



# EMCC case studies

## Commerce cluster in Birmingham, UK

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## Introduction

Birmingham is the regional capital of the West Midlands, which has a population of 5.3 million, a workforce of nearly 2.5 million and a client base of 182,000 companies. The city of Birmingham has a population of just over 1 million people. As a region, the gross value added (GVA) for the West Midlands is over £61.5 billion, while the GVA for Birmingham is £11.8 billion.

Birmingham's reputation as the powerhouse of the United Kingdom's manufacturing sector was shaped in the Industrial Revolution of the 18th century. Traditional industries such as automotive and engineering remain a crucial part of the region's success, but today, through a period of diversification, Birmingham has become a focal point for the development of knowledge-based industries, telecommunications and information technology.

The city, with its strategic position at the centre of the UK motorway and rail networks, benefits from good transport facilities. The city centre is a nationwide hub for national express coaches and also has an extensive local bus service that operates 24-hour services throughout the city. Birmingham has three mainline train stations and the Midlands metro light rail transport system that runs between. Birmingham International Airport is the fifth largest airport in the UK, handling more than 9 million passengers each year. More than 50 airlines operate to over 100 destinations, including 20 capital cities.

The canal network, once so important in driving the Industrial Revolution, is again at the forefront of Birmingham's rejuvenation. This is seen at Brindleyplace, a 17-acre mixed use redevelopment started in 1994 and now almost completed at a total cost of £400 million. Here, the canal is now fronted with new offices, city living apartments as well as leisure and entertainment venues. On the opposite bank, the International Convention Centre and National Indoor Arena are spearheading the drive to be the UK's top conference city, further supplemented by the National Exhibition Centre placed near the airport.

Birmingham is still building for the future. It is estimated that there is in excess of £11.4 billion worth of investment planned for the next 10 years, with over £9.2 billion worth of investment planned or underway in the city centre alone. Europe's largest city centre retail regeneration scheme, at a cost of £800 million, the Bullring, opened on 4 September 2003. The next major project is underway with the £6 billion 180-hectare development of the Eastside, the extended boundary for the city centre, with a new library and learning centre.

Birmingham now has a retail presence capable of fulfilling the potential of its catchment area of 4.5 million people living within 30 miles of the city centre. It attracts a total annual expenditure of £2,207 million, £8 million ahead of Glasgow and 50% more than in Manchester or Leeds. The expenditure is just less than half of the expenditure in London and makes it the most popular shopping destination outside the capital in the UK.

With its strong research base, Birmingham offers a number of world-class facilities. Aston Science Park is a high-spec destination for both new and established knowledge-based businesses. The University of Birmingham Research Park offers purpose-built accommodation to companies and projects seeking to work with the university in research, development or training.

Although significant developments in Birmingham city centre have led to improvements in the local economy, there are still significant challenges ahead. Evidence emerged from a report by the Centre for Cities for the Institute of Public Policy Research that saw Telford and Birmingham falling behind other towns and cities in economic growth and performance.

The report says that there have been two tracks of city development in England over the past decade, with the Birmingham 'city region' – which the report defines as Birmingham plus Telford, Wolverhampton, Walsall, Dudley and Sandwell – placed in the bottom five performers.

The report shows that most of England's major cities have been growing over the last 10 years, but some at a much faster rate than others. Top performers in employment and population growth and levels of skills are Reading, Bristol, Southampton, Cambridge and York. At the bottom of the pile, the Birmingham region is lumped with Liverpool, Newcastle, Sunderland and Middlesbrough.

Unemployment in Birmingham and the Black Country was the highest among the areas surveyed, and at 7.4% in 2005, it was twice as high as in Reading and Southampton and three times higher than York. It is fair to say, though, that the unemployment in the Black Country area covering Wolverhampton, Walsall, Dudley and Sandwell is somewhat higher than in the city of Birmingham.

For 20 years or more, the retail industry in Birmingham has been underdeveloped. Several out-of-town developments like Merry Hill and Touchwood in Solihull as well as shopping opportunities in towns around Birmingham were the main retail attractions. The city centre redevelopments and regeneration schemes have turned that around. With the Bullring, the Mailhouse and the joining up of the shopping centre of the Pallisades and the Bullring, the increases in footfall is showing that it is has become attractive to come to Birmingham to shop.

A number of large retail organisations are based in Birmingham and cities in the West Midlands. These include Dollond & Aitchison Ltd, ophthalmic and dispensing opticians with more than 1,000 employees, and Claire's Accessories UK Ltd, fashion accessories with a turnover in excess of £100 million, Halfords plc, the motor accessories, parts, cycles, cycle accessories retailer with more than 1,000 employees, is based in Redditch, just south of Birmingham. Intersport UK is based in Solihull, east of Birmingham, and the West Midlands Co-operative Society Ltd, the food and groceries, florists, pharmacy, travel agents and post offices retailer is based in Walsall, just north of Birmingham. In addition, companies like Aldi Stores Ltd, Heart of England Co-operative Society, Holland & Barrett Retail Ltd, James Beattie plc, Jewson Ltd, Lloyds Pharmacy and Poundlands Ltd are also based in the West Midlands.

## Employment trends

### General

The total of all employment located within Birmingham's boundaries in 2005 was only 3.6% (or 17,000) higher than in 1991. This compares to a UK increase of 17.8% for the same period. This growth in employment in Birmingham was made up of a 24.6% increase in service sector employment (up 81,800), as opposed to a 52% fall in local manufacturing employment (down 61,300 when the closure in April 2005 of MG Rover and Longbridge is included). The Longbridge closure meant the loss of 5,000 jobs at the plant and 25,000 more at suppliers and distributors, mainly in the West Midlands. In addition, there were also reductions since 1991 in the energy and water and construction sectors.

### Sectoral trends

Employment in the city is becoming increasingly service based, and even taking account of productivity increases in manufacturing, the nature of economic output in Birmingham is also becoming more service dependent. Manufacturing's 11.5% share of employment in Birmingham in 2005 is small compared to its share of 44% recorded in 1978.

The largest proportional falls in employment have been in the energy and water sectors and manufacturing. The largest proportional increases between 1991 and 2005 have been in financial and business services and in other services.

In the 1980s and 1990s, service sector employment in Birmingham was mostly driven by growth in the financial and business service sector. During the 2000s, this source of job growth has slowed down and the increase in employment in the public sector has taken up the slack.

Table 1: *Employment in Birmingham, 2005*

Male	%	Female	%	Persons	%	Sector
1,800	0.7	500	0.2	2,300	0.5	Agriculture and fishing, energy and water
48,400	19.7	13,100	5.3	61,500	12.4	Manufacturing
15,900	6.5	2,900	1.2	18,700	3.8	Construction
50,200	20.4	53,600	21.5	103,800	21.0	Distribution, hotels and restaurants
19,600	8.0	5,400	2.2	25,000	5.0	Transport and communications
57,300	23.3	49,000	19.6	106,300	21.5	Banking, finance and insurance
40,400	16.4	112,400	45.1	152,800	30.8	Public administration, education and health
12,400	5.0	12,700	5.1	25,000	5.0	Other services
<b>245,900</b>	<b>100</b>	<b>249,500</b>	<b>100</b>	<b>495,400</b>	<b>100</b>	<b>TOTAL</b>

Source: *Annual Business Inquiry, 2005*.

Note: *Figures are rounded to the nearest hundred. Numbers may not add up due to rounding.*

In 2005, the total number of people employed in distribution (including commerce) was 103,800, of which 51.6% were women and 48.4% were men.

### Distributive trades

Within the distribution and catering sector, retailing has shown the fastest employment growth in recent years, not surprisingly boosted by the reopening of the new, larger Bullring shopping centre. Hotels and catering has also had substantial job growth in the period from 1991 to 2005. Employment in wholesaling and the sale and repair of motor vehicles fell.

Table 2: *Distribution and catering employment in Birmingham, 1991 to 2005*

	1991	2005	Change	Percent change
Sale and repair of cars	9,828	9,044	-784	-8.0
Wholesaling	24,095	20,383	-3,712	-15.4
Retailing	37,598	47,048	9,450	29.5
Hotels and catering	21,457	27,350	5,893	27.5
<b>Total</b>	<b>92,978</b>	<b>103,825</b>	<b>10,847</b>	<b>11.7</b>

Source: *Birmingham City Council's Economic Strategy and Information Group, ONS*.

Adding the neighbouring Solihull area with its Touchwood centre to the Birmingham city centre, there are around 56,000 people currently employed in the retail sector in this area and it is predicted that another 5,000-plus jobs will be created in the next 10 years.

Developments like Bullring, other retail establishments and Touchwood in Solihull, together with Birmingham's Eastside regeneration, is and will be triggering a substantial increase in demand for well-qualified recruits.

The demand for new, well-qualified staff is particularly acute in Birmingham city centre, with stores competing directly for the best qualified staff. This has created difficulties for employers searching for talented people.

Just over a quarter of retail sector employees are drawn from minority ethnic communities, which more or less mirrors the local population. However, analysts believe that a significant increase in recruitment from these rapidly growing communities would go a long way towards addressing the skills deficits that may inhibit the sector's future expansion. With an influx of recruits to staff the new retail developments in Birmingham and Solihull, this is a genuine moment of opportunity for the retail sector to tackle its skills issues head on and to raise its profile as an exciting and rewarding career opportunity.

In terms of the workforce profile by age in the retail, hospitality and leisure sector for Birmingham and Solihull, it is no surprise that just over 35% of those employed are aged between 16 and 24. In comparison, 22% of the population is aged between 16 and 24. At 24%, the proportion of the workforce within the 25–34 age bracket is slightly above the proportion for the whole of the population in the Birmingham and Solihull area. At 18% and 22%, the proportion of the workforce for the 35–44 and 45+ age brackets, respectively, is well below the share of the total population within the same age brackets, at 26% and 28%, respectively.

### **Black and minority ethnic groups**

The city of Birmingham has a population of just over 1 million people, of which just over 30% are from black and minority ethnic (BME) communities, the largest of which is the Pakistani community (according to census data). There are 11 wards, which suffer from high unemployment figures and have high concentrations of ethnic minority (EM) communities.

By 2020, Birmingham is tipped to be one of the first ethnic majority cities. The employment gap in Birmingham stands at 23% between white and EM communities. There are high inactivity figures for the priority EM communities.

### **Employment change by gender and job tenure**

The years 1991 to 2005 saw a continuation of certain long-term employment trends in relation to gender and job tenure. Men's employment in the city fell by over 9,100 (down 3.6%), while women's employment increased by nearly 29,000 (up 13.1%). As a result of these changes, men's share of the employment based in Birmingham declined from 53.6% to 49.6% and women's share increased from 46.4% to 50.4%.

A second important development is the decline in full-time employment, which is something concentrated amongst men. Men's full-time employment fell by nearly 28,600, while that for women increased by a modest 1,500. In 1991, 77.7% of local employment was full time, but by 2005 this had fallen to 69.1%. Over the same period, part-time employment increased by nearly 46,900.

## Unemployment levels

The seasonal adjusted unemployment count for the UK fell by 9,300 from April to May 2007. The count then stood at 880,400 and the unemployment rate was 3.2%. In comparison, the seasonal adjusted unemployment count for the West Midlands region fell by 900 to 103,400 during the same month and the rate was 4.3%. In Birmingham, the seasonal adjusted jobless total decreased by 282 to 35,258 in May 2007. The adjusted unemployment rate for Birmingham was 8.8%, or more than double the rate of the West Midlands as a whole and almost three times the national unemployment rate.

## Skills levels

The UK government has defined a 'world-class workforce' as one in which the minimum qualification held is a national vocational qualification (NVQ) level 3, which is equal to two A levels. In 2005, 45% of the UK population of working age had attained NVQ 3, compared to 42% in the West Midlands region, but only 39% amongst Birmingham residents. Although the percentage was increasing in Birmingham, the main city in the West Midlands is still catching up.

As a major centre of higher education with three universities, Birmingham produced 8.3 graduates for every 1,000 of the resident population of working age. In the wider West Midlands, that figure was only 3.7 and in the UK it was 4.9. Birmingham supplies over 5,000 new graduates to the labour market each year, yet only around 4,000 new graduates from all UK higher education establishments settle in Birmingham to work. There is therefore an opportunity to meet the growing demand for highly qualified people by persuading more of those who study at the three local universities to also settle in the city after completion of their university degrees.

The good news for Birmingham is that more of the new generation of entrants to the working-age population in the city are better placed to progress further and gain NVQ 3 and NVQ 4 (degree level) qualifications. According to the DFEE, 58% of year eleven pupils in both Birmingham and England in 2006 had gained five or more A–C grade General Certificate of Secondary Education (GCSEs). The same percentage for 1997 was 35% in Birmingham, compared to 45% nationally.

Despite Birmingham's relatively low employment rate at 65.3% in 2005 compared to almost 75% nationally, the proportion of its working-age residents (10.5%) receiving work-related training is slightly higher than in the West Midlands region (10.4%) and not far behind that for the UK (11.2%).

According to the West Midlands Learning and Skills Council, the proportion of staff with skills deficiencies is double the regional average in retail, hotels and catering. A particularly high proportion of 16- to 24-year-olds that have successfully found jobs are working in low-skilled jobs in the retail sector. Some 41% of the workforce in retail are not qualified to NVQ level 2 and there is a growing demand for skills in management and leadership, IT and customer service. There is also a demand for flexibly delivered training units and credit-based learning.

The Learning and Skills Council is prioritising to significantly increase the retail sector-specific provision of further education and work-based learning to meet forecast growth and replacement demand in the sector.

## Bullring Jobs Team 2003

The Bullring development in 2003 learned a great deal from the Solihull Touchwood development three years earlier, which at first created a significant number of jobs within construction for the establishment of the centre. Afterwards, it created approximately 2,000 retail jobs for people in Birmingham.

The Bullring Jobs Team was established in 2002 and its main aims were to:

- access local jobs for local people, targeting residents in areas of high unemployment;
- meet the employment and training needs of employers moving to Bullring.

It was a partnership between Birmingham Alliance (the developer), Jobcentre Plus, Birmingham and Solihull Learning and Skills Council, Birmingham City Council and Pertemps Employment Alliance.

A commitment was made to resource a delivery team made up of secondees from each of the core partners. Managers skilled in retail sector training and recruitment, community outreach and employer engagement were seconded full time to the project from November 2002. The co-location of these individuals was key to the project's success and led to the establishment of a centralised delivery mechanism. Funding was provided by the Neighbourhood Renewal Fund and the European Social Fund as well as from the partners.

The outreach staff skilled to engage with local communities focused on wards with high unemployment, which often had high black and minority ethnic populations.

As with the Touchwood development, the public job centres and private agencies, the union, skills development institutions, Asian women, mother and toddler groups and the colleges were involved in awareness raising, recruitment to the companies and training and development for jobs in the Bullring development. Many potential employees and college students were offered short-term work experience and specific skills development at colleges in order to prepare them for work in retail.

A consortium of all the colleges in Birmingham and Solihull was established. It worked with a network of training providers to deliver both pre- and post-employment training. It was led by Solihull College, the leading retail college in the region.

According to Jenny Inglis, City Centre Director, employers like Selfridges were involved with colleges to train people for the retail jobs. The companies invested resources in promoting retail as a more attractive career. Job centres worked hard to redirect workers that were used for Christmas periods to other retailers that were busy enough to retain the workers between the busy periods.

A range of strategies and opportunities was used:

- leadership among partners;
- introductions made to retailers by the developer;
- development and publication of an employer 'welcome pack' and invitations to present at retailer briefings;

- establishment of operating bases, which enabled employers to interview prospective candidates before their site was built;
- identification of individual training needs and pre- and post-employment training;
- the Bullring recruitment bus touring Birmingham months before the opening;
- organisation of a three-day recruitment fair, which attracted over 10,000 visitors.

According to National Employment Panel, the initiative had the following outcomes:

- number of people into work: 2,604;
- percentage of jobs going to target area residents: 89%;
- percentage of people who were previously unemployed: 80%;
- percentage of jobs going to BME groups: 48%.

## Wage levels

In 2002, the Birmingham Economic Information Centre (BEIC) and the Birmingham Chamber of Commerce and Industry (BCCI) published its second annual wages survey. The survey provides information on basic salaries and hourly pay rates in Birmingham.

Table 3: *Median salaries for selected professional occupations in Birmingham in 2001–2002*

Professional occupations	Median annual earnings	Recruitment difficulties (%)	No recruitment difficulties (%)
Manufacturing professionals and technicians	£20,000	47	39
Professional engineers	£24,000	44	46
Technical engineers	£19,250	54	35
Construction sector professionals	£25,000	58	42
Hospitality management and supervision	£16,000	54	45
Financial services staff	£20,000	24	76
Legal and associated staff	£22,122	20	80
Advertising and marketing professionals	£20,000	26	70
Computer professionals	£21,000	56	43
Accountancy occupations	£18,000	29	71
Consultancy occupations	£30,000	39	54
Architects/construction services professionals	£24,000	65	35
Retail sector management	£23,000	11	84
Distribution occupations	£23,000	25	70



In 2001–2002, the two professional occupations within the distributive trades had average median annual earnings comparable to the other professional occupations in Birmingham. At a median of £23,000 per annum, the two professional occupations are much higher than the lowest of hospitality management and supervision at £16,000 and significantly lower than the £30,000 per annum of consultancy occupations. In 2001–2002, only 11% and 25% of retail and distributive business, respectively, had recruitment difficulties in relation to the selected occupations. In comparison, businesses in construction, hospitality, IT and to some extent manufacturing had significantly more difficulties in recruiting professionals.

Table 4: *Median hourly rates for selected occupations in Birmingham in 2001–2002*

<b>Selected occupations</b>	<b>Median hourly earnings</b>	<b>Recruitment difficulties (%)</b>	<b>No recruitment difficulties (%)</b>
Other manufacturing occupations	£6.65	23	59
Process line operatives	£6.59	50	17
Manufacturing secretarial, clerical and support staff (SC&SS)	£6.84	16	72
Engineering production	£6.80	37	53
Engineering (SC&SS)	£6.33	19	71
Construction workers	£7.20	58	42
Construction (SC&SS)	£6.04	20	71
Restaurant, catering and kitchen staff	£4.10	45	53
Hotel staff	£4.50	40	56
Hospitality (SC&SS)	£5.40	20	68
Financial services (SC&SS)	£6.59	0	100
Legal services (SC&SS)	£7.00	18	74
Advertising and marketing (SC&SS)	£6.08	12	88
Computer services (SC&SS)	£6.00	13	82
Accountancy/management consultants (SC&SS)	£6.26	28	72
Architects/construction services (SC&SS)	£7.45	29	67
Retail staff	£4.87	26	66
Retail (SC&SS)	£6.18	33	47
Warehouse and delivery staff	£5.63	33	56
Wholesale and distribution (SC&SS)	£6.00	20	68

In 2001–2002, retail and wholesale and distribution sales clerical and service support (SC&SS) had, at £6.18 and £6.00, respectively, average median hourly rates compared to other occupations in Birmingham. Similarly, warehouse and delivery staff had an average median hourly rate of £5.63. However, retail staff, with an average median hourly rate of £4.87, was among the lowest; only hotel, restaurant, catering and kitchen staff had lower median hourly rates. In 2001–2002, only between 20% and 33% of retail and wholesale businesses had recruitment difficulties in relation to the selected occupations. In comparison, businesses in construction and, to some extent, hotel and catering had significantly more difficulties in recruiting the selected occupations.

More recent data from 2006 (see Tables 5 to 9) suggest that there is a significant difference between median earnings as an average across England and Wales compared to the West Midlands and especially Birmingham. Workers in the West Midlands, and particularly in Birmingham, enjoy average earnings that are lower than the average for all of England and

Wales. For all workers, the hourly pay was 62 pence lower in Birmingham than in England and Wales as an average. The biggest difference of almost £1 was for male workers, whereas the difference in hourly pay between female workers in Birmingham and for England and Wales as an average was only 12 pence. The average hourly pay for male workers was 21% higher than the hourly pay for female workers in Birmingham. For all of England and Wales, the hourly pay of male workers was 31% higher than that of female workers.

Furthermore, Tables 8 and 9 indicate that full-time workers were paid on average 65% more per hour gross than part-time workers in Birmingham.

Table 5: *Median earnings – all workers*

Area	Number of jobs	Weekly pay	Hourly pay	Hours worked
England and Wales	20,390,000	£368.5	£10.03	37.0
West Midlands	2,059,000	£347.6	£9.38	37.0
Birmingham	329,000	£344.5	£9.41	37.0

Source: *Annual Survey of Hours and Earnings, 2006.* (Note: All figures refer to gross pay.)

Table 6: *Median earnings – male workers*

Area	Number of jobs	Weekly pay	Hourly pay	Hours worked
England and Wales	10,369,000	£460.0	£11.47	37.8
West Midlands	1,065,000	£431.7	£10.68	38.7
Birmingham	163,000	£409.7	£10.45	37.7

Source: *Annual Survey of Hours and Earnings, 2006.* (Note: All figures refer to gross pay.)

Table 7: *Median earnings – female workers*

Area	Number of jobs	Weekly pay	Hourly pay	Hours worked
England and Wales	10,021,000	£281.7	£8.74	34.5
West Midlands	994,000	£267.8	£8.19	33.0
Birmingham	167,000	£284.6	£8.62	34.5

Source: *Annual Survey of Hours and Earnings, 2006.* (Note: All figures refer to gross pay.)

Table 8: *Median earnings – full-time workers*

Area	Number of jobs	Weekly pay	Hourly pay	Hours worked
England and Wales	15,086,000	£451.6	£11.30	37.5
West Midlands	1,530,000	£421.1	£10.51	37.5
Birmingham	244,000	£412.0	£10.60	37.5

Source: *Annual Survey of Hours and Earnings, 2006.* (Note: All figures refer to gross pay.)

Table 9: *Median earnings – part-time workers*

Area	Number of jobs	Weekly pay	Hourly pay	Hours worked
England and Wales	5,304,000	£137.5	£7.00	18.8
West Midlands	529,000	£132.5	£6.67	18.7
Birmingham	86,000	£121.6	£6.42	17.9

Source: *Annual Survey of Hours and Earnings, 2006.* (Note: All figures refer to gross pay.)

## Union representation

The union USDAW has a significant membership base at the retail stores in Birmingham. However, its main membership base is drawn from the largest UK retailer, Tesco. USDAW has a national agreement with Tesco and almost half of Tesco's workforce are members of the union. The union recently achieved a 4% pay increase for its members in Tesco. Considering the pensions and other benefits at Tesco, USDAW is of the opinion that the Tesco workforce has one of the best packages in the UK retail sector. A growth area for USDAW in the Birmingham/West Midlands area is the wholesale and distribution sector. Due to its geographical location in the middle of the country and the extensive transport network, with motorways all around the city, the West Midlands has become quite a hub for establishing distribution centres. These centres are placed near the motorways – the M40, M5, M6, M1 and M42 – that surround Birmingham and lead to the south, south-west, the west, the north-west and the north-east.

Some of these distribution centres employ up to 1,000 people at each unit, of which many are from Eastern European countries or from Indian, black African/Caribbean, Pakistani, Bangladeshi or other Asian ethnic groups. USDAW has produced recruitment material in the immigrants' own languages and aims to recruit union representatives at the distribution centres who have ethnic backgrounds similar to the majority of the workforce at the centres. For example, having a Polish union representative makes it easier to communicate with a workforce that predominantly consists of Polish workers and can support the recruitment of new members.

USDAW has introduced a lifelong learning pack aimed at adults who left school early and would like to go back into learning. According to USDAW, research has shown that continuous lifelong learning will reduce sickness and absence levels, and while it will produce a higher skilled workforce, it also helps boost workers' self-confidence. The scheme is being implemented at union lifelong learning centres, usually placed at the large distribution centres. Workers from other countries that have difficulty with the English language are offered a valuable service at these union lifelong learning centres. Upon joining the union, these workers and their family members will be taught English and other relevant subjects at the learning centres. The union learning centres have already helped hundreds of workers without formal qualifications back into learning.

In relation to the retail sector, USDAW is concerned about crime. With the increase in opening hours, there has been a year-on-year increase in crimes on store personnel. Many of USDAW's members are left in difficult situations in the evening, when there are few customers and reduced staff levels. As an example, a worker may be left alone with one other colleague at an express store. Young people may come in wanting to purchase alcohol. It is the duty of this worker to ensure that these kids are indeed 18 years of age (which is the legal age limit for purchase of alcohol). In such situations, there are more and more examples of customers attacking and abusing retail staff. USDAW has introduced a new campaign called 'Freedom from Fear' whereby USDAW is campaigning for ID cards for all, as this would take the pressure off its members. Furthermore, USDAW wants crimes on retail staff in shops to be considered and treated as serious crimes., USDAW believes there should also be key performance indicators on solving the problem of crime in retail shops for local authorities and the police.

Apart from crime, USDAW concerns include employment contracts and breaks within the retail sector. According to the working time Directive, the rights of workers in the UK are such that after 12 months of work there needs to be specific reasons for dismissal. As a result, some employers have produced 11-month renewable contracts to their employees that would then be renewed subject to demand. The Directive also states that workers working six hours or more are required to be given a 30-minute break. Again, USDAW have come across employers that let their employees work six hours without a break.

Apart from recruitment of new members at the large distribution centres, USDAW focuses on the ancillary services around the stores where the union already has a good working relationship. As an example, USDAW has recruited cleaning workers that clean at supermarkets. The cleaning companies are large operators that run huge contracts with the supermarket chains. For large retail operators like Tesco, their commitment to human rights also commits them to set standards for their suppliers, including the cleaning operators, in terms of how they treat their staff and whether they allow them to organise in unions. Another example is agencies that hire out temporary workers for Christmas and summer periods. People working for such agencies often have no rights, but organising them is extremely difficult.

According to Ron Hemming, unions should have done more in recruiting new members under the Labour government. Instead, most of the unions lost members during that period. In fact, USDAW is one of the few unions that have increased its membership. Should future elections lead to a change of government, Ron Hemming foresees more difficult times ahead for the unions in the UK in a less favourable political climate.

## **City Centre Partnership**

The Birmingham City Centre Partnership (BCCP) was established in 2002. Its main aim was to improve the management, including security, cleaning and entertainment in the city centre of Birmingham. In doing so, the City Centre Partnership worked closely with the Birmingham City Council, who are responsible for street cleaning and the Birmingham police, who are responsible for safety in Birmingham. A city centre director was appointed to work on behalf of the partnership, initially on a three-year contract.

The three-year contract was subsequently extended indefinitely – an indication of the success of the experiment. At the beginning, the City Centre Partnership did more with the public sector, coordinating activities with the Birmingham council and police. Today, the partnership works more with the private sector. The management of the organisation has been geared towards supporting the private retail sector and gradually the work of the City Centre Partnership has become more and more strategic.

A number of challenges are impacting on the work and priorities of the City Centre Partnership, including:

- the increased importance of Birmingham city centre as an economic growth area;
- the need for ease of access and movement, maintaining quality places and promoting positive experiences in today's cities;
- the continued changes to the city centre environment and mixes of use through further property developments and business investments;
- raised expectations among both residents and visitors due to consumer trends, emerging lifestyles and business innovations.

The key recent results of the City Centre Partnership in collaboration with other partners have been the two Business Improvement District (BID) proposals and projects.

Given the listed challenges and the achievement of the two BIDs, the City Centre Partnership prioritises the following actions for the period 2007 to 2009 (City Centre Partnership strategy 'Streets Ahead'):

- support Retail Birmingham BID;
- support Broad Street BID;
- promote and support the development of at least one further BID;
- ensure the Partnership's interests are strongly represented in the City Centre Master Plan process and proposals for a City Centre Development Company;
- continue to enhance the Birmingham Christmas 'offer';
- build on the success of 'Britain in Bloom' in Birmingham;
- maintain standard of 'cleanest city' set in 2007 and promote measures to de-clutter and improve appearances;
- gain recognition as one of the UK's safest city centres;
- add value to the city centre events programme to increase animation, excitement and uniqueness;
- seek further national recognition for Birmingham city centre through relevant awards.

The Birmingham City Centre Partnership has an organisation of 30 staff and a board of relevant stakeholders including the two BIDs, property owners/developers, small/independent businesses, Birmingham City Council, Marketing Birmingham,<sup>1</sup> local media, transport, West Midlands Police, Birmingham Forward<sup>2</sup> and co-opted members.

## Business Improvement Districts

The Broad Street Business Improvement District was established in July 2005 following a successful ballot of 262 businesses throughout the Broad Street area. The ballot had a 92% 'Yes' vote, which is still amongst the highest of all BIDs in the UK to date. The BID term lasts for five years, until March 2010. Local businesses with a rateable value over £10,000 contribute to the BID through a small percentage levy based on rateable value. In addition, the BID also attracts substantial voluntary contributions and aims to raise in excess of £1.7 million in its first five-year term from property owners and developers. These funds will be invested entirely on improvements in the area to ensure a prosperous business environment. The income in levies and contributions represented almost £280,000 in the first nine months of the BID.

The BID is managed by the Broad Street Partnership Limited, which has a board of directors who represent local businesses, property owners and developers, the West Midlands Police, Birmingham City Council, the Leisure Forum (representing bars and clubs) and the City Centre Neighbourhood Forum. The BID has two full-time managers who manage the area on a day-to-day basis.

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<sup>1</sup> <http://www.marketingbirmingham.com/>.

<sup>2</sup> <http://www.birminghamforward.co.uk/info/profile.html>.

The Broad Street Business Improvement District was one the first BIDs in the country. Its aim was to create a more attractive, better marketed, brighter, safer and cleaner business environment in the city centre of Birmingham. In 2006–2007, the Broad Street BID investments led to:

- four dedicated night-time street wardens patrolling Broad Street and an additional two wardens patrolling between 8 a.m. to 10 a.m. to provide reassurance to businesses and their employees;
- a 59.6% reduction in general crime in the Broad Street area during the BID's first year; violent crime was also down 27.6%;
- the creation of a more welcoming environment through floral and lighting enhancement;
- Best of Broad Street (BOBs) Awards. Now in their second year and continuing to grow, the BOBs Awards is an annual event to reward venues on and around Birmingham's 'Golden Mile' for their input in making the area a safe and enjoyable place for a night out.

In 2007–2008, the Broad Street BID will introduce a business liaison manager, provide a sustained marketing campaign, continue the street cleaning, floral enhancements and ongoing strategy to bring vibrancy to the area through the effects of light and continue to ensure that a safe business environment is maintained with the assistance of the Retail Crime Operation and Birmingham City Centre Partnership.

Following on from the successful Broad Street Business Improvement District (BID) project, 69% of the retailers that turned out for the vote (49% of all retailers in the area) in Birmingham recently voted in favour of a creating a new BID to coordinate street activity and marketing between all of the main shopping centres and streets in the city centre. Entitled Retail Birmingham, the second and new BID in Birmingham will generate an investment of at least £5 million over the next five years (2007 to 2011) and started on 1 April 2007.

The Retail BID will be operated by Retail Birmingham Limited, a new independent and private sector-led company. The board of directors comprises representatives from across the retail sector and key stakeholder organisations.

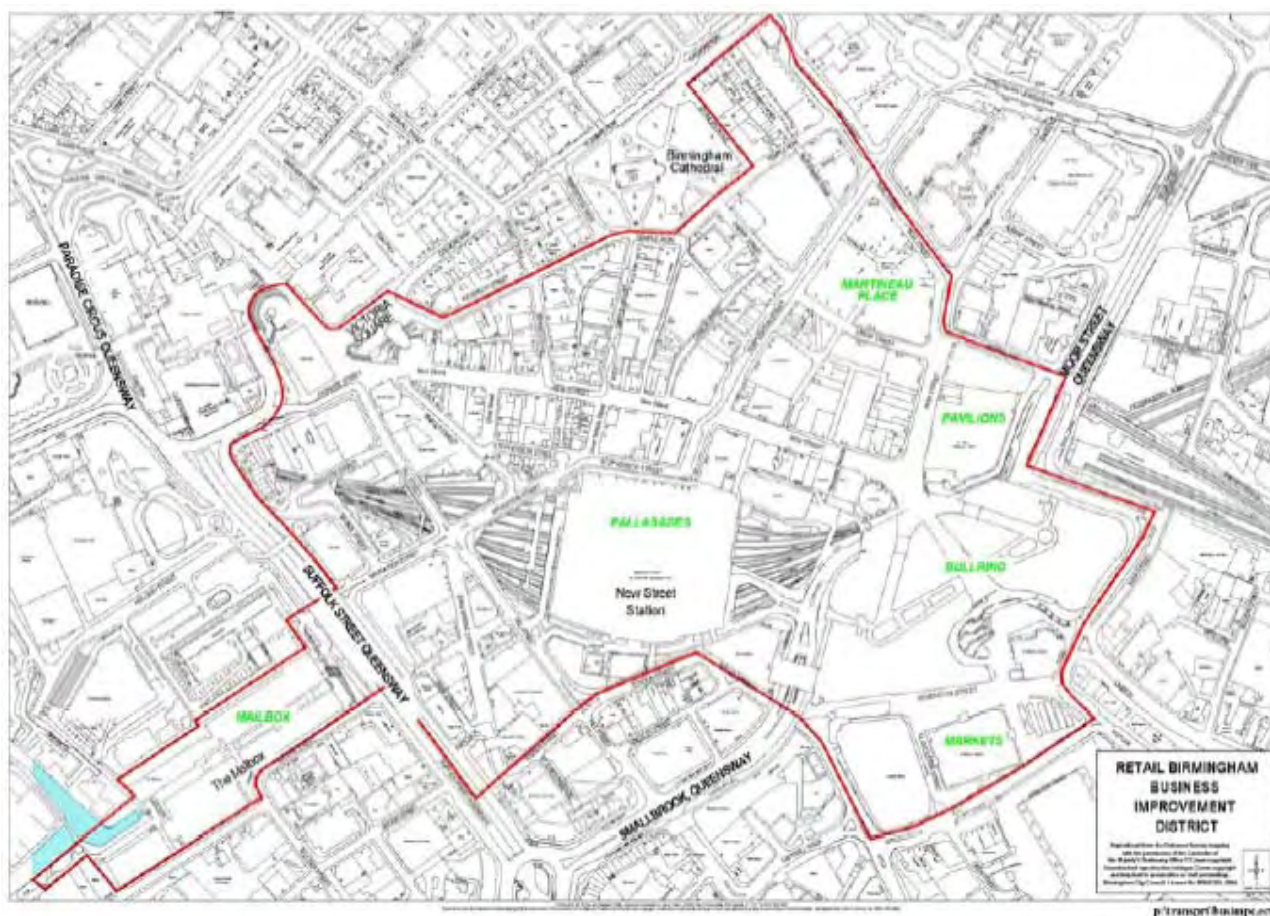
With two BIDs running, the City Centre Partnership has intensified the communication with the private companies. Recently, it has set up the Retail Forum, which holds breakfast meetings that give the retailers the chance to contribute and feed their input to coming plans. It also gives the retailers the chance to meet the project champions and discuss the issues in an open forum. In addition, the Partnership produces a newsletter that goes out to all retailers. The newsletter tells stories about the projects and lists forthcoming events and activities.

In relation to the new Retail BID, a retail business manager has been appointed to ensure a strong link between the needs of the retailers and the planned activities of the BID. The chosen person has experience from a similar suburban BID project in Erdington (a suburb of Birmingham), where he was town centre manager, as well as 20 years' experience as a retailer.

According to Jenny Inglis, Birmingham city centre retailing can do much to improve the overall retail sales during the peripheral hours from 5.30 p.m. to 9.00 p.m., but it requires all retail outlets to coordinate closing times. Although the footfall may be lower during this period, the spending is likely to be higher, because consumers at this time of day are out to buy and not just out to find good offers. The footfall in the early morning and in the evening consists of commuters on their way home from work. Currently, however, there is insufficient consistency in opening and closing times across the retailers and therefore consumers are not offered the full variety of shops.



Figure 1: Map of the Retail Business Improvement District area



## Large-scale retail initiatives

In 2006, Birmingham stepped out in style with a collection of fashion-focused projects aimed at highlighting its stylish new image and status as the best retail destination outside London's West End. Birmingham City Centre Partnership, the Bullring, the Mailbox, House of Fraser and Harvey Nichols were behind the campaign, which aimed to showcase the city's fashion, jewellery and shopping scene, including designer labels, high street brands, independent boutiques and local designers/makers.

Under the collection name Style Birmingham, the campaign has included a new shopping website for the city centre, [www.stylebirmingham.com](http://www.stylebirmingham.com), a magazine/retail directory, Style Birmingham: The Magazine, first published in September, and again at the Autumn/Winter 2006 fashion show, the Style Birmingham Show, which took place in October 2006 with the appearance of celebrities and leading designers.

Kevin Breese, Chair of Retail Birmingham, said at the time: 'There has been a multi-million pound makeover of the city's retail scene with the opening of flagship developments like the Mailbox and Bullring, prestigious stand-alone stores like Louis Vuitton and Urban Outfitters and major store refurbishments at House of Fraser. We've really stepped out in style and have decided to make the most of our new standing as the best shopping destination outside London's West End. [The CACI Retail Footprint Survey in 2006 ranked Birmingham second to London's West End, ahead of

Glasgow, Manchester, Leeds and Nottingham, <http://www.caci.co.uk>.] Style Birmingham marks the start of a new era in promoting the city's retail scene and is a fabulous example of what retailers and city organisations can achieve with a collaborative approach.'

Table 10: *Retail footprint 2006, top 10*

Retail centre	2005 ranking	2006 ranking
London – West End	1	1
Birmingham	2	2
Glasgow	3	3
Manchester	4	4
Nottingham	5	5
Leeds	6	6
Bluewater	7	7
Norwich	13	8
Liverpool	8	9
Newcastle-upon-Tyne	9	10

The BCCP is involved in the steering group that oversees Birmingham's participation in the annual Britain in Bloom competition. In 2005 and again in 2007, it resulted in the city centre floral trail being selected to represent the region in the national Britain in Bloom finals.

The BCCP have also been instrumental in introducing a wide range of Christmas events and decorations, like the largest authentic German Christmas market outside of Germany and Austria. The 80 stalls cover the whole of Victoria Square and stretch down New Street.

The BCCP also leads Birmingham's attempt to succeed in the Cleanest City competition, which is a keenly fought biennial contest open to all 66 UK cities. In 2005, the finalists were Birmingham, Bristol, Cardiff, Cambridge, Edinburgh, Ely, City of London, Manchester, Truro and Westminster, and Birmingham came second in the competition. It is a contest to find the community with the cleanest parks, gardens, streets and car parks. In 2007, Birmingham achieved its goal to be named the cleanest city in the UK by winning the top award.

### **Bullring shopping centre**

The redevelopment of the 40-acre Bullring site is a milestone in the city's history of innovation. The scheme has been cited as the major catalyst for Birmingham's transformation into a retail capital. Significant facts about the Bullring development are:

- the Bullring provides over 110,000 square metres (1.2 million square feet) of retail space;
- there are some 160 shops and kiosks within Bullring;
- some 3,100 new car parking spaces were created for Bullring (900 in Indoor Market car park, 1,000 in Bullring car park and 1,200 in Moor Street car park);
- over 8,000 jobs were created in retail, hospitality and supporting services within Bullring.



There are 160 retail units at the Bullring and in July 2007 only two were empty without tenants. Since the opening of the Bullring in the spring of 2003, there has been a turnover of retail outlets, mainly due to national brands going into receivership. Companies like Kookai, Music Zone, All Sports and Natural World have closed down their store at the Bullring after going into receivership.

The Bullring has introduced new shopping names in Birmingham, notably Selfridges, plus a number of others. Sixty of the stores that originally opened in the Bullring were not previously in Birmingham. Most of the retailers are UK national operators and many of them used the opportunity to open up second and third stores in Birmingham. As a result, the Bullring has not introduced much more in terms of variety.

Responding to customer needs, the Bullring will be bringing in Tommy Hilfiger and similar new brands in the near future.

According to Tim Walley, Bullring manager, the Bullring measures its success in terms of the footfall and the sales density achieved. At the Bullring, the rent paid is dependent on the sales density, so the higher the sales, the higher the rent paid to the landlord.

The Bullring management works with the tenants to develop their business. Every week, the tenants send in their sales figures, and where tenants are struggling to produce satisfactory sales, the Bullring management offers relevant advertisement and promotion opportunities. This could be via the plasma screens around the Bullring or the magazine that the Bullring distributes to 50,000 households within the catchment area covering out-of-town areas like Solihull, Four Oaks and Sutton Coldfield. Similarly, every year there is a promotional event at the beach on the square, where tenants are invited to take part.

Despite being in the middle of the country, Birmingham can boast of having its own beach after 65 tonnes of sand was dumped in St Martin's Square in June 2007. The Bullring beach remained in place until September 2007 and staged live music, beach volleyball, sand sculpture and soccer skills training.

Increasingly, there will be competition from similar retail developments in other Midland cities. A shopping centre will be opening in Derby in 2007. Leicester will open in 2009 and Wolverhampton is also planning a development. The Merry Hill centre, located at Brierley Hill, near Dudley, may also be able to create further developments subject to being identified as an inner city area. The Merry Hill centre has around 310 stores and a total retail floor space of 148,000 square metres (1.593 million square feet). As well as a large indoor shopping centre, Merry Hill is home to a multiplex Odeon cinema and a number of larger shops, such as Staples, PC World and Comet.

The Bullring development also included an investment of £4 million in information and communication technologies. As a result, the Bullring is offering state-of-the-art online information from touch screen information stands placed all over the Bullring. From these touch screens, customers can get access to real-time traffic, rail and bus information, information about all the various shops and their offers and information on vacant jobs in the different stores. In addition, using their Bullring gift card, which was introduced two years ago, the customers can look up their account balance. The Bullring receives 70,000 hits per week on the touch screen monitors and, according to Tim Walley, the stores do not need to advertise sales and shop assistant jobs elsewhere. They get all the applicants they require from advertising on the Bullring system.

The Bullring has been a real boost to Birmingham's job market, creating in the region of 8,000 jobs, both full and part time. Opportunities available include sales and management, as well as the roles presented in customer service, distribution, security and other support areas.

### **Mailbox development**

For the first time in Birmingham's history, the Mailbox development offers an integrated lifestyle choice. It brings together designer fashion and lifestyle shops, luxury apartments, two hotels, 24-hour parking and an array of restaurants and café bars. It is placed in a waterside setting two or three minutes' walk from the main train station, New Street.

The Mailbox features a 200-metre open-air pedestrian route carved through the full length of the building and the largest collection of stand-alone designer stores outside London, including international brands such as Emporio Armani, Harvey Nichols, Jaeger and Hugo Boss, plus other designer retail stores incorporating The Aga Shop and Fired Earth through to Bang & Olufsen, Descamps and The Art Lounge, a contemporary art gallery.

There is a hair and beauty salon, a wide variety of restaurants and café bars. The Mailbox is also the regional base for some of the UK's largest businesses, including Railtrack, Cable & Wireless and the BBC in the Midlands. Finally, the Mailbox also has the Ramada and Malmaison hotels.

At the rear of the Mailbox, an extensive residential building is being constructed. It is planned to be completed in late 2008 and will include several studios, one- and two-bedroom apartments.

In fact, there are many residential developments either planned or under construction between 2005 and 2010 in Birmingham, totalling more than 8,000 residences at more than 30 different sites (source: Development Monitoring Schedule, June 2005, Locate in Birmingham).

### **Various retail examples**

#### **Luxury goods retailer**

According to Kevin Breese, general manager at the Harvey Nichols store in Birmingham, the location of the Harvey Nichols store at the Mailbox is excellent. 'The Mailbox is the best location for Harvey Nichols, because this is where other similar high-end shops are located and the rent is much lower than at the Bullring. At the Mailbox, the quality of the footfall is what counts'.

The Harvey Nichols store in the Mailbox is expanding by an additional 40%. The aim is to primarily expand the women's wear and accessories section with new fashion items. The men's clothing and the food section are the right size, but will also be enhanced to introduce new products.

In terms of recruitment, Harvey Nichols receives many job applications, but according to Kevin Breese very few good ones. Harvey Nichols is an attractive place to work, but the best candidates are those that have a flair for fashion and style. The personnel turnover is not that high, but quite a few of the employees have moved on to try out similar jobs in London.

Harvey Nichols has well-established collaborations with the Retail Academy at the college in Solihull, where many of its employees undertake further education and training.

#### **Small independent retailer**

Helen Hulston has worked for more than 13 years in her small specialised jewellery shop in the Great Western Arcade. The first 10 years she worked for the previous owners and for the past three years in her own name.

She has experienced a great shift in the market, particularly at the location of her shop. Before, the Great Western Arcade was part of the affluent shopping area of the city, surrounded by the prominent large department stores like House of Fraser and the John Lewis Partnership department store. Today, the Bullring is the focal point and the Arcade benefits more from passing trade. This includes people working in the city centre stopping on the way to and from work or taking lunchtime off to do a bit of shopping. Because of this, the busiest time for her shop is during the week in the morning, during lunchtime (1 p.m. to 3 p.m.) and again from 4 p.m. to 5.30 p.m.

The shop indemnity insurance requires that there are always two people in the shop for security reasons, but on Saturdays and in between the above hours, the shop could easily be run by one person. Before the Bullring, Saturdays were always the busiest time of the week. This is no longer the case. At Christmas, which is still the busiest period for the shop, Helen will employ an additional part-time lady to cope with the added footfall. Nevertheless, the Christmas sales are only half of what they were before the Bullring opened.

Helen has had a website created for her jewellery shop, but she cannot see herself selling jewellery online. In her opinion, most of the customers will want to see and feel the jewellery before they actually buy it. She does some advertising in a local magazine called Birmingham Life, although she cannot afford to spend too much on promotion. In addition, she has a mailing list of existing customers that she sends offers to. She has recently committed herself to advertising in a Lamborghini brochure. The Helen Hulston Jewellery shop sells high-end jewellery and therefore aims its promotion at the more affluent segments of the population.

As a jewellery retailer, the competition has shifted in recent years. Today, most shops will sell accessories including low-price jewellery. New actors have emerged and even grocery retailers like Tesco and Sainsbury's sell jewellery. Although Helen Hulston Jewellery is in the high-end jewellery market and mainly sells to affluent consumers, Helen can sense perceptions and purchasing habits changing.

Helen sits on the board of the Retail BID and sees an important role in representing the independent retailers that make up approximately half of the 498 retailers taking part in the BID. Nevertheless, as a small operator it is difficult to find the time to attend all the meetings that are planned, as Helen needs someone to cover for her when the meetings take place during the working day.

She has tried to involve the other tenants in the Great Western Arcade in the work around the BID. However, the other tenants focus more on the day-to-day running of their businesses and it has been hard work drumming up any interest. Even at the Great Western Arcade level, the tenants are losing the enthusiasm because business is stagnant. She tried to establish a tenants association but was never successful. Currently, between 30% and 50% of the 42 retail units in the Great Western Arcade are empty. As a result, there is too little to catch the interest of customers in the Arcade and fewer of them will stop on their way through.

The Great Western Arcade is under redevelopment and, being a listed building, it is a difficult and complex task that will take a while to complete. The Arcade management company has begun redeveloping an office block at the entrance of the Arcade and aims to work its way through to the other end. With the refurbishment and re-branding of the Great Western Arcade, there is hope that the attractiveness of the Great Western Arcade will return. Helen has seen pictures of how the Arcade management company has done similar refurbishments with good results for tenants and businesses in other cities. She hopes that the re-branding of the Great Western Arcade as well as the marketing and promotion through the Retail BID can help improve business for all the tenants in the Great Western Arcade.

With the new Eastside development and the planned entertainment facilities, Helen foresees the focus shifting from the Bullring to the Eastside in five to 10 years' time when that is completed. The challenge as she sees it will be to constantly increase the total footfall and get consumers to move around all of the shopping areas of the city centre.

### Large high street retailer

There are six Boots shops in Birmingham, of which the one in the High Street is the biggest. It employs 200 people, of whom 70% work part time. Ian Brown has been a manager of the Boots store for two years. Before that, he managed stores in Meadow Hall (a large shopping centre) in Sheffield and stores in Derbyshire, where he lives.

Recruitment of full-time employees is important for Boots. Boots is continuously developing many of its full-time staff to become team leaders. The team structure is an essential part of the Boots management philosophy.

According to Ian Brown, it is fairly easy to recruit new general sales assistants and operations staff. He believes Boots offers competitive salary levels and has a good reputation as an employer. With regard to consultants within fragrance and other areas, it can be difficult to get qualified staff.

Boots prioritises the development of its staff both in terms of induction and further training. Every employee will have a three-month training plan, including health and safety and fire training as well as company-specific elements. In addition, there is likely to be product-specific training.

With the introduction of the Bullring shopping centre, the Boots store experienced an initial drop in sales, but this has since been recouped and in the last couple of years the store has experienced an increase in sales. In other words, the Boots store is benefiting from the general increase in numbers of visitors in the city centre.

Ian Brown sees time becoming a precious factor for customers and workers. Not just now, but even more so in the future, it will be a priority for Boots to serve customers as quickly as possible while at the same time ensuring that customers have a pleasurable experience. Boots combines online and physical services to make shopping at Boots a better experience. The boots.com website helps the customer to prepare him or herself before entering the physical shop.

The USDAW union has members at the Boots store and the company has a good working relationship with the union. Ian Brown has never had an issue with the union and union representatives primarily get involved in relation to grievances. The membership still represents a low percentage of the total staff at the Boots store.

In relation to the Retail BID, Ian Brown feels the focus is on changing the perception that people have about Birmingham in and around the city. The general perception is still that Birmingham is not a safe place to shop, that it is difficult to get to and that it is difficult to find one's way round the city centre. The City Centre Partnership and the private actors fronting the BIDs believe that these perceptions can and must be changed in order to improve the consumer footfall all over the city centre shopping areas even more than it already has been.

According to Ian Brown, it is about extending the busking areas, creating activities across the whole city centre and using floral displays and lighting to show the attractiveness of the city centre.

## Conclusion

A number of conclusions can be drawn from the case study.

- For many years, Birmingham city centre was perceived as an unattractive place to shop by customers living in the greater Birmingham area and as a result the retail centres in peripheral towns like Sutton Coldfield, Leamington Spa and Solihull developed and grew to significant sizes.
- More recently, through significant urban and retail developments and extensive cooperation between public and private actors, Birmingham city centre has become an attractive place to shop.
- The major retail development of the Bullring, with its 160 retail units, has led to a drop in consumer footfall in the city centre and many other shops in the city centre. The small independent retail shops in particular have felt the changes in terms of decreases in sales for shorter or longer periods after the opening of the Bullring in 2003.
- The retail business community in Birmingham, including both independent stores and larger chains, are working together with private developers and public authorities to increase and spread the consumer footfall even further for the benefit of all retail stores, restaurants, cafés and bars in the city centre.
- The actions led by two Business Improvement District projects are focused around achieving a clean and safe city, creating attractive events, streets, places and experiences, making it easy to get into the city and getting around it as well as promoting the city as the best shopping experience outside the capital.

There are several challenges facing the Birmingham in the future:

- Although educational attainments of young people have risen, a large proportion of the working-age population is without qualifications. Over a third of working-age people in the Birmingham and Solihull are without any qualifications. As a result, the employment rate for working-age residents is low and many are excluded from the labour market.
- High unemployment rates in Birmingham and especially among black and ethnic minorities and other people with no or low skills means that it is fairly easy to recruit unqualified or low-qualified staff. At the same time, however, it is difficult to fill certain vacancies for well or highly qualified staff. This is also the case for the distributive trades.
- Employment growth within Birmingham has been slower than in the UK since the upturn began in 1993 and local economic growth has also lagged behind national averages.
- Like many urban areas, crime and the fear of crime is perceived to be a weakness by the business community.
- On the other hand, the scale of planned major development projects within Birmingham and Solihull are such that their successful completion and integration could lead to growth rates higher than the national average both in terms of economy and employment in the next 10 years and retail and wholesale could represent an increase of almost 10,000 more jobs, or an increase of 8%.
- Because skill levels are low in the sector, educational institutions and employers will need to significantly increase the retail sector-specific provision of further education and work-based learning to meet forecasted growth and replacement demand in the sector.

## Interviews

Jenny Inglis, Director of City Partnership, Birmingham, 10 July  
Ian Brown, General Manager, Boots, Birmingham, 10 July  
Helen Hulston, Hulston Jewellery Shop, Western Arcade, 10 July  
Kevin Breese, General Manager, Harvey Nichols, The Mailbox, 10 July  
Tim Walley, General Manager, Bullring management, 10 July  
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