applied case definitions and testing strategies in the affected countries) have been reported, including **4 436 327 deaths**.

Daily new confirmed COVID-19 cases per million people, Aug 30, 2021

Shown is the rolling 7-day average. The number of confirmed cases is lower than the number of actual cases; the main reason for that is limited testing.

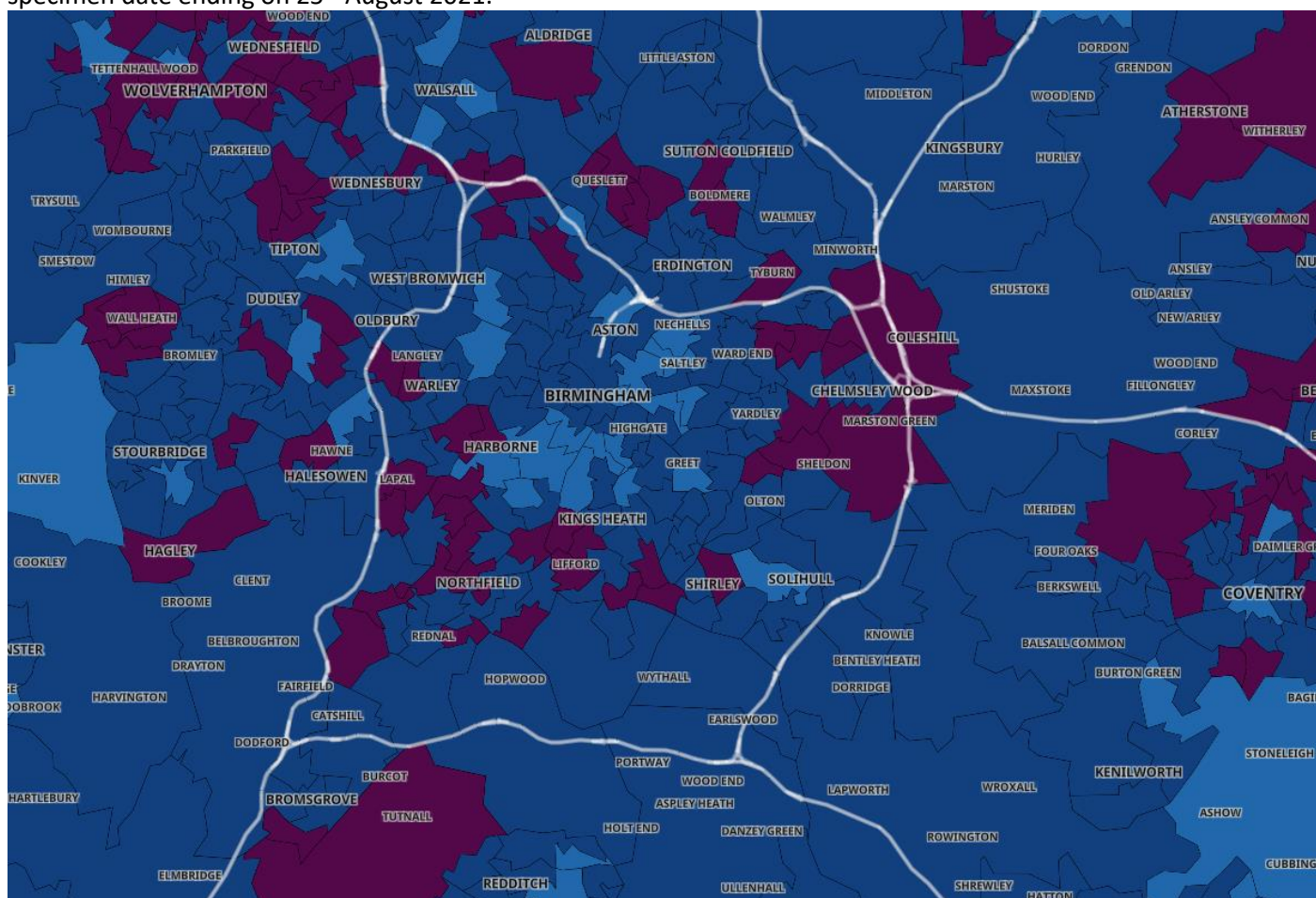
Our World
in Data



Latest [ONS infection survey](#) data (27th August next release 3rd September 2021) states:

- In England, the percentage of people testing positive for coronavirus (COVID-19) increased in the week ending 20 August 2021; we estimate that 756,900 people within the community population in England had COVID-19 (95% credible interval: 710,100 to 806,200), equating to around 1 in 70 people.
- In Wales, the percentage of people testing positive continued to increase in the week ending 20 August 2021; we estimate that 25,200 people in Wales had COVID-19 (95% credible interval: 18,000 to 33,500), equating to around 1 in 120 people.
- In Northern Ireland, the percentage of people testing positive increased in the week ending 20 August 2021; we estimate that 43,300 people in Northern Ireland had COVID-19 (95% credible interval: 33,600 to 53,900), equating to around 1 in 40 people.
- In Scotland, the percentage of people testing positive increased in the week ending 20 August 2021; we estimate that 36,700 people in Scotland had COVID-19, (95% credible interval: 27,600 to 47,200) equating to around 1 in 140 people.

The map below displays weekly data, which are updated every day [here](#). Seven-day rolling rate of new cases by specimen date ending on 25th August 2021.

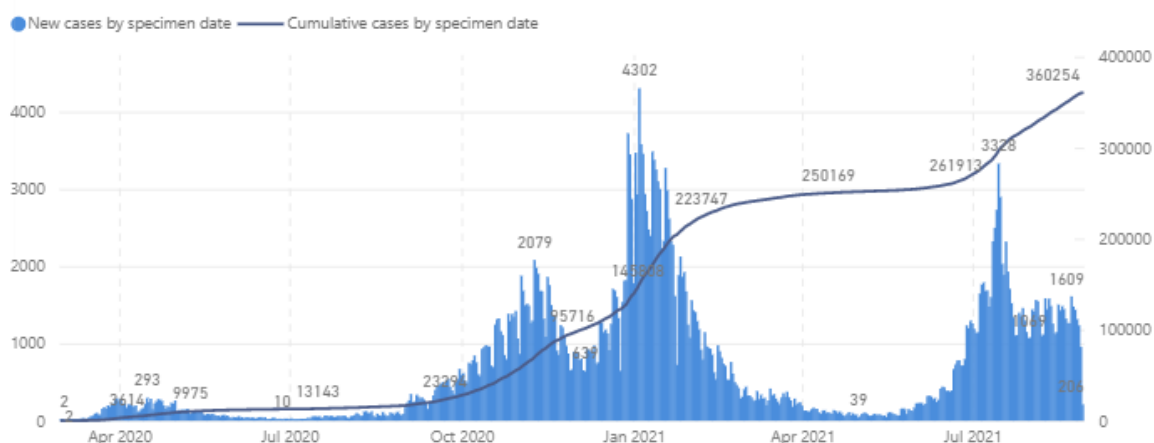


Regional Data

[The Coventry, Solihull and Warwickshire Epidemiology and Intelligence Cell](#) have created a dashboard which looks at covid data on a regional level. Data below:

| Date | New cases by specimen date | New cases by publish date | Cumulative cases by specimen date | Cases in the last 7 days | Rate per 100,000 in the last 7 days |
|----------------|----------------------------|---------------------------|-----------------------------------|--------------------------|-------------------------------------|
| 29 August 2021 | 206 | 1271 | 360254 | 2 | 0.07 |
| 28 August 2021 | 953 | 1070 | 360048 | 2 | 0.07 |
| 27 August 2021 | 1232 | 1577 | 359095 | 2 | 0.07 |
| 26 August 2021 | 1312 | 1580 | 357863 | 9675 | 330.36 |
| 25 August 2021 | 1435 | 1378 | 356551 | 9803 | 334.73 |
| 24 August 2021 | 1477 | 1287 | 355116 | 9850 | 336.34 |
| 23 August 2021 | 1609 | 1273 | 353639 | 9800 | 334.63 |
| 22 August 2021 | 1261 | 1452 | 352030 | 9693 | 330.98 |
| 21 August 2021 | 1263 | 1413 | 350769 | 9576 | 326.98 |
| 20 August 2021 | 1318 | 1310 | 349506 | 9432 | 322.07 |
| 19 August 2021 | 1440 | 1417 | 348188 | 9365 | 319.78 |

All ages



As can be seen from the charts below in the first lockdown infections were higher in the older age groups, whereas now younger people are being infected (nb there will be some effect from higher testing but symptomatic cases presenting for testing are also more prevalent now).

Covid 19 Hospital Activity

A number of [data collections](#) have been implemented to support incident management. The collections were activated at short notice and the content of the collections has evolved as the incident has developed. The data collected is classified as management information. It has been collected on a daily basis with a tight turn round time. No revisions have been made to the dataset. Any analysis of the data should be undertaken with this in mind.

Total reported admissions to hospital and diagnoses in hospital

The table below shows the latest daily rates

| Name | 12-Aug-21 | 13-Aug-21 | 14-Aug-21 | 15-Aug-21 | 16-Aug-21 | 17-Aug-21 | 18-Aug-21 | 19-Aug-21 | 20-Aug-21 | 21-Aug-21 | 22-Aug-21 | 23-Aug-21 | 24-Aug-21 | 25-Aug-21 |
|--------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| ENGLAND | 758 | 694 | 689 | 719 | 776 | 832 | 795 | 824 | 733 | 757 | 726 | 831 | 818 | 843 |
| East of England | 64 | 67 | 49 | 66 | 63 | 69 | 78 | 66 | 65 | 71 | 53 | 70 | 69 | 66 |
| London | 134 | 118 | 129 | 89 | 126 | 111 | 146 | 140 | 120 | 124 | 134 | 147 | 165 | 139 |
| Midlands | 152 | 143 | 124 | 144 | 165 | 166 | 165 | 162 | 145 | 127 | 135 | 161 | 157 | 189 |
| North East and Yorkshire | 139 | 124 | 151 | 158 | 144 | 166 | 138 | 176 | 159 | 155 | 146 | 170 | 149 | 158 |
| North West | 113 | 112 | 102 | 119 | 122 | 125 | 120 | 121 | 104 | 112 | 125 | 107 | 122 | 113 |
| South East | 79 | 59 | 68 | 88 | 86 | 115 | 92 | 93 | 71 | 95 | 83 | 93 | 86 | 86 |
| South West | 77 | 71 | 66 | 55 | 70 | 80 | 56 | 66 | 69 | 73 | 50 | 83 | 70 | 92 |

Mechanical Ventilation beds - occupied by confirmed COVID-19 patients

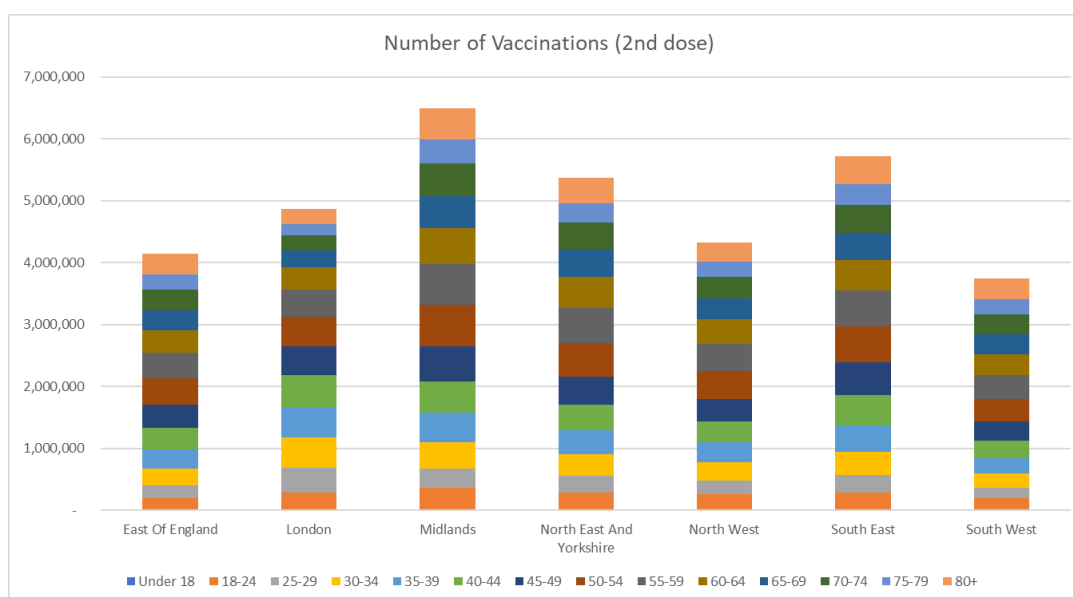
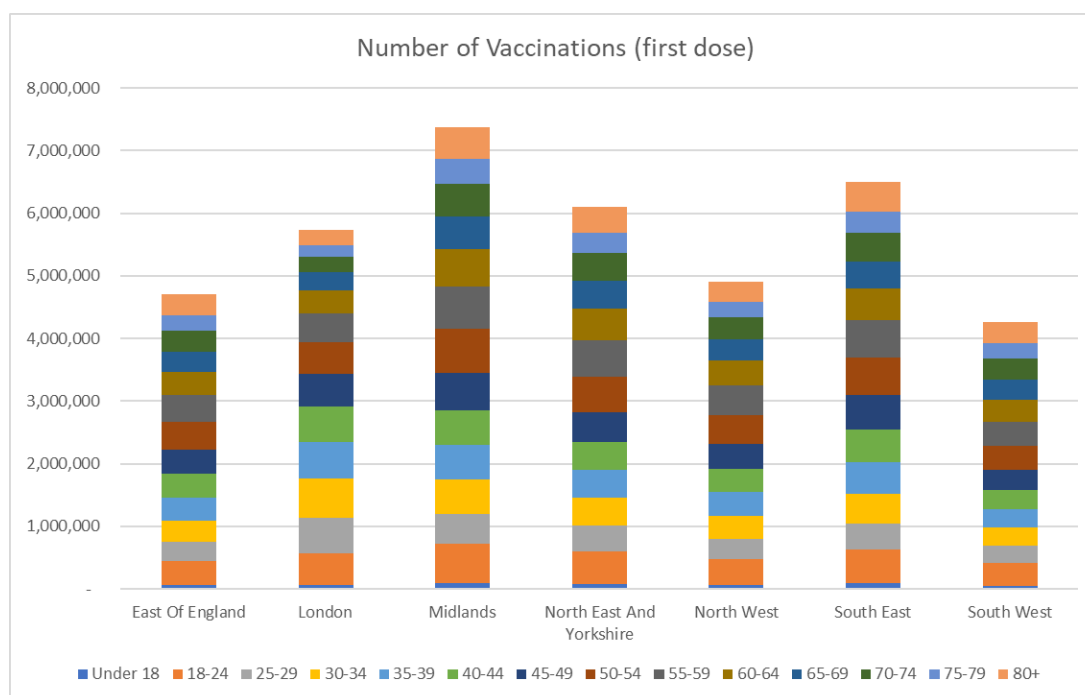
| Name | 14-Aug-21 | 15-Aug-21 | 16-Aug-21 | 17-Aug-21 | 18-Aug-21 | 19-Aug-21 | 20-Aug-21 | 21-Aug-21 | 22-Aug-21 | 23-Aug-21 | 24-Aug-21 | 25-Aug-21 | 26-Aug-21 | 27-Aug-21 |
|--------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| ENGLAND | 797 | 800 | 816 | 825 | 812 | 835 | 857 | 858 | 863 | 845 | 857 | 871 | 872 | 874 |
| East of England | 60 | 63 | 69 | 68 | 64 | 70 | 76 | 67 | 65 | 73 | 79 | 74 | 71 | 75 |
| London | 198 | 208 | 211 | 211 | 212 | 217 | 213 | 216 | 220 | 216 | 214 | 215 | 212 | 215 |
| Midlands | 170 | 163 | 161 | 157 | 164 | 163 | 175 | 176 | 181 | 175 | 180 | 183 | 178 | 185 |
| North East and Yorkshire | 134 | 137 | 137 | 143 | 128 | 134 | 142 | 144 | 146 | 146 | 146 | 147 | 147 | 139 |
| North West | 120 | 109 | 114 | 114 | 107 | 104 | 102 | 108 | 107 | 99 | 107 | 102 | 117 | 116 |
| South East | 58 | 59 | 61 | 64 | 69 | 75 | 81 | 74 | 73 | 73 | 70 | 81 | 83 | 80 |
| South West | 57 | 61 | 63 | 68 | 68 | 72 | 68 | 73 | 71 | 63 | 61 | 69 | 64 | 64 |

Total beds - occupied by confirmed COVID-19 patients (as at 08:00)

| Name | 14-Aug-21 | 15-Aug-21 | 16-Aug-21 | 17-Aug-21 | 18-Aug-21 | 19-Aug-21 | 20-Aug-21 | 21-Aug-21 | 22-Aug-21 | 23-Aug-21 | 24-Aug-21 | 25-Aug-21 | 26-Aug-21 | 27-Aug-21 |
|--------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| ENGLAND | 4,973 | 5,115 | 5,429 | 5,437 | 5,514 | 5,554 | 5,576 | 5,575 | 5,749 | 6,000 | 5,911 | 5,922 | 5,893 | 5,889 |
| East of England | 408 | 418 | 452 | 467 | 455 | 464 | 465 | 464 | 457 | 499 | 502 | 494 | 492 | 491 |
| London | 1,008 | 1,036 | 1,086 | 1,074 | 1,090 | 1,098 | 1,112 | 1,126 | 1,138 | 1,199 | 1,178 | 1,172 | 1,189 | 1,189 |
| Midlands | 980 | 1,002 | 1,063 | 1,052 | 1,067 | 1,095 | 1,129 | 1,119 | 1,185 | 1,209 | 1,199 | 1,217 | 1,180 | 1,204 |
| North East and Yorkshire | 954 | 971 | 1,088 | 1,090 | 1,082 | 1,067 | 1,047 | 1,064 | 1,100 | 1,135 | 1,131 | 1,111 | 1,108 | 1,090 |
| North West | 795 | 813 | 835 | 849 | 904 | 882 | 895 | 862 | 880 | 937 | 922 | 898 | 889 | 864 |
| South East | 449 | 476 | 496 | 507 | 516 | 548 | 537 | 529 | 562 | 590 | 547 | 603 | 592 | 596 |
| South West | 379 | 399 | 409 | 398 | 400 | 400 | 391 | 411 | 427 | 431 | 432 | 427 | 443 | 455 |

Vaccine Update

Between the 8th December 2020 and the [22nd August 2021](#), the Midlands has successfully vaccinated **7,380,915** people with the first dose and **6,491,598** of these individuals have received the second dose as well. Meaning the Midlands has successfully provided the most jabs out of any region including London.



| | % who have had both doses (using ONS denominators) | | | | | | | | | | | | |
|--------------------------|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----|
| | 18-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65-69 | 70-74 | 75-79 | 80+ |
| Total | 38% | 49% | 64% | 73% | 84% | 83% | 90% | 95% | 98% | 94% | 96% | 100%* | 91% |
| East Of England | 39% | 51% | 65% | 74% | 86% | 85% | 91% | 97% | 98% | 94% | 96% | 100%* | 92% |
| London | 36% | 59% | 59% | 64% | 76% | 80% | 84% | 88% | 91% | 88% | 90% | 90% | 81% |
| Midlands | 36% | 44% | 62% | 72% | 84% | 82% | 91% | 95% | 98% | 94% | 97% | 100%* | 93% |
| North East And Yorkshire | 36% | 46% | 64% | 74% | 85% | 82% | 90% | 96% | 98% | 95% | 98% | 100%* | 92% |
| North West | 39% | 47% | 61% | 72% | 83% | 81% | 89% | 95% | 98% | 94% | 97% | 99% | 91% |
| South East | 38% | 52% | 70% | 77% | 88% | 86% | 91% | 97% | 99% | 95% | 96% | 100%* | 92% |
| South West | 39% | 52% | 69% | 78% | 89% | 85% | 92% | 98% | 99% | 94% | 97% | 100%* | 95% |

Weekly Deaths Registered: 20th August 2021

Black Country Consortium Economic Intelligence Unit

The following analysis compares the latest available time period (the week of the 20th August 2021) to the previous week period (the week of the 13th August 2021) for the number of deaths registered and the number of deaths registered related to the Coronavirus⁴.

Across England and Wales, the overall registered death figures decreased from 10,372 in the week of the 13th August 2021 to 10,013 in the week of 20th August 2021. The number of deaths registered that state Coronavirus on the death certificate slightly decreased from 571 people to 570 people over the same period.

Regional level analysis shows that the West Midlands' overall registered death figure decreased from 1,067 people in the week of 13th August 2021 to 1,027 in the week of 20th August 2021. The number of registered deaths related to Coronavirus has increased from 60 people to 82 people over the same period.

There was a total of 720 deaths registered across the WMCA (3 LEP) area in the week of the 20th August 2021. There were 62 deaths registered that were related to Coronavirus over the same period. In comparison to the week of the 13th August 2021, the overall registered death figures in the WMCA (3 LEP) area decreased by 3, with the number of deaths related to Coronavirus increasing by 17 people.

At local authority level in the week of the 20th August 2021, there were fourteen local authorities in the WMCA (3 LEP) area that registered deaths related to the Coronavirus (as seen in the following table). Of the 62 registered deaths; Birmingham accounted for 19 registered deaths, Wolverhampton accounted for 7 and Solihull and Walsall each accounted for 6 of the registered deaths.

Of the 62 registered deaths in the WMCA (3 LEP) involving Coronavirus in the week of the 20th August 2021, 55 were registered in a hospital 4 deaths were registered at a care home, 2 deaths were registered at home and 1 death was registered as elsewhere.

Place and number of deaths registered that are related to Coronavirus in the week of 20th August 2021:

| | Care home | Elsewhere | Home | Hospice | Hospital | Other communal establishment | Total |
|-----------------------------------|-----------|-----------|----------|----------|-----------|------------------------------|-----------|
| Cannock Chase | 0 | 0 | 0 | 0 | 1 | 0 | 1 |
| East Staffordshire | 0 | 0 | 0 | 0 | 2 | 0 | 2 |
| Lichfield | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Tamworth | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| North Warwickshire | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Nuneaton and Bedworth | 0 | 0 | 0 | 0 | 2 | 0 | 2 |
| Rugby | 0 | 0 | 0 | 0 | 1 | 0 | 1 |
| Stratford-on-Avon | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Warwick | 0 | 0 | 0 | 0 | 1 | 0 | 1 |
| Bromsgrove | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Redditch | 0 | 0 | 0 | 0 | 3 | 0 | 3 |
| Wyre Forest | 2 | 0 | 0 | 0 | 2 | 0 | 4 |
| Birmingham | 0 | 1 | 2 | 0 | 16 | 0 | 19 |
| Coventry | 0 | 0 | 0 | 0 | 3 | 0 | 3 |
| Dudley | 1 | 0 | 0 | 0 | 4 | 0 | 5 |
| Sandwell | 0 | 0 | 0 | 0 | 2 | 0 | 2 |
| Solihull | 0 | 0 | 0 | 0 | 6 | 0 | 6 |
| Walsall | 1 | 0 | 0 | 0 | 5 | 0 | 6 |
| Wolverhampton | 0 | 0 | 0 | 0 | 7 | 0 | 7 |
| WM 7 Met. | 2 | 1 | 2 | 0 | 43 | 0 | 48 |
| Black Country LEP | 2 | 0 | 0 | 0 | 18 | 0 | 20 |
| Coventry & Warwickshire LEP | 0 | 0 | 0 | 0 | 7 | 0 | 7 |
| Greater Birmingham & Solihull LEP | 2 | 1 | 2 | 0 | 30 | 0 | 35 |
| WMCA (3 LEP) | 4 | 1 | 2 | 0 | 55 | 0 | 62 |

⁴ Please note that up-to-date counts of the total numbers of deaths involving COVID-19 are published by Public Health England (PHE) -ONS figures differ from the PHE counts as the latter include deaths which have not yet been registered.

Source: ONS, Death registrations and occurrences by local authority and health board, 1st September 2021

Black Country Consortium Economic Intelligence Unit

On the 26th August 2021, Office for National Statistics (ONS) released 'economic activity and social change in the UK, real-time indicators'. These statistics are experimental and have been devised to provide timely information. The following information contains UK flight data, footfall data, online job adverts, final results from Wave 37 of the Business Insights and Conditions Survey (BICS), national company incorporations and voluntary dissolutions and results from Wave 72 of the Opinions and Lifestyle Survey (OPN).

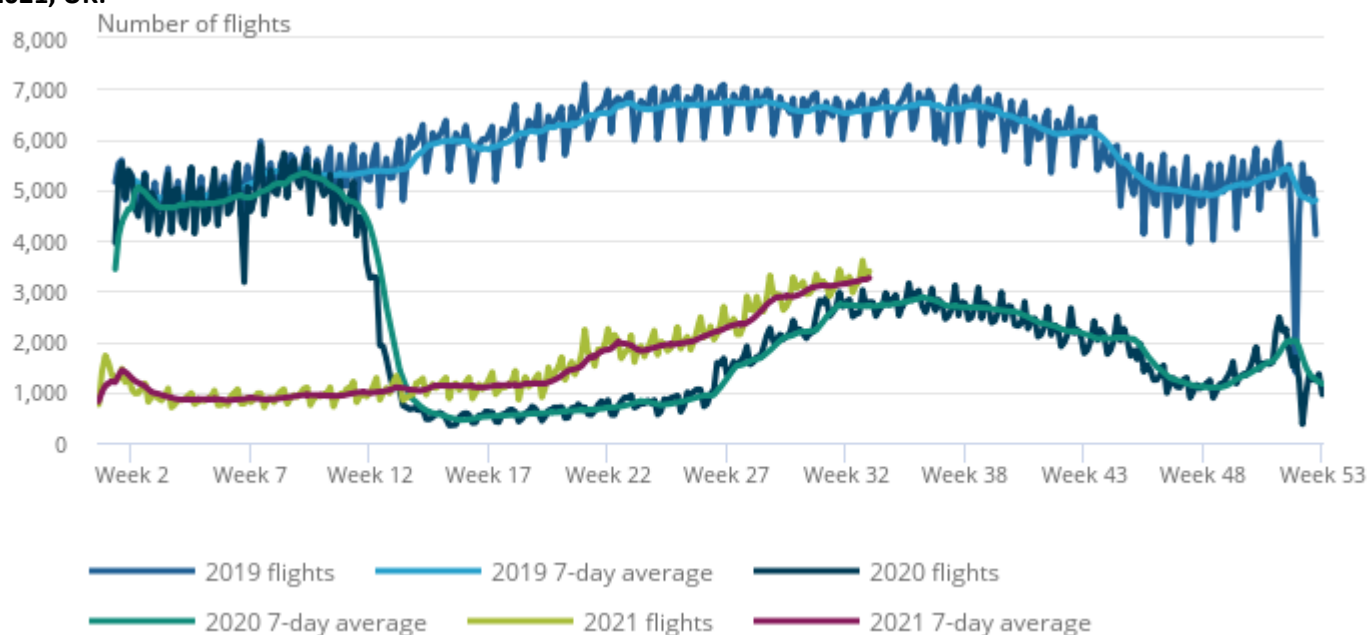
UK Flight Data

Flight data includes international arrivals and departures to and from the UK (including Crown Dependencies) and domestic UK flights, but excludes overflights (flights that pass over UK territory). This includes commercial flights carrying passengers and cargo as well as non-commercial flights such as private and military flights. Data from EUROCONTROL does not include information on the volume of passengers or cargo carried on UK flights. Especially in the context of the COVID-19 pandemic, flights might not be operating at full capacity and therefore trends in passengers and cargo will differ from trends in flights presented below.

In the week ending 22nd August 2021, the seven-day average number of UK daily flights was 3,256; this is a 4% increase from the previous week. The seven-day average number of UK daily flights has increased by 128% from the week ending 23 May 2021; which was the week that international travel was allowed to restart and the UK government implemented the travel traffic light system).

The average number of flights in the latest week was 49% of the level seen in the equivalent week in 2019. In the latest week, when compared with the equivalent week in 2020 (when UK travel corridors were still in place), the seven-day average number of daily flights was at 120% of its 2020 level.

Number of daily flights, non-seasonally adjusted, and seven-day moving average, 2nd January 2019 to 22nd August 2021, UK:



Source: European Organisation for the Safety of Air Navigation

Online Job Adverts

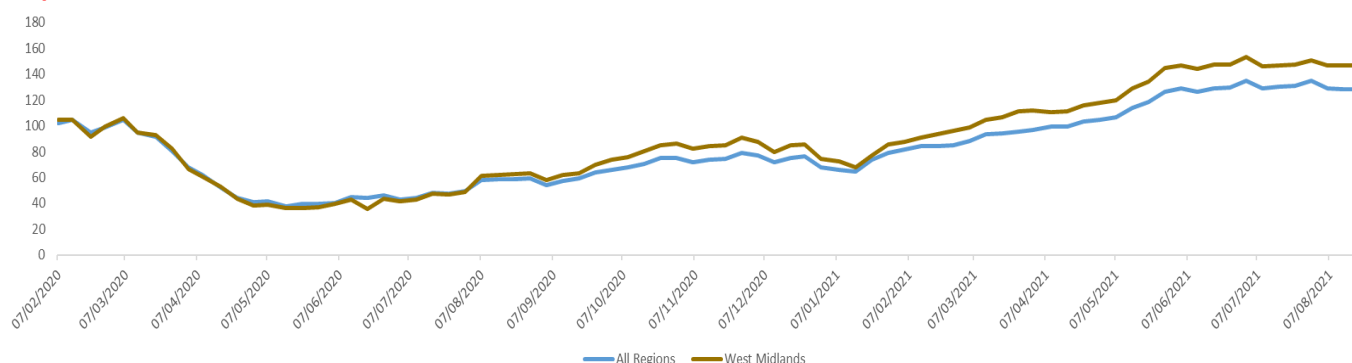
These experimental figures are taken from online jobs adverts provided by Adzuna. The Adzuna categories do not correspond to SIC categories and therefore not comparable with the ONS Vacancy Survey. Please note, Index of job adverts on Adzuna by category, 100 = average job adverts in February 2020.

Nationally, between the 13th and 20th August 2021 total online job adverts increased by 0.2 percentage points. On the 20th August 2021, total online job adverts were at 128.3% of their average level in February 2020. Out of the 28 categories (excluding unknown) 15 decreased from the previous week, with the highest decrease by 4.7 percentage points in 'scientific/QA' (to 116.9%), in contrast, transport/logistics/warehouse increased by 14.8 percentage points (to 349.6%). Of the 28 categories, there were five categories that were below their February 2020 levels these were; 'legal' (71.4%), 'energy/ oil and gas' (92%), 'graduate' (92.5%), 'education' (91.3%) and 'accounting/finance' (98%).

Out of the 12 UK regions, there was a decrease in four regions, with a further one region remaining unchanged. Between the 13th and 20th August 2021, the West Midlands region online job adverts decreased by 0.7 percentage points. On the 20th August 2021, total online job adverts for the West Midlands were at 146.5% of their average level in February 2020.

The following chart shows the index of job adverts on Adzuna by category, 100 = average job adverts in February 2020, overall all regions and the West Midlands region, 7th February 2020 to 20th August 2021:

Graph



Footfall

According to Springboard, in the week to 21st August 2021, the volume of overall retail footfall in the UK decreased by 2% from the previous week (week to 14th August 2021). This is the first week to see a decrease in footfall across the UK since the week to 19th June 2021. In the latest week, footfall in high streets saw the greatest decrease of 2%, while footfall in retail parks and shopping centres both saw slight decreases of 1%, compared with the previous week.

In the latest week to 21st August 2021, overall retail footfall was at 80% of the level seen in the equivalent week of 2019. Comparing retail locations, footfall at retail parks remained the strongest relative to pre-coronavirus pandemic levels, at 97% of its equivalent 2019 level. Meanwhile, shopping centres were at 75% and high streets were at 74%.

In the week to 21st August 2021, retail footfall saw week-on-week percentage decreases in 9 of the 10 UK countries and English regions, the largest of which was in Scotland, which fell by 5% over the week. Footfall in Greater London, however, remained unchanged over this period. In the same week, relative to the levels seen in the equivalent week of 2019, retail footfall continued to be strongest in the South West of England at 85%, followed by the South East of England (83%), the North and Yorkshire (82%), and Wales (82%). In contrast, retail footfall was weakest in Scotland, Northern Ireland and the East Midlands, all at 76% of the level seen in the equivalent week of 2019.

National Company Incorporations and Voluntary Dissolution

Companies House data shows for the UK, there were 12,236 company incorporations in the week to 20th August 2021. This is down from 13,173 recorded in the previous week and also lower when compared to the same week in 2020 (16,966) but higher than the same week in 2019 (12,179).

Also, for the week to 20th August 2021, there were 4,825 voluntary dissolution applications, a decrease from 5,865 recorded in the previous week. The number of voluntary dissolution applications was higher than levels seen in the same week of 2020 (4,142) and the same week in 2019 (4,462).

The final results from Wave 37 of the Business Insights and Conditions Survey (BICS) based on the 5,107 businesses surveyed across the West Midlands that businesses have a presence in with a response rate of 24% (1,224) and to 3,032 businesses that are head quartered in the West Midlands, with a response rate of 22.5% (681). Please note, businesses were asked for their experiences for the reference period 26th July to 8th August 2021. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (9th August to 22nd August 2021). Also, the data used is unweighted for regions and response levels can be low so the following results should be treated with caution when evaluating the impact of COVID-19. Due to weighted data being available for the UK a comparison has not been included.

Trading and Financial Performance

98.1% of responding West Midlands businesses were trading over the reference period. Less than 1% of businesses temporarily closed or temporarily paused trading and 1% of businesses had permanently ceased trading.

Businesses were asked how their turnover for the last two weeks compared to normal expectations for the time of year. Excluding 'not sure' responses, 28.8% of trading businesses in the West Midlands reported their turnover had decreased by at least 20%. However, 46% of trading businesses in the West Midlands reported that their turnover was unaffected and approximately 14.8% reported their turnover had increased by at least 20%.

Excluding 'other' and 'not sure' responses, 58.1% of responding West Midlands businesses reported the main reason for the change in the business turnover in the last two weeks was due to COVID-19. While 1.7% reported the main reason as the end of the EU transition period and 10.9% reported that it was due to COVID-19 and the end of the EU transition period.

Profits

Businesses were asked in the last two weeks how profits compared with normal expectations for the time of year. Excluding 'not sure' and 'not applicable' responses, 27.6% of trading businesses in the West Midlands reported profits had decreased by at least 20%. However, 45% of trading businesses in the West Midlands reported that profits had stayed the same and approximately 12.4% reported their profits had increased by at least 20%.

International Trading

Businesses were asked in the last two weeks, had their businesses' exporting or importing of goods or services been affected when compared to normal expectations for the time of year. Excluding 'not sure' responses, 24.9% of exporting businesses in the West Midlands reported their businesses were still exporting but less than normal. Of those businesses who continued to trade and import, 17.1% in the West Midlands were importing less than normal.

61% of West Midlands businesses who were exporting reported that they had not been affected and 67.9% reported that importing had not been affected.

1.5% of businesses in the West Midlands are exporting more than normal and 3.5% are importing more than normal.

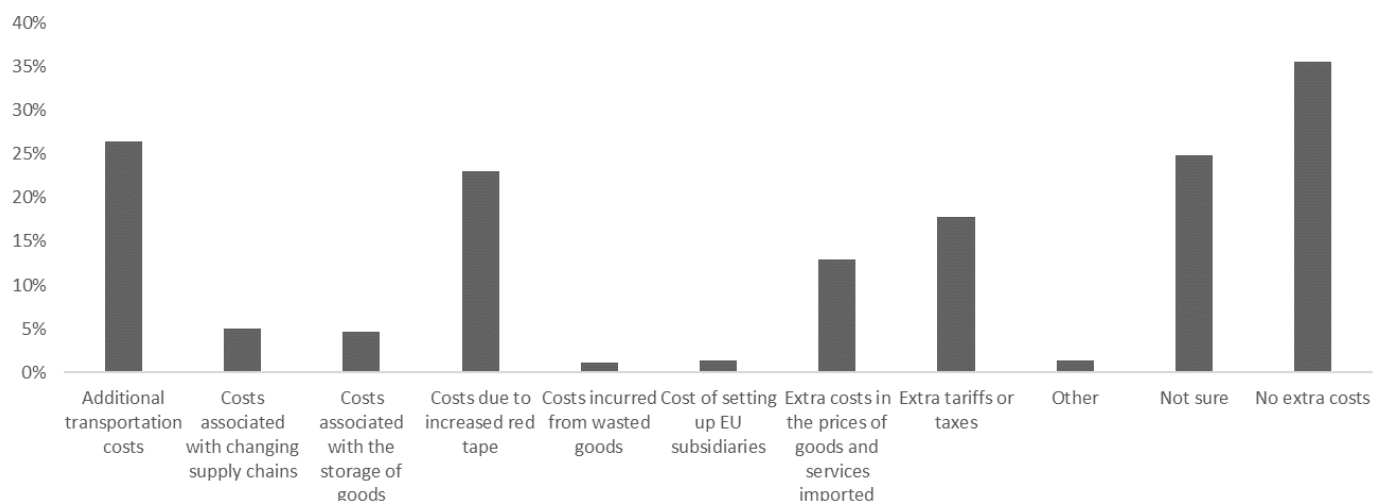
2.7% of businesses in the West Midlands have not been able to export in the last two weeks and 1.1% of West Midlands businesses have not been able to import in the last two weeks.

Supply Chains

Businesses were asked if they had made changes to supply chains due to the end of the EU transition period. 7.7% of responding West Midlands businesses reported they had. Where businesses stated they had made changes, the highest response at 54.8% of responding West Midlands businesses reported they were using more UK suppliers.

26.4% of responding West Midlands businesses reported extra costs due to additional transportation costs.

The following table shows the reason for any extra costs due to the end of the EU transition period:



Where applicable, 4.4% of responding West Midlands businesses reported they had not been able to get the materials, goods or services from the EU in the last two weeks. 5.5% of West Midlands businesses had only been able to get the materials, goods or services due to changing the supplier or finding an alternative solution.

1.7% of responding West Midlands businesses reported that they intended to open new branches or subsidiaries in the EU in the next 12 months.

Where applicable, 7.3% of responding West Midlands businesses reported they had not been able to get the materials, goods or services from within the UK in the last two weeks. 9.9% of West Midlands businesses had only been able to get the materials, goods or services due to changing the supplier or finding an alternative solution.

Stock Levels and Stockpiling

Businesses were asked how stock levels for the last two weeks compared to normal expectations for the time of year. Excluding 'not sure' and 'not applicable', 13.3% of West Midlands businesses reported stock levels are lower than normal. 43% of West Midlands businesses reported stock levels had not changed and 10% reported stock levels are higher than normal. Coronavirus was still the main reason as to why stock levels had been impacted in the West Midlands at 36.5%.

6.7% of responding West Midlands businesses reported they were stockpiling goods or materials. 66.7% of West Midlands businesses were sourcing the stockpiled goods or materials from UK suppliers. 37% of responding West Midlands businesses reported they were stockpiling metals and materials.

Capital Expenditure

Excluding 'not sure' and 'not applicable' responses, 5% of responding West Midlands businesses reported capital expenditure was higher than normal for the last two weeks when compared to normal expectations for the time of year and 51.1% of responding West Midlands businesses reported capital expenditure had not been affected. Although, 13.5% reported capital expenditure was lower than normal and 6.3% reported capital expenditure had stopped.

Excluding 'other' and 'not sure' responses, 67.4% of responding West Midlands businesses reported the main reason for the change in the business capital expenditure was due to COVID-19. While 4.3% of West Midlands businesses reported it was due to the end of the EU transition period and 2.7% reported the main change was due to super-depreciation.

Grants Applied, Received, Finance Agreements and Further Schemes

13.7% of West Midlands businesses had applied for Local Restrictions Support Grant – England (95.8% have received). 1.6% of West Midlands businesses had applied for a grant from the Lockdown Business Fund – Wales (10.2% have

received). 1.2% of West Midlands businesses have applied for a grant from the Strategic Framework Business Fund Scotland (7.8% have received) and 4.2% had received a grant from Local Restrictions Support - Northern Ireland. While 73.1% of West Midlands businesses have not applied for any of these grants and 4.2% had not received any of these grants.

6.4% of responding West Midlands businesses have received small business grant, 7.3% have received a sector-specific grant and 4.1% have received an additional Restriction Grant.

24.5% of West Midlands businesses have received government-backed loans or finance agreements during COVID-19.

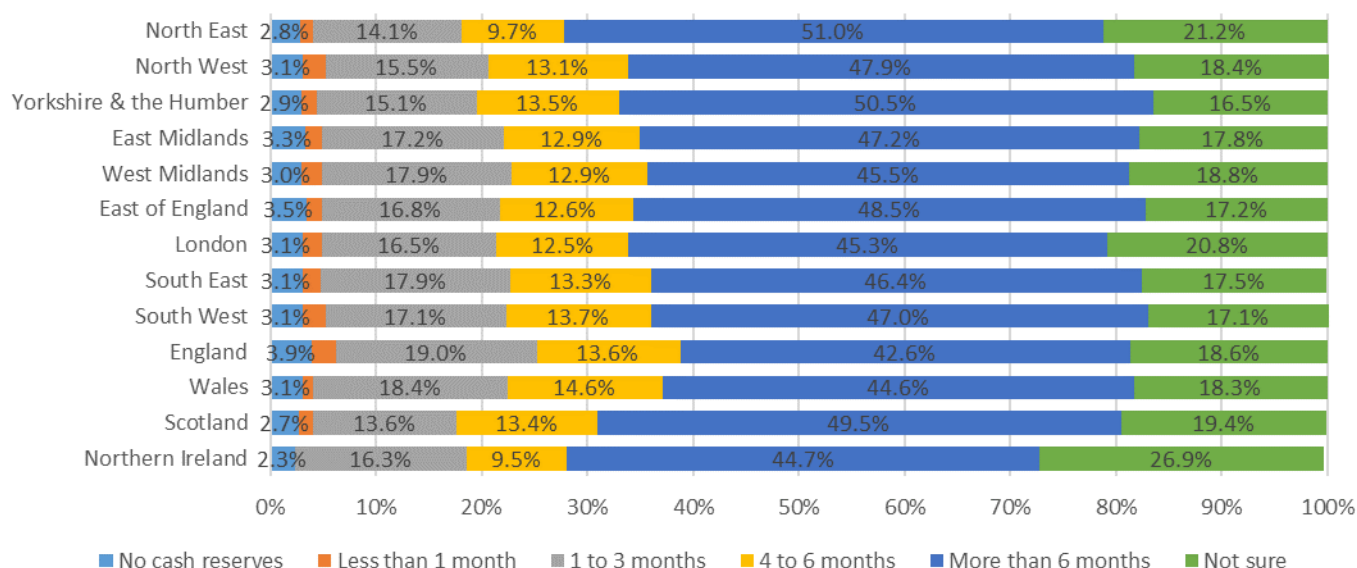
9% of West Midlands businesses are using or intend to use Kickstart Job Scheme for young people. 52.4% are using or intend to use the Coronavirus Job Retention Scheme and 4% of West Midlands businesses are using or intend to use Recovery Loan Scheme. While 34% of West Midlands businesses are not using or intend to use either of these schemes.

64.6% of responding West Midlands businesses reported that the support received from the initiatives or schemes allowed the business to continue trading.

Cash Reserves

3% of responding West Midlands businesses that have not permanently stopped trading have no cash reserves.

The following graph shows across the UK regions how long cash reserves will last:



Business Confidence, Debts and Insolvency

In the West Midlands, 72.8% of responding businesses had high confidence in surviving over the next three months. 19.6% had moderate confidence of survival, 1.5% had low confidence and 5.9% were not sure.

Businesses were asked over the last month how the businesses debt repayment compared with turnover, excluding 'not sure' responses, less than 1% of West Midlands businesses reported repayments were more than 100% of turnover with 2.8% reporting repayment was between 50% and 100% of turnover. 2.9% of West Midlands businesses reported repayments were between 20% and 50% of turnover and 21.9% reported repayments were up to 20% of turnover. 40.3% of responding West Midlands businesses reported no repayments.

12.9% of responding West Midlands businesses reported repayments have increased by up to 20% when compared with normal expectations for the time of the year. 5.3% reported repayments have increased between 20% and 50% and 7.0% of West Midlands businesses reported repayments have increased by more than 50%. Over the next month, 2.6% of West Midlands businesses expect repayments to increase a little. However, 71.3% of West Midlands businesses have high confidence to meet debt obligations with 16% of businesses with moderate confidence.

Excluding 'not sure' responses, less than 1% of responding West Midlands businesses reported they were at severe risk from insolvency and 7% of West Midlands businesses reported they were at moderate risk. 50.7% of West Midlands businesses reported a low risk of insolvency and 32.9% reported no risk.

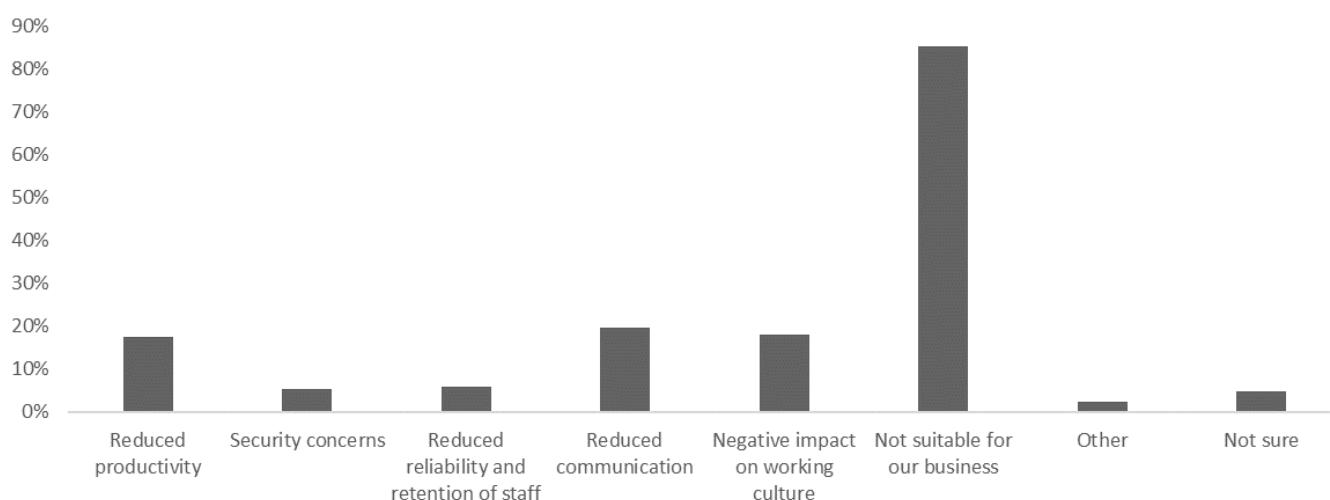
Homeworking

31.8% of responding West Midlands businesses reported they intended to use increased homeworking as a permanent business model going forward. 42.2% of West Midlands businesses reported they did not intend to use this business model with a further 26.1% unsure.

The top reasons that West Midlands businesses reported as to why they intend to use increased homeworking as a permanent business model was; 82.6% for improved staff wellbeing, 49.6% for increased productivity and 41% reported the ability to recruit from a wider geographical pool.

Of the 42.2% of West Midlands businesses who reported they did not intend to use increased homeworking as a permanent business model going forward, the main reason at 85.5% reported it was not suitable for the business.

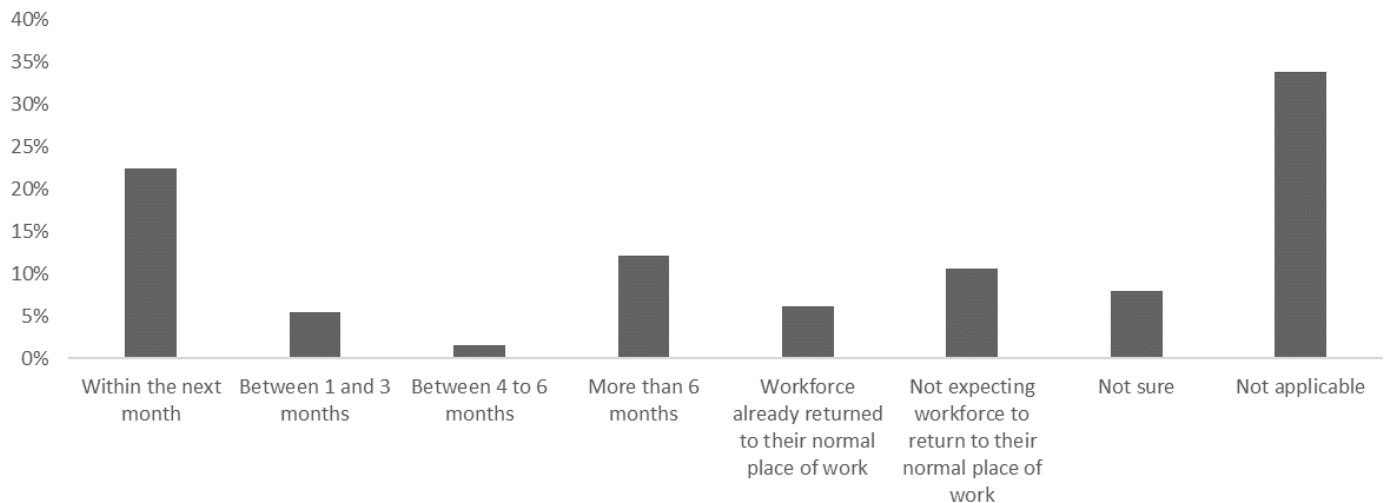
The following graph shows for West Midlands businesses why they do not intend to use increased homeworking as a permanent business model going forward:



Return to Workplace

6% of responding West Midlands businesses reported the workforce had already returned to their normal place of work, with a further 22.5% expecting the workforce to return within the next month.

The following chart shows for the West Midlands region when/if they expect the workforce to return to the normal place of work:



Expected Redundancies

5.0% of responding West Midlands businesses expect to make redundancies in the next three months. 68.8% of West Midlands businesses reported they did not expect redundancies over the next three months. The remaining 26.2% were not sure.

Social Impacts of the Coronavirus

The following refers to the period of 18th to 22nd August 2021. Please note, only a selection of indicators at a regional level are included in the below. From September 2021 this release is moving to a fortnightly publication.

Well-Being, Loneliness and Perceptions of the Future⁵

Mean personal well-being scores for life satisfaction was 7.2 in the West Midlands (7.1 GB), worthwhile was 7.6 in the West Midlands (7.3 GB), happiness was 7.1 for West Midlands adults (matching GB average) and anxious was recorded at 3.5 for West Midlands adults (3.8 GB).

5% of adults in the West Midlands reported low levels of life satisfaction (7% GB). 4% of West Midlands adults reported low level of feeling worthwhile (7% GB). 12% of responding West Midlands adults reported low level of happiness (11% GB) and 25% reported high levels of anxiety (30% GB).

22% of adults in the West Midlands reported to often/always or some of the time to feeling lonely (24% GB). While 51% reported hardly ever or never feeling lonely in the West Midlands (49% GB).

17% of West Midlands adults believe it will take 6 months or less before life returns to normal (16% GB). While 23% of West Midlands adults believed it will take 7 to 12 months (16% GB). 24% of West Midlands adults think it could more than a year to return back to normal (28% GB) and 8% for the West Midlands adults thought it would never go back to normal (9% GB).

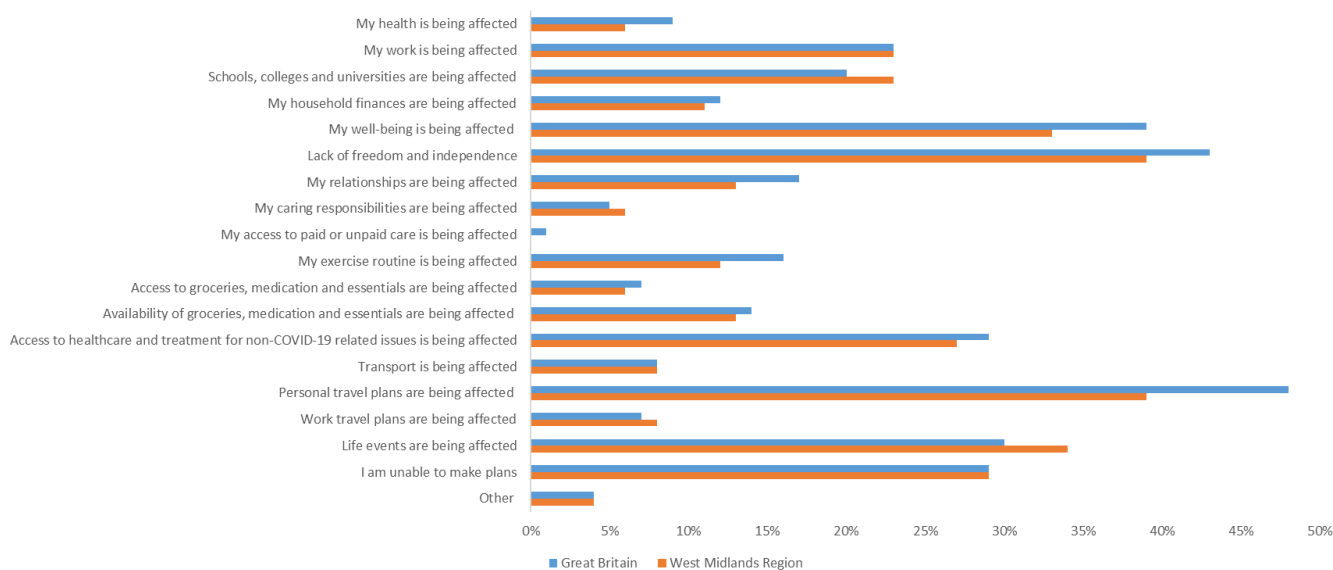
Impact on People's Life Overall

In the West Midlands, 46% of adults reported they were very or somewhat worried about the effect COVID-19 was having on their life (48% GB). 22% of responding West Midlands adults reported that they were somewhat unworried or not at all worried (20% GB).

39% of responding West Midlands adults reported personal travel plans were being affected due to COVID-19 (48% GB).

⁵ Please note for this section: each of these questions are answered on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely". High anxiety is defined as a score of 6-10 for the question "How anxious did you feel yesterday?". Low levels of life satisfaction, feeling worthwhile and happiness are defined as a score of 4 or below for their respective questions.

The following chart shows for the West Midlands region and Great Britain-wide how COVID-19 were affecting adults between 18th and 22nd August 2021:



34% of working adults in the West Midlands who say their work had been affected due to COVID-19 (33% GB).

HEADLINES

| SECTOR | KEY INSIGHTS |
|--------------|--|
| Cross Sector | <p>Outlook</p> <p>There is continued evidence of rising business confidence in the Midlands, staying strong during August despite a dip from the previous month. The latest Business Barometer from Lloyds Bank Commercial Banking found confidence in the region fell three points during August to 27 per cent but remained above the year-to-date average of 23 per cent. There has also been another drop in the region's unemployment rate, reflecting that more people continue to be in work across the West Midlands, while the FSB's most recent Small Business Index shows that West Midlands firms have experienced strong growth and hiring aspirations.</p> <ul style="list-style-type: none"> • Half of the region's small business owners (50%) predicted that their business performance will improve in the next three months. • In addition, confidence for the next 3 months was positive in Q2 2021 (at 23%) despite showing a decline from Q1 2021 (at 39%). <p>Furthermore, recent changes to isolation rules have been described as a "sensible step" by business leaders. Industries, including car manufacturers and food distributors in particular, have welcomed the news as they faced major disruption due to the number of staff having to self-isolate after being 'pinged' by the NHS app last month. Business leaders are urging the Government to go further by constantly reviewing the list of key workers that are exempt from having to isolate and reintroducing free testing for businesses in order to minimise disruption and stem the flow of the virus.</p> <p>The current positivity exists within a period of sustained uncertainty, with external issues surrounding Covid and Brexit causing businesses many issues. In particular:</p> <ul style="list-style-type: none"> • Price rises and product shortages remain a cause for concern, particularly for the construction and manufacturing sectors. In some instances, this is requiring businesses to halt production lines and making them unavailable to operate at full capacity. Costs have doubled in some sub-sectors, for example for specific metals and materials, and are being passed to the end customer. One example is a business in the aerospace industry struggling with the supply of components, although previously building stocks, now unable to obtain key materials. • Many firms are still facing financial hardship and will require additional support from government as they look to get their operations off the ground after nearly 16 months of forced closure. The pandemic has not impacted all businesses equally and some firms now find themselves burdened with substantial debts for the first time. • The Government is being urged to take this into consideration as it looks to wind down existing support schemes over the coming months so as not to undo the good work that has been done to support businesses over the past year. • The number of firms reporting hiring challenges has increased significantly in recent weeks, reflecting a skills & jobs crisis. This has multiple facets: <ul style="list-style-type: none"> - Candidate Availability - Ongoing concerns and uncertainty, stemming from the pandemic, over job security contributing to a severe drop in candidate availability. Add to this a large increase in counter offers from existing employers to retain staff, some of whom have successfully interviewed for, and subsequently turning down, positions with competitors. This has led to a general increase in hourly rates, salaries and the introduction of attractive up front financial incentives to candidates. |

| SECTOR | KEY INSIGHTS |
|--------|---|
| | <ul style="list-style-type: none"> - Risks to Inward Investment Opportunities – Example of one regional company delaying investment plans because they are struggling to recruit the 70 outstanding roles required. Risk of this organisation changing their plans and looking elsewhere. - Growing Sector Roles – A distinct increase in demand for staff in the Marketing & Sales sector as companies continue to diversify and also look to start to try to win new business in new areas/sectors. - Less Desirable Jobs – Businesses that offer lower paid, physical, undesirable and jobs with unsociable hours are struggling the most to recruit staff. Often unskilled roles that pay the standard rates of pay cannot compete with businesses that are naturally able to offer better working conditions and equal or slightly better pay. This includes the care sector and HGV drivers. - Permanent Positions - Strong demand for staff, and the further rollback of pandemic restrictions, leading to a sharp increase in the number of people placed into permanent job roles in August as businesses look to retain staff in an employee's market. <p>EU Exit</p> <p>The labour shortages problem is, according to many businesses' experiences, caused and exacerbated by the UK's exit from the EU. Businesses are struggling to recruit people for less desirable roles, such as HGV drivers, cleaners and care staff, due to the return of EU nationals to the EU, and reduction in flow of EU migration to the UK.</p> <p>Some businesses in the region still also report that Brexit has caused ongoing disruption at borders. Reliability of carriers is a problem, timeliness, losing shipments, delays of incoming goods stuck at the border. Also, price increases imposed from suppliers across the EU due to transport costs and burdensome paperwork. In addition:</p> <ul style="list-style-type: none"> • Freight Forwarders are reporting that there is no let up to the challenges of cross border trade with the EU. • Companies are continuing to work their way through the changes resulting from EU Exit, whilst some have reached an equilibrium and established new ways of working others continue to come up against new requirements. This is frequently the case where destination countries customs bodies are interpreting the UK/EU trade deal in different ways. • Local businesses have suggested it would be helpful to have advisors available to audit export procedures to avoid problems with EU trading. <p>A new study exploring the impact of Brexit on business reveals nearly half of West Midlands firms have experienced difficulty importing goods from the EU since 1 January. And 34 per cent have found it more difficult exporting goods to the EU since the end of the transition period. The report – ‘Post Brexit Transition Period – An impact analysis on businesses based in the West Midlands Combined Authority area’ – has been released by the Greater Birmingham, Coventry & Warwickshire and Black Country Chambers of Commerce.</p> <p>The report reveals:</p> <ul style="list-style-type: none"> • 47 per cent of local businesses have found it more difficult importing goods from the EU since 1st January • 34 per cent of local businesses have found it more difficult exporting goods to the EU since 1st January • 40 per cent of respondents had experienced increased costs and 28% have experienced border delays as a result of the UK's departure from the EU • 35 per cent of small and micro sized businesses lack the capacity to deal with the additional documentation requirements for trading with the EU |

| SECTOR | KEY INSIGHTS |
|--|--|
| | <p>Enquiries</p> <ul style="list-style-type: none"> • Mental Health – Expected to be a long running concern, the mental health of employers and employees as we continue to emerge from the pandemic is a regular conversation when engaging with businesses. • Grants – A strong appetite for investment continues as businesses push ahead with postponed, pre-COVID, growth plans and post-COVID recovery strategies. A continued positive outlook and increase in confidence as companies continue to look to seek grant funding to support capital purchases, IT infrastructure upgrades, premises fit outs and upgrade projects. In addition to this there are good signs of a return to innovation and the development of new products. • B2B Trade and Networking – A positive and continued appetite to procure locally or within UK borders continues. • Planning Queries – Increase in businesses looking for planning guidance where they are reconfiguring unused office or factory space to maximise productivity. • Inward Investment – Continued interest from businesses outside of the region. One recent example of a business looking to utilise abandoned rail facilities to expand an already successful national rail test business. • Skills/Staff Development – Linked to efforts to retain staff, many businesses looking for support for the upskilling and personal development of staff. In some instances this has formed part of longer term succession plan, particularly with family owned businesses. • Diversification into PPE – Businesses that had previously diversified into the supply of PPE and associated products now reporting that this market is now saturated and it is becoming more difficult to be competitive. These business are looking at old and new products, services and markets, following on from reports that Covid increased innovation in the West Midlands. • Businesses in the region have suggested search for sites of significant size and affordability is a real issue when looking to grow and expand operations. <p>Programmes and Support</p> <ul style="list-style-type: none"> • KickStart: Despite some positive appointments, the lengthy application process is deterring applications. • Bounce Back Loans: More SMEs are looking to postpone repayment of loans leading to concerns this is merely delaying a problem. |
| <p>Hospitality and Leisure</p> | <ul style="list-style-type: none"> • Many events related businesses are showing signs of a strong post-COVID recovery as they have completed a full month's trading since restrictions were fully lifted for this sector. Tourism has been given a similar boost, as reported in local press. • Positive news although at the expense of the mental health of business owners along with the personal financial impact, which has left a high number "battle weary" after nearly 18 months of the pandemic. • Also, hospitality businesses are still struggling to find staff as Covid and Brexit has caused many EU nationals to return to the EU or students to move back home, who were a main source of employees. |
| <p>Business and Professional Services</p> | <ul style="list-style-type: none"> • In the past 2 months there has been a constant stream of businesses that employ c.40 staff looking to downsize to smaller offices that accommodate 25% - 33% of their staff at once. • The majority of BPFS businesses are keen not to move back to office-based working 5 days a week - the general trend is to be in 1-2 days per week from September and home-working for the remainder. • The government's latest proposals on business rates will create more difficulties for businesses appealing their business rates than benefits, according to rating experts at Colliers. |
| <p>Manufacturing</p> | <ul style="list-style-type: none"> • Manufacturing demand continues to increase across most sectors as consumer confidence returns. |

| SECTOR | KEY INSIGHTS |
|--------|---|
| | <ul style="list-style-type: none"> However, there are increasing concerns over furlough ending. This is combined with varied demand and ability to access materials and many manufacturers are still struggling to deal with rising supply chain prices and labour access: <ul style="list-style-type: none"> Availability and increased cost of raw materials including but not exclusive to steel, aluminium, building materials in c plywood and concrete. Shortage of semi-conductors particularly in automotive, impacting on ability to build cars and extending delivery timescales for new vehicles – both cars and commercial vehicles. Concerns around repayment of Government debt whilst trading conditions still difficult. Access to/availability of skilled workforce inc. welders, CNC programmers. Continued exceptionally high costs of importing containers (materials and components) with no change anticipated over the next year, combined with the increased cost and limited availability of UK transport (driver shortage). |

NEW ECONOMIC SHOCKS

| COMPANY | LOCATION | SECTOR | SOURCE/DETAIL |
|-------------------------------------|------------|-------------|--|
| GKN Automotive | Birmingham | Automotive | <p>Union members at the GKN Automotive factory in Birmingham have begun receiving ballot papers in the dispute over the decision by parent company GKN Melrose to close the site next year.</p> <p>If there is a yes vote, strikes could begin in mid-September.</p> <p>Industry experts believes that the factory, which produces drivelines for vehicles, is critical to the successful electrification of the UK's automotive industry. Melrose, however, are intent on closing it, with the work being transferred abroad and 500 jobs lost.</p> |
| Automotive Industry | Nationwide | Automotive | <p>Car production fell to its lowest July levels since the 1950s as 'pingdemic' staff shortages and the global shortage of microchips hit UK manufacturers. Just under 53,500 cars were built in July, a fall of 37.6% on the same month last year, and the worst July performance since 1956, according to figures from the Society of Motor Manufacturers and Traders (SMMT).</p> |
| Nando's | Nationwide | Hospitality | <p>Nando's has shut 45 restaurants after suffering a shortage of chicken as industry suppliers warned supply chain disruption is "not going away".</p> |

NEW INVESTMENT, DEALS AND OPPORTUNITIES

| COMPANY | LOCATION | SECTOR | DETAIL & SOURCE |
|--|------------|----------------|---|
| IM Properties | Birmingham | Infrastructure | <p>Detailed plans for an industrial unit expected to create almost 1,500 jobs in Birmingham have been recommended for approval ahead of a planning committee.</p> <p>IM Properties is seeking reserved matters approval to build an approximately 2.3 million sq ft property, known as Unit B, on the wider Peddimore development site.</p> |
| Project CELERITAS, led by Sprint Power | Birmingham | Low Carbon | <p>A Birmingham project has been awarded £9.7 million of Government and industry funding to develop an ultra-fast charging electric vehicle battery.</p> <p>The project will deliver batteries capable of charging in 12 minutes could save more than 12 million tonnes of carbon</p> |

| COMPANY | LOCATION | SECTOR | DETAIL & SOURCE |
|--|---------------------------------|---|--|
| | | | emissions. The project will develop the ultra-fast charging battery for electric and fuel cell hybrid vehicles, accelerating the adoption of electric vehicles. |
| Transport for West Midlands | Perry Barr, Birmingham | Public Transport | The on-going regeneration of Perry Barr ahead of the Birmingham 2022 Commonwealth Games has taken another step forward with the approval of plans for a new bus interchange. The scheme is part of the overall £30.9m transport interchange development which includes the neighbouring Perry Barr railway station. This is also undergoing a major redevelopment and will be the principal station for Alexander Stadium – the focal point of next summer’s games. |
| Economy-wide | Region-wide | All | Businesses in the Midlands attracted £309 million of Venture Capital (VC) investment in Q2 of 2021, according to KPMG’s latest Global Venture Pulse Survey. It was raised across 35 deals in the region, representing 5 per cent of all UK deals by volume during the quarter. The businesses with the most significant investments in the Midlands in Q2 were Alcester-based Quanta Dialysis Technologies, who secured £245m in funding, and Birmingham-based Boomin who secured £35m in funding. |
| IVC Evidensia with St Modwen | Longbridge, Birmingham | Infrastructure Health | New plans have been unveiled to build a state-of-the-art veterinary hospital and research facility in Birmingham. IVC Evidensia is working with developer St Modwen on the project in Longbridge which is expected to be operational in 2023, subject to planning consent. The hospital, which will create up to 150 jobs, will contain research, treatment, diagnostic, laboratory and administrative space. |
| Contechs | Warwick | Engineering | An engineering group is creating more than 100 jobs after completing the purchase of new offices in Warwick. |
| SOCOTEC Central | Coventry | Professional, scientific and technical Activities | Nearly 50 jobs are to be created at the UK’s largest construction material testing laboratory in Coventry at SOCOTEC Central – and people of all ages and experience are being encouraged to apply. SOCOTEC moved into new 50,000 ft2 premises at the Leofric Business Park in Progress Close, Binley. |
| West Midlands Combined Authority | Black Country and wider regions | Housing development | A derelict site in the Black Country in one of three in the Midlands to be named as part of a brownfield regeneration scheme. The West Midlands Combined Authority (WMCA) has confirmed the multi-million-pound investment package to kickstart the development of nearly 400 homes and new commercial premises at three sites. |
| Professional Polishing services | Black Country | Manufacturing | A Black Country manufacturer that puts the finish on boutique hotels, nuclear reactors and life-saving medical equipment has just completed its latest investment drive. Professional Polishing Services (PPS), which has increased its workforce by 25% since lockdown eased, has just installed a new dull polishing line to help it boost capacity and achieve its target of £2m sales by the end of 2022. The company has spent more than £250,000 on the latest purchase. |
| Newton LDP | Warwickshire | Property | A Midlands-based land, development and property agency has completed its first major land sale just two months after it launched with the sale of a prime housing |

| COMPANY | LOCATION | SECTOR | DETAIL & SOURCE |
|------------------------------------|--------------|-----------|---|
| | | | development site in Warwickshire that will deliver up to 620 homes. Newton LDP were instructed by the landowners and Catesby Estates to lead on the marketing and sale of the site at Glasshouse Lane in Kenilworth, which has now been sold to Vistry Partnerships and Milverton Homes. |
| Regional REIT | Region-Wide | Property | A regional office giant has announced the acquisition of 31 multi-let office assets for a combined total of over £235m. Regional REIT announced the move for the major portfolio of assets from Squarestone Growth - a total of 1.6m sq ft of property, home to over 200 tenants. |
| MG / Summit Garage | Dudley | Car Sales | A Black Country car dealership has expanded its showroom to meet growing demand after securing a new funding deal. Summit Garage in Dudley has used the £150,000 loan from Lloyds Bank to double the capacity of its outlet in Himley Road which will enable the MG franchise to increase the number of cars on display. |
| Kite Packaging | Warwickshire | Retail | Plans for an almost £100m-turnover packaging company to construct a new headquarters in Warwickshire have received the go-ahead. Kite Packaging has earmarked part of the Rolls-Royce site in Ansty for the scheme, which would provide a base for 211 employees. The plans include office, research and development, as well as light industrial, space, with the three-storey building having a external floor area of 305,000 sq ft. |
| Convergence Group | Shirley | Telecoms | A telecoms provider has secured a new funding package worth up to £16 million to support an acquisition and help it deliver improved connectivity services to more than 800,000 organisations across the UK. Shirley-based Convergence Group, which works with businesses, health authorities and retailers, obtained an initial £8 million revolving credit facility from NatWest to expand its offer. |

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
For any queries please contact the lead Authors:

Rebecca Riley R.Riley@Bham.ac.uk

Alice Pugh A.Pugh@Bham.ac.uk

Delma Dwight Delma_Dwight@blackcountryconsortium.co.uk

Anne Green A.E.Green.1@bham.ac.uk

This programme of briefings is funded by the West Midlands Combined Authority, Research England and UKRI (Research England Development Fund)



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

