East Birmingham – North Solihull (EBNS)

Stage 1: Baseline

Project ref 39470

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THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING

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Executive summary

This baseline report looks at East Birmingham North Solihull (EBNS). Our objective is to identify the nature of the underlying social, economic and policy conditions in the area so that later vision and strategy work can make well-informed choices - changing life in EBNS for the better.

We approached the work from a predominantly economic perspective, and have set out findings under the topic areas set out below.

We have looked at **the future opportunity.** The economic geography of the UK will change as a result of HS2. East Birmingham North Solihull (EBNS) is on the eastern side of the West Midlands conurbation, and will benefit from being within easy reach of two HS2 stations – one within its boundaries at the UK Central Hub in Solihull, and one very nearby at Curzon Street in central Birmingham. Jobs growth in and around the area is expected at a series of strategic employment sites. Critically, these new jobs are accompanied by major investments in local connectivity, including a Metro extension, new bus rapid transit services, new railway stations on the classic rail network, and higher local rail service frequencies. The economic fundamentals are therefore falling into place, making ENBS a place of great potential.

This report puts this opportunity in its **historic, geographical and demographic context.** To properly capitalise on its potential, evidence demonstrates that EBNS needs to innovate to respond to economic change, and create opportunities for its young, growing, diverse, but relatively deprived population.

We have looked at **jobs in EBNS.** EBNS is a strategically important industrial area for the West Midlands conurbation, but evidence suggests that employment concentrated in traditionally low paying sectors.

Educational performance is strongly indicative of future deprivation, making e**arly years, school and FE provision** an important dimension of future success in the area. Educational attainment in EBNS underperforms against comparator areas at Early Years, Key Stage 1, Key Stage 2, and GCSE. This underperformance feeds through into subsequent educational stages, with the result that EBNS has relatively low levels of higher education participation amongst 18 and 19 year olds. However, this state of affairs can be changed: evidence from London suggests that big cities can improve performance over time. Whilst circumstances are very different, London has achieved very significant improvements in schools' performance in the last 17 years.

Evidence around **skills and labour market participation** suggests that skills levels are a major factor in attracting investment and generating growth. However, EBNS workers are less skilled than average. Labour market participation is also worse than average, and these effects vary by gender and ethnicity. Long term and youth unemployment is more prevalent than average. Looking at the evidence around the public sector response to these difficulties, there is evidence that the combination of multiple actors, strategic overload and short term is funding is unhelpful in getting solutions in place.

Poor **health and wellbeing** (H&W) can be simultaneously both a cause and effect of social and economic problems. Evidence suggests that health and wellbeing will improve as the economy improves over the longer term, but we cannot ignore the importance of the 'here-and-now': prevention and early intervention on lifestyle-related conditions will remain very important. Long term sickness and disability in EBNS is around 50% higher than the English average, with the biggest single reason for claiming sickness-related benefits being mental and behavioural disorders. Evidence also suggests that child mental health in EBNS is amongst the worst in Birmingham. However, interventions can help deal with these problems, and start to break down the resulting cycle of inter-generational disadvantage that these problems create. Obesity and air pollution are also major problems for EBNS. Evidence suggests that a multi-disciplinary H&W theme group could be useful in attacking these problems.

Executive summary (cont.)

We looked at the evidence around **crime and anti-social behaviour.** Reported instances of anti-social behaviour in EBNS are lower than the English average, but violent/sexual offences, burglary, criminal damage and vehicle crime are higher. Reported drug crime is at the English average rate, but some evidence suggests that these crimes may be under-reported.

Work is looking at how public sector agencies might **join up the public estate** to create public services which are both more efficient to deliver, and more effective. Work is still emerging, but there is evidence to show that opportunities exist to co-locate services in EBNS using innovative new configurations of the public estate. Evidence suggests that joint working will be needed to realise these benefits.

The future will see the creation of several very high quality **connectivity** corridors through the EBNS area, generating very useful labour market effects which better connect workers to job nodes. However, not everywhere is better connected as a result of investment, and new bus routes could be useful. Evidence also suggests that further 'last mile' walking and cycling work could improve local connectivity to rail, metro and sprint investments, as well as creating health and wellbeing benefits. Park and ride at Metro stops and improved train stations could also be helpful in attracting growth on the public transport system.

We looked at the evidence around **accelerating place investment.** The economic modernisation sought in EBNS depends fundamentally on the market's ability to reconfigure built assets on housing and employment sites in response to economic and social change. Getting markets working efficiently will be critical, because public investment alone cannot work at the speed and scale necessary to make the changes desired. Viability evidence presented here suggests that transport investment can help by raising currently low development values – so creating market-viable development opportunities. Retail is struggling in parts of EBNS, and evidence suggests that EBNS needs an updated approach to retail centres, perhaps integrated with housing change.

This report has pulled together evidence on **the delivery of physical change.** EBNS could use best practice from London, where local authorities and the GLA put together brownfield land opportunities and new transport investment to create 'Opportunity Areas'. Opportunity Areas focus public investment and private developer interest, and are then used to marshal management attention, planning, infrastructure and funding around these points. Evidence suggests that three new EBNS 'Opportunity Areas' (at Bordesley Park, Stechford/Eastern Triangle and Chelmsley Wood) could be investigated, and help EBNS to make the step change it needs. (UK Central is effectively already an Opportunity Area). Evidence suggests that it could be very useful to assemble a cross-sector 'growth coalition' for the area to create innovative solutions for EBNS.

Evidence suggests that there is scope for an innovative approach to the **evaluation of change** in EBNS, and an opportunity to pilot the use new datasets to track delivery and change.

Standing back, the evidence shows that EBNS is a place of very significant untapped potential. The fundamental drivers around jobs growth and connectivity suggest that the future is bright. Consistent progress on education, skills, and health and wellbeing, together with work to accerate place investment, could see the benefits from transport investment maximised.

A new growth trajectory for the area is the prize, creating very real benefits for the current and future residents of the area.

Introduction

Introduction

This report is the baseline study which looks at the East Birmingham North Solihull area (which we call 'EBNS' for short). This report was written by PBA, with OCSI. We have also had specialist inputs from URBED and Housing Futures Ltd.

This is the first stage of a five-part process. Stage 2 will look at the development strategy and vision, Stage 3 will look at viability, Stage 4 at implementation strategy, and Stage 5 at funding models.

With this baseline, we are trying to avoid the creation of an indiscriminate and formulaic statistical dragnet. Our purpose is not to describe every aspect of life in EBNS. Instead, our objective is to identify the nature of the underlying social, economic and policy conditions in order that later vision and strategy work might make better informed decisions that will change the area for the better. We also hope that the information contained here will

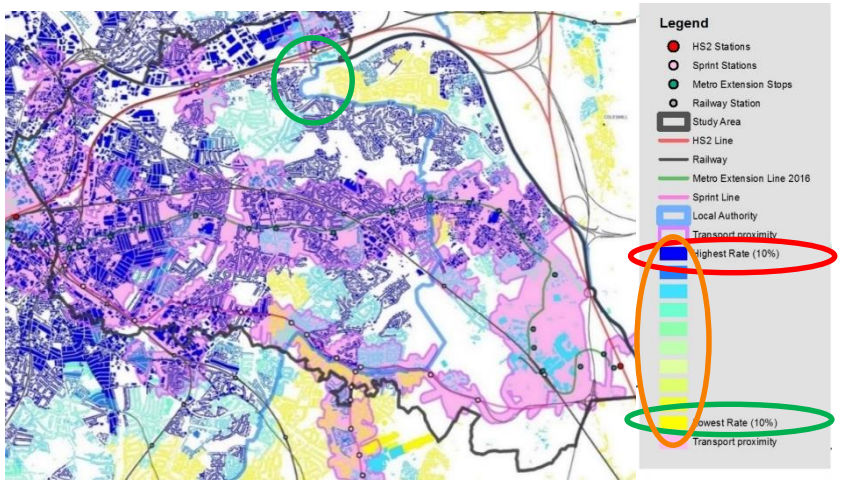
- **Inform private sector investors** about the context for their investment plans, and in particular show how the public sector might respond to growth opportunities by assisting labour and land markets
- **Inform the network of public sector investors** about the broader context of change, possibly helping the development of infrastructure business cases, HCA strategy, and West Midlands Combined Authority investment choices;
- **Encourage engagement at an early stage with the development of a cross-stakeholder growth agenda**; and
- **Provide the first step in the creation of a long-term evaluation framework**.

Whilst we have attempted to cast the net wide, we have inevitably had to make choices about what has been included and what has been excluded from this baseline. Different teams may have made different choices. We are relaxed about this. We hope the subsequent stages of work can add to the baseline for what is going to be a long term and complex attempt to put East Birmingham and North Solihull on a new growth pathway that will see a revolution in opportunities for local residents.

About the evidence we are presenting in this baseline study

In this baseline study, we have presented a number of different types of evidence. Maps and data tables make up the bulk of the evidence. It is important to understand our approach. Many of the maps presented in this report will look similar to the example to the right. The areas shaded on the maps are the buildings contained within each Lower Layer Super Output Area (LSOA). LSOAs are neighbourhoods of approximately 1,500 people. The maps can be used to compare performance of LSOAs in EBNS on a particular indicator relative to England as a whole.

Example mapping



The colours of the map show how the LSOAs rank on a particular indicator compared with other areas across England. Each LSOA in England has been ranked from highest to lowest on each of the indicators and then grouped into 10 bands (deciles) with an equal number of LSOAs in each decile.

LSOAs ranked in the worst 10% of areas in England on an indicator are ranked in decile 1 and shaded dark blue (shown in the area highlighted with the red circle on the example map on the right). Areas ranked in the best or least worst 10% of areas are ranked in decile 10 and shaded yellow (e.g. the area highlighted with the green circle on the example map on the right). The colours circled in orange in the key are the deciles between the lowest 10% and the highest 10%. Note that the colour scheme convention adopted in this report is to use the dark blue colour for indicators showing a worse outcome regardless of whether a worse outcome is denoted by a higher or lower value: for example for pupil attainment measures areas are ranked in the dark blue decile if they have a low value, whereas for unemployment figures areas are ranked in the dark blue decile if they display a high value. For more neutral indicators, e.g. population aged 0-15, the dark blue decile is assigned to areas with a higher value on this indicator. All streets and buildings in each LSOA are shaded, including non-residential properties. Where non-residential properties are shaded, the colour they are assigned relates to the levels in the surrounding residential area that falls within the same LSOA neighbourhood.

Many maps also show a coloured wash, indicating a typical walktime to a public transport connection (typically Metro, Sprint, or rail). This wash should not be confused with the LSOA data.

Many of the tables in this report will look similar to the example on the right. These tables are frequently independent of the maps. In tables, white text on a dark blue background denotes the poorest performing value (this can be the highest or lowest value, depending on the data set). The EBNS is always highlighted in red, as shown in the example table on the right.

We use the most up-to-date data available at the time of writing. Some data is from the 2011 Census and so is growing old, and this needs bearing in mind. There is no way around this problem, because in some instances only the Census gives us data at the spatial scale we need.

In some instances we have included peer-reviewed academic work, policy literature and the results of interviews with those working on the ground. Inevitably, some of the interviews include assertions and opinions: in our view, these still count as important evidence, and have been included where we think it likely that they will be useful during the vision and strategy development process. Interviews were undertaken on Chatham House rules and so interviewees will not be named. We have provided a list of written sources as an appendix.

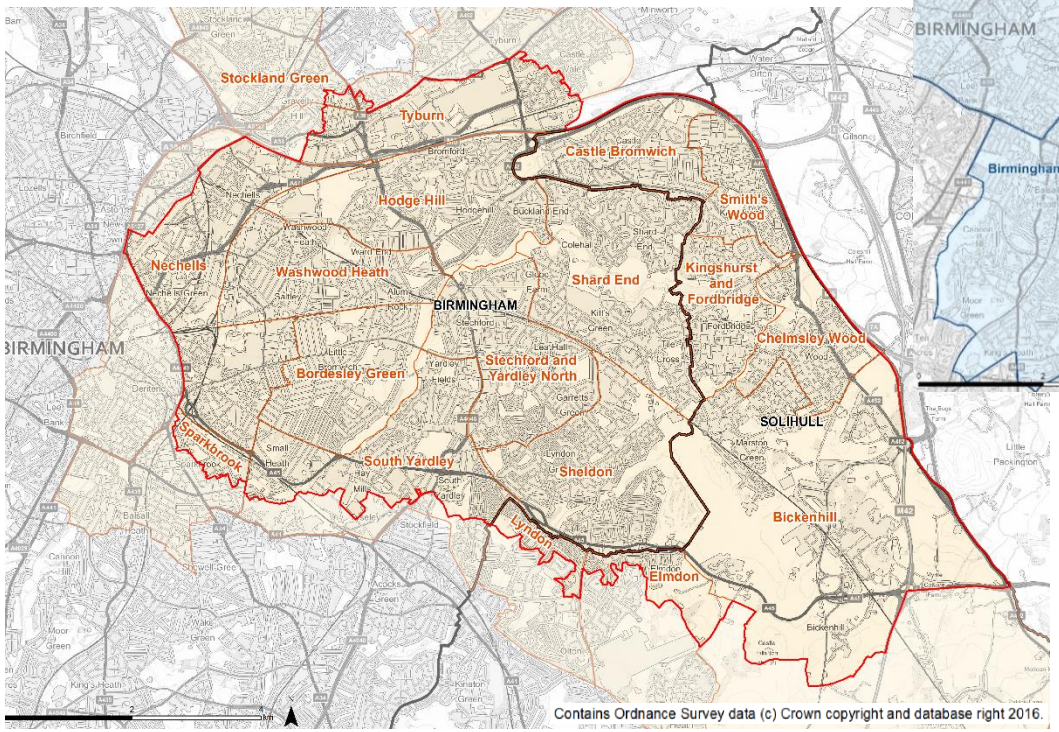
Area	Population aged 0-15 (as % of total population)
EBNS study area	**26.7%**
Birmingham	22.9%
Solihull	19.1%
WMCA constit LAs	21.3%
England	19.1%

The EBNS study area includes seven parliamentary constituencies and 19 local government wards. It extends from the UK Central HS2 site in the east to the City ring road (A4540) in the west, and from Castle Vale in the north and A45 in the south, covering 7,586 Ha and nearly 300,000 people

The EBNS study area geography has been created for this study and provided to us by the client group.

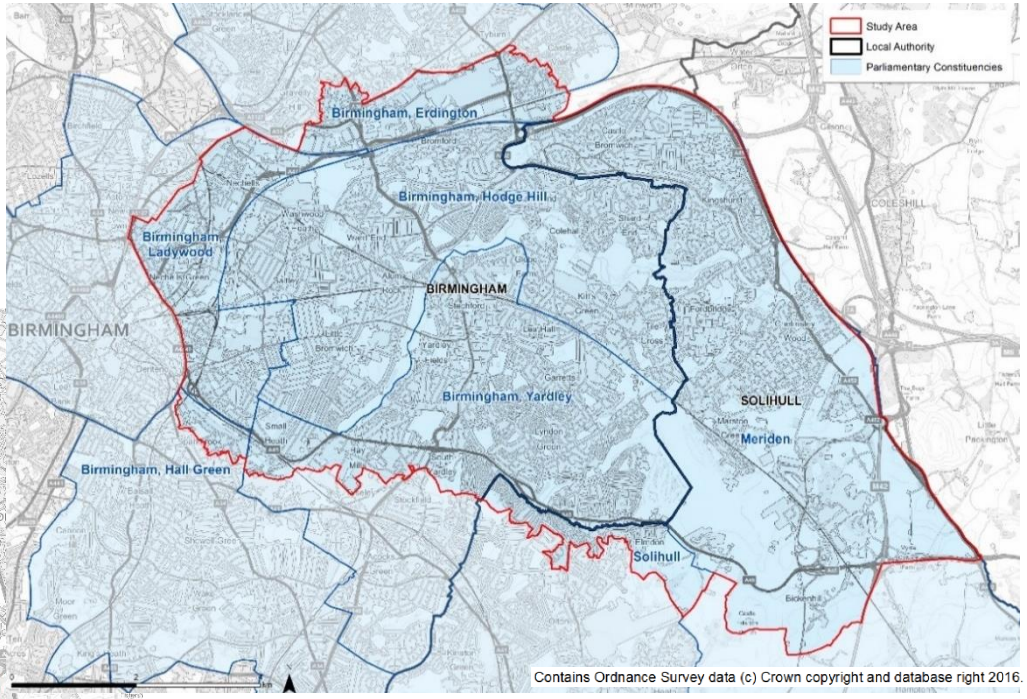
The study team recommended a modest expansion in the area in order to encompass geographical walk-time catchments around new transport proposals in the area; the SPRINT route to the south, and the potential new stations on the rail line to the north, which may be released by the Camp Hill Chords improvements. We will talk about these transport proposals in detail later in the report.

EBNS ward map and study area



Source: BCC and SMBC

EBNS parliamentary constituencies and study area



Source: BCC and SMBC

The boundary has been based around Lower Layer Super Output Areas where possible to allow for collection of data.

The administrative boundaries of Birmingham City Council and Solihull Metropolitan Borough Council meet within the study area.

The future opportunity

Key issues

- The UK's new economic geography will favour East Birmingham & North Solihull
- Jobs growth is in the pipeline
- Transport investment is in the pipeline

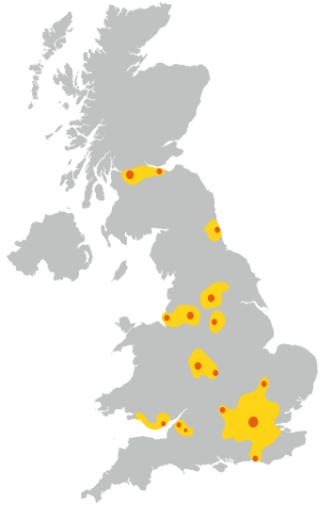
The economic geography of the UK is changing. EBNS can benefit

The UK is at a moment of change – and EBNS capitalise on this. New infrastructure will create new, more integrated economic patterns and the EBNS area can take advantage of changes beyond its borders. EBNS is ideally placed to capitalise, being on the eastern side of the West Midlands conurbation, with easy access to strategic connections.

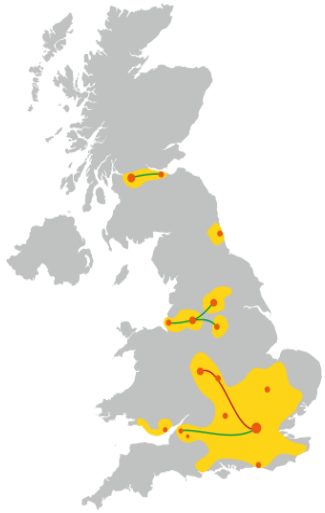
The first phase of HS2 (expected in 2026 in Solihull and Birmingham), will create new configurations of labour and product markets, as well as creating agglomeration benefits (Gibbons 2010). Birmingham's HS2 stations will provide quicker links into central London than many stations in London Zone 5 and 6. Such new connections have been shown to have a real effect on growth patterns, and can be expected to do so again (Chen & Hall 2011).

Major development is expected around Curzon Street and the HS2 Interchange Station at UK Central. Alongside this, Birmingham Airport has major expansion plans. On completion of these plans, the Airport would be of European significance, creating a major transport node for the West Midlands. At the same time, car manufacturing is undergoing a renaissance, a UK Industrial Strategy has been launched, and the Combined Authority may be able to provide additional strategic focus on EBNS.

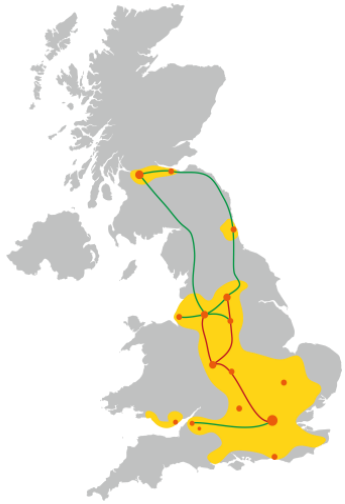
Current economic configurations (UK): growth predominantly centred around local cities



The emerging new geographies (2030): West Midlands and South-east region merge



The completion of the HS2 "Y" and beyond 2040: the West Midlands with fast links to the northern and southern economies and the creation of a 'mega-region'



Source: Alan Baxter Associates in Independent Transport Commission (2015) *Connectivity and Cities*

EBNS' future jobs market is expected to be transformed by major planned investments in and around the area

National Exhibition Centre and Birmingham City Council (BCC) have prepared a high level masterplan for the NEC site responding to known current market demand for leisure related land-uses and forecast demand based on research and the ambition of UKC for the M42 corridor. The opening of Resorts World in October 2015 represents the first step in realising the masterplan vision.

Birmingham Airport is seeking to increase capacity within the existing assets and seeking alternative options for future growth. Subject to planning approval and business case, new airport facilities at the HS2 Interchange Station could create a unique multi-modal interchange co-locating high speed rail with air, road, bus, rapid transit and other transport modes. Uniquely, this option builds on top of HS2 and would create the potential to enhance the scale of office, industrial retail/leisure and hotel uses within the Hub. This could also include the provision of a combined Airport/HS2 Terminal to fully maximise the connectivity between air and rail and the economic benefits this would bring.

Jaguar Land Rover (JLR) at Lode Lane Solihull and Castle Bromwich Birmingham. JLR's ambitions for Lode Lane (Solihull) are to significantly enhance manufacturing capability, including the construction of a new Logistics Operation Centre. The phased longer term proposals set out would be subject to future business cases and planning approval. At the Castle Bromwich site (Birmingham), plans were announced in September 2016 to transfer production of the Jaguar XE model will transfer over from Solihull to Castle Bromwich in a move which will 'future proof' the site.

Arden Cross Consortium (the HS2 station site) is being delivered by a consortium of four landowners. At the heart of the development is the HS2 Interchange Station. Masterplanning is underway for over 266,000 sq m of commercial space suitable for national and international occupiers, 2,000 new homes and complementary retail and leisure amenities.

Washwood Heath (circa 64 ha) is mainly the sites of the former Alstom (and before that Metro-Cammell) train works to the west of Common Lane and the former LDV vans plant to the east of Common Lane. All of the land at Washwood Heath was included in the HS2 Bill (and the HS2 Safeguarding area) both for permanent rail infrastructure and the construction process. The site will become a strategic employment site. 40 ha will be retained for HS2 use in two parts. Firstly, the HS2 Rolling Stock Maintenance Depot (RSMD) will serve both phases 1 and 2 of HS2. The RSMD will be an operational and maintenance hub for HS2 incorporating activities which will include all light and heavy maintenance requirements. The RSMD will operate 24 hours a day, 365 days a year and will employ up to 500 people when at capacity, starting around 2026. Secondly, the HS2 Network Integrated Control Centre (NICC), will employ 140 people and will manage train control and communications for the entire network starting around 2026. Once the phase 1 construction period is complete, 24 ha of land will be available for development (although 4 ha may be released early). The site will be used for employment, but will need to go back through the planning system. On the 24 ha outside HS2 use, up to 3,000 jobs could be accommodated, assuming a typical employment density (40% plot ratio and B2 industrial/B8 warehousing blend), and around 3,640 jobs on the site overall, including HS2 jobs.

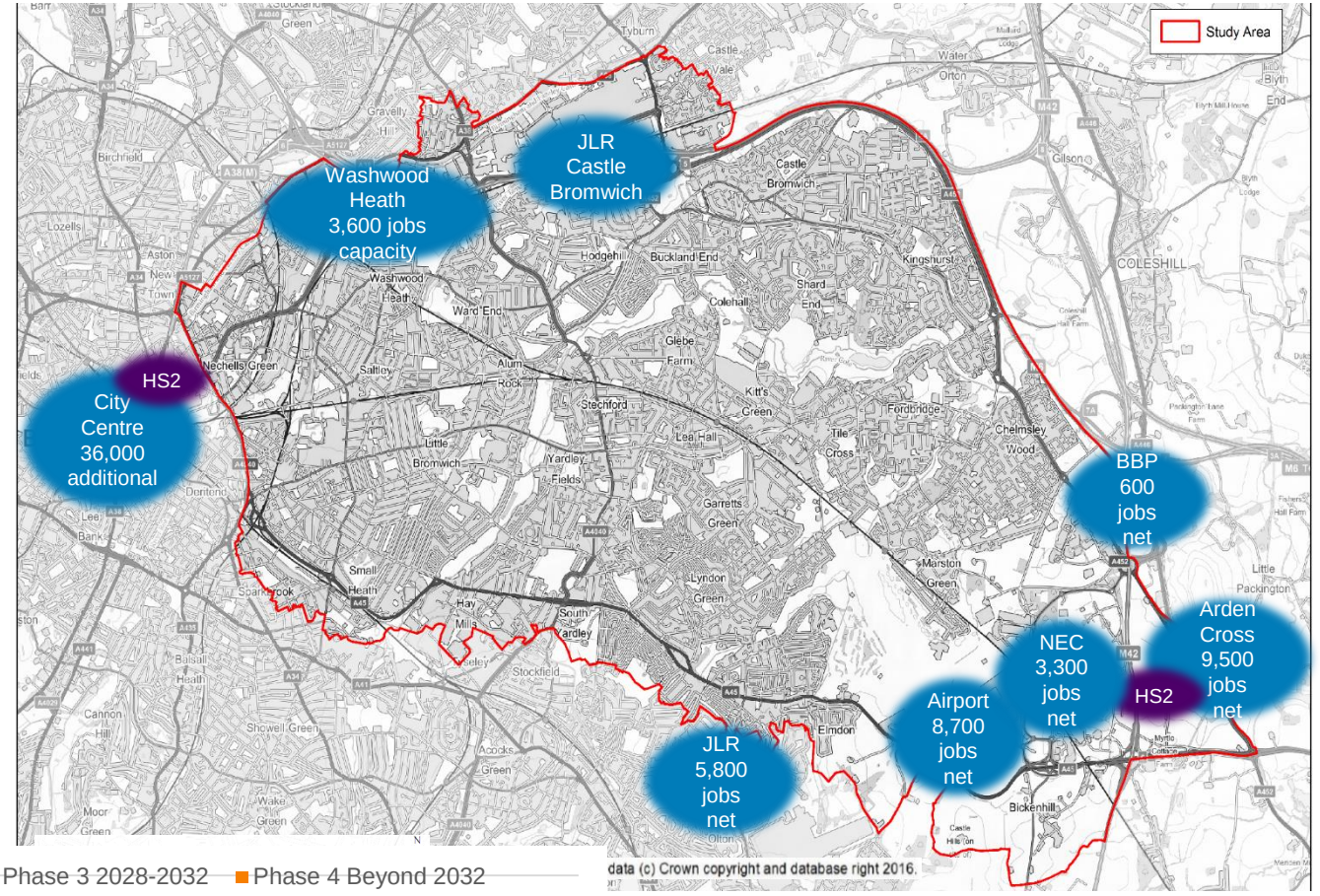
Birmingham city centre is expected to grow, with the many of these jobs can be directly linked to the new development opportunities available in and around Curzon Street (36,000 jobs) immediately to the west of the EBNS area.

Birmingham Business Park is an established employment centre in multiple ownership, with Blackrock controlling a significant element. It consists of 60 hectares of land and currently accommodates circa 177,000 sq m of office space. Planning permissions exist for a further 14,100 sq m of office development.

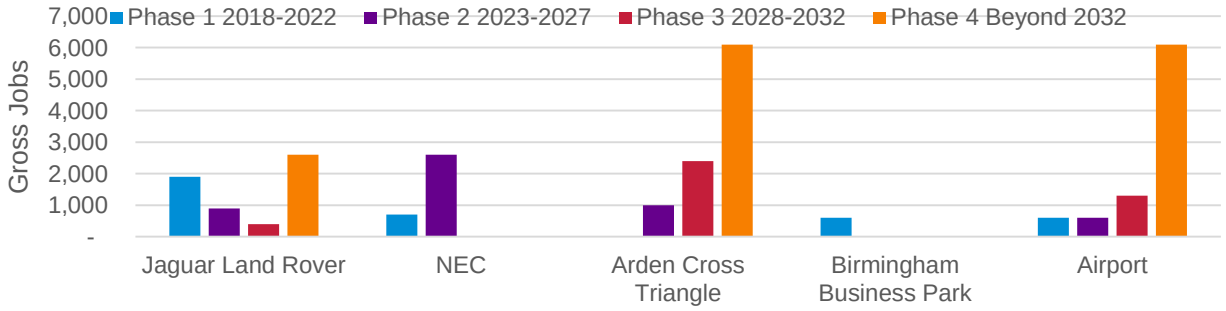
Jobs growth is located at key sites within and surrounding EBNS

We have taken the economic opportunities listed on the previous page and set them out geographically.
To the west of EBNS is Birmingham city centre, which has been growing rapidly over the last two decades, and will be further boosted by the arrival of HS2 at Curzon Street; to the north is potential expansion at JLR Castle Bromwich and on the Washwood Health site; and to the east is UK Central, which will see a new HS2 station on a green field site, major expansion at Birmingham Airport, new opportunities at the National Exhibition Centre in Birmingham, and planned expansion at JLR plants at Lode Lane.
The map shows how the key sites surround the EBNS area. The UK Central jobs numbers are Full Time Equivalent workplace based net new jobs for Solihull, allowing for displacement effects. No allowance has been made for deadweight or local multiplier effects. **Numbers quoted are draft**, and are subject to change as work develops. Detailed labour market analysis in ongoing to determine the ability of the local labour market to meet the demand profile.

EBNS study area and job opportunities (UK Central jobs shown are draft)

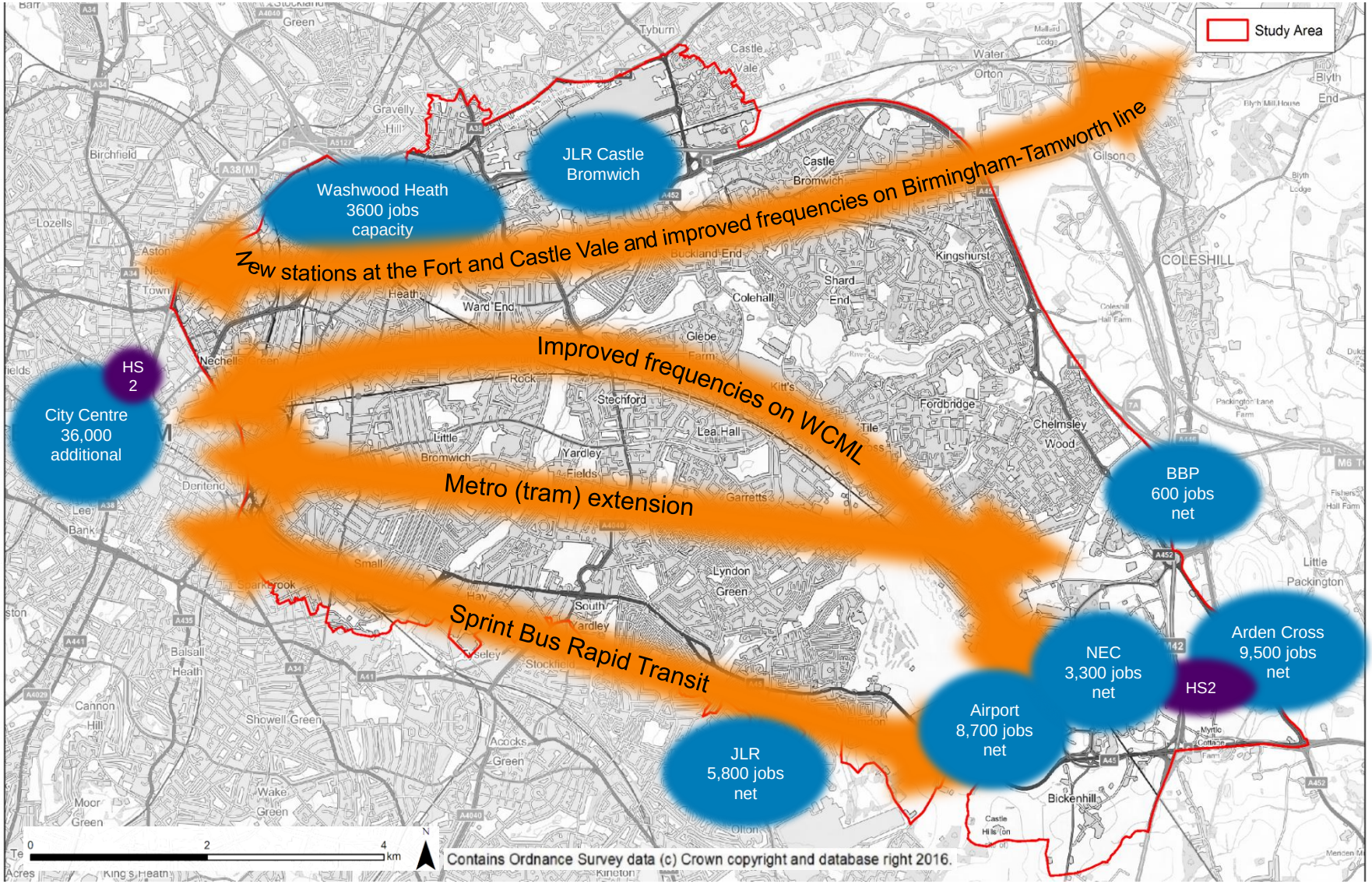


Net additional jobs, UK Central, draft projections excluding multiplier effects



Source: Amion for UK Central

Major investments in connectivity - including investment in Metro, a new bus rapid transit route, more services on ‘classic’ heavy rail lines and new stations - will create a new accessibility to job opportunities



The historic, geographical and demographic context

Key issues

- Future growth needs innovation and change
- EBNS has a growing, young, but relatively deprived population
- EBNS has diverse local communities

Why is this issue important? A brief review of the literature and local context

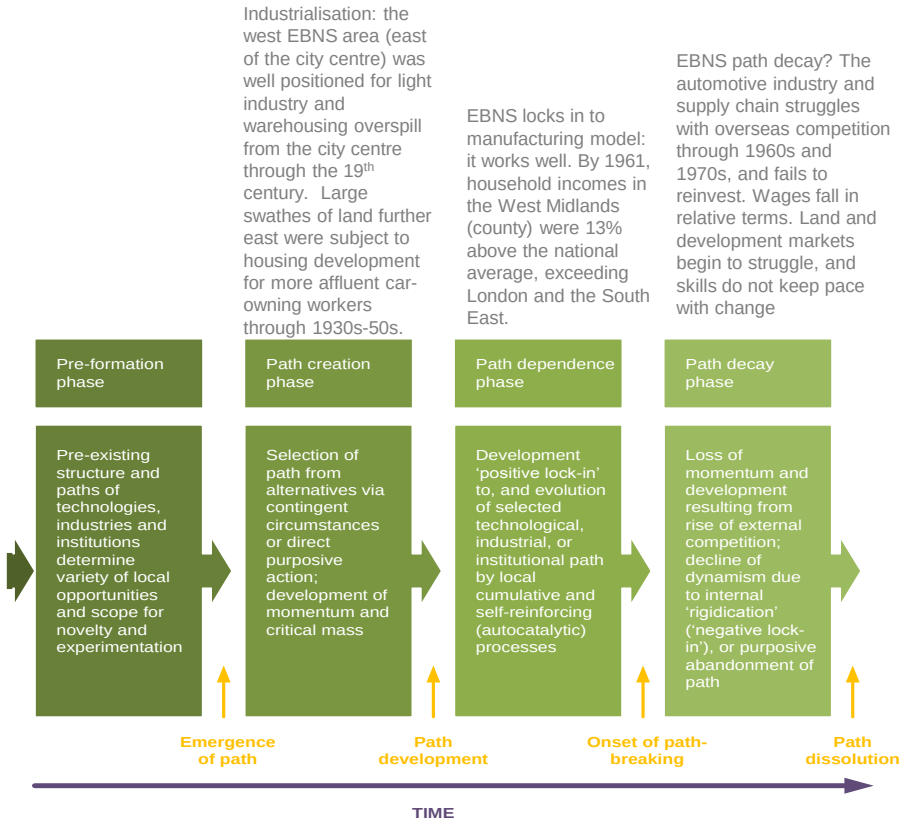
History matters to economic outcomes. Prof James Simmie uses economic history to explain the present, and provide a guide to the future. The economic future of places rests to a certain extent on its historic economic "path" (Simmie 2008). According to Simmie, places become path dependent because

- there are (originally) profits to be made – which leads to firms and consumers being locked into repetitive patterns of production and consumption, and this limits the opportunity for new products and services to make it to the market.
- technological (and capital) lock-in occurs, tying an area to existing technologies. This is accompanied by institutional inertia, which includes Governmental, organisational or cultural systems that lag behind economic change.

Simmie's work suggests that the challenge is to create a new growth path. As Simmie says, areas "must be able to escape their past to create new economic futures. Continual growth is never guaranteed. There is a continual need for constant change and innovation". Different elements of the EBNS area might be at different points of the cycle. EBNS has experienced "path decay" in the past. It must avoid "path decay" in future. A new path must be found.

Demography matters to economic outcomes. Other things being equal, rising populations tend to bring rises in economic output, but the profile of the population has an important influence on income per head. This is because economic behaviour and needs vary at different stages of life: young people require investment in health and education, prime-age adults supply labour and savings, and the elderly require health care and retirement income (Prskawetz 2007).

Geography matters to economic outcomes. Academics have made much of ideas such as the 'end of geography' and the 'death of distance': developments in the technologies of transport and communication have meant that capital and firms are no longer tied to place (Reich, 1991). We follow geographers' counter-arguments in suggesting that place remains very important: "every component in the production chain, every firm, every economic activity is, quite literally, 'grounded' in specific locations. Such grounding is both physical in the form of sunk costs and less tangible in the form of localised social relationships". (Dicken 1998). In short, places do still matter.



Source: Simmie et al (2008) *History matters: Path dependence and innovation in British city-regions*

Path dependence: a rough view of where EBNS is now

- Income, education, health statistics suggest long term weak performance: path decay?
- Manufacturing industry is possibly in two places: path dependence and path creation.
- EBNS is possibly on the brink of a new path creation phase. JLR's growth is revolutionising prospects for automotive, with step change investments in electric vehicles in prospect; airport growth could create major change in logistics industries and wider catalytic impacts; HS2 impacts in central Birmingham; growth at the NEC; and possible growth at the Arden Cross site (the location of the HS2 station). A truly international transport hub is being created, with co-located strengths in advanced engineering.
- The challenge at EBNS is getting the path creation phase to work as rapidly as possible, and ensure that this change brings maximum benefit to the residents of the EBNS area

The majority of the urban form in EBNS was the result of expansion between WWI and WWII, housing a well paid manufacturing workforce. Post war expansion was focused in North Solihull. Some areas have changed little since then

East Birmingham

The economy and personality of Birmingham are very different from other industrial or mercantile cities, such as Liverpool or Bristol.

Birmingham was once one of the most innovative cities in the world. The city focused on small-scale specialised companies with highly-skilled and well-paid workforces and had an entrepreneurial municipal leadership inherited from Victorian times.

Until 1920, Birmingham was fairly compact; however, between the wars Birmingham built 50,000 council houses and allowed 65,000 private homes to be built. Cottrills Lane in Alum Rock was the first scheme to be completed after WWI.

North Solihull

The urban character of North Solihull is defined by the housing areas and landscape features. The majority of Chelmsley Wood, Smith's Wood and Fordbridge were built during the 1960s to a Radburn layout with backs of properties and high fences fronting onto the road and housing blocks geometrically arranged around parking courtyards, drying spaces or small green areas. The area contains a large number of high rise blocks. Densities are generally within the range of 35 – 45 units per hectare.

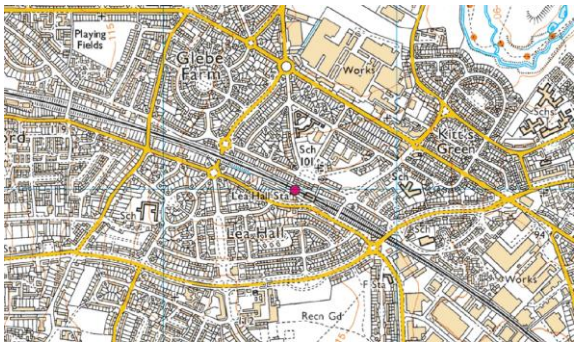
Kingshurst has a contrasting character including pre-1950s development of semi-detached and detached units, early 1950s housing, later housing comprising a mix of flats, terraces and maisonettes arranged around cul-de-sacs and courts and 1970s – 80s development fronting Babb's Mill Park.

Chelmsley Wood Town Centre has dual carriageways on three sides and major roundabouts at key gateways, which act as barriers between the shopping centre, the residential neighbourhoods and the green spaces of the River Cole Valley.

The expansion of EBNS since 1938 at Kitts Green

Date: 1938
Source: National Library of Scotland

Date: 1952
Source: National Library of Scotland



Date: 2017
Source: Ordnance Survey

The EBNS population lives at higher densities towards the west of the study area. Population trends from 2001 show a pattern of rapid growth

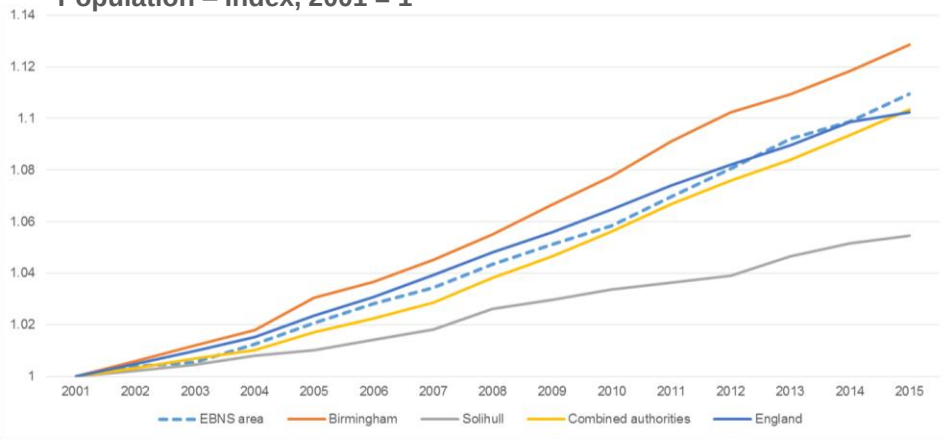
The EBNS area's population has risen by almost 11% since 2001 - a faster rate than all comparator areas with the exception of Birmingham. During this time the population has gone from approximately 269,151 to 298,600, an increase of almost 30,000 people. Between 2010 and 2015 the area has seen population growing at 4.8%, a faster rate than all comparators including Birmingham.

Population over time	2001	2015	% growth 2001-15	% growth 2010-15
EBNS area	269,151	298,600	10.9%	4.8%
Birmingham	984,640	1,111,307	12.9%	4.7%
Solihull	199,578	210,445	5.4%	2.0%
WMCA constit LAs	2,568,003	2,833,557	10.3%	4.5%
England	49,440,225	54,501,221	10.2%	3.5%

The average population density across EBNS is 39 persons per hectare. Compared to all LSOAs in England, the population density in some parts of EBNS (including Washwood Heath & Bordesley Green) is in the highest 10%. This is not surprising due to the urban nature of the area. However, EBNS is not as densely populated as other English comparators.

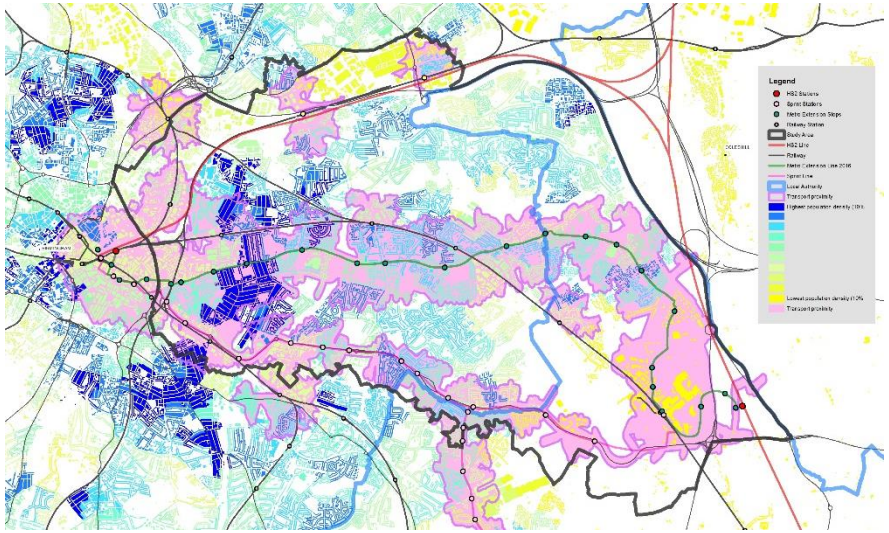
Area	Population density (persons per hectare)
EBNS study area	39.02
London: Tower Hamlets	138.03
Leeds Harehills	52.65
Liverpool: Everton	52.59
Manchester: East	40.86

Population – Index, 2001 = 1



Dataset: *Mid Year Estimates (MYE) of population* **Date:** *2001-2015* **Source:** *Office for National Statistics (ONS)*

Population density: ranked by LSOA

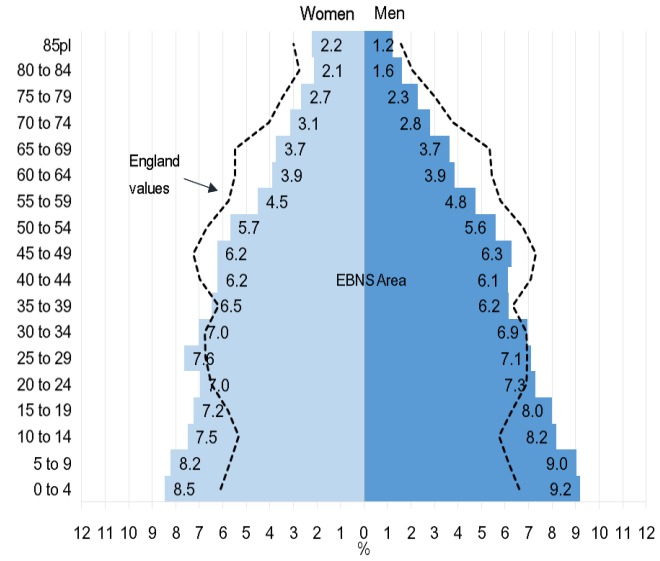


Dataset: *Mid Year Estimates (MYE) of population,* **Date:** *2014,* **Source:** *Office for National Statistics (ONS)*

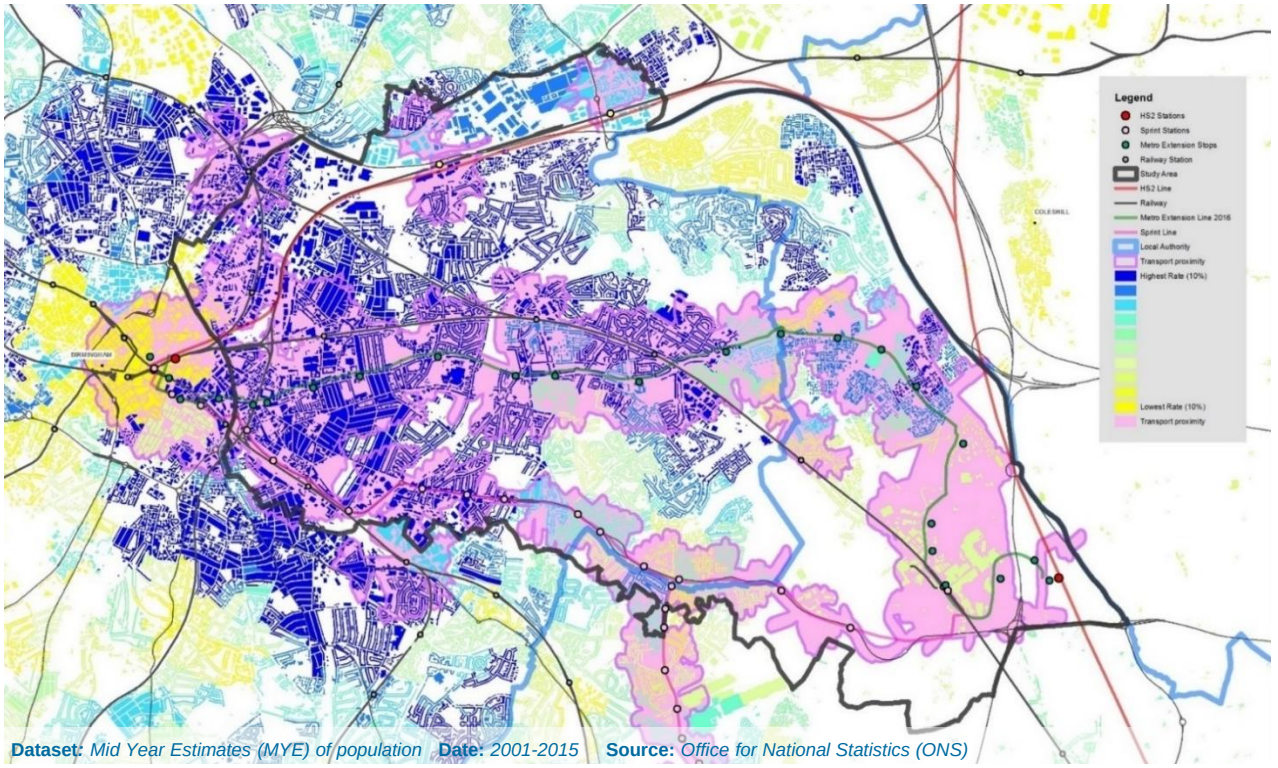
EBNS has a younger than average population, with more than one in four people in EBNS aged 15 or under. The western area has the highest proportion of young people, and parts of Castle Bromwich and Sheldon the lowest

The EBNS area has a young population compared to the England average. This is shown in the chart's wider base, with a higher proportion of people in each of the five year age/gender bands up to the age of 35 than the national average. By contrast, the narrower top of the chart indicates the study area has significantly lower proportion of people aged 55 and over than the national average.

EBNS population age profile (% in each age category)



Proportion of 0 to 15 year olds: ranked by LSOA



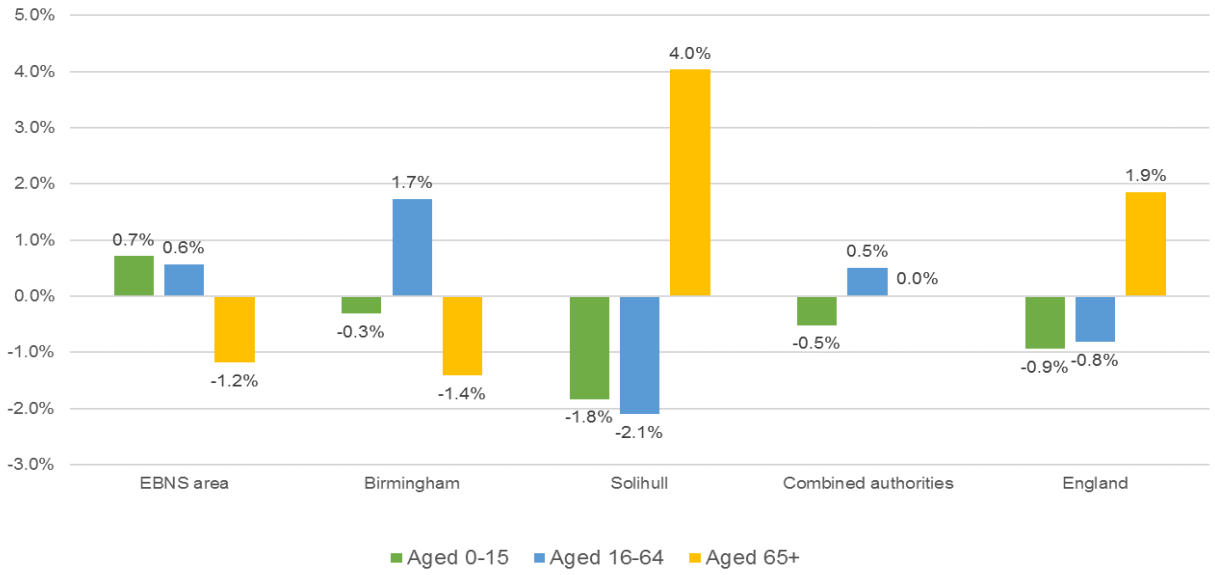
The younger population is not evenly distributed across EBNS. The western area of EBNS, near to the city centre, and around Stechford, has the highest proportion of 0–15 year olds, whereas Castle Bromwich is in the lowest decile of 0-15 year olds.

This is shown through the map above, which represents relative proportion of residents in the 0-15 year age category across the study area. The shading is coloured into deciles with blue showing the highest 10% and yellow the lowest 10%.

Area	Population aged 0-15 (as % of total population)
EBNS study area	**26.7%**
Birmingham	22.9%
Solihull	19.1%
WMCA constit LAs	21.3%
England	19.1%

This young population has been increasing over time. Between 2001 and 2015 there was an increase in people aged under 15, whereas Birmingham and Solihull on the whole has seen a decrease

Percentage change in population for selected age bands, 2001-2015



The EBNS area has experienced an increase in the proportion of 0-15 year olds between 2001 and 2015, from 26.1% to 26.8%.

There has also been a decline in the proportion of people of pensionable age between 2001 and 2015.

This trend contrasts sharply with the national average which has seen the proportion of people aged 0-15 fall, while the proportion aged 65 grow over the same period.

Change in the 16 to 64 age group has been positive. This is consistent with the pattern in Birmingham and across the combined authorities, but contrasts with Solihull and England as a whole.

% of people within each age band for 2001 and 2015

	2001						2015					
	Age 0-15		Aged 16-64		Aged 65+		Age 0-15		Aged 16-64		Aged 65+	
EBNS Area	**26.1%**	**70,219**	**59.9%**	**161,297**	**14.0%**	**37,637**	**26.8%**	**79,949**	**60.5%**	**180,520**	**12.8%**	**38,131**
Birmingham	23.2%	228,534	62.4%	614,169	14.4%	141,926	22.9%	254,085	64.1%	712,208	13.0%	144,985
Solihull	20.9%	41,774	62.2%	124,138	16.9%	33,667	19.1%	40,153	60.1%	126,404	20.9%	43,889
WMCA constit LAs	21.8%	560,337	62.6%	1,607,425	15.6%	400,237	21.3%	603,096	63.1%	1,788,630	15.6%	441,798
England	20.0%	9,907,391	64.1%	31,698,752	15.8%	7,834,148	19.1%	10,399,494	63.3%	34,488,260	17.7%	9,662,523

Dataset: *Mid Year Estimates (MYE) of population* **Date:** *2001-2015* **Source:** *Office for National Statistics (ONS)*

EBNS has seen a 4.6% growth in working age population from 2010 to 2015

From 2001 to 2015, there has been **continued population growth in EBNS,** and an 11.9% increase in working age population from 2001. In the five years between 2010 and 2015 population growth was higher in East Birmingham (and Birmingham) than all the other comparator areas.

Working age Population over time	2001	2015	Total % growth 2001-15	% growth between 2010-15
EBNS area	**161,297**	**180,520**	**11.9%**	**4.6%**
Birmingham	614,169	712,208	16.0%	4.6%
Solihull	124,138	126,404	1.8%	-1.3%
WMCA constit LAs	1,607,425	1,788,630	11.3%	3.7%
England	31,698,752	34,488,260	8.8%	1.1%

Dataset: Source: *Business Register and Employment Survey (BRES)*

Most of the EBNS area is in the top 20% most deprived areas in England

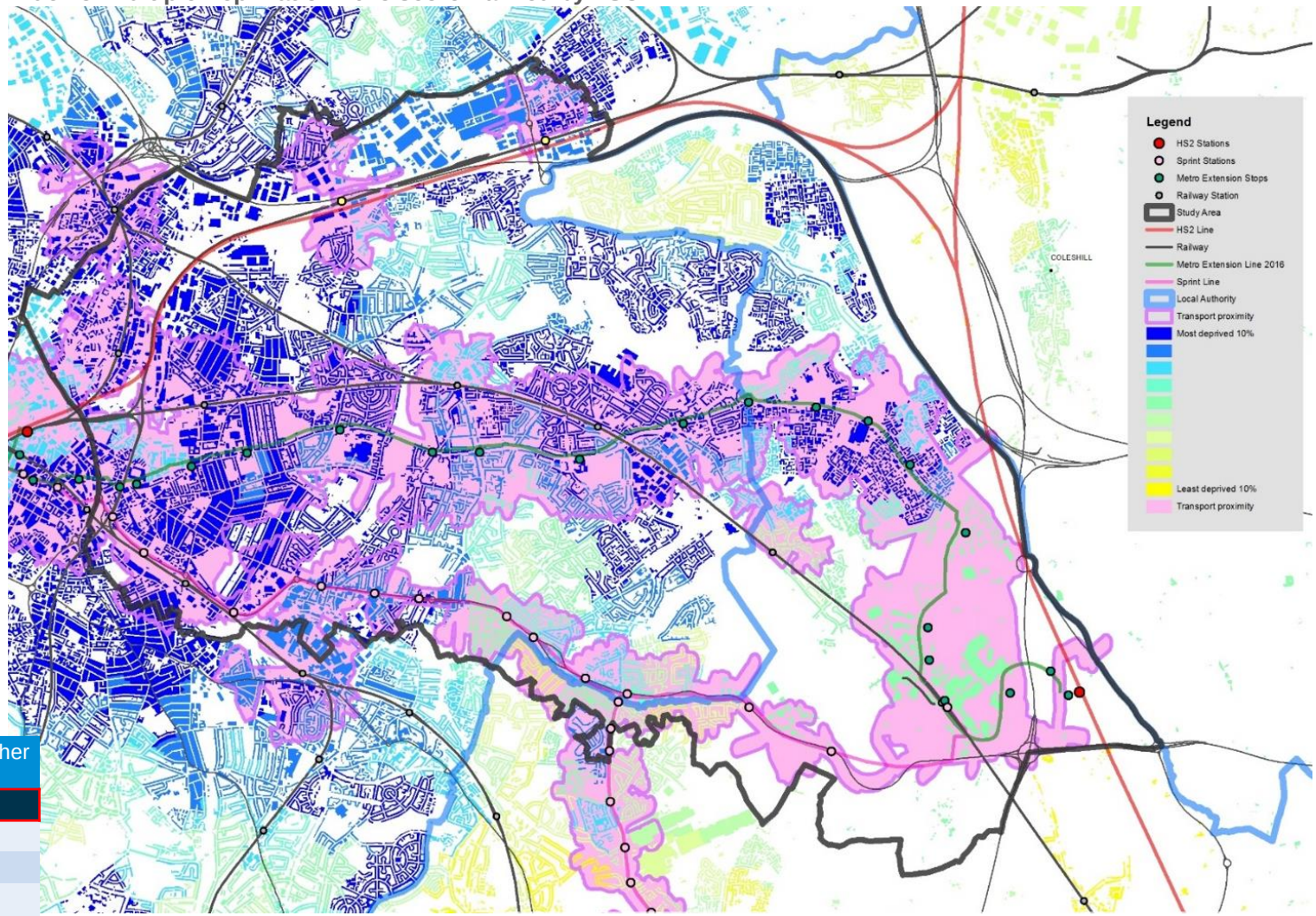
The map to the right shows the Index of Multiple Deprivation (IMD) 2015. The IMD is a relative measure of deprivation for small areas. The overall IMD combines together indicators under seven different domains of deprivation: Income; Employment; Education; Health; Crime; Barriers to Housing and Services and Living Environment. A high score indicates that an area is experiencing high levels of deprivation.

In the map, the areas shaded dark blue are among the 10% most deprived in England on the IMD 2015, while areas shaded yellow are among the 10% least deprived.

There is widespread deprivation across the EBNS area, except for parts of Castle Bromwich, Sheldon and Hodge Hill. The most deprived areas are located towards the west, with a central band of deprivation running through the area, along the proposed metro route and the area surrounding (but not including) Castle Bromwich.

Area	IMD 2015 Deprivation score (higher = more deprived)
EBNS area	**44.78**
Birmingham	37.72
Solihull	17.76
WMCA constit LAs	31.6
England	21.69

Index of Multiple Deprivation 2015 score: ranked by LSOA



Dataset: *The Index of Multiple Deprivation (IMD)* **Date:** *2015* **Source:** *Communities and Local Government*

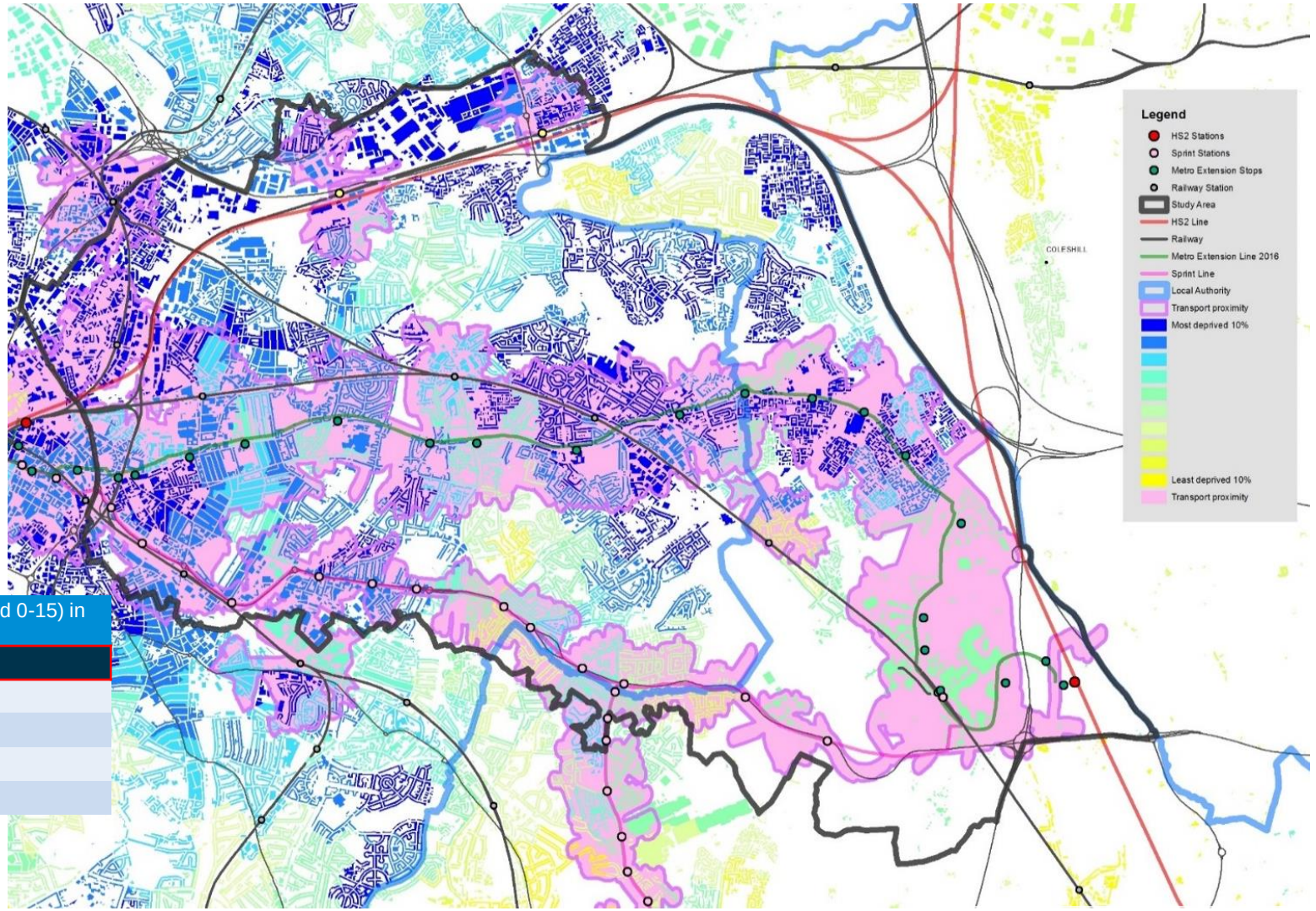
More than one in three children in the EBNS area are living in poverty

The children in poverty measure shows proportion of children (aged 0-15) in families in receipt of out of work benefits, or in receipt of tax credits where their reported income is less than 60% of the median income. Out of work means-tested benefits include: Income-Based Jobseekers Allowance, incapacity benefits and Income Support.

The Birmingham Child Poverty Commission is supervising a response to these issues.

Area	% of children (aged 0-15) in poverty
EBNS area	36.1%
Birmingham	32.9%
Solihull	16.9%
WMCA constit LAs	29.2%
England	20.1%

Children in poverty: ranked by LSOA



Date: *2014*, **Source:** *Office for National Statistics (ONS)*

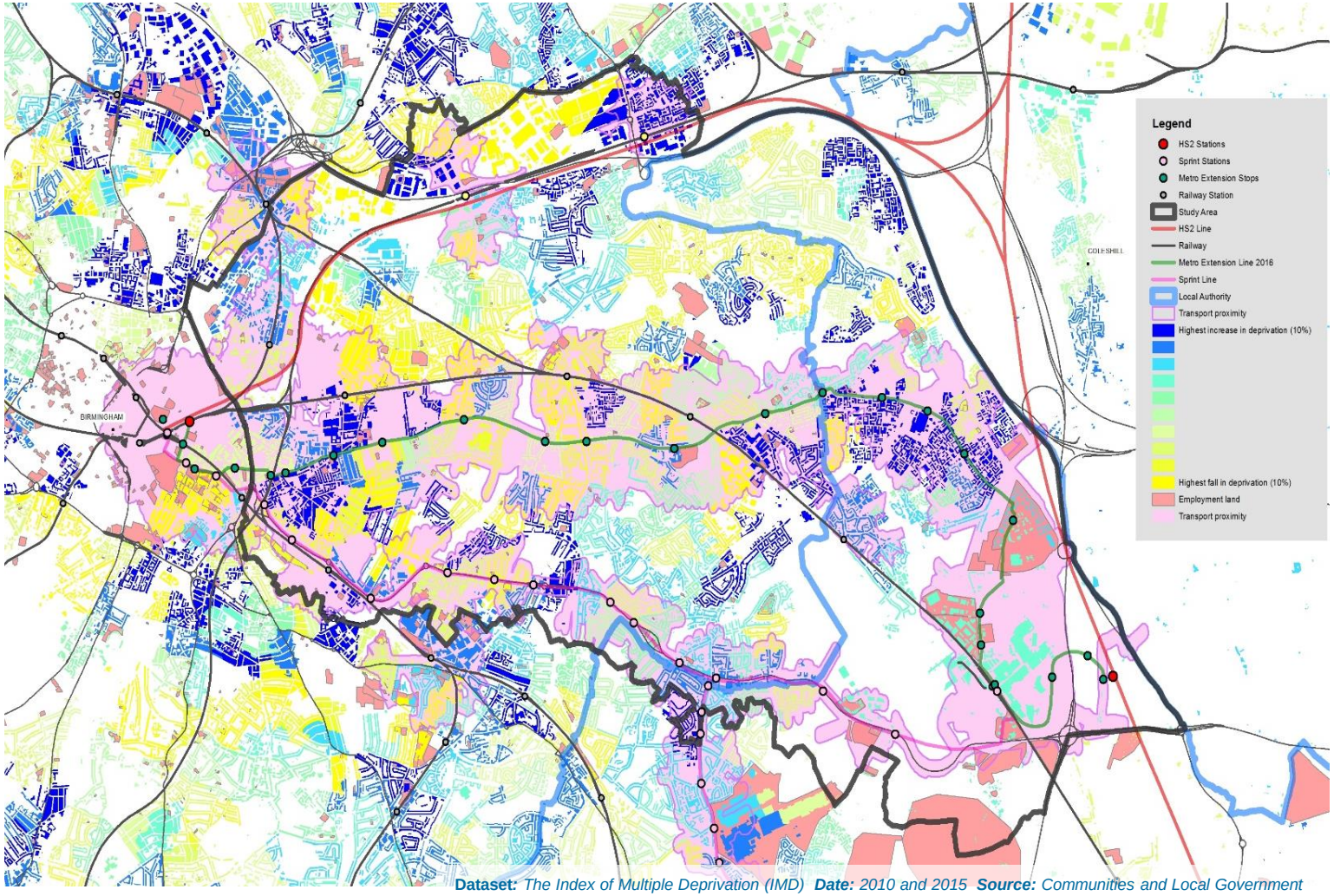
Relative deprivation has been increasing in areas along the planned Metro line extension, particularly towards inner Birmingham and within Solihull

The Index of Multiple Deprivation measures all LSOAs in England on an index of measures. We can look at changes in an area's rank to understand how each area has performed relating to others. Because change is relative to other areas, the data does not necessary indicate that there has been an *absolute* change in deprivation.

The map on the right depicts the change in the rank of deprivation in LSOAs in the EBNS area between IMD 2010 and IMD 2015. Areas shaded yellow show little or almost no change (changing rank less than 1000 places). Areas shaded blue became relatively more deprived and those shaded yellow became relatively less deprived.

There have been some slight changes in deprivation across the area, with scattered areas moving up and down in ranking from 2010 and becoming less and more deprived, with a concentration of increased deprivation in the East of the EBNS area and some dramatic changes in rank (positive and negative) in the west of the area.

Increase in Index of Multiple Deprivation 2010 to 2015: ranked by LSOA

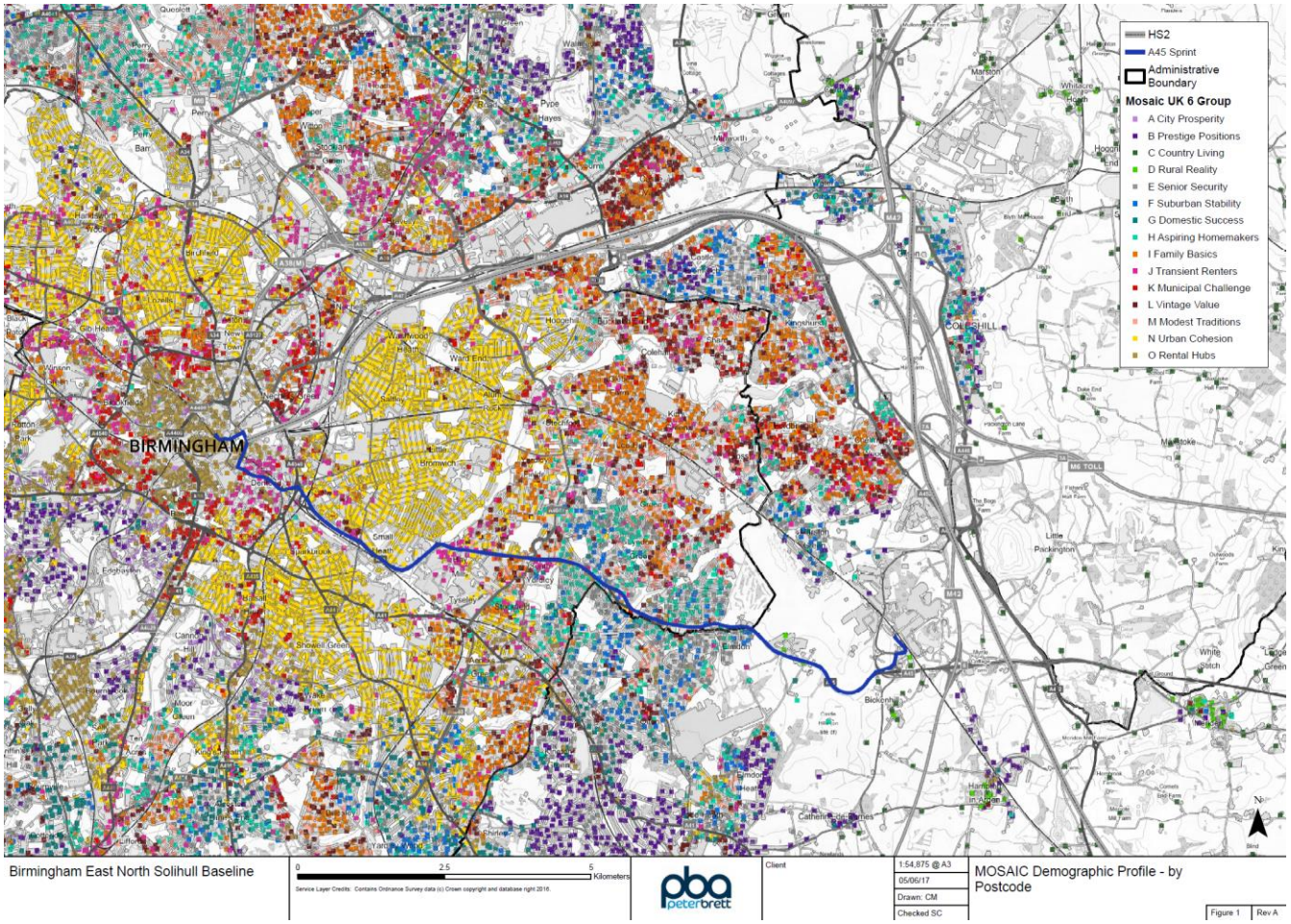


Dataset: *The Index of Multiple Deprivation (IMD)* **Date:** *2010 and 2015* **Source:** *Communities and Local Government*

We have used Mosaic social profiling to better understanding the EBNS area

We have used Mosaic, a social profiling model by Experian, to provide an understanding of the social profile of the EBNS area.
Mosaic works by segmenting the population into 15 groups which describe an individual's consumer behaviour.
The diagram shows the west as dominated by the 'Urban cohesion' socio-economic group (yellow). This groups is often multicultural and tends to have a high sense of community. The group is frequently found in city suburbs, and characterised by settled extended families and 3-bed home ownership.
'Family basics' (orange) and 'Aspiring homemakers' (turquoise) populate the centre and south of the study area. These groups are often young families with children, with few resources and often in low cost rented accommodation (Family basics) or younger families in full time employment (Aspiring home makers), often on starter salaries and working in mid-level professions positions. Those in 'Prestige positions' (dark purple) are dominant in the north of the study area (Castle Bromwich), as well as some eastern areas.
'Modest traditions' (pink) and 'Municipal challenge' (red) are also prevalent throughout the study area. Those of 'Modest traditions' are often homeowners, of a mature age, in affordable housing, on modest incomes with grownup children. Those in 'Municipal challenge' are often social renters, in low cost housing and challenged neighbourhoods with few employment options and low incomes. This group is commonly found to the east (Chelmsley Wood & Fordbridge) and north (Buckland & Shard End) of the study area.

EBNS Mosaic social profiling



Dataset*: Mosaic* **Date:** *2017* **Source:** *Experian*

EBNS is predominantly urban in nature, with the River Cole, River Tame and River Rea running through the area. Towards the west, the area has a small amount of greenbelt and is the gateway to rural Solihull

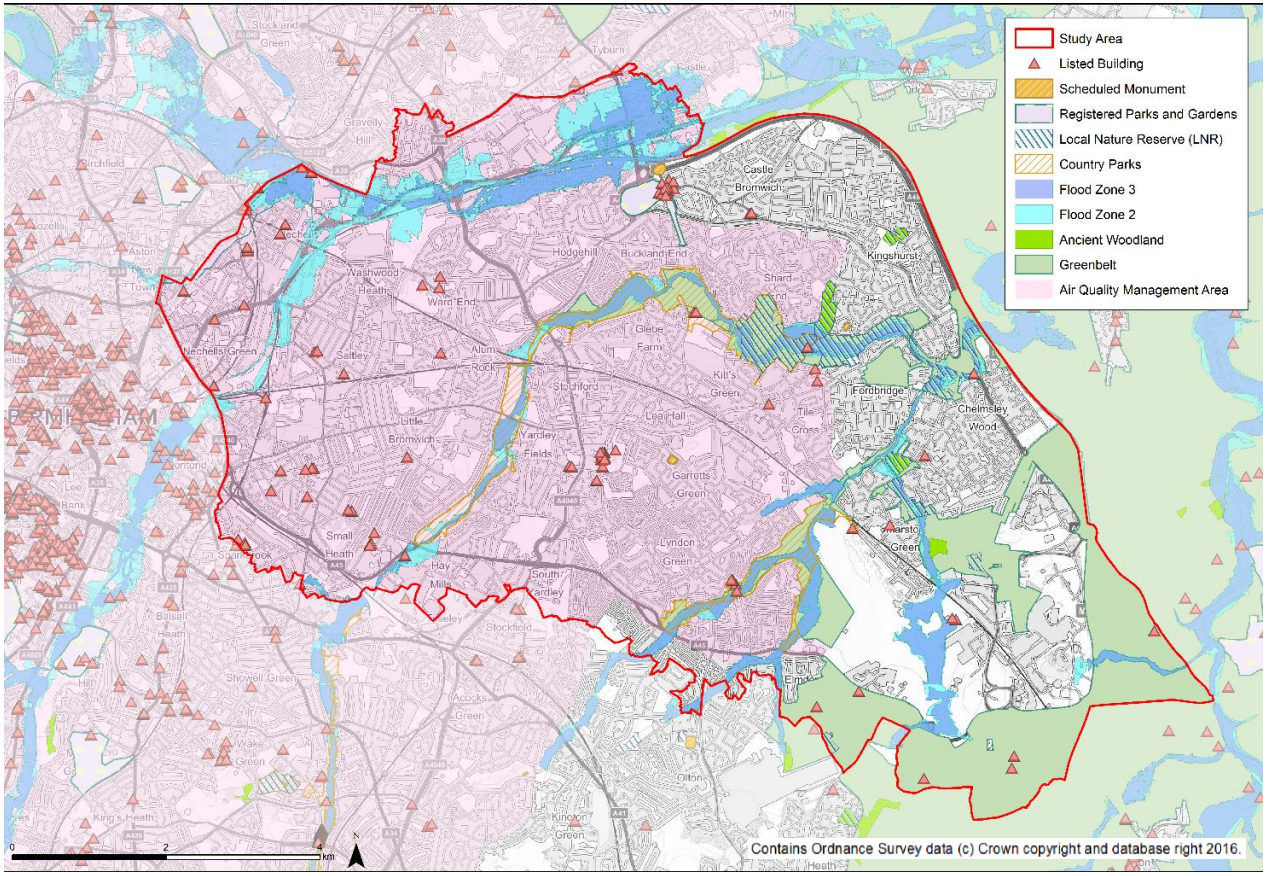
The River Cole Valley, including Kingshurst Brook, Low Brook, Hatchford Brook and Westley Brook, forms a dominant landscape feature throughout EBNS. There is a green buffer along the valley containing grassland, pockets of ancient woodland, country parks and nature reserves.

Two other rivers flow through EBNS – The River Rea and River Tame. Flood mapping shows that the land surrounding the rivers Rea, Tame, Cole and the Brooks could be affected by flooding in the absence of flood defences. The plan to the right shows that some of the adjacent land is affected by flood zone 2 (with up to 0.1 percent / 1 in 1000 chance of a flood occurring each year) and flood zone 3 (a 1 per cent / 1 in 100 or greater chance of happening each year).

The whole Birmingham City Council area is covered by an Air Quality Management Area, whereas this is not in place within the Solihull section of EBNS. The Government has recently consulted on Clean Air Zones, where targeted action is taken to improve air quality. Birmingham Council is in the process of considering how a Clean Air Zone in Birmingham would work.

A green belt on the eastern parts of the study area separates residential areas from the more rural areas of Solihull. Parts of the green belt may be released to accommodate the forthcoming HS2 station, which is to be located on the triangle of land to the east of the NEC.

Map of environmental constraints



Dataset: *Environmental Constraints* **Date:** *2017* **Source:** *PBA*

Jobs in EBNS

Key issues

- EBNS is a strategically important industrial area
- Employment is concentrated in traditionally low paying sectors

The EBNS area sits between two of the most significant employment areas in the West Midlands, and is clearly a strategically important industrial area for the city and wider area in itself

To the west of EBNS, there is Birmingham city centre. To the east there is UK Central, including the Airport, NEC, Birmingham Business Park, JLR and the Arden Cross site (the future location of the HS2 station). Continued growth and major improvements in connectivity have the potential for considerable employment growth.

The city centre is still in the process of regeneration and is seven years through the transformational 20 year 'Big City Plan'. The city centre benefits from a strong pipeline of new commercial and residential space and renewed interest from businesses and households. The recently approved Birmingham Development Plan makes positive provision for this regeneration to extend beyond the existing city centre. Large areas of former industrial land to the east of the city centre are now allocated for mixed use redevelopment through the plan or through the Bordesley Park Area Action Plans (AAPs).

The investment in HS2 at both UK Central (to the east of EBNS) and Curzon Street (in the city centre) will lead to a step change in market attractiveness and connectivity for the strategic employment areas. In Curzon Street, new jobs are anticipated to be spread across office, professional services, back of office, digital/ creative, and retail. This is based on the broad areas in the masterplan, and further work is being undertaken to identify the employment requirements.

The market attractiveness in EBNS could be supported through the proposed Metro and SPRINT routes which will provide direct connections between HS2 and the major new employment areas. It is on this basis that the employment land baseline in this section starts on an area wide basis, then focuses in on the existing situation along these routes.

Across Birmingham and Solihull, office-based sectors employ more people than industrial sectors (around 62% of jobs are in office settings). However, industrial uses take nearly three times more land.

The number of people currently employed across Birmingham City Council and Solihull Metropolitan Borough Council within the employment land use classes (B1, B2 or B8) is estimated at around 250,000. To produce these estimates we have started from official statistics (from ONS / BRES) that show employment by sector. We then translated sectors into land uses, using a method commonly used in Employment Land Reviews.

Of these people most are employed in offices (B1); 155,000 people work in jobs we expect to be accommodated in office space. 80% of these are in Birmingham and 20% in Solihull. The balance, some 95,000 people, work in either warehouses or factories, mostly (80%) in Birmingham.

Area	Estimated no. people working in office floorspace	Estimated no. people working in factory-type floorspace	Total (estimated no. people)
Birmingham	125,000	75,000	200,000
Solihull	30,000	20,000	50,000
Total	155,000	95,000	250,000

Warehouse and industrial space is land hungry. Even though there are more people working in office jobs, in terms of land and floor space, warehouse or industrial space takes disproportionality more space than offices. This is because warehouse and industrial firms employ fewer people per square metre of floorspace than offices. Across Birmingham and Solihull, we estimate there is around 2.5 million square metres of office space but 7 million square metres of industrial space (source: VOA 2012)

EBNS has a large number of office based jobs (21,000). But when we look at EBNS' share of the total number of jobs in Birmingham and Solihull, we see that the area is better understood as a strategically important location of industrial and warehousing jobs – but that relatively few of these *existing* industrial and warehousing jobs are located near Metro and Sprint corridors

The table shows the share of total warehousing, industrial and office jobs accommodated in EBNS – and shows that EBNS is a strategically important industrial area. We estimate that around a quarter of all industrial and warehousing employment in the two Council areas is found within our study area. Of the 55,000 industrial jobs in Birmingham and Solihull 15,000 are within EBNS. 10,000 of the approximate 40,000 warehousing jobs are within our study area.

But while industrial employment (and hence industrial floorspace) is very significant in the study area, the table also shows that the main *current* reservoirs of employment and warehousing land are located slightly away from the two routes, and so may be less affected by the labour market improvements generated by transport investment: the share of industrial jobs within walking distance of the Metro and Sprint lines are relatively modest, and suggests that neither the Metro nor Sprint routes will service large reservoirs of *today's* office stock or office jobs *within the EBNS boundary*. The BRES data we have used shows that there are only around 2,500 industrial jobs and a further 2,500 warehouse jobs along the Metro corridors. For the Sprint route we estimate there are only 2,500 industrial and 2,500 warehouse jobs within an easy walktime along the route.

The reason why so few jobs are located within an easy walk of the routes is because the main industrial area within EBNS is along the A47 corridor – which is located away from the Metro or Sprint route.

However, the two routes still link the smaller, local industrial sites providing employment opportunities in close proximity to where people live. The proposed metro route links the older industrial areas at Bordesley Green along with the newer, purpose built estate at Garretts Green. The Kitts Green estates are just on the edge of Metro Route area. The sprint route links the estates around Tysley in the west with the more dispersed industrial and warehousing space stretching along Coventry Road. Without these industrial areas local residents would need to travel further for work.

	Birmingham & Solihull	EBNS	Metro isochrones	SPRINT isochrones
Industrial based jobs	55,000	15,000	2,500	2,500
Industrial jobs % of Birmingham and Solihull total		27%	5%	5%
Warehousing based jobs	40,000	10,000	2,500	2,500
Warehousing jobs % of Birmingham and Solihull total		25%	6%	6%
Office based jobs	185,000	21,000	8,500	3,000
Office based jobs % of Birmingham and Solihull total		11%	5%	2%

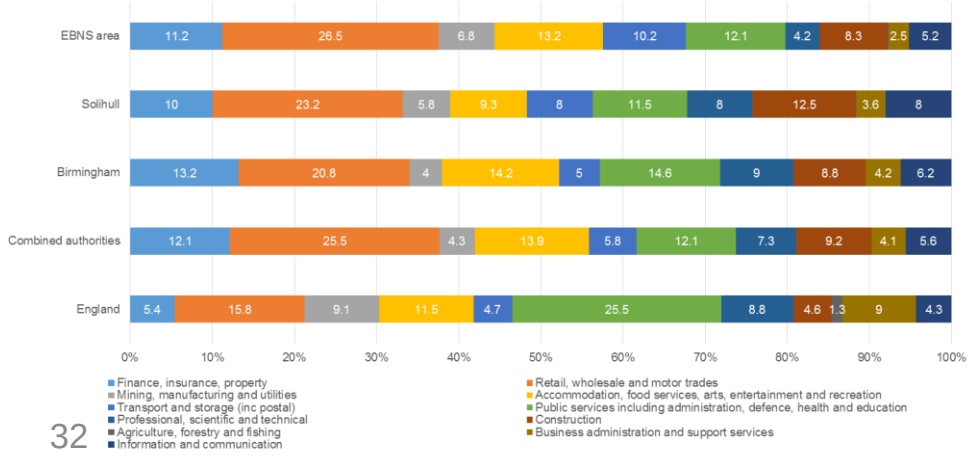
Of the jobs based within EBNS, the highest proportion are associated with motor trades, closely followed by hospitality and transport/storage

Here we look at employment by industry of those who work in EBNS, irrespective of whether they are residents or otherwise. EBNS has a relatively high proportion of jobs in retail/motor trades (27%) (driven by Jaguar Land Rover) and transport and storage 10.2% (Birmingham Airport) relative to England as a whole (with 16% and 4.7% respectively). By contrast, there are less than half as many jobs locally in public service or business administration industries (which typically require high level qualifications) than the national average.

The sectors where the EBNS area has the biggest gap in relation to comparator areas are public administration, business administration and professional, scientific and technical roles. In the latter sector the difference is particularly stark, with the EBNS area having less than half the national proportion of jobs in professional occupations, at 4.2% to England's 8.8%.

This is shown in the table to the right, where jobs in the EBNS area and comparators are broken down by broad industry group. Instead of combined groups, all categories are provided, allowing for a more in-depth look at the unique features of employment in the EBNS area. It is also shown graphically below.

Proportion of jobs per industry group



Proportion of jobs per industry group

	EBNS area (%)	Birmingham (%)	Solihull (%)	Combined Authority (%)	England (%)
Accommodation and food services (hospitality)	**11.8**	13.6	8	12.6	7
Transport and storage (inc postal)	**10.2**	5	8	5.8	4.7
Retail	**8**	8.2	9.8	9	9.9
Wholesale	**6**	4.6	2.7	5.2	4.1
Arts, entertainment, recreation and other services	**1.4**	0.6	1.3	1.3	4.5
Health	**1.8**	4.6	3.1	3.4	12.5
Education	**7.7**	5	5.3	4.7	9
Jobs in professional, scientific and technical	**4.2**	9	8	7.3	8.8
Jobs in motor trades	**12.5**	8	10.7	11.3	1.8
Jobs in financial and insurance	**9.7**	11.4	8	10.4	3.5
Jobs in construction	**8.3**	8.8	12.5	9.2	4.6
Jobs in manufacturing	**2.5**	1.6	1.3	2	8
Jobs in mining, quarrying and utilities	**4.3**	2.4	4.5	2.3	1.1
Jobs in agriculture, forestry and fishing	**0.1**	0	0.1	0	1.3
Jobs in property	**1.5**	1.8	2	1.7	1.9
Jobs in business administration and support services	**2.5**	4.2	3.6	4.1	9
Jobs in information and communication	**5.2**	6.2	8	5.6	4.3
Jobs in public administration and defence	**2.6**	5	3.1	4	4

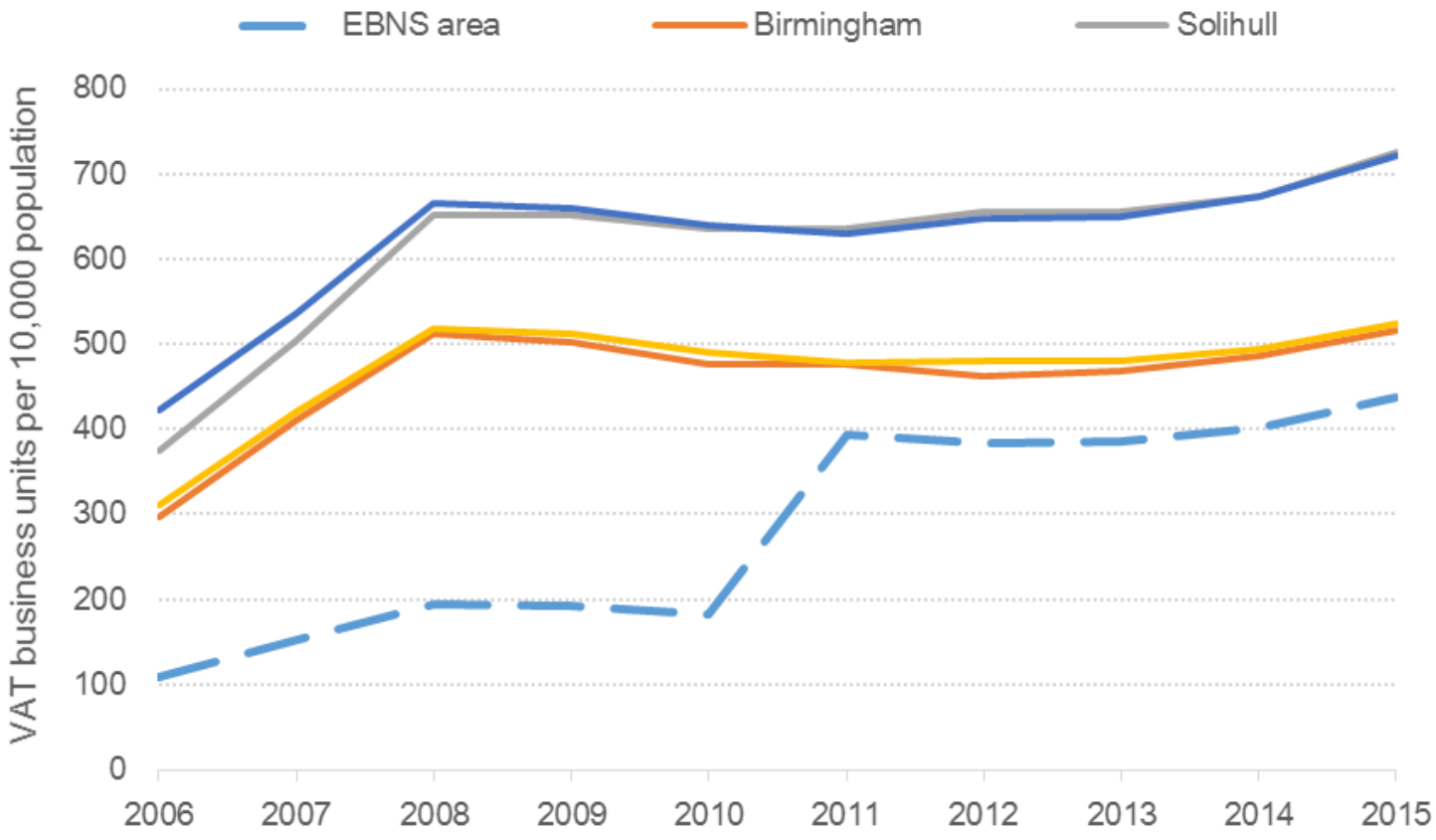
Dataset: *Jobs by broad industry group (based on the 2007 revision of the Standard Industrial Classification (SIC)) from the Business Register and Employment Survey (BRES) of approximately 80,000 businesses and weighted to represent all sectors of the UK economy. Based on actual jobs within each area, not resident population.*
Date: *2015*
Source: *BRES*

There are far fewer registered business per head in the EBNS area. However, the area is closing the gap on regional and national comparators

As shown by chart and table, EBNS has fewer VAT registered businesses per 1,000 population than England and the local authority areas of which it is part. However, this gap is closing, particularly driven by a sharp increase in business registrations per head in EBNS in 2010/11.

Area	VAT registered local businesses per 10,000 working age population
EBNS study area	436.9
Birmingham LA	515.6
Solihull LA	725.1
Combined authorities	523.9
England	721.9

Number of registered businesses



Dataset: *Shows the number of VAT based local business units per 10,000 working age population. The count of VAT registered local business units taken from the Inter-Departmental Business Register (IDBR), which is the comprehensive list of UK businesses. It provides the main sampling frame for surveys of businesses carried out by the ONS and by other government departments. It is also a key data source for analyses of business activity.*

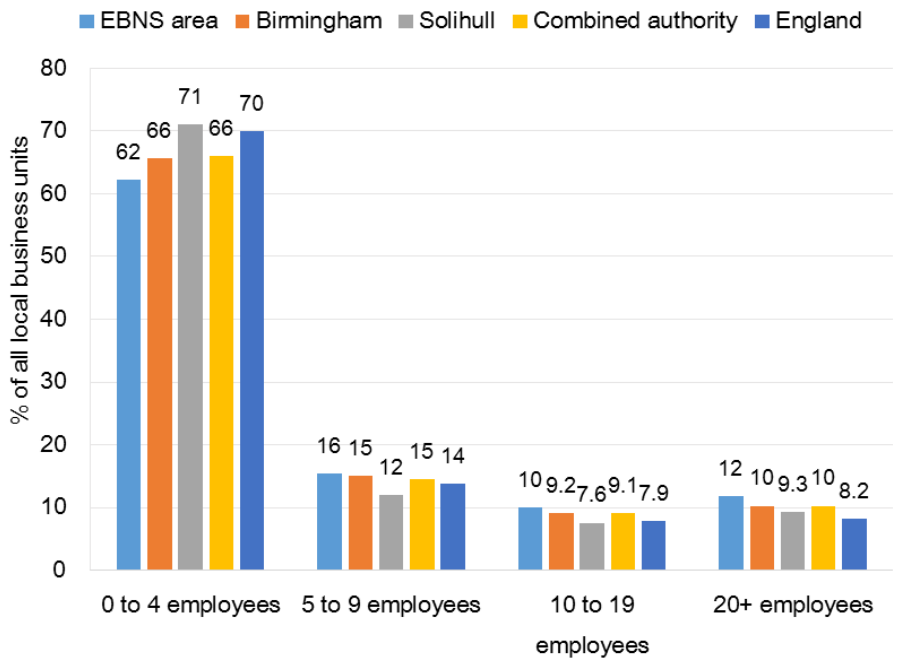
Date: *2015*

Source: *Office for National Statistics (ONS)*

EBNS has a higher proportion of larger businesses than average, with that employment concentrated in traditionally lower paid sectors

The chart below shows the proportion of all local businesses by number of employees. The table shows business units by sector and is ranked in order of the largest employing sectors within the EBNS area. It shows that wholesale and retail trade, manufacturing, education and human health and social work activities are the largest employers in the study area.

Proportion of businesses by size

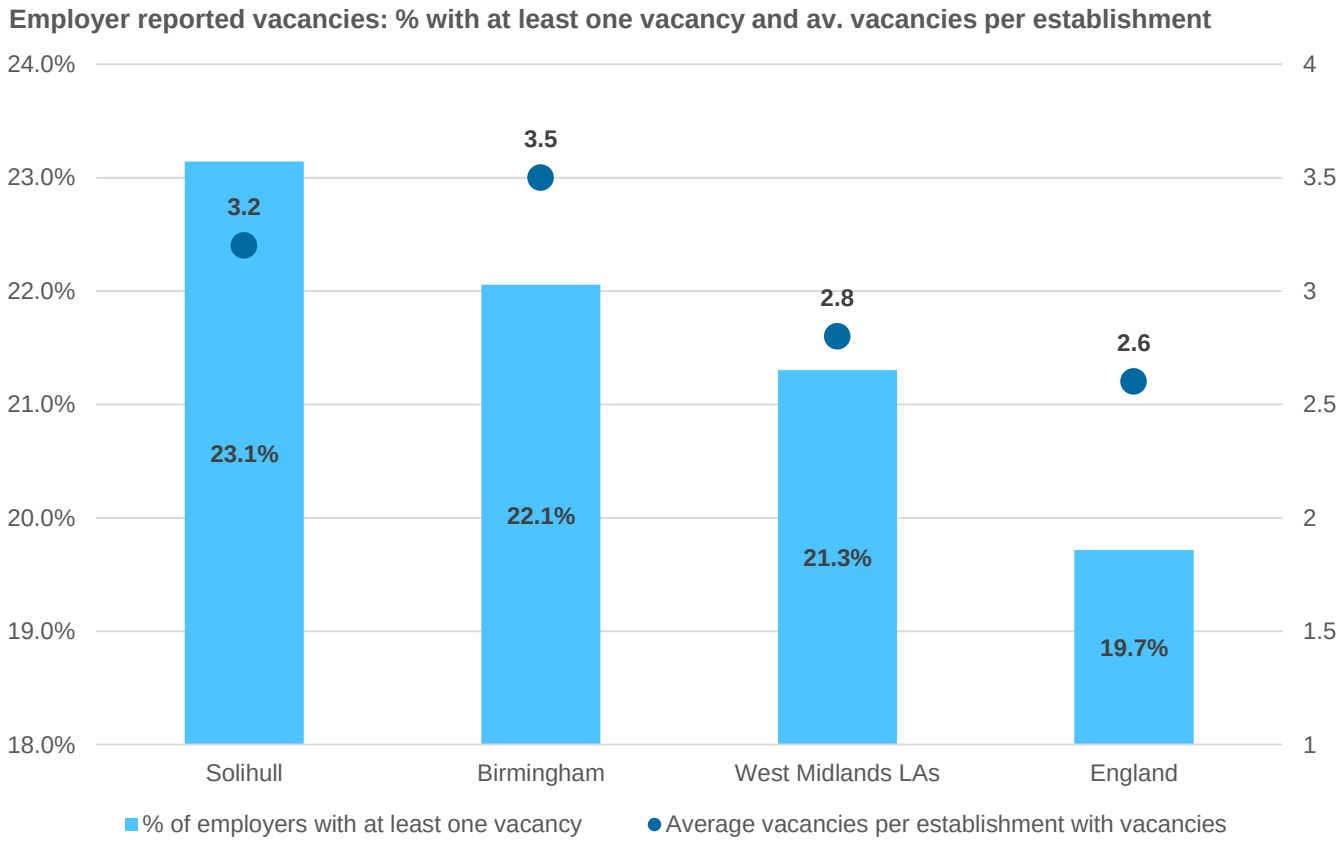


Businesses units by sector (% of all businesses in the area)	EBNS area	Birmingham	Solihull	Combined authority	England
Wholesale and retail trade; repair of motor vehicles and motor cycles	18.1	15.7	15.6	17.0	15.9
Manufacturing	11.7	9.2	10.0	11.7	8.8
Education	9.2	12.1	10.4	10.8	9.9
Human health and social work activities	9.2	12.1	10.4	13.5	9.9
Transport and storage	8.1	5.7	4.5	5.7	5.0
Construction	6.9	6.1	7.8	7.1	7.7
Accommodation and food service activities	6.7	6.3	4.8	5.4	5.6
Administrative and support service activities	6.5	5.3	5.3	5.0	4.9
Public administration and defence; compulsory social security	4.0	4.8	4.9	5.0	5.9
Other	3.9	4.6	4.3	4.4	5.0
Professional, scientific and technical activities	3.5	5.6	7.1	5.9	6.7
Financial and insurance activities	3.5	4.0	5.1	3.7	4.4
Information and communication	2.3	3.0	4.4	2.8	4.1
Real estate activities	1.3	1.5	1.6	1.4	1.5
Water supply; sewerage, waste management and remediation activities	0.8	0.6	0.8	0.8	0.7
Electricity, gas, steam and air conditioning supply	0.5	0.5	1.5	0.7	0.6
Agriculture, forestry and fishing	0.1	0.1	0.2	0.1	0.8
Mining and quarrying	0.0	0.0	0.0	0.0	0.2

Some labour market evidence sends conflicting messages. Solihull and Birmingham have a higher rate of businesses with job vacancies than the national average – but the proportion of 'hard to fill' vacancies is lower

This chart shows employer-reported job vacancies for Solihull and Birmingham authorities and comparator areas (England and West Midlands local authority averages). Both Solihull and Birmingham are above the national and regional averages for businesses with vacancies as well as for average number of vacancies. This suggests that job prospects in the wider area surrounding the ESBN area are relatively strong – leading to questions why the rates of labour participation are not higher in EBNS. The evidence suggests that employers might not be finding the right skill set in EBNS workers.

By contrast, the table below shows that there are fewer 'hard to fill' vacancies in businesses in Solihull and Birmingham than the national average. The evidence does to provide a very clear picture



Total vacancies and hard to fill vacancies

Summary of vacancies	Solihull		Birmingham		Combined authorities		England	
Total vacancies	4,096		16,425		36,411		797,440	
Hard-to-fill vacancies	898	21.9%	3,866	23.5%	11807	32.4%	262,337	32.9%

Dataset: *This data is derived from the UK Commission for Employment and Skills (UKCES) Employer Skills Survey, a modelled survey of 91,000 employers,* **Date:** *2015,* **Source:** *UK Commission for Employment and Skills (UKCES)*

Early years, school and FE provision

Key issues

- Schools underperform, but there are differences in outcomes within the area
- HE involvement is relatively low
- Providing young people with better insights into job opportunities could be important
- Big cities can make dramatic improvements in educational outcomes over time

Why is this issue important? A brief review of the literature and local context

Schools' performance has very significant long term economic implications. People entering the school system now will enter the labour market between 2033 and 2035 and leave the labour market around 2075. Improving underperforming schools would represent a major long term economic development strategy in itself.

Evaluation evidence collated for OFSTED (2013) finds that "there is now little doubt that early education for low income and ethnic minority children can contribute importantly to combating educational disadvantages if certain criteria are met". The work indicates that the design of programmes and the approach to pedagogy and curriculum is crucial to success. The review quotes European Union research that "low intensive, low dose, late starting, mono-systemic approaches are less effective overall. A didactic or academic approach in a negative socio-emotional climate may do more harm than good. Early starting, intensive, multi-systemic approaches that include centre-based education and the involvement of trained professionals as a core activity are superior, with impressive long term results and very favourable cost benefit ratios. It is now clear that investing in accessible, high quality, early starting and intensive care and education provisions for young children is socially and economically very profitable" (EACEA 2009, 38). The OFSTED researchers find, though, that the problem is that many targeted early education programmes do not meet the criteria of quality and efficiency and many programmes are often temporary projects and vulnerable to economic trends.

School performance is strongly indicative of future deprivation. Labour Force Survey evidence suggests that the low skilled are at considerably increased risk of deprivation (ODPM). Work by the Treasury has placed skills as the most important determinant of productivity levels (and consequent earning ability). Low levels of basic skills in numeracy and literacy have very negative consequences for national productivity and for the affected individuals.

A culture of learning is something that is required across the range of skills. However, the Leitch Review a decade ago (Leitch 2006) found that this impacts disproportionately on those at the bottom end of the skills market who are disengaged from education at an early age and are trapped in inter-generational cycles of low attainment and low aspiration. The Leitch Review stresses that actions should therefore be targeted at this group of workers. As it is about embedding a culture of learning, some activity should also be directed before disengagement gets too deep. A possible action here may be a greater emphasis on non-cognitive skills. Inter-personal skills, for example, are highly valued by employers but not formally recognized. Carneiro, Crawford and Goodman found that social skills are important because they impact on achievement at schools and also directly on labour market performance. Further they found that there was a greater potential for mobility between quartile bands in social rather than cognitive skills.

Soft skills and a flexible culture of lifelong learning will be critical to create long term economic resilience. Professor Arturo Bris states "that 60% of the jobs for the next generation do not yet exist, and that 1 job in 5 will disappear in the next 5 years." (Bris 2016). The ability to adjust to change will be vital.

EBNS has a young population: there are approximately 98,000 people aged under 19 in EBNS

In Birmingham, birth rates are declining after sustained increase since 2010. Secondary school places are still in excess of demand.

In Solihull, following a period of steady increase up to 2015, birth rates have been gradually declining.

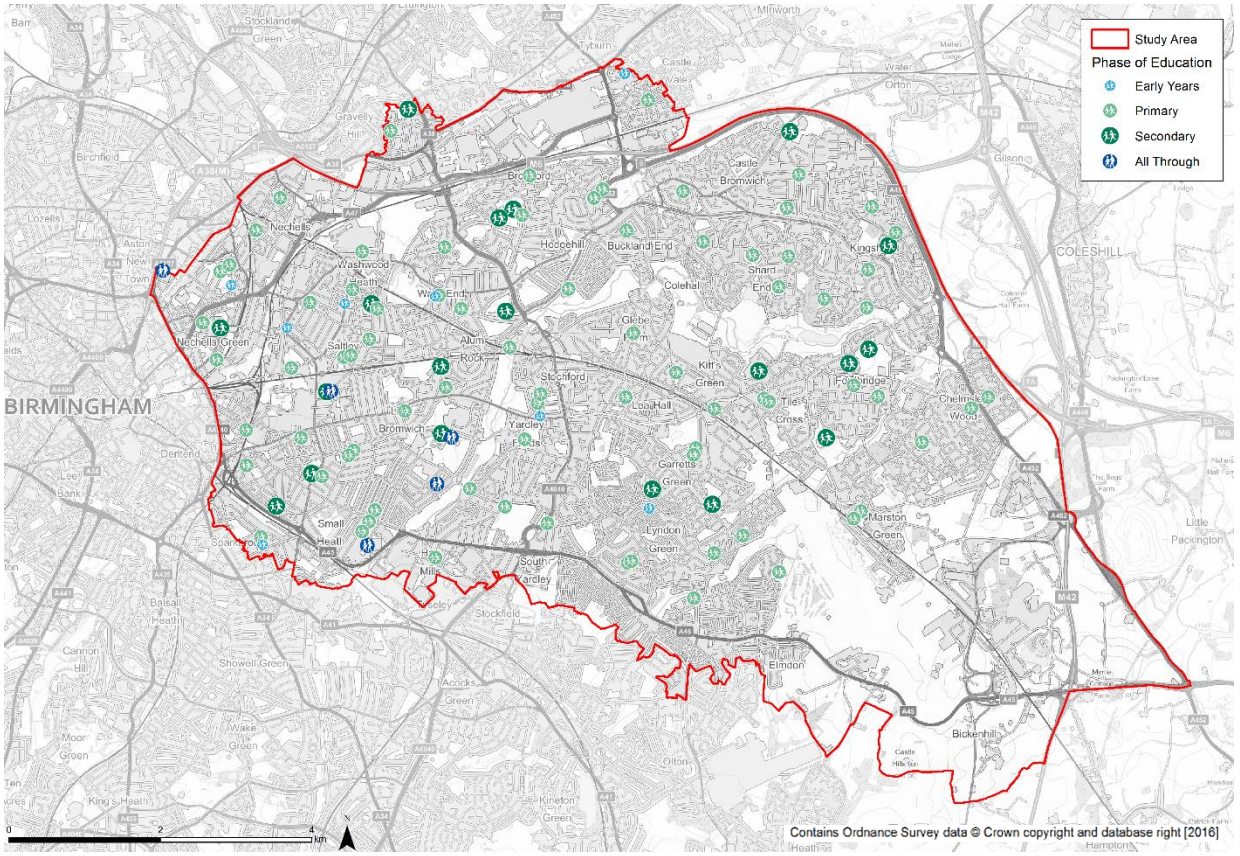
There are 131 state schools and nurseries across the EBNS area. EBNS has 86 primary and 28 secondary schools, across two authorities, and under a range of management systems.

In North Solihull there are no state owned nurseries. There are a total of eight state owned nurseries in EBNS, which are all located in East Birmingham.

There are also nine 'all through' schools in EBNS, most of which provide tailored facilities for 5-16 year olds.

Area	EBNS area	Birmingham	Solihull
No. of nursery age	21,120	68,763	9,767
Nursery as % of total pop.	7%	6.3%	4.7%
No. of primary age	35,866	113,213	17,779
Primary as % of total pop.	12.0%	10.3%	8.6%
No. of secondary age	36,700	103,376	18,061
Secondary as % of total pop.	12.3%	9.4%	8.7%

Distribution of schools in EBNS

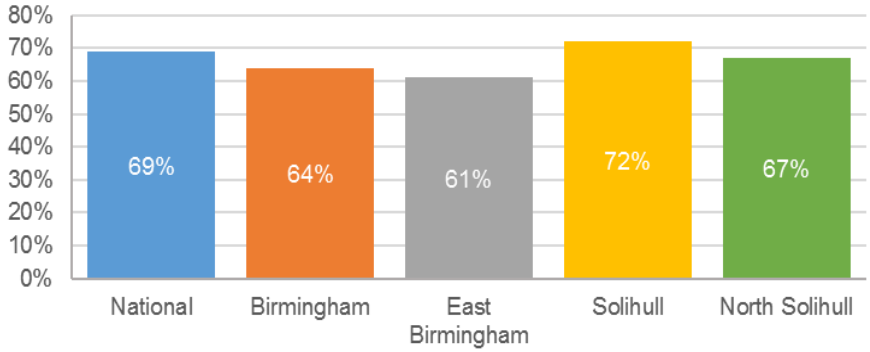


Dataset: *Location of Early Years, Primary, and Secondary facilities in EBNS*
Date: *2017*
Source: *BBC and SMBC*

Pupils in the EBNS area are less likely to meet their early years learning goals than those in the wider region and England

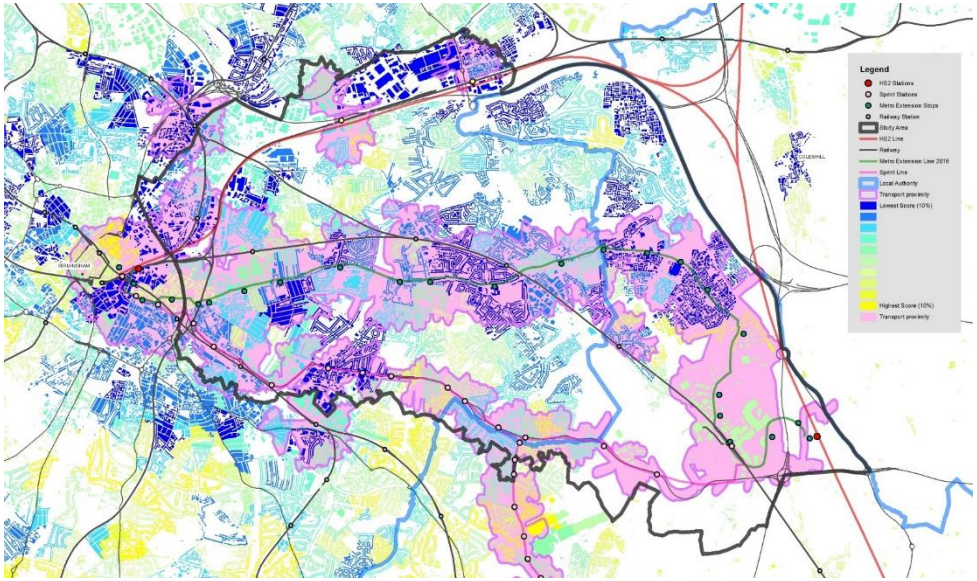
Data provided by BCC and SMBC shows that generally the proportion of children achieving a good level of development in EBNS is below the national average.
In East Birmingham, only 61% of early years pupil achieve a good level of development, compared to 64% in the City and 69% nationwide.
North Solihull is only just below the national average at 67%. However, when compared to the rest of Solihull this proportion is low, as the whole of Solihull sits at 72%.

Early years foundation stage (proportion of children achieving a good level of development) in EBNS



The map shows in yellow the areas considered to be within the top 10% of the UK for EYFS average score per pupil. Overall, EBNS has a lower EYFS score than the individual local authorities or England.
The highest early years score in North Solihull is between Smith's Wood and Castle Bromwich, with a small area towards the north of Bickenhill. There are small pockets of Washwood Heath which are considered within the UK top 10% of EYFS scores.

Distribution of Early Years Foundation Stage scores



Dataset: *Average Point Score per pupil at the Early Years Foundation stage (an assessment of pupils in foundation year at school (aged 4 to 5).There are 7 areas of learning covering 17 early learning goals (ELGs). A child is scored 1 for emerging, 2 for expected, and 3 for exceeded. Therefore the minimum score is 17 points and the maximum possible score is 51 points.*
Date: *2013/14*
Source: *Department for Education (DfE)*

Area	Early Years Foundation Stage (EYFS) average point score
EBNS study area	32.0
Birmingham LA	33.3
Solihull LA	34.5
WMCA constit LAs	33.0
England	33.9

In the Birmingham part of EBNS, there is a 66% take up of Early Education Entitlement for eligible 2 year olds and 88% for 3-4 year olds. This is lower than the Birmingham city wide take up

Information from BCC has shown that the take up of early years education in the East Birmingham part of EBNS is lower than the city-wide take up. The graphs shows the two year old Early Education Entitlement (EEE), revealing the proportion of children that are eligible for EEE, and the percentage of those that are eligible that are accessing EEE. There are certain wards which match the city-wide take up, but most are lower. Take-up is at its lowest in Bordesley Green, where only 61% of those that are eligible are accessing EEE. For the take up of EEE at 3-4 year old level Bordesley Green and Shard End show the lowest take up at 83%.

The information displayed for North Solihull cannot be directly compared with that for East Birmingham. However, it does show the different take up of early education amongst 2-4 years olds. In North Solihull, Smith's Wood has the lowest take up of early years education, at 39% for two year olds, and only 17% for 3-4 year olds.

The EYFSP summarises and describes pupils' attainment at the end of the EYFS.

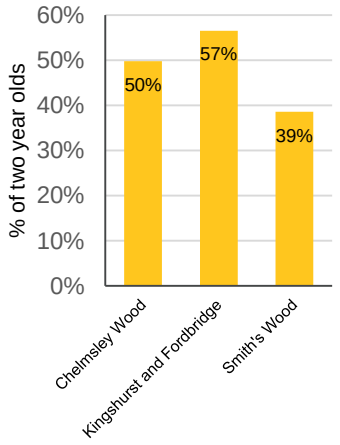
The purpose of the assessment is to gain insight into levels of children's development and their readiness for the next phase of their education

The EYFSP gives: the pupil's attainment in relation to the 17 early learning goals (ELG) descriptors; and. a short narrative describing the pupil's 3 characteristics of effective learning

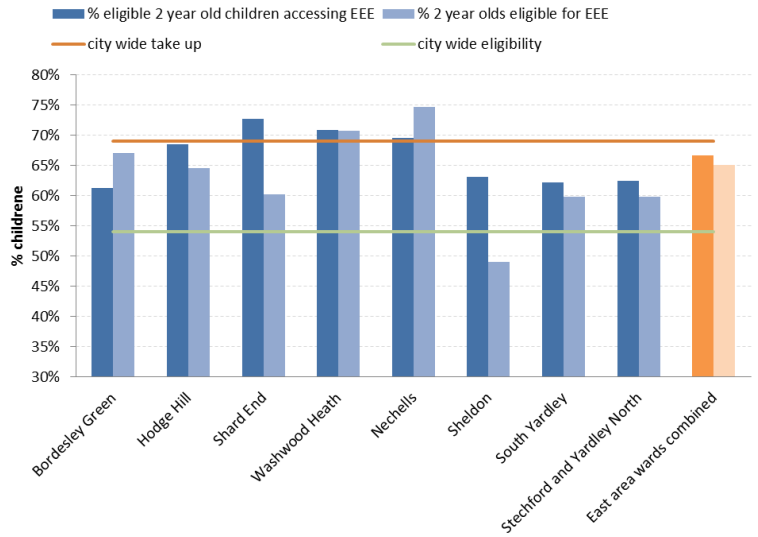
"Good Level of Development" is a standard way of measuring performance. A child achieves GLD if they achieve "expected level" in:

- the early learning goals in the prime areas of learning (personal, social and emotional development; physical development; and communication and language) and;
- the early learning goals in the specific areas of mathematics and literacy.

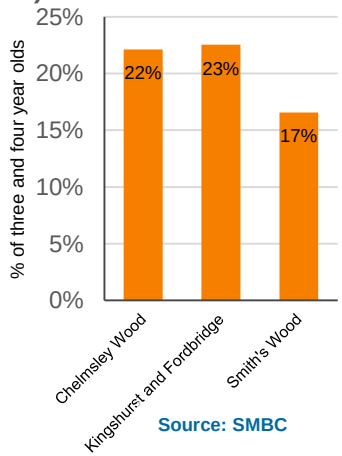
Two year old Early Education take-up (North Solihull wards)



Two year old Early Education Entitlement (East Birmingham wards)

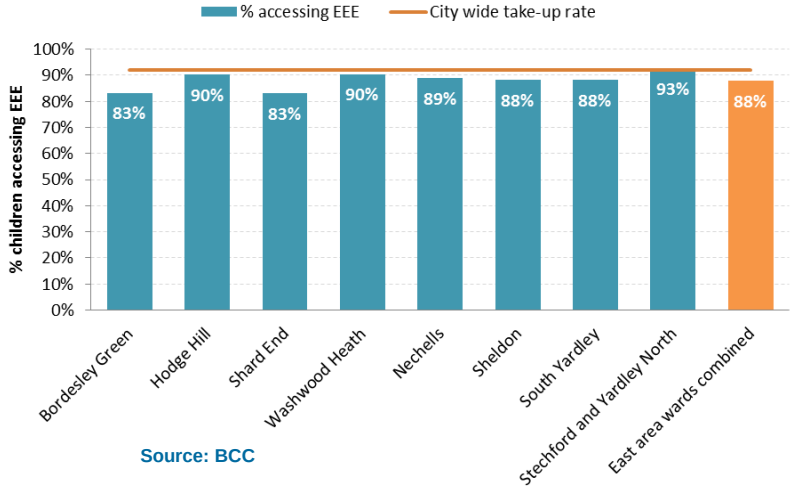


Three and four year old Early Education take-up (North Solihull wards)



Source: SMBC

Three and four year old Early Education Entitlement (East Birmingham wards)



Source: BCC

Key Stage 1 results are also slightly lower than the England average. The LSOAs ranked with the lowest scores roughly align with the proposed route of the metro line

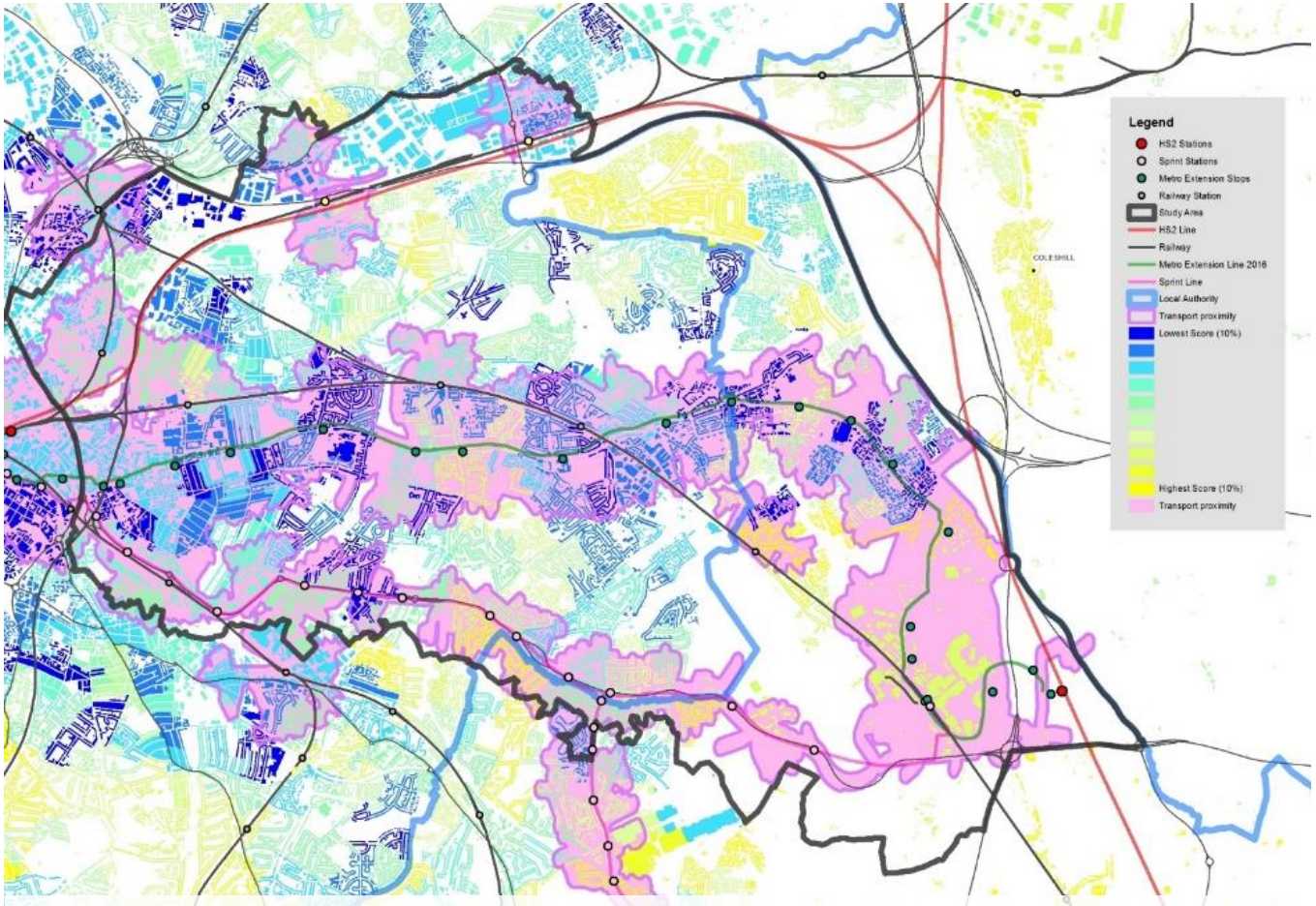
As shown by the table below, the EBNS area scores the lowest on average point score at Key Stage 1 compared to regional and national comparators.

The map shown the results of the Key Stage 1 examinations, revealing that Castle Bromwich is one of the best performing areas in EBNS.

Following a similar pattern to the unemployment data described previously, there are large clusters of the EBNS area, particularly in the east and south east, which are within the lowest 10% of England's LSOAs.

Area	Key stage 1 pupils average point score
EBNS study area	15.5
Birmingham LA	15.6
Solihull LA	16.7
WMCA constit LAs	15.7
England	15.9

Key Stage 1 examination results



Dataset: *Average Point Score per pupil for pupils sitting Key Stage 1 (KS1) examination assessments. KS1 is the National Curriculum standard test for seven year olds. This is made up from the Reading, Writing, Mathematics and Science point scores.*

Date: *2013/14*

Source: *Department for Education (DfE)*

Key Stage 2 pupils are less likely to achieve the expected levels of development than elsewhere. This is more widespread than in KS1 and affects pockets of the EBNS area

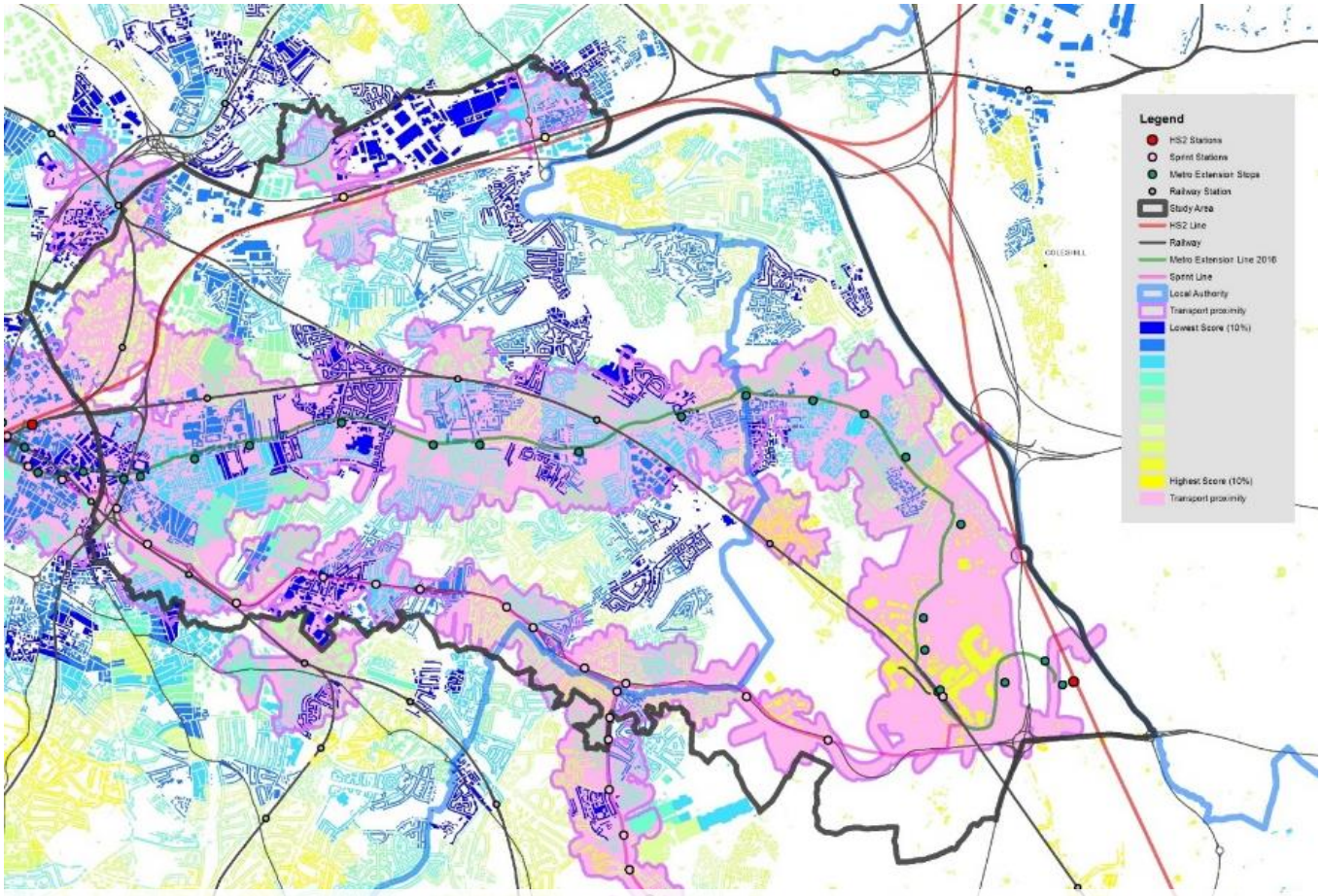
Within North Solihull, the poor areas of attainment are clustered near Kingshurst and Fordbridge, and in East Birmingham it is nearer the City.

Overall Solihull LA has a high level of attainment at KS2. The EBNS area has a low level of attainment in KS2 reading, writing and maths, at only 71.5% against a national average of 78%.

In East Birmingham, when the different subjects are broken down, the gap between the expected standard and what is achieved for reading is 13%.

Area	Pupils achieving Key Stage 2, Level 4 in Reading, Writing and Maths (2013/14)
EBNS study area	71.5%
Birmingham LA	75.0%
Solihull LA	80.0%
WMCA constit LAs	76.3%
England	78.0%

Key Stage 2 examination results



Dataset: *The proportion of pupils achieving level 4 in Reading, Writing and Mathematics at Key Stage 2 (KS2). Level 4 is the expected level for most 11 year olds.*

Date: *2013/14*

Source: *Department for Education (DfE)*

GCSE results are lower in the EBNS area on average than across England. The areas which are ranked within the lowest 10% of English SOAs include part of Castle Bromwich, Smith's Wood, Kingshurst, Fordbridge, Shard End and Shelton

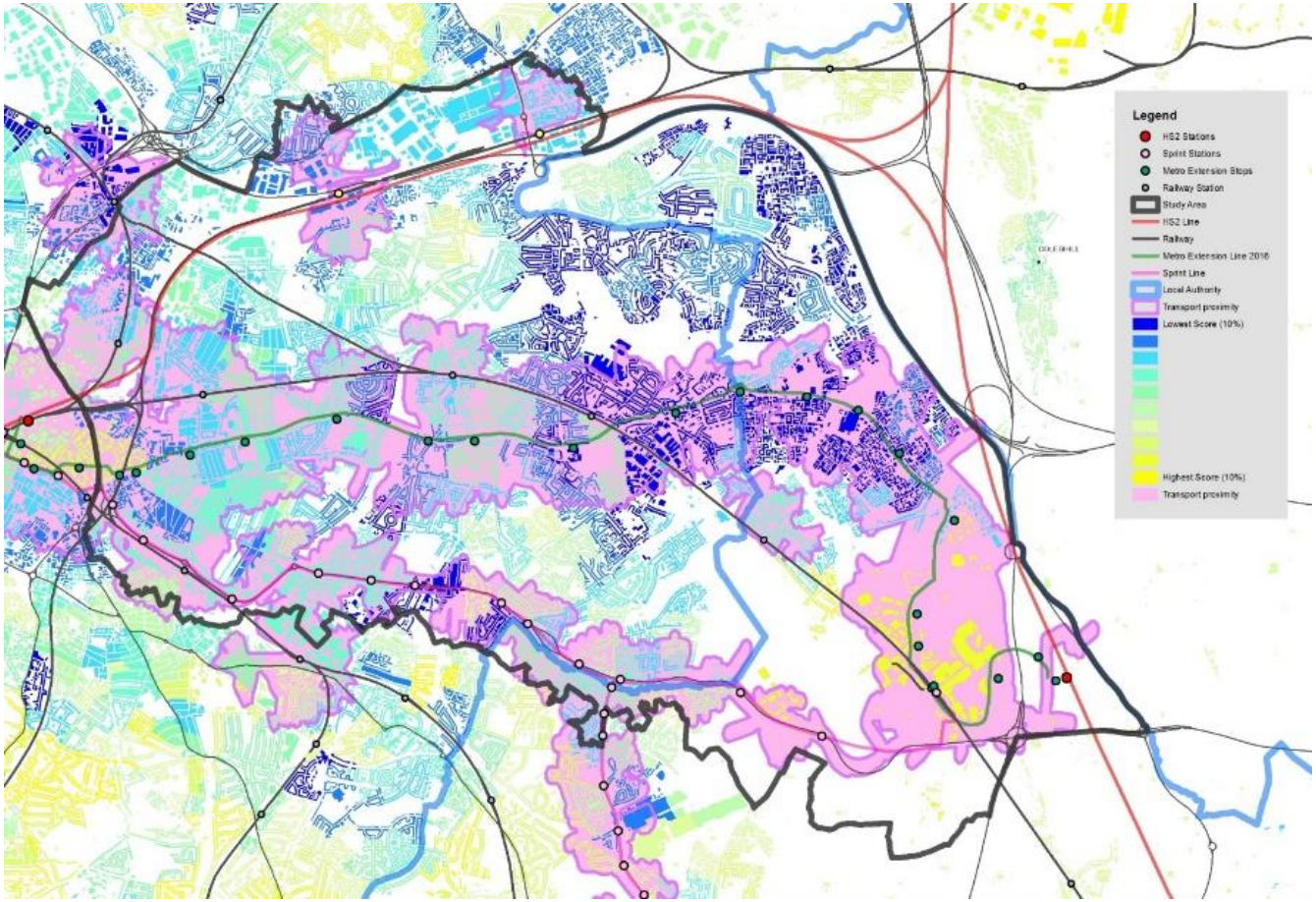
It is clear from the table below that the GCSE score per pupil in EBNS is significantly lower than elsewhere.

Solihull LA has a higher GCSE average point score per pupil than the national average, showing that the rest of the LA does not face the same issues as North Solihull.

At GCSE level, the worst performing areas are in the very east of Birmingham and the north west of North Solihull.

Area	GCSE average point score per pupil
EBNS study area	318.6
Birmingham LA	356.2
Solihull LA	399.3
WMCA constit LAs	353.1
England	368.0

Key Stage 4 examination results



Dataset: *Average Point Score per pupil for pupils sitting Key Stage 4 (GCSEs) exams. Average Point Score is a measure of the average attainment of pupils across all subjects for pupils resident in the local area. At Key Stage 4, Average Point Score is made up of all GCSE examinations sat, with a point score of 58 awarded to those receiving and A*, 52 for those with an A, 46=B, 40=C, 34=D, 28=E, 22=F, 16=G. These scores are added up for all pupils and all subjects and divided by the number of pupils in the area.*

Date: *2013/14*

Source: *Department for Education (DfE)*

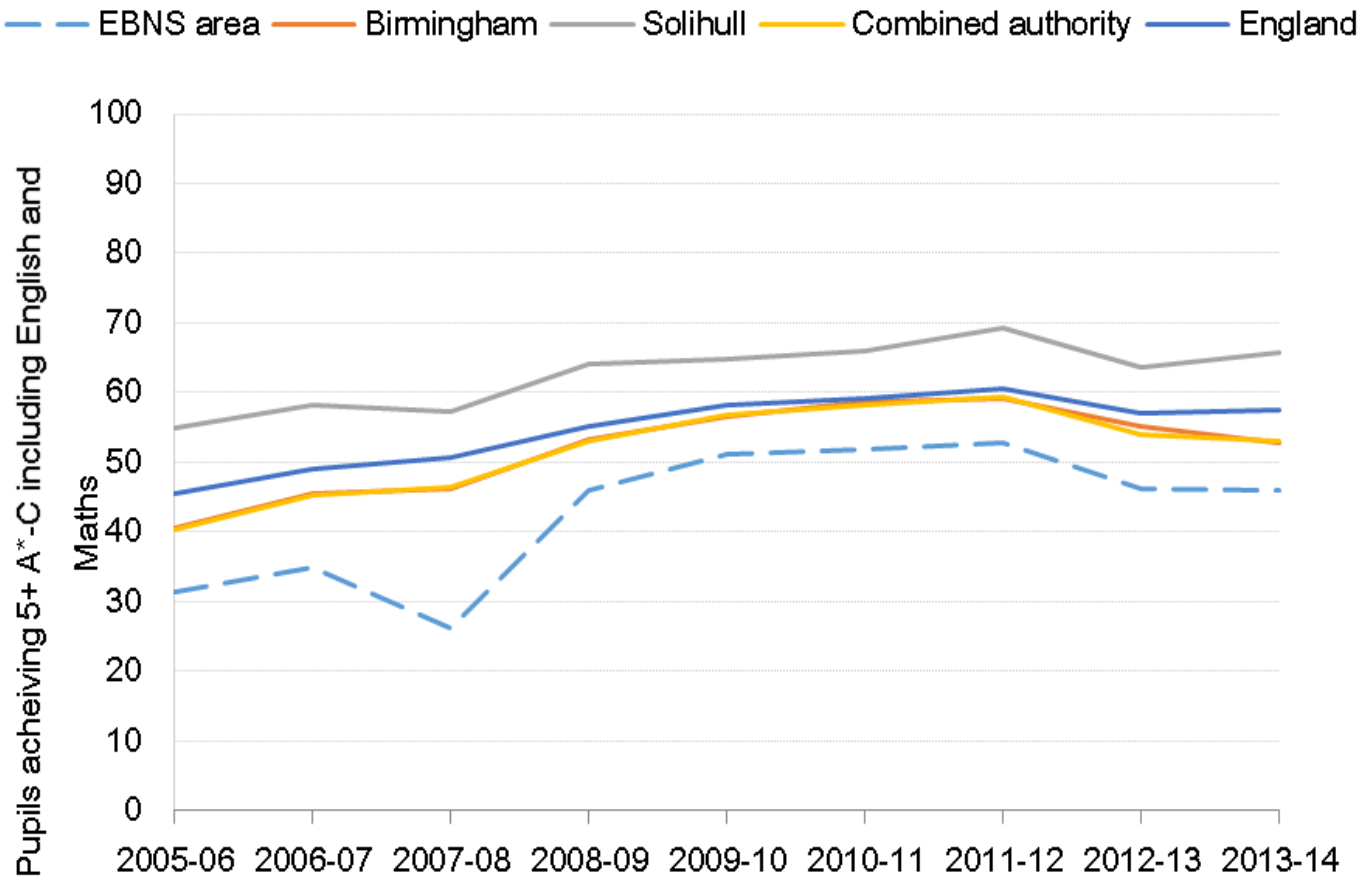
GCSE results (A*-C) in the EBNS were improving at a faster rate than the national average between 2005 and 2013, but EBNS saw a larger fall between 2012 and 2014 than across the comparator areas

The table below shows that Birmingham, Solihull and England all experienced a decline in the proportion of pupils achieving a GCSE grade between 2011/12-2013/14. The decline in the EBNS area was much more significant than that for England and Solihull, but in line with that for Birmingham.

The dip in the EBNS data in 2010 is an anomaly; it was caused by one of the schools not using an English qualification that officially counted within the performance tables.

Area	Change in % gaining GCSE grades A*-C between 2011/12 and 2013/14
EBNS study area	-6.9
Birmingham LA	-6.4
Solihull LA	-3.5
WMCA constit LAs	-6.5
England	-3.2

A-C GCSE grades by location 2004/05-2013/14



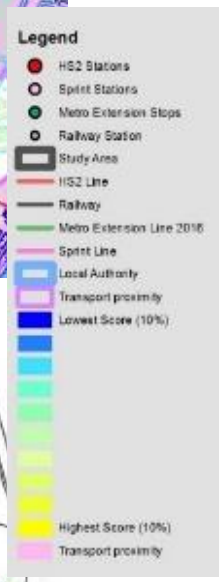
Dataset: *Pupils achieving % GCSE grades A*-C by location of pupil residence*
Date: *2004/05 to 2013/14*
Source: *Department for Education (DfE)*

Data suggest that there are different ‘trajectories of success’ by areas within EBNS. Bordesley Green educational outcomes improve from early years, Key Stage 2 and Key Stage 4 (GCSE). In Chelmsley Wood, early years pupils begin disadvantaged, improve during primary stages, but slip back at GCSE

Bordesley Green Early Years

Bordesley Green Key Stage 2

Bordesley Green Key Stage 4 (GCSE)



Chelmsley Wood Early Years

Chelmsley Wood Key Stage 2

Chelmsley Wood Key Stage 4 (GCSE)

The data suggests that there is an encouraging picture of improvement in Bordesley Green, where pupils start with relative disadvantages but gradually catch up, and perform relatively well at GCSE. Performance in Chelmsley Wood improves, but then falls back at GCSE. More detailed work would be needed on underlying reasons, but we understand that, in Bordesley Green, English is sometimes not spoken at home, and childcare take-up is low. Improvements are made through the primary sector, and through some strong secondaries and ‘through schools’. In contrast, some of the stronger performing secondary schools and a pro-education home culture might not be in place to the same extent in parts of North Solihull.

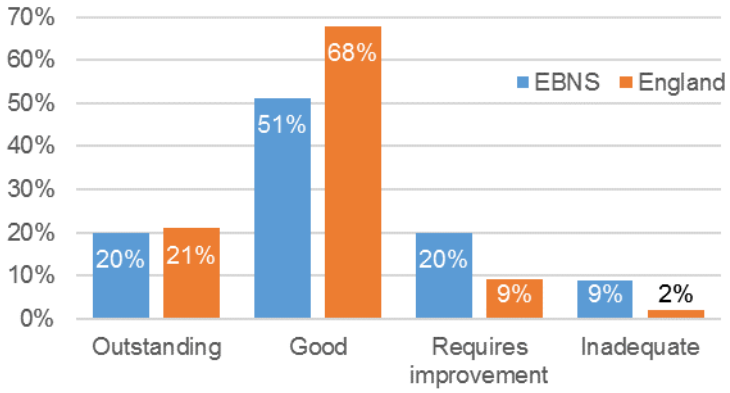
According to the most recent Ofsted ratings, 71% of schools and nurseries in EBNS are rated Good or Outstanding, compared to 89% in England

The most recent Ofsted data shows that there is a significant proportion of schools and nurseries in EBNS rated as requires Improvement or Inadequate. There are 29% of these schools in EBNS compared to 11% in England.

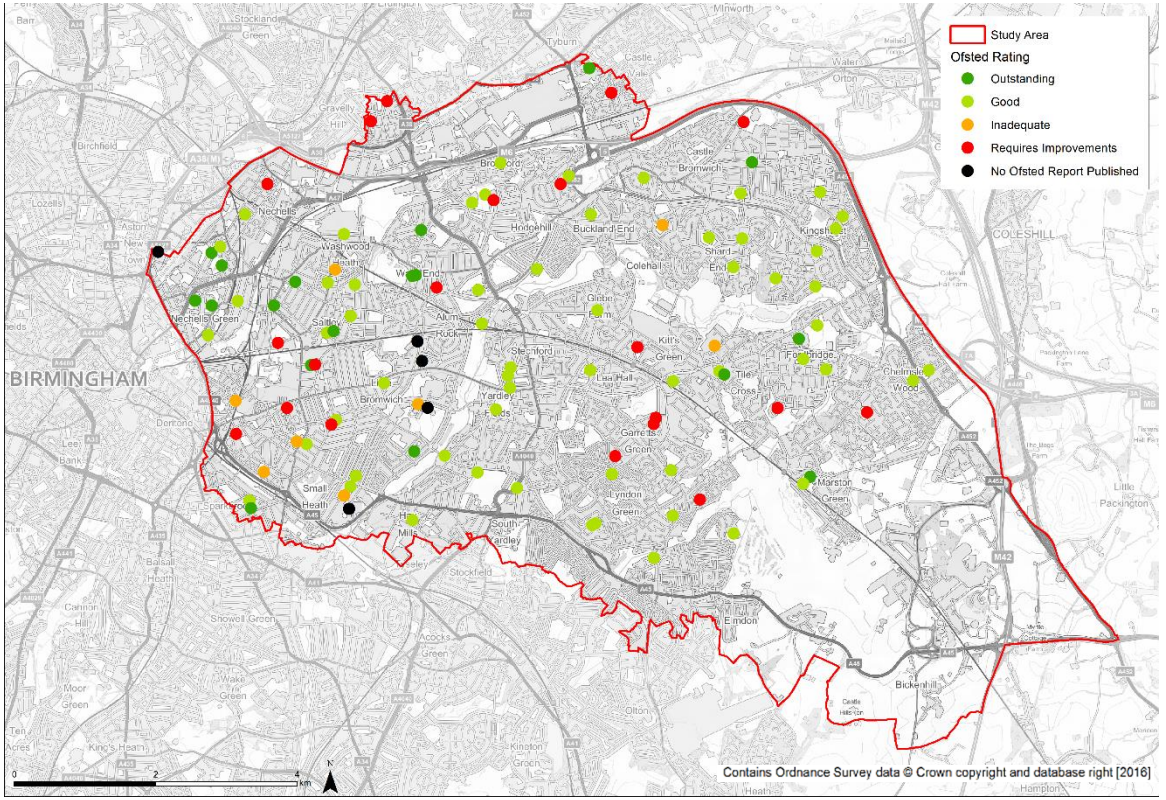
All of the Inadequate schools are located within East Birmingham. The map to the right shows that the schools rated poorly by Ofsted cluster within Small Heath and near Lea Hall.

Generally, the Good schools are evenly distributed throughout EBNS. There is a significant cluster of Outstanding facilities in Nechells Green. All nurseries in EBNS are considered Good or Outstanding. This is compared to 75% of primary and 54% of secondary schools.

Ofsted rating in EBNS



Location of schools and their Ofsted rating in EBNS



Dataset: The most recent Ofsted ratings for EBNS schools and nurseries
Date: *2017*
Source: *Ofsted*

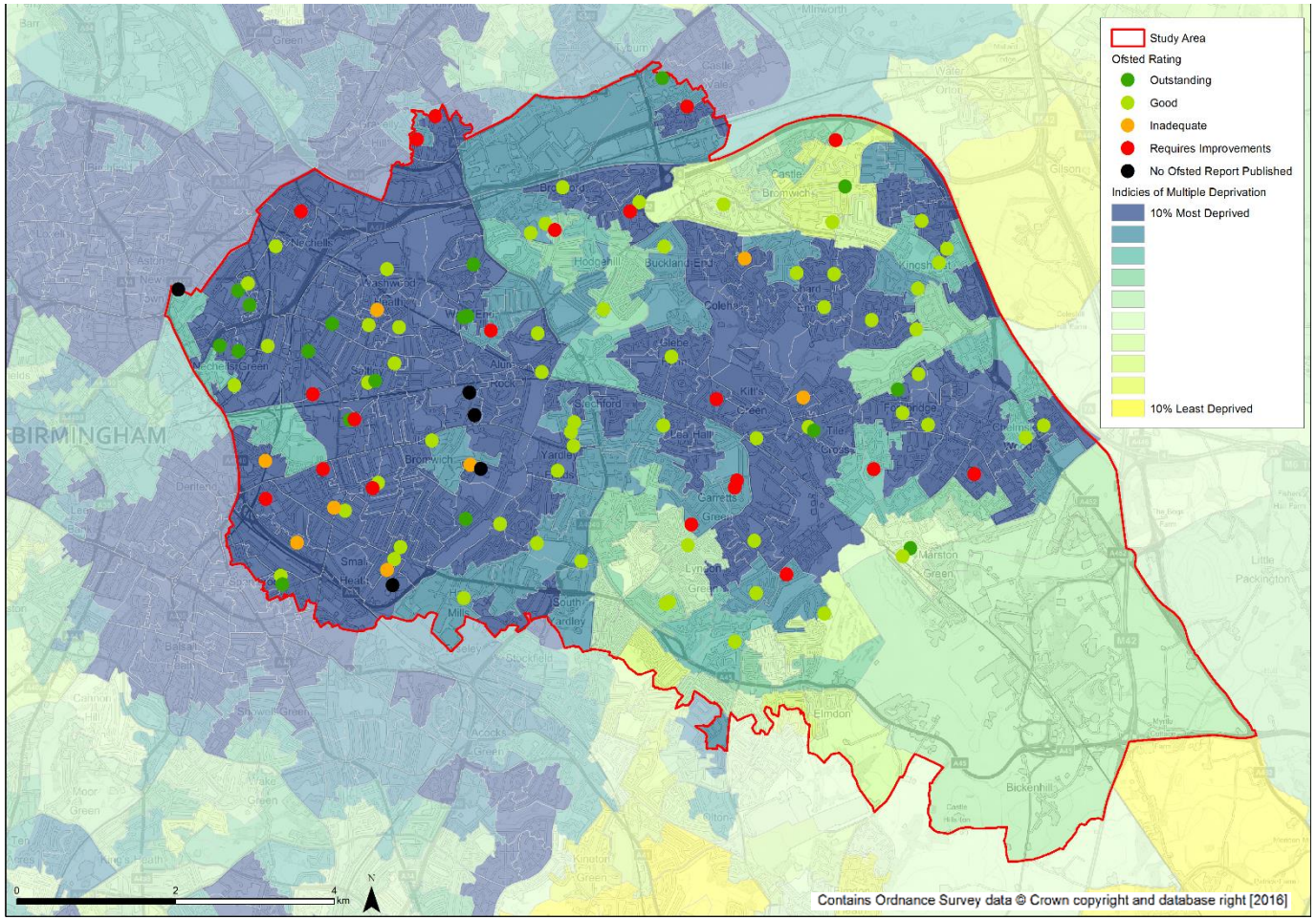
In EBNS, there appears to be no clear relationship between area deprivation as ranked on the Index of Multiple Deprivation and OFSTED ratings

The map shows the Index of Multiple Deprivation with the Ofsted ratings of schools and nurseries in EBNS.

Not all poorly rated schools are in deprived areas. For example, Park Hall Academy in Castle Bromwich was rated 'requires improvement', but it is not located within one of the significantly deprived areas.

Furthermore, some of the highest rated facilities are within highly deprived areas, for example, the schools in Nechells.

School Ofsted ratings and the IMD



Dataset: The most recent Ofsted ratings for EBNS schools and nurseries, overlaid with the rank of the Index of Multiple Deprivation
Date: *2017*
Source: *Ofsted and IMD*

There are a range of schools with sixth forms and sixth form colleges, but these are unevenly dispersed throughout EBNS

There are eight schools and colleges providing sixth form facilities in North Solihull, and in East Birmingham there are seven.

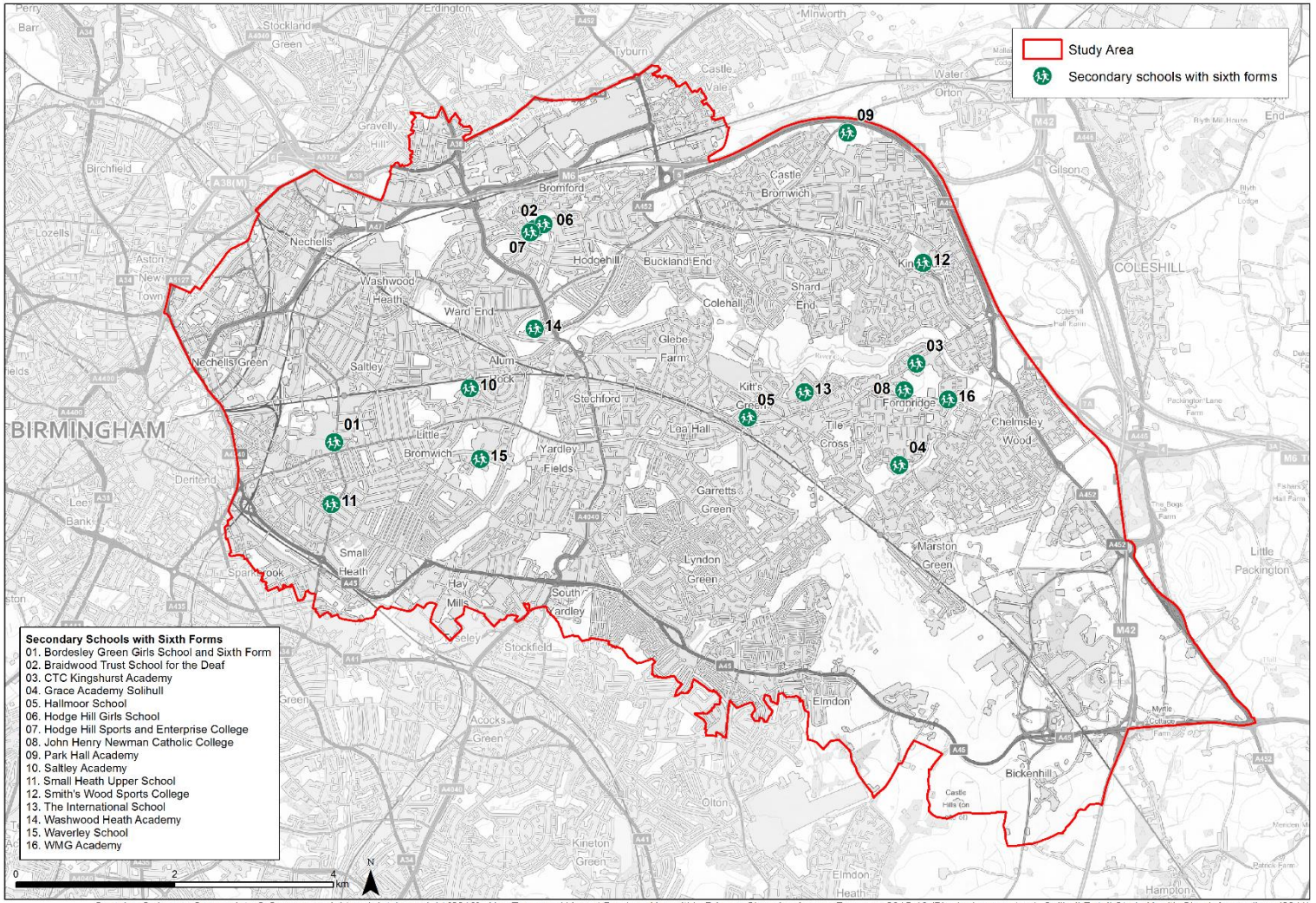
The map shows that there are no sixth form facilities in the centre of EBNS. In North Solihull the facilities tend to cluster between Fordbridge and Lea Hall, with near to no provision in the rest of the area.

Dataset: *Location of secondary schools and colleges with sixth form facilities in EBNS*

Date: *2017*

Source: *BCC and SMBC*

Location of secondary schools and colleges with sixth form facilities



London has achieved significant improvements in schools performance in the last 17 years. Can EBNS learn from this experience and do the same?

London schools have improved significantly since 2000, at a faster rate than anywhere else in the country.

Some explanations suggest that improvements in KS4/GCSE results are best ascribed to changes in primary school attainment from year 2000 onwards (IFS/Institute for Education 2014). Later research by an IFS/LSE team (2015) suggests that the "London effect" for poor children began in the mid-1990s – well before many of the high-profile policies in secondary schools previously credited with London's success, such as the London Challenge, Teach First, and the growth of academies. This research suggests that improved performance largely reflects gradual improvements in school quality over time. Improvements in primary schools played a major role in explaining later improvements in secondary schools.

Other research disagrees (Centre for London, CBFT 2014). These researchers suggest that four key school improvement interventions *did* provide the impetus for improvement - London Challenge, Teach First, the academies programme and improved support from local authorities was responsible for the change, and identifies common features that link together all of these interventions:

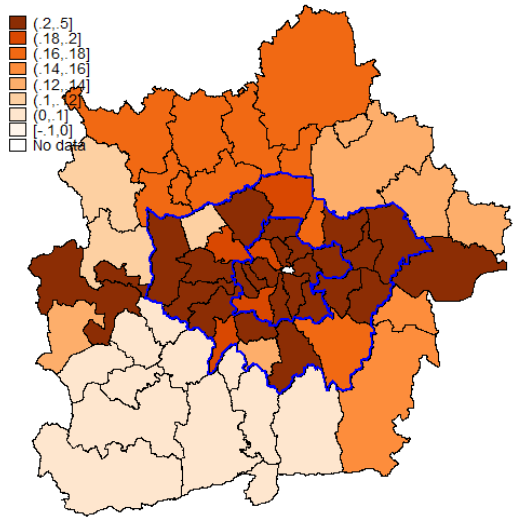
- a focus on data and data literacy
- a culture of accountability
- the creation of a more professional working culture
- a collective sense of possibility and highly effective practitioner led professional development.
- effective leadership at every level of the system.

Whatever the underlying cause of change, Birmingham could look at how to replicate these changes. There is clearly no certain relationship between deprived areas and poor educational outcomes. Social Mobility and Child Poverty Commission (2014) reported on the relationship between disadvantage and education provision: "Some schools seem to have learnt the secret of how to alleviate the impact of background on life chances. They have found a way of overcoming the barriers that impede social mobility. At a time when social mobility is stalling and child poverty is rising, there is an urgent need to share the lessons so that every school can crack that code."

The key findings of the report were that the wide variation in results between schools with similar intakes shows that there is a lot of scope to raise performance. Secondly, some schools will need to shift their focus towards core academic subjects and raising attainment across the whole ability range to avoid falling in national league tables and - most importantly - to improve social mobility for their pupils. Thirdly, some teachers' expectations of students from disadvantaged backgrounds are too low and getting the best teachers to teach in the worst schools requires stronger incentives, including higher pay. And finally, schools could

A) use the Pupil Premium strategically to improve social mobility
B) build a high expectations, inclusive culture
C) incessantly focus on the quality of teaching
D) tailor strategies to engage parents
E) prepare students for all aspects of life - not just for exams

Change in proportion of pupils eligible for FSM achieving five or more GCSEs at A*–C including English and maths (or equivalent), across London local authorities, 2002–12

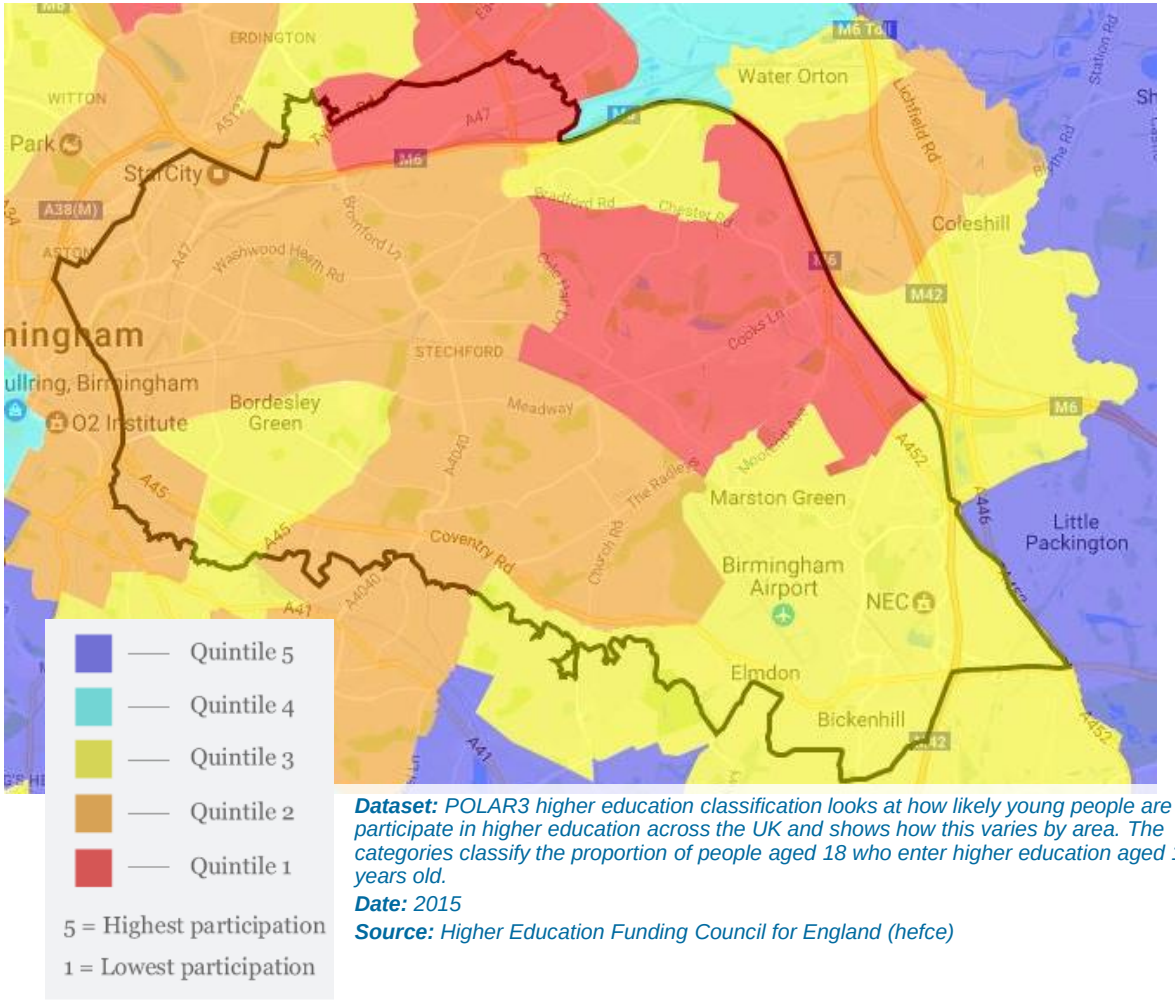


The EBNS area has low levels of higher education participation amongst 18 and 19 year olds

HE (Higher Education) refers to courses for which the level of instruction is above that of level 3 of National Qualifications Framework - mainly people studying for degrees.
S**ome areas have reasonable access rates** (southern parts of Bordesley Green and Castle Bromwich) but there are pockets of very poor rates of access, particularly around Chelmsley Wood.

Area	HE participation (%)	POLAR3 Quintile
Acock's Green (B)	23.2	2
Hodge Hill (B)	25.1	2
Nechells (B)	26.0	2
Shard End (B)	11.0	1
Sheldon (B)	23.1	2
Small Heath (B)	30.0	3
Washwood Heath (B)	23.0	2
Yardley (B)	26.3	2
Bickenhill (S)	31.4	3
Castle Bromwich (S)	33.1	3
Chelmsley Wood (S)	11.1	1
Fordbridge (S)	11.2	1
Kingshurst (S)	12.4	1
Smith's Wood (S)	10.7	1

POLAR3 Higher Education participation



Dataset: *POLAR3 higher education classification looks at how likely young people are to participate in higher education across the UK and shows how this varies by area. The categories classify the proportion of people aged 18 who enter higher education aged 18 or 19 years old.*

Date: *2015*

Source: *Higher Education Funding Council for England (hefce)*

There are two Further Education (FE) providers in the study area (South & City College at Bordesley Green, and Solihull College Woodlands Campus). FE provision is hard to reach on public transport for some people

The only FE facilities in EBNS are located at Bordesley Green (South & City College) and Smith's Wood (Solihull College). As was shown with sixth form provision, FE facilities are non existent in the centre of EBNS.

The map shows the location of these FE facilities and the 10, 20, and 30 minute public transport isochrones for accessing them. This shows that people living in the north area of EBNS (Tyburn) and to the west of the airport (Sheldon), would have to travel for longer than 30 minutes to reach these FE facilities.

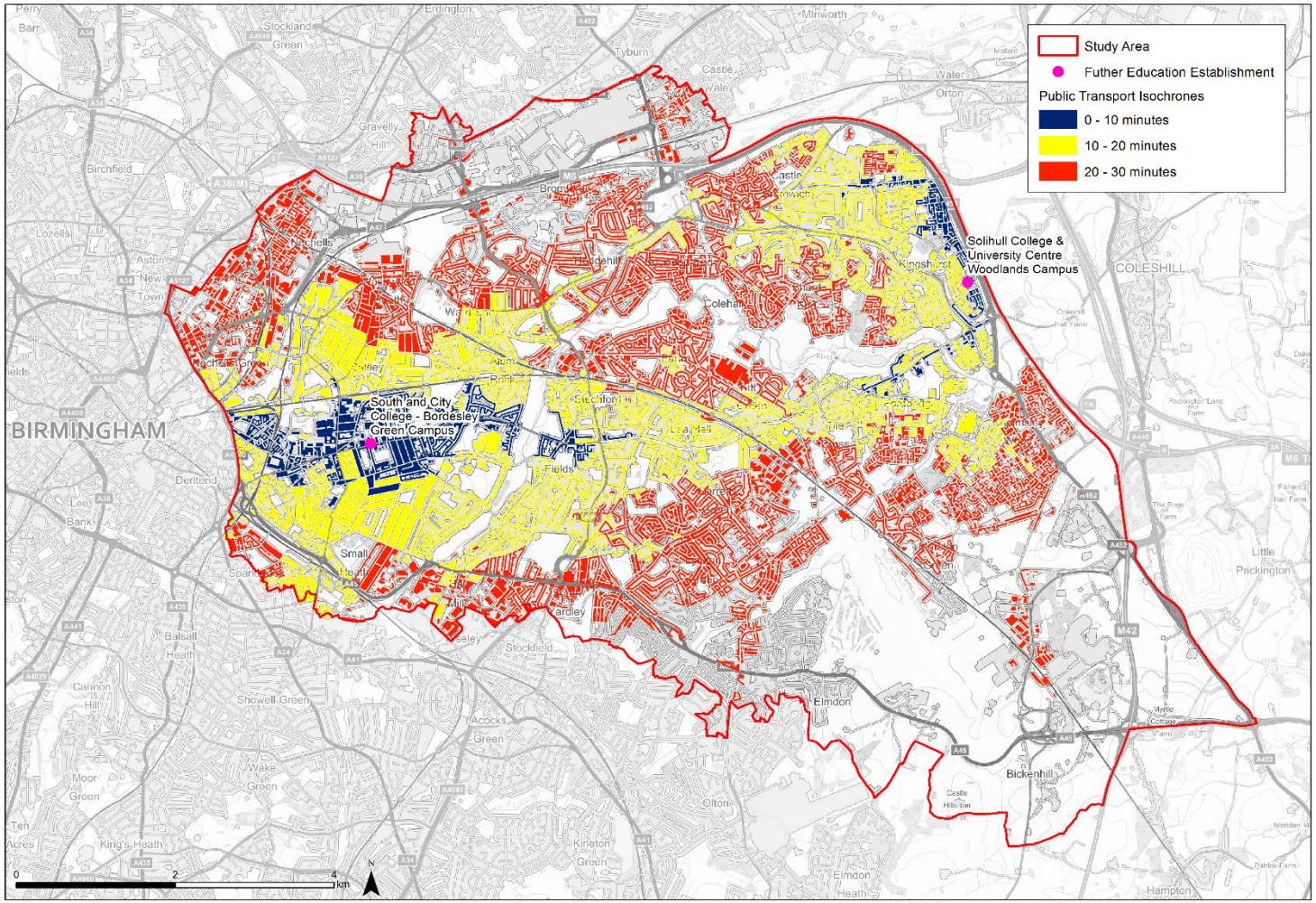
It is interesting to note that Tyburn and Sheldon both have significant levels of NEETs, at 7.4% and 5.4% respectively.

Dataset: *Location of FE facilities and existing public transport isochrones in EBNS*

Date: *2017*

Source: *BCC and SMBC*

Location of further education facilities in EBNS, and current transport isochrones (isochrone centred on both facilities)



Research elsewhere highlights the importance of clear ‘lines of sight’ from school to the workplace via high quality careers provision with employer engagement

London Councils have pulled together London Ambitions: Shaping a successful careers offer for all young Londoners (2015). The document was written by Dr Deirdre Hughes OBE, University of Warwick, Institute of Education Research. It states that “parents, employers, schools, colleges, training providers, universities and career development specialists - all will need to work together to keep up-to-date with and communicate effectively on fast changing education and labour markets.”

The document sets out seven evidence-based recommendations to establish a coherent framework for young people, and these might provide a good starting point for work in Birmingham, Solihull and the West Midlands. Those recommendations are as follows.

1. Every young person should have access to impartial, independent and personalised careers education, information, advice and face-to-face guidance in their local community.

2. Every young person should have completed at least 100 hours experience of the world of work, in some form, by the time they reach the age of 16. This may include career insights from industry experts, work tasters, coaching, mentoring, enterprise activities, part-time work, and other relevant activities.

3. Every secondary school and college should have in place an explicit publicised careers policy, reviewed by the governing body at least every three years. All schools and colleges should also report annually on delivery of the careers policy and curriculum.

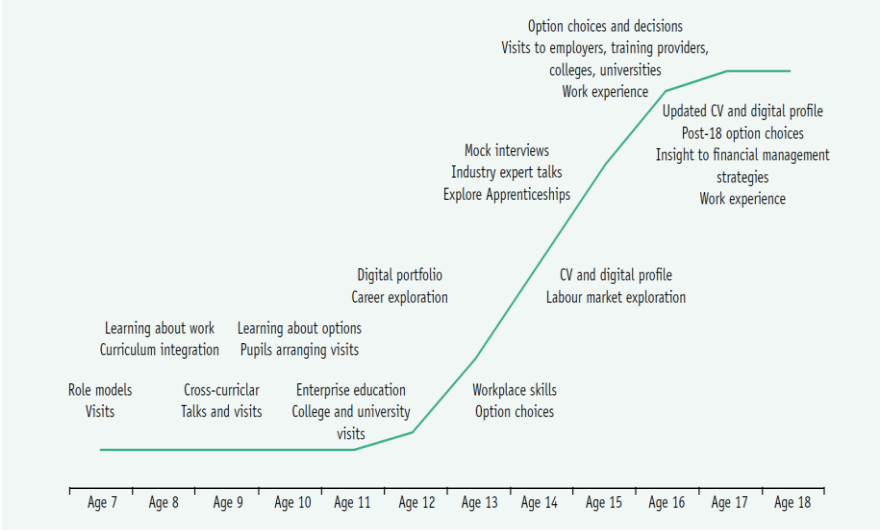
4. Every good institution will have a governor with oversight for ensuring the organisation supports all students to relate their learning to careers and the world of work from an early age.

5. Every secondary school and college should have up-to-date, user-friendly labour market intelligence/information (LMI) readily accessible by young people, teachers and parents/carers.

6. The quality of careers provision should be strengthened by developing ‘careers clusters’ to share resources in improving awareness of the labour market and supporting school and college leaders in a whole-school approach to plan and deliver careers provision.

7. An ‘Ambitions Portal’ should enable more schools and colleges to easily find high-quality careers provision designed to support career development.

100 hours experience in the world of work



Source: London Councils (2015) *London Ambitions*

Further education (FE) is undergoing a number of changes, in EBNS and across the sub-region. A virtual 'Institute of Technology' is being set up and the National College for High Speed Rail is opening on the EBNS boundary

Nationally, further education is being challenged to simplify and streamline its provision. The Independent Panel on Technical Education, headed by Lord Sainsbury, reported in April 2016. It looked at the post-16 skills system and advised Government on measures which could improve technical education in England.

The Independent Panel found that the system is over-complex, with a confusing array of courses and qualifications that are insufficiently linked to the world of work and the needs of employers. The panel found that individuals need access to a national system of technical qualifications which is easy to understand, has credibility with employers and remains stable over time but that "our current system fails on all these counts". The panel stated that "individuals and employers must navigate a confusing and ever-changing multitude of qualifications: currently over 13,000 are available to 16-18 year olds. Many of these qualifications hold little value in the eyes of individuals and are not understood or sought by employers, but too many people do not realise this until it is too late."

The Government accepted the Panel's recommendations and in July 2016 published a Post-16 Skills Plan setting out its vision for the reformed system. FE "Area Reviews" have been undertaken nationwide to examine the local issues, with Birmingham and Solihull being the first area to be reviewed. The Government expects the area reviews to "enable a transition towards fewer, larger, more resilient and efficient providers, and more effective collaboration across institution types."

The Birmingham and Solihull Area Review has found no evidence of service duplication. Seven colleges (three sixth-form colleges and four general further education colleges) participated in the Birmingham and Solihull review, of which one (South & City College Birmingham) has facilities located within the study area (Bordesley Green Campus). The Area Review found that Birmingham and Solihull's colleges "have distinct recruitment areas and there is little significant duplication in their offer." (19)

The Area Reviews made a series of recommendations. Alongside recommendations relating to the financial sustainability of provision, the Area Review stated that:

- Colleges should develop specialisms, particularly at levels 4 (which is equivalent to BTEC) and Level 5 (awarded after two years of full time study). Specialisms will provide learners and employers with improved access to training, and address skills gaps and skills shortages, including in LEP identified priority sector areas. In EBNS, relevant specialisms could be around meeting the needs of HS2 (aligning to Washwood Heath opportunities), engineering (aligning to JLR), and construction (given high levels of infrastructure spending in the pipeline).
- Colleges should grow apprenticeships, in particular through the commitments made by each of the four general FE colleges to establish an apprenticeships company to improve employer engagement and increase their market share.
- Colleges should co-operate on a plan for a new Institute of Technology. This investment now forming part of the Government's recently launched (Jan 2017) Industrial Strategy, has at its heart the objective of significantly increasing the number of apprenticeships available in the city. The Area Review also anticipated that this Institute would have a role in delivering the more sector-specialist approach discussed above.

Since the Area Review process closed, a partnership of four colleges and four universities has collaborated on plans for the Institute of Technology (IoT). The IoT will be a virtual organisation, rather than have a physical presence: the £170m IoT national budget will be shared across 10-12 applicants, and be shared across three years – suggesting that there is insufficient funding for a new campus, although this approach could change by the time the application submitted (DfE has 'spring 2017' as a deadline). Advanced robotics will be purchased as part of the scheme, although choices about which existing campus or campuses will get this equipment have yet to be made by the partnership. A full business case will be developed over summer 2017, with successful applications announced in autumn 2017. The new virtual institution will go live 1 Sept 2018, assuming that the application is successful.

Additionally, the National College for High Speed Rail is scheduled to open in 2018. It is located a few hundred metres of the western boundary of the study area. Its offer will include civil engineering and command, and control & communications.

Skills and labour market participation

Key issues:

- EBNS workers are less skilled than average
- Labour market participation effects vary by gender and ethnicity
- Long term and youth unemployment higher than average
- Evidence suggests that the combination of multiple actors, strategic overload and short term funding is unhelpful in getting solutions

Why is this issue important? A brief review of the literature and local context

In the section above on education, we showed evidence which suggested that there were current weaknesses in performance in this area.

Evidence collated in this section suggests that historical underperformance in education has fed through into skills levels for those of working age.

Underperformance in skills has far-reaching effects. Skills levels are likely to be critical to the short, medium and long term performance of the EBNS economy. There is evidence that improving skills attracts investment and growth: the skills of the workforce and technical expertise in a region are the most important drivers of knowledge-based industry business location choices (DfT, undated). In OECD countries a 1% increase in the number of graduates adds 1.1% to GDP growth (BIS, 2012).

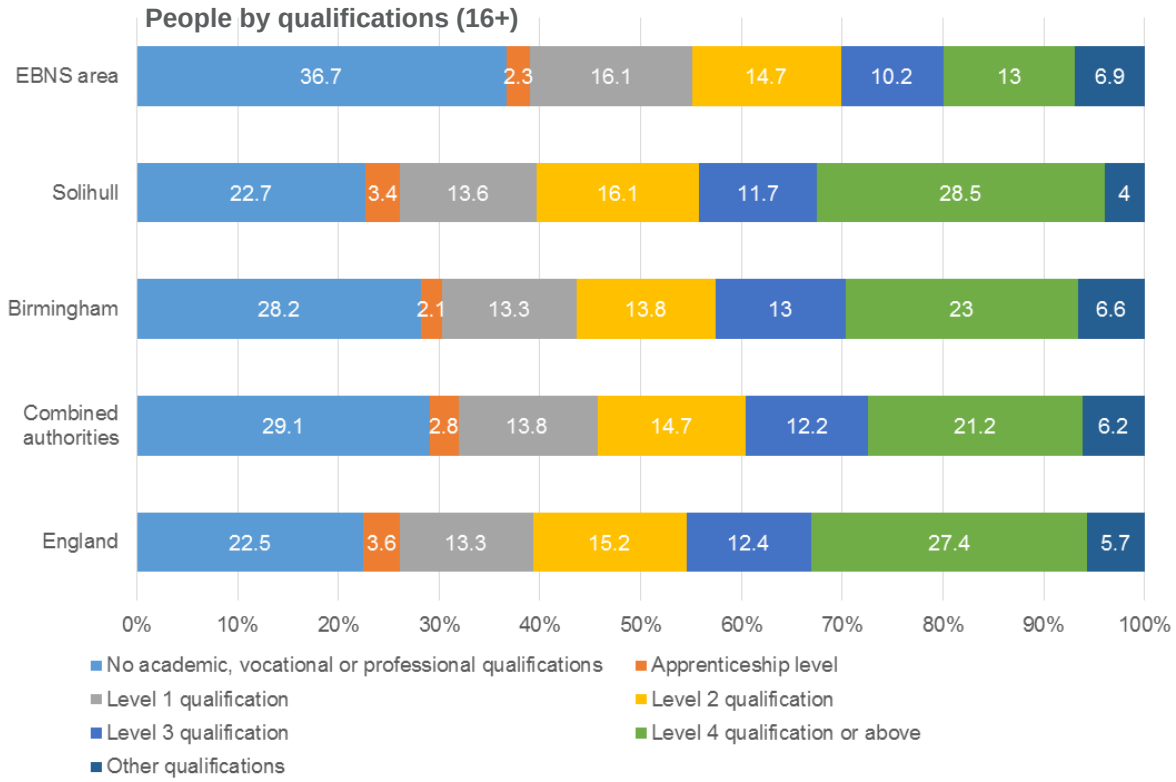
Skills are also an important determinant (some studies place it as *the* most important determinant) of employers' willingness to invest in a location. Improvements in skills levels would assist in attracting and retaining the high quality employers that will be central to its prosperity in future (DfT undated).

UK-wide, strong demand is projected for skilled workers, who need not be graduates: evidence shows that the UK faces a chronic shortage of people with technician-level skills. In engineering and technology alone, Engineering UK data shows an annual shortfall of 29,000 people with level 3 skills and a shortfall of 40,000 people with skills at level 4. Among 16-24 year olds, England and Northern Ireland together now rank in the bottom four OECD countries for literacy and numeracy – key prerequisites for access to intermediate and higher level skills training. By 2020, "the UK is set to fall to 28th out of 33 OECD countries in terms of developing intermediate skills, and the size of the post-secondary technical education sector in England is extremely small by international standards. This adversely affects our productivity, where we lag behind competitors like Germany and France by as much as 36 percentage points" (2016, Independent Panel on Technical Education).

A culture of lifelong learning will also be critical to create long term economic resilience. Over the longer-term, Andy Haldane (Bank of England Chief Economist) suggests that we may be on the cusp of a fourth industrial revolution. Automation of routine administrative, clerical and production tasks may affect major swathes of the labour market. 15 million jobs may be at risk within the UK. If these trends do materialise, workers in higher skilled jobs will tend to be insulated, as well as those within jobs that demand high levels of creativity, caring and emotional intelligence. A rapid response to economic change will require a high quality skills response.

Over a third of all EBNS residents have no qualifications – far exceeding the English average of 23%

This chart and table show the proportion of the study area and comparators by highest qualification achieved.
Well over a third of the EBNS area population – 36.7% - has no academic, vocational or professional qualifications. This is a far higher figure than for all comparator areas, particularly in relation to the national average of 22.5%. EBNS also has a higher proportion of people with qualifications at level 1 (equivalent of 1 GCSE pass).
Put together, the "no and low" qualification residents make up 53% of the population, compared to 36% in England as a whole.
By contrast the area has a lower proportion of people with level 3 (equivalent of 2+ A-levels) or degree qualifications than each of the compactor areas.



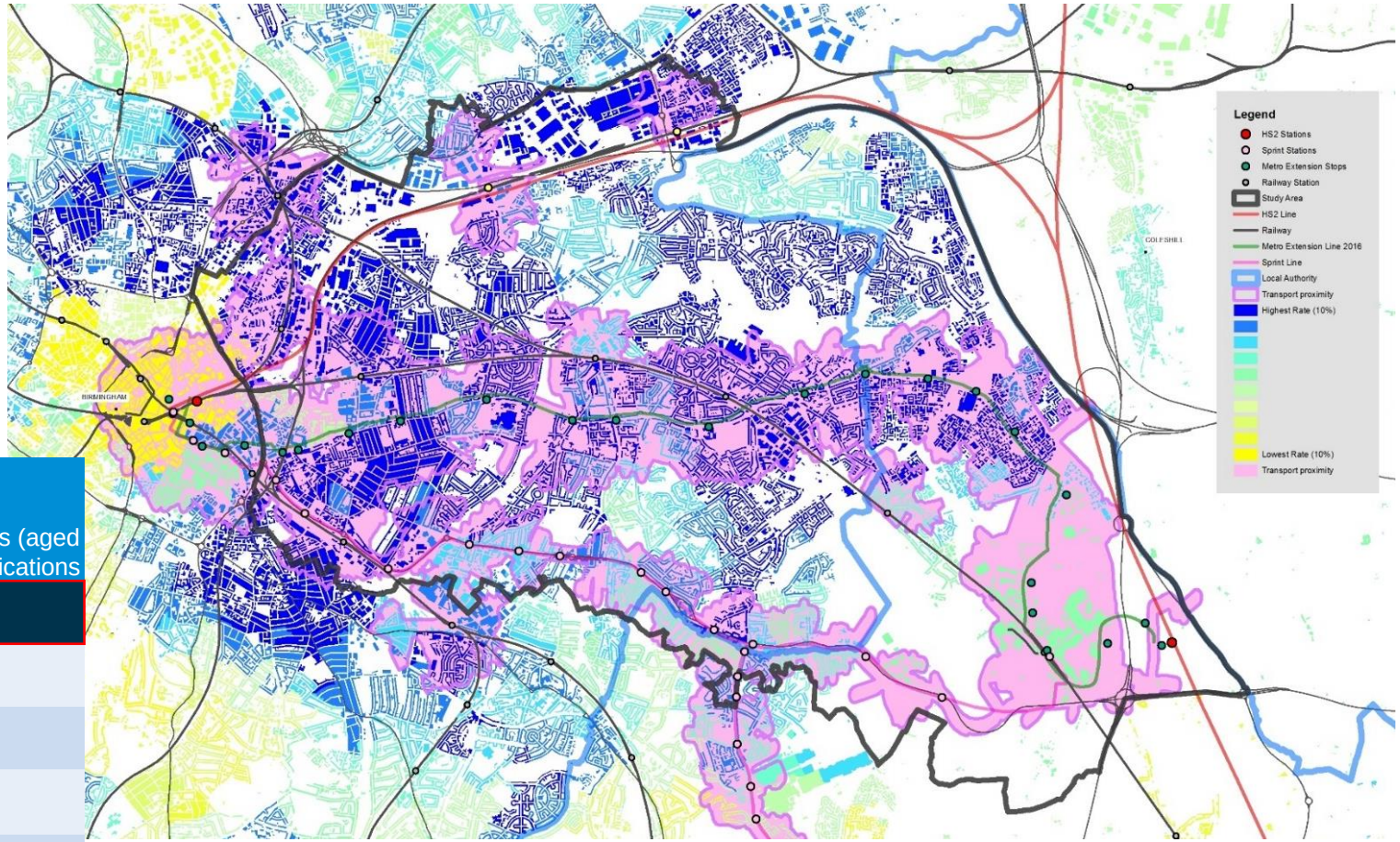
Dataset: *People by qualifications (16+)*
Date: *2011*
Source: *Census 2011*

	No academic, vocational or professional qualifications	Apprenticeship level	Level 1 qualification	Level 2 qualification	Level 3 qualification	Level 4 qualification or above	'Other qualifications'
EBNS area	36.7	2.3	16.1	14.7	10.2	13	6.9
Birmingham	28.2	2.1	13.3	13.8	13	23	6.6
Solihull	22.7	3.4	13.6	16.1	11.7	28.5	4
WMCA constit LAs	29.1	2.8	13.8	14.7	12.2	21.2	6.2
England	22.5	3.6	13.3	15.2	12.4	27.4	5.7

In terms of spatial distribution, a lack of qualifications is widespread across the EBNS area. Most areas are in the bottom 10% of LSOAs on this measure

Adults with no qualifications

As shown in the map, many adults with no qualifications in EBNS are within walktimes of new and improving transport infrastructure. There are pockets of more skilled people in the area (for example, in parts of Castle Bromwich, Hodge Hill and Sheldon). These areas tend to be more distant from upgraded PT facilities.



Area	Proportion of adults (aged 16+) with no qualifications
EBNS area	36.7%
Birmingham	28.2%
Solihull	22.7%
WMCA constit LAs	29.1%
England	22.5%

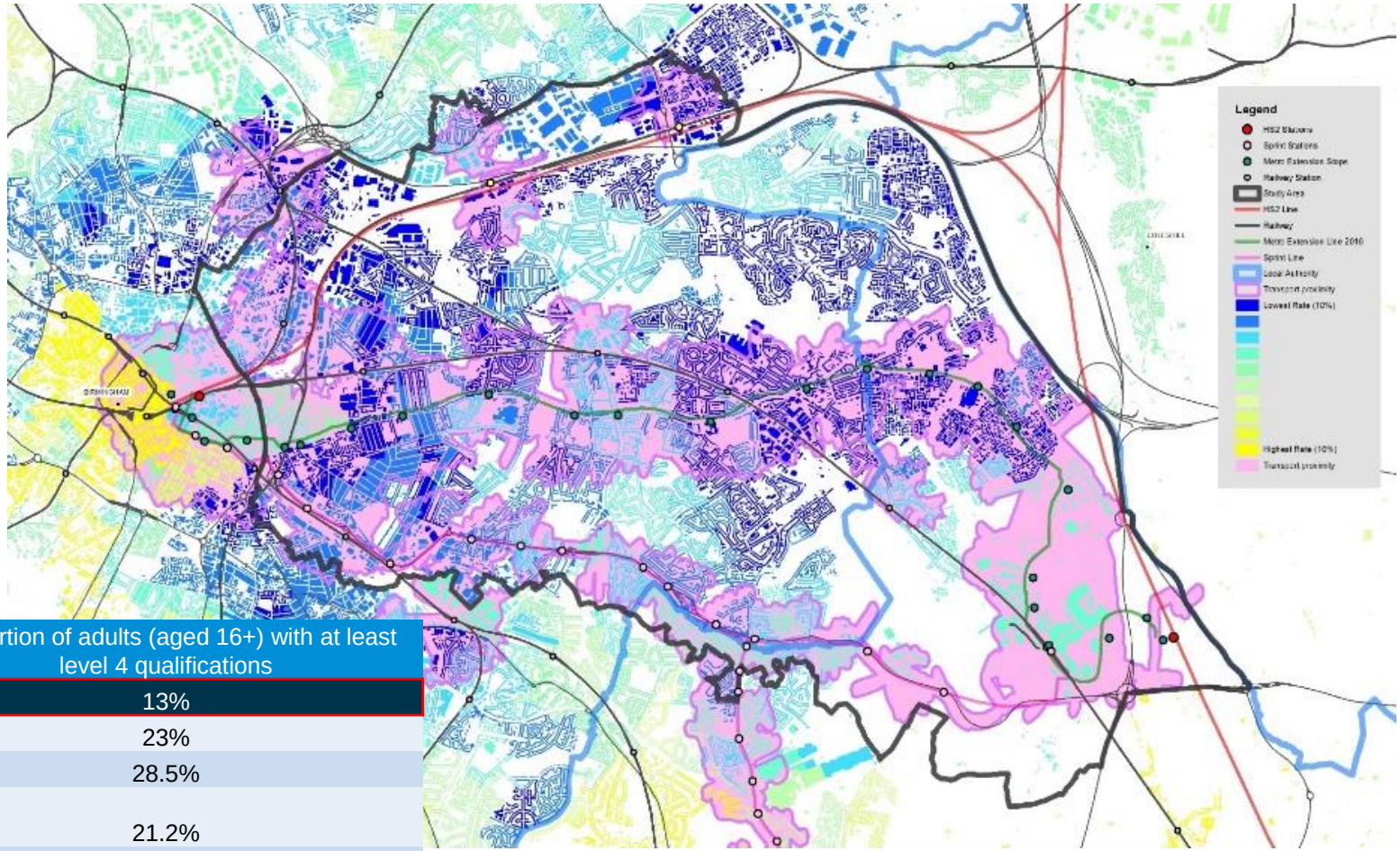
Dataset: *People with no qualifications. This data is derived from the Census 2011 self-reported questions on qualification levels*
Date: *2011*
Source: *Census 2011*

Historic educational underperformance in EBNS is likely to be one reason why EBNS has a relatively unskilled workforce. People in the EBNS area are half as likely to hold degree level qualifications as the national average

The chart and table show the significant deficiency of adults holding degree level qualifications in EBNS. As shown by the table below, EBNS falls well below comparators on this measure. The map shows that a significant proportion of areas are in the bottom 10% of LSOAs of this measure.

Dataset: *People with level 4/5 qualifications (degree level or higher). This data is derived from the Census 2011 self-reported questions on qualification levels*
Date: *2011*
Source: *Census 2011*

Adults with Level 4 qualifications

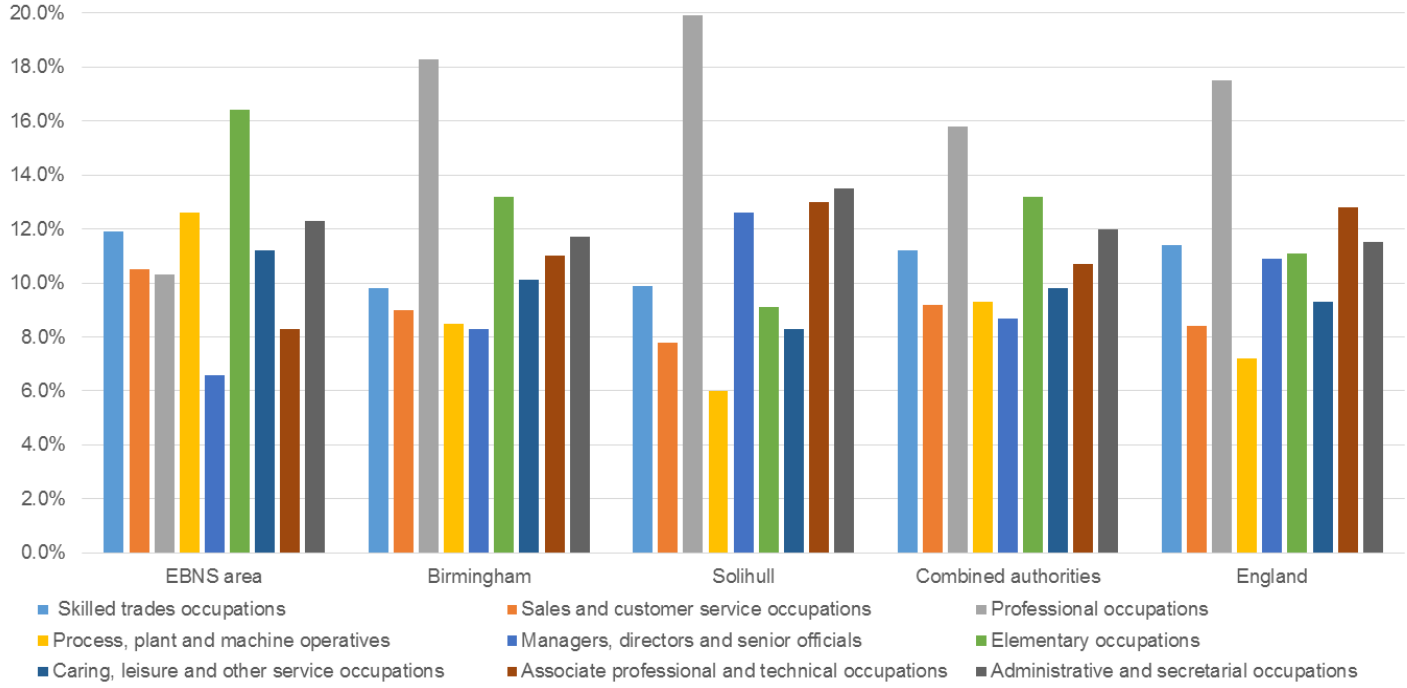


Area	Proportion of adults (aged 16+) with at least level 4 qualifications
EBNS area	13%
Birmingham	23%
Solihull	28.5%
Combined authorities	21.2%
England	27.4%

The lower skills of EBNS residents has also translated into the labour market occupational profile. EBNS residents are less likely to be in professional roles and more likely to be in elementary occupations than across comparator areas

The occupation profile mirrors the skills profile with a lower proportion of people living locally employed in occupations requiring higher qualifications (managerial, professional and technical) and a higher proportion in low skill occupations including process plant machine operatives and elementary occupations.

Dataset: *Shows the proportion of people in employment (aged 16-74) by occupation group. An individual's occupation group is determined by their response to the occupation questions in the 2011 Census.*
Date: *2011*
Source: *Census 2011*

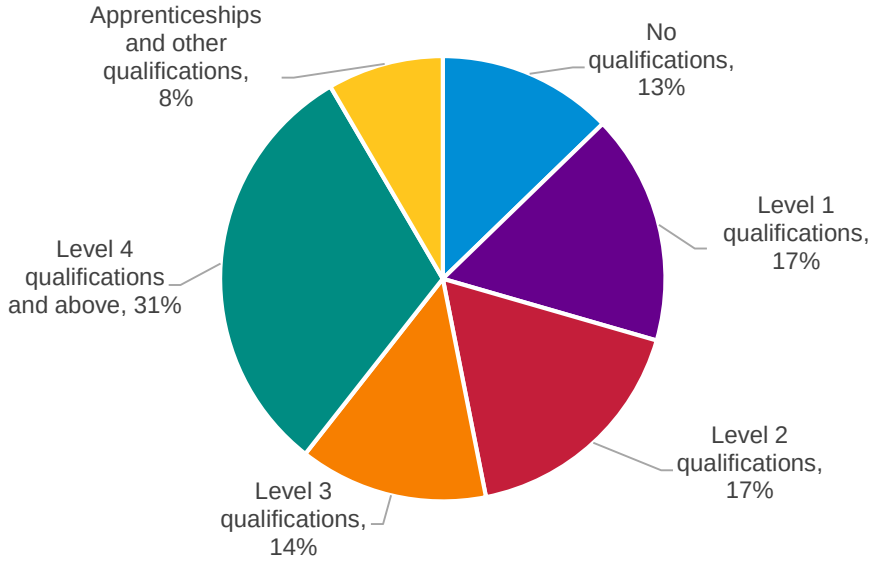


	Managers, directors & senior officials		Professional		Associate professional & technical		Administrative & secretarial		Skilled trades		Caring, leisure & other service		Sales & customer service		Process, plant & machine operatives		Elementary	
EBNS area	6.6%	6,762	10.3%	10,587	8.3%	8,499	12.3%	12,675	**11.9%**	12,221	**11.2%**	11,580	**10.5%**	10,759	**12.6%**	12,923	**16.4%**	16,930
Birmingham	8.3%	35,160	18.3%	77,424	11.0%	46,762	11.7%	49,752	9.8%	41,640	10.1%	42,626	9.0%	38,152	8.5%	36,206	13.2%	55,969
Solihull	**12.6%**	12,312	**19.9%**	19,446	**13.0%**	12,723	**13.5%**	13,260	9.9%	9,681	8.3%	8,093	7.8%	7,649	6.0%	5,895	9.1%	8,882
WMCA constit LAs	8.7%	99,522	15.8%	181,583	10.7%	123,152	12.0%	137,995	11.2%	128,567	9.8%	112,628	9.2%	105,009	9.3%	107,004	13.2%	150,914
England	10.9%	2,734,900	17.5%	4,400,375	12.8%	3,219,067	11.5%	2,883,230	11.4%	2,858,680	9.3%	2,348,650	8.4%	2,117,477	7.2%	1,808,024	11.1%	2,792,318

Economic impact work has been carried out as part of the UK Central Hub Growth and Infrastructure Plan, and provides an early indication of skills demands

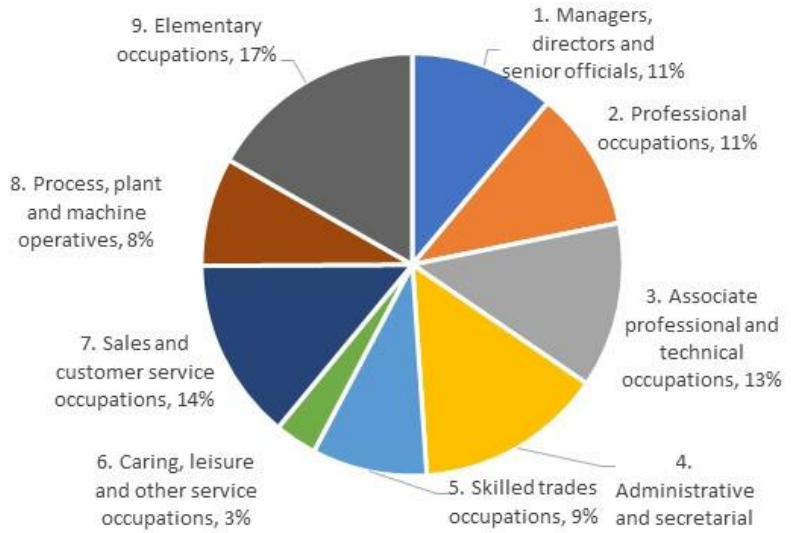
Further work is being carried out, so these projections come with significant caveats, but current projections suggest that the labour demand for gross jobs (ie, existing jobs plus new jobs) at UK Central sites will require skilled workers. The largest single skills category is Level 4 (degree level) and above, at 31% of gross jobs. Even so, there will be some demand for those with low and no qualifications: 30% of occupations will be open to those with no qualifications and level 1 qualifications.

Labour demand skills profile at the UK Central sites (% gross jobs)



Source: Amion for the UK Central Growth and Infrastructure Plan (2017)

Labour demand occupational profile at the UK Central sites (% gross jobs)



Source: Amion for the UK Central Growth and Infrastructure Plan (2017)

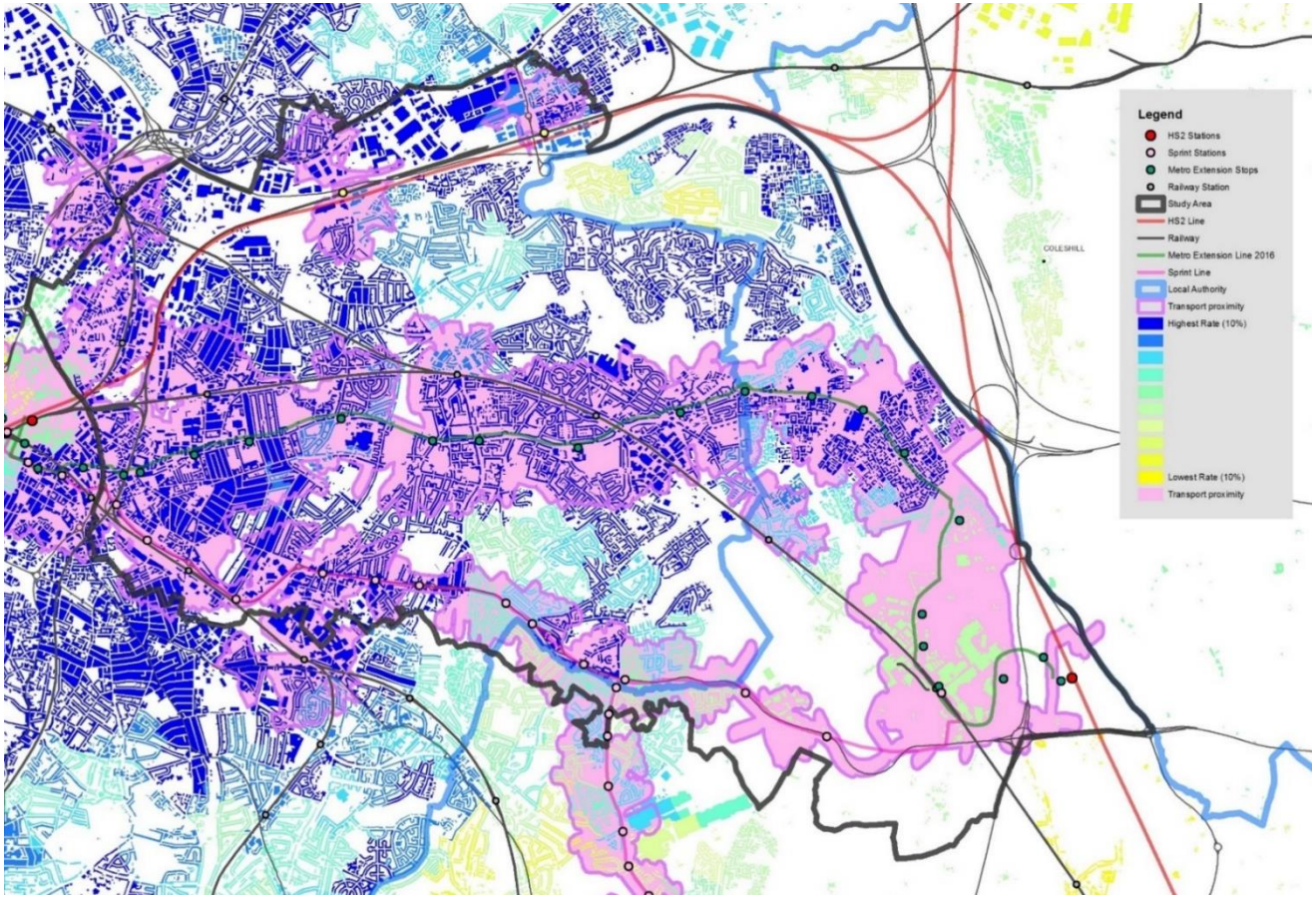
Unemployment is highest in the west of the EBNS area closer to inner city Birmingham

The map displays the rank of LSOAs in EBNS, based on the proportion of people claiming JSA and UC.

The table shows that Washwood Heath has 6% of people on JSA (Job Seekers Allowance) and UC (Universal Credit)- the highest in EBNS. In general relatively high levels of JSA & UC claimant rates are seen right across EBNS. The table shows that areas with lower levels of claimants are found in parts of Bickenhill and Castle Bromwich.

Area	JSA/Universal Credit claimants	
	N of claimants	% of claimants aged16-64 in each area
Acock's Green (B)	765	3.9
Hodge Hill (B)	715	4.2
Nechells (B)	1,284	5.0
Shard End (B)	825	5.3
Sheldon (B)	475	3.6
Small Heath (B)	1,141	5.0
Washwood Heath (B)	1,320	6.0
Yardley (B)	670	4.4
Bickenhill (S)	180	2.0
Castle Bromwich (S)	105	1.5
Chelmsley Wood (S)	390	5.9
Fordbridge (S)	285	5.5
Kingshurst (S)	190	3.9
Smith's Wood (S)	315	4.9
EBNS Total	8,660	4.8

Proportion of people (aged 16-64) claiming JSA or UC: ranked by LSOA



Dataset: *Proportion people aged 16-64 claiming Jobseekers Allowance or Universal Credit for out of work reasons*
Date: *December 2016*
Source: *Department for Work and Pensions (DWP)*

The EBNS area has had a consistently higher unemployment claimant rate than comparator areas over the last fifteen years

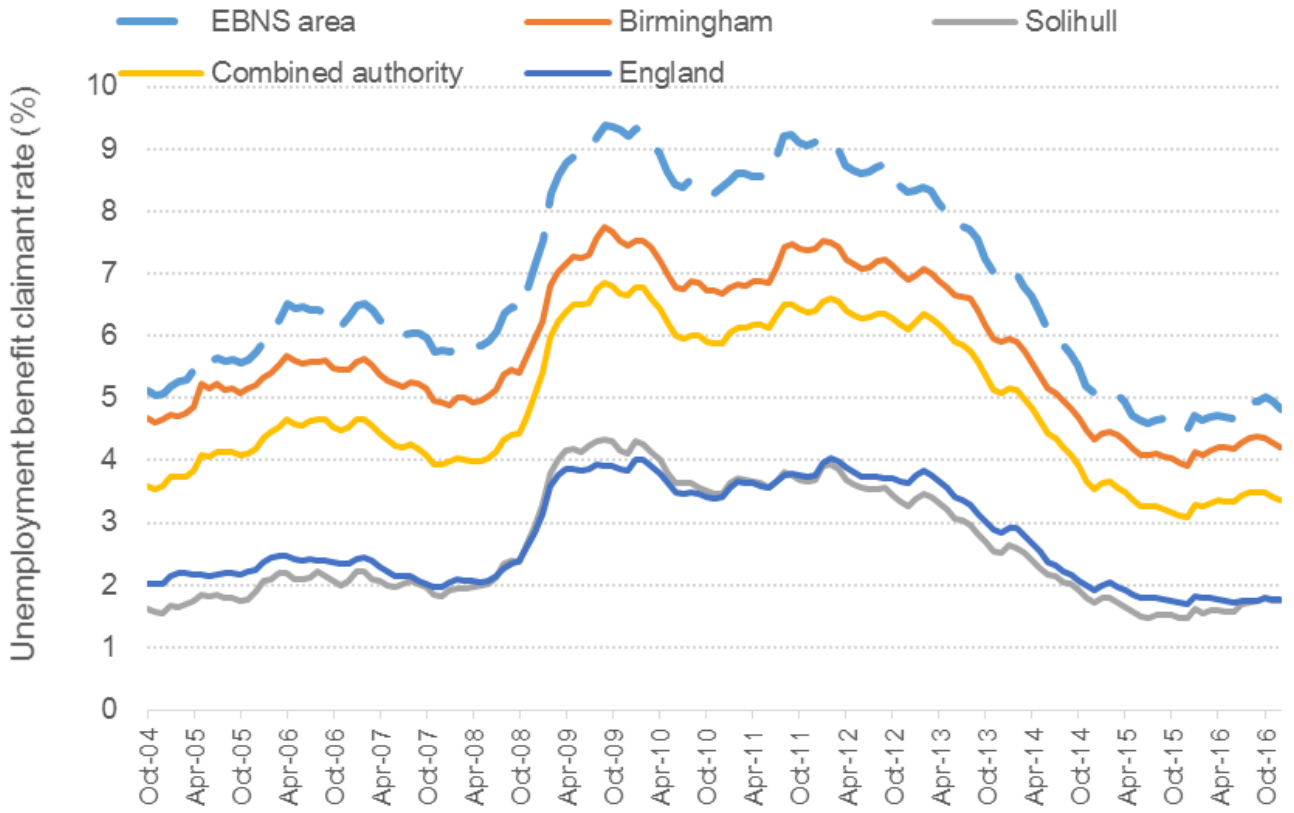
With regard to claimant count unemployment, the EBNS area shows a similar trend to the national and regional comparators with a sharp rise during the recession, followed by a steady fall from 2011. The rate has been broadly steady since late 2015.

Note that changes to unemployment claimant levels are affected by changes to benefit eligibility criteria and sanction policy as well as changes to labour market conditions. The unemployment benefits measure also does not capture all people who are unemployed as only captures those who are claiming benefits and who are not subject to benefit sanctions.

The International Labour Organisation (ILO) definition of unemployment gives a broader picture, but this data is not available at this spatial scale.

Area	JSA and Universal Credit claimants aged 16-64 (Dec-16)
EBNS study area	4.8%
Birmingham LA	4.2%
Solihull LA	1.8%
WMCA constit LAs	3.4%
England	1.8%

Proportion of people (aged 16-64) claiming JSA and UC: ranked by LSOA



Dataset: *Shows the proportion of people aged 16 – 64 claiming Jobseekers Allowance or Universal Credit for out of work reasons.*
Date: *December 2016*
Source: *Department for Work and Pensions (DWP)*

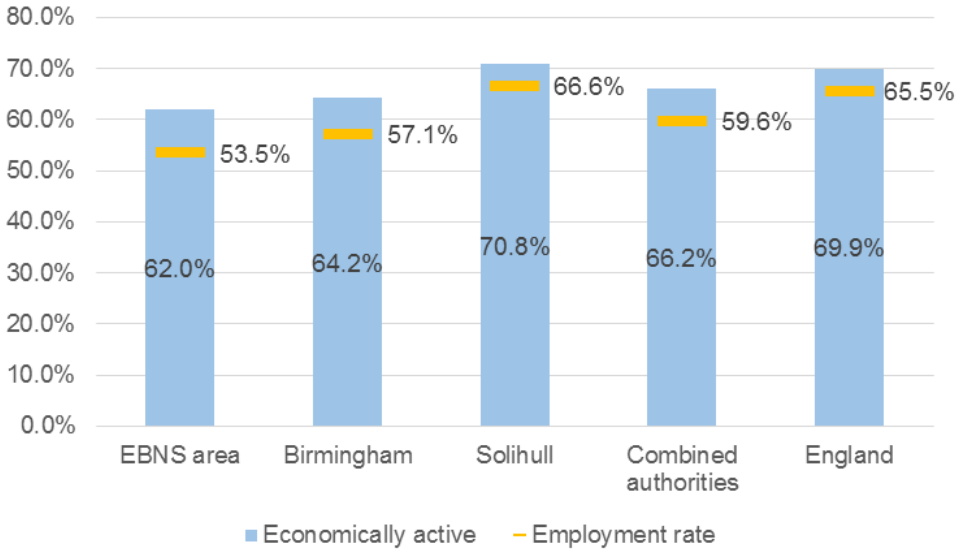
The EBNS area has a low employment rate relative to comparators, with just over half the population aged 16-74 in employment

Both economic activity and employment rates are shown in the table to the right.

- Economic activity rates are defined as those working full-time, part-time, the self-employed, full-time students (working) and those who are unemployed but looking for work.
- Employment rates show the percentage of the total working age population which is both economically active and in work.

The EBNS area has a lower total rate of economic activity than comparator areas, at just 62% of the population relative to a national average of 69.9%. Subtracting the unemployed from the economically active total gives us a basic employment rate for the EBNS area, which again is significantly lower than comparator areas. The employment rate for the EBNS area is just 53.5% relative to a national average of 65.5%.

Proportion of the economically active compared to the employment rate



	Total population (age 16-74)	Total economically active		Economically active: unemployed		Employment rate	
EBNS area	196,612	62.0%	121,904	8.5%	16,737	53.5%	105,167
Birmingham	760,252	64.2%	488,221	7.1%	54,114	57.1%	434,107
Solihull	148,360	70.8%	105,108	4.2%	6,304	66.6%	98,804
WMCA constit LAs	1,958,674	66.2%	1,296,464	6.5%	128,196	59.6%	1,168,268
England	38,881,374	69.9%	27,183,134	4.4%	1,702,847	65.6%	25,480,287

Dataset: *Economic activity data is based on self-reported responses to the 2011 census*
Date: *2011*
Source: *Census 2011*

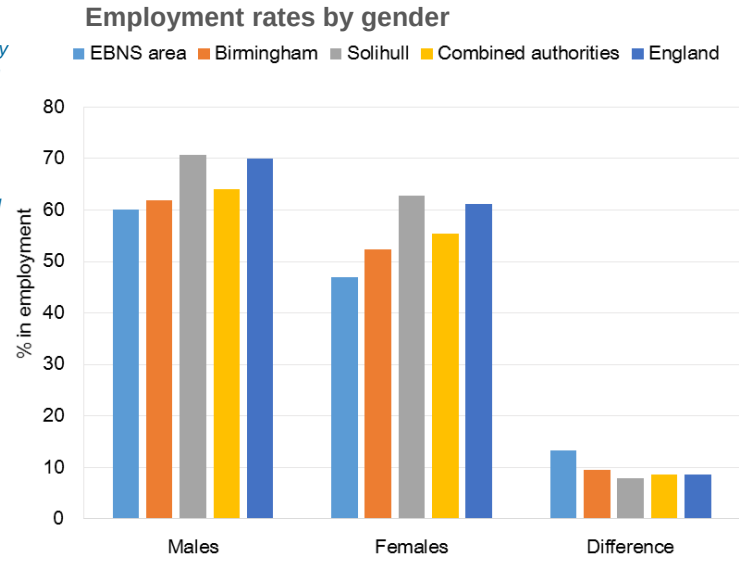
There are big differences in labour market participation by ethnicity and gender which are hidden by the average. Asian groups have the lowest rate of employment in EBNS, but the highest rate of all groups in Solihull

Employment rates are based on 2011 census data for all those aged 16 – 74. The older age group has been used to capture economic activity generated by an older aged working population.

The gender gap in overall employment rates is particularly wide across the EBNS area, with males, with a difference of 13.2 percentage points between the rates of men and women, relative to a national difference of 8.7 percentage points.

Employment rates by gender	EBNS area	Birmingham	Solihull	Combined authorities	England
Males	60.1%	61.9%	70.6%	64.0%	69.9%
Females	46.9%	52.4%	62.7%	55.4%	61.2%
Difference	13.2%	9.5%	7.9%	8.6%	8.7%

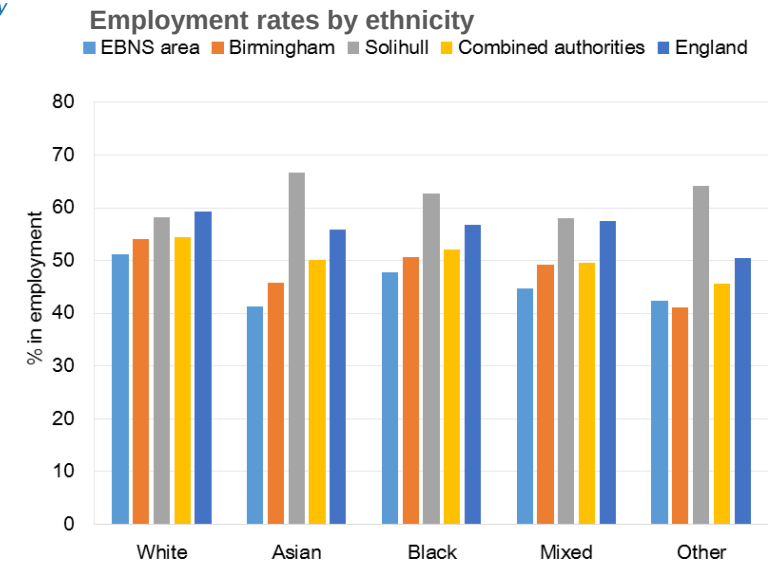
Dataset: *Employment by gender data is based on self-reported responses to the 2011 census and includes self-employed, full-time students those working full-time, part-time, the (working) aged 16 – 74.*
Date: *2011*
Source: *Census 2011*



There is some degree of ethnic variation in terms of average employment rates, with employment rates in EBNS lower for people of Asian ethnic groups than across other ethnic groups. **Employment rates for all ethnic groups are lower across the EBNS area than equivalent ethnic groups across England as a whole, but have noticeably strong performances in Solihull, where Asian, black and other ethnicities having higher rates than whites**.

Employment rates by ethnicity	EBNS area	Birmingham	Solihull	Combined authorities	England
White	51.2%	54.1%	58.2%	54.5%	59.3%
Asian	41.4%	45.7%	66.7%	50.1%	55.9%
Black	47.8%	50.7%	62.8%	52.1%	56.8%
Mixed	44.7%	49.1%	58.1%	49.6%	57.5%
Other	42.4%	41.1%	64.2%	45.6%	50.5%

Dataset: *Employment by ethnicity data is based on self-reported responses to the 2011 census and includes those working full-time, part-time, the self-employed, full-time students (working) aged 16 – 74.*
Date: *2011*
Source: *Census 2011*



Youth unemployment is more than double the national average across the EBNS area

The table to the right shows the % of people aged 16-24 claiming JSA/UC – so 5.1% of 18-24 year olds in EBNS claim JSA/UC. Within EBNS, this age group are more likely to be claiming JSA or UC than the comparator areas. The map shows that LSOAs within the west and centre of EBNS are within the worst performing 10%.There are stronger performing areas in parts of Castle Bromwich, Hodge Hill and Yardley.

However, it is worth noting that the data set is based on those claiming JSA and UC. It therefore does not take into account those who are unable to work for other reasons.

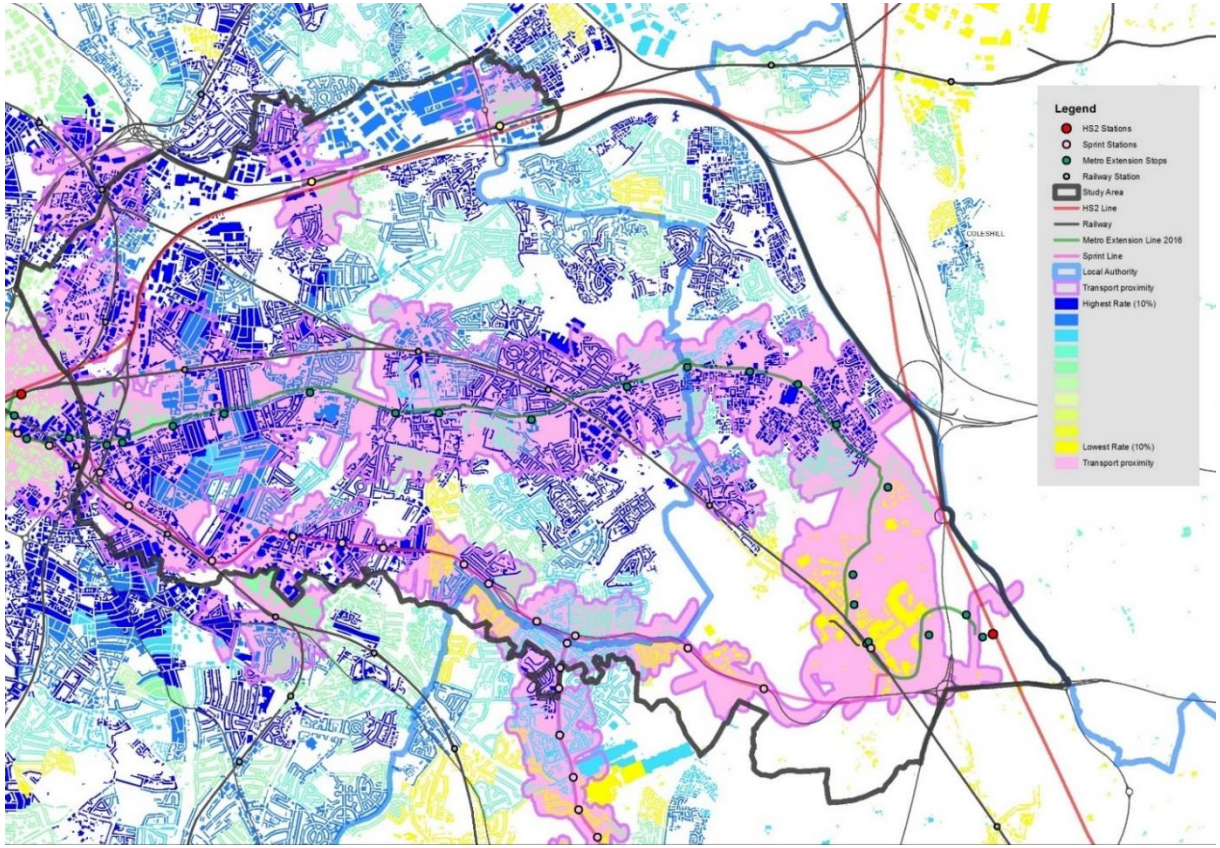
The table below shows that the Fordbridge area has the highest concentration of youth unemployment, followed by Smith's Wood and Chelmsley Wood.

Area	JSA/Universal Credit	
	No. of claimants	Claimants as % of all aged 16-64
Acock's Green (B)	150	4.1
Hodge Hill (B)	180	4.8
Nechells (B)	257	2.5
Shard End (B)	170	5.5
Sheldon (B)	105	4.3
Small Heath (B)	295	5.1
Washwood Heath (B)	315	5.8
Yardley (B)	155	4.8
Bickenhill (S)	50	3.5
Castle Bromwich (S)	35	2.9
Chelmsley Wood (S)	90	6.8
Fordbridge (S)	85	8.2
Kingshurst (S)	55	5.8
Smith's Wood (S)	90	6.9
EBNS Total	2,032	5.1

% of people aged 16-24 claiming benefits

Area	% of people aged 16-24 claiming JSA/Universal Credit	Area	% of people aged 16-24 claiming JSA/Universal Credit
EBNS study area	5.1%	Birmingham LA	3.8%
WMCA constit LAs	3.5%	Solihull LA	2.9%
England	2.1%		

Proportion of people aged 16-24 claiming benefits



Dataset: *Proportion people aged 18-24 claiming Jobseekers Allowance or Universal Credit for out of work reasons*
Date: *December 2016*
Source: *Department for Work and Pensions (DWP)*

At EBNS scale, NEET levels for 16-24 year olds are hard to track accurately. We have used data on NEETS aged 16-18 data as a proxy

The 2013 Birmingham Commission on Youth Unemployment dealt head-on with the complexities around the terms used to define youth unemployment, pointing out that 'a confusing range of terms are used in discussions on youth unemployment' (BCC, 2013, 13).

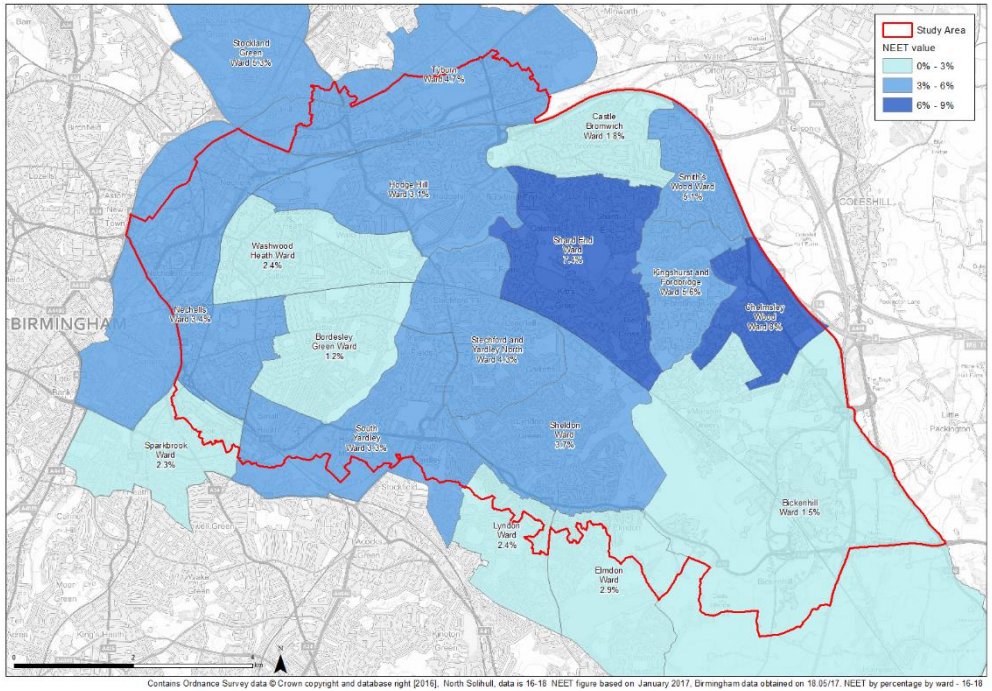
The term 'NEET' covers all young people Not in Employment, Education or Training. It seeks to identify those effectively dropping out of the labour market and becoming economically inactive. But not all unemployed 16-24 year-olds are NEET and not all people who are NEET are unemployed. Nationally, the Office for National Statistics states that around half, or 43%, of all young people in the UK who were NEET were looking for and available for work, and therefore classified as unemployed. (Guardian, 24 Nov 2016). The remainder were either not looking for work or not available for work and therefore classified as economically inactive. That category includes the long-term sick and those caring for children or other relatives.

The Commission stated that 'at local level, keeping track of the numbers in each case is difficult.' Local authorities track the number of 16- to- 18-year-olds who are NEET, but they do not track the number of young people over the age of 18 who are NEET. There are also wide seasonal variations, and there is a substantial group of 'not known' individuals, who may or may not be active in the labour market (either in the formal or informal market).

The map shown to the right looks at the local authority 16-18 NEET data only. It cannot be compared to national NEET data, which looks at the different age range of 16-24. Both the Solihull and Birmingham data is derived from the respective local authorities, and may be an under-estimate because it excludes the category of 'not known' where no data is available. These are a complex group: whilst some might be genuinely NEET, many could be working but chose not to inform LAs as it is not compulsory for them to do so. Others are difficult to contact because they do not want the LA to know their circumstances, whilst others have health problems. The Solihull 'not known' category is modest at 1.7%.

With those caveats, the data remains useful insofar as it identifies geographically where the major problems are located.

Proportion of those age 16-18 who are NEETs by ward in EBNS (number shown excludes those classified as Not Known; January 2017)



Dataset: *Proportion of NEETs as a percentage of the ward population aged 16-18 (EET: engaged in education, employment and training)*

Date: *2017*

Source: *BCC and SMBC*

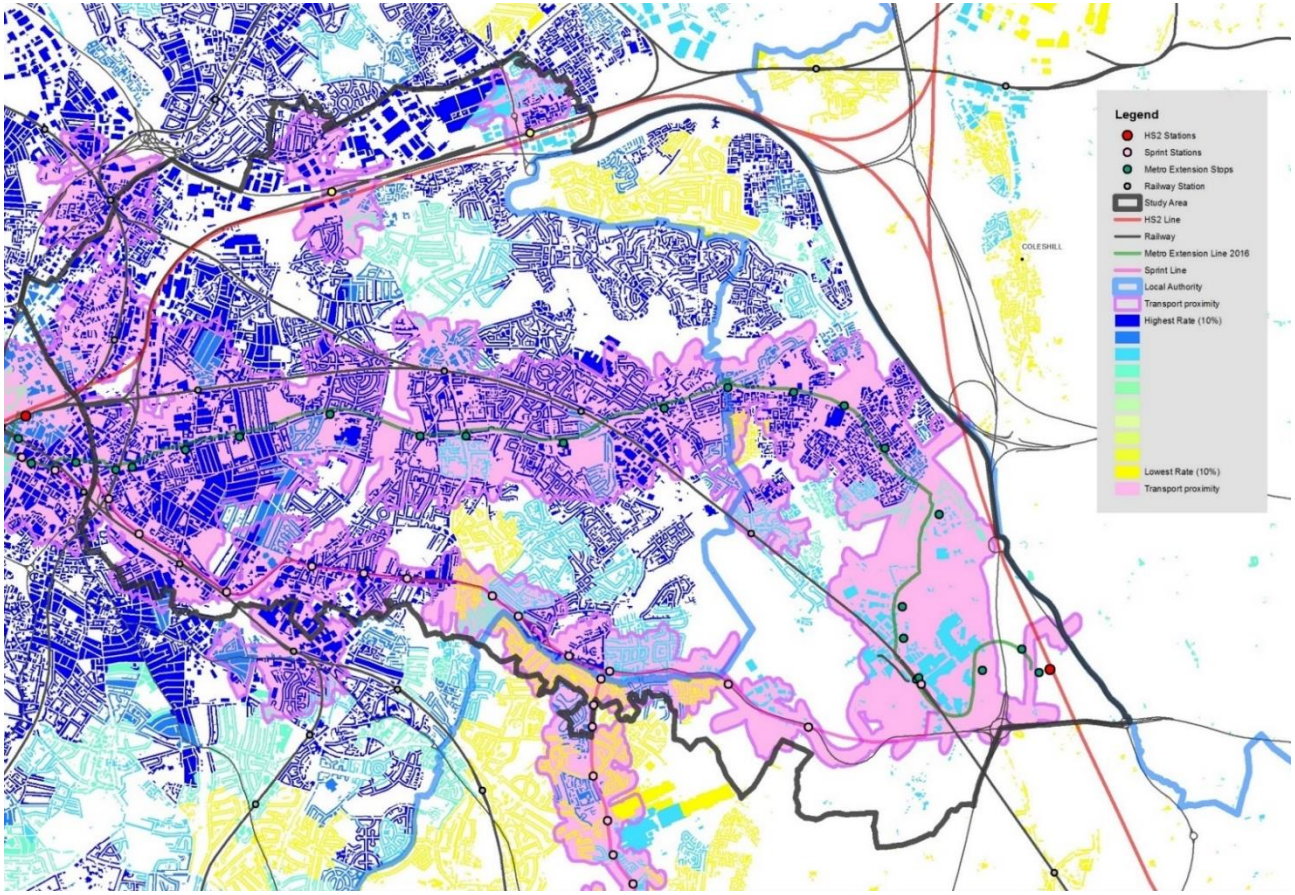
Long-term unemployment is also widespread, with most of the area in the worst performing 10% of English LSOAs

The map shows that within EBNS the LSOAs within the worst performing 10% are clustered at the west and centre of the area. The table below shows that Washwood Heath has the most significant proportion of people claiming benefits for over 12 months. All other areas experience much lower levels of long term unemployment.

Castle Bromwich is once again the area with the lowest levels of unemployment – which may be due, in part, to the demographic profile of the area, which sees a higher concentration of old people than the rest of EBNS.

Area	People aged 16-64 claiming benefits for over 12 months	
	No. of claimants	% of claimants aged 18-24 in each area
Acock's Green (B)	220	1.1
Hodge Hill (B)	195	1.2
Nechells (B)	345	1.3
Shard End (B)	285	1.8
Sheldon (B)	140	1.0
Small Heath (B)	325	1.4
Washwood Heath (B)	480	2.2
Yardley (B)	205	1.3
Bickenhill (S)	50	0.6
Castle Bromwich (S)	15	0.2
Chelmsley Wood (S)	100	1.5
Fordbridge (S)	50	1.0
Kingshurst (S)	50	1.0
Smith's Wood (S)	80	1.2

Proportion of people aged 16-64 claiming benefits for over 12 months



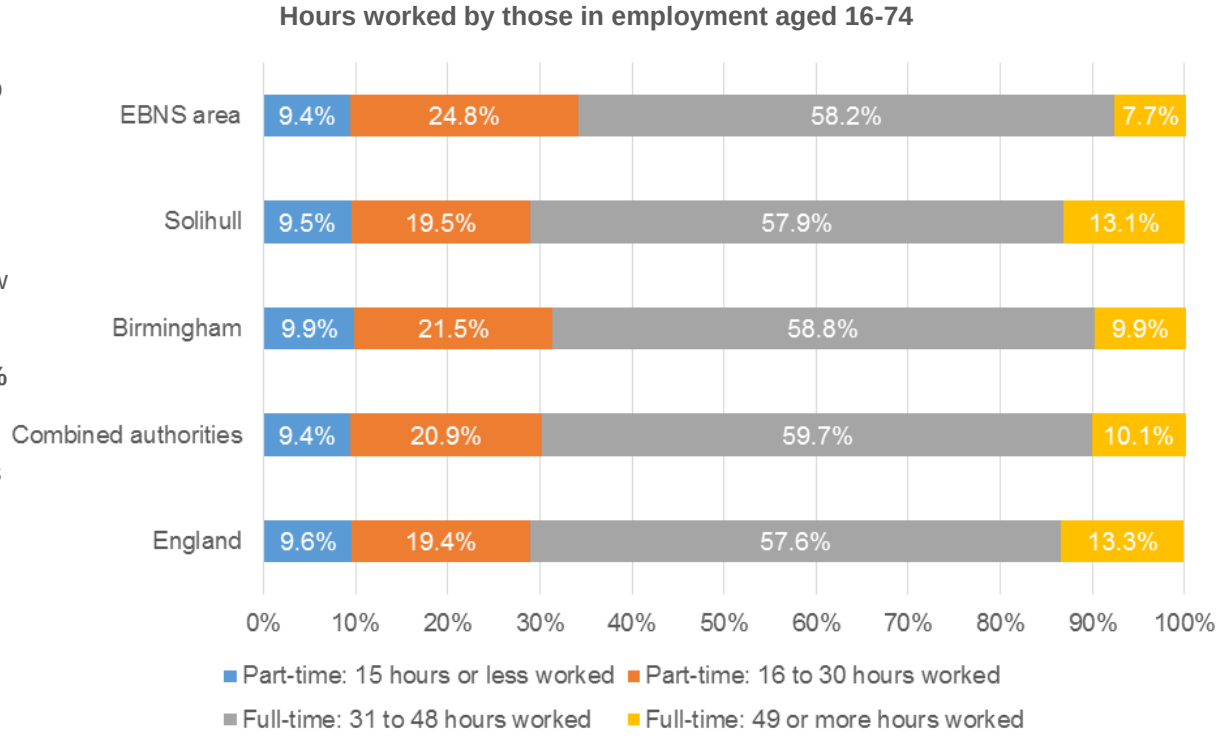
Dataset: *Proportion of people claiming Jobseekers Allowance for over 12 months*
Date: *December 2016*
Source: *Department for Work and Pensions (DWP)*

Note on data: *Please note that Universal Credit claimants are not included in these counts as figures are not yet published on the number of Universal Credit claimants claiming for more than 12 months*

Under-employment also appears to be a problem. EBNS residents who are in employment are 25% more likely to be working part time than the national average

People who live in the EBNS area and have a job are more likely to work part time than those in comparator areas. In all, over a third of the EBNS population in employment (34.2%) work part-time, compared with a national average of 29%. Full-time employment is likely to be better paid than part-time employment indicating a greater risk of people in low income occupations.

By contrast there is a notably small population working 49 hours or longer per week at just 7.7% compared to the national average of 13.3%. This likely reflects the occupation mix of the area, for example a lack of professional and managerial roles which are more likely to involve long working hours.



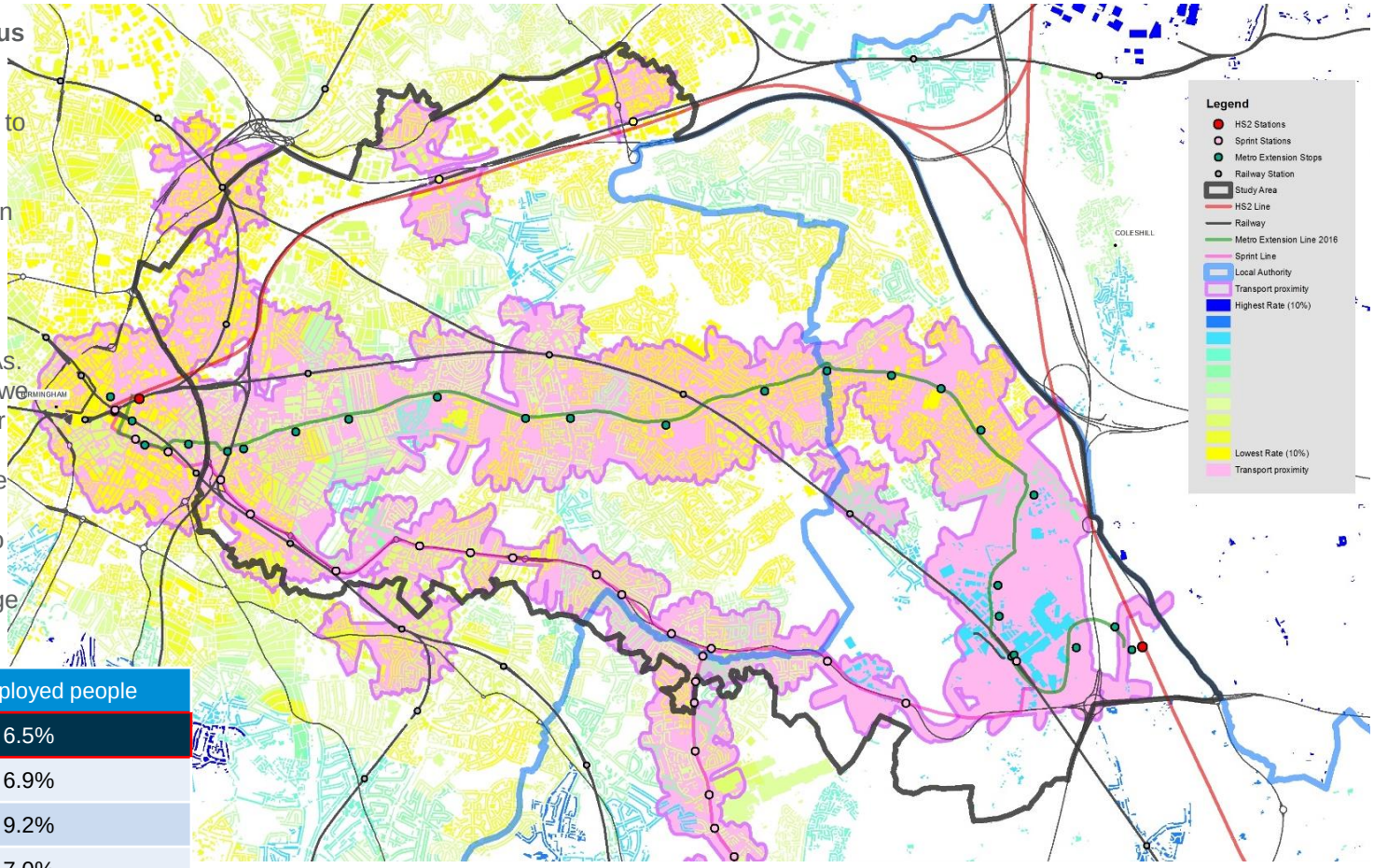
Dataset: *Data is based on self-reported responses to the 2011 census questions on hours worked question asked to all those in employment aged 16-74*
Date: *2011*
Source: *Census 2011*

Weekly hours, as % of all working people	Part-time: 15 hours or less worked		Part-time: 16 to 30 hours worked		Full-time: 31 to 48 hours worked		Full-time: 49 or more hours worked	
EBNS area	9.4%	9,632	24.8%	25,478	58.2%	59,899	7.7%	7,927
Birmingham	9.9%	41,824	21.5%	90,924	58.8%	249,030	9.9%	41,913
Solihull	9.5%	9,338	19.5%	19,110	57.9%	56,677	13.1%	12,816
WMCA constit LAs	9.4%	107,222	20.9%	239,339	59.7%	684,565	10.1%	115,248
England	9.6%	2,418,518	19.4%	4,888,565	57.6%	14,502,713	13.3%	3,352,925

Some places have responded to weak labour markets with higher levels of ‘defensive’ self employment. That has not happened in EBNS: self-employment is lower in the EBNS area than the England average

The figures in the map and table are based on responses to the 2011 Census economic activity questions. The distinction between employee and self-employed is determined by the response to the question "Do (did) you work as an employee or are (were) you self-employed?" It relates to the person's main job in the week before Census or, if not working in the week before Census, their last main job. EBNS has a substantially lower proportion of self-employed people when compared with England and the LAs. One issue to understand, though, is that we have needed to use Census data in order to use mapping at this spatial scale The Census was taken in 2011, and this issue has been quite fast moving as in recent years, some employers have preferred to register employees as self employed. As datasets are updated, we may see change in this issue.

Proportion of people aged 16-74 who are self-employed



Area	Self-employed people
EBNS study area	6.5%
Birmingham LA	6.9%
Solihull LA	9.2%
WMCA constit LAs	7.0%
England	9.8%

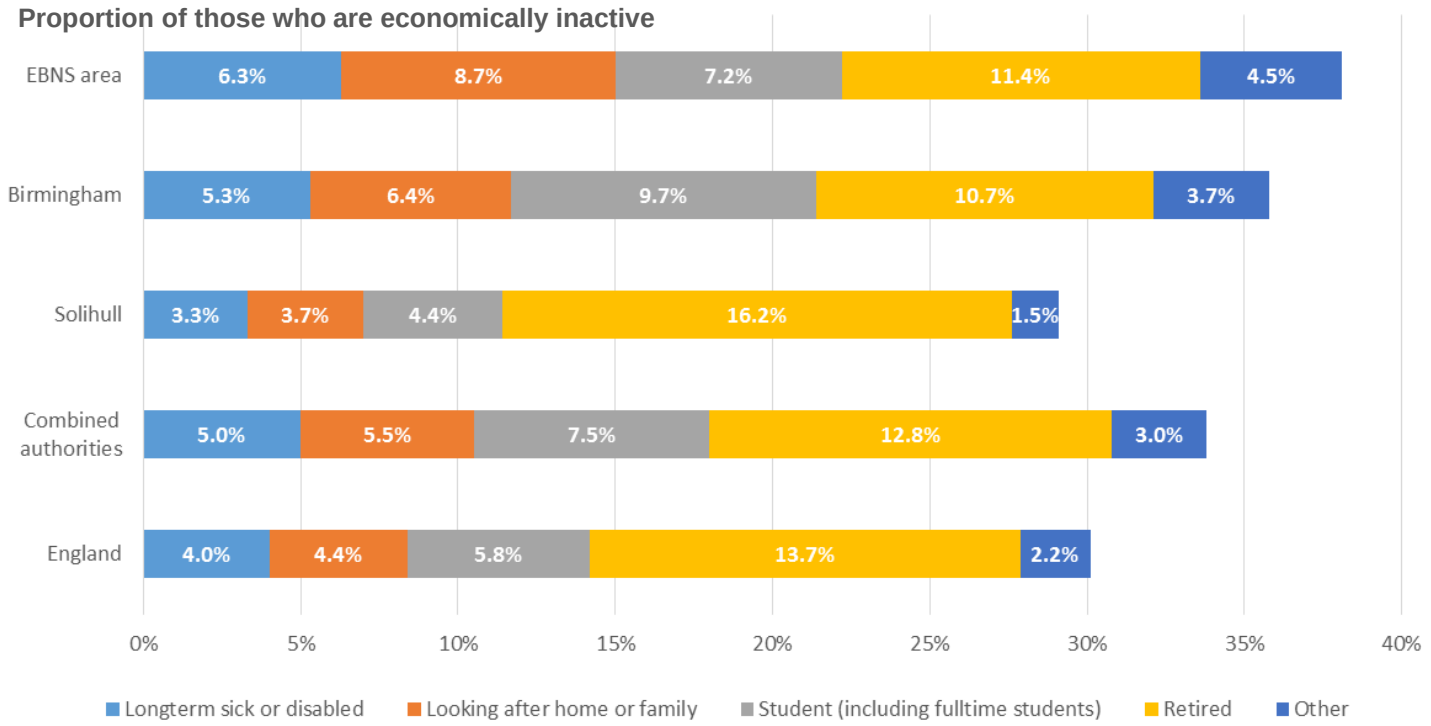
Dataset: *Shows the proportion of adults aged 16-74 who are in self-employed.*
Date: *2011*
Source: *Census 2011*

We looked at the reasons why people in EBNS have a higher level of economic inactivity. People in the EBNS area are more than twice as likely to be out of work due to home and family commitments than the national average, and over 50% more likely to be long term sick or disabled

With the exception of those that have retired, the largest economically inactive group in the EBNS area are people who are looking after home or family, as 8.7% of the labour force are out of work due to this. This is likely to reflect the age profile of the area (with more children than the national average) and is likely to drive the relatively low employment rates among women.

When compared to England and the individual authorities, EBNS also has the highest proportion of people out of work due to long-term sickness or disability.

Dataset: *Economic inactivity data is based on self-reported responses to the 2011 census, of those aged 16-74*
Date: *2011*
Source: *Census 2011*



Economically inactive	Total economically inactive		Long-term sick or disabled		Looking after home or family		Student (including fulltime students)		Retired		Other	
EBNS area	38.0%	74,708	6.3%	12,338	8.7%	17,089	7.2%	14,129	11.4%	22,362	4.5%	8,790
Birmingham	35.8%	272,031	5.3%	39,917	6.4%	48,771	9.7%	74,102	10.7%	81,213	3.7%	28,028
Solihull	29.2%	43,252	3.3%	4,949	3.7%	5,506	4.4%	6,496	16.2%	24,019	1.5%	2,282
West Midland LAs	33.8%	662,210	5.0%	97,831	5.5%	108,239	7.5%	146,761	12.8%	250,851	3.0%	58,528
England	30.1%	11,698,240	4.0%	1,574,134	4.4%	1,695,134	5.8%	2,255,831	13.7%	5,320,691	2.2%	852,450

Strategies are in place to raise skills. This is a complex and crowded field

At GBSLEP level, the Skills for Growth Plan was published in June 2013. It sets out 46 actions – some of which will now have been delivered - across five key themes to be delivered over a five year period. The key themes are:

- inspired leadership by utilising the Employment and Skills Board (ESB)
- Creating a dynamic partnership between business and skills providers
- Creating a demand orientated local skills system by identifying and articulating local business needs and targeting activity on the area's key growth sectors
- Increasing aspiration and opportunity amongst young people and adults by linking pupils and learners with real-world work opportunities
- Supporting a thriving FE and HE ecosystem by working with the area's Further and Higher Education providers to support a world-leading reputation for educational excellence, and to develop an environment where students and graduates will want to study, live and work.

At Birmingham level, the Birmingham Skills Investment Plan (2016-26) lists 19 deliverables under 5 themes – representing a large and complex agenda which might need further prioritisation. The document was not intended to look at specific sub-areas within the city, so the precise response needed to deal with issues in EBNS is not apparent from the document, and, generally speaking, the document does not attach roles and responsibilities for delivery of its objectives to different institutions. However, the document makes the point that *"one of the consistent messages from employers, their representatives and wider stakeholders is that the skills landscape in the city remains too complex, opaque and difficult to navigate. People are confused by the array of organisations and messages they receive. The myriad of initiatives and organisations involved in supporting the functioning of the labour market needs to be simplified and better coordinated."*

Further action planning on operationalising and prioritising this strategy is taking place elsewhere. The strategy states that it is BCC's role to improve "the strategic leadership for skills and training in the city, combining employers, the council and providers developing a common and shared analysis of the challenges, priorities, and actions ensuring the needs of the city are reflected in the policies of the new Combined Authority and the Local Enterprise Partnership". We understand that the refreshed Birmingham Employment and Skills Board will take this function.

The Combined Authority is also sponsoring a joint programme on skills development under the themes of

- Ignite: covering themes such as careers information guidance, and workplace-based activity with clients including creating clear 'lines of sight' to the workplace.
- Accelerate: Building on the skills of people in work to develop higher level skills
- Retune: Develop skills of those who are unemployed or underemployed or in employment where demand is decreasing

On behalf of the CA, the West Midlands Productivity and Skills Commission is currently very active. Looking at the issues right across the sub-region, the Commission has the following objectives.

- To gather evidence and understand the full extent of the productivity and skills challenge across the three LEP geography of the West Midlands,
- To understand the component causes of the productivity and skills challenge and the inter-relationships between them, including where differences exist between key sectors and industries
- To make recommendations as to how these causes can be addressed at pace, taking a whole system approach,
- To provide guidance and recommendations on the implementation of plans to be approved by the Combined Authority Board,
- To propose monitoring systems to review the effectiveness of the work,
- To ensure that skills needs are future proofed, forward looking and cognisant of technology changes.

A launch of the Commission took place in April 2017. At the time of writing, a call for evidence is underway, which has the objective of setting out a way forward that will bring "lasting and meaningful change". Future strategy work for EBNS could usefully take account of the Commission's findings.

The Department for Work and Pensions (DWP) has an important role in commissioning support for getting people into work. That provision is run through a number of routes

DWP's labour market access programmes aim to increase employment by upskilling job-seekers. This support is delivering skills through a number of mechanisms, as follows.

- **Adult Skills Budget funded through Skills Funding Agency**. This is colleges' mainstream funding, but a portion is allocated to 19+ age groups, and those on unemployment benefits. This is the main funding stream for provision to DWP clients. DWP does not contribute budget directly, but can support access by supporting travel expenses, work clothing, books and course materials to assist to access. These providers do not work to specific geographic areas, meaning that there is no data collected on the level of spend available through these budgets to clients resident within the EBNS area (or, indeed, any other area). DWP state that attempts are made to commission services and geographically target services, so that clients do not have to travel far, but accept that provision can be patchy.
- **Intermediate level provision** is funded through the local authority (with Birmingham Adult Education Service acting as a college but using SFA funding) lottery funding, community budget funding, and charitable organisations. For JSA claimants, this provision acts as a supplement to SFA funded provision, and Job Centres Plus staff are able to signpost clients to these services. No DWP contract is in place for these services, and so DWP have no control over quality levels, instead relying on feedback from Work Coaches and attendees about quality. No DWP resource in in place to evaluate quality of this provision.
- **DWP Flexible Support Fund** –Evaluation of CSP found that "discretionary funding can play an important role in helping partnerships to provide services to address local needs". This is a flexible budget which District Managers can use to fund local gaps in provision. (In this case, the DWP 'district' covers Birmingham and Solihull). Budgets are not yet set for this financial year, but last year the Flexible Support Fund had roughly £1m budget, which could be expanded to £2-3m over coming year across the District. Funding is allowed following a process of understanding local needs in individual job centres. ESOL has attracted significant funding in the past. There is existing Skills Funding Agency supported ESOL provision run through South and City College provision (Bordesley Green campus in EBNS). This is for provision around "Entry Level 2" English levels – for 26 weeks. For people who haven't gone up a level within 26 weeks, DWP is investigating providing ESOL job clubs where jobs are sought which do not require English proficiency. DWP is also looking to commission a course for people with mild to moderate mental health issues, and a history of drug and alcohol misuse.

DWP provision has an important interaction with the benefits system. DWP provision is undergoing significant structural change. The Work Programme – delivered nationally for the last five to six years - finishes on 31 March 2017. From the end of March, DWP will be changing: customers will stay with DWP for 2 years, and, if still unemployed, transfer onto the Work and Health Programme. The bulk – roughly 80% - of Work and Health Programme provision is aimed at dealing with health and disability issues, and is currently being contracted. Funding is limited for long term unemployed clients without health or disability problems at around 20% of the budget. This decision has apparently been taken for financial reasons, with ESA payments being higher than JSA, and ESA clients absorbing additional health-related spend. There will be other programmes coming on to deal with LT unemployed, direct through DWP.

Universal Credit reforms are close to being implemented. By the end of 2016, DWP will have completed a full roll out of UC.

Birmingham City Council also has a role in employment and skills provision. BCC is running provision aligned to DWP provision, which is intended to plug gaps, and targets particular key local issues

Birmingham City Council has an important role through the delivery of the Youth Employment Initiative (YEI) project in Birmingham and Solihull - Youth Promise Plus (YPP). Birmingham City Council are the accountable body for YPP. DWP are the Managing Authority for all ESF in the UK, including YEI. This provision is aligned to mainstream DWP/SFA provision, projects like Talent Match and incorporates the Destination Work project and provides intensive personalised support for NEET young people aged 15-29.

NEET individuals have an intervention worker who work in conjunction with work coaches in Job Centres and through more informal environments such as community centres. Intervention workers get smaller caseloads than the typical 300 clients managed by Job Centres Plus caseworkers, and are therefore able to provide higher levels of support. Other elements of the YEI include working around careers - Birmingham Careers Service are an internal delivery partner for Youth Promise Plus.

A large amount of money needs to be spent very rapidly under this programme (£50m revenue by July 2018). This is contracted into the North, South, East, West Birmingham and Solihull areas plus specialised contracts for young people with particular barriers – such as disability and mental health issues, those at risk of offending and homeless. Localities provision is delivered in quadrants of the City plus Solihull and is not congruent with the EBNS area. Delivery is based on original needs assessment, but estimates from BCC staff are that of the £50.4m for YPP, East Birmingham will get around 29%, or £14.6m, of the available funding. (For these purposes, East Birmingham is defined by the constituency boundaries of Hodge Hill, Hall Green and Yardley). 11% will go to Solihull. From East Birmingham, the target is that 4,870 people will receive support.

One of the generic problems in service provision – across all service providers - is the stop/start nature of funding, making the creation of a long-term, high quality employability service difficult to achieve. Current funding-focused provision is hard to deliver in a consistent and efficient way, with time being taken in project set up and shut-down, and relatively little time spent in consistent service delivery to end users.

What does the evidence suggest is needed to reduce unemployment and improve skills? 1) Evidence around pro-work social norms

There is no question that problems around un- and under-employment in EBNS appear quite intractable. Successive rounds of regeneration funding and skills provision have not been successful in driving unemployment rates down to levels equal to the sub-regional or national average rate.

We explored some of the possible solutions with officers. Whilst not a package of statistics, this nonetheless provides a useful evidence base on how progress could be made.

Evidence from provider interviewees we have worked with in the course of this study suggests that some clients are unwilling to undertake the disruption of giving up benefits in exchange for a short –term and possibly insecure job, and so can become habituated to a culture of worklessness. DWP staff have suggested that jobcentre delivery and allied programmes to reduce long-term unemployed have not had the degree of impact on the pattern of unemployment and worklessness as might have been hoped. For example, after two years on the DWP funded Work Programme, 62% of people in Birmingham and Solihull are still not in work (although this is a slightly better performance that the national statistic performance of 65%).

Although it is hard to point to evidence on social norms and values, we have repeatedly heard evidence that, in some places, we need to create and reinforce an intergenerational culture of aspiration and being in work. This evidence from EBNS is supported by peer-reviewed evidence from elsewhere, which supports the suggestion that micro-cultures within peer groups and small geographical areas can affect behaviour. Dasgupta and Putnam have pointed out that social networks can prevent markets from functioning properly, and as a result can hold people back. For example, research has shown that unemployed people tend to have segregated social networks – unemployed men in particular tend to mix primarily with other unemployed men. Equally, though, this research does show how valuable social networks can be when put to good use: research shows that local labour markets are defined for low-wage workers by word-of-mouth recruitment. It is argued that the job-finding process is a social one.

Programmes have been target on these issues in the past. Between 2014 and March 2017, in specific jobcentres in Birmingham and Solihull (including Washwood Heath, Erdington, Solihull and Chelmsley Wood Jobcentres) "Destination Work", a personalised coach mentor programme for 16-24 year olds, has also existed. This was commissioned through Birmingham City Council and funded through central government Cabinet office via a repackaging of Youth Contract resources. The personal support model adopted within this approach has had a positive effect for many individuals with a total of 2,433 young people being engaged and supported across the area of whom 888 have progressed into paid employment. However, even here there have been limits on impact with higher than expected drop out and non-engagement rates between DWP referrals and actual entry to the programme, and lower volumes of sustained jobs being achieved than originally hoped. In addition specifically in the East Birmingham area there was a pause in Destination Work delivery due to financial difficulties encountered by, and ultimately the closure of, one of the commissioned providers.

Best practice on breaking these 'micro-cultures' of worklessness is informing the creation of new programmes. West Midlands CA is bidding for DWP money for the Innovation Support Pilot which is based on the US experience through the Jobs Plus model which looks at long term unemployment in localities. Shard End in EBNS is in the top three areas within the CA area (alongside Kingstanding and Lozells East Handsworth). We understand that, currently, Kingstanding is seen as a priority, based on a basket of indices, meaning that it will likely be the priority location for delivery. (It may be that Shard End is targeted if other WMCLA constituent areas are not adopted). The programme will see a 'saturation model' put in place, targeting everyone, for upskilling and job search. Delivery will be commissioned and a Voluntary Sector organisation is likely to be selected. Community level delivery will take place through informal settings such as barbers shops, churches, mosques, and schools.

DWP staff state that the forthcoming Universal Credit (UC) reforms may have a role in creating new pro-work cultures. Forthcoming reforms to the benefit system mean that clients no longer 'sign on', and instead remain on UC until their wages are at a level sufficient to extinguish UC support. UC can more easily deal with flexible working and part time employment because it is linked to HMRC, allowing benefits to be automatically adjusted in line with paid hours. Birmingham and Solihull DWP staff are also looking at how the legalities of sanctioning might work, particularly around refusals of available jobs after long and expensive courses have been provided (eg HGV Cat2 driving courses take around 18 weeks and cost around £2000).

What does the evidence suggest is needed to reduce unemployment and improve skills? 2) The evidence around skills and employment support delivery settings

DWP staff suggest that developing a fine grained understanding of issues in particular areas is critical to an effective approach. Fixing persistent worklessness in East Birmingham and North Solihull is unlikely to come through major providers delivering big programmes. Evaluations of City Strategy Pathfinder initiatives undertaken from 2008, which found that 'the experience has demonstrated, irrefutably, is that more locally informed and based interventions are able to connect with, and gain the trust of, individuals who may (or may not) be on workless benefits, which allow them to engage with and explore the range of assistance and options available to them in a way in which, in general, local arms of national agencies have found it difficult to do hitherto."

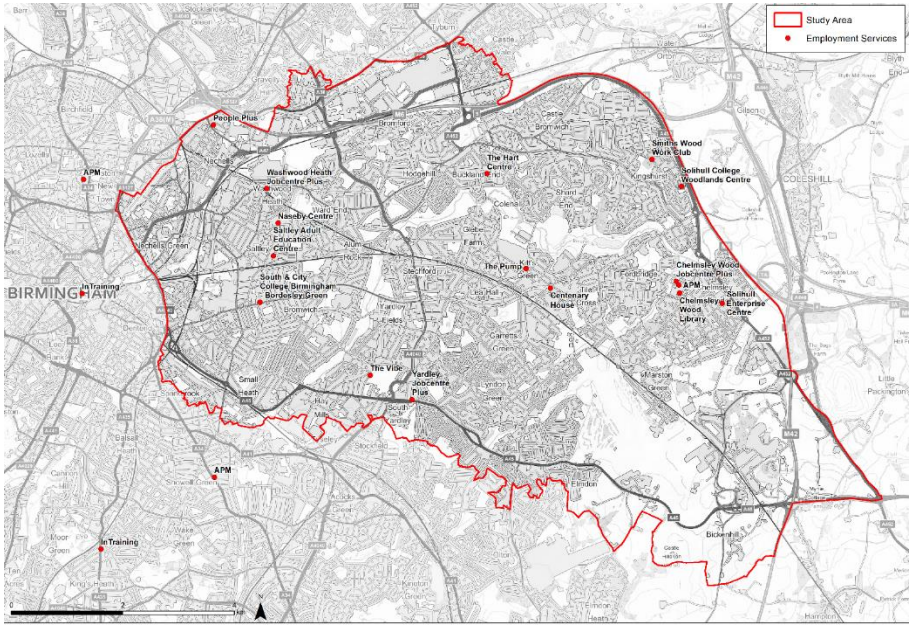
There are a number of initiatives under way which take this broad approach.

- DWP are commissioning District Jobs and Skills Plans in Q2 2017, and individual job centre input around the intricacies of local conditions is likely to be central to successful District Jobs and Skills Plans.
- At the moment, in North Solihull there are six locations outside Job Centres for providing skills and employment support for those seeking work. There are ten within East Birmingham.

DWP are attempting to respond to this evidence base, with attempts under way to deliver support through schools, mosques, churches and community groups, particularly through the Flexible Support Fund. Erdington Works is one example of good practice in this respect, and saw community level exercises run with businesses and community/residents groups to better understand how to intervene effectively in labour markets. As part of this process, links to local employers are being better developed. in Sparkhill, for example, there is work with the Asian Business Forum, allowing people with ESOL needs straightforward access to jobs. Job Centre staff frequently know the main business people and community leaders, and are able to invite those leaders in to show what DWP could do and how they could work together. Again at Sparkhill, one of the work coaches arranged for a meeting with the mosque, publicising services at Friday prayers.

Wider public estate moves around the streamlining of the health and education estate work well with this evidence. Evidence collated during the course of this study shows that NHS providers are keen about the opportunities to deliver employment support through the health estate, and employability provision would work very well with moves to create health and education community service hubs.

Distribution of skills and employment support locations in EBNS



Source: BCC

What does the evidence suggest is needed to reduce unemployment and improve skills? 3) The evidence around service complexity and the need for better employer relationships

There is evidence that the skills and employability programmes suffer from significant organisational complexity and overlapping responsibilities: the Birmingham Skills Investment Plan and the role of GBSLEP in sub-regional skills strategy add layers of complexity. Officers reported that there is a lack of clarity about how the Skills Investment Plan and GBSLEP provision is influencing the DWP agenda. DWP staff note that there have been historical attempts to undertake provision mapping (by searching for gaps and duplications in the geography and content of provision) but little has been successfully resolved as a result of these exercises. We understand that the Learning and Work Institute undertook a "fragmentation analysis" elsewhere in the Midlands, and found significant overlaps in different programmes and different agencies, and also big gaps in provision.

There is evidence on the need to streamline and refocus SFA, Intermediate, and Flexible Support Fund provision, both in EBNS and beyond. There are numerous schemes and providers, operating over different areas and with different specialisms. Evaluations are infrequent, and service quality is not tracked systematically. Some structural reforms are starting to deal with these issues: for example, quality is likely to be driven up through the start-up of a new system of payment by results for providers. This is a major structural shift which comes as part of the Dynamic Commissioning System which has been recently launched by DWP.

There is evidence that new models of provision are creating new partnership and service delivery opportunities: for example, the DWP Work and Health Programme (which is currently being commissioned to replace Work Programme, and will for the most part focus on the needs of those with disabilities) has seen design input from LAs, especially around looking at what is needed for people in health issues. This has never happened previously. This relationship is developing and needs time to play out; it adds complexity but DWP staff believe the costs are entirely worthwhile. There are working groups setting these up but is currently on a standstill whilst ITTs are out.

Officers interviewed in the course of this study have stated that relationships with employers could be made more coherent, with clearer lines of communication between national and local Government staff, LEP staff, DWP, and employers. Relationships are frequently complex and fractured, without clear 'owners'. Whilst DWP staff work at the airport and NEC Job Point, creating strong relationships with those employers, DWP staff state that their main relationship with JLR is through the Council and national DWP relationship managers. However, there is little clear "line of sight" for jobseekers through to JLR jobs, although there may be good reasons for this (DWP provision only works to Level 2 skills, typically lower than required by JLR).

When effective, evidence suggests that relationships with employers can be very effective: for example, John Lewis in Birmingham and Solihull stores provide DWP clients with work experience for four weeks. At the two-week point, they have specific work coach to the end of the work experience, resulting in a very successful 58% going into work. Similarly, Tesco works with Job Centre Plus by providing a programme (tailored to an employer) whereby candidates obtain work experience in-store, and are then guaranteed a job interview.

There may also be a role for ensuring that employers' responsibilities are clarified. For example, LGV training for Blue Arrow and John Lewis Partnership costs around £2000 per person, and it may be reasonable to investigate how these costs can be at least partially recouped.

This report does not substitute for future vision and strategy – but the evidence we have collected suggests a number of lines of future investigation

This work is not intended to substitute for a vision and strategy for EBNS. However, the evidence points to a number of possible lines of investigation for future work. There is scope to make innovative solutions in EBNS, if this innovation is delivered in a properly controlled and evaluated way.

- **The evidence suggests that partners need more clarity around who does what, when, where, and with whom.** Information on spend and an evaluation mechanism could be built in. Work on how the interface between education and the workplace might be better managed would also be helpful. Ideally, there would be more control around detailed actions planning, roles, responsibilities and timeframes to address worklessness which are not in the Skills Investment Plan. The work could, possibly, be part of a refined DWP District Plan. These could broaden out from their focus on DWP provision, driving it wider to encompass wider Local Authority and even private sector provision.
- **It could be important to avoid further duplication and fracturing of responsibilities.** The Birmingham Employment and Skills Board and the Solihull Employment and Skills Board report into the LEP's Employment and Skills Board (chaired by Andrew Cleaves, Principal and Chief Executive of Birmingham Metropolitan College). Work from the Combined Authority Productivity and Skills Commission will need to be incorporated (the Commission will be publishing a strategy after the closure of this baselining project).
- **Longer term funding** would overcome the efficiencies associated with stop-go project-based delivery. Evidence suggests we should see employability and skills delivery as a service, rather than a set of projects.
- **A focus on particular sub-groups.** There are some perceptions that though YEI and YPP could be considered to be already dealing with this issue, EBNS might work to focus this provision down to particular gender, age and ethnicity groups, perhaps through a more fine-grained, sensitive and ethnographic approach to research.
- **Evidence suggests that public sector employers – notably Heartlands Hospital - could take a more innovative approach to developing local skills and links to local job seekers.** Some good practice appears to be available through the HS2 Education and STEM ambassadors, and the South & City College Bordesley Green Campus has established links with the High Speed Rail College.
- **A geographically tailored focus on getting Work Coaches out of job centres and into more informal community settings where support is more effective.** Issues appear to be highly distinctive between, say, Chelmsley Wood and Alum Rock, and so solutions will vary widely.
- **A focus on One Public Estate efficiencies.** This study has shown that there are real opportunities to work along wider One Public Estate Initiatives in health and education.
- **A focus on keeping people in work and an innovative approach to new policy.** Given the 'payment by results' model of funding which is being adopted by DWP, it may be that the importance of supporting individuals to sustain and progress in employment will become a greater imperative. Incentive payments focused on staying in work might have a role and evaluation findings from earlier programmes could be reviewed on this issue. If incentive payments are effective in building a culture of working in individuals and communities, such approaches have the benefit of short-circuiting a great deal of complexity around commissioning provision, and would be assisted when Universal Credit arrives in full, because more flexibility under UC would be available.
- **A focus on correcting anomalies in provision.** For example, traineeships do not get travel payments, but apprenticeships do. EBNS may be able to address this inequality for individuals within the area.

Officers suggest that one of the biggest prizes for the future could be around changing young peoples' attitudes to work, and transmitting a positive and realistic sense of the opportunities available. The seeds of a future programme could already be in place, which could work well at a time of public sector austerity

Although it is hard to point to hard evidence on social norms and values, we have shown above that there is good evidence to suggest that, in some places, we need to reinforce a positive intergenerational culture of working and aspiration. One of the biggest single prizes for delivery in the area could be to set in place long term measures to deliver a pro-work cultural shift in hard-to-help families. Detailed and sensitive thinking would need to be carried out, but a distinctive EBNS approach might evolve here which specifically targeted young people, and aimed to provide clear, aspirational but entirely realistic "lines of sight" to employment opportunities in the area. There could be a role for a reinforced careers service here.

Evidence suggests that there are possibly the starts of such a programme in place. This approach was adopted as part of work undertaken through the North Solihull Partnership, and Birmingham already has a Charter of Social Responsibility which is signed by any contractor with works over the value of £1m – committing them to activities such as schools liaison, the provision of work experience for young people, school site visits, and so on. BCC is in the process of contracting £15m through Balfour Beatty for school construction, and will be adopting this approach. (Chalet-style outside classrooms will be constructed at schools, with the involvement of children).

This approach could be up scaled to deal with the billions of pounds-worth of contracts likely to be commissioned for the public sector in EBNS over the next decade, alongside private sector investment (see BCC's contribution to House of Lords Infrastructure and Employment Sub-Committee, Oral and written evidence, 2014). Each successful contractor could be asked to start a schools programme, which would attempt to inculcate an optimistic but realistic sense of the possible future job opportunities, alongside developing the soft skills that employers say they need. A significant merit of this approach is that it might cost relatively little public sector funding, aside from employer relationship building, some contracting and procurement support to enforce delivery, and some programme support through a revitalised careers service. (There are limitations in Careers Service funding, meaning that young people from families with little experience of wider labour markets get relatively little exposure to the career choices which might be available. Some of this role might be picked up via schools - Careers Service funding is limited, whilst schools have statutory responsibilities). The Public Services (Social Value) Act of 2012 backs this approach and requires public authorities 'to have regard to economic, social and environmental well-being in connection with public services contracts'. The legislation does not define 'well-being' but official guidance encourages commissioners of public service contracts to meet the wider social, economic and environmental needs of the community, as well as the best price.

Improved relationships between schools and the private sector could be developed through mechanisms other than a pure contractor relationship. Nationally, a number of large employers – such as JLR and Microsoft – have established schools programmes which could be extended further. There are also opportunities such as those available through University Technical Colleges (UTCs) which could be further examined. This work could aim to be highly ambitious, and create a genuinely revolutionised relationship between schools, HE and employers.

Careful scoping and evaluation would be needed. But because of the relatively light load on public sector resources that this approach creates, this approach might work neatly with a continued time of public sector austerity.

Health and wellbeing

Key issues:

- Prevention and early intervention on lifestyle related conditions remains important
- Long term sickness is higher than average, with mental and behavioural disorder being a significant problem
- Adverse childhood experiences and child poverty create long term problems
- Obesity and poor air quality are major issues
- Interdisciplinary solutions could get traction

A brief review of the literature and local context

Whilst health and wellbeing is a very wide topic, in this baseline report we focus that remit on the issues which are likely to have the most direct relationship to the current and future economic success of the East Birmingham North Solihull areas. We see those issues as being those which have a particular impact on the capability of individuals to participate in the labour market, and make a full economic contribution without barriers being placed in their way by ill-health. In this section, we look at the evidence regarding the prevalence and causes of health and wellbeing problems, what is currently being done, and what the evidence suggests might be done in future.

Attempts to look at the underlying causes of health and wellbeing problems are complicated by the fact that poor health can simultaneously be both a cause and effect of social and economic problems. Studies have distinguished between the primary indicators of public health, and proxy indicators.

Primary indicators are predominantly linked to the wider and social determinants, including access to employment, and education, a good working environment, access to housing and healthcare services.

Secondary, or proxy indicators include the ones that we often consider to be primary, including mental health, heart disease, respiratory disease, alcohol related hospital admissions, and preventable premature mortality rates. It could be argued that these indicators are indeed primary ones. However, they are predominantly preventable, and are linked firmly to the wider determinants. We know that people in more affluent wards and districts in Birmingham live on average 10 years longer than those in the most deprived areas (figure 2). We also know that they have a better quality of life for longer.

Given that causes and effects of poor health are so embedded in one another, it can be unhelpful to look for a single underlying 'root problem': such a problem is elusive. Instead, we must start somewhere, and the most productive way forward would appear to be trying to identify both the primary *and* proxy manifestations of poor health, and tailoring action to deal with each, in the expectation that, over time, health and wellbeing is improved. Because other parts of this baseline are looking specifically at dealing with unemployment, poor skills and consequent poverty, this section will concentrate on the main proxy indicators of public health.

Life expectancy rate at birth (2007/09) Birmingham mean: 79

Data source: Birmingham Electoral Ward Profiles (August 2011) Birmingham Public Health Information Team http://bit.ly/phitwp0811

Economic and community influences on health and wellbeing are critical. But the evidence suggests that fixing the long term cannot overshadow dealing with the 'here-and-now'

There is good evidence to show that the majority of ill health - including mental ill-health and chronic illness - is preventable and is related to wider determinants. The Barton and Grant (2006) model shows that lifestyle decisions, community networks, and the built environment are some of the biggest drivers for health and wellbeing outcomes. Areas of high deprivation and those people lower down the social gradient are far more likely to have poor health and wellbeing outcomes. We know that people who live in areas of high deprivation make poorer lifestyle and behaviour choices and take risks associated with poorer health outcomes, including substance misuse, drinking to harmful and hazardous levels, and smoking.

We also know that families without a working member are more likely to suffer persistent low income and poverty. There is also evidence of a correlation between lower parental income and poor health in children (Griggs & Walker 2008).

The 2010 Marmot Review on Health Inequalities sums the issue up as follows.

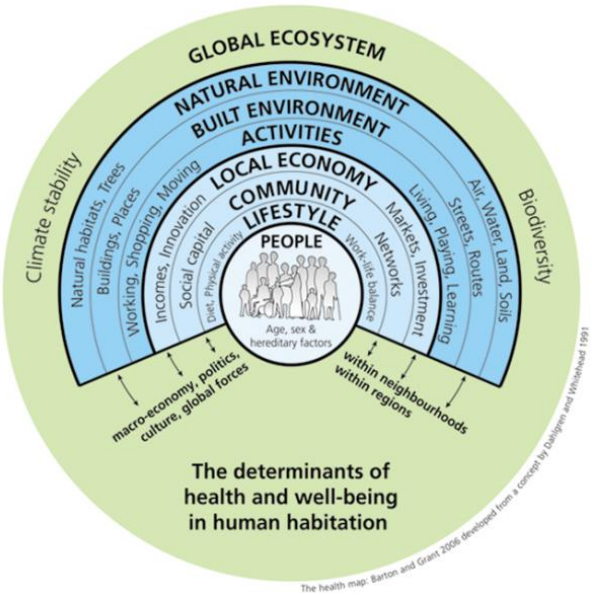
"People with higher socioeconomic position in society have a greater array of life chances and more opportunities to lead a flourishing life. They also have better health. The two are linked: the more favoured people are, socially and economically, the better their health. This link between social conditions and health is not a footnote to the 'real' concerns with health – health care and unhealthy behaviours – it should become the main focus. In other words, we need to tackle the wider determinants of health. There needs to be a fundamental shift away from a focus on health care and unhealthy behaviours, and a refocus on social conditions."

The built environment contains the very material determinants of health, including housing, neighbourhood conditions and transport routes, all of which shape the social, economic and environmental conditions for which good health is dependent (GCPH 2013) and Improving the health of the working age population is critically important for everyone, in order to secure both higher economic growth and increased social justice (Waddell 2006).

Evidence (from Marmot and other academic papers) suggests that health and wellbeing can be expected to improve as the economic and social success of the area is improved.

However, EBNS needs to make progress for the health of its inhabitants in the here and now. This structural economic change is a long term process, so addressing *current* health issues with a degree of urgency is also justified.

The Barton and Grant model shows that economic and community influences on health and wellbeing are important



Source: Barton, H. and Grant, M. (2006) A health map for the local human habitat

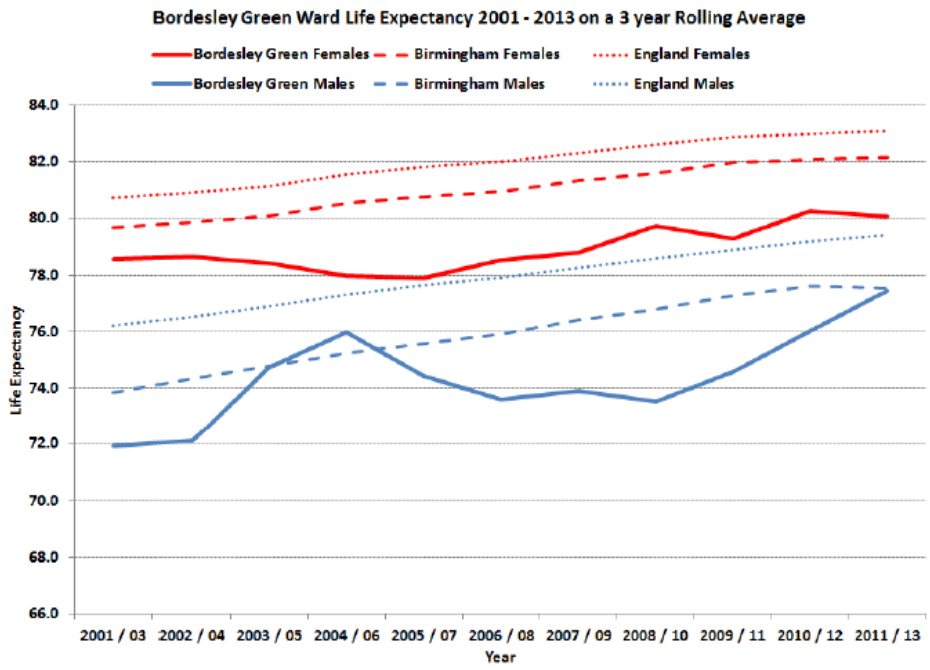
To deal with the ‘here and now’ issues, continued prevention and early intervention on lifestyle related conditions will be important

There are 13 wards over four districts in Birmingham, and five wards in Solihull, that make up the East Birmingham and North Solihull footprint. We find similar health and wellbeing concerns:

- Child poverty
- Infant mortality
- Preventable deaths under the age of 75
- Premature death from coronary heart disease
- Premature death from respiratory disease
- Premature death from cardiovascular disease
- Premature death from cancers
- Significantly high levels of diabetes
- Significantly high levels of obesity
- Significantly high levels of mental health
- Communicable disease deaths

We have taken Bordesley Green as a case study. The chart shows that Bordesley (and Birmingham) life expectancy is around two years under the English average. The life expectancy change over time does not follow the English or Birmingham rate of change, indicating that there are clear health and wellbeing issues that are not being addressed. The precise reasons for this would need detailed separate study.

Bordesley Life Expectancy against Birmingham and English averages



Evidence put together by BCC shows that the many health and wellbeing issues are underpinned by wider and social determinants, and that many premature deaths are preventable

The spine chart (right) is a graphical interpretation of the position of Bordesley Green district according to important health indicators. The chart portrays Bordesley Green's value (shown by a coloured circle) against the spread of values for all Birmingham districts (the grey horizontal bars) compared to a benchmark of either the England or Birmingham average (the central black line). The circle for Bordesley Green is coloured red for those indicators where the Bordesley Green value is significantly worse than the benchmark, green for indicators where it is significantly better than the benchmark and amber where it is similar to the benchmark. In addition, some indicators are coloured light or dark blue. These are indicators where a value judgement cannot be made about whether a high value is good or bad. For example a high diabetes prevalence may indicate poor levels of health in the case of high numbers of people with diabetes; alternatively, it could indicate good performance in primary care if GPs are good at identifying and recording cases of diabetes.

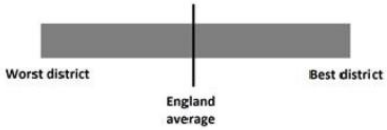
- If you live in Bordesley Green your life expectancy is below the England and the Birmingham average
- Mental health, dementia, and depression prevalence are all significantly higher than the England average
- 100% of Bordesley Green's population fall within the most deprived 20% of areas in England.
- During 2011/13 Bordesley Green ward's under 75 death rate was 32.1% higher than the rate for England (Birmingham was 23% higher than England)
- Infant Mortality is one area of concern: the district rate was 12.9 per 1,000 live births in 2011/13, this compares to an England rate of 4.0 and a Birmingham rate of 7.4
- There were 248 homeless registrations between 2012-2014 in Bordesley.
- The average age of death for a homeless person is 43-47 years of age.
- Over 70% of people using homelessness services report having experience of mental distress.

Bordesley Green Ward Health Indicators Spine Chart – Birmingham Public Health 2015

	Indicator	Bordesley Green Number	Bordesley Green Stat	B'ham Avg	Eng Avg	Ward Range
1	% of Children in "Poverty" 2012	3830	29.4	29.9	19.2	
2	Adults with learning dis. in stable accommodation 2013/14	44	53.0	51.2	73.5	
3	Violent Crime Admissions 2010-14	121	98.5	78.1	57.6	
4	Low Birth Weight 2013	63	8.1	10.0	2.9	
5	Excess weight 4-5 year olds 2013/14	186	24.6	23.2	22.5	
5	Excess weight 10-11 year olds 2013/14	290	42.5	38.8	33.5	
6	Injuries due to falls 65+ Persons 2013/14	62	2380.4	2931.1	2011.0	
7	Infant Mortality 2011-13	n/a	12.9	7.4	4.0	
8	Mortality from all causes U75 2011-13	217	132.1	123.2	100.0	
8	CVD Deaths U75 2011 -13	45	134.2	129.5	100.0	
8	Cancer deaths preventable U75 2011-13	33	60.5	116.8	100.0	
8	Respiratory disease deaths preventable U75 2011-13	n/a	86.4	132.8	100.0	
8	Communicable disease deaths 2011 -13	43	160.3	111.8	100.0	
8	Diseases of the liver deaths preventable (U75) 2011 -13	n/a	161.3	126.1	100.0	
9	Hip fractures 65+ admissions 2013/14	66	510.2	617.8	568.1	
9	Alcohol related admissions 2013/14 (narrow)	147	701.2	711.5	829.4	
10	Diabetes Prevalence 2013/14 (QOF)	1473	6.5	8.1	6.2	
10	Mental Health Prevalence 2013/14 (QOF)	330	1.2	1.1	0.9	
10	Dementia Prevalence 2013/14 (QOF)	237	0.8	0.5	0.6	
10	Depression Prevalence 2013/14 (QOF)	1604	7.5	6.0	6.5	

Key:

- Significantly better than England average
- Not significantly different from England average
- Significantly worse than England average
- No significance can be calculated
- Significantly lower than the England average*
- Significantly higher than the England average*



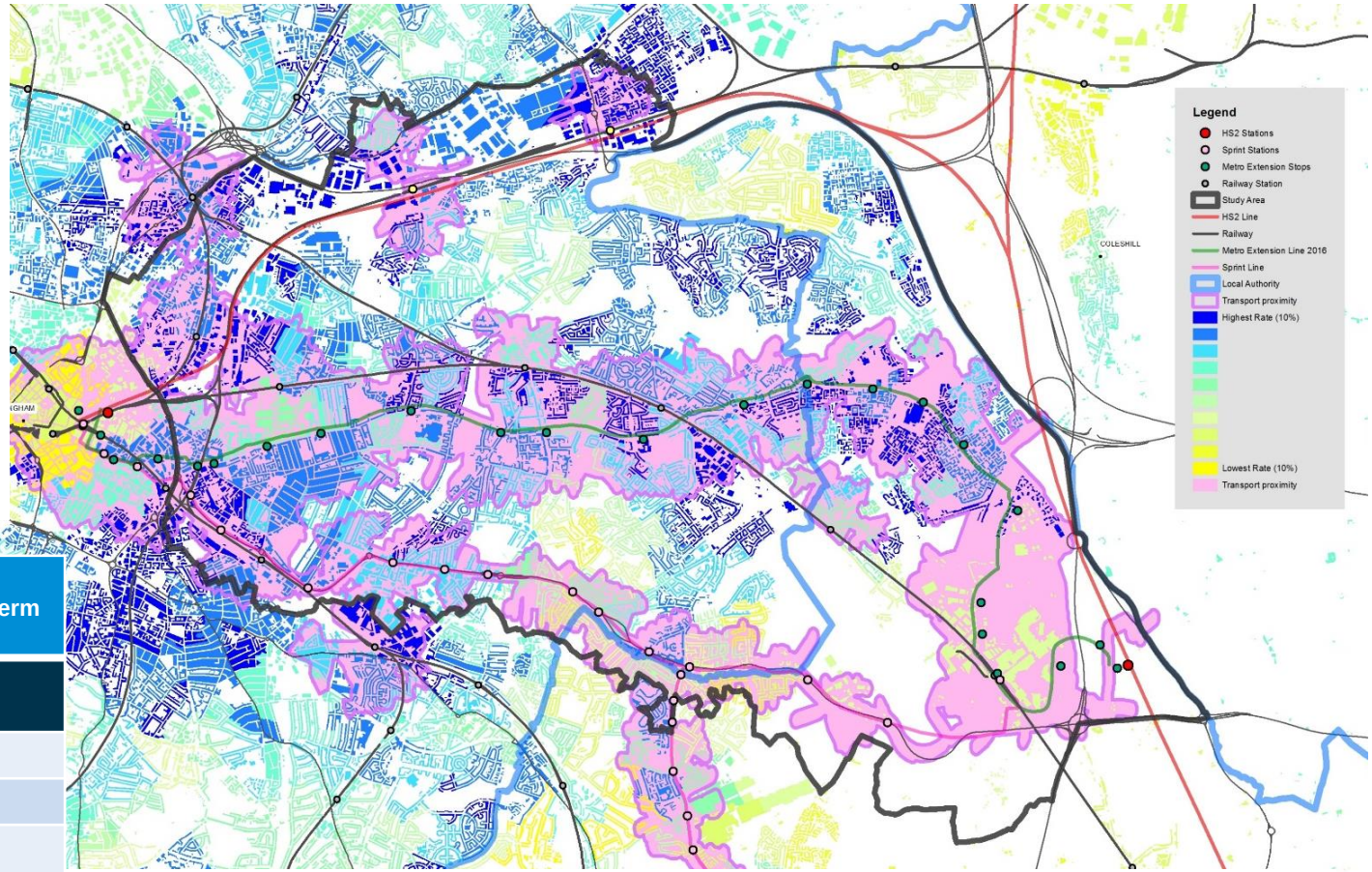
Health and wellbeing problems affect the life chances of individuals affected. Aside from the equity issues raised, health and wellbeing issues have a serious impact on the economic activity rate: long term sickness and disability in EBNS is around 50% higher than the English average

This pattern can also be seen in higher proportions of people out of the labour market due to permanent sickness or disability than across England and neighbouring areas.

The data shows the proportion of adults aged 16-74 who are economically inactive and have a long term sickness or disability. Economic activity relates to whether or not a person was working or looking for work in the week before Census.

The table below demonstrates that rates of economic inactivity due to long term sickness or disability are around 50% higher than the England average.

Proportion of adults aged 16-74 who are economically inactive and have a long term sickness or disability



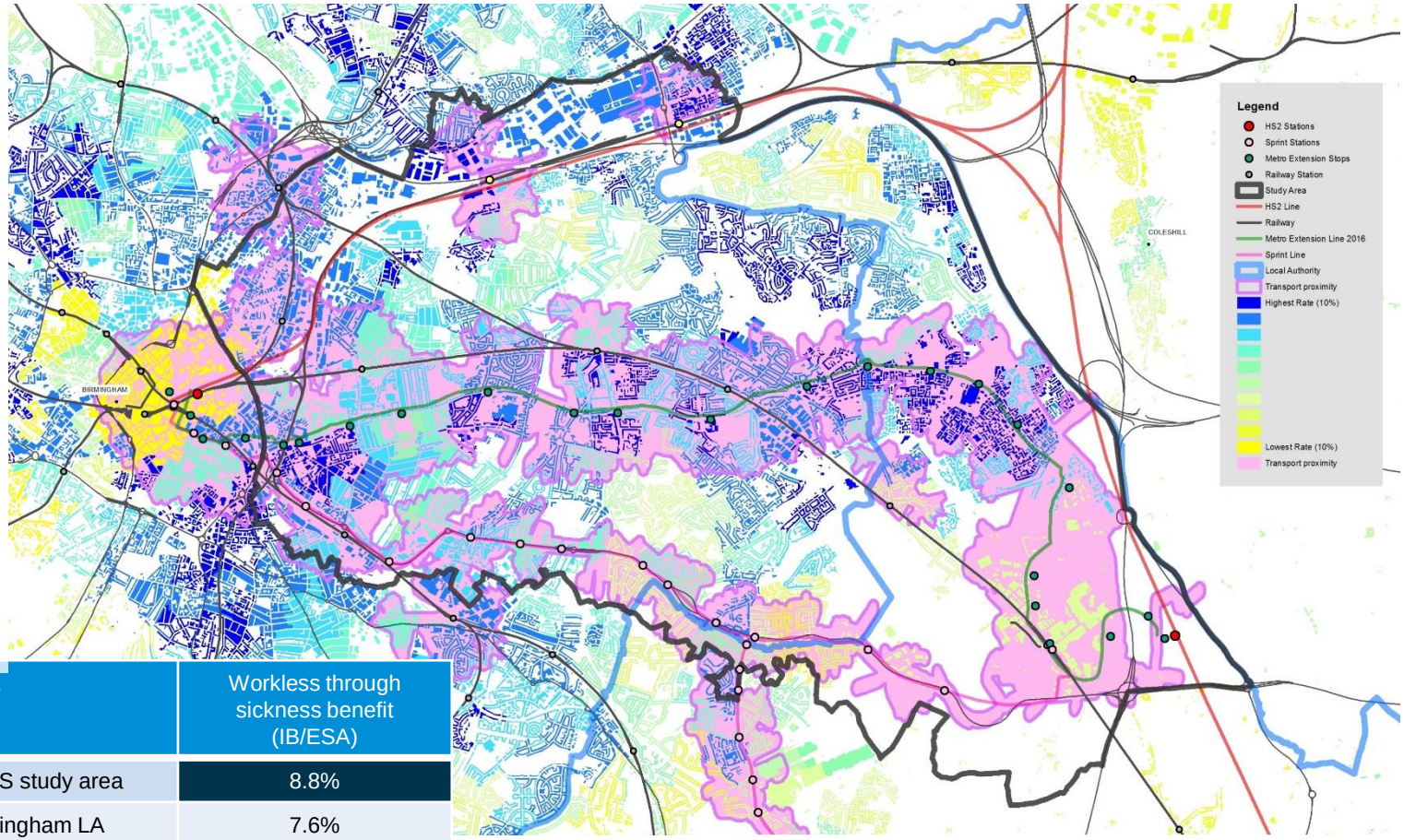
Area	Economically inactive: Long-term sick or disabled
EBNS study area	6.3%
Birmingham LA	5.3%
Solihull LA	3.3%
WMCA constit LAs	5.0%
England	4.0%

Dataset: *Proportion of adults aged 16-74 who are economically inactive and have a long term sickness or disability.*
Date: *2011*
Source: *Census 2011*

People who are economically inactive due to sickness and disability translate into high rates of Employment Support Allowance claims in the EBNS area

The dataset shows the proportion of people who are out of work and receiving benefits relating to poor health: Incapacity Benefit (IB) / Employment Support Allowance (ESA). IB and ESA are workless benefits payable to people who are out of work and have been assessed as being incapable of work due to illness or disability and who meet the appropriate contribution conditions. ESA replaced IB and Income Support paid on the grounds of incapacity for new claims from October 2008.

A number of areas in EBNS are in the highest decile of IB/ESA claiming rates in the country. However, there are pockets of very low claimant rates around Castle Bromwich and parts of Hodge Hill, Sheldon and Stechford.



Area	Workless through sickness benefit (IB/ESA)
EBNS study area	8.8%
Birmingham LA	7.6%
Solihull LA	5.0%
WMCA constit LAs	7.2%
England	6.0%

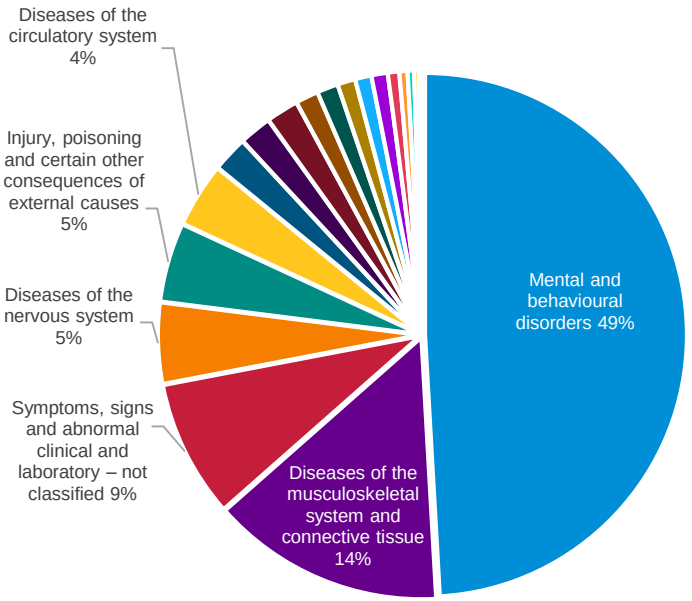
Dataset: P*roportion of people who are out of work and receiving benefits relating to poor health: Incapacity Benefit (IB) / Employment Support Allowance (ESA).* **Date:** *May-16*
Source: *Department for Work and Pensions (DWP)*

Mental and behavioural disorder is by far the biggest reason why people are claiming ESA/IB in ENBS. That category is three times larger than the next largest category, which is musculo-skeletal disorders

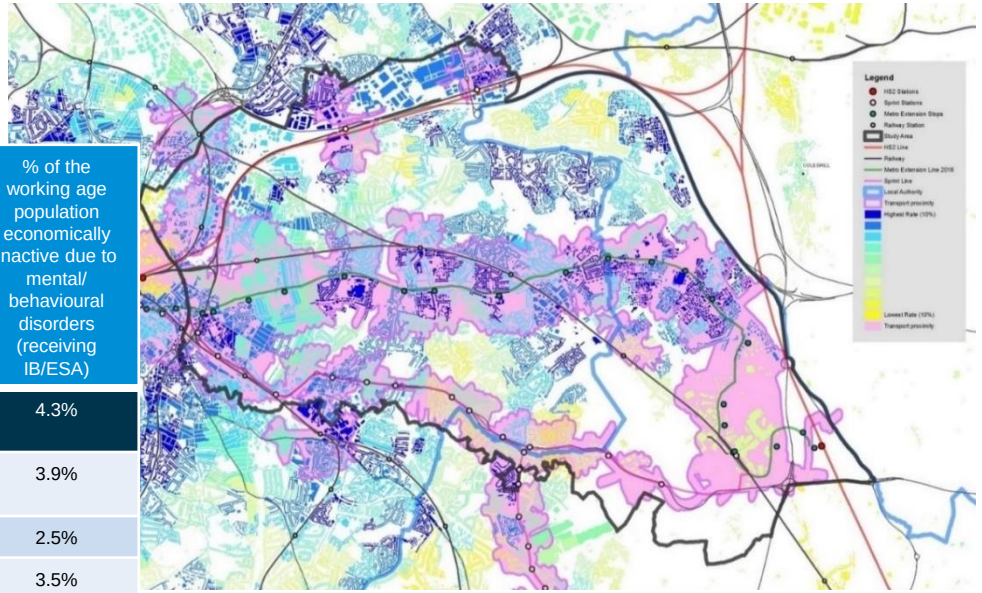
Data in the table to the right sets out the reasons why people in Birmingham and Solihull are claiming ESA. Approximately half of all people receiving ESA/IB in Birmingham and Solihull are claiming for mental health reasons. Data shows that that proportion rises to around 63% of all claimants for those aged 25-34. In general the proportion of all claimants with a mental or behavioural disorder falls with increasing age. Mental health difficulties range from patients with a diagnosis of depression and/or anxiety disorder to schizophrenia, bipolar affective disorder and other psychoses. Note that mental health difficulties are a national issues, rather than one particularly confined to EBNS. The next largest reason why ESA/IB was being claimed related to diseases of the musculoskeletal system and connective tissue.

The table below shows that this means that with more than 4% of the working age population are economically inactive due to mental/behavioural disorders. We can see the geographical distribution of mental health difficulties across EBNS in the map below.

Birmingham and Solihull: reasons for ESA claims



Area	% of the working age population economically inactive due to mental/ behavioural disorders (receiving IB/ESA)
EBNS study area	4.3%
Birmingham LA	3.9%
Solihull LA	2.5%
WMCA constit LAs	3.5%
England	2.9%



Dataset: *Shows the proportion of people receiving out of work benefits due to poor mental health (IB-ESA for mental health reasons). The figures for the number and proportion of people with mental health issues are based on the claimants of Incapacity Benefit who are claiming due to mental health related conditions. Incapacity Benefit is payable to persons unable to work due to illness or disability.*
Date: *May-16*
Source: *Department for Work and Pensions (DWP)*

Table 1: ESA/IB claimants by age Birmingham & Solihull *Source: DWP/NOMIS/BCC*

Age	Birmingham & Solihull - Mental & behavioural disorder	Birmingham & Solihull - All claimants	Those with a mental & behavioural disorder as % of all claimants		
			Birmingham & Solihull	Core Cities	Great Britain
Under 18	50	110	45%	55%	52%
18-24	2,830	4,880	58%	62%	61%
25-34	6,480	10,230	63%	66%	64%
35-44	7,200	12,300	59%	61%	58%
45-49	4,290	8,300	52%	55%	51%
50-54	4,220	9,310	45%	49%	44%
55-59	3,630	9,430	38%	41%	37%
60+	2,460	7,460	33%	35%	30%
Total	**31,160**	**62,030**	**50%**	**52%**	**49%**

The 2017 West-Midlands Combined Authority Action Plan to drive better mental health in the West Midlands (entitled *Thrive)* finds that the cost of mental ill health in the West Midlands is around £12.6b per annum – approximately £100m pa in EBNS

Thrive finds that *"People with mental ill health get a raw deal…the cost of mental ill health to the West Midlands is estimated to be £12.6 billion per year. We now have the knowledge and understanding to address this, to make better use of public and private resources to achieve better results for people. So the moral and the economic case for acting is unanswerable".*

Norman Lamb – West Midlands Combined Authority (2017)

A very rough pro-rata of these findings by population suggests that the costs of mental ill health in EBNS is around £100m per annum. *Thrive* has a number of themes for action.

- Theme 1: Supporting people into work, and supporting them whilst in work (via IPS model)
- Theme 2: Providing safe and stable places to live, including a *housing first* model.
- Theme 3: Mental Health and Criminal Justice, including developing a programme that more effectively supports people with mental ill health as they prepare to leave prison and settle back in the community.
- Theme 4: Developing approaches to health and care; very similar to the aspirations of Forward Thinking Birmingham – improving accessibility and outcomes.
- Theme 5: Getting the community involved, including a large public health programme to get 500,000 people across the West Midlands in Mental Health First Aid.

Evidence from officers suggests that there is a growing understanding of the costs and benefits of dealing with the link between poor mental health outcomes, ACEs and deprivation, and breaking the intergenerational cycle of deprivation. For example, officers state that the CCG can ensure that contracts and facilities reflect the social determinants of health and are not merely outlets for medical/clinical intervention. GPs are reporting that more and more patients are presenting with a social problem and not necessarily a medical one, although the physical manifestations of the issue could have outwardly clinical symptoms, including anxiety, depression and hypertension.

There may be an opportunity to consolidate new and emerging recommendations, strategies, services and facilities into real outcomes for EBNS.

Birmingham performs badly on child mental health compared to the national average, suggesting that mental health problems will persist into the future. Within Birmingham, evidence suggests that EBNS is likely to perform amongst the worst

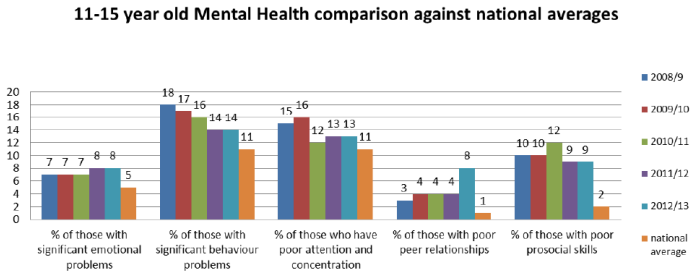
Each year a survey of a sample of Children and Young People is undertaken in Birmingham schools. Statistical breaks which allow us to focus on EBNS are not available, but even so, Wilkes (2014) finds that there are some striking differences in these patterns revealed in the survey when compared with the national norms. Of those that completed the survey it was found that:

- 8% of 11-15s have emotional problems compared to the national average 5%.
- 14% of 11-15s have conduct disorders compared to the national average 11%. Although there appears to be a decrease in trend, it still has been consistently higher than the national average
- 13% of 11-15s have poor attention and concentration, compared to 11% national average.
- 4% of 11-15s have poor peer relationships compared to the national average 1%.
- 9% of 11-15s poor pro-social skills compared to the national average 2%.

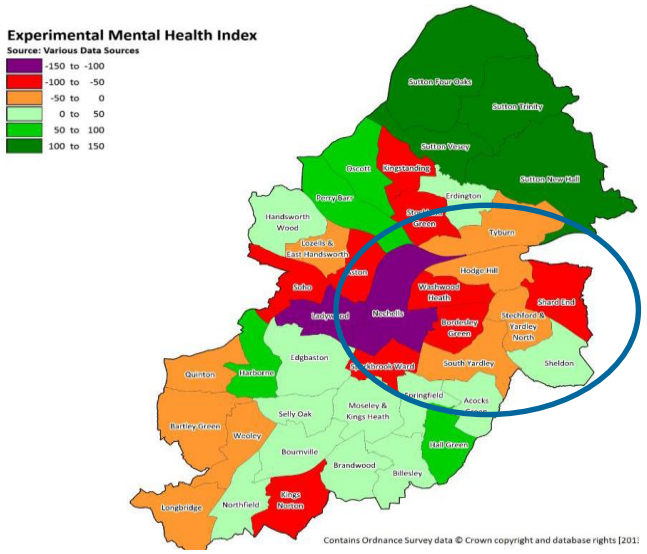
Solihull uses a different method for collecting emotional wellbeing data from children & young people than Birmingham so it is difficult to make direct comparisons. However, the findings of the Health Related Behaviour Questionnaire (from secondary school pupils aged 12 to 15 surveyed in Solihull in 2016) are available. The first figure is the North Solihull schools data, and the figure in brackets shows the overall Solihull percentage for comparison. The North Solihull cohort responded more negatively than the Solihull average. Only statistically significant findings are listed.

- NS 27% (38% Solihull average) of pupils responded that they enjoy 'most' or 'all' of their lessons at school
- NS 21% (15% Solihull average) of pupils had a med-low self esteem score (9 or less)
- NS 37% (46% Solihull average) of pupils had a high self esteem score (15 or more)

An attempt to use national and local research to assist in predicting where the communities of greatest need resulted in a local Mental Health Index. It scored the factors identified in the published research to have an impact upon children's emotional health. It was then used to identify communities with a more or less of these factors and therefore an influence on the likelihood for the children to develop emotional distress or mental illness. Whilst data was not collected for North Solihull, the work indicates that the East Birmingham area is likely to contain some of the most acute child mental health needs.



Source: Dr Dennis Wilkes for BCC (2014) Children & Young People's Mental Health Drivers & Responses



Source: Dr Dennis Wilkes for BCC (2014) Children & Young People's Mental Health Drivers & Responses

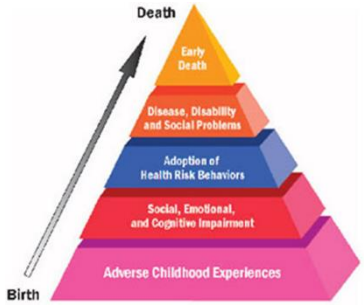
Further evidence is emerging on the long term effects of a poor childhood. Chronic early stress in childhood, termed Adverse Childhood Experiences (ACEs) damage long-term life chances and create less productive members of society

In 2015, Public Health Wales reported recent evidence that demonstrates that chronic traumatic stress in early life alters how a child's brain develops and can fundamentally alter nervous, hormonal and immunological system development. The report stated that "Children who experience stressful and poor quality childhoods are more likely to adopt health-harming behaviours during adolescence which can themselves lead to mental health illnesses and diseases such as cancer, heart disease and diabetes later in life. Adverse Childhood Experiences are not just a concern for health. Experiencing ACEs means individuals are more likely to perform poorly in school, more likely to be involved in crime and ultimately less likely to be a productive member of society."

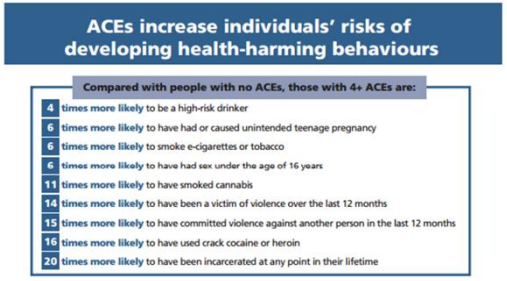
However despite significant investment, the report found that the overall impact of these programmes on preventing ACEs is often unclear. The report stated that in order to effectively reduce ACEs and improve individuals' life course prospects, a number of issues should be addressed. The report is worth quoting in detail.

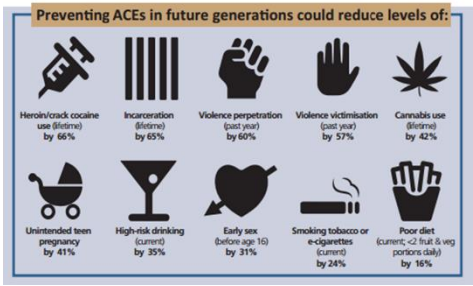
- *"Firstly, improved awareness is needed of the importance of early life experiences on the long-term health, social and economic prospects of children. Information should be available to a wide range of professionals (health, education, social, criminal justice and others) on ACEs, their consequences and how they can be prevented. Information should also be disseminated to the public and especially those planning or having children.*
- *[…] a better understanding is needed of specifically what support every individual should and ultimately does receive. Support must conform to established and emerging evidence of what works in the prevention of ACEs and the successful development of resilience in children.*
- *Finally, some families (often but not exclusively in deprived communities) require enhanced support in parenting and child development…what is actually delivered, how well needs are met and how well interventions match the evidence for ACE prevention is sometimes unclear. ACEs may be prevented through enhanced public and professional awareness, evidence-informed universal service specifications, effective pathways into additional support, monitoring of intervention coverage and content and, routine audit of fidelity to intervention specifications. While Public Health may have a leadership role in these developments they require partnerships and investment from healthcare services, local authorities and more widely across the whole public sector."*

Infographics relating to Adverse Childhood Experiences (ACEs) offer a picture of the impact of poor child development and family dysfunction.



The first ACE image (left) offers an overview of ACEs and their impact across the life-course, ultimately leading to premature mortality. The second ACE infographic (bottom left) shows the impact of ACEs on children can manifest as outcomes as an adult. However, from an asset based perspective, the third ACE infographic (bottom right) shows the outcomes that can be achieved if we intervene at an early age, or better still, prevent ACEs.





Source: 2015 Public Health Wales NHS Trust

There is evidence to suggest that family intervention and counselling can help break the inter-generational cycle of deprivation

Dr Dennis Wilkes' work for Public Health Birmingham notes that the work of Field, Munro, Allen, and Marmot has been developing the case for earlier intervention to prevent or diminish the development of child and family dysfunction. The objective would be to try to break the inter-generational cycle of deprivation. Wilkes reports that Allen in particular called for action to set up a culture of early interventions to develop a virtuous spiral out of recurrent difficulties.

The evidence for this case was developed in more detail by a Birmingham Task & Finish Group in 2013 and was integrated into the Birmingham Child Poverty Strategy. The Group identified there were two groups of early interventions. Reactive Early Interventions, namely interventions delivered early in the development of a child's or family struggle thereby preventing escalation of need for specialist assistance, and Programmed Early Interventions which are delivered early in the child and family's life with the aim of reducing the likelihood of difficulties arising in the first place and enhancing the child's development to improve the likelihood of achieving their full potential.

The Task and Finish Group supported the commissioning of services that strengthen family functioning and build resilience through evidence-based interventions such as Functional Family Therapy, Family Group Conferencing and Solution Focussed Therapy. The approaches aim to change family interaction and family relationships, and through this, individual problem behaviour.

Established challenging behaviours or conduct disorders in young people were identified as requiring attention through the use of evidence-based interventions that tackle challenging behaviour in children such as specific Cognitive Behaviour Therapy Programmes related to Aggression Reduction Therapy and Multi-Systemic Therapy. In response to the mental health needs of young people, it was proposed that the systematic use of Cognitive Behaviour Therapy by health professionals is increased and available early at the point of identified need for teenagers with anxiety, depression or psychological issues. Selective Programmed Early Intervention is the rationale of the Right Service, Right Time framework adopted locally by the Birmingham Safeguarding Children Board. In Birmingham there are programmes which have been shown to have a positive impact upon children and families before entrenched problems have arisen, namely Family Nurse Partnership, Triple P, Safe Care, Incredible Years and Promoting Alternative Thinking Strategies.

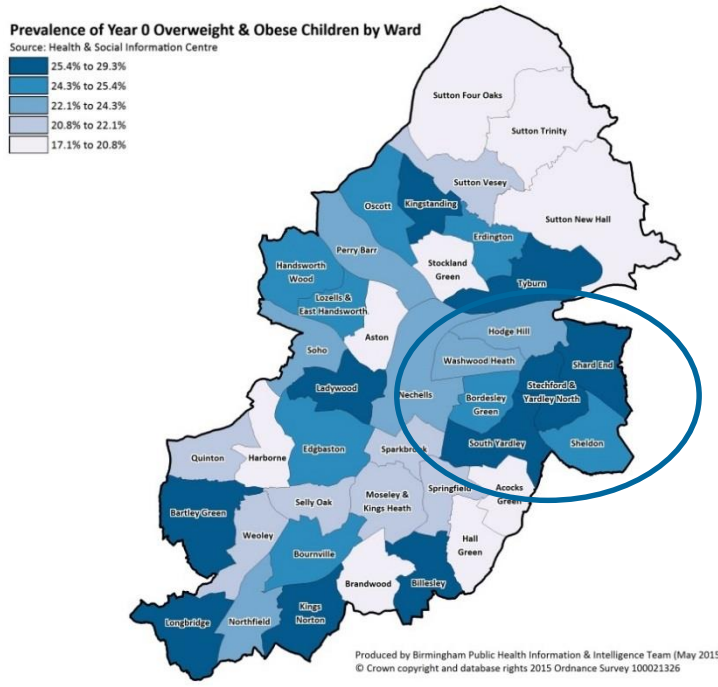
We understand from BCC officers that an update report has gone to Scrutiny and Overview which tracks progress on this issue.

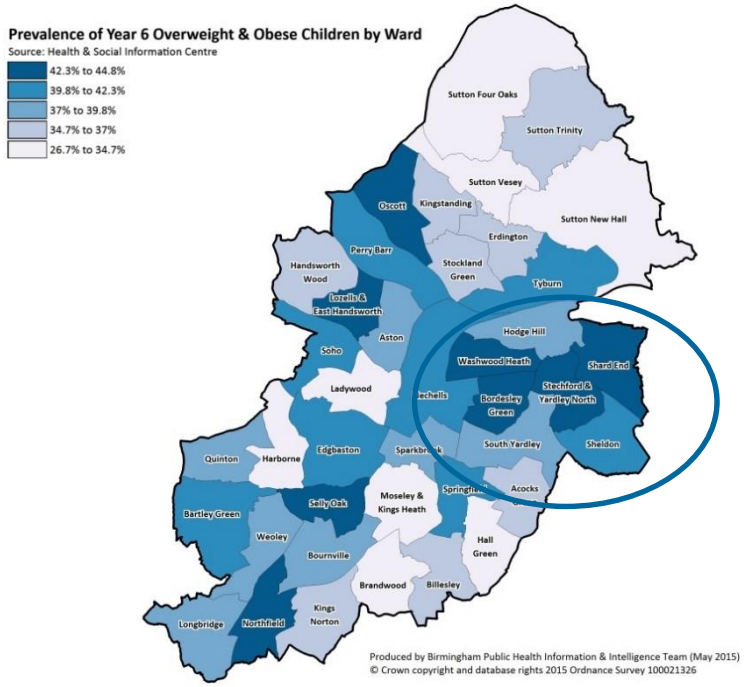
Obesity and sedentary lifestyles are generating major long-term health costs

The maps below show the prevalence of overweight and obesity at yr. 0 (when children start primary school) and year 6 (when children leave primary school). Child data is presented because good quality data can be collected for children. There is a strong relationship between the prevalence of obesity in children and adults. There is a distinct increase in overweight and obesity between these years. We see similar patterns of deprivation, child poverty, fuel poverty, high levels of diabetes, poor mental health and premature mortality in areas of higher overweight and obesity.

Being overweight or obese is inextricably linked to social determinants, food environment and physical activity environment (as well as biology). We therefore have control over the major causes and is effectively a preventable issue. Being overweight is linked to being sedentary. Research shows that those people who are physically active have better life expectancy, better quality of life, better mental health and less prevalence of lifestyle related disease and musculo-skeletal issues (mental health and musculo-skeletal issues being the two biggest causes of ESA and IB claims). Public Health Intelligence currently has physical activity data at local authority level, and so we are unable to present data specifically at sub-local authority level. However, 51% of adults in Birmingham are achieving at least 150 minutes of physical activity per week which is significantly lower than the England average (57%) (Source: Active People Survey, Sport England).

Birmingham ward map of excess weight by Reception and Year 6 (May 2015)





Is EBNS an ‘obesogenic environment?’

The term ‘obesogenic environment’ refers to the role environmental factors may play in determining both nutrition and physical activity. Environmental factors may operate by determining the availability and consumption of different foodstuffs and the levels of physical activity undertaken by populations.

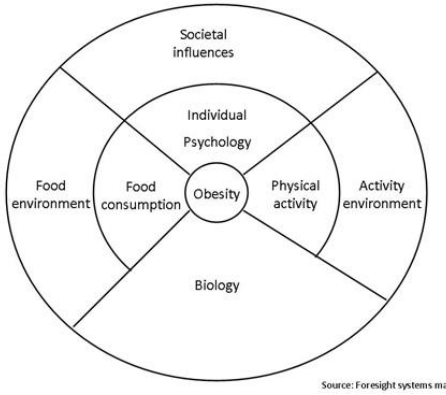
There is considerable literature on the relationship between the prevalence of hot food takeaways and diet. However, causality has not been satisfactorily proven. A literature review for the Government Office for Science (2007) found that environmental influences on diet may involve access to foods for home consumption from supermarkets, or access to takeaways and restaurants. **However, similar findings are not consistently observed elsewhere, and a recent high-quality study in the UK found no effect of the introduction of a supermarket in a deprived area.**

Other research shows that the number of takeaways in an area has an impact on obesity. Whilst there is debate on the extent of the importance of the issues (for example, whether the number of takeaways are cause of poor health, or a symptom), University of Cambridge research (2014) found that people are exposed to, on average, 32 different takeaway options each day. Cambridge study, published in the BMJ, looked at the eating habits and weight of nearly 5,500 people who took part in a lifestyle study in 2011, and compared the results to information on the number of takeaway outlets in their area. Researchers estimated grams of daily takeaway consumption based on intake of burgers, pizza, fried chicken and chips. The group of people who were most exposed to fast food options consumed on average 5.7 grams more takeaway food than the least exposed group (Independent, 2014).

Planning policy is seeking to control the number of takeaways. Birmingham City Council has limited the number of takeaway outlets to no more than 10% of units in any shopping area. Part of the justification for this policy is around town centre vitality, but part is around combating obesity (Cllr Steve Bedser, Birmingham Post, 28 March 2014). Solihull has a similar policy (P18) which ‘seeks to manage the concentration of hot food takeaways, particularly around schools, which may increase the propensity to consume unhealthy food.”

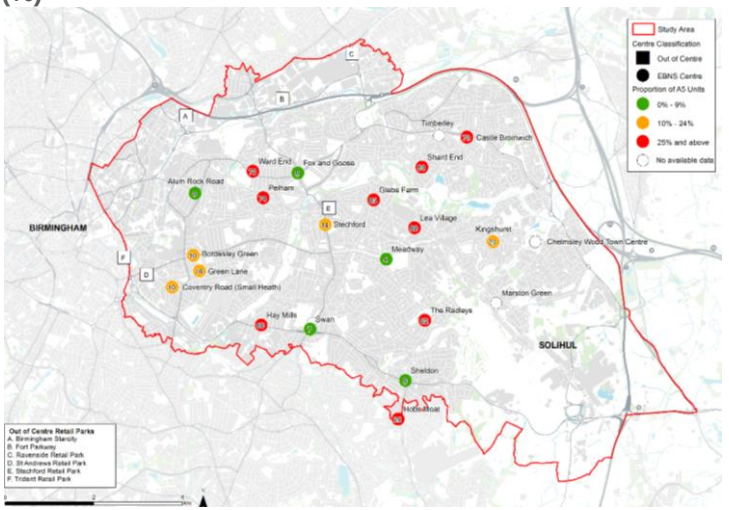
The map shows the most recently published data on the proportion of A5 uses (hot food take-aways) in EBNS centres. For Birmingham centres the map provides a snapshot of the proportion of A5 uses in 2016 and for Solihull centres the data is from 2011. The three centres with the highest proportion of A5 uses are Glebe Farm, Pelham and Timberley (Castle Bromwich Bradford Road). Nine out of 25 centres in the EBNS study area are considered to have a high proportion of A5 uses with 25% of units or more in A5 use. The centres with the lowest amount of A5 uses include Alum Rock (Saltley), Swan (Yardley) and Meadway at 8%, 7% and 4% respectively.

Obesity drivers



Source: Foresight systems map, 2007

Proportion of A5 Hot Food Takeaway uses in EBNS centres (%)



Dataset: *Table 3: Policy 4 - Percentage of Class A5 Uses Statistics 2016[1]*
Date: *2016[1] and 2011[2]*
Source: *Shopping & Local Centres Supplementary Planning Document (SPD) Monitoring Report 2016[1] and Solihull Retail Study Health Check Appendices 2011[2]*

Cross-disciplinary working with walking and cycling strategies could help both physical and mental wellbeing. The ‘last mile’ strategy is critical for the success of public transport strategies, and could have onward health benefits

A large number of studies have examined the association between environmental characteristics and physical activity. However, relatively few have analysed body mass or obesity as outcomes. The Government Office for Science literature review finds that the general picture from these projects is that residents of highly walkable neighbourhoods are more active and have slightly lower body weights than their counterparts in less walkable neighbourhoods, as do those living in areas with high land-use mix. The only UK study reviewed found that perceptions of social nuisances in the local neighbourhood increased the risks of obesity, while good access to leisure centres and living in a suburban environment reduced the risks. These effects remained after adjustment for self-reported participation in walking, sports and overall physical activity.
The Birmingham Cycle Revolution plans a cycle route through EBNS – via Castle Vale, the Fort and JLR (see the Connectivity section). Later visioning and strategy work may choose to consider whether these initiatives need expanding, particularly by providing walking and cycling connections to Metro and Sprint, with cycle parking facilities at stops.
Evidence collated for the connectivity section of this report suggested that cycling and walking strategies could be further developed.

Evidence from other cities (source: CIHT (2016) A Transport Journey to a Healthier Life

Bristol City Council’s transport and public health professionals are co -located in the same team and have a shared agenda to promote active travel and preventative approaches to health and wellbeing. Initiatives include the introduction of 20mph zones in the city and a Traffic Choices website. This uses simple language to show the effectiveness different types of road safety interventions can have on improving community involvement in local transport decision-making.

Gloucestershire NHS has published an Active Planning Toolkit that includes a scorecard to help determine the level of collaboration between public health, planning and transport planning on plans and policies.

In Birmingham, it is likely that air pollution is second only to tobacco smoke in causing premature death (deaths before the age of 75)

The JSNA Air Quality chapter reports at a city level, rather than particular areas of the urban area (such as EBNS), and finds that across Birmingham overall, based on current mortality, air pollution causes almost 900 premature deaths a year.

Air pollution has overtaken poor sanitation and a lack of drinking water to become the main environmental cause of premature death in the world and in Europe it is the single greatest environmental risk to health (JSNA Air Quality Chapter quotes OECD 2014, European Environment Agency 2015, and House of Commons. 2016).

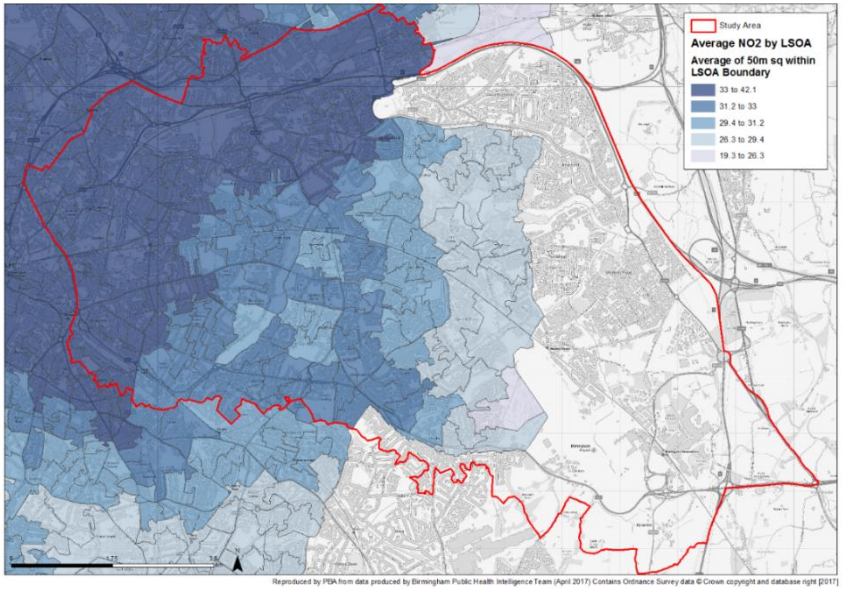
Evidence from the JSNA shows that most air pollution in urban areas comes from road transport, followed by industrial processes and some background levels caused by natural sources. The evidence states that private cars are predicted to continue to be the major source of air pollution in the city, with an projected increase in the number of trips increasing the number of trips made Monday-Friday from 3.3 million daily trips currently to 4 million trips by 2031. The JSNA states that, given that at present the majority of trips are made by private car, changes are required to mitigate the impact this might have on worsening air pollution despite efforts in place currently to reduce it.

The JSNA states that evidence suggests air pollution tends to be worse in areas where the population is more vulnerable to its effect; in Birmingham there is a steep socio-economic gradient, with approximately 75% of people in the most deprived areas being exposed to levels just below the EU threshold and none in the least deprived. This is important given that people living in poorer areas are already exposed to other risk factors that negatively impact cardiovascular and respiratory health . Also, because it is known that:

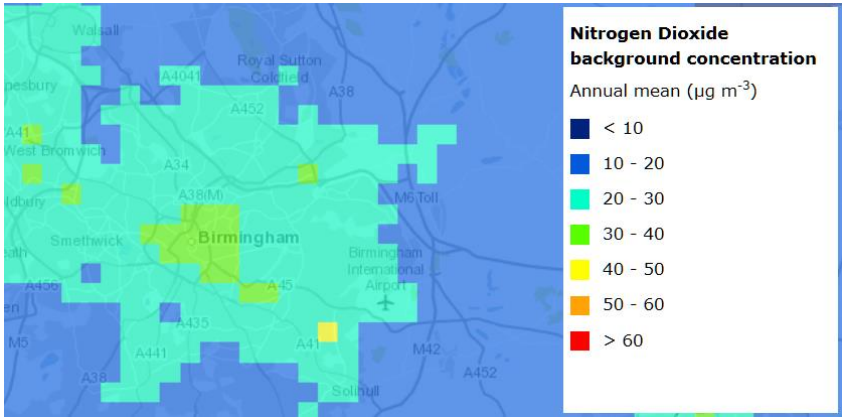
- For every 10µg/m3 increase in PM2.5 is associated with a 6% increase in all-cause mortality
- For every 10µg/m3 increase in NOx is associated with a 2.5% increase in all-cause mortality.

We understand that DEFRA will release national air quality data updates over the next few months. This will help provide a consistent EBNS picture.

Average NO2 by LSOA. Note this shows data Birmingham only



Average NO2 (wider area) covering Birmingham and Solihull



The evidence suggests that a multidisciplinary health and wellbeing theme group could be useful

Evidence from officers suggests that EBNS needs to approach health and wellbeing differently in future.

Evidence from officers suggests that a multidisciplinary health and wellbeing theme group would be welcomed as part of the EBNS development methodology. This is currently lacking. Officers state that EBNS needs multidisciplinary approaches, cross cutting themes, and a dedicated commitment to working with, and across the services that represent the wider determinants.

Evidence from officers suggests that the remit and deliverables of this group would need careful framing, and with tracking and outcome evaluation to help ensure that progress was understood, and success reinforced.

Whilst the remit of the group would need further work, the evidence in front of us suggests that there are a number of key issues which could be addressed.

- Child poverty and deprivation issues are a major driver of poor health outcomes, and need a continued focus.
- There are plainly serious difficulties with child and adult mental health, which represent a very serious long term social and economic cost to the area. Emerging approaches from Government and the West Midlands Combined Authority target this issue, and there are important implications for primary care and DWP alongside Birmingham and Solihull Councils.
- There is a need to break the inter-generational issues associated with the social and wider determinants; to ‘design in’ opportunities to move people up the social gradient, and also reduce inequality; and to create routine access and uptake of healthcare services.
- The role of exercise through extended walking and cycling strategies (which would form part of the critical ‘last mile’ approach to a public transport strategy) is also important to both physical and mental wellbeing strategies.
- The ‘classic’ public health issues also need continuing attention.
- A consolidated index which looks at health issues across EBNS would help further focus intervention.

Crime and anti-social behaviour

Key issues:

- Many important crime rates are higher than average

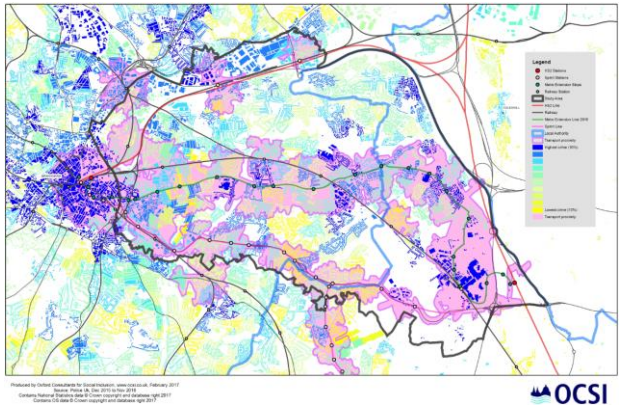
Reported instances of anti-social behaviour are lower than England, but violent/sexual offences, burglary, criminal damage and vehicle crime are higher. Reported drug crime is at the English average rate

The map shows reported levels of various types of crime in EBNS per 1,000 residents. The dark blue shows the LSOAs that rank within the highest 10% of areas in terms of crime levels. The dark blue areas are very prominent in Birmingham city centre. With drugs crime, the maps show that there are pockets of dark blue which extend eastward from the city centre into EBNS, along main roads, following the route of the Metro extension.

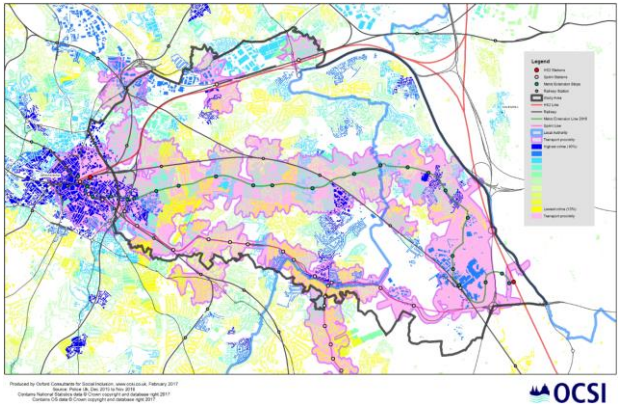
Typically, the northern area of EBNS is within the areas ranked lowest in terms of crime per 1000 residents.

Area	Anti-social behaviour	Violent/ sexual offences	Burglary	Criminal damage	Vehicle crime	Drug crime
EBNS area	20.0	17.9	16.1	9.2	9.6	1.8
Birmingham	21.0	17.5	18.6	7.9	9.8	1.8
Solihull	13.5	10.7	15.3	6.2	9.5	1.4
WMCA constit LAs	17.9	15.6	17.5	7.4	8.6	1.5
England	26.3	16.8	13.8	7.8	5.6	1.8

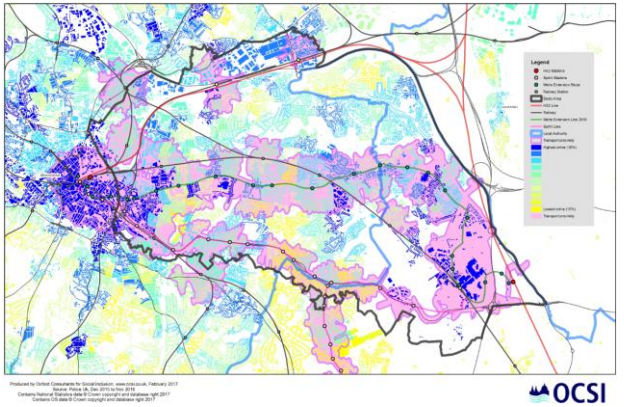
Drugs crime offences



Anti-social behaviour



Violent crime and sexual offences



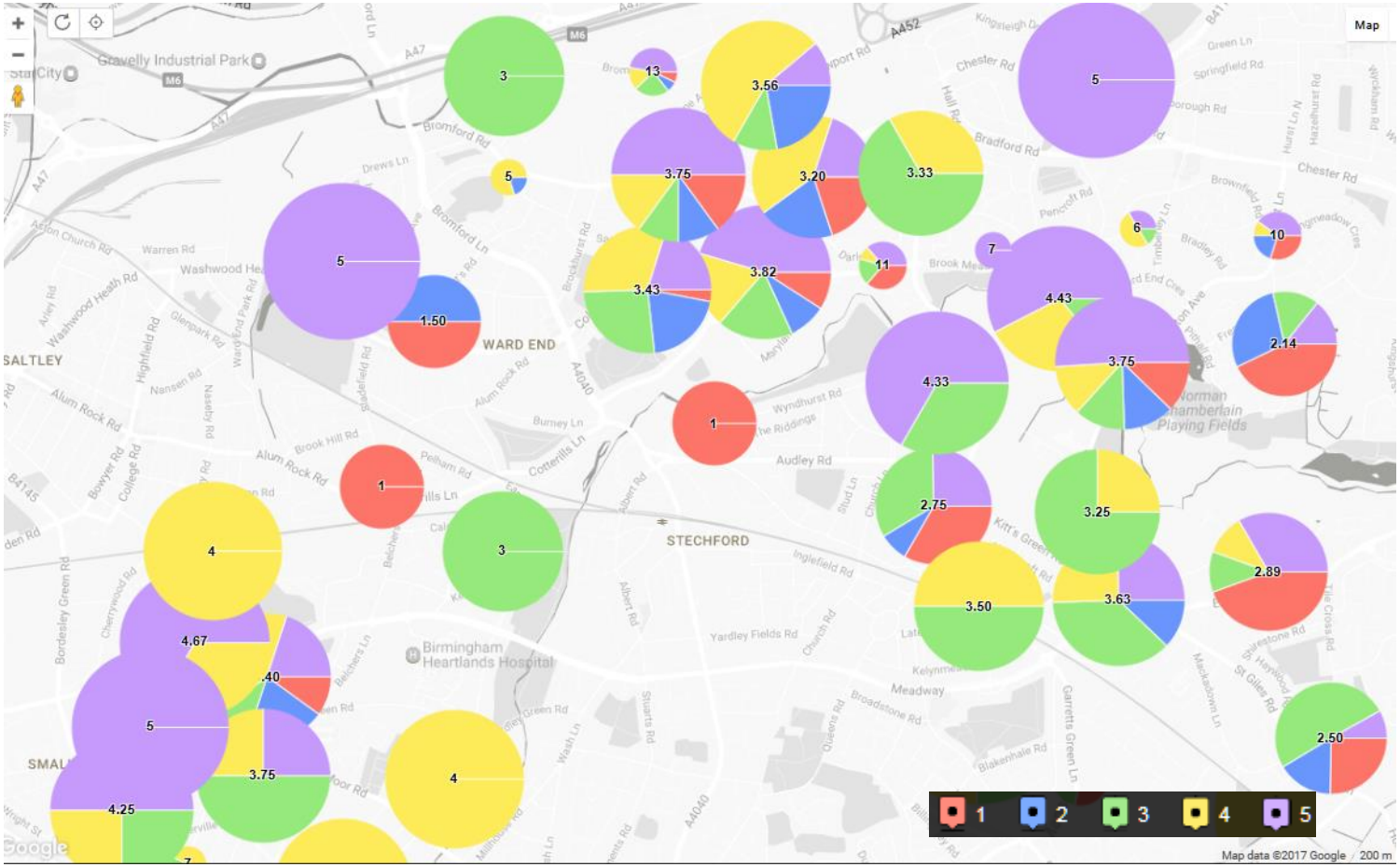
Date: Dec-2015 to Nov-2016, Source: Police UK (Police recorded crime figures)

Evidence suggests that drug use and dealing is a significant problem in the area – and that crimes might be being under-reported

A survey of constituents was undertaken by Liam Byrne MP's office in December 2016. It covered a range of issues. 700 responses were received. One question asked constituents whether drug use or dealing was a problem in their area. Residents were asked to rank the seriousness of the issue on a scale of 1 to 5, with a response of 5 indicating that the problem was severe. Constituents report that drug dealing is a highly visible problem across the areas surveyed.

We also understand that constituency casework for Liam Byrne MP (Hodge Hill) suggests that there could be a substantial under-reporting of crime in the area.

Question: are drugs a problem in your area? (area detail) (EBNS area-wide; 1 is low, 5 is high)



Source: Office of the Rt Hon Liam Byrne MP

Joining up the public estate

Key issues:

- Significant opportunities exist for innovative service delivery

Estate Reconfiguration and Rationalisation is being pursued by the NHS as part of the Sustainability and Transformation Plan. Some possible early wins are emerging

The Birmingham & Solihull NHS Sustainability and Transformation Plan (STP) has three strategic aims.

- Creating efficient organisations and infrastructure
- Transformed primary, social and community care
- Fit for future health, care and wellbeing services

STP Wide Estate Reconfiguration and Rationalisation sits under the first strategic aim of creating efficient organisations and infrastructure. The objective is to create an estate footprint that is fit for future purpose, and flexible enough to adapt to and support changes in clinical service models, without the need for additional significant capital investment. This will be achieved by:

- Initial disposal of unused, poor condition, and/or surplus estate to fund estate change programme
- Reducing the known areas of estate void (e.g. in LIFT buildings) and implementation of other innovative opportunities to repurpose existing buildings enabling the delivery of high quality place based clinical services within the natural communities
- Ongoing oversight of estate utilisation across Birmingham and Solihull and planned use on a footprint-wide basis to realise additional benefits and optimised estates utilization.

The interdependencies across the system and across the service change projects set out in the STP are complex. There are considerable organisational complexities: the Birmingham and Solihull area has six NHS providers – Birmingham Women's and Children's Hospital (BWCH); Heart England Foundation Trust (HEFT) University Hospitals Birmingham UHB, Royal Orthopaedic (ROH); and two community level providers are Birmingham Community Healthcare (BCHC) Birmingham and Solihull Mental Health Trust (BSMHT) along with 228 Primary Care providers. The STP faces significant risks to a joint estates strategy that encompasses the whole governance environment and there may be difficulties obtaining the head leases or freeholds required to make the necessary changes to estates.

Even so, the opportunity is considerable. Across the full BSol area, the estates currently comprises circa 650 buildings with 1000+ property interests. The quality of estates is variable across the footprint, a large number of poor quality buildings in Birmingham, and overstretched buildings in Solihull. The STP states that there is a clear need and opportunity to address poor quality and sub-optimal estate through a planned programme of rationalisation An initial baseline for Estates has been completed, and work continues to establish a full asset baseline and condition report for all buildings. Some progress has been made towards identifying initial quick win opportunities that will increase utilisation of modern LIFT buildings providing the potential to enhance primary care and integrated services, and enabling disposal of unused, poor condition, or surplus estate.

Surplus estate can be disposed of – possibly creating regeneration and development opportunities – alongside a capital receipt. (However, GP surgeries are frequently run from individually owned premises, meaning that no capital receipt will be available to the NHS). The future direction of NHS estates is to run health provision through corporately owned premises, and this approach allows new health provision to be co-located with other community facilities including leisure centres and schools, perhaps alongside wider quasi-health provision designed to reduce loads on clinical staff.

It is critical to ensure that the estates strategy aligns to the clinical commissioning strategy

The broad direction of clinical commissioning is that provision will increasingly be delivered through community based care, with Service Hubs delivering specialised services, in order to support local hospitals. However, there are limited capital budgets, so there is relatively little scope for new physical provision: it will broadly be a case of delivering care through existing buildings and estates, rather than sparking a major new-build programme. There is a significant amount of Department for Health, Cabinet Office, and Treasury interest in improving the relationship between clinical strategies and estate strategies, with this agenda being reinforced through Sustainability and Transformation Plans and their likely successors. However, there is at the moment a shortage of information available regarding the capacity and condition of the estate, which is currently being filled.

Officers state that the primary care estate is in a period of change and realignment. Through the Birmingham CrossCity ACE Schemes and the national direction of new care models, providers are recognising the advantages of the way that is primary care provision works together at scale to deliver services. This has resulted in a cultural shift in provision as partnerships merge and federated models evolve.

There is evidence of health providers beginning to work more effectively with other health-related providers. For example, BITA pathways and the Disability Resource Centre (charities) and DWP advisors are using space at Washwood Heath and Hodge Hill.

There are 134 NHS-commissioned buildings in the EBNS area. These cover a range of functions including Primary Care (61), Community Healthcare (51), Mental Health facilities (21) and one major acute hospital. At the time of writing, the review of the NHS estate is only around 75% complete in the EBNS area, and data needs to be reviewed and checked, but early findings shows some of the premises which might need consolidation and updating.

Analysis carried out by the STP Estates Workstream has picked up some early wins. Work shows that in Washwood Heath, £1.2m pa is being paid for rents for empty space. At Kitts Green, opportunities to run primary care provision alongside other public sector developments are being explored

Cabinet Office funding is being sought for feasibility studies to look at fixing overcapacity and quality issues in two places in EBNS: Saltley/Washwood Heath and Kitts Green.

In **Washwood Heath**, plans exist for a number of GP practices in poor quality premises to be run out of good quality under-utilised buildings, alongside other services. There are two under-used premises which can be used to run these services which are already costing the NHS money for void space. The first is at Saltley Heath (where empty space is costing c.£300k pa in rents to NHS Property Services) and the second is at Washwood Heath (where 30% of space is empty, incurring costs of c.£900k pa in rents to Community Health Partnerships). A hypothetical solution is being reviewed which could see provider level services (including urgent care centre, mental health centre) being run out of Washwood Heath LIFT building, whilst GPs could be run from Saltley health centre. The objective would be to run wellbeing services from these buildings alongside healthcare. The objective would be to intercept patients needing "social prescriptions" rather than medical prescription, so reducing GP workloads by offering touchdown space for services from DWP, housing and employment outreach. This physical provision would work in tandem with 'triage' systems currently being developed, including new artificially intelligent call handling systems currently under development.

At **Kitts Green**, Cabinet Office funding is also being sought to reconfigure the provision of NHS services. A number of GPs practices have been identified as requiring transfer to new premises.

NHS Estates providers intend to review joint working opportunities across the public sector.

Early analysis at Washwood Heath and Kitts Green can be extrapolated to indicate the level of investment needed within that natural community, and across EBNS

The data in the table to the right shows some of the early analysis that has been carried out on community facilities in Washwood Heath and Kitts Green. In the area tested, the data shows that the majority of buildings are unacceptable from a physical and functional perspective.

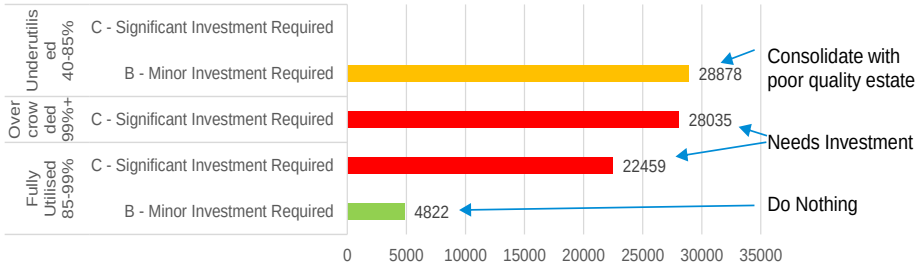
The second graphic shows the number of patients affected in Washwood Heath and Kitts Green by an estate which does not achieve a suitable utilisation of functional quality. The graphic breaks NHS community provision in Washwood Heath and Kitts Green into three categories – underutilised, overcrowded and fully utilised. Within those categories it looks at the levels of required investment, and shows the likely next steps ('consolidate with poor quality estate' – suggesting that this good quality space which has capacity to accommodate patients from poorer quality sites; 'needs investment'; and 'do nothing').

The analysis shows that 29,000 patients are served from buildings which are classed as highly underutilised yet are of good quality, and that around 50,000 people are served by buildings that are of poor quality and so need investment.

Number of Primary and Community Facilities in Target Area

	Physical Condition - Score	Functional Suitability - Score	Space Utilisation - Score
Acceptable	10	11	8
Unacceptable	14	13	16
	24	24	24
		Overcrowded	5
		Underutilised	11

Sum of patient activity by space utilisation – score



There are other initiatives in the area that may create opportunities to consolidate the NHS estate

Early evidence collated for the Birmingham and Solihull STP suggests that there are **similar opportunities available in the Bordesley Green area**, where premises can be used more efficiently, and also provide facilities which can divert demand away from A&E provision at Heartlands Hospital. The Bordesley Green AAP discusses far reaching change in the area, including new schools and community provision, which could provide new opportunities for co-located provision. These plans are at a relatively early stage, and will require continued monitoring by the CCG and stakeholders.

Regeneration masterplanning is also under way at Kingshurst, where North Solihull Partnership are currently working on the early stages of a masterplan which looks at replacing a 1950s/60 retail centre, creating further possible opportunities.

Elsewhere in this report, we have set out the possibilities at Chelmsley Wood, and there are also opportunities emerging at **Washwood Heath.**

In Birmingham, the LEA is considering releasing a series of school and playing field sites near to unsuitable primary care buildings. Early work suggests that these opportunities are available at

- Green Lane playing field
- Brocklehurst Playing Field and the Beaufort school site (although local NHS estate has capacity, which should be used before new buildings created)
- Hallmoor School site

A major investment is expected at Heartlands. A total budget of £220m capital is available, which will pay for three phases of delivery.

1) A new 'Planned Care' Building (£150m) will centralise outpatients into new building

2) Urgent Care Centre and combined A&E

3) Administration functions all being combined into one facility.

This may allow possible A&E patients to be diverted away from A&E provision, into primary care. The objective is to have the Heartlands work complete by 2025. These three projects free up space for two further onsite plans which currently have yet to obtain planning permission and allocated budget. The first project is onsite intermediation care centre intended to care for people too well to be in hospital, but not well enough to be at home; and the second project is expected to be approximately 50-100 homes. (No decision has been made about tenure or type of these homes).

There are opportunities to realign primary care provision at

- **Bordesley Green**
- **Kingshurst Parade regeneration site**
- **Chelmsley Wood**

We investigated whether there were opportunities to bring together these opportunities with DWP sites. Within the East Birmingham and North Solihull study area, DWP Job Centre Plus are located at Washwood Heath, Yardley, and Chelmsley Wood. There is also provision funded by BCC, SMBC and voluntary providers. However, there appear to be no major opportunities to bring DWP estates provision into a wider review of public sector provision in East Birmingham. After 20 years, the private finance initiative contract that covers many DWP offices is nearing an end: it will expire at the end of March 2018. In advance of this end date, the DWP estate has recently been reviewed and rationalisation has been carried out. New leases have recently been signed, meaning that fundamental provision is unlikely to change within the lease period. There is some flexibility within the lease contract, but it will be limited.

We understand, however, that there may be opportunities to deploy DWP or DWP-funded provision into community hubs or other non-traditional locations (such as health centres and schools).

More opportunities are likely to emerge as the review of NHS estates proceeds.

We can match education's list of possible estates opportunities to look at how education, NHS and wider regeneration opportunities could be joined up. New schools provision could also be included in the One Public Estate approach

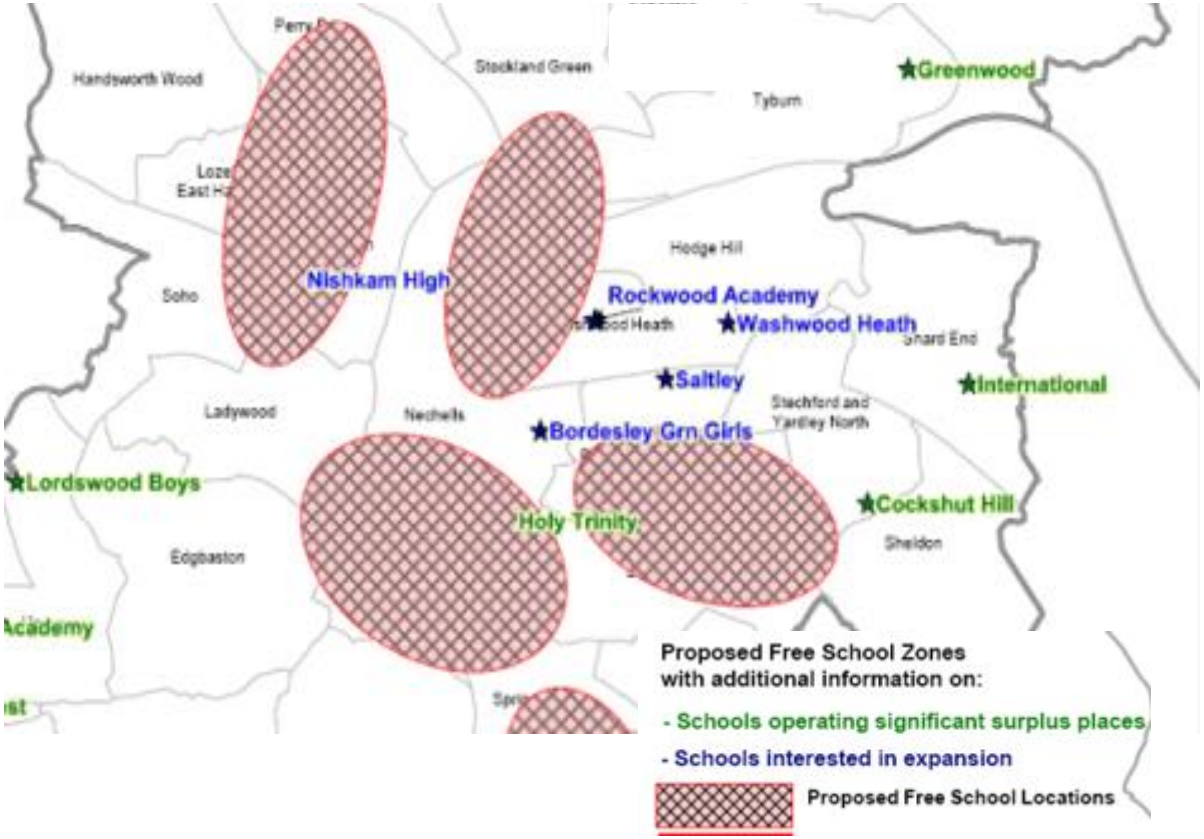
NHS estates regeneration strategies are not yet complete, but work is ongoing which looks at identifying which surgeries are moving, relocating, having an unsustainably small list size, or being disposed of. We stress that this review process is not complete – but it gives an initial outline of where the NHS estate will be changing, and so shows where some of the early opportunities to join up provision might lie.

Meanwhile, BCC Education have also set out new secondary requirements to 2019. High level estimates suggests that there is a requirement for

- 5 x 6-8FE New Schools to 2019 : optimum location is shown on the map to the right
- Up to 20FE provided within existing schools to complement to 2019
- Potential bulge expansions in years 8 and 9 as cohorts move through.

Evidence suggests that if these workstreams were put together, we might be able to identify valuable co-location opportunities. With skilful design, new schools could accommodate health, community, sports, and adult learning provision. Cross-silo working parties are likely to be needed to look at the opportunities. Opportunities will need to be revisited as the work proceeds.

Proposed school expansions and free school locations, also showing schools with surplus places



Source: BCC

Connectivity

Key issues:

- The future will see several high quality transport corridors through the EBNS area, bringing useful labour market effects
- Further ‘last mile’ walking and cycling could improve connectivity to new investment and create health and wellbeing benefits
- Not everywhere is better connected - new bus routes could be useful
- Further innovations could be explored – perhaps including park and ride at Metro stops and upgraded train stations

What does the evidence say about the economic impact of connectivity?

Transport creates productivity improvements from better connections to labour and product markets, and through agglomeration economies.

- In the labour market, the transport system is a key factor in making labour accessible to firms. The effective labour market for any company is extended by good transport, which enables companies to be within reach of a larger labour pool within any given commuting time.
- In product markets, transport allows customers to be reached at lower cost. The transport investments networks being contemplated for EBNS are unlikely to have strong product market effects, because trains, buses and metro links are unlikely to be used to deliver goods to customers (although there could be effects on moving business people to client locations).
- Agglomeration economies occur when individuals and firms benefit from being near to others. Being close to other individuals and firm creates 'knowledge spillovers'. Agglomeration effects are likely to arise from EBNS transport investment, but they are likely to arise in central Birmingham and the UK Central area rather than within the immediate EBNS area.

We say more about the effects of transport investment on site development viability and health and wellbeing in a later section of this report.

The area's road infrastructure is highly congested. Road capacity is going to need to move from cars to public transport

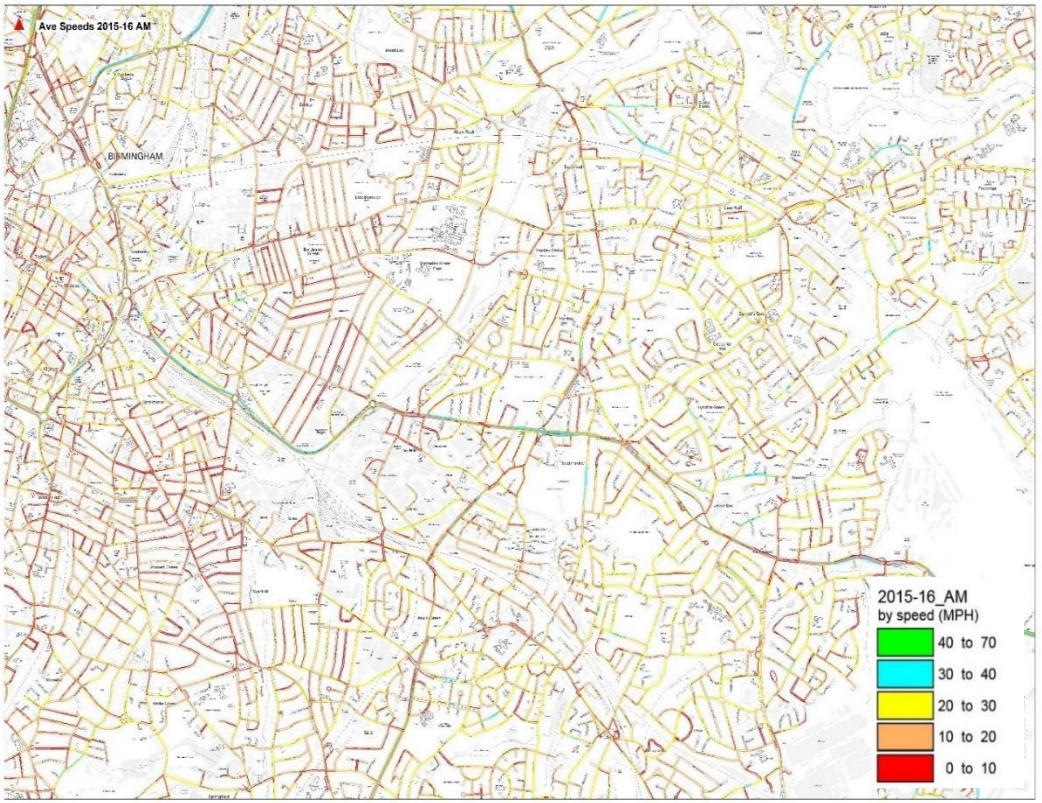
The area's road infrastructure is highly congested, with Birmingham having an average "A" road speed of just 18.6 mph which affects both bus and car travel times. This is illustrated in the average peak road speed map to the right.

The strategy document *Movement for Growth - The West Midlands Strategic Transport Plan* (WMCA) reports that travel demand is forecast to increase by 22% over the next twenty years, due to increased population and higher employment levels. Combined with a long term trend for longer journeys, particularly for work, gives a 34% forecast increase in the number of car kilometres travelled. The *Birmingham Connected* White Paper (2014) states that 'currently many people feel that they have no real alternative to driving their car.'

BCC is addressing this issue by looking at transport space allocation, which looks at the allocation of road space between competing uses, with a greater emphasis on the functions of place and people.

The West Midlands Combined Authority's HS2 Connectivity Programme aims to ensure the benefits from HS2 are spread as far as possible across the region, enabling existing businesses to expand and providing opportunities for new businesses. The Connectivity Programme 'puts the public transport user first and will deliver the connectivity that people and businesses require allowing them to travel across the city and the wider area in high quality vehicles, feeling safe and secure and at busy times faster than they could by car'. (2015,6)

Average road speed 08:00 - 09:00 (2015-16)



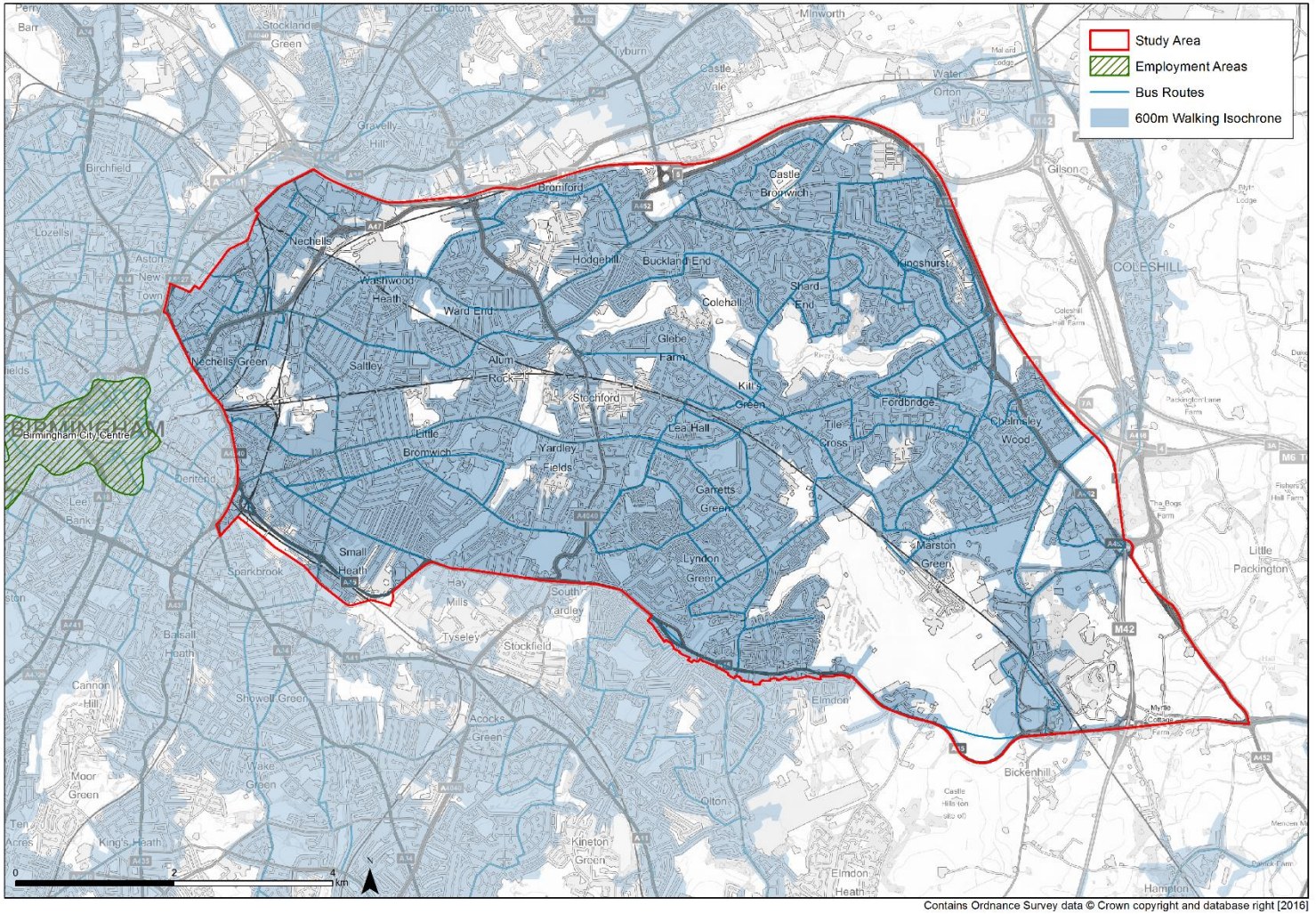
Dataset: *Shows the average road speed between 8-9am in 2015/16.*
Date: *2015/16*
Source: *PBA*

Area	Average A Road speed
Birmingham LA	18.6
Solihull LA	29.9
Combined authorities	20.4
England	25.2

There are very few gaps in the bus service: most places are within 6 minutes walk of a bus stop

The map shows the areas within 6 minutes walk of a direct bus to Birmingham city centre. It can be seen that most areas can access the city centre. However, many areas are reliant on services which stop frequently and take convoluted routes in order to serve the areas.

Areas with a bus within 6 minute walk of a bus to the city centre



Contains Ordnance Survey data © Crown copyright and database right [2016]

Dataset: *Shows the areas in EBNS within a 6 minute walk of a bus to the city centre.*
Date: *2015/16*
Source: *PBA*

East/west ‘radial’ routes into the city centre are slow (Chelmsley Wood to city centre is 46 mins), but at least they are direct. Routes to other job locations frequently require changes of service, which further lengthens journey times and reduces passenger willingness to use public transport

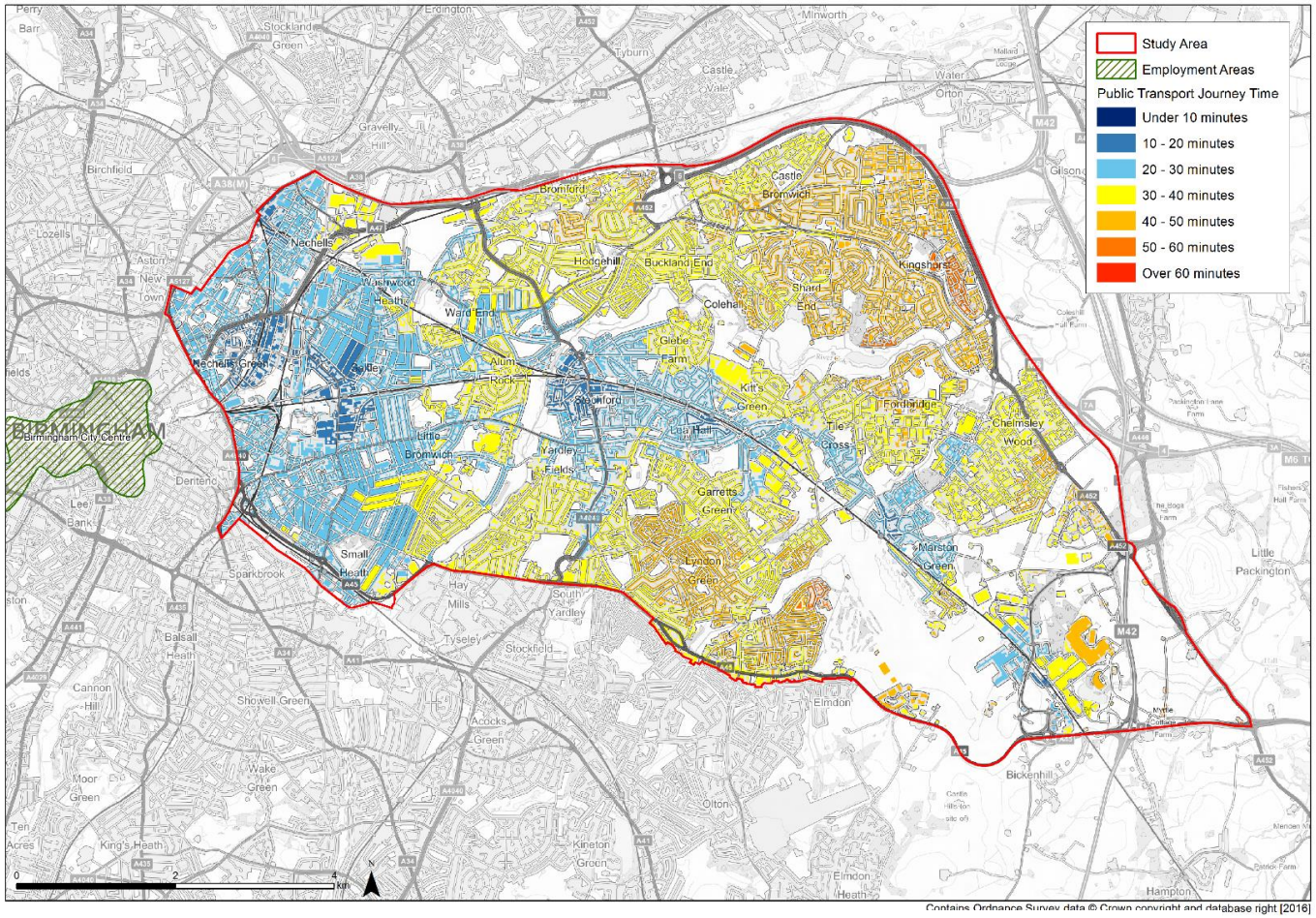
The map illustrates that the journey time of public transport users travelling into the city centre varies widely within the EBNS area, with some journeys taking nearly an hour, and relying on interchange between services or between bus and train.

There are numerous direct services into Birmingham city centre from across EBNS, but peak period journey times are high. For example, travel from Chelmsley Wood to the city centre takes 46 minutes, for a journey of 8 miles. This is no faster than an average person on a bicycle could achieve (10mph).

Whilst measures such as SWIFT cards allowing use of bus, metro or rail and some real time information are in place, the level of service frequency is limited in some areas to two buses per hour, and linkages between infrequent services stand as a considerable barrier both in terms of journey time, but also in respect of public perception of service reliability.

The result of the above factors is that the network is broad but often limited, and therefore less attractive as a commuting journey for public transport users who will want a reliable and simple journey as far as possible for regular journeys such as to work.

Travel time to Birmingham city centre



Contains Ordnance Survey data © Crown copyright and database right [2016]

Dataset: *Shows the public transport travel time to the city centre from areas in EBNS*
Date: *2015/16*
Source: *PBA*

Non-radial (north/south) public transport journeys are frequently complex, often a result of pinch points on the system. Interchanges between bus routes increase journey times and reduce passenger willingness to use services

The map shows the bus network map with major service corridors in dark blue and minor routes in light blue, demonstrating the point that main routes are radial and coverage is filled in with less direct minor services across most of the area.

Changes of service (for example, from one bus route to another) are frequently necessary if a non-radial journey is taken. However, changing services substantially reduces passenger willingness to make these journeys. Morris et al note in their paper on Transport Interchange for the Association for European Transport (2006)

"Journeys which involve interchange represent the area of travel by public transport where the greatest number of barriers exist that prohibit service contemplation and use. Public transport users perceive interchange in terms of how they make choices and trade-offs in travel cost and time, and the influence particular interchange attributes may have over these travel choices (SECRU, 2001). The significance of a high quality interchange environment in achieving an integrated public transport system conducive to the development of 'seamless' public transport journeys is therefore paramount. "

Bus network plan (National Express)

Dataset: *Shows the local bus network serving EBNS*
Date: *2015/16*
Source: *National Express*

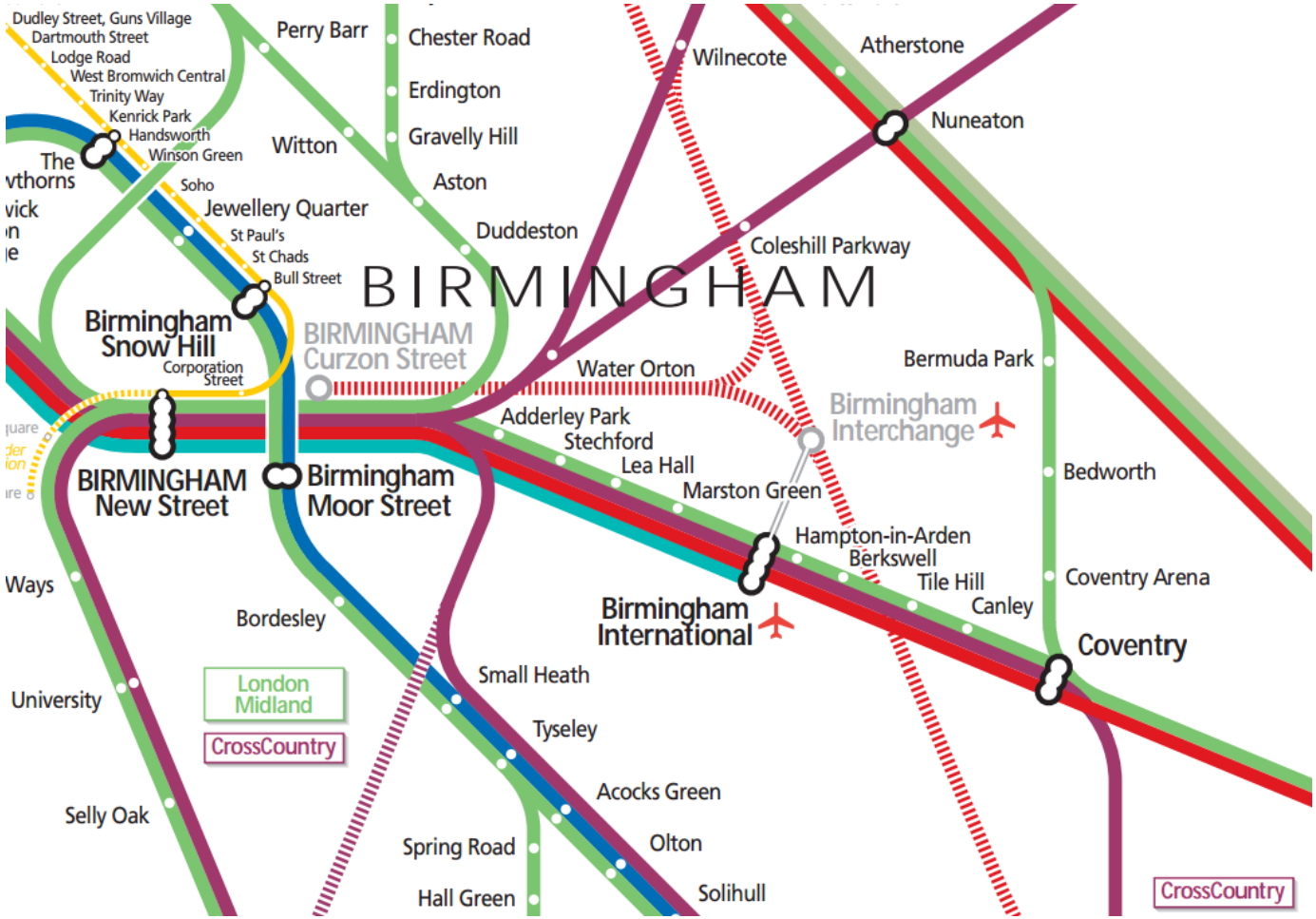
A heavy rail network is in place, but is dominated by long distance services on the West Coast Mainline rather than local stopping services

The existing rail network is focused on serving Birmingham city centre. The only services which serve stations in EBNS are Virgin West Coast, London Midland, Cross Country and Arriva Trains Wales. The dashed red line on the map is the proposed HS2 route. Therefore at present the EBNS area remains poorly connected with regards to rail transportation.

Adderley Park station, for example, is only 5 minutes to New Street station – but only has one direct service per hour. There is a similar – though not quite so poor - situation for Stechford (two direct services hourly), Lea Hall (two direct services hourly) and Marston Green (three direct services hourly).

The Birmingham-Tamworth line, which runs along the northern boundary of the study area, currently has no stops within the study area.

Rail network



Dataset: *Shows the rail network that serves EBNS and the surrounding area*
Date: *2015/16*
Source: *National Rail*

Service configurations on the existing rail network undermines the use of the facilities for local people, but this is not shown by traditional accessibility assessments. We have therefore used PTAL to better illustrate this point

PTAL (Public Transport Accessibility Level) is a measure of connectivity by public transport, which has been used in various planning processes in London for many years. For any selected place, PTAL suggests how well the place is connected to public transport services. It does not cover trips by car. PTAL values range from zero to six, where the highest value represents the best connectivity. A location will have a higher PTAL if:

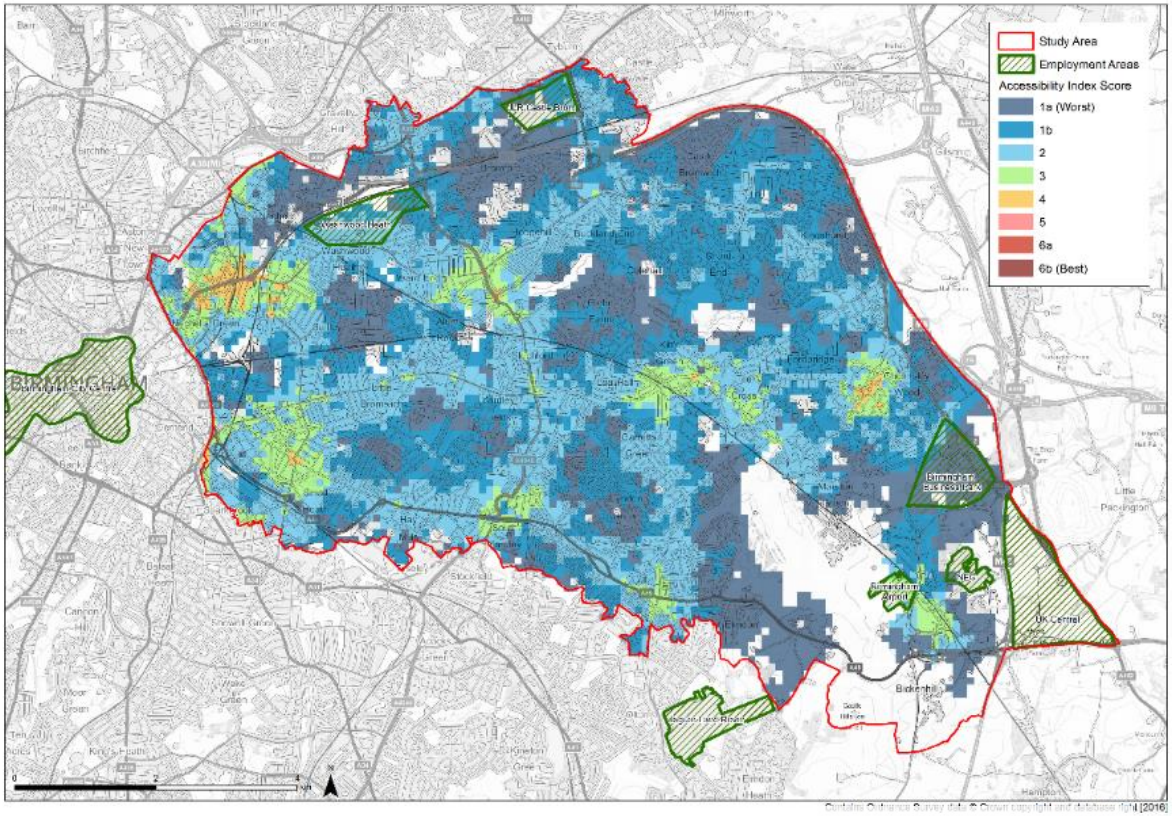
- It is at a short walking distance to the nearest stations or stops
- Waiting times at the nearest stations or stops are short
- More services pass at the nearest stations or stops
- There are major rail stations nearby.

PTAL scoring provides a useful way to understand the number of transport options and the quality of those options in an area, irrespective of if they go to a desired destination for a particular individual. In that sense it is a measurement of the area connectivity in general rather than specific terms, and provides us with an overview of the level of confidence that people within an area are likely to have in public transport local to them and the opportunities it provides.

The map illustrates that large areas are within the “very poor” (blue) or “poor” (light blue) bands of PTAL scores with isolated pockets of moderate (green) to good (yellow) network quality where rail stations are collocated with bus services.

As Birmingham does not have an underground network in addition to other modes, it is impossible for a score of 6 (best) to be achieved, and scores consequently range between 1 (very poor), and 5 (very good).

Current PTAL score – network quality (blue is worst network quality, orange/red are best)



Dataset: *Shows the PTAL distribution in EBNS before planned improvements to the public transport network.*
Date: *2015/16*
Source: *PBA*

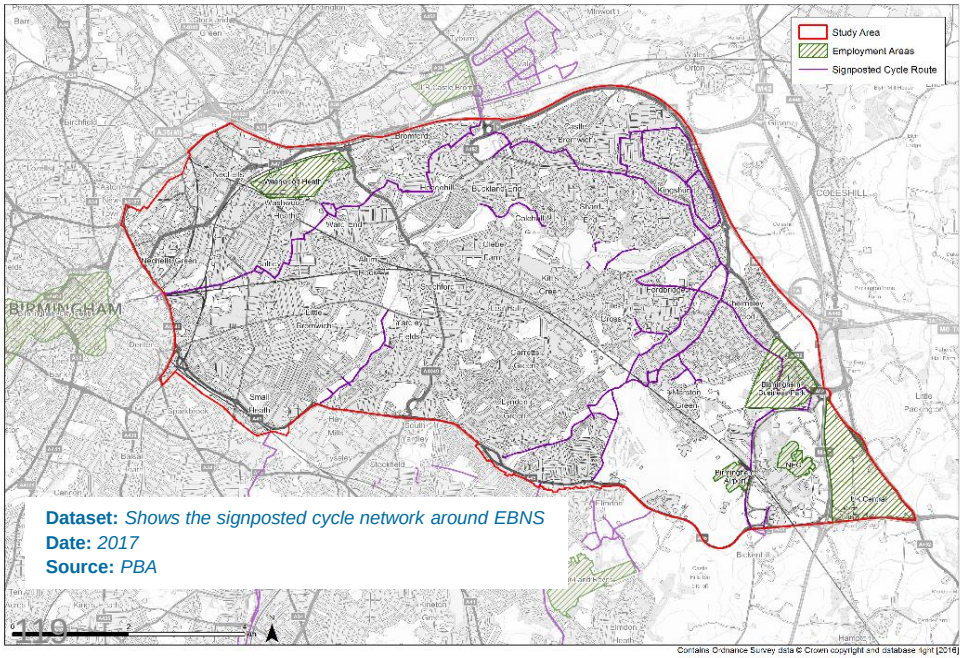
The Birmingham Cycle Revolution project is aiming to make cycling an everyday way to travel. In EBNS, cycling improvements are planned. But for now, cycle routes within and through the study area are relatively fragmented and underdeveloped

As the map shows, there are a number of cycling routes signposted throughout the EBNS area. A cycling route is present along the River Cole, but the connections to employment locations appear poor, and the issues with travel westwards into the city centre due to poor accesses onto the road network make it less attractive than cycling along other routes.

The relatively poor cycling environment may contribute to Birmingham being ranked 48th of 63 UK cities by the Centre for Cities for number of people choosing to commute to work via cycling (Centre for Cities, accessed 2017.

Later visioning and strategy work may choose to consider whether these initiatives need expanding, particularly by providing walking and cycling connections to Metro and Sprint, with cycle parking facilities at stops.

Existing signposted cycle routes



BCC's Birmingham Cycle Revolution project is aiming to make cycling an everyday way to travel in Birmingham over the next 20 years. The aim is to ensure that 5% of all trips in the city are made by bike by 2023 and to double this to 10% by 2033.

An existing programme of improvements is currently being delivered elsewhere in Birmingham. Starting in July 2017, works will begin to deliver physically separated cycling routes from the City Centre to Selly Oak. For EBNS, Coventry Road (A45) may be suitable for similar treatment in future, but officers note that it can be difficult to insert dedicated cycling road space in some areas.

New cycle routes are planned for EBNS. These include a route from the River Cole to Castle Bromwich via Chester Road, and a route through Sheldon Country Park to the Grand Union Canal in South Yardley. There are also identified needs for a route under the WCML viaduct at Stechford and a need for a bridge over the Grand Union Canal at the Ackers, Small Heath.

A new BCC cycling and walking strategy is currently under development. New Government guidance has been produced, and the expectation is that BCC will use this guidance (and the accompanying Route Selection Tool) to develop cycling plans. These tools will pick up current major commuter flows in the city, but might not successfully pick up links to *future* public transport schemes, so the methodologies used will need to be kept under review if new projects are to reinforce Metro, Sprint and rail investment.

Severance negatively impacts connectivity in EBNS and creates pinch points, particularly for north/south journeys – which also affects local access to new transport infrastructure

The River Cole, the M6 and railway lines create barriers to accessing public transport routes. These lines of severance are shown in red in the map.
Major pinch points are found at

- Saltley Viaduct
- Bromford Gyratory
- Aston Church Road
- Chester Road

Walking routes to current and future public transport infrastructure as part of longer journeys are affected by severance limiting route options and perceptions of safety in some locations. These lines of severance will also affect access to proposed new transport infrastructure.
Generally, improvements to walking infrastructure would make these lines of severance less prominent, through new and improved pedestrian crossings. Furthermore, improved wayfinding facilities, such as lighting and signage would be welcomed on off-road routes such as Elmdon Park.
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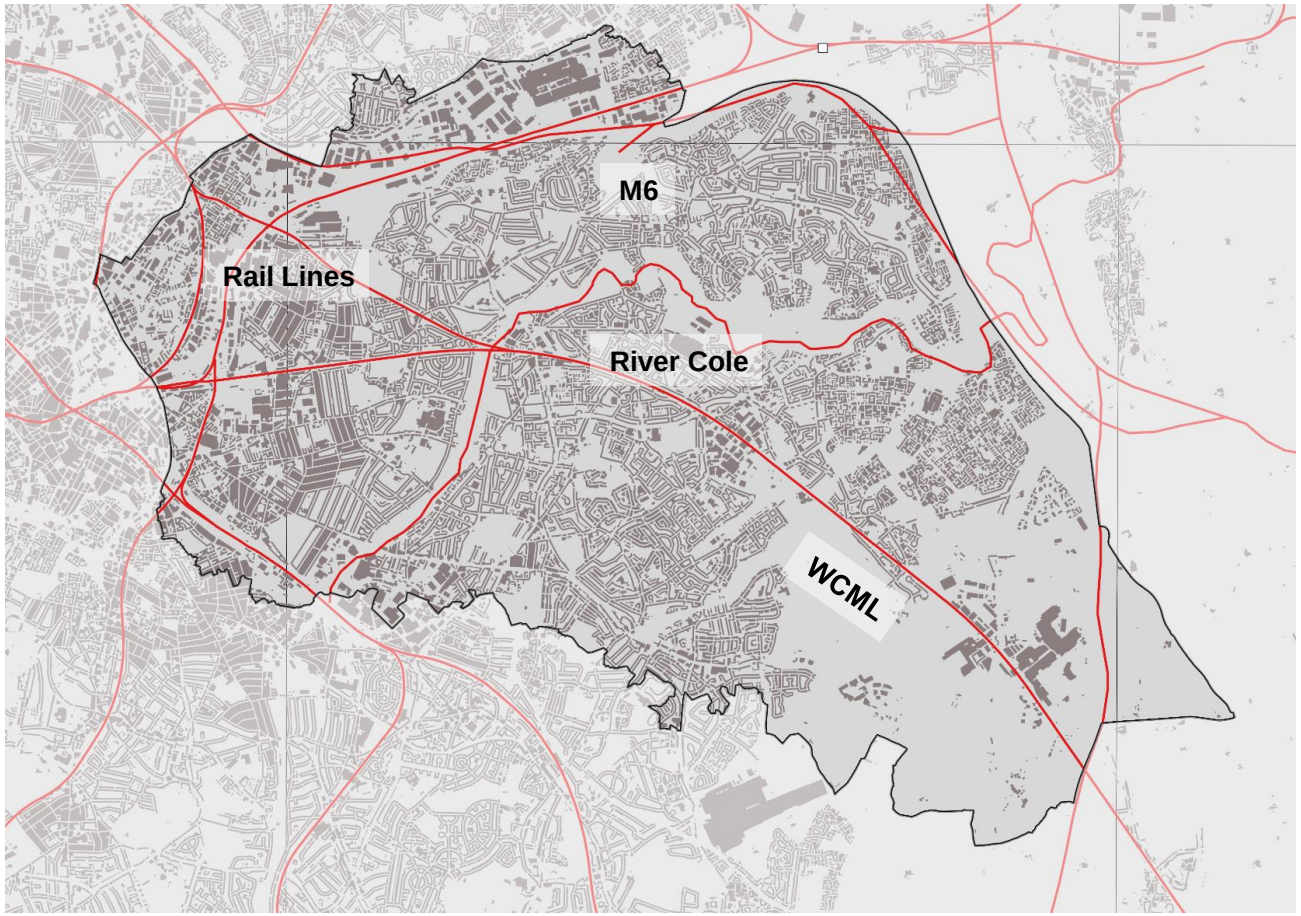
Lines of severance



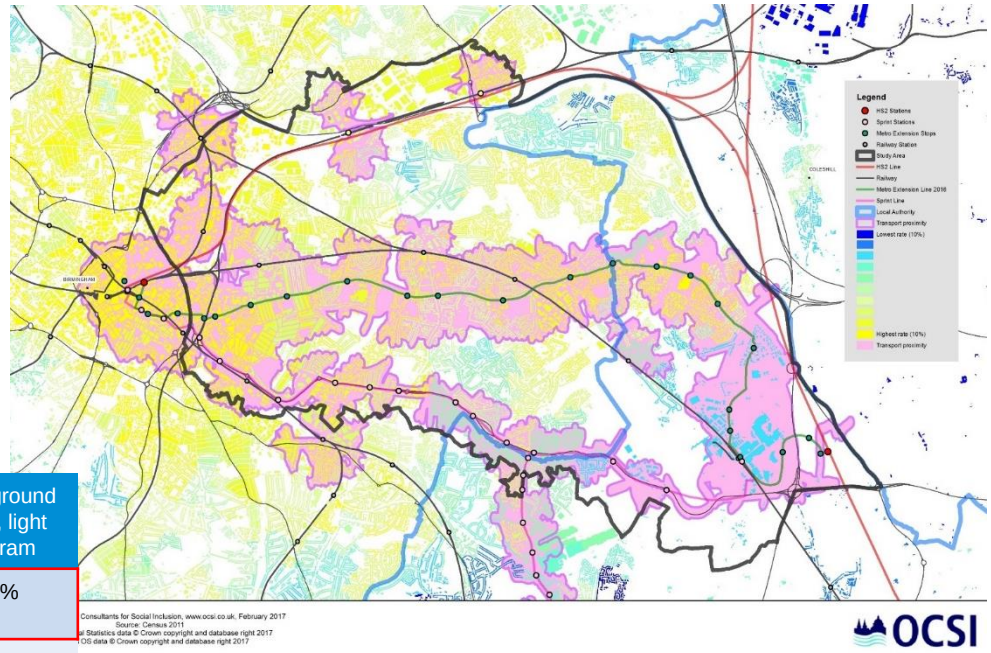
Dataset: *Shows the lines of severance in EBNS*
Date: *2017*
Source: *PBA*

The EBNS area has low levels of car ownership compared to other areas, suggesting that local people are more dependant on public transport provision than other areas. This creates an opportunity for future delivery of public transport improvements

The low levels of car ownership reflect the lower levels of economic activity and unemployment and consequently reduced average incomes present in the EBNS area when compared to surrounding areas such as Solihull and parts of Birmingham city centre.

Research states that:
"Transport can be a major barrier to accessing employment opportunities. People who are unemployed are less likely to own a car and to be reliant on public transport. Therefore, the connectivity provided by the public transport network and the cost of using it will be a major influence on a person's ability to access a job."
People are more likely to use buses and less likely to use trains to travel to work than comparator areas – likely because rail does not penetrate the area effectively

Households with no car or van (by decile)



Area	Households with no car
EBNS study area	38.1%
Birmingham LA	35.8%
Solihull LA	19.7%
WMCA constit LAs	31.5%
England	25.8%

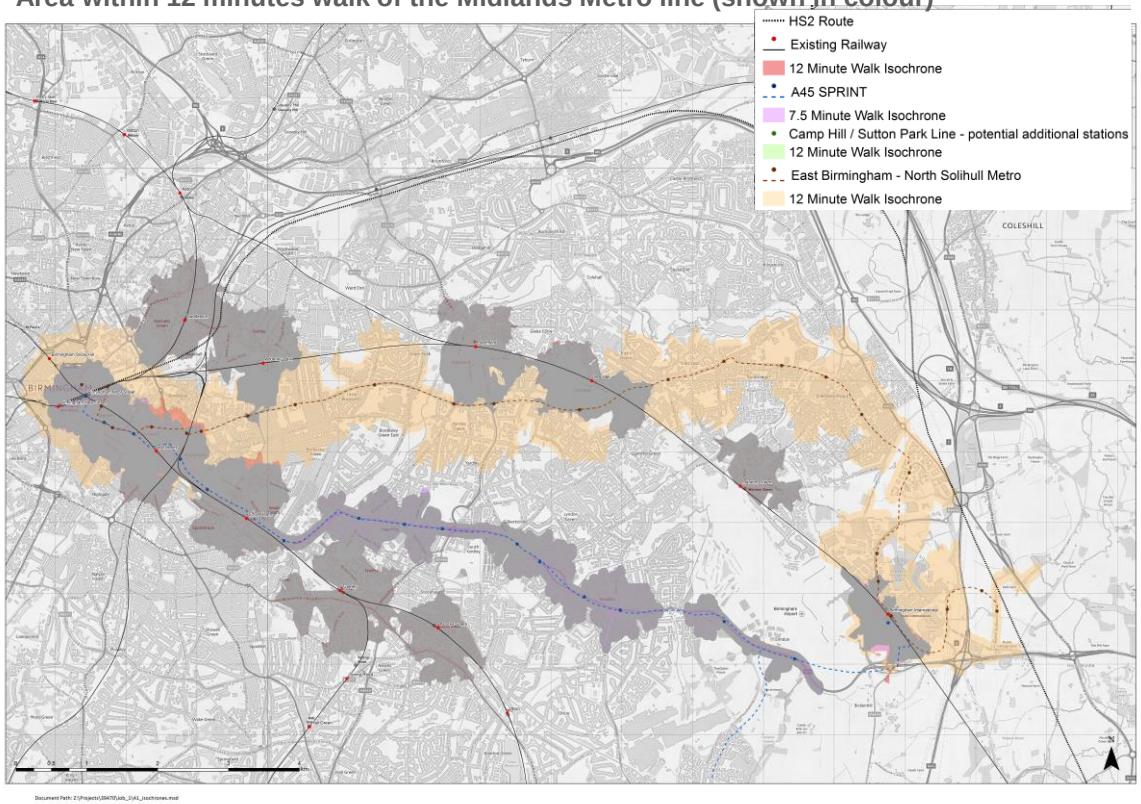
Area	Bus, minibus or coach	Train	Underground metro, light rail, tram
EBNS study area	10%	1.2%	0.1%
Birmingham LA	9.6%	2.6%	0.2%
Solihull LA	5.4%	3.6%	0.1%
WMCA constit LAs	7.6%	2.1%	0.3%
England	4.9%	3.5%	2.6%

Dataset: *The proportion of households who do not have access to a car or van.*
Date: *2011*
Source: *Census 2011*

Dataset: *The proportion of the usual resident population aged 16-74 travelling to work by underground, metro, light rail, tram, train, bus, minibus or coach. Based on the Census 2011 means of travel to work question. The means of travel to work is that used for the longest part, by distance, of the usual journey to work.*
Date: *2011*
Source: *Census 2011*

An extensive transport investment programme is planned. Plans exist for a Metro extension through the core of the EBNS area, linking Birmingham city centre to the Airport, Birmingham International Station/ NEC and HS2. The extension will reduce travel time from Stechford to the city centre by 50 % / Airport by 60%

Area within 12 minutes walk of the Midlands Metro line (shown in colour)



Dataset: *The map shows the area within a 12 minutes walk of the Midlands Metro Line*
Date: *2017*
Source: *PBA*

Midland Metro Alliance is a team of planning, design and construction specialists responsible for building a number of new tram extensions over the coming decade on behalf of the West Midlands Combined Authority. With regard to the East Birmingham-Solihull Line they state:

"The extension of the Midland Metro from Digbeth to East Birmingham-Solihull will play a key role in delivering the full potential for growth and jobs of HS2 and provide transformational benefits to areas of economic and social deprivation by giving people access to jobs and services, linked to the Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) training and skills agenda.

*The 16km extension will link growing residential areas and key destinations such as: Heartlands Hospital with existing and new growth areas including Curzon HS2, Birmingham city centre office and retail districts, Paradise Circus/Arena Central developments and Brindley Place/Five Ways/Edgbaston to the west, and the NEC/Airport and UK Central to the east. (*Midlands Metro Alliance, 2017)"

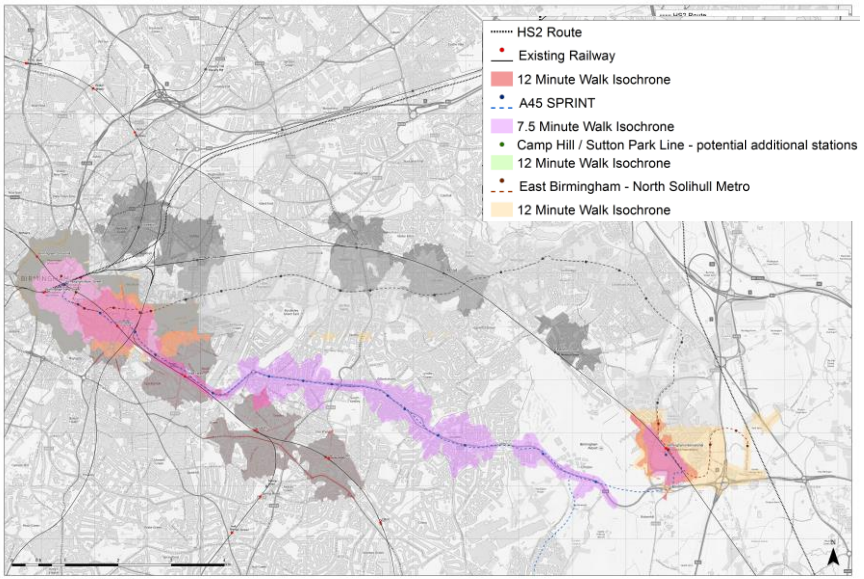
Approximately 31,000 people within the EBNS area live within 12 minutes walk of a stop along the proposed Midlands Metro extension to Birmingham Airport. The maximum journey time saving for passengers is approximately 15 minutes (for people in Stechford) compared to existing bus services running in the area (97A).

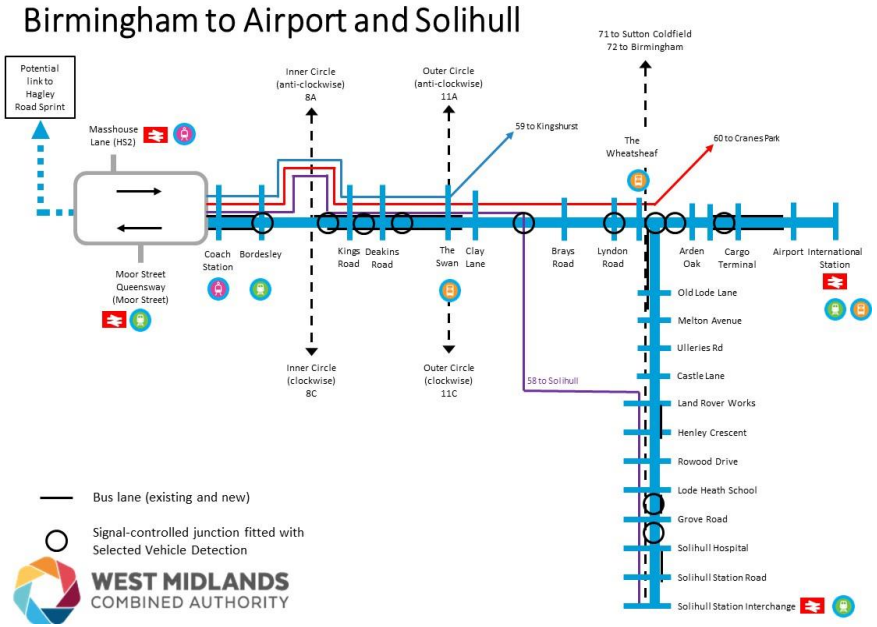
Plans exist for a SPRINT bus rapid transit system through the south of the EBNS area. This will incorporate limited stops to cut journey times, and link Birmingham to the Airport and Birmingham International Station

SPRINT is a rapid bus transit system. A route is proposed along the A45 to connect Birmingham city centre and Birmingham International Airport/ NEC; this improves the options to travel by public transport in the southern extents of the EBNS, decreasing travel times to the airport and providing greater reliability and frequency along this route including to JLR (Lode Lane) and Solihull

The A45 Birmingham to Airport Sprint transport scheme is promoted by Transport for West Midlands in partnership with Birmingham City and Solihull Metropolitan Borough Councils. Research suggests that bus users are willing to walk around 7.5 minutes to stops – suggesting an effective market of approximately 28,900 people who live within this walktime (600m) of stops, and improve links between Birmingham Airport, the NEC, Solihull and east Birmingham and the Enterprise Zone sites and wider transport links in the city centre (including HS2 when constructed).

Area within 7.5 minutes walk of the SPRINT Routes





Plans exist to improve rail service frequencies. As part of the HS2 connectivity package, there will be 50% increase in stopping train services at stations between the city centre and Birmingham International rail station

HS2 will release capacity on the classic rail network. The restoration of the Inter City service to a standard 30 minute pattern releases additional capacity, facilitates more cross-Birmingham links to the Black Country (including both inter city London services continuing beyond Birmingham doubling the service frequency to Sandwell & Dudley and Wolverhampton), retains a half hourly fast (60 minute) London service from Coventry calling at Milton Keynes (doubling service frequency from West Mids) and, alternately, at Rugby or Watford.

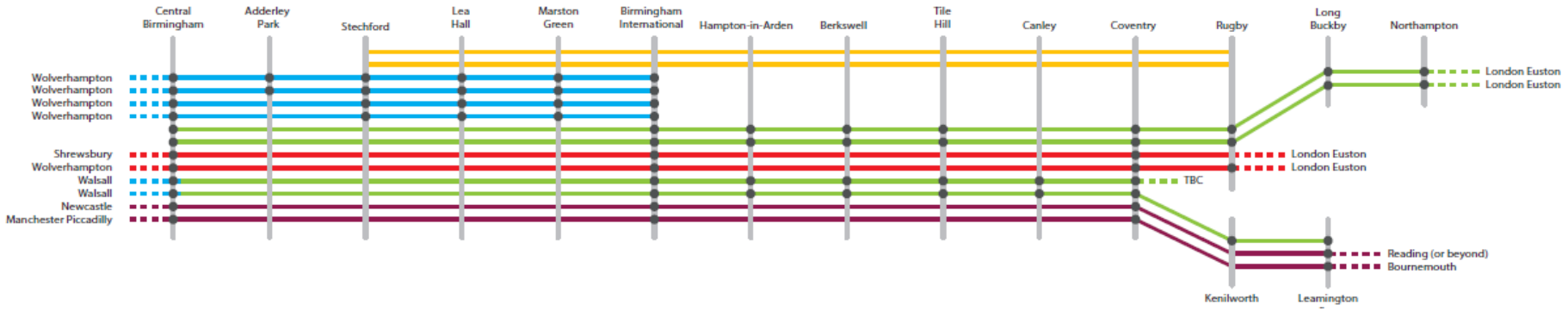
The stations which serve the EBNS area will experience a 50% increase in stopping train services. Specifically stopping train services at Adderley Park, Lea Hall and Stechford will increase by 100%, and Marston Green and Birmingham International increase by 33%.

Overall there is expected to be a very slight (1-2 minute) slowing in journey time for Inter city services between New St and International, which enables the service frequency to increase as follows:

- New St and International 9 passenger trains per hour to 12 trains per hour
- New St and Coventry 7 passenger trains per hour to 8 trains

There will also be improvements to journeys to Northampton/ Rugby and Coventry.

As with other public transport network enhancements the improvements will require promotion and public information to maximise the benefits to EBNS residents. In particular, those who do not currently use the rail network may be unaware of current frequencies or available destinations, and publicity at stations will not reach such potential users who may be more able to connect to employment opportunities as a result.



Plans exist for new rail stations in the north of the EBNS area. Transport for West Midlands is looking to open stations at The Fort and Castle Vale as part of the Birmingham-Tamworth line improvements

New stations at the Fort and Castle Vale are due to be open by 2020. These increase accessibility to the city centre by rail from the north, as well as linking to JLR Castle Vale and the proposed HS2 depot at Washwood Heath. The stations have a funding allocation through the devolution deal and the Combined Authority.

At the moment, the Water Orton corridor shown takes longer distance services to Stansted, Nottingham and Derby. West Mids authorities are seeking dedicated local rails services which connect Birmingham to Derby, and possibly Nuneaton. However, accommodating these services requires the delivery of a series of accompanying projects. These are being proposed by Network Rail on behalf of Midlands Connect, and form part of the 'Midlands Rail hub' concept. Midlands Connect is currently developing a Strategic Outline Case (SOC) for the following proposals.

- Two new platforms at Moor St Station
- Provision of sidings at Snow Hill (to create capacity at Moor St)
- Providing access to Moor St Station and sidings via the Bordesley Chords project (also known as the Camp Hill Chords)
- Track remodelling at Water Orton

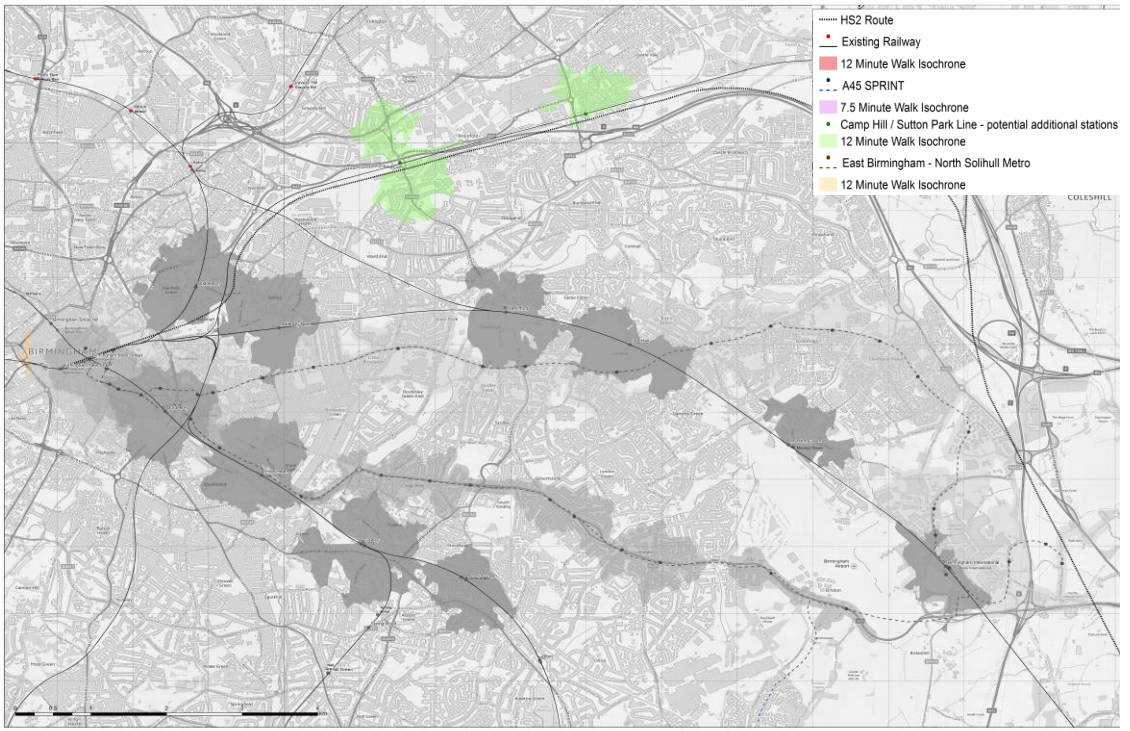
The map shows the areas within 12 minutes walk of the proposed stations, which contains approximately 2,300 people.

The station concepts are currently undergoing the business case development.

Integration of ticketing and networks to enable easy interchange between the available modes will be required to spread the benefits of the improved services as widely as possible.

Further proposals post 2026 see the extension of services to Sutton on the 'Sutton Park line'.

Area within 12 minutes walk of the proposed stations (shown in colour)

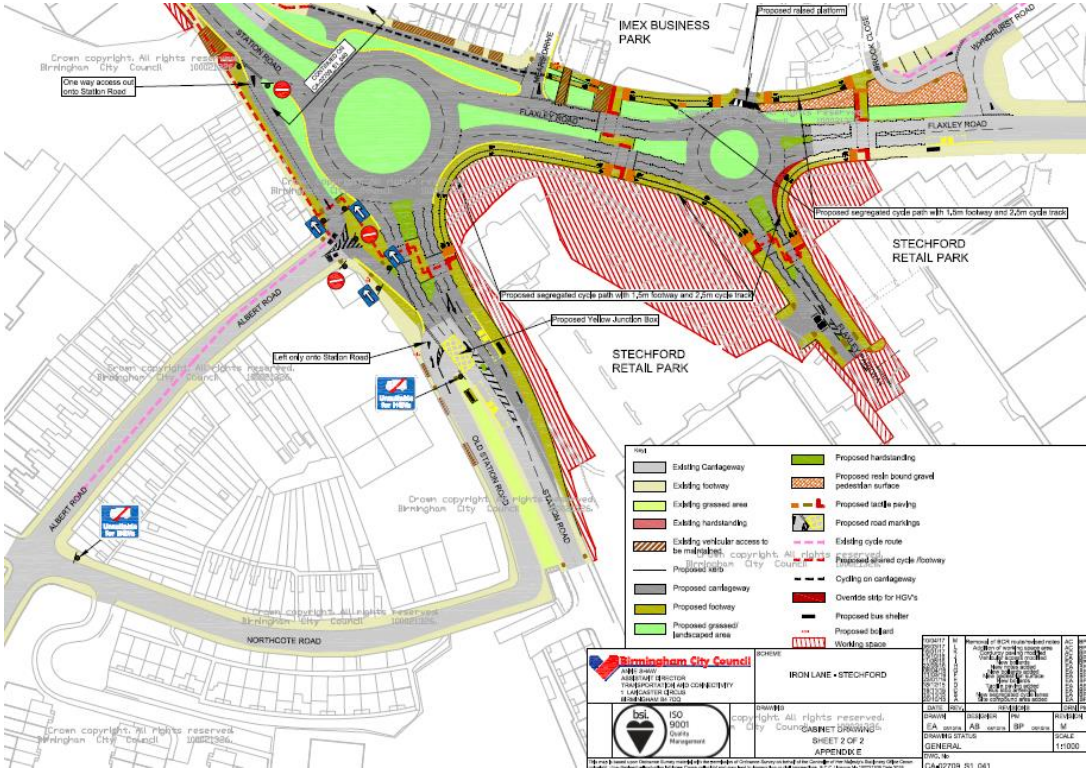


Dataset: *The map shows the area within a 12 minutes walk of the proposed rail stations*
Date: *2017*
Source: *PBA*

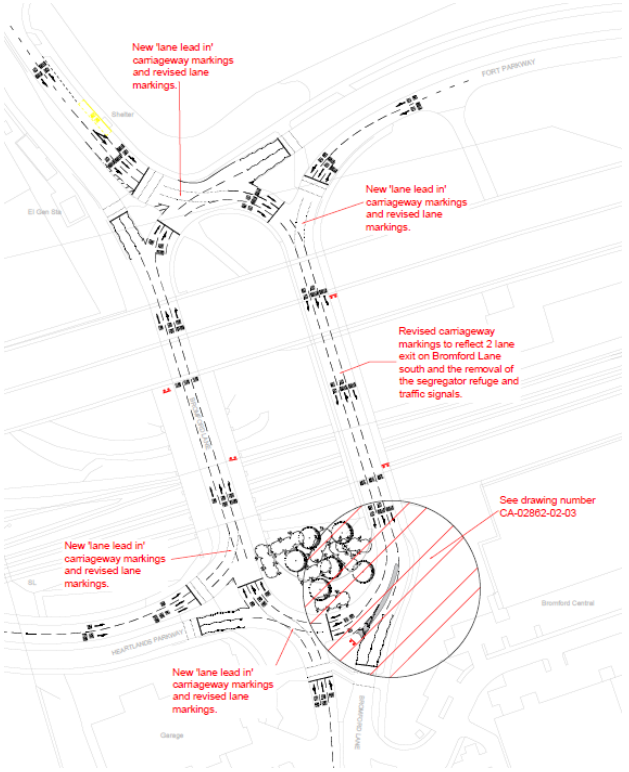
Road improvements are planned in EBNS by Birmingham City Council

At **Iron Lane and Bromford Gyratory**, work is planned to address some of the key pinch points within the study area. This will benefit journeys by private car, key orbital bus route 11 and, at Iron Lane, pedestrians/ cyclists.

Iron Lane improvements

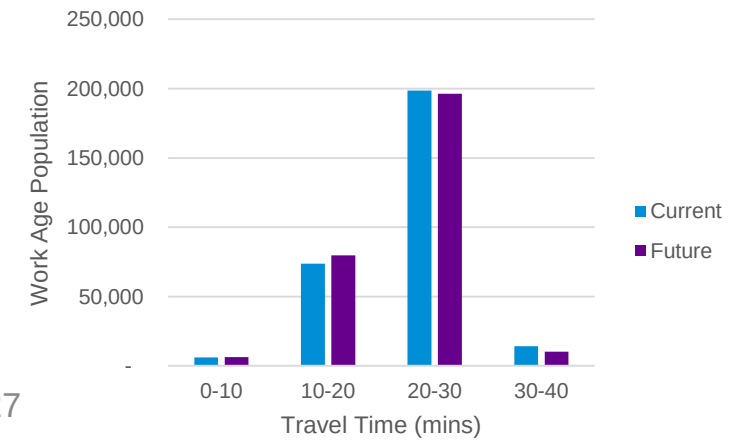


Bromford Gyratory improvements



Overall access to jobs is improved by investment. As a result of the overall transport improvements, the working age population within 20 minutes of access to one or more of the key job locations (NEC, Airport, City Centre, JLR Lode Lane, JLR Castle Vale and Washwood Heath) will increase by around 6,000 (a 7% increase) and the number of JSA and ESA claimants within 20 minutes will increase by around 800 claimants (a roughly 10% increase). We have included detailed work as an appendix

Working Age Population			
Minutes	Current	Future	Change
0-10	6,103	6,231	128
10-20	73,718	79,728	6,010
20-30	198,699	196,428	-2,271
30-40	14,155	10,288	-3,867



JSA/ESA Claimants

	Minutes	JSA claimants	ESA claimants
Current	0-20	2,526	5,867
	20-40	8,133	19,798
Future	0-20	2,766	6,484
	20-40	7,894	19,180
Change	0-20	109%	111%
	20-40	97%	97%

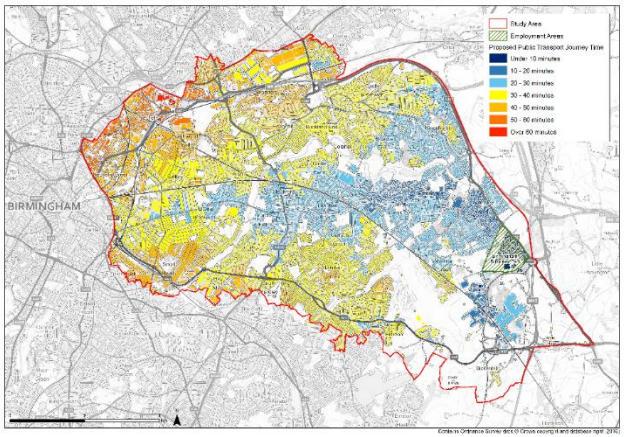
As a result of the overall transport improvements (SPRINT routes to the airport and Solihull, East Birmingham Metro line, Sutton Line improvements and improvements to train frequency at Lea Hall/Adderley Park/Stechford) enable improved access to jobs, the following cumulative benefits can be determined:

- The number of work age population within 20 minutes of access to jobs will increase by around 6,000; a 7% increase over the current situation.
- The number of JSA and ESA claimants within 20 minutes of access to jobs will increase by around 10% over the current situation.

We now examine the evidence on labour market impacts for specific employment sites. Birmingham Business Park has been taken as a case study, and shows how transport infrastructure significantly expands local labour market opportunities. (We have looked at other sites in the Appendices)

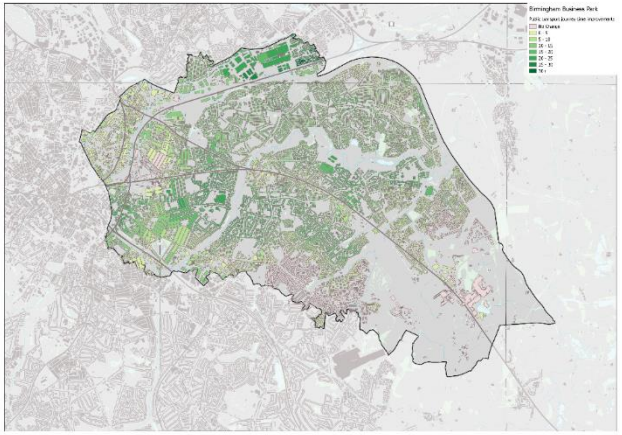
After the investment package, twice as many people of working age can access Birmingham Business Park within 40 minutes, and six times as many within 20 minutes. Nearly 100% of the EBNS working population will be within 40 minutes compared to a current 70%.

New public transport travel time to Birmingham Business Park following the planned infrastructure improvements



This map shows travel time by all modes of public transport (assuming up to 6 minutes walk to access it) to Birmingham Business Park following the planned package of new transport infrastructure (Metro, SPRINT) and rail infrastructure improvements (where improved service frequencies feed through into improved average journey times). The shortest journey times to BBP are shown in blue, suggesting that, generally speaking, those areas most geographically proximate to BBP have the best access times.

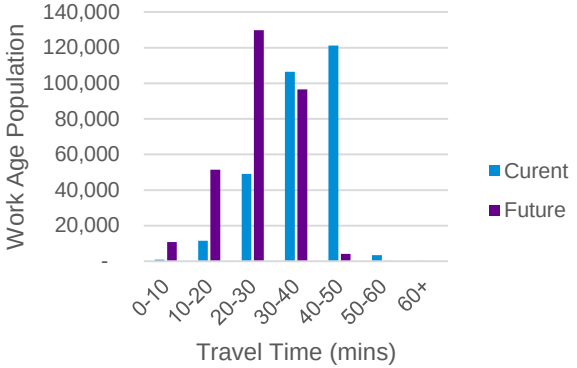
Change in Public transport travel time to Birmingham Business Park following planned infrastructure improvements



The *change* in travel time is shown in the map above.

Those areas which experience the biggest improvements are shown on the map in light purple and include places which are more distant from BBP including Tyburn and Nechells. Sheldon and Shard End also see significant improvements. In particular, Nechells, with a population of 33,957, has areas with a decrease in journey time from 50 minutes to around 30 minutes.

Overall impact on people of working age (16-64)



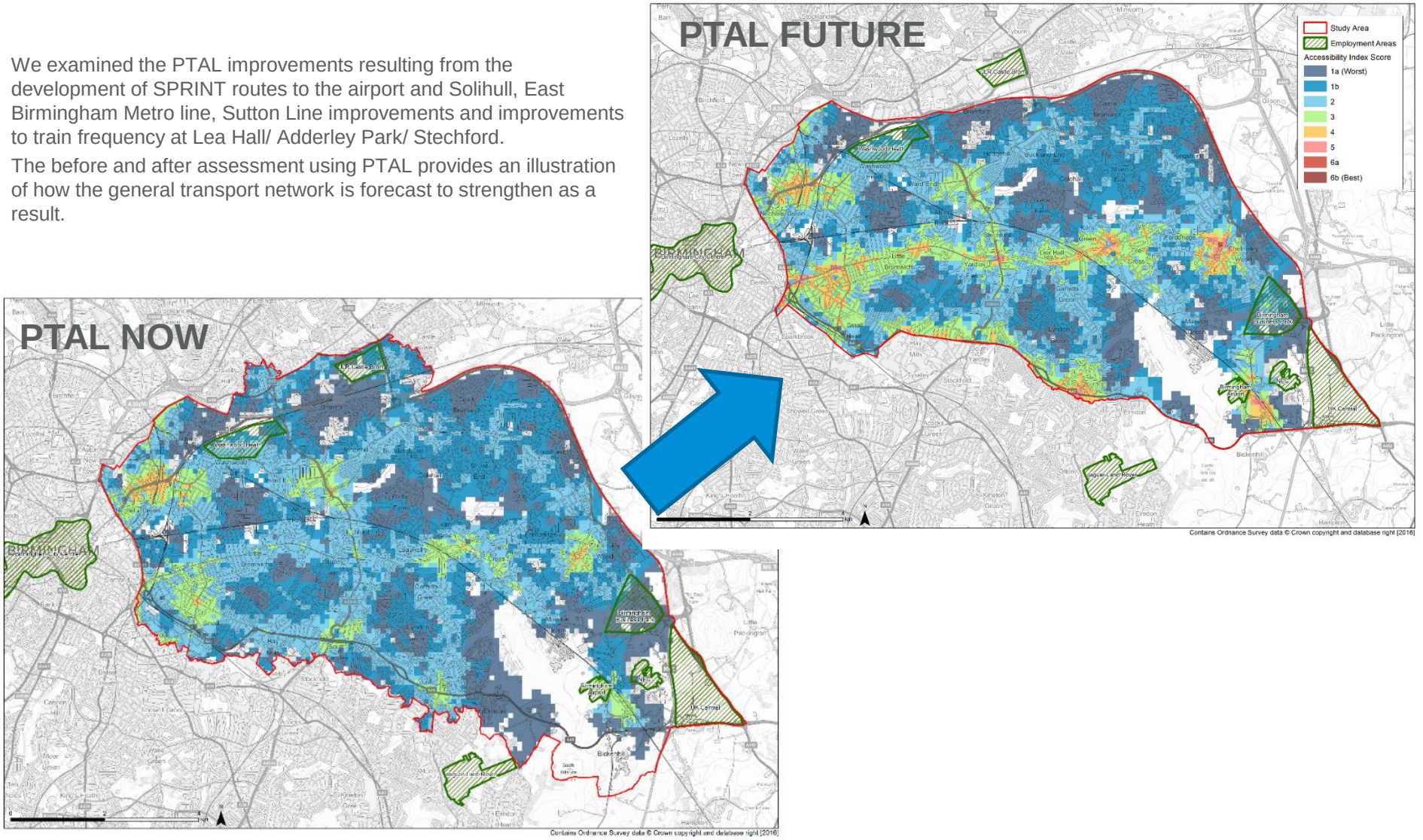
Working Age Population			
	Current	Future	Change
0-20 mins	12,511	62,203	497%
20-40 mins	155,506	226,366	146%
40+ mins	124,658	4,106	3%

The graph and summary table above show the overall impact on labour catchments at BBP. The increase in people within 20 mins commute is quite dramatic, at 497%. The scale of this shift is explained by the very limited current available public transport to BBP. Metro has a stop in BBP, which immediately creates a major impact itself, whilst Metro connections to other modes (rail, bus) also creates a positive ripple effect across the area

Transport connectivity (as measured by PTAL) will improve significantly after the programme of planned public investment

We examined the PTAL improvements resulting from the development of SPRINT routes to the airport and Solihull, East Birmingham Metro line, Sutton Line improvements and improvements to train frequency at Lea Hall/ Adderley Park/ Stechford.

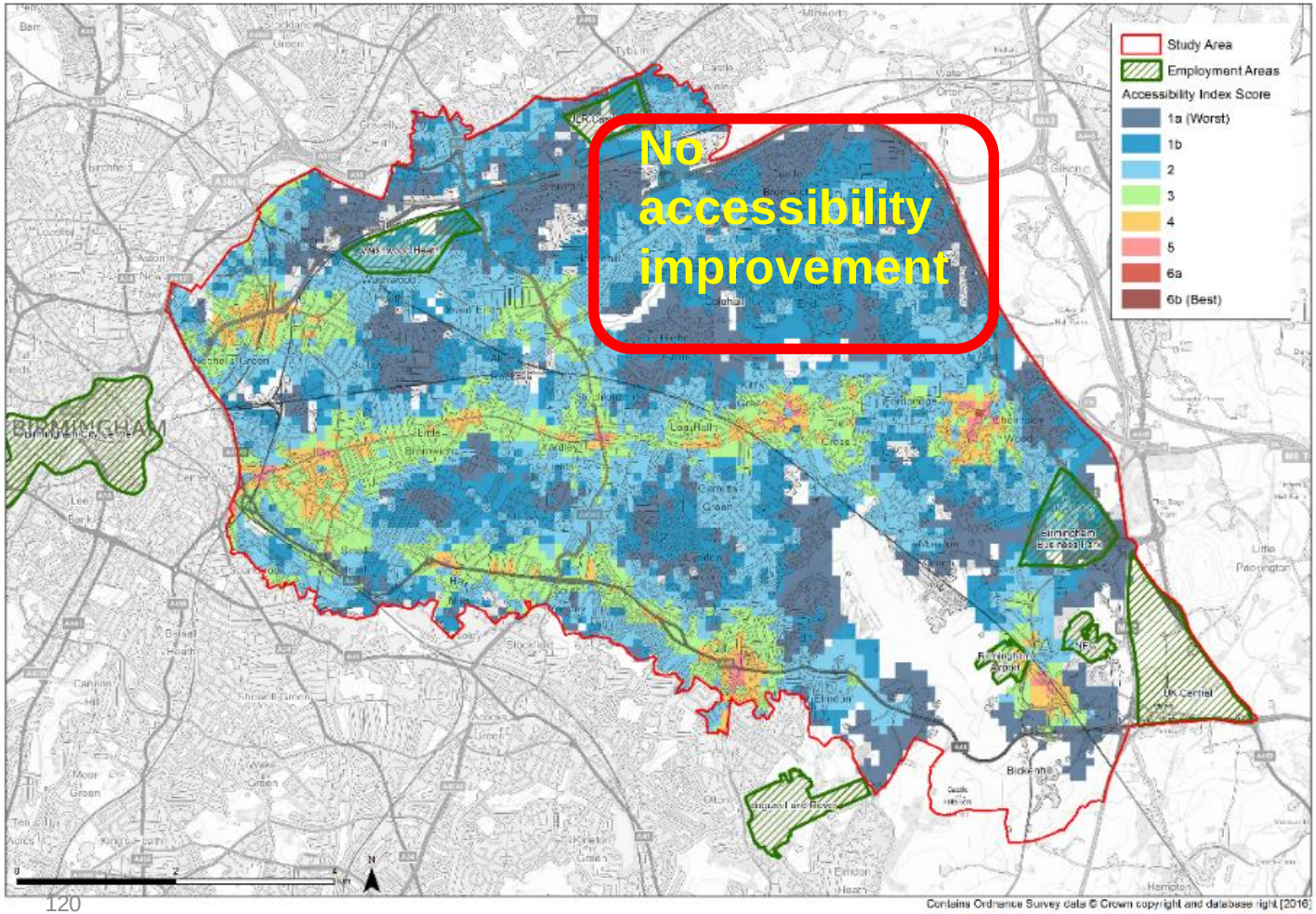
The before and after assessment using PTAL provides an illustration of how the general transport network is forecast to strengthen as a result.



The evidence shows that, even after connectivity investment, the northern part of the EBNS area still has poor accessibility to jobs by bus (other than those jobs in the city centre). Its projected PTAL score shows limited improvement

The PTAL score and accessibility of the Castle Bromwich residential area, particularly to Birmingham Airport/ NEC/ UK Central and JLR sites, does not substantially improve as a result of the rail, metro and SPRINT schemes proposed.

It may be necessary to improve services in these areas in order to help ensure an equitable level of jobs access across EBNS.



The evidence suggests that further improvements are likely to be required to enhance provision in northern parts of the study area. New bus routes could be considered. There may also be scope to create park & ride facilities around Metro or rail stations, creating more general benefits

In improving public transport services, it is beneficial to provide destinations at either end of the service to try and maximise the capacity of each bus and minimise the amount of "dead-running" (i.e. empty buses); this maximises the efficiency of any new service and provides the greatest opportunity to sustain viable public transport.

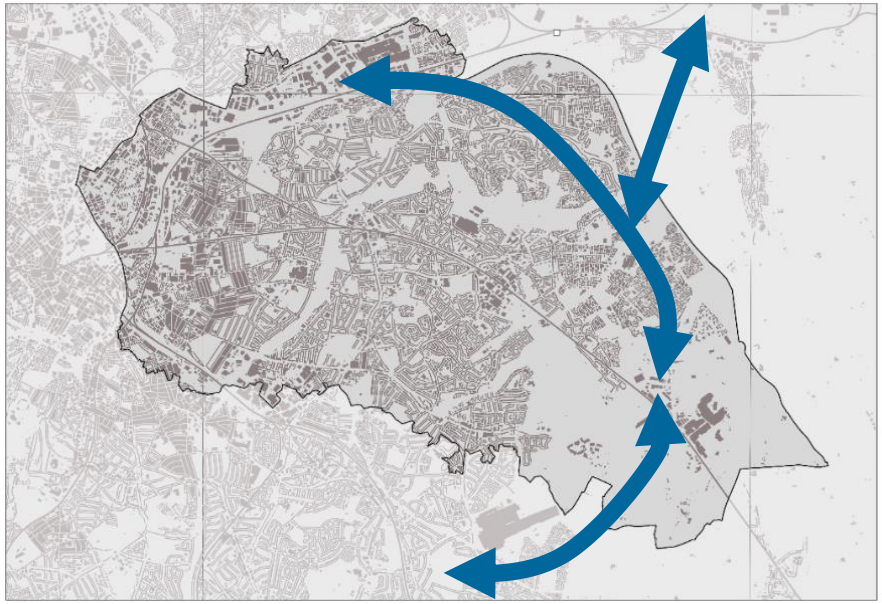
The evidence suggests that one potential option, particularly once the next extension of Jaguar Land Rover Castle Vale is operational, would be to provide a service operating between Jaguar Land Rover Castle Vale and Birmingham International Rail station and/or Jaguar Land Rover at Lode Lane. It may be possible to link this to the proposed rail station at Castle Vale to provide further destinations accessible by public transport to use as part of a longer journey and reduce car use.

Additional services to Peddimore and Langley could be considered. We understand that the devolution deal contained a Sprint route linking UKC to Water Orton via North Solihull.

The frequency of this bus service could be linked to shift patterns at Jaguar Land Rover Castle Vale and Birmingham International, and as these are often out of the core hours, it may be possible to use existing fleet vehicles to operate this service. Opportunities to extend or improve speeds of existing services, such as those operating between Solihull and Birmingham International could also be explored. As noted previously, journey time is a key factor, and so a limited stopping service to concentrate key locations may be required. Use of bus priority on key sections of highway may also provide benefits to all bus users by advantaging them over private cars in congested areas. **There may also be scope for improving bus links to the airport, perhaps run in partnership with employers.**

An investigation for the scope for Park and Ride facilities near metro or rail could also be useful. (TfWM are currently looking at the issue). We understand that similar facilities on Metro in the Black Country have proved popular, and could run in line with revisions in parking standards in central Birmingham.

New bus route possibilities



The “last mile strategy” is important to overall effectiveness of public transport interventions, and has important health benefits. Evidence suggest that it may be helpful to explore cycling facilities to Metro stations and Sprint stops

Public transport journeys often also include an element of walking: in London, for example, over two-thirds of all public transport trips involve walking for five minutes or more and half of all walking is done as part of public transport trips. (Mindell, JS et al, 2011) Walking and cycling provides health benefits to people using the public transport network, and is explored further in this report in the section on public health. It may be useful to explore how walking and cycling facilities (such as cycle sheds) might integrate with metro and sprint investments, to widen the effective catchment of the infrastructure.

BCC is currently rolling out a programme of 20mph limits at various locations across the city. There are opportunities to explore how this could be rolled out in EBNS.

Wayfinding and information available at potential employment and transport opportunities will be important to maximise the integration of the transport network within the EBNS area and thereby the economic and social benefits of the transport improvement programme for the area.

Image: BCC

Accelerating place investment

Key issues:

- Housing development viability is poor, slowing the delivery of change
- Transport is part of the viability solution and creates opportunities
- Retail is struggling in some places, and could be reconfigured

Why is this issue important? A brief review of the literature and local context

Economic modernisation depends fundamentally on the market's ability to reconfigure built assets on housing and employment sites in response to economic and social change. If making these changes to the built environment cannot be made profitable for an entrepreneur, then an area's economy will suffer very serious negative effects over time: it creates a shortage of locations in which modernising investment can take place.

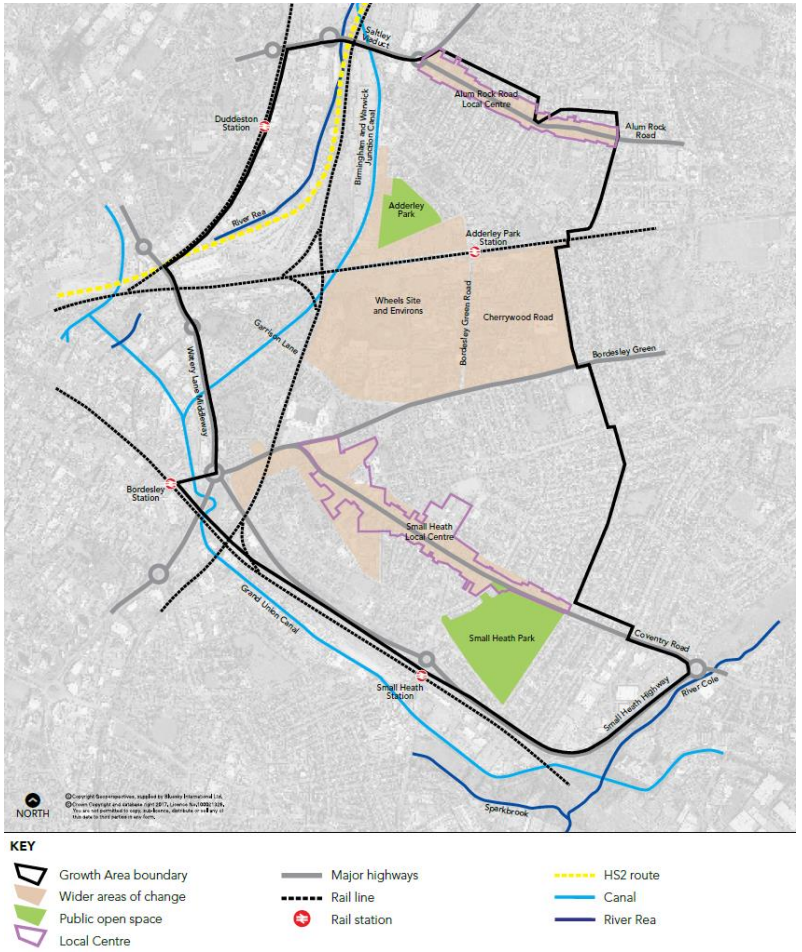
Evidence shows that positive impacts from transport policies have been lost in the past because of poor integration with land use and regeneration policies. Evidence suggests that supporting economic and planning policy is necessary to capture benefits from transport investment. A transport project can potentially promote local and regional economic development if an economy has growth potential and if suitable reinforcing policies are designed and implemented (Berechman, 2001). For example, poor integration with land use and regeneration policies has meant that the regeneration effects of the Sheffield Supertram have been minimal (Lawless 2001).

Considerable work has been done by BCC and SMBC on Local Plan allocations, and AAPs. We are not trying to replicate this. Instead, we are pulling together the review of baseline information for transport accessibility, retail, local employment, and housing to understand what opportunities could be create in EBNS.

The Birmingham Development Plan (BDP) sees two growth areas in EBNS: Bordesley Park and the Eastern Triangle. At Bordesley Park plans exist for 750 new homes and up to 3,000 new jobs

The BDP sets out an approach for East Birmingham. The Bordesley Park AAP Pre-submission Report (BCC, 2017) provides more detail, and looks specifically at an area of around 580 ha to the immediate east of the City Centre, including parts of Washwood Heath, Bordesley Green, Bordesley Village and Small Heath. The AAP promotes significant transport investment, including the extension of the Metro through the area and the construction of the Bordesley Chords.

- **In the AAP, options were explored for the Wheels site**. The preferred option sees the site redeveloped for new employment uses. The rationale given is that there is a shortage of employment space in the city, and that the site is contaminated, and so would need extensive remediation and level changes before it could be used for residential.
- **The AAP's Cherrywood Road preferred option** seeks the creation of a new residential neighbourhood.
- **The AAP's Adderley Park preferred option seeks mixed uses**, with some heavier industries and bad neighbour uses relocated and an exploration of relocation options for the currently constrained Adderley Primary School.
- The AAP's **Alum Rock Road option** includes gateway expansion and enhancements, and improved use of space at St. Saviour's School, and commercial premises.
- **Small Heath's linear local centre runs for 1 mile from Cattell Road to Small Heath Park**. The AAP finds that "within the centre, opportunities for change are limited [but] the area at the western edge (Cattell Road) does have the potential for improvement". One of the options explored considered local centre consolidation – returning some retail uses at the extreme east of the centre to residential use. This option was rejected in favour of an approach which encourages investment and the creation of a 'gateway' including new development to define the western end of the centre



Source: Birmingham Development Plan (adopted 2017)

The Birmingham Development plan proposes an Eastern Triangle (covering Stechford, Meadway and Shard End) will deliver regeneration and around 1000 new homes

The Birmingham Development Plan proposes that the Eastern Triangle will deliver regeneration and growth for around 1000 new homes. The potential for the redevelopment of further unsuitable housing stock as well as the more efficient and effective use of existing land and buildings where practical and particularly at locations that are close to local centres, accessible by public transport and on or close to main transport corridors will be explored.

At Stechford this will include:

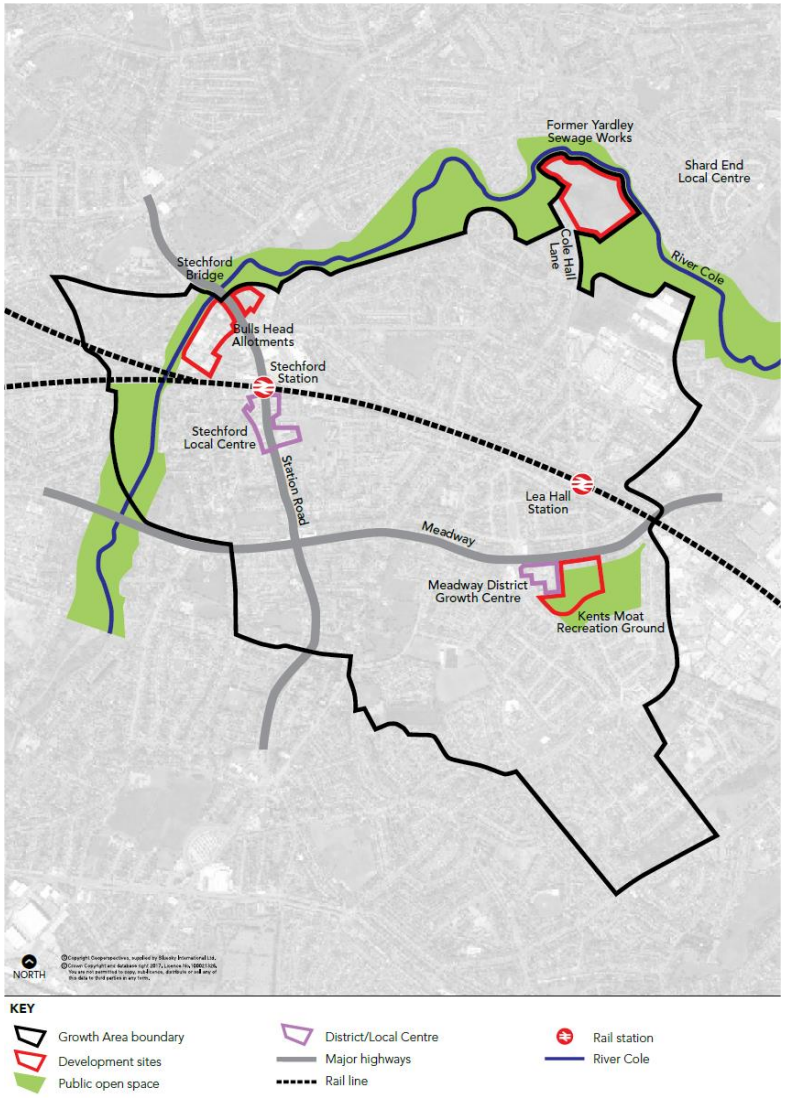
- The promotion of new residential development, and the growth and improvement of Stechford Local Centre to meet the retail, service and community needs, and potential to consider the future of other sites for housing or associated development including under-used allotments at Burney Lane and Francis Road.
- Improved accessibility by all means of transport including enhanced pedestrian and cycle linkages and connectivity to Stechford rail station and the local centre.
- Environmental improvements, including enhanced access to the River Cole Valley.

At the Meadway this will include:

- Redevelopment of the former Meadway flats site which will deliver the reconfiguration and enhancement of the adjoining Kent's Moat Recreation Ground and Poolway Shopping Centre (already under way).
- Improvements to Lea Hall rail station, including improvements to parking, interchange and the pedestrian and cycle links from the station to the centre and adjoining residential areas.

At Shard End this will include:

- The removal from the Green Belt of part of the former Yardley Sewage Works site and development of up to 350 new homes.
- Enhancement of the Cole Valley



Source: Birmingham Development Plan (adopted 2017)

In Solihull, the draft local plan looks specifically at two areas which sit either partially or wholly within EBNS: UK Central and the North Solihull regeneration area

The Draft Local Plan (December 2016) deals specifically with the North Solihull area within the EBNS study area. In North Solihull, the plan states that

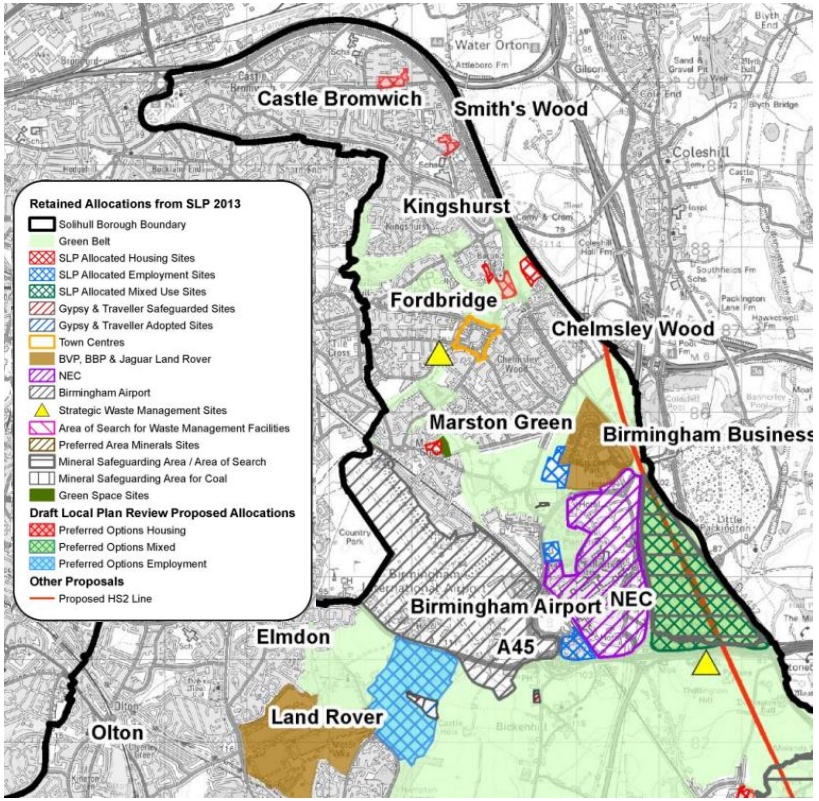
"the regeneration programme will continue to have made a real difference to people's lives where there will be an increased choice in the housing stock through widening the housing mix, size, type and tenure, and improved quality; improved opportunities and access to employment; a more highly skilled workforce and a better range of jobs. This will include better connections to employment and other opportunities beyond the area through investment in public transport. Local communities will have become healthier, safer and mixed with easier access to thriving community hubs and village centres, enhanced green space and public realm. The River Cole valley and its setting will have been protected and enhanced. Chelmsley Wood Town Centre will have become a vibrant centre with a better range and quality of retail, leisure and community facilities."

The vision for Chelmsley Wood Town Centre is that it

"will be developed and sustained as a focus of commercial activity, services and public transport. It will be shaped and managed to secure its regeneration and economic growth and to provide a focus for the local community and an identity of which it can be proud". Policy P2 states that "further limited comparison retail development is also included. New development can bring opportunities to strengthen the role of the Centre in serving the community by improving links to North Solihull and to nearby open spaces".

Policy P1 deals with the UK Central Hub Area. The area contains Birmingham Airport, the NEC, Arden Cross, Birmingham Business Park and JLR (which are each key economic assets) and seeks to support their future aspirations in a holistic, well connected way, together with the development of the HS2 Interchange Station.

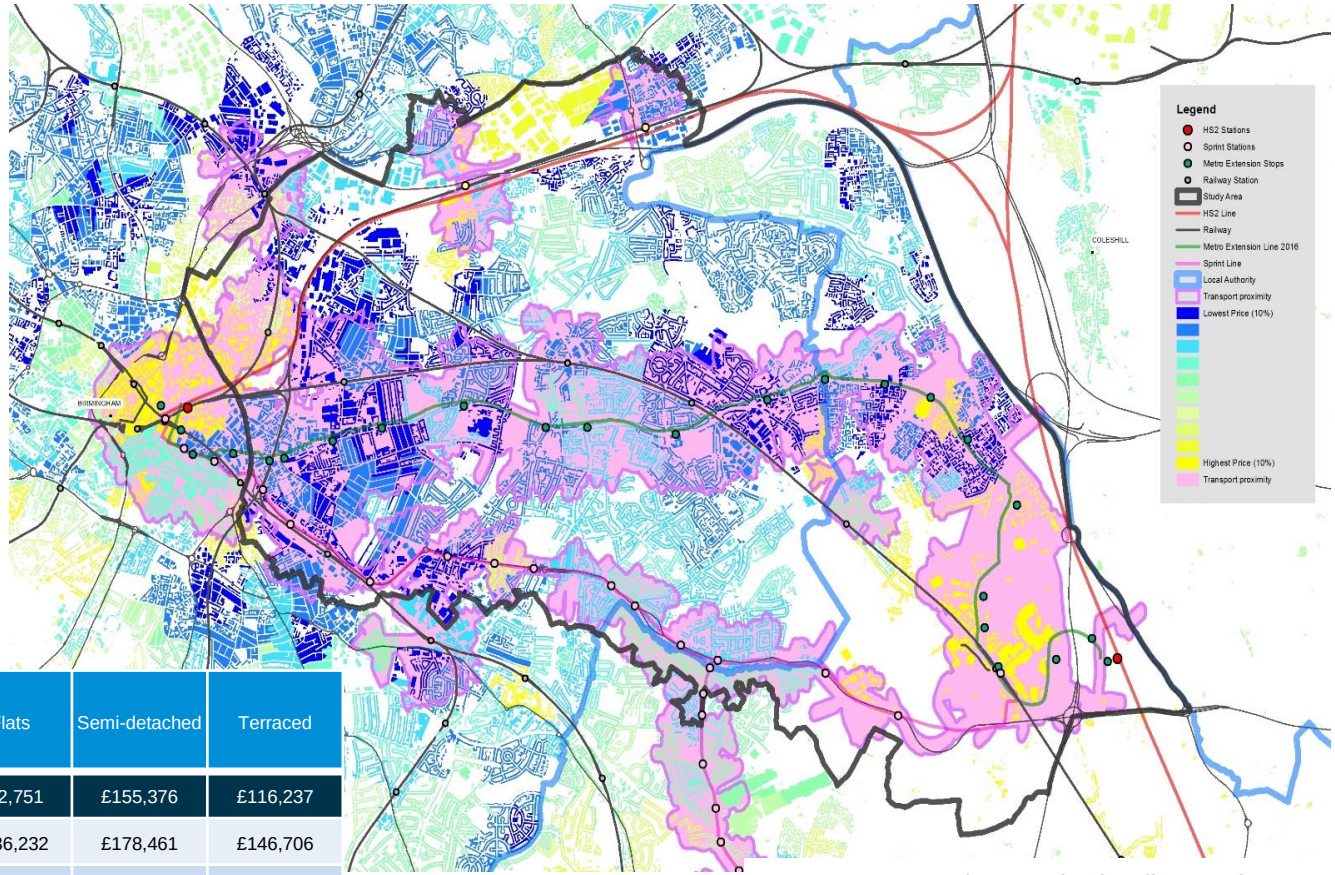
The UK Central Hub has a Growth and Infrastructure Plan which specifically looks at the area. The area has a dedicated Urban Growth Company (UGC) - a special purpose delivery vehicle created specifically to realise the full economic potential of the HS2 Interchange Station and related infrastructure.



Whilst planning strategies for EBNS exist, the market has been relatively unwilling to take them up. The central problem is likely to be one of viability

Housing sales values are relatively low in EBNS. Because housing build and labour costs are relatively fixed, and land costs frequently inflexible, this means that developers have a narrow profit margin – making development relatively risky for them in parts of EBNS

Rank of LSOA on average house-price for all properties, over the last 12 months (June 15 to May 16)



Property price by house type	All types	Detached	Flats	Semi-detached	Terraced
EBNS study area	£176,509	£236,151	£82,751	£155,376	£116,237
Birmingham LA	£206,887	£356,523	£136,232	£178,461	£146,706
Solihull LA	£311,640	£456,343	£168,283	£251,247	£187,866
WMCA constit LAs	£228,237	£396,524	£142,594	£194,321	£151,480
England	£300,314	£386,568	£269,473	£238,292	£233,163

Dataset: *Average house-price for all properties, over the last 12 months. The Land Registry collect data on all housing transactions, published by individual property and date.*

Date: *Jun-15 to May-16*

Source: *Land Registry*

Transport investment in EBNS could improve the viability of sites, and so be used to accelerate a positive process of market-led redevelopment

Low wages locally mean that housing sales values are low. On their own, this damages the viability of development. But, particularly in the central and western areas of the EBNS area, there is frequently an additional factor that damages development viability further. The area's ex-industrial heritage means that sites are frequently relatively expensive to develop: previous uses mean that land has to be remediated. This can be costly, and also represents a significant risk to developers, because it can be difficult to buy land in full knowledge of remediation risks. Combined with a very similar issue in employment land markets, this reduces the ability of the economy to respond to economic change and so generate productivity growth.

Transport investment can raise sales values of housing sites, so improving site viability and encouraging development activity. However, transport investment is not a magic bullet which will solve all viability problems. An LSE review on transport economic impact studies (LSE 2015) found that the quality of studies on the impact of transport on land and property is variable. In all cases there is great variability in the models employed; the data used; the variables measured and hence there are difficulties comparing results. The LSE reported the following.

- A 1% increase in accessibility as expressed in the travel time, discounted access to employment opportunities (and correlated effects), induces a roughly 0.25%-0.3% increase in residential property prices (Ahlfeldt 2011).
- Mikelbank (2001) suggested that home prices rise in response to transportation improvements that occur along shortest-path routes connecting individual homes to the region's CBD or to the local shopping centre;
- Many studies have found a positive relationship between transport infrastructure investment and the prices of land or housing (e.g. McDonald and Osuji, 1995; Haughwout, 1997; Boarnet and Chalermpong, 2001).
- A study of US towns over two decades showed house value premiums for homes within a quarter to half mile from train stations ranging between 6.4% to 45%.
- A study of residential property values in Buffalo NY found that average property values increased by $2.31 for every foot closer the home was to a light rail station.

Rail projects tend to have a positive effect on residential property prices, although the size of the effect varies considerably depending on the type of residential unit and its proximity to provision. The LSE's work found that for evaluations showing positive effects, the degree of price appreciation ranged from extremely small to quite substantial. For example, a study which looked at the impact of light rail in Charlotte, North Carolina found effects that ranged from near zero up to around 13%, depending on:

- the type of property (for example, 'condominiums' see a greater increase than single-family properties); and
- proximity from the station (for example, single-family homes within half a mile of the station see no impact, whilst condominiums within half a mile are subject to a greater increase than those further away).

No rail effect on commercial property prices has been found. The LSE found one good quality study on rail effects on commercial prices – but it found no effect.

We have undertaken high level viability work to look at the extent to which market forces can be expected to achieve higher housing supply and area regeneration, or whether public subsidy would be required

Employment growth around the EBNS study area at the HS2 Birmingham Interchange and the continuing growth in Birmingham city centre employment, combined with increased connectivity of enhanced services to the rail stations and the planned rapid transport link between these two centres, provides an opportunity to consider whether these factors can combine to result in improvements in development viability which would allow new, more ambitious strategies to emerge.

We have undertaken high level viability work to look at the extent to which market forces can be expected to result in improvements in viability, or whether further subsidy would be required.

Large areas have been chosen for the case studies so that a “market shift” can be achieved with higher densities, higher market values and an increase in neighbourhood spending power by encouraging households on higher incomes to move in or work in the areas. In neighbourhoods of 500 to 2,500 dwellings it is considered that a 50% increase in market housing stock, and with that aimed at higher earning households, is required to achieve a “market shift” and to attract new employers. The absolute number of affordable (or sub-market) dwellings will be maintained, in part through reprovision in the same neighbourhood.

The case study areas

Three neighbourhoods have been chosen for high-level study. Each lies close to the proposed Metro link route and the existing rail services. Each has low intensity land use with relatively low market values.

- Case Study A has a mix of land uses, mainly light industrial, and covers an area of 47.7 hectares. Case study A sees an increase from 47 dwellings to 250 dwellings.
- Case Study B is predominantly residential and has an area of 37 hectares. Case study B sees an increase from 670 dwellings to 1,000 dwellings.
- Case Study C is a larger area of residential with retail zones and has an area of 99.4 hectares. Case Study C sees an increase from 2,143 dwellings to 3,000 dwellings.

Details and some important caveats are attached as an appendix.

The results of high level viability testing: one case study scenario is viable, whereas two are not. The market-viable scenario is predominantly residential. The non-viable scenarios could be made viable with £21m/ £39m subsidy, or made more viable through an increase in housing numbers to create greater value uplift

The results

Case Study A does not appear to be viable. This is due to the retention of a high proportion of employment use (in warehousing and light industrial). The value uplift potential for these land uses is low. If more housing was included, then development would be more viable.

Case Study B appears to be viable. The focus on market housing intensification and the ability to achieve the highest density increase (the ratio of original density to proposed density) generates the highest uplift effect.

Case Study C does not appear to be viable. Housing density uplift is not as great because the existing housing density is at an above average level. Furthermore, the acquisition costs of businesses such as large supermarkets are closer to the proposed value and the lost rental income during a redevelopment is significant.

HCA or similar public sector interventions would be very helpful in de-risking site development. HCA funding is available for this, as is Combined Authority funding.

A summary of the results is shown in the table.

Practical considerations

Community Infrastructure Levy has been recycled within the study areas to meet some of the infrastructure obligations (hard, soft and social). The size of the areas make this a reasonable assumption.

A method of capturing potential increased hope value is required. As schemes like these take effect then expectations of remaining owners rise. Some form of declaration (or setting a base line of Existing Use Value) before commencement coupled with CPO powers, perhaps through a New Town, or Combined Authority Mayoral, Development Corporation, or similar, could be helpful.

Large scale redevelopment schemes involving existing housing were common in city areas for much of the last century. In more recent times these have become harder to instigate because of the uncertainties and upheaval that will impact existing residents. The gains though are substantial and, as we see a reduction in appetite for adding to housing supply on green field sites, capacity for engagement and local governance will need to be enhanced.

High level viability scenario testing results

Ratios and results	Market Housing EUV	Market Housing GDV	Ratio	Housing density before	Housing density after	Ratio	% AH before	% AH after
	£	£		dpha	dpha			
Case Study A	95,000	200,000	2.1	61	83	1.37	0%	0%
Case Study B	125,000	225,000	1.8	35	61	1.74	49%	33%
Case Study C	125,000	225,000	1.8	45	61	1.35	51%	36%

	EUV	GDV	Ratio	Project balance
	£m	£m		£m
Case Study A	37	227	6.1	-21
Case Study B	61	187	3.0	4
Case Study C	259	699	2.7	-39

	AH	=	Affordable Housing
	EUV	=	Existing Use Value
	GDV	=	Gross Development Value
	dpha	=	Dwellings per hectare

As the land supply reduces, the North Solihull Partnership will need to reduce its activity in March 2018 – but has valuable lessons which can inform future strategy development in EBNS. A major determinant of performance was site viability: markets performed less well than hoped, meaning that targets were missed

PBA interviewed the Regeneration Director of the North Solihull Partnership as part of the baseline study.

The North Solihull Partnership started 12 years ago, with the objective of using investment in education infrastructure though the Building Schools for the Future programme alongside physical and community regeneration to deliver a step change in education and deprivation levels in North Solihull. The Partnership was comprised of four partners – Whitefriars Housing Association, Bellway, Solihull MB Council, and InPartnership (commercial developer). The strategy was intended to capitalise on the relatively low-density development of the area (given the area's Radburn estates and redundant school sites) to generate new housing opportunities.

The Partnership was set up with an innovative financial model. It intended to use the value created from the grant of planning permission on under-utilised land to help pay for wider redevelopment, alongside other public sector funding streams. The typical process was that land in council ownership was declared surplus; then sold to the North Solihull Partnership at existing use value; planning permission acquired; and then land was sold with permission, allowing the uplift in value created by permission to be recycled through the Partnership and used to deliver wider social objectives. In the case of school surplus land and playing fields, 50% of the value uplift from replacement value had to be spent on education within the LEA area. Warwick Manufacturing Group have delivered a new school, seven new schools have been provided and three refurbished. One more primary school to come in Yorkswood.

The Partnership has not achieved its objectives around housing. The Partnership has built 2,000 homes, against its original target of 8,000; it has demolished 1,000 homes, whereas the original strategy set a target of 3,000.

We understand that there are a number of reasons for this. Firstly, the uplift in housing values created on redeveloped sites has turned out to be less than expected in the original financial modelling, so depressing the uplift in land value resulting from planning permission. This has depressed the willingness of developers to bring forward new housing: second hand property in North Solihull can be bought for £100k, which puts a natural limit on the price of new stock. There was a wider housing downturn caused as a part of the financial crisis

Secondly, costs and risks were higher than projected. A particular problem has been the acquisition of owner occupied homes, frequently those acquired under right to buy. Whilst extant, AWM paid for the acquisition of existing owner occupied properties and demolition, and subsequently other grants were given through Whitefriars to create equity investment in properties to enable people to move. Further, the planning process associated with the release of school property has proved lengthy and complex, increasing risks for developers who run the cashflow risks resulting from having investment tied into sites which are running through relatively risky Section 77 planning processes. The costs and complexity associated with decanting and at times extinguishing businesses has been high.

(see over page)

Viability lessons from the North Solihull Partnership (cont.)

(cont. from previous page)

Significant public sector investment has accompanied private sector investment. The Regeneration Director of the Partnership has estimated that there has been over £0.5b investment in the area, including £50m from HCA. In more recent years, commercial developments have only really gone ahead because the Council has stepped into developers' shoes – and have made grants to keep the property acquisition process moving.

At its peak, the North Solihull Partnership was a major management undertaking, with over 30 full time employees.

Community opposition to parts of the strategy was strong, necessitating a change in strategy. Broadly speaking, local people now accept that the housing was a "cost" of the necessary facilities. There were local suspicions that the Partnership was a vehicle for Bellway, and the evidence that schools were being re-provided did not create a broad enough constituency of support across the community. This had political implications. At commencement of the Partnership there was a political consensus that the regeneration programme would not be politicised. This consensus broke down, and the electoral profile of the area has changed. Support has increased in recent years, but has only come as a result of community facilities in village centres being delivered. In the last four years a wider approach has been taken which extends benefits to those without school age children, with the provision of specialist accommodation for over 55s, residents with learning difficulties (with extra care and dementia care buildings programmed). Significant amounts of money (£150k per annum) have been raised for local community and voluntary sector groups, which has further assuaged community opinion.

Policy flexibility has been important. Public sector policy has had to respond to more difficult economic conditions. On housing, the Council has derogated from policy which encouraged mixed tenure developments to allow sites which are 100% outright sale (and 100% affordable). There have also been adjustments to the funding model: when the OJEU selection process started there was a condition that first 700 properties built would go to Bellway, and then the rest would be market tested. After the crash, the viability of the Partnership was in question, and Bellway was provided loans to keep the partnership going; in exchange the 700 property stipulation was set aside.

It is unlikely that we would be able to directly reassemble the North Solihull Partnership to work in East Birmingham. Inpartnership has adjusted business strategy; Bellway is wary of the risk and complexity of regeneration sites, and is being successful in obtaining the volume development sites it needs elsewhere; and Whitefriars Housing Association, is unlikely to compete with Birmingham Municipal Housing Trust in the area given the financial advantages that Birmingham Council enjoys around financing costs and the treatment of stock depreciation. Nevertheless, it would not be definitive that Whitefriars/Bellway would not be interested in East Birmingham without a specific discussion surrounding the full scope of the area.

The Partnership is expected to reduce activity in March 2018. Land which is in the control of the council will be brought forward by March 18. Once the land supply is exhausted, there is limited funding to cover overheads. Regeneration work in North Solihull will continue through the Council and private sector partners.

Birmingham Municipal Housing Trust is now Birmingham City Council's preferred the social housing developer for the Birmingham administrative, area and no land transfers are made to RSLs. Birmingham are using prudential borrowing to do this rather than bank finance. It is likely that large scale housing regeneration strategies and private sector will need the very close involvement of the Municipal Housing Trust, and take account of the experience gained in North Solihull around costs, values, planning risks, the level of management commitment and the importance of policy flexibility set out above.

Innovative housing delivery methods may improve the build out rate and viability of development in EBNS. A number of initiatives could be investigated further, and BCC is developing expertise in the Private Rented Sector

Using Private Rented Sector (PRS) investment to broaden the tenure available to new occupiers could increase delivery rates. We note that BCC has experience in the PRS sector through INREACH, a company set up specifically to develop new homes for market rent within the city.

Around the country, the emerging model is one of developers finding the opportunities and working in partnership with the public sector to secure land at low value and/or agree nominal affordable housing contributions – and agree other elements including access to funding and reductions in planning risk. Some of the cost assumptions (e.g. ongoing management costs) are untested and therefore part of the role of the Councils (and HCA) could be to bring forward these sites for development as 'proof of concept' to establish new benchmark costs and values as a basis for future developments.

Using custom and self-build could broaden the appeal of the site to groups which might not find a volume housing product attractive. The argument is that custom and self-build provision would broaden the effective market for new homes, in a context where 75% of the population will not buy a new home from any volume housebuilder resulting in a small number of prospective purchasers for any particular speculative volume housebuilder standard house type range.

Igloo's written evidence submitted to Parliament (Housing and Planning Bill 2015) suggests that the three principle forms currently operating in the UK are:

- Individual Custom Build - where a small builder delivers a single home to an individual's design either on a site owned by the customer or the builder (the "Grand Design" approach)
- Custom Build Development where a Custom Build Developer secures the site and planning and offers a basic house type with scope for customisation (eg Inhabit, Fairgrove, Modcell, Urban Splash, HAB) and
- Custom Build Enabling where an enabler secures the site, planning permission, mortgages and a panel of Home Manufacturers and then delivers and markets the serviced plots (eg igloo, Cherwell).

Igloo's evidence states that

- 53% of the UK population would like to build their own home at some time in their lives (12%/7 million people in the next 12 months) but only around 10,000 succeed (IPSOS Mori).
- The available evidence suggests that Custom Build is around 3-5 times faster than market sale (Holland).
- In the UK self-build amounts to around 10% of new home production and there is virtually no Custom Build. Igloo finds that in other developed countries, on average, around half of homes are Custom Build or self-build and they build on average about double the number of homes per head of population.

However, Igloo state that *"to be viable Custom Build requires sites in excess of 100 plots. Home Manufacturers require on average a minimum of around ten to fifteen homes per site in order to recover the individual site set up costs and make a reasonable profit (they typically require a profit margin slightly above a builder (say 5%) but substantially below a developer (say 20%) because they do not have sales risk or a significant requirement for capital (as they are paid in stage payments before they have paid their suppliers)."*

There is no question that this is a currently unproven marketplace. Careful policy scoping work would need to be undertaken.

Direct action to deal with land remediation is likely to be necessary at some sites. £200m Combined Authority funding is available over five years for these tasks.

Birmingham City Council is a major player in housing development, through the Birmingham Municipal Housing Trust, which builds 25% of all new homes across the city. HCA also has funding targeted at housing sites. Any future strategies would benefit from close alignment with BMHT and HCA

The Homes and Communities Agency (HCA) has funding streams targeted at the purchase, de-risking and decontamination of housing sites. HCA will be useful partners in future regeneration efforts in East Birmingham.

Any attempts to create new growth nodes is likely to need to involve the Birmingham Municipal Housing Trust (BMHT). BMHT was set up in January 2009 as a brand name for the Council's new build programme. BMHT is part of the Council, not an arms length organisation. HRA subsidy reform made it viable for the Council to build new homes for the first time since the 1970s. The Council can bid for HCA grant in the same way as a Housing Association.

Quite independently of any long term plans for intensification around transport nodes, BCC is active in local housing development markets, focusing on financially unviable housing stock and site development opportunities. The BCC 2016 asset management model identifies 11 financially unviable tower blocks in East Birmingham - all Large Panel System blocks, in Erdington, Bromford and Ward End. There is also a small number of non traditional built low rise unviable properties in Shard End. Most of the BCC stock is financially viable. Total programmed BMHT delivery in the East 2016-20 is 1,241 units, as follows:

- Abbey Fields - 320
- Erdington Gardens - 116
- Meadway - 300
- Bromford – 200
- Yardley Brook – 250
- Small sites - 75

There are also a series of privately owned sites for potential acquisition in the East. BMHT's model requires up front working capital of £10 million, recycled through the programme as sites are built out and properties sold.

Direct delivery through BMHT means the Council is in control of the development process, meaning that:

- The Council can control timing/phasing of developments not subject to other partners' Business Plans;
- The Council can directly control rents and customer service standards;
- The Council can cross subsidize sites to achieve viability;
- The Council can control design standards and quality on new developments in detail;
- The Council can offer a range of tenures to suit local housing markets.

BMHT schemes at Abbey Fields Erdington

North Solihull Partnership has made progress on regeneration schemes around North Solihull. NSP has previously delivered new centres at Chelmund's Cross (previously called Craig Croft) and Smiths Wood. Kingshurst is now being progressed. Future strategies will need alignment with NSP and its possible successors, and use its experience

North Solihull Partnership has a track record of successfully regenerating obsolete retail parades. A large element of the first phase of the programme was funded on the use of surplus playing field land, which went hand in hand with the provision of new schools and associated facilities.

At Craig Croft, the old precinct at Craig Croft had a range of facilities available to local residents but the area was becoming increasingly run down. The area has undergone regeneration and has been renamed Chelmund's Cross.

Similarly, the shopping precinct in Arran Way, Smiths Wood, was becoming increasingly out of date and run down. A brand new shopping centre has been created in a more accessible location with its own high street at Burtons Way, Smiths Wood.

The next area for regeneration is Kingshurst, **where a regen scheme by SMBC is looking at updating the local centre.** Perhaps typically of the area, Kingshurst is a 1950s/1960s inward facing centre that is now somewhat dated, a poor use of land lends itself to anti-social behaviour. In addition to shops, there are flats and community facilities such as a library. North Solihull Partnership are currently working on the early stages of a masterplan which looks at the centre itself and some adjacent sites. The question at this stage is how much of the existing centre needs to be demolished and how much should be refurbished. Reprovided sites will be a mixture of retail, community and residential; at this stage studies are looking to establish the amount of each.

The masterplan will be ready by summer 2017, although implementation timescales are unknown at this time. An understanding of the land required will come with the masterplan.

Craig Croft – before and after

Smiths Wood – before and after

The Partnership is leading on studies for new sites at Chester Road, and the Simon Digby Campus

North Solihull Partnership are leading on studies for new sites, using LEP funding. The partnerships is going out to tender on Chester Road study, in order to investigate the potential for development on five separate sites around a possibly reconfigured roundabout at the junction of Chester Rd and Moorend Avenue. We believe that there is clear potential for comprehensive redevelopment at Chelmsley Wood Town centre, creating the step change that the area needs

SMB and the HCA are looking at potential on the former Simon Digby Campus site. This has a local plan allocation for 200 homes. The site has constraints: it needs new access and flood alleviation, and there are possible issues around land ownership (the site is half owned by Solihull College, half Solihull Council) and noise attenuation, given that the site abuts the motorway. Mitigations using a combination of bunding and fencing are being explored.

We now turn to retail development opportunities. Retail is not just another economic sector – it is the 'shop window' of an area, and has a major role in creating perceptions

There is a structural shift under way in retailing. It is important to understand what this might mean for EBNS.

- **Polarisation: Most National comparison (non-food) retailers are increasingly concentrating their trading activities in a smaller network of large stores concentrated in high order centres, shopping malls and regional centres.** Since the downturn, the quality and diversity of the retail offer in the largest 'Top 100' centres has improved relative to small and medium town centres which have struggled to retain key anchor retailers. Out of centre retail parks have also become increasingly attractive to retailers since the downturn. The share of comparison retail sales conducted through town centre shops declined from 64% in 2002 to just over 40% by 2013 and out of centre superstores and retail parks have been one of the main beneficiaries (PBA 2013).
- **Digital technology: Digital technologies facilitating online sales have altered the ways in which retailers utilise physical floorspace and it is likely that new technologies will impact on the retail sector in unpredictable ways.** Retailers are increasingly utilising digital technology to drive footfall and in-store purchases. For example, providing handheld internet devices which provide customers with detailed product information and enable online customers to order a wider range of products in-store.
- **Growth of commercial leisure: Commercial leisure uses (such as cafes, bars, restaurants and cinemas) will constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space in secondary centres**. As shown in the table, Experian expect that leisure spending growth will reach 1.3% in the long-term (2026-2035) which is a reversal of the historic trend of declining per capita leisure expenditure (1997-2009). Nationally, spending on food and drink typically accounts for almost half of total leisure spending (37% in 2016). There is scope for town centres to capitalise on this trend. The development of a strong commercial leisure offer can help to increase footfall (particularly outside of core retail hours) and increase visitor's dwell-time in centres.
- **Restructuring of the convenience sector: since the economic downturn major convenience (food) retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi and Lidl have increased their market shares.** In January 2015, Tesco announced they would abandon the development of 49 'very large' stores and close 43 unprofitable stores (BBC 2015). The proportion of convenience floorspace accounted for by 'smaller stores' is forecast to increase from 37.6% in 2007 to 41.6% by 2017 (Verdict 2015). This shift has been driven by consumer behaviour; shoppers are now undertaking more regular smaller 'basket shopping' trips instead of a weekly food shop to a superstore.
- **Expenditure growth will slow: According to Experian, in the short-term, retail spending growth will slow sharply as a result of economic uncertainty related to the Brexit vote.** Convenience retail spending growth is forecast to slow from 0.0% in 2016 down to -0.9% in 2019 while comparison growth is forecast to decline from 3.3% in 2016 down to 1.0% in 2018. Leisure spending is also expected to slow quickly from 1.9% in 2016 down to 0.2% in 2018. In the long-term, retail sales growth will recover to reach 2.1% although this is well below the historic pre-recession rate of 5.1% due to the economic constraints posed by Brexit and the ongoing need for fiscal restraint.
- **Further bank closures will undermine high streets:** HSBC has shut the most outlets of any bank since the start of 2015, reducing nearly 30 per cent of its network across the country by closing 321 branches. The state-backed lenders Royal Bank of Scotland and Lloyds Banking Group shut 191 and 180 branches respectively. (FT, December 2016). The process is not played through: in February 2016, the Royal Bank of Scotland announced it would close 150 branches and cut more than 750 full-time jobs, citing a "dramatic shift" towards mobile and online banking (FT, March 2017)

These trends accentuate a growing failure of town centres and retail parades to successfully adapt to change, as:

- Some retailers are not surviving at all, whilst many need fewer shops with a bigger footplate (some need no shops),
- Major players care about their neighbouring retailers, and are able to dictate 'pick lists' on which retailers they would like to be situated next to.

Growth per capita	Annual average growth (%)				
Period	**1997-2007**	**2008-2011**	**2012-2015**	**2016-2025**	**2016-2035**
Total retail	5.1	-0.5	2.1	1.8	2.1
Convenience	-0.3	-3.2	-1.0	-0.1	0.1
Comparison	8.0	0.6	4.1	2.7	3.0
Leisure	-0.9	-3.3	1.7	1.2	1.3

Dataset: : *Summary of long –term retail expenditure growth*
Date: *November 2016*
Source: *Experian Retail Planner Briefing Note 14*

If we wish to bring a step change in the way that retail performs in EBNS, we need to think about how emerging trends can combine with changing local circumstances to create investment opportunities

We have to think in terms of what will happen to bring about a step change in the way in which the area functions. These events can be positive and/or negative: for example, investment in one town centre could improve its performance but that improvement could be at the expense of another nearby centre. This will be an important issue to balance in the study area.

With reference to the study area, investment in transport infrastructure has the potential to bring about a step change in the way in which people use the existing structure of town centres, as well as on out-of-centre provision. This applies equally to new connections as to improvement to existing connections. The key interventions are:

-New transport links i.e. the Metro and SPRINT buses

-Greater frequency of local services on existing fixed rail links

-New stations on the Birmingham – Tamworth line

In looking at the potential for these investments to improve the performance of current provision we have to think about proximity. They will have the greatest direct impacts on the retail and town centre provision that is in closest proximity of the routes and critically stations or stops.

Evidence presented here suggests that the relatively limited take-up of top-up convenience shopping in the study area is due to the lack of critical mass i.e. low density residential population with a large number of small centres providing too much space to serve their needs. A key opportunity of improved public transport will be to create key activity nodes which would be capable of supporting additional retail and town centre uses. However, proximity is key; therefore those centres closest have the potential to benefit the most.

Other factors could include developments within (or outside town centres) to improve the performance. For example, the redevelopment of Shard End local centre to include a convenience store, other shops and adjacent car parking, has improved the health of the centre. Less direct investments, for example the introduction of a major new employer in the local area also has the potential to drive change. There is the potential for higher density residential to increase demand in the study area.

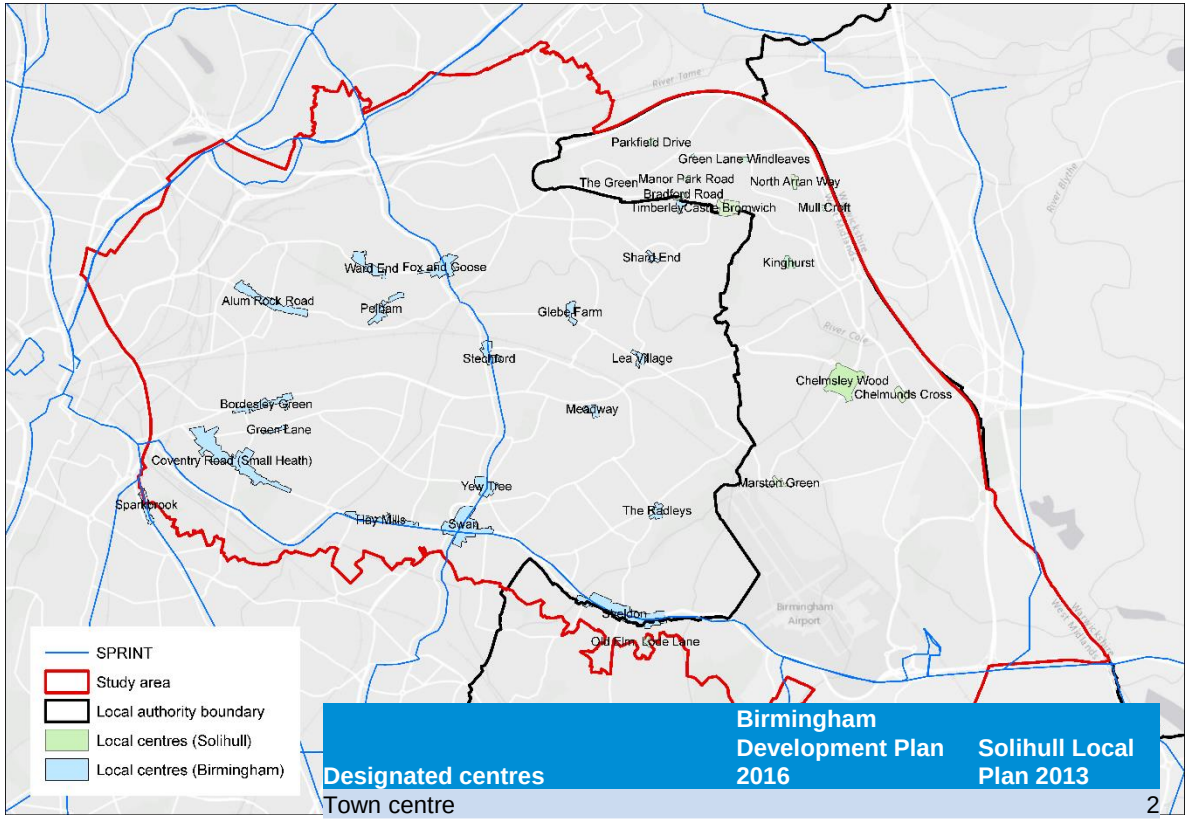
There are two main types of retail centre in EBNS: linear town centres which are located along the main roads through the study area, and purpose-built suburban shopping parades

We have looked at the existing retail provision to understand its role and function in the study area and potentially whether it serves a wider role outside the study area, focusing on the definition of town centres as set out in the NPPF. We therefore do not look in detail at local shopping parades.

Across the EBNS area, there are a combination of town, district and local centres, shopping parades, as well as undesignated out-of-centre locations including retail parks, food stores and leisure destinations. There are 21 designated centres in the study area, ranging in size and position in the retail hierarchies for the two authorities.

There are two main types of centre: linear (and often very long) town centres which are located along the main roads through the study area; and purpose-built suburban shopping parades, which have larger units and often dedicated car parking. They range in size from 13 units (Shard End) to 275 units (Small Heath) (BCC and SMBC health checks 2016 and 2014); and their geographic spread across the study area is uneven.

Location of retail centres in EBNS



Designated centres	Birmingham Development Plan 2016	Solihull Local Plan 2013
Town centre		2
District centre	5	
District growth centre	1	
Large neighbourhood centre	2	
Local centre		3
Small neighbourhood centre	8	
Total	16	5

Dataset: *The type and location of retail centres in EBNS, according to the relevant local planning document*
Date: *2017*
Source: *Birmingham Development Plan 2016; Solihull Local Plan 2015*

Most EBNS town centres cater to day-to-day residential needs, whilst Birmingham, Solihull and out-of-town centres take bigger purchases. There has been limited recent investment in town centres

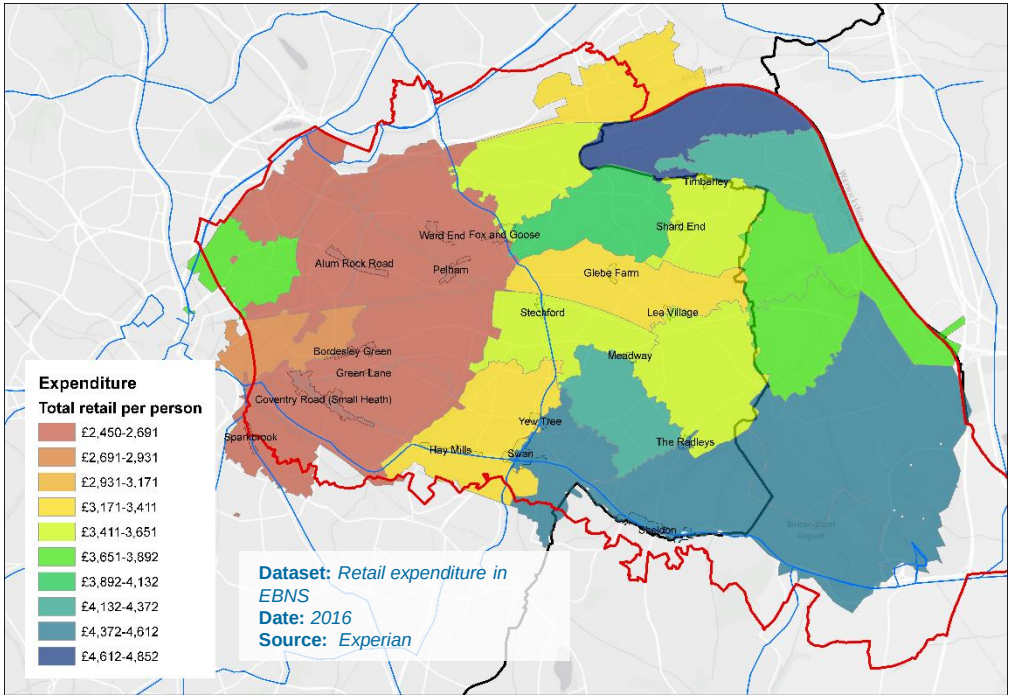
The existing town centres are primarily catering to the local population in meeting day-to-day residential shopping needs. This is reflected in the latest household surveys undertaken on behalf of BCC and SMBC (Birmingham Retail Needs Assessment 2009 (Hollis Vincent) and Solihull Retail Study 2011 (DTZ)), which only record a handful of the centres as attracting significant market share beyond their home zones; the resultant turnovers of these centres is low, and largely limited to convenience goods. **The wider retail and town centre geography directly informs this, with the proximity of Birmingham city centre and also Solihull town centre serving to limit the comparison shopping function of existing provision.** This is reflected in the low market shares achieved by most of the centres in the study, even in their home zones. Typically it is only where there are larger food stores in centres that any substantial comparison market share is recorded. A substantial proportion of available spending on non-food items is made outside the study area, leaking away to these larger destinations, so too is spending in out-of-centre retail parks.

It is also clear that the level of available spending in the study area is constrained: as shown in the map, per capita retail spending levels in 2015 were greater in the western part of the study area. However, in overall terms, the average per capita retail expenditure for the study area is 20% lower than the Birmingham and Solihull average at £3,428 per annum compared to 4,226 per annum in 2015 (Experian Retail Planner MMG3).

There has been very little direct investment in the majority of these centres in recent years; but where investment has taken place, the results have been successful (Shard End and the Swan). Furthermore, there has been limited investment which could indirectly benefit the centres.

Alongside the network of allocated centres, there is a significant quantum of out-of-centre retail and leisure space in the study area. There are large out-of-centre stores outside Castle Bromwich and Small Heath. Comparison provision outside the town centres is focused on the Fort area to the north of M6 which includes four major retail and leisure parks. Other notable provision is a retail park outside Stechford district centre. In relation to commercial leisure, Star City and the cluster of uses at the NEC are the main destinations in the study area.

Retail expenditure per person (2015)



Out-of-centre convenience retailers

Out-of-centre comparison and leisure destinations in EBNS	Units	Multiples	Food & drink
Birmingham Star City	44	12	13
Fort Parkway	50	43	7
Kingsbury Road Leisure Park	2	0	0
Ravenside Retail Park	32	24	0
Trident Retail Park	5	1	3
Stechford Retail Park	13	11	1
Birmingham Airport	71	59	13
Total	217	150	37

There is unlikely to be a major shake-out in convenience sector retail in EBNS, but equally, there is unlikely to be much growth

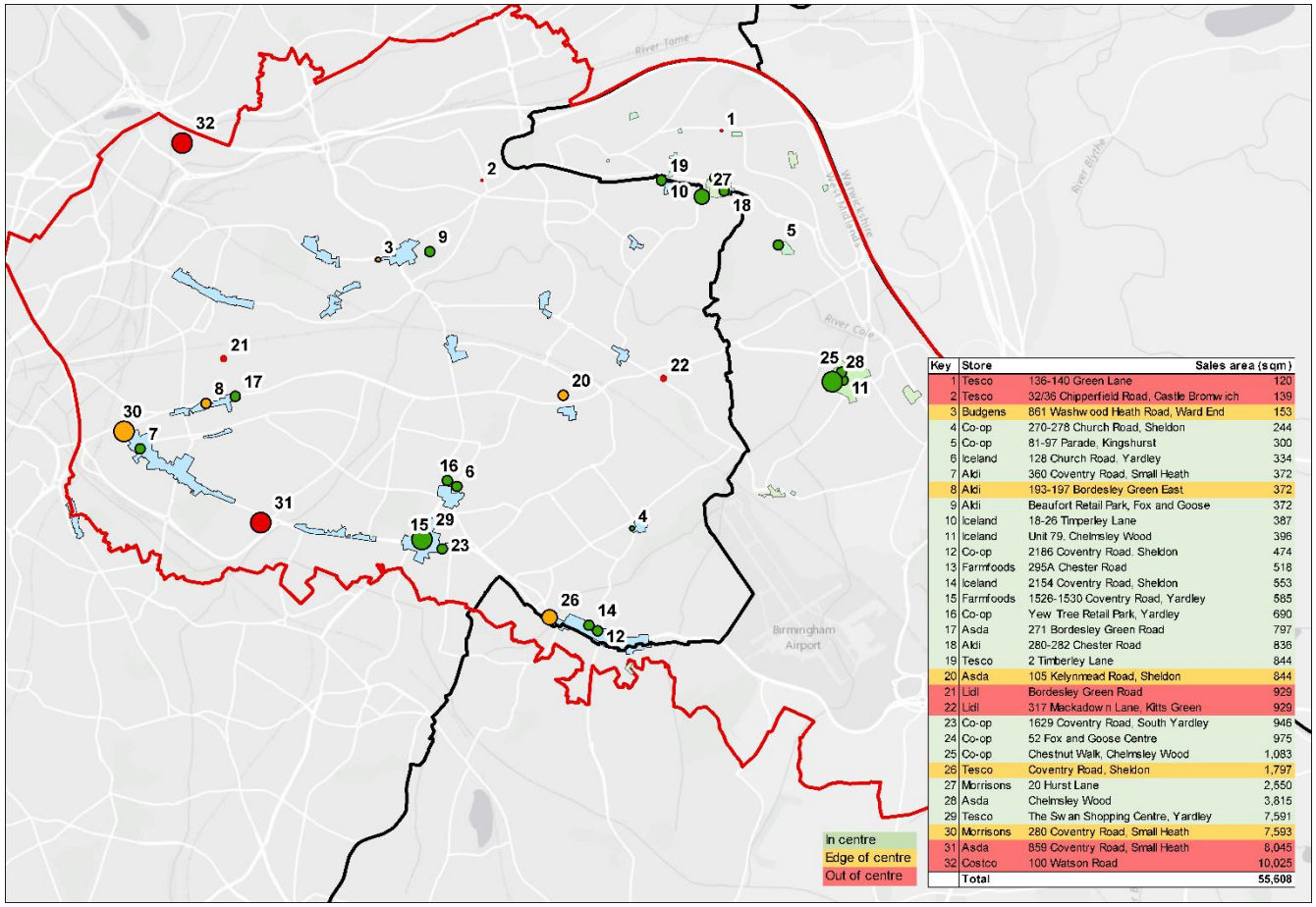
There is a well-developed network of convenience shopping provision across the study area. The majority of these are within existing town centres which is beneficial to their vitality and viability.

While there has been some restructuring in this sector, there is limited evidence of this in the study area. This is in part because of the specialist nature of independent retail provision in some centres e.g. Bordesley Green, Alum Rock/Saltley and Small Heath are tailored to local communities.

Additionally, the presence of major arterial roads running through the study area means that there are a number of large food stores with adjacent car parking, such as at Castle Bromwich and Hay Mills. In fact, running counter to the trend of more top-up shopping trips is the opening of a substantial new large-format Tesco store at the Swan. This allows the national multiples to maintain a certain level of footfall to operate these stores.

Population growth will also underpin the convenience sector. Because growth in convenience spending per head of population is now flat, it is only through population growth that significant need is generated.

National convenience operators in EBNS by location and showing in centre, edge of centre and out of centre status



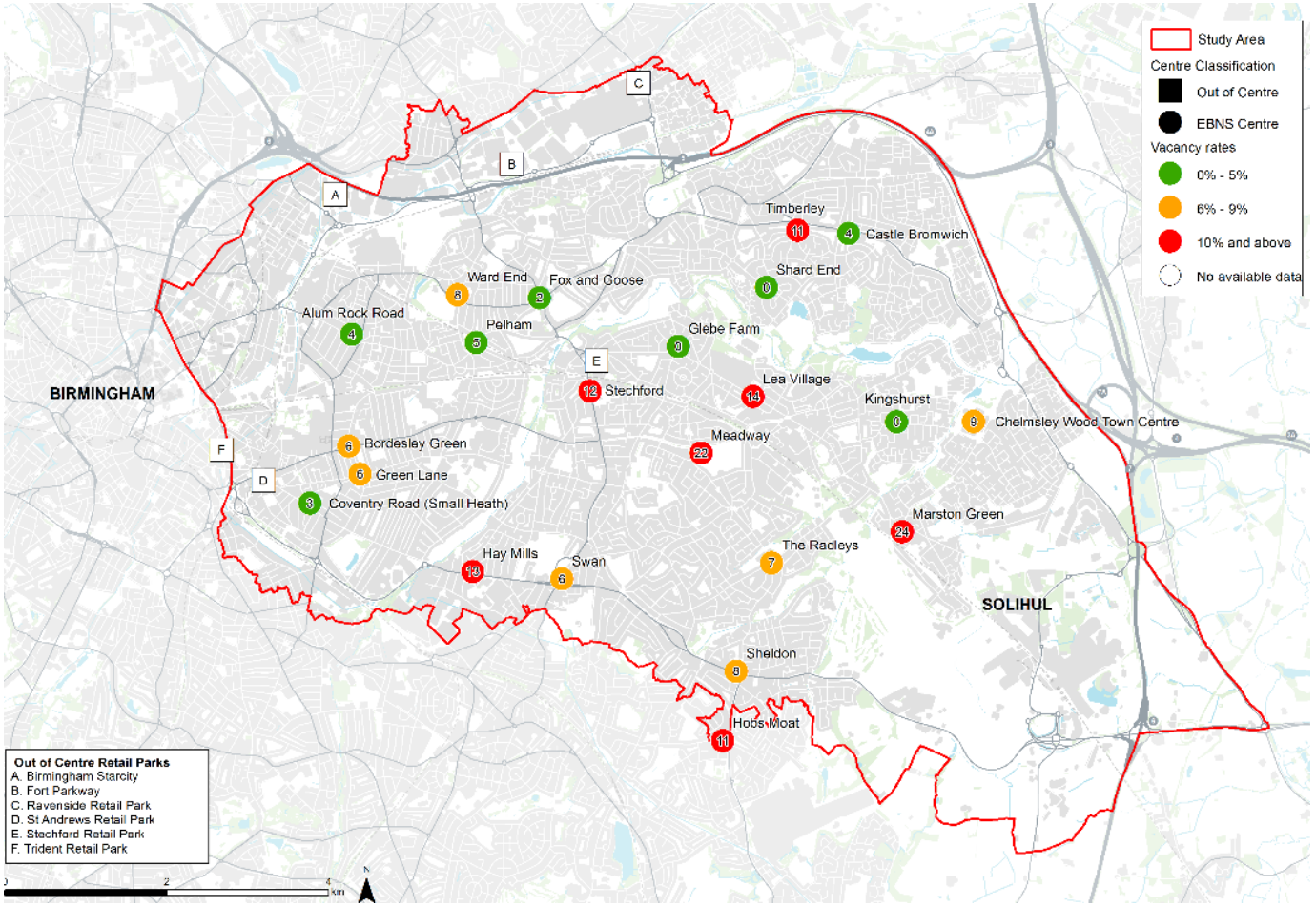
Key	Store		Sales area (sqm)
1	Tesco	136-140 Green Lane	120
2	Tesco	32/36 Chipperfield Road, Castle Bromwich	139
3	Budgens	861 Washwood Heath Road, Ward End	153
4	Co-op	270-278 Church Road, Sheldon	244
5	Co-op	81-97 Parade, Kingshurst	300
6	Iceland	128 Church Road, Yardley	334
7	Aldi	360 Coventry Road, Small Heath	372
8	Aldi	193-197 Bordesley Green East	372
9	Aldi	Beaufort Retail Park, Fox and Goose	372
10	Iceland	18-26 Timperley Lane	387
11	Iceland	Unit 79, Chelmsley Wood	396
12	Co-op	2186 Coventry Road, Sheldon	474
13	Farmfoods	295A Chester Road	518
14	Iceland	2154 Coventry Road, Sheldon	553
15	Farmfoods	1526-1530 Coventry Road, Yardley	585
16	Co-op	Yew Tree Retail Park, Yardley	690
17	Asda	271 Bordesley Green Road	797
18	Aldi	280-282 Chester Road	836
19	Tesco	2 Timberley Lane	844
20	Asda	105 Kelynmead Road, Sheldon	844
21	Lidl	Bordesley Green Road	929
22	Lidl	317 Mackadown Lane, Kitts Green	929
23	Co-op	1629 Coventry Road, South Yardley	946
24	Co-op	52 Fox and Goose Centre	975
25	Co-op	Chestnut Walk, Chelmsley Wood	1,083
26	Tesco	Coventry Road, Sheldon	1,797
27	Morrisons	20 Hurst Lane	2,550
28	Asda	Chelmsley Wood	3,815
29	Tesco	The Swan Shopping Centre, Yardley	7,591
30	Morrisons	280 Coventry Road, Small Heath	7,593
31	Asda	859 Coventry Road, Small Heath	8,045
32	Costco	100 Watson Road	10,025
	Total		55,608

Source: IGD, VOA and planning application data

Vacancy rates are high in some EBNS centres

The map shows the most recently published data on vacancy rates for centres in EBNS. For Birmingham centres the map provides a snapshot of the vacancy rate in 2016 and for Solihull centres the data is from 2011. The best performing centres in terms of vacancy rates are Glebe Farm, Kingshurst and Shard End. Each of these centres were fully occupied at the time the latest survey was undertaken. At the other end of the spectrum Lea Village, Meadway and Marston Green are the worst performing centres in terms of vacancy rates. Each of these centres had a vacancy rate of between 14% and 24% at the time the latest survey was undertaken.

Vacancy rates in EBNS centres (%)

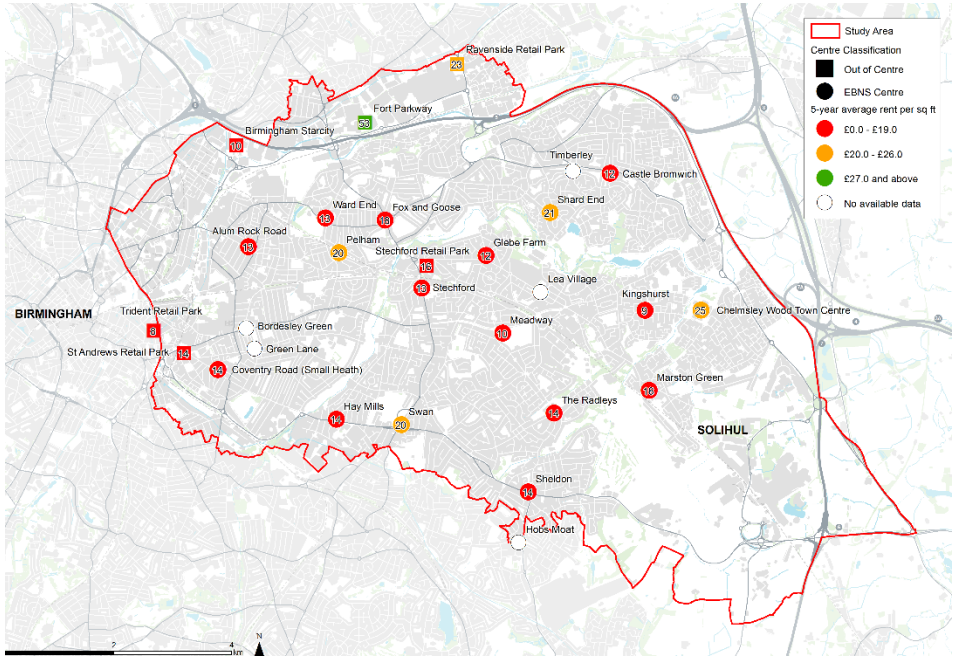


Dataset: *Use Types and Vacant Previous Use within Primary Shopping Areas - Resurvey 2015-16* [1]
Date: *2016*[1] *and 2011*[2]
Source: *Use Types and Vacant Previous Use within Primary Shopping Areas Resurvey 2015-16*[1] *and Solihull Retail Study Health Check Appendices 2011*[2]

Retail rents are relatively low, and retail properties frequently spend a long time on the market

EBNS five-year average rents (£ per sq ft)

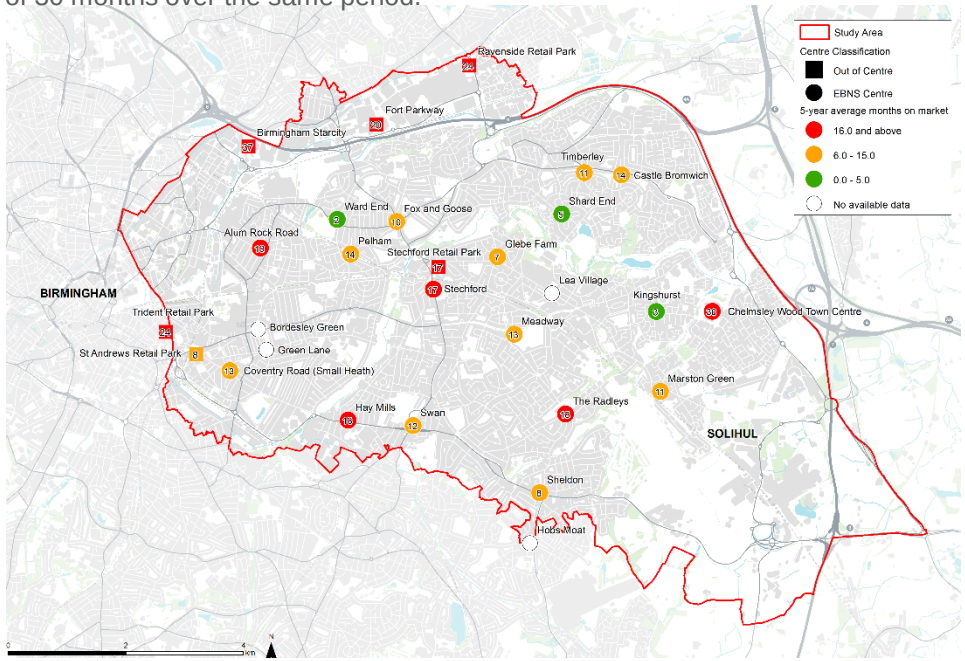
The map below shows the five year average rents for EBNS centres and retail parks within the study area for the years 2012-2017. According to Costar, the Fort Parkway Shopping Park has the highest rent at £53 per sq ft. Chelmsley Wood has the highest rent at £25 per sq ft. Rents levels in the EBNS study area are still significantly lower than central Birmingham, according to Costar, five year average rents for the Bullring Shopping Centre sub-market were recorded at £97 per sq ft. Compared to this, the retail locations in EBNS with the lowest rents are Kingshurst centre and Trident Retail Park at £9 per sq ft and £8 per sq ft respectively.



Dataset: *Five-year average rent per sq ft*
Date: *2017*
Source: CoStar (2017)

EBNS five-year average number of months on the market

The map below shows the average number of months that vacant retail units were on the market for EBNS centres and retail parks within the study area over the period between 2012-2017. The least amount of time available retail units properties spend on the market is an indicator of stronger operator demand for retail space. According to Costar, available retail units in Ward End were on the market for the least amount of time at 2 months on average. Again, the data shows that demand for retail floorspace in central Birmingham is much stronger than in the EBNS study area. According to Costar, available retail units in central Birmingham were on the marker for less than 1 month. Compared to this, units in Chelmsley Wood were on the market for an average of 30 months over the same period.



Dataset: **Five**-*year average months on market*
Date: *2017*
Source: CoStar (2017)

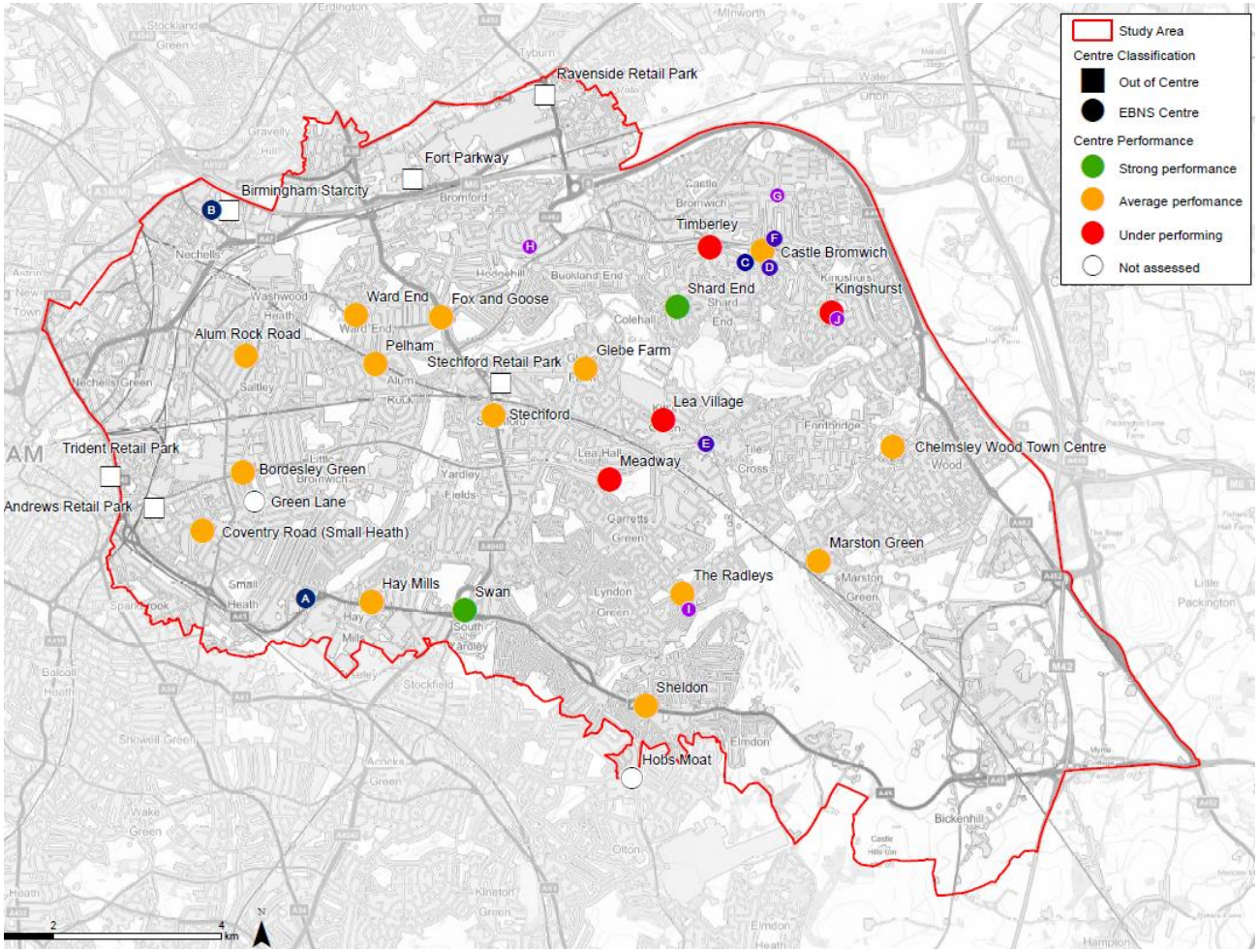
Overall, only a small number of EBNS retail centres are performing well

We have assessed the performance of the centres using a traffic light ranking. In doing this, we have had regard to the scale of the centres; for example, a small local centre will fulfil a very different role to a town centre. The centres are categorised as follows:

- **Green – good health**. Low vacancies, diversity of provision in terms of retail, services and other town centre uses, good quality unit stock and environmental quality. e.g. Shard End: the centre is well used and includes the range of services typical of a centre of this scale, no or limited vacancies, it has adjacent car parking and the environmental quality is high.
- **Amber – underperforming**. Poorer environmental quality, limited diversity of offer, some vacancies in better quality stock. e.g. Bordesley Green: although there is a diverse retail offer in the centre and units are relatively well-occupied, the environmental quality is poor due to traffic and the retail stock is shows limited signs of investment.
- **Red – poor health**. High and persistent vacancies, overconcentration of uses such as betting and charity shops, A5 units, poor environmental quality e.g. Kingshurst: the centre has high vacancies and its environmental quality is poor.

Most of the centres in the study area are classed as underperforming. We have only identified two as being healthy; both these centres have received large-scale investment in recent years and it is likely that it is this which has brought about this change. The majority of centres have been identified as underperforming.

Health of retail centres in EBNS



For EBNS, evidence suggests that comparison retailing at Chelmsley Wood and other smaller centres could be eroded over time due to the effects of polarisation and multi-channel retailing. Commercial leisure investment in EBNS is likely to remain muted

Polarisation is likely to undermine Chelmsley Wood and other smaller centres

Of the centres in the study area, this is particularly relevant to Chelmsley Wood. Many of the stores that would traditionally anchor a secondary centre of this type are no longer on the high street (e.g. Woolworths) and in their place there are often discount comparison retailers. This serves to reduce the role of the centre in meeting higher order comparison needs, with shoppers increasingly travelling to either Birmingham or Solihull, or to out-of-centre stores at The Fort and Stechford Retail Park. It also means that, given the scale of centres in the study area, there is a real challenge to secure major comparison retailers – which would act as key attractors and therefore drive footfall within the centres. For this reason, it is unsurprising that it is BCC that is advancing the regeneration of Meadway district centre and that the investment made by the private sector (e.g. Ellandi as owners of Chelmsley Wood) has so far been limited.

Digital technology effects are likely to be limited to the larger comparison shopping areas (Chelmsley Wood and the retail parks), but there may be a growing demand for click and collect facilities in smaller centres

Because this is most relevant in relation to comparison shopping, it is less significant for the study area at the moment. This is because comparison shopping provision is limited to a few larger destinations, whether in or out of centre (Chelmsley Wood, Stechford Retail Park, St Andrews Retail Park and Hay Mills), the direct impacts have been limited.

However, the rise of multichannel shopping presents some opportunities for the study area in terms of the form of click and collect facilities within smaller centres as a way of driving footfall.

The loss of high street banking may erode high street viability

As more people switch to internet banking and there are mergers in the banking sector, banks and building societies are reviewing their portfolios to reduce their high street presence. For many of the centres in the study area, the potential closure of banks and building societies risks a reduction footfall in the centres and also leave vacant sites that are often challenging to fill, particularly if they comprise older premises.

Commercial leisure investment in designated centres is likely to be muted: available spending power is likely to remain low for the medium term

There is currently limited leisure provision as part of the town centres within the study area. The Fort area at the northern part of the study area includes the Star City leisure complex which is one of the main commercial leisure hub. However, it is an out-of-centre destination which is likely to be made more accessible through the investment in new stations on the Birmingham to Tamworth line and Kings Heath line to the south. Similarly, while the NEC represents a further focus of leisure provision, its attraction far exceeds the local area.

In relation to designated centres, while there are some leisure facilities, these are public sector-led e.g. the new swimming pool at Stechford, there is little sign of commercial leisure investment. This is likely to be because there are not sufficient returns to attract commercial operators to invest in the area.

Given the importance of the food and beverage sector in commercial leisure consumption, the study area has very limited provision. Centres such as Bordesley Green, Alum Rock/Saltley and Small Heath all have strong restaurant offers; however that offer is a characteristic of the local population which those centres serve and is uninfluenced by recent trends to increase the range in town centres.

Plainly, as with retail expenditure levels, the viability of commercial leisure facilities is a function of the available spending; in this case it is below the average City and Borough levels (Experian). Larger scale leisure uses are successful at the NEC and in the Fort area because of their strategic accessibility i.e. because they can draw from a much wider than local catchment. This is not an attribute shared by many of the existing town centres; however, with infrastructure improvements, this could change.

We have looked at what the evidence suggests around possible approaches to the town centres in EBNS

We have identified three possible approaches to planning for the future of the town centres within the study area.

Business as usual with pro-investment policies – for centres that are either performing to the level expected given their current scale and function or for those centres which are remote from any major planned investment, including new transport links. An example of this is Pelham: it is performing adequately and no major investment is planned that would result in a shift in role/function.

Consolidation, modernisation and repurposing – centres that have too much space or which are close to other centres that better meet needs or have more potential for future improvement. An example of this is Glebe Farm, which although performing adequately is very close to Lea Village. Given Lea Village's accessibility will be significantly improved by the Metro, growth should be focused there and Glebe Farm allowed to contract.

Intensification with redevelopment – centres that are located at those nodes subject to connectivity improvements. Chelmsley Wood is a key opportunity given it is in a single ownership and will have a Metro stop at it; similarly the Meadway will benefit from improvements to its accessibility so combined with redevelopment, it has the capacity to play a much more significant role in the retail hierarchy. Both Marston Green and Stechford have the potential to trade more intensively if higher frequency train services into central Birmingham were introduced.

We have applied these categories to each of the EBNS centres in the table to the right.

Business as usual with pro-investment policies?	
Alum Rock/ Saltley	Performing relatively well and unlikely to be impacted by the planned investment. Protect its existing role.
Castle Bromwich	No specific interventions planned in this area. Seek to protect its existing role.
Fox and Goose	No specific interventions planned in the area and recent investment from opening of the new Tesco store.
Pelham	No specific interventions planned in this area. Seek to protect its existing role.
Shard End	Subject to recent redevelopment.
Swan	Subject to recent redevelopment.
Consolidation, modernisation and repurposing?	
Bordesley Green	Truncated along the main road – consider tightening the boundaries
Glebe Farm	In close proximity to other provision – consider managing contraction.
Hay Mills	Truncated along the main road – consider tightening the boundaries
Kingshurst	Consider deallocating and redeveloping
Sheldon	Truncated along the main road – consider tightening the boundaries
Small Heath	Truncated along the main road – consider tightening the boundaries
The Radleys	Consider tightening the boundaries to reduce size and number of A5 uses
Timberley	Severed by main road and close to provision at Castle Bromwich – consider tightening boundaries
Ward End	Consider tightening boundaries at the periphery.
Intensification with redevelopment?	
Chelmsley Wood	In single ownership and to have a Metro stop in close proximity
Lea Village	To have a Metro stop in close proximity
Marston Green	Greater frequency rail links could increase footfall
Meadway	Subject to major regeneration plans and in close proximity to a Metro stop
Stechford	Greater frequency rail links could increase footfall

A range of policy responses could accompany these local approaches. All would be intended to accerate investment in, and modernisation of, retail centres

In planning for retail and town centre uses in the EBNS area, there are a range of policy options available to secure these objectives of protecting, consolidating or intensifying existing town centres. So while there are adopted town centre hierarchies in place for both Birmingham and Solihull, their adoption does not take account of the potential changes that could be secured with the improved transport links in the area. The Councils could consider exploring the following options.

- **Local Development Orders** – explore the use of LDOs to shape change and accelerate its delivery. This could include promoting intensification in existing centres but equally it could be focused on managing the contraction of others.
- **Permitted development and repurposing** – making local businesses aware of the options available to them without the need for planning permission and taking a positive stance on prior approval applications. The widening of legislation to allow greater flexibility was introduced by Government in part to allow the less fit-for-purpose stock to 'fall out' of the market. This includes allowing retail to residential conversions (A1 to C3) and retail premises to convert restaurants (A1 to A3 conversions). District centres and retail parades could be repurposed, to be centres of living, working and leisure. A diversified range of town centre users will be required, with retail floorspace being proactively reassigned to residential, community, employment and other uses.
- **Compulsory purchase** – fragmented ownership is often the main barrier to delivering change in town centres. BCC is already exploring this route with Meadway, where a CPO has been made to allow regeneration of the centre, and BCC has used CPO powers in the past to facilitate regeneration of the Shard End and Swan centres. The benefit of single ownership is it allows greater curation of the retail offer and reduces the risk of there being a 'race to the bottom' in order to simply secure a tenant - which can lead to the overconcentration of A5 uses, betting shops and charity shops in many of the centres in the study area.
- **Reviewing the retail hierarchy and town centre boundaries** – considering de-designating some smaller centres in the context of the overall network of centres and tightening the definition of the core of the centres and allowing the peripheral parts to fall away. In order to look at the study area as whole, it would be worth the two authorities undertaking a co-ordinated review.
- **Car parking strategy reviews and traffic calming** – a careful review of parking (which ensured it did not damage trade) could be considered. Traffic calming could improve some centres' poor environmental quality.

Delivering physical change

Key issues

- Triggering market regeneration processes
- Focusing public and private investment
- Delivering and managing change
- Creating a cross-sector ‘growth coalition’

Why is this issue important? A brief review of the literature and local context

Clear and consistent leadership has been long identified by various academic studies of regional and city growth as being critical to growth, through its effects on de-risking both public and private investment. Prof Michael Parkinson's conclusions over a decade ago bear re-reading. He states that "a key characteristic of successful cities is their strategic capacity to exploit their assets," and that leadership needs strategy, stating that "Manchester in particular has a very robust strategy". The Treasury (2011) states that the past decade has seen increasing recognition of the need for coordination and strategic decision-making across areas.

Evidence also shows that good leadership is essential to secure quality outcomes from transport investment. Work for the Independent Transport Commission suggests that successful outcomes from a programme of high speed rail implementation depend on the presence of a number of success factors which are dependent on high level political and officer commitment at the right scale, depth, and breadth. These are

- Common purpose – shared vision between partners
- Connectivity – integrating different modes, and connecting labour markets
- Commitment – programme spanning more than a generation and lasting several economic and political cycles
- Collaboration – to work across disciplines, boundaries and interests in order to compete in bigger markets
- Communication – to create lasting relationships
- Control – possibly taking the role of master developer, and controlling delivery through regulation and participation.

The right sub-regional governance structures are important. The spatial scale over which decisions are made matters to growth. Research at European level (Cheshire & Magrini, 2005) shows that where the level of decision-making is a good fit with an area's economic footprint, this associated with better economic performance.

Evidence suggests that the public sector might usefully sponsor a pro-active and innovative policy development and delivery process. NESTA work (2008) suggests that policymakers should think in terms of an "AC/DC model". Absorptive capacity (AC) allows a place to identify, value and assimilate new knowledge. Absorptive capacity is made up of three elements - a) the capacity to access networks of knowledge and innovation; b) the capacity to anchor external knowledge from people, institutions and firms; and c) the capacity to diffuse new innovation and knowledge in the wider economy. Development capacity (DC) allows a place to either create or exploit new knowledge.

The changing political and economic context for local authorities is tending to force the public sector to adopt a more entrepreneurial development role, using and adding to its own assets. Continued public sector funding austerity compels local authorities to be increasingly ambitious in the way that they raise revenue. A number of solutions arise from possible development in EBNS, and arise from the possibilities generated through increased Council Tax receipts (driven by underlying household growth) and Business Rates in order to continue to serve the area and its residents. Authorities could commission a review of public sector property to develop an understanding of the scale and potential of the public sector property portfolio in the EBNS area, with particular focus on the potential to a more entrepreneurial approach to the development of land around future infrastructure assets. We anticipate that such an exercise would show how better use of assets would deliver more housing in total, more affordable housing, new public sector services and a financial return to local authorities.

The evidence suggests that there is major untapped potential in EBNS. New jobs and infrastructure can create structural change – but we need to trigger the process of regeneration so that self-sustaining market processes can take change forward

This is a baseline report, and does not attempt to anticipate future stages of vision and strategy work.

The evidence suggests that a step change in performance is possible for the EBNS area: the combination of real economic opportunities arising from new labour demand, and planned connectivity improvements, will create the conditions for this change.

However, our reading of the evidence suggests that delivering this scale of change could require quite an extensive and far-reaching review of existing strategy and policy. EBNS will need to challenge accepted ways of working across a range of delivery 'silos', new delivery structures, and create a new set of ideas about what is possible in the area.

Getting change to happen requires us to have a basic starting idea of how the broad process of change might be successfully delivered. At the risk of drifting into territory that will need to be mapped out by the vision and strategy, our view – informed by a reading of the history of regeneration policies in this area and elsewhere – is that spreading the 'jam' too thinly would be a mistake: it will do very little to fundamentally change market perceptions of investment in EBNS. This is critical given that market perceptions will be critical if we are to trigger long term change in an age of austerity.

We are likely to need to pursue a 'tipping point' approach to regeneration. Private development markets will need to work harder and faster. The public sector needs to assist this process by providing de-risked, decontaminated sites which demonstrate that new marketplaces exist. Once the demonstrator sites have changed market perceptions the market will be ready for bigger challenges.

We wish to see a set of mutually reinforcing processes in which success breeds success, in a form of chain reaction. This means that, somewhat counter-intuitively, we suggest that we may need to avoid a "worst first" approach, and instead show development markets that it is possible to make a success of development in EBNS. Once the demonstrator growth sites have changed market perceptions the market will be ready for bigger challenges, growing values out of these stronger areas. (We are acutely aware, however, that one of the weaknesses with the traditional approach to evidence bases in planning - around, for example, employment land and retail assessments - is that it can work to roll forward past trends).

The question, then, is where to start in triggering off these processes of change. We need to create a process which can identify specific places where we might start the process.

EBNS could use best practice from London. London puts together brownfield land opportunities and new transport investment to create 'Opportunity Areas' focusing public investment and private developer interest

The evidence suggests that EBNS needs a mechanism to help de-risk investment by driving out information and building a shared understanding of delivery between public and private sectors about investment opportunities in the area.

We have looked at what the evidence from other areas tells us about possible approaches to this issue. In London, a very complex planning situation is simplified by the creation of London Plan "Opportunity Areas" and "Intensification Areas".

The Opportunity Areas are not simply the largest London development sites. Critically, they are large brownfield sites which are to be reinforced by improved transport investment, and so will provide a valuable supply of land to accommodate growth. They are derived from an integrated land use and infrastructure investment strategic which is able to operate in a mutually reinforcing fashion.

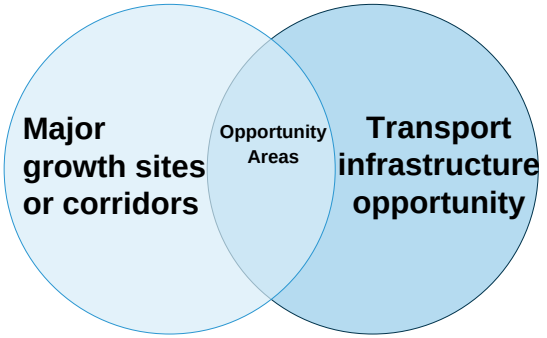
Intensification areas are typically built-up areas with good existing or potential public transport accessibility which can support redevelopment at higher densities. They have significant capacity for new jobs and homes but at a level below that which can be achieved in the opportunity areas.

Each Opportunity Area is masterplanned (with the creation of an Opportunity Area Planning Framework) which is then delivery tested with a Development Infrastructure Funding Study (DIFS) which looks at infrastructure requirements, costs and funding, and sets these against development viability and build-out trajectory. This de-risks development, both for public and private sector investors. Effectively, EBNS has already seen this approach in action at the UK Central site in Solihull.

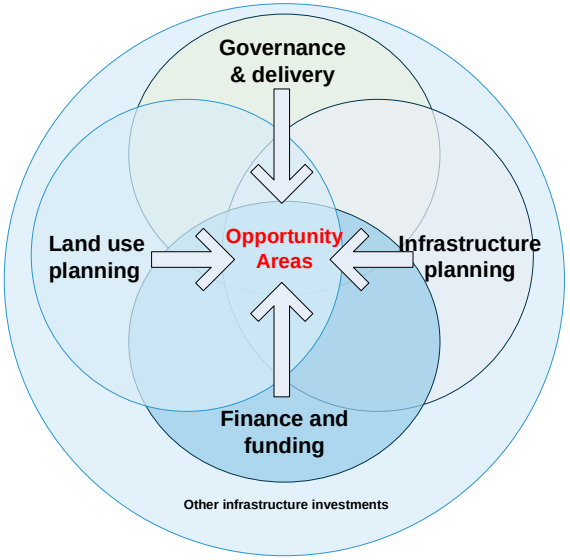
At some point, a similar approach could be taken in EBNS. It is likely that EBNS will need to identify a list of sites which have both significant development potential strategic importance, plus a good relationship to transport investment (or at least, spare transport infrastructure capacity). These sites could then become the focus of concerted efforts to get the sites moving. In order for growth to ripple out from the Opportunity Areas, each authority will need to understand what complementary planning and connectivity is required to link these to the wider areas. The EBNS will need to take responsibility for driving value and connectivity to surrounding areas.

Having arrived at an agreed list of Opportunity Areas, EBNS will need to build up a package of governance, land use and infrastructure planning, and funding and financing support at each Opportunity Area. The objective must be to create development momentum at the sites. This may require land assembly, land remediation, new policy, and/or assistance with the relocation of some of the existing uses, particularly industrial activities.

The elements which create the London Opportunity Areas



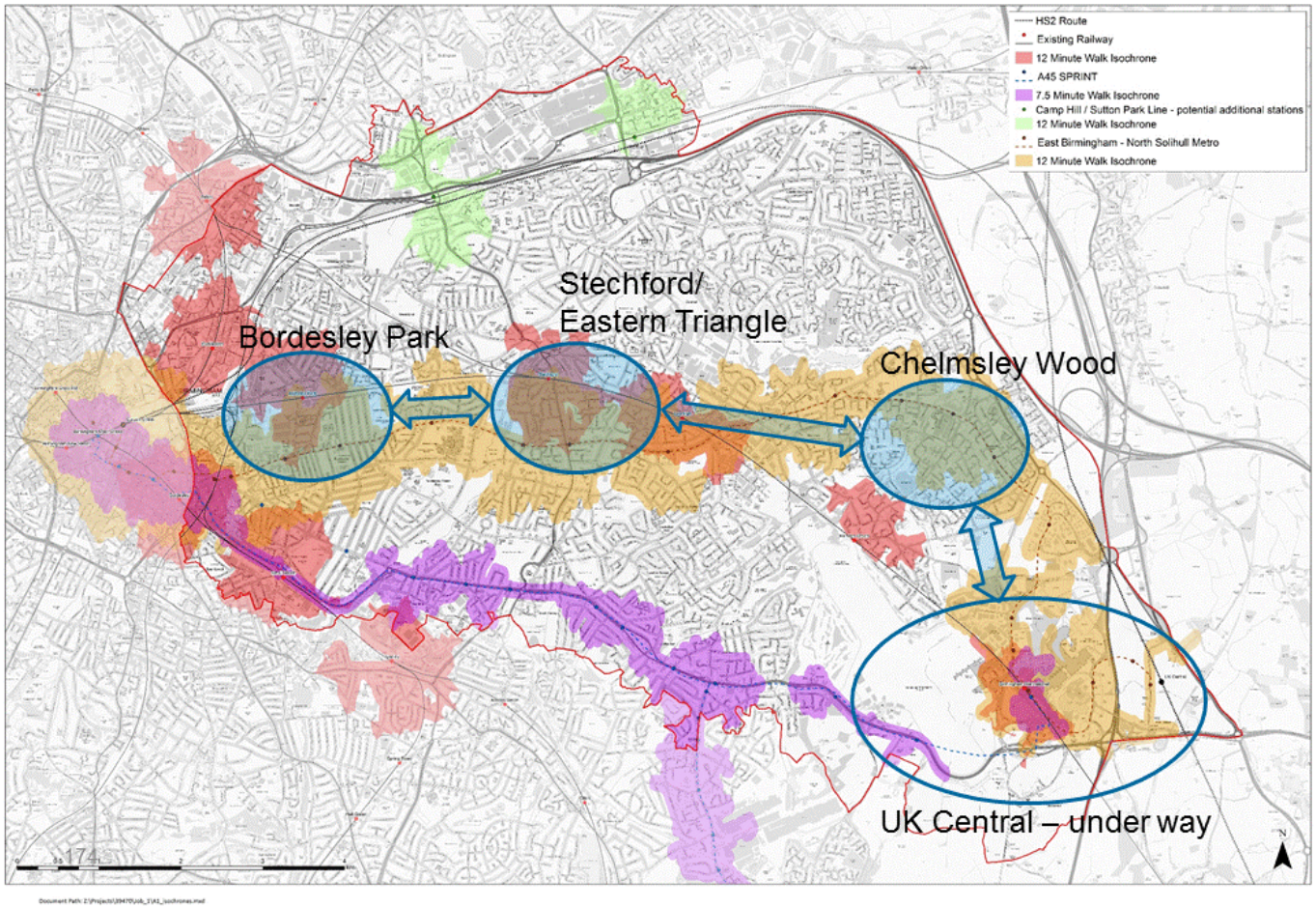
Brigading policy, management and funds around Opportunity Areas



Putting together an analysis of the factors above and London experience with Opportunity areas suggests that we could arrive at three new ‘Opportunity Areas’ that could help EBNS to make the step change it needs. (UK Central is effectively already an Opportunity Area)

We have set out the possible Opportunity Areas on the map. We advance these concepts tentatively, in the knowledge that a spatial strategy is not a substitute for the land use planning process. The intention here is only to set out some possible high level direction of growth. This has been undertaken in advance of any consultation.

UK Central is effectively already an Opportunity Area - it has a high level masterplan, a delivery team, an infrastructure study, an understanding of viability and a market profile.

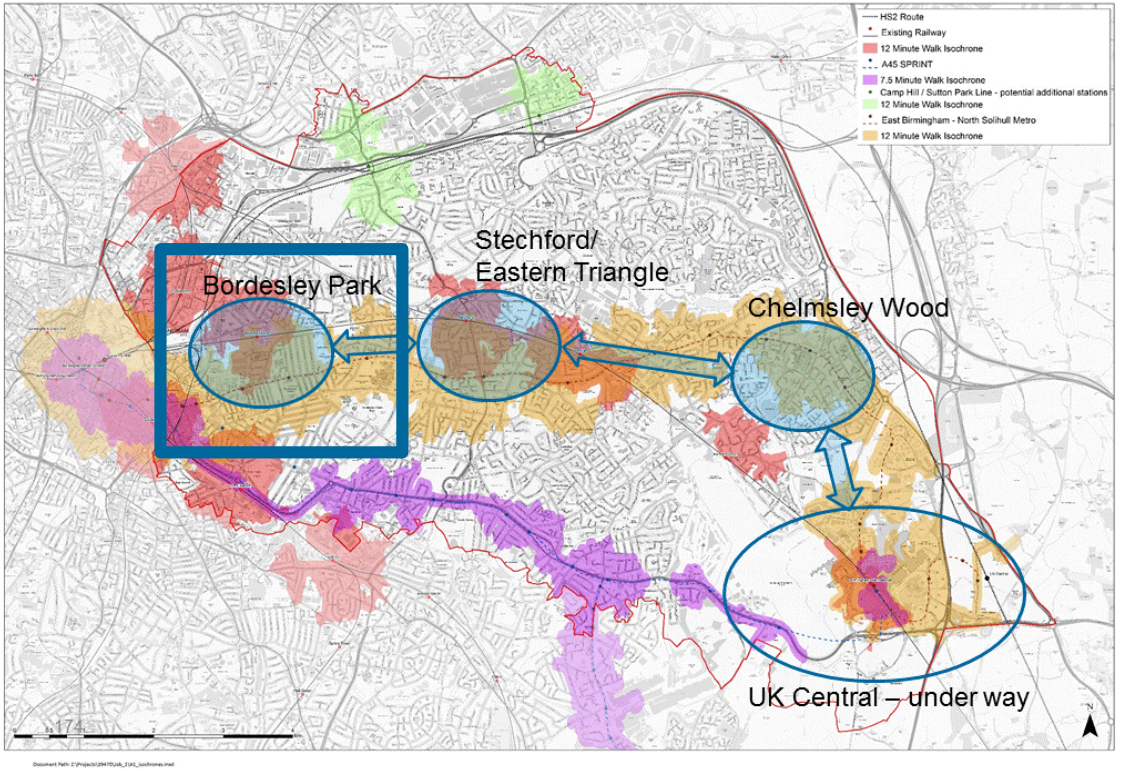


Bordesley Park and Wheels ‘Opportunity Area’: the area sits between the to-be-improved connections at Adderley Park station, and the new metro line. It will be very well connected to central Birmingham

This area is located between a much improved train frequencies at Adderley Park station and the new metro line - suggesting that it could become a super-connected zone which could form one of the new Opportunity Areas for EBNS.

The 16ha Wheels site forms part of the Bordesley Park AAP. Land at the Wheels site has now been designated as Core Employment Land and is a part of the city’s growth strategy to deliver industrial land and job opportunities. The plan sees promotion of new industrial and employment opportunities including the comprehensive and coordinated development of the Wheels site to deliver up to 1 million sq ft of floor space and up to 3,000 jobs and training opportunities. The introduction of metro will also be the opportunity for new development and mixed uses on the Bordesley Green frontage. Consideration will need to be given to ways in which the impact of the nearby transport infrastructure is maximised.

The Adderley Park area has roughly 7.5ha which the AAP sees currently as being mixed use. The right mix at the site is likely to flex with changing circumstances. Over time, and given the proximity of transport infrastructure, it is possible that this area could move towards predominantly housing use. If it did, it would add around 500 homes, and the Cherrywood Road housing already in the AAP will further reinforce this change.

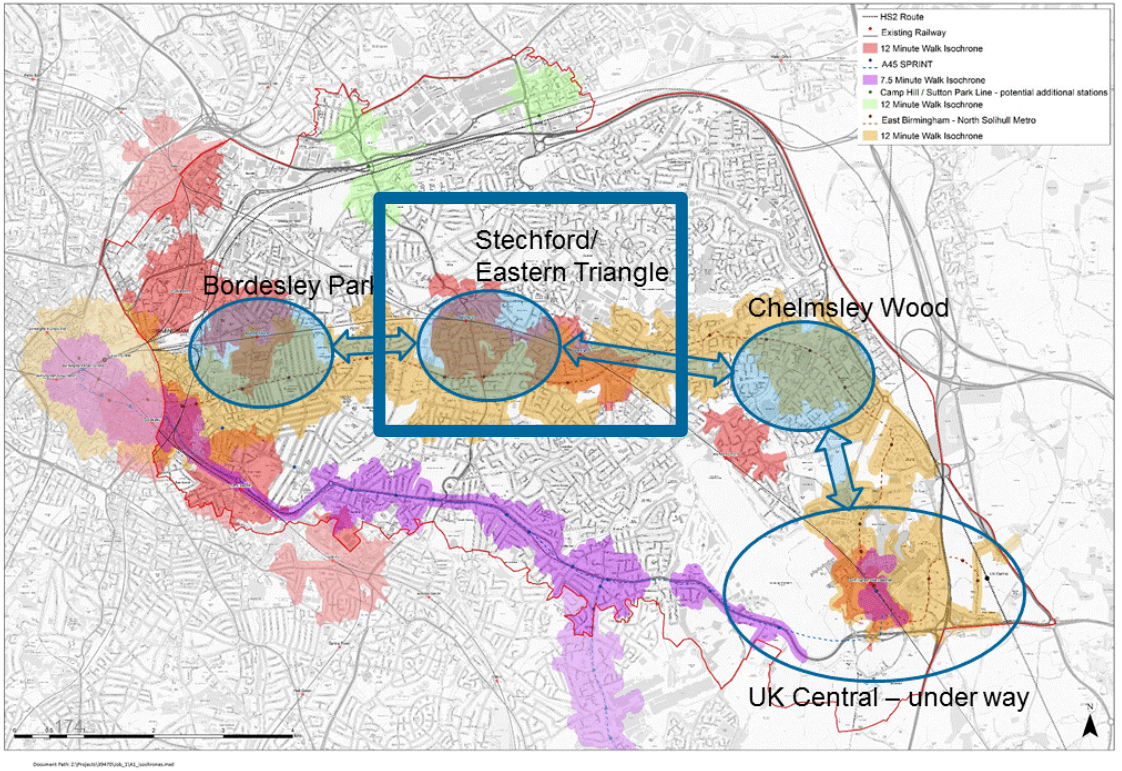


Stechford, Meadway and Shard End ‘Opportunity Area’ can develop out of the existing Birmingham Development Plan position

Stechford, Meadway and Shard End ‘Opportunity Area’: the Birmingham Development Plan already sees useful reconfiguration around Stechford, with 1000 new dwellings at Stechford, Meadway and Shard End. Evidence suggests that BCC stick to this plan – but perhaps elevate the visibility of this development using the Opportunity Area label.

Opportunities to reshape the market’s view of what is possible in the area should be intensively sought out. For example, there is a significant opportunity for a high quality development at the ex-sewage treatment plant site in the area.

It may be that over time, retail park viability erodes in favour of housing uses. This process is under way already in parts of the country. The balance is not likely to tip in this area for a number of years, but if it does, the retail land near Stechford station would provide highly sustainable links into Birmingham and out to the airport along the classic rail line, if redeveloped for housing.

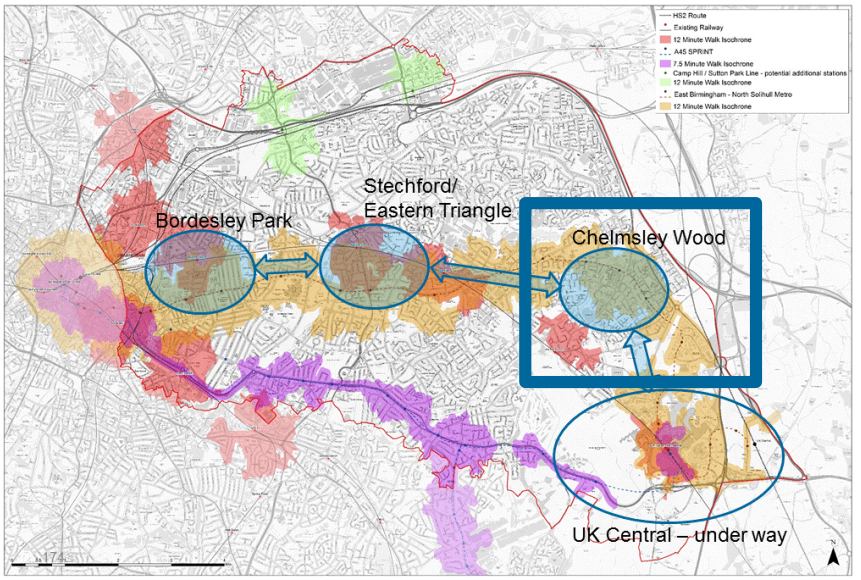


A radical approach at Chelmsley Wood could be possible

Evidence suggests there is scope for a radical approach to Chelmsley Wood Town centre. The 2005 North Solihull SPG suggests a refurbishment is necessary, but a dozen years on we suggest that a fully comprehensive approach would create the step change that is needed for the area.

- **There is potential to assemble a site large enough to create its own value zone**, if a comprehensive redevelopment was possible, boosting values by close co-location with the adjacent new Metro infrastructure which will run along Chelmsley Road and integrate with the existing bus station.
- **Stronger links to Meriden Park and Kingshurst Brook** (a tributary to the River Cole) could use good quality environments to further drive values and thus development viability.
- **The existing retail provision could be redeveloped.** The retail offer is tired and inward looking, with a number of vacancies. Retail in its current form is likely to continue to suffer from processes of retail polarisation and the “two way road” effect of metro services opening up better access to Birmingham town centre. (That being said, the retail site is currently a strong performer in the Ellandi portfolio).
- **There is possibility to rationalise the Chelmsley Road / Moorend Road roundabout to create a larger development footprint**, and reconfigure parking at the site.
- **There is potential to rationalise or relocate the Police Station and Royal Mail building**: police have recently closed singles accommodation and gym provision at the site, and are open to new ideas about service configurations in the area. Whilst Royal Mail operations could be relocated, we understand that there is telecoms masts and infrastructure within the building which would be costly to relocate.

We understand that Ellandi are interested in exploring redevelopment and refurbishment options and are in touch with the North Solihull Partnership.



Chelmsley Wood town centre retail

Route of the new metro at Chelmsley Wood town centre

With the loss of the Regional Development Agencies, is there ‘a gap in the market’ for a project delivery organisation?

Planning has become increasingly concerned with questions of 'how' development can be delivered, and 'when' - rather than just 'what' development is desired and ‘where'. With this shift comes a focus on the *means* of securing development rather than simply the ends, and an increasing focus on delivery issues. This shift could be encouraged, with a particular focus on delivery in East Birmingham.

This is not especially new: for example, the Killian Pretty review of 2008 sought to deliver a more “a positive and proactive approach to shaping, considering, determining and delivering development proposals.” However, the implications of this change should not be underestimated. Major projects are likely to need pro-active involvement from planning authorities could be actively viewed as projects in themselves – not as an application that will materialise at some point in future.

An EBNS Board has been set up to co-ordinate action on the area. However, this could need reinforcement. We are agnostic about delivery mechanisms, and further study would be needed to look into this issue, but note that Manchester City Council has been very successful in hooking together the political and executive impetus to get change in place. In London, and more recently in Teeside, Mayoral Development Corporations are being used to create a single minded delivery authority with a focused set of roles and responsibilities. Whether or not such a body (or others) were investigated in EBNS, we note that both Solihull and Birmingham are experienced in using Limited Liability Partnership delivery vehicles (at Iknield Port and Argent in central Birmingham, and with the North Solihull Partnership). These LLPs might have a role in the delivery of some Opportunity Areas – perhaps particularly at the Wheels site.

In Solihull, major investment at UK Central is being co-ordinated by the Urban Growth Company (UGC). Research was undertaken about how this process could be most effectively managed. Between May to October 2015 work was undertaken to determine the most appropriate delivery vehicle. These included:

- Option 1 Do nothing – continue operating within the current structure
- Option 2 Enhanced as is – improving the current governance arrangements
- Option 3 UKC Urban Growth Company – Arms length
- Option 4 Urban Growth Company – Independent
- Option 5 Urban Development Corporation

Out of the 6 options available, Option 3 enabled the Council to provide a dedicated focus through a highly skilled Board under the direction of an Independent chair for delivering major infrastructure. The UGC would seek to develop alliances with key partners that would ensure a co-ordinated and sequenced approach to the delivery of infrastructure. The UGC Proposition would also mean that the Council would retain its planning powers and the UGC would work closely with the Council to being forward and manage planning applications.

Can local authorities' planning departments fill the gap in project delivery?

No matter what decision about management structures is taken at EBNS (if any) the authorities involved in planning will need to

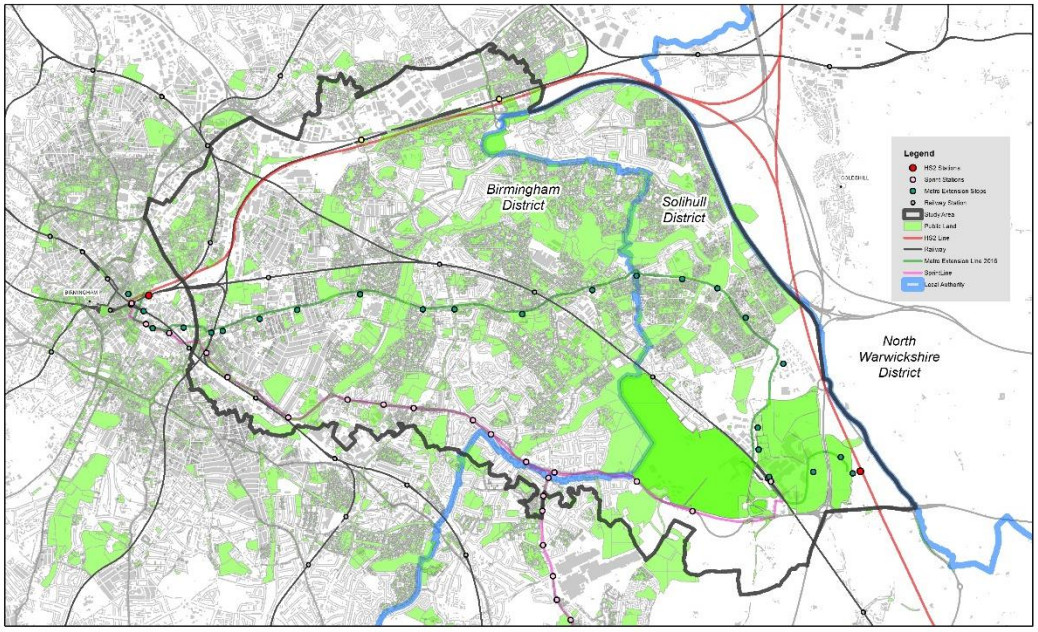
- play an active role in enabling development and planning infrastructure, or running applications more carefully to ensure that what is needed is provided when it is needed.
- get an understanding of what needs to happen; and seek to understand, and then bring about the right response. That could mean a highly proactive approach, working alongside public sector investors and developers to ask questions like: how do we fix the barriers to positive change? What do we do next? When? Who is responsible? What is the right planning role?
- Understand how to solve real-life issues on the critical path. The issues on the critical path are those which directly impact the planned project completion date. Management intervention and funding could be focused on these issues.

Should an active project management approach be adopted, this could include each "project" comprising the following.

- A project sponsor. This needs to be a senior officer who has the experience and line management authority to break through internal organisational silos.
- A clearly defined project manager. This individual would be held responsible for project progress and delivery.
- A clearly defined project team and project management structures.
- Excellent links between the project team and developers/investors. We are not suggesting that any development should be waved through. But the public interest is not necessarily inimical to the private interests of the developers. The local authorities need to operate as a joint delivery partner alongside the developer in assisting delivery.

An active public sector land strategy and CPO strategy could also be pursued, to ensure that the public sector captured more of the land value uplift created by investments in remediation, planning re-designation and connectivity investment. Public sector land can be identified, but very fine grained work is needed to convert this view into deliverable opportunities

Local authority owned land: Birmingham and Solihull ownerships, including details of property which is registered to Birmingham City Council within the Solihull boundary (leasehold and freehold titles)



Can some of the management burden be shared in an approach which builds 'collective intelligence' for EBNS? Can major employers take more of a role? Can we create a joint 'growth coalition' for EBNS?

The Kerslake Review (2014) found that governance structures in Birmingham needed improvement. It stated that "regeneration must take place beyond the physical transformation of the city centre. There is a particularly urgent challenge in central and east Birmingham." The review went on to advise that "the council should facilitate the creation of a new independent Birmingham leadership group. The group should approve the new long-term City Plan and be used to hold all involved in delivery of the plan to account." Kerslake points out that "other local authorities, such as Leeds have used their civic leadership role to develop a shared narrative and priorities for their city's future. They have used this to help agree shared strategic objectives across the city and to form the partnerships that are needed to deliver them".

Adapting this idea to EBNS, the EBNS area could build a new policy network which involves communities, local Government, local businesses, utilities, academia, and consultancies. NESTA points out that new ideas and new working cultures very rarely arrive as a result of an individual or organisation operating alone. Instead, they most frequently arrive following communicating with others with different experiences and professional qualifications. NESTA states that 'In an age of "combinatorial" innovation – where major breakthroughs are likely to involve knowledge from different fields, and joint working between thinkers, doers and communicators - being good at collective intelligence will be a crucial determinant of success for businesses, for governments, and for countries. Understanding more about how collective intelligence happens, and devising and implementing effective tools for fostering it should be a major project for the UK in the next decade'. This evidence suggests that success in EBNS might require the creation of a network that includes local Government, private businesses, utilities, academia, and consultancies in the creation of a "growth coalition" for the EBNS area.

Elsewhere, innovative methods of research have been adopted to stimulate this growth coalition. One example is the adoption of innovation X-prizes (which see a 'bounty' offered for solutions to a particular problem, such as the Wolfson Prize or the Wimbledon Innovation Prize). Skilfully delivered, such a process could also raise the profile of the EBNS area as an innovative, creative area.

We heard strong views from local councillors that it would be absolutely critical to ensure that the local people were involved in both strategy development and policy delivery in future.

This 'collective intelligence' approach suggests that the development of EBNS is not the sole responsibility of officers at the local authority. Instead, this 'collective intelligence' approach would see a more interactive process where officers would facilitate a series of conversations which are set up to find opportunities. A process of policy co-design, which builds in the ideas of a broad base of users from the very beginning of the planning process, and then involved in the evolving thinking as the plan is shaped. This can distinguished from the usual plan design process where a draft (but relatively finalised) plan is presented for public consultation. (This process of co-design can be seen as a somewhat less ambitious version of what is known as 'co-production', in which service users take responsibility for both design and delivery of policies. In practical terms, we cannot see users or communities being made responsible for the delivery).

Defining co-production (with co-design marked)

		Responsibility for design of services		
		Professionals as sole service planner	Professionals and service users/ community as co-planners	No professional input into service planning
Responsibility for delivery of services	Professionals as sole service deliverers	Traditional professional service provision	Professional service provision but users/communities involved in planning and design	Professionals as sole service deliverers
	Professionals and users/communities as co-deliverers	User co-delivery of professionally designed services	Full co-production	User/community delivery of services with little formal/ professional
	Users/communities as sole deliverers	User/community delivery of professionally planned services	User/community delivery of co-planned or co-designed services	Self-organised community provision

Source: NESTA (2013)

Evaluating change

Key issues

- There is scope for an innovative evaluation approach
- There is a major opportunity to pilot new datasets which track delivery and change

EBNS could adopt an innovative evaluation framework, using new data sources to track outcomes for both places and (anonymised) individuals

We have been asked to identify how we might use baseline data collated to evaluate the success of that vision and strategy over time. More broadly, we have been asked to comment on how councils and local agencies can use high quality monitoring information to constantly improve planning and strategy delivery.

For this process of evaluation and delivery monitoring to be a success, we will need to work around two principles. We should:

- 1.Set out up-front the specific impacts that the development is seeking to deliver
- 2.Identify the impacts of development on place, and the impacts of development on people.

We deal with each in turn.

1. Setting out up-front the specific impacts that the development is seeking to deliver

BCC and North Solihull have an opportunity to set out a robust and rigorous approach to evaluation, by starting from the 'development impacts' they are seeking to deliver. This avoids the crude 'data mining' approach taken by many programme and project evaluations, where a long-list of indicators is assessed after the event, and those indicators showing positive change are cherry-picked as evidence of success.

It is not our role in this baselining study to specify the 'development impacts': those should tie back to the main elements of the agreed vision which will be developed at stages subsequent to this baseline stage. However, given the likely main thrusts of the future strategy and vision, we suggest that the development impacts should perhaps cover the following areas:

- 1. Employment, and specifically youth employment
- 2. Jobs and employment mix, including occupational status
- 3. Incomes
- 4. Skill levels, including school attainment
- 5. Business mix
- 6. Site viability, as measured through proxy data on house prices.

We might be tempted to include an overall measure of the local area such as the Index of Multiple Deprivation (IMD), the governments' standard measure of deprivation at local area level. We might expect that successful development and associated projects should lead to improved ranking on the IMD. However, this should be avoided; we do not know whether the IMD will be updated at appropriate times for the evaluation; and if it is updated, we do not know that it will be produced in a consistent manner, and we do not know that changes in the local area would be captured by changes in the IMD ranking.

2. Identifying the impacts of development on place, and the impacts of development on people

The data in this baseline study is based on area averages, such as the average unemployment rates across the study area and neighbourhoods. Analysis of these area averages over time can help show the impacts on place, but to understand the impacts on individual people requires analysing individual data. For example, a successful local employment initiative may result in significant numbers entering the workplace. But the average (un)employment rate may remain static (and not show any positive change) if these people are then able to afford to move to a more desirable area and are replaced by a new group of workless people. Similarly, changes in area averages may be due to other factors, beyond the control of any local development.

The lack of available and appropriate individual-level data is a major barrier here. However, there is significant interest in making better use of data held by central government. Alongside better accessibility and use of data on individual services and outcomes, there is growing recognition of data science for more efficient and more effective services.

We see a major opportunity here for BCC and NS to work with national agencies to pilot a robust approach to evaluation of major development projects such as the EBNS

Much of this work goes beyond the neighbourhood data available from open data, and enables analysis of individual outcomes that can be aggregated up to provide a view for service commissioners and providers. This data is richer than simple statistics published at neighbourhood level, and allows:

- Comparison of changes over time between the study place and a control group of similar areas;
- Comparison of changes over time between people in the study area, and a control group of similar people. For example, changes over time for 'in-movers' and 'out-movers' to and from the study area can be compared against 'remainers';
- Disentangling 'place' and 'people' outcomes. One example is the Ministry of Justice DataLab, which provides organisations working to reduce re-offending with aggregate statistics on the percentage of their clients who return to jail, benchmarked against a control group. The delivery organisation and MoJ benefit from better information on the effectiveness of re-offending reduction interventions, while no individual or sensitive data is released or shared. DWP and other agencies are exploring similar approaches, while ONS makes much of its underlying microdata (although not Census) available to researchers and public sector through the Virtual Microdata Lab.

We see a major opportunity here for BCC and NS to work with national agencies to pilot a robust approach to evaluation of major development projects such as the EBNS. The precise details of the evaluation will need to be penned-in during future stages of the EBNS project alongside the vison and strategy. However, at this stage we can sketch the broad canvas.

- *1.Impacts of development on place* should be assessed based on the area-based data published by national agencies, or held by local agencies. For each of the six issues highlighted above, the first column in the table below sets out the primary area-level datasets for the EBNS area that we suggest should form the basis of any such place-based evaluation. This list will need reviewing over the course of the development, as the availability of data is likely to change (for example the implementation of Universal Credit, and any subsequent changes to the benefit system, may impact the availability and comparability of data).
- *2.Impacts of development on individual people* should be assessed through accessing data held by national and local agencies, in a similar way to the MoJ Justice DataLab example above. The third column in the table below highlights individual-level data that are currently held by government agencies; many can be analysed by public sector bodies under strictly controlled access. The table below outlines current access to data held by government agencies.

Issue	Current source of area-level data for EBNS	Potential source of individual-level data
Employment, and specifically youth employment	Jobseeker's Allowance and Universal Credit data. Employment data (Census).	HMRC data, based on PAYE and self-assessment returns. DWP data underpinning unemployment benefit, universal credit etc
Jobs and employment mix, including occupational status	Employment and jobs by industry (Census, BRES) and occupation (Census).	HMRC data, based on PAYE and self-assessment returns
Incomes	Experimental income estimates based on PAYE data. Children living in poverty (HMRC). Modelled estimates.	HMRC data, based on PAYE and self-assessment returns
Skill levels, including school attainment	Key Stage data by school, and by pupil residence (DfE). Access/ entry to FE and HE. Qualifications (Census).	DfE, based on school census. Local authority data on FE attendance. UCAS / HESA data on HE entry, local data on FE entry
Business mix	VAT-registered businesses (ONS). Industry sectors (ONS).	Companies House and HMRC, based on formation data, VAT returns, self-assessment returns
Site viability	House prices, land availability	Land Registry, individual property transactions

Piloting a new approach to evaluation (cond.)

Accessing data held by government agencies

The following datasets could be used by future evaluators.

• Office for National Statistics (ONS). The ONS Virtual Microdata Laboratory (VML) provides access for approved researchers to the microdata underpinning published statistics. Access is granted under secure and controlled conditions only, to projects for social good, and no sensitive data may be removed. BCC and BS researchers, or their contractors, may access this data.

• DfE. Individual record data from the DfE National Pupil Database and School Census is available under strictly controlled circumstances, and for approved projects.

• HESA. Individual record data from HESA on university applications is available under strictly controlled circumstances, and for approved projects.

• DWP. There is significant interest in a DWP DataLab. Although there is no publicly available DataLab access to DWP datasets, however our understanding is that this is in development.

• HMRC. The HMRC DataLab allows approved researchers to access anonymised HMRC data in a government accredited secure environment. See https://www.gov.uk/government/organisations/hm-revenue-customs/about/research for details.

As well as looking at 'hard' data outcomes, any future evaluation could look at management and leadership. The Kerslake Review worked to the principles of the Local Government Association's (LGA) peer challenge model. These principles could provide a useful framework for the evaluation of any future governance and leadership in East Birmingham itself, as well as the wider city. The dimensions are

a. effective political and managerial leadership, working as a constructive partnership;
b. a good understanding of the local context which informs a shared long-term vision and a clear set of priorities understood by the workforce and other partners;
c. effective governance and decision-making arrangements that respond to challenges and manage performance, change, transformation and disinvestment;
d. capacity and resources focused in the right areas in order to deliver the agreed priorities, supported by relevant organisational and workforce development; and,
e. a financial plan in place to ensure its long term viability and evidence it is being implemented successfully.

Appendix 1 – Viability testing method

Appendix 1: About the method used in high level viability testing, and the caveats attached

The methodology used

For each case study, we have estimated the breakdown of land usage by type and area, and have assessed existing use values from recent market data including Land Registry Price Paid Date. Areas within the case studies for intensification will require acquisition where currently in private ownership.

Then a proposed scheme of intensified land use and higher value market housing has been assessed using uplifts in values reflecting values obtained for new housing, offices and retail in the more economically vibrant parts of the region but not using the highest value areas such as Birmingham city centre commercial or Solihull prime residential. The costs of transition are assessed including acquisition, compensation and demolition costs, and associated infrastructure obligations that will arise for the net additions in market housing.

New residual land values have been calculated, and allowing for administration and financing costs, if the new land use receipts exceed all the transition costs then the scheme is considered viable.

We have not cut the number of affordable homes in each scenario. The number of affordable homes has stayed the same as today. The percentage of affordable housing falls in the scenarios, but because the numbers of homes produced has risen, this allows us to keep the absolute number of the same (though product type may shift).

Significant sensitivities and caveats

The viability of regeneration with intensified land use is most sensitive to:

- The change in market values that can be achieved especially for market housing
- The degree of increase in density of land use, again particularly in respect of market housing
- And to a lesser extent the balance of tenures (or the proportion of land ownership in the public sector) before and after development. A high private market ownership at the beginning leads to high acquisition and compensation costs, whereas a high market provision in the proposed scheme leads to higher receipts and improved viability.

Other sensitivities exist within the underlying calculations, such as the cost of financing, but the above three factors have by far the most significant effect on viability. This is further reinforced given evidence presented in this study on lessons learnt from the North Solihull Partnership's work.

Many rough estimates have been made in this high-level assessment. A more detailed study may show gains, for example acquisition costs of a commercial lease will be much less if the lease term is about to end.

Finally, there is evidence that regeneration of this nature will enhance the values of neighbouring stock, and dwellings and buildings that are within the study area but physically untouched. This "unearned" value uplift can be considerable and warrants a study of mechanisms to recycle these gains into the scheme (see Transport for London study on Land Value Capture, Feb 2017). No assumptions about these indirect gains have been incorporated into this high-level viability assessment.

Appendix 1: Viability case study summaries

Case Study A

Land use	Existing Estimate	hectares	Proposed	Density: Existing Dwellings	Dpha	Proposed Dwellings	Dpha
Domestic buildings	0.4						
Domestic gardens	0.4						
Housing sub-total		0.8	3.0	47	61	250	83
				Floor space (sm)			
				Existing	Plot ratio	Proposed	Plot ratio
Retail	-		-	-	-	-	-
Offices	0.5		8.0	5,600	1.1	100,000	1.3
Light industrial	8.9		12.0	89,000	1.0	125,000	1.0
Parking	5.1		6.0				
Commercial sub-total		14.6	26.0	94,600		225,000	
Roads and paths	4.7						
Parking where not included above	0.4						
Highways sub-total		5.1	6.0				
Education	2.3	2.3	3.9				
Leisure	17.4		2.0				
Greenspace	3.6						
Allotments	-						
Water	-						
Amenity total		21.0	4.8				
Other	4.0	4.0	2.0				
Total	47.7	47.7	47.7				

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Case Study B

Land use	Existing Estimate	hectares	Proposed	Density: Existing Dwellings	Dpha	Proposed Dwellings	Dpha
Domestic buildings	4.4						
Domestic gardens	14.9						
Housing sub-total		19.3	16.5	670	35	1,000	61
				Floor space (sm)			
				Existing	Plot ratio	Proposed	Plot ratio
Retail	0.3		0.6	3,000	1.0	6,000	1.0
Offices	0.2		0.5	4,000	2.0	10,000	2.0
Light industrial	0.8		1.6	3,100	0.4	6,000	0.4
Parking	0.5		1.3				
Commercial sub-total		1.8	4.0	10,100		22,000	
Roads and paths	6.2						
Parking where not included above	0.1						
Highways sub-total		6.3	7.0				
Education	0.2	0.2	0.2				
Leisure	0.8						
Greenspace	7.3						
Allotments	0.6						
Water	-						
Amenity total		8.7	8.5				
Other	0.8	0.8	0.8				
Total	37.0	37.0	37.0				

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Case Study C

Land use	Existing Estimate	hectares	Proposed	Density: Existing Dwellings	Dpha	Proposed Dwellings	Dpha
Domestic buildings	10.1						
Domestic gardens	37.3						
Housing sub-total		47.4	49.1	2,143	45	3,000	61
				Floor space (sm)			
				Existing	Plot ratio	Proposed	Plot ratio
Retail	3.1		3.8	30,800	1.0	40,000	1.1
Offices	1.2		2.0	60,800	5.2	90,000	4.5
Light industrial	-		-	-	-	-	-
Parking	2.6		1.2				
Commercial sub-total		6.9	7.0	91,600		130,000	
Roads and paths	14.2						
Parking where not included above	0.3						
Highways sub-total		14.4	13.0				
Education	8.5	8.5	8.5				
Leisure	0.3						
Greenspace	17.8						
Allotments	-						
Water	0.2						
Amenity total		18.2	17.8				
Other	4.0	4.0	4.0				
Total	99.4	99.4	99.4				

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Appendix 2: selected sources

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Appendix 3 - Effects of transport investment on workers' access to jobs

The future network assessment shows how, overall, improvements in journey times affect people with different skills. There will be 2,687 (8%) more people with no qualifications within 20 minutes of one or more of the key job locations

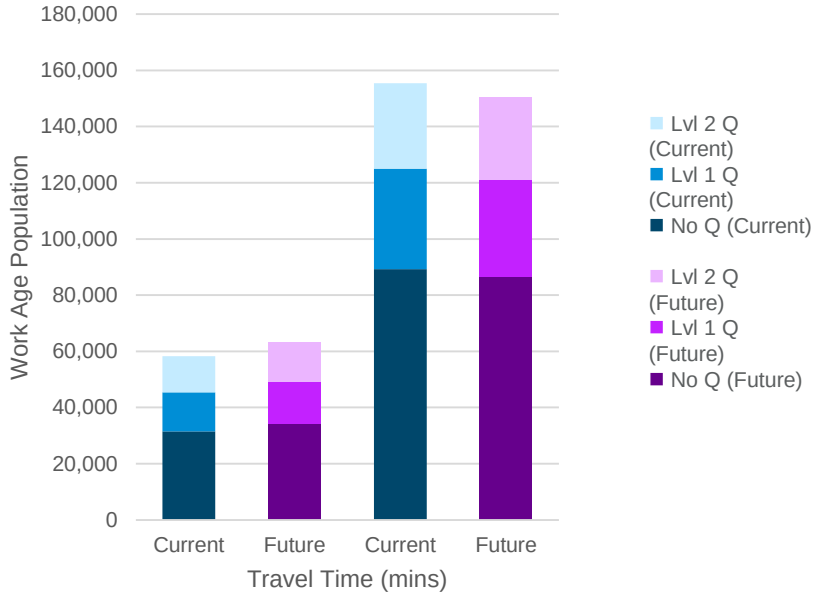
Skill Levels (EBNS study area residents)

	Minutes	No Qualifications	Level 1 Qualifications	Level 2 Qualifications
Current	0-20	31,480	13,858	12,915
	20-40	89,197	35,857	30,371
Future	0-20	34,167	15,052	14,041
	20-40	86,509	34,663	29,245
Change	0-20	109%	109%	109%
	20-40	97%	97%	96%

The breakdown of benefits across people with limited qualifications is shown below, demonstrating that the greatest travel time improvements, around 8%, will be experienced by those with no qualifications travelling between up to 20 minutes.

Note that there a reduction in the overall number of people travelling 20-40 minutes. This is because these statistics look at the number of people within the EBNS study area only. In reality travel time distances (and the people within it) will extend beyond the study area boundary.

Change in public transport travel time for people with qualification level 2 or below (within EBNS study area)



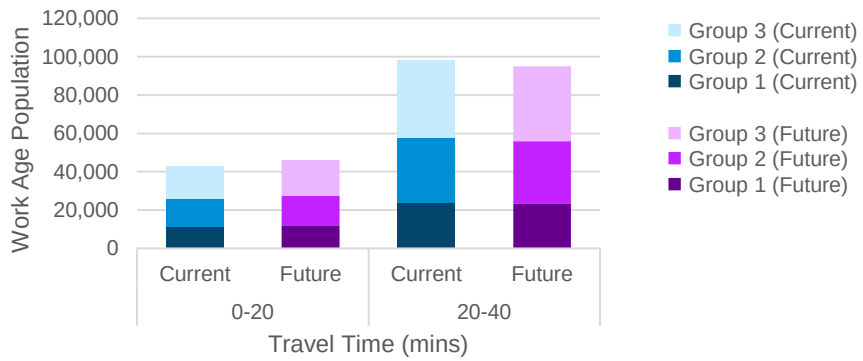
The evidence shows that, overall, improvements in journey times will have a positive impacts on people of all occupations. 1,500 more people in manual roles are within 20 minutes of a job node

There are improvements for people across the occupation groups for journey times up to 20 minutes, but journey time improvements most affect those people in manual roles over this duration with a 1,500 (8%) increase expected.

Occupation Groups (EBNS study area residents)

		Professional			Service and Support			Manual Roles		
	Minutes	Managers, Directors and Senior Officials	Professional Occupations	Associate Professional and Technical Occupations	Administrative and Secretarial Occupations	Caring, Leisure and Other Service Occupations	Sales and Customer Service Occupations	Skilled Trades Occupations	Process, Plant and Machine Operatives	Elementary Occupations
	0-20	2,925	4,667	3,782	5,422	4,670	4,326	5,197	5,196	6,658
Current	20-40	6,706	9,799	7,361	11,333	10,482	12,024	10,751	11,805	18,045
	0-20	3,087	4,913	4,028	5,825	5,106	4,640	5,635	5,622	7,298
Future	20-40	6,545	9,554	7,115	10,930	10,046	11,710	10,313	11,379	17,406
	0-20	106%	105%	107%	107%	109%	107%	108%	108%	110%
Change	20-40	98%	97%	97%	96%	96%	97%	96%	96%	96%

Change in public transport travel time to NEC, Airport and UK Central by employment group (EBNS study area residents)



The improvements affect all occupations without significant differences in benefits to any particular group, however, the largest single affected category being those in manual professions (e.g. skilled trades, plant operatives and elementary professions). For this group, around 1,500 people currently employed and located within 20 minutes journey time would benefit; an 8% increase over the current situation.

Note that there again a reduction in the overall number of people travelling 20-40 minutes. This is because these statistics look at the number of people within the EBNS study area only. In reality travel time distances (and the people within it) will extend beyond the study area boundary.

Around 6,700 (45%) of JSA and ESA claimants will benefit from improved levels of accessibility to public transport as a result of proposed transport infrastructure improvements

JSA/ESA Claimants (EBNS study area residents)

	PTAL	JSA claimants	ESA claimants
Current	Very Poor	4,312	10,100
	Poor	4,050	9,903
	Moderate	2,190	5,462
	Good	106	199
	Very Good	1	2
Future	Very Poor	3,829	8,840
	Poor	2,628	6,379
	Moderate	3,245	8,017
	Good	907	2,300
	Very Good	51	129
Change	Very Poor	89%	88%
	Poor	65%	64%
	Moderate	148%	147%
	Good	855%	1158%
	Very Good	5651%	7198%

At present a high proportion of people claiming JSA and ESA live in areas with a poor or very poor level of PTAL accessibility.

The introduction of the Metro and SPRINT services will bring public transport connections into such areas, making considerable improvements for those worst affected.

The improvements to the public transport infrastructure not only brings better connections, but also enhanced opportunities to people who live in areas which are poorly connected at present.

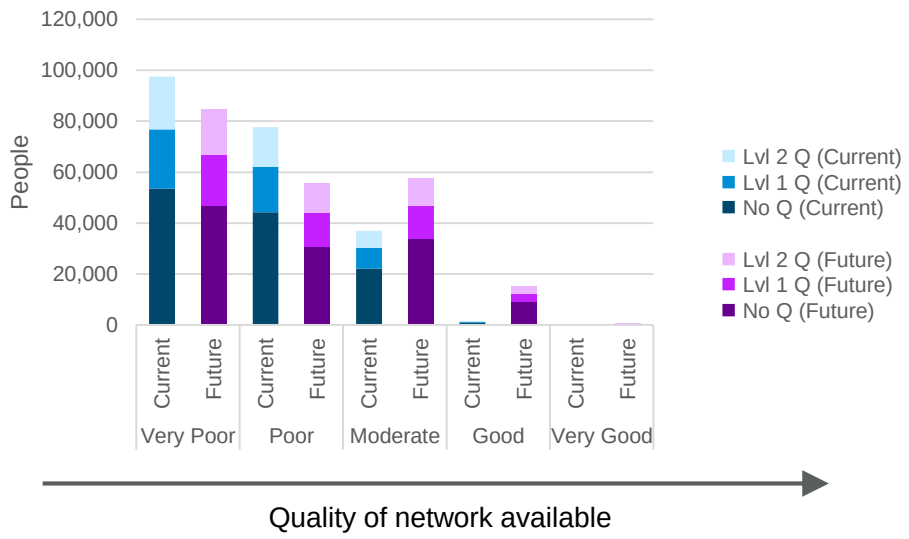
The evidence shows how, overall, improvements to PTAL following transport investment affect people with different skills

There are improvements for people across the skills levels, but improved PTAL (moderate and above) primarily affects those people with no qualifications, with around 20,000 people in EBNS (50%) of this group positively impacted. Although lower increases in person numbers will be experienced for those with Level 1 and 2 qualifications, the improved access to pubic transport still represents a 50% increase over the current situation.

Number of residents of EBNS affected by PTAL change - by skill levels

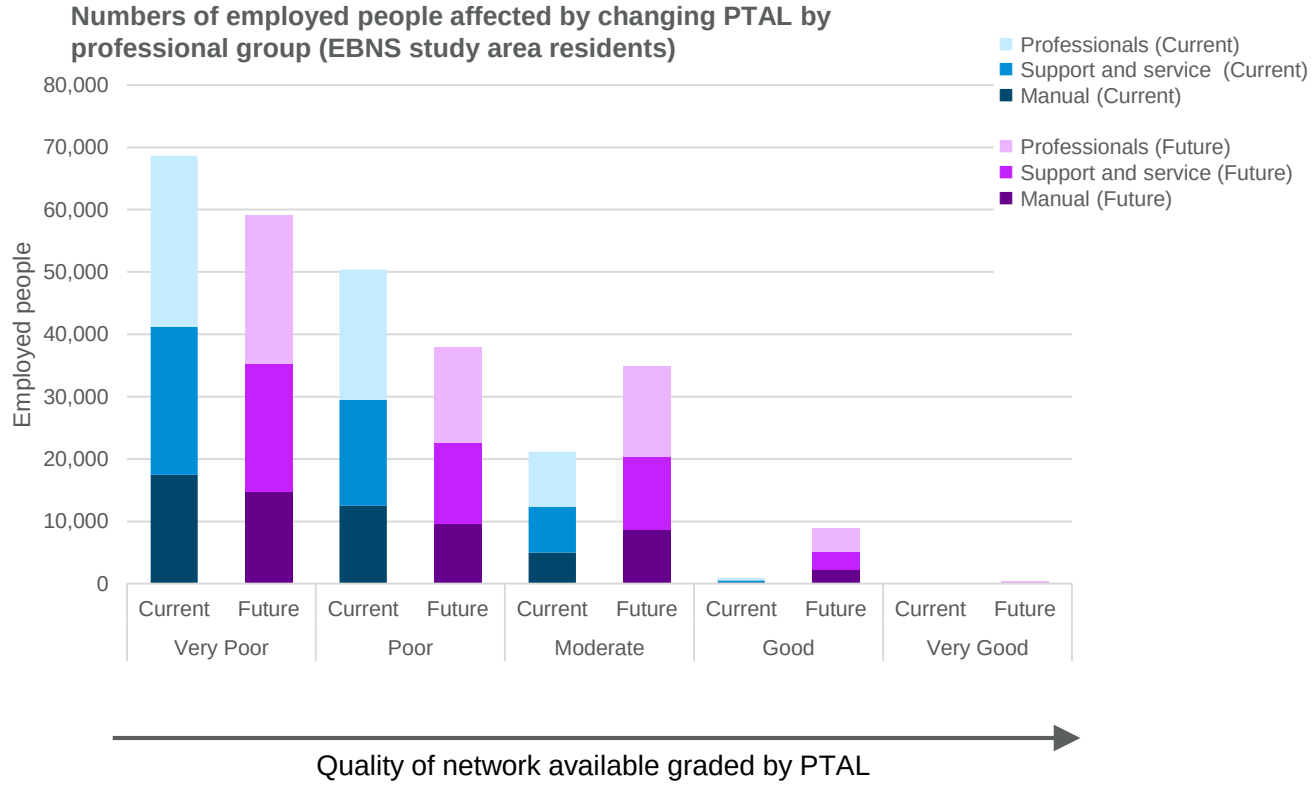
	PTAL	No Qualifications	Level 1 Qualifications	Level 2 Qualifications
	Very Poor	22,781	9,924	8,729
	Very Poor	30,694	13,418	11,982
	Poor	44,183	17,888	15,611
	Moderate	22,135	8,127	6,670
	Good	878	358	294
Current	Very Good	9	2	3
	Very Poor	22476	9652	8501
	Very Poor	24080	10449	9420
	Poor	30,893	13,032	11,550
	Moderate	33,851	12,950	10,795
	Good	8,930	3,472	2,892
Future	Very Good	451	163	131
	Very Poor	0.99	0.97	0.97
	Very Poor	78%	78%	79%
	Poor	70%	73%	74%
	Moderate	153%	159%	162%
	Good	1017%	971%	983%
Change	Very Good	5014%	6825%	4972%

Change in public transport travel time for people with qualification level 2 or below (EBNS study area residents)



The evidence also shows how, overall, improvements to PTAL affect people with different occupations. There are improvements for people across the occupations groups, but improved PTAL (moderate and above) primarily affects those people in manual roles

Improved PTAL affects those people in manual roles to the greatest extent, with around 9,200 (50%) positively impacted. Although lower increases in person numbers will be experienced for those in professional and support/service industry occupations, the improved access to public transport still represents a 50% increase over the current situation.

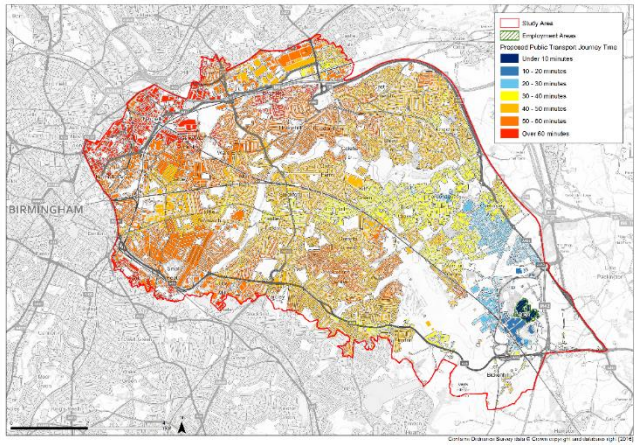


Appendix 4 - Effects of transport investment on the labour market catchment for specific investment sites

Labour market impacts for employers at NEC, Airport and UK Central: After the investment package, 25% more people of working age could access NEC, Airport and UK Central within 40 minutes and 18% within 20 minutes. Around 40% of the EBNS working population will be within 40 minutes of NEC, Airport and UK Central, compared to the current 30%

To keep the analysis clear, we have packaged together our analysis of the labour market impacts at NEC, the Airport, and UK Central. The geographical proximity of these sites, and the fact that they are on the same planned networks, makes this possible – although there are likely to be differences at the margin for some routings.

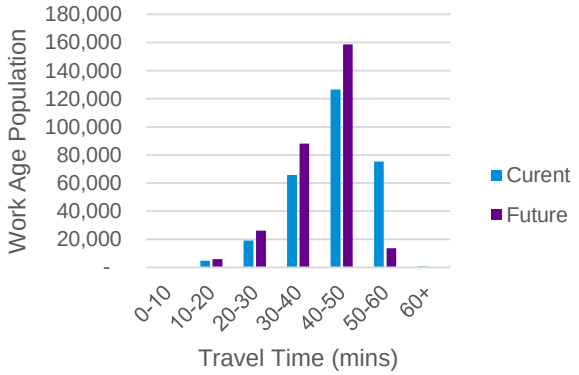
New public transport travel time to NEC, Airport and UK Central following the planned infrastructure improvements



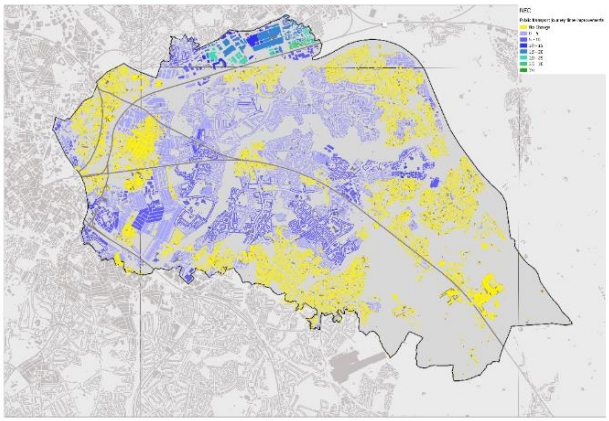
This map shows travel time by all modes of public transport (assuming up to 6 minutes walk to access it) from NEC, Airport and UK Central following the planned package of new transport infrastructure (Metro, SPRINT) and rail infrastructure improvements (where improved service frequencies feed through into improved average journey times).

The shortest journey times to NEC, Airport and UK Central are shown in blue, suggesting that, generally speaking, those areas most geographically proximate to NEC, Airport and UK Central have the best access times

Work Age Population			
	Current	Future	Change
0-20 mins	5,014	6,148	123%
20-40 mins	85,022	114,161	134%
40+ mins	202,639	172,366	85%



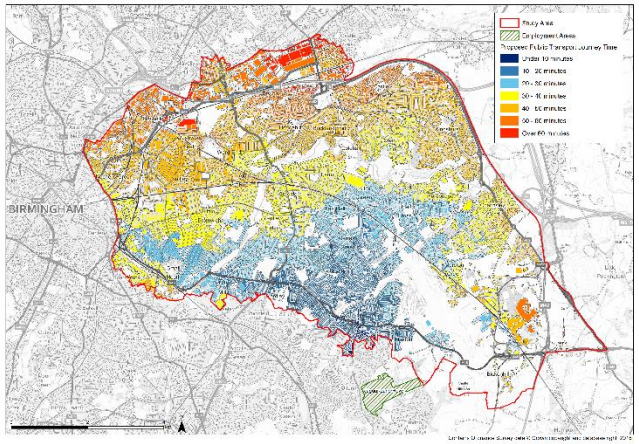
Change in Public transport travel time to NEC, Airport and UK Central following planned infrastructure improvements



The *change* in travel time is shown in the map above. Those areas that experience the greatest improvements are shown in dark greens and blues on the map and include those areas that are more distant from NEC, Airport and UK Central, including Tyburn, South Nechells and Bordesley Green and areas within Sheldon, Shard End and Stechford and Yardley North that are located within proximity of the railway.

Labour market impacts for Jaguar Land Rover Lode Lane site: after the investment package, 5% more people of working age could access Jaguar Land Rover Lode Lane within 20 minutes, an improvement of 6,400 people. Around 140,000 (48% of the EBNS area) working population will be within 20 minutes of Jaguar Land Rover Lode Lane, compared to the current 134,000

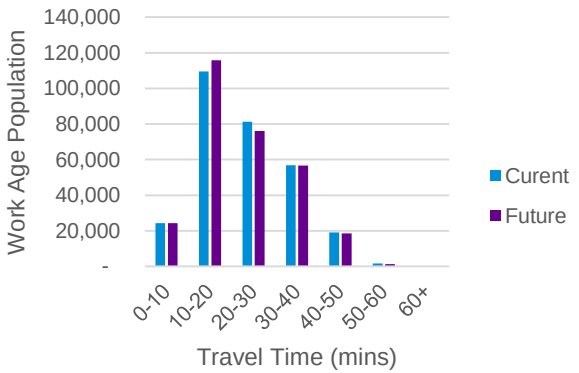
New public transport travel time to Jaguar Land Rover Lode Lane following the planned infrastructure improvements



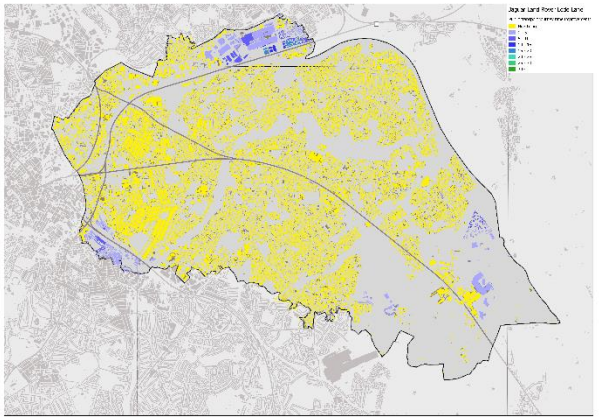
This map shows travel time by all modes of public transport (assuming up to 6 minutes walk to access it) from Jaguar Land Rover Lode Lane following the planned package of new transport infrastructure (Metro, SPRINT) and rail infrastructure improvements (where improved service frequencies feed through into improved average journey times).

The shortest journey times to Jaguar Land Rover Lode Lane are shown in blue, suggesting that, generally speaking, those areas most geographically proximate to Jaguar Land Rover Lode Lane have the best access times

Work Age Population			
Minutes	Current	Future	Change
0-20 mins	133,760	140,172	105%
20-40 mins	138,154	132,732	96%
40+ mins	20,761	19,770	95%



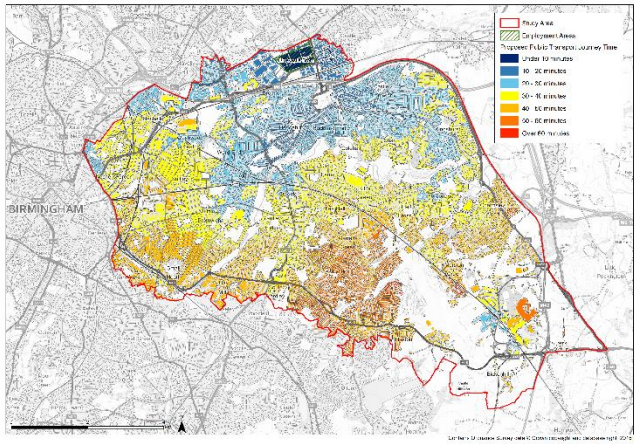
Change in Public transport travel time Jaguar Land Rover Lode Lane following planned infrastructure improvements



The *change* in travel time is shown in the map above. Those areas that experience the greatest improvements are shown in dark greens and blues on the map and include those areas that are more distant from Jaguar Land Rover Lode Lane , including Tyburn, South Nechells and north Sparkbrook.

Labour market impacts for Jaguar Land Rover Castle Vale:
After the investment package, 3% more people of working age could access Jaguar Land Rover Castle Vale within 40 minutes, an improvement of 5,700 people. Around 217,000 (94% of the EBNS area) working population will be within 40 minutes of Jaguar Land Rover Castle Vale, compared to the current 212,000

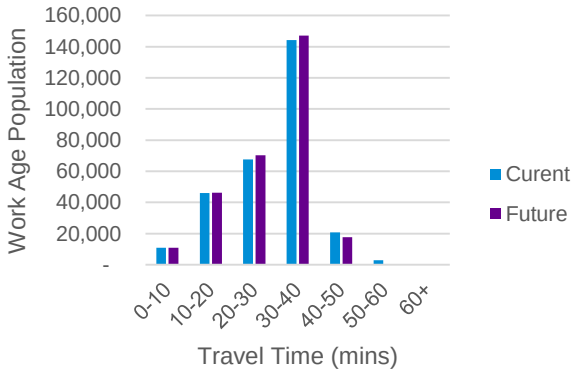
New public transport travel time to Jaguar Land Rover Castle Vale following the planned infrastructure improvements



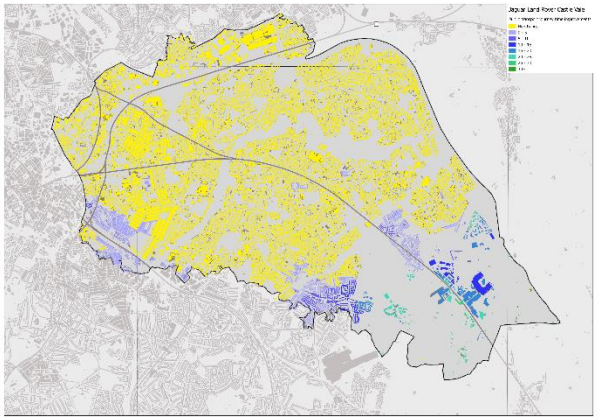
This map shows travel time by all modes of public transport (assuming up to 6 minutes walk to access it) from Jaguar Land Rover Castle Vale following the planned package of new transport infrastructure (Metro, SPRINT) and rail infrastructure improvements (where improved service frequencies feed through into improved average journey times).

The shortest journey times to Jaguar Land Rover Castle Vale are shown in blue, suggesting that, generally speaking, those areas most geographically proximate Jaguar Land Rover Castle Vale have the best access times

Work Age Population			
Minutes	Current	Future	Change
0-20 mins	57,027	57,181	100%
20-40 mins	211,798	217,482	103%
40+ mins	23,850	18,012	76%



Change in Public transport travel time to Jaguar Land Rover Castle Vale following planned infrastructure improvements



The *change* in travel time is shown in the map above. Those areas that experience the greatest improvements are shown in dark greens and blues on the map and include those areas that are more distant from Jaguar Land Rover Castle Vale, including South Nechells and north Sparkbrook, and areas within Sheldon, Lyndon and Elmdon and Bickenhill.

Labour market improvements for Birmingham city centre and Washwood Heath resulting from connectivity investment are more marginal, but can still be expected to create significant advantages

The above slides have set out the impacts of new transport infrastructure on labour market catchments for specific investment sites. We have looked at the size of working populations within a given commuting time of a key employment sites, and have then looked at the impacts of changes on different groups by skills, occupation and benefit claimant status (detailed information is in the appendix).

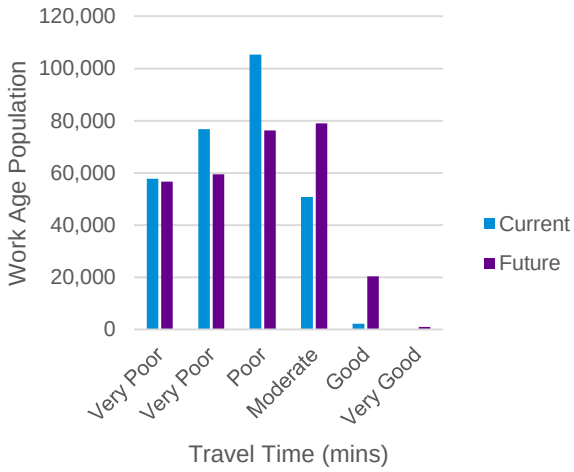
We have not presented the same data pack for Birmingham city centre and Washwood Heath. This is because the effects of change created by new transport infrastructure on the city centre appear very much more marginal on these measures – which, in turn, is due to the fact that radial routes into the city centre already exist, and the new infrastructure makes a less significant difference to journey times.

However, the new transport infrastructure can still be expected to create significant advantages. For residents of EBNS, new transport infrastructure will create more transport options into Birmingham city centre, higher frequencies, more connectivity, and better interchange opportunities. The benefits of this new network are shown in the PTAL measures which better highlight the effects of higher frequency services, rather than simple travel times. We have demonstrated the effects of new transport on PTAL elsewhere in this evidence base.

Employers in the city centre will also benefit. The ability to bring more workers into Birmingham city centre can be expected to create agglomeration impacts, which accrue from firms being able to locate near each other and so experience economies of scale, knowledge spillovers and network effects.

Birmingham Mobility Action Plan (BMAP) states that improvements in transport infrastructure are intended to create benefits resulting from improvements in CO_2 , NOx, and particulate emissions, but we have not analysed those benefits in detail here.

Change in PTAL for working age population



Work Age Population			
	Current	Future	Change
Very Poor	57,712	56,707	98%
Very Poor	76,711	59,461	78%
Poor	105,279	76,274	72%
Moderate	50,806	78,995	155%
Good	2,163	20,320	939%
Very Good	18	933	5179%

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