

2021

BUSINESS & SERVICES

# The Parliamentary Review

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## The Rt Hon Kwasi Kwarteng MP

Secretary of State for Business,  
Energy and Industrial Strategy

This year's *Parliamentary Review* reflects on a tumultuous and extraordinary year, globally and nationally. As well as being an MP, I am a keen student of history, and I am conscious that 2020 would mark the end of an era. It will be remembered as the year in which we concluded Brexit negotiations and finally left the European Union. Above all, it will be remembered as the year of Covid-19.

In our fight against the pandemic, I am delighted that our vaccination programme is beginning to turn the tide – and I pay tribute to the British businesses, scientists and all those who have helped us to achieve this. But the virus has dealt enormous damage, and we now have a duty to rebuild our economy.

We must ensure that businesses are protected. We have made more than £350 billion available to that end, with grants, business rates relief and our furlough scheme supporting more than 11 million people and jobs in every corner of the country, maintaining livelihoods while easing the pressure on employers.

The next step is to work with business to build back better and greener, putting the net zero carbon challenge at the heart of our recovery. This is a complex undertaking, but one which I hope will be recognised as a once in a lifetime opportunity.

Through the prime minister's ten point plan for a green industrial revolution, we can level up every region of the UK, supporting 250,000 green jobs while we accelerate our progress towards net zero carbon emissions.

With our commitment to raise R&D spending to 2.4 per cent of GDP and the creation of the Advanced Research & Invention Agency, we are empowering

our fantastic researchers to take on groundbreaking research, delivering funding with flexibility and speed. With this approach, innovators will be able to work with our traditional industrial heartlands to explore new technologies, and design and manufacture the products on which the future will be built – ready for export around the globe.

And I believe trade will flourish. We are a leading nation in the fight against climate change. As the host of COP26 this year, we have an incredible opportunity to market our low-carbon products and expertise. Our departure from the EU gives us the chance to be a champion of truly global free trade; we have already signed trade deals with more than 60 countries around the world.

As we turn the page and leave 2020 behind, I am excited about the new chapter which Britain is now writing for itself, and for the opportunities which lie ahead of us.

“I am excited about the new chapter which Britain is now writing for itself, and for the opportunities which lie ahead of us”

# Review of the Year

## Covid-19 plunges the UK economy into the deepest recession since World War II

Covid has touched almost every part of the economy, bringing ruin to some and severe difficulty to most.

Government measures to support businesses included the furlough scheme, in which the government pays 80 per cent of a worker's salary during the period in which they can't work.

Loans, tax relief and grants were also available.

In early January, Rishi Sunak, the chancellor of the exchequer, announced another £4.6 billion to support businesses. This took the form of top-up grants to businesses for retail, hospitality and leisure businesses of up to £9,000, and a £594-million discretionary fund to support other businesses.

Mr Sunak said: "The new strain of the virus presents us all with a huge challenge – and whilst the vaccine is being rolled out, we have needed to tighten restrictions further. Today we are announcing a further cash injection to support businesses and jobs until the spring.

"This will help businesses to get through the months ahead – and crucially it will help sustain jobs, so workers can be ready to return when they are able to reopen."

In November, the CBI reported research from its members showing Covid had coincided with a manufacturing demand slump.

Although the pace of the decline in the three months to November had slowed to a fall of only six per cent, the survey of 277 manufacturers found that the pipeline for activity, output projections



The government has borrowed a peacetime record £355 billion since the onset of the pandemic, and expects to borrow a further £234 billion

and order books weakened in October. Companies expected it to fall again until the end of February.

The main decline was in the aerospace manufacturing sub-sector.

The CBI's chief economist, Anna Leach, said: "Firms have done all they can to adapt their operations to the current conditions, but pressure remains intense. The extension of government support – notably the Job Retention Scheme – is very welcome.

"Key to stabilising trading conditions for manufacturing firms will be getting the pandemic under control through further investment in mass testing, ensuring a seamless test and trace system, and an efficient vaccine rollout."

In February, the BBC reported a big rise in redundancies among the young.

In the three months to November, the percentage rate of 25 to 34-year-olds being made redundant hit 16.2 per thousand, five times as much as the figure one year earlier.

Overall unemployment hit 1.72 million, the highest level in five years.





Jeff Bezos, founder of Amazon and the world's richest man

Town centre retail was badly hit as customers fearing the virus stayed away. In July, department store Selfridges said it would be forced to shed 450 jobs. Managing Director Anne Pitcher said in a statement: "Like many others, we are feeling the effects and acknowledge that recovery will be slow, with sales this year forecast to be significantly less than they were in 2019. It will, without doubt, be the toughest year we have experienced in our recent history."

As retail and hospitality jobs were hit by Covid shutdowns, one employer reported 1,000 applicants for a receptionist job.

The government tried to help the hospitality sector in between Covid peaks with the Eat Out to Help Out scheme, which saw half-price meals in August. In November, the *Daily Mail* reported it had cost the country £849 million. It had been budgeted to cost £500 million, and in October, Reuters reported a study from the University of Warwick showing it contributed to the second peak.

Government data showed roughly 80 per cent of hospitality firms stopped trading in April, with 1.4 million workers furloughed, the highest total of any sector.

In August, conciliation service Acas said calls to its redundancy advice line had tripled in June and July.

Chief Executive Susan Clews said: "The economic impact of coronavirus, alongside fears around the furlough scheme tapering off, has left many employers and their staff concerned about their future livelihoods."

The situation gradually improved over the summer with the number of furloughed workers falling from eight million in April to 4.5 million in August.

However, online retail boomed.

Amazon boss Jeff Bezos became, for a time, the richest man in the world as consumers ordered goods direct to their homes.

Apple also saw business increase, and Facebook gained users. In August, Tim Cook, Apple's chief executive, joined the ranks of the world's estimated 2,825 billionaires as the firm's stock, some of which he holds, rose.

By contrast, in January, the Federation of Small Businesses warned that 250,000 smaller companies could go bust this year if they do not get more government support. FSB research from its members said one fifth planned to cut staff numbers and 80 per cent expected to see no improvement before the end of April.

However, January also brought some good news to the sector as the Supreme Court ruled in favour of policyholders and against insurance firms who claimed they were not liable to pay out.

The test case, brought by the Financial Conduct Authority, over business interruption policies was a significant victory for some businesses.

The FCA executive director for consumers and competition,



Many small businesses are still operating at limited capacity or have shut down completely

Sheldon Mills, said: “Coronavirus is causing substantial loss and distress to businesses and many are under immense financial strain to stay afloat. This test case involved complex legal issues. Our aim throughout this test case has been to get clarity for as wide a range of parties as possible, as quickly as possible, and today’s judgment decisively removes many of the roadblocks to claims by policyholders.”

Most small business’s insurance will only cover property damage, but many also had clauses covering diseases and “public access restrictions”, of the kind imposed by the government to stop the spread.

Mr Mills said “potentially” hundreds of thousands of jobs were relying on the judgment and that the FCA would be working with insurers “to ensure they now move quickly to pay claims the judgment says should be paid.”

The director general of the Association of British Insurers, Huw Evans, estimated that the industry expected to pay around £1.8 billion in Covid-related claims.

He said: “Insurers have supported this fast-track legal process every step of

the way and we welcome the clarity that the judgment will bring to a number of complex issues. Today’s judgment represents the final step in the appeal process.

“We recognise this has been a particularly difficult time for many small businesses and naturally regret that Covid-19 restrictions have led to disputes with some customers. We will continue to work together as an industry to ensure customers have the clarity they need when it comes to what they can expect from their business insurance policies.”

The FSB said the ruling was a “big victory” for the sector.

Chair Mike Cherry said: “While this is good news, and while the law has to follow procedure, it’s disappointing that so many small businesses have had to wait to get the money they desperately need under policies they believed were there to protect them, policies they bought in good faith.

“Businesses deserve to be protected in a timely way, but instead they have been failed by their insurers and are now trying to make up for lost time. Providers must now pay-out quickly.”

## The environment



Boris Johnson announces a ten-point green plan creating 250,000 jobs

Despite the long shadow of Covid-19, government and industry made some significant announcements on an ambitious green agenda over the course of the year.

With Joe Biden replacing Donald Trump in the White House in January, the incoming president has already committed to a Green New Deal covering up to \$2 trillion of economic activity. He has also pledged to rejoin the Paris climate accord which Mr Trump took the US out of.

Widespread flooding and wildfires have brought the issue to the forefront of the public's mind over the past year.

This commitment made in 2015 was to hold the global average temperature to below two degrees above pre-industrial levels.

The UK is due to host the UN's annual climate change conference later this year, with Glasgow seeing delegates fly in from all over the world in November 2021.

In November 2020, the prime minister announced a ten-point plan for a "Green Industrial Revolution".

Boris Johnson said it would "mobilise £12 billion of government investment, and potentially three times as much from the private sector, to create and support up to 250,000 green jobs. There will be electric vehicle technicians in the Midlands, construction and installation workers in the North East and Wales, specialists in advanced fuels in the North West, agroforestry practitioners in Scotland, and grid system installers everywhere. And we will help people train for these new green jobs through our Lifetime Skills Guarantee."

The plan includes advances to offshore wind power, pushing the uptake of low-carbon hydrogen technologies, greater energy efficiency plus "delivering new and advanced nuclear power".

Probably the most eye-catching government announcement on this front came in November with a commitment to phase out the sale of new petrol and diesel cars within the next ten years.

In December, a coroner ruled that air pollution was one of the causes of death for a nine-year-old girl who lived near the South Circular Road in south London. The capital has long been in breach of European air quality standards. The ruling was widely reported, and a government adviser on air pollution called it "a landmark decision".

After that, new cars and vans can be sold only if they have the ability to drive "a significant distance" with zero emissions, ie if they are full or plug-in hybrids, although the "significant distance is still to be defined post-consultation.

The announcement sits alongside a promise to spend £1.3 billion



to improve the infrastructure for greener vehicles. This will build on the existing network of charge-points for electric cars in homes and on streets and motorways across the UK. The government estimates a driver is never more than 25 miles from a rapid charge-point along England motorways and “major” A-roads.

Another half-billion pounds are earmarked for grants to incentivise people to switch to low or zero-emission vehicles.

Following legislation, green number plates are also to be introduced to raise awareness of greener vehicles and help local councils set their own local incentives, for example reduced parking charges or free entry into zero-admission areas.

Ministers are hoping that bringing forward the phase-out date will boost employment.

Grant Shapps, the transport secretary, said: “Bringing forward the phase-out date could create 40,000 extra jobs by 2030, particularly in our manufacturing heartlands of the North East and across the Midlands, and will see emissions reductions equivalent to taking more than four million cars off the road.”

Ministers said they hoped the investment would see the UK become a bigger part of the developing supply chain for electric vehicles and their associated infrastructure.

Alok Sharma, the then business secretary said the pledge “will help our automotive industry transition towards electric vehicle production, open up new opportunities to build zero-carbon vehicles right here in the UK, while strengthening regional supply chains with new Gigafactories – creating thousands of new highly skilled jobs.”

The Glasgow conference will also see the launch of a £20-million “clean maritime demonstration competition”



The government plans to spend £1.3 billion to improve the infrastructure for greener vehicles

to help reduce the pollution from this sector.

The sector contributes between two and three per cent of the world’s total greenhouse gas emissions, with 90 per cent of all trade being seaborne.

A further £15 million is being invested in a competition to develop a more sustainable aviation fuel. Aviation is responsible for 12 per cent of total carbon dioxide emissions, and the government is hoping that the competition could help to kick-start the development of industrial plants to manufacture that fuel in the UK. Last year, the BBC reported that one per cent of the world population were responsible for half the aviation emissions, with the Committee on Climate Change arguing a frequent flyer levy would help offset this.

A further £3 million is being invested into research on electric or hydrogen-powered aircraft.

The plans are part of the UK’s commitment to end its contribution to climate change by 2050.

In December, local authorities were asked to bid to host a prototype fusion power plant, with the successful area potentially then at the centre of an important new infrastructure project

which could create thousands of highly skilled jobs.

The fusion power plant will be known as STEP, short for Spherical Tokamak for Energy Production, and if successful would provide low-carbon energy.

Local authorities have until the end of March to apply, and the plant should be complete at the winning site by 2040.

UK Atomic Energy Authority CEO Professor Ian Chapman said: "STEP is about moving from research and development to delivery. It will prove that fusion is not a far-off dream, but a dawning reality with the UK leading the commercial development of fusion

power and positioning itself as a pioneer in sustainable fusion energy.

"To achieve this ambitious goal will require all the ingenuity and application of the UK's science and engineering industry and we look forward to working with industrial partners in the years ahead, not just to invest, but also to support the technical evolution of the programme."

The quarter-billion commitment to the STEP programme comes on top of an existing promise to invest £184 million in new fusion facilities and apprenticeships at the Culham Science Centre in Oxfordshire up to the end of 2025.

## New Governor appointed at the Bank of England



Andrew Bailey was announced as the new Governor of the Bank of England in March 2020

In December 2019, the new governor of the Bank of England was announced.

Andrew Bailey took up the role in March to replace the outgoing Mark Carney, who had been in post since 2012.

Bailey took up the role after running the Financial Conduct Authority for

four years, working at the BoE for 12 years in different roles before that.

Other contenders for the top job were thought to include fellow BoE veterans Andrew Haldane and Nemat Shafique, as well as Santander UK Chair Shriti Vadera and Ofcom Chief Executive Sharon White.

Bailey's appointment to the top job at Threadneedle Street was welcomed by the Confederation of British Industry. Chief Economist Rain Newton-Smith said: "[Bailey's] strong experience, both in Threadneedle Street and at the Financial Conduct Authority, means he is particularly well placed to steer the British economy through the new course it will take after Brexit, and through challenging global economic times."

Last month, Mr Bailey warned that a no-deal Brexit would do more damage to the UK economy than Covid-19. The same month he backed the decision of Mr Sunak, chancellor of the exchequer, to keep spending billions of pounds on Covid relief.

*Reuters* reported his comments to a local BBC radio station that it was “Absolutely sensible that public resources, resources of the state, are being used to cushion the huge impact of this absolutely unprecedented shock.

“We are smoothing the impact over a number of years to come, and that is the right thing to do.”

He addressed the BoE’s connection to another major news story of 2020 in a seminar on economic history hosted by King’s College London in December, saying the bank should not ignore the links some of its early governors had with the slave trade.

He told delegates the Black Lives Matter protests had prompted the bank to take a closer look at its 326-year history and that it had “[shone] a light on parts of our history that we don’t celebrate.”

He added: “While we have no time for the so-called values of the past

that condoned slavery and the slave trade, our institutional standing as the Bank of England benefits in some part at least from the continuity of our existence.”

The bank said in June it would take down any portraits of governors or directors that were directly involved in the slave trade.

In September, the BoE said it was exploring the practicalities of negative interest rates, but since then, Bailey and other policy figures have been playing that possibility down.

In December, it appeared that investors had largely backed off from bets that the UK would go to negative interest rates.

The *Financial Times* said the additional £150 billion of bond purchases in November made clear that quantitative easing was still the preferred policy for stimulating the economy over the short term.

## Britain leaves the European Union

A line of sorts was drawn under the Brexit saga on January 1, 2021, as Britain formally left the EU, after a deal was agreed with Europe and ratified by parliament on December 30.

Boris Johnson, the prime minister, said in a statement at the announcement of the deal on Christmas Eve: “From Jan 1 we are outside the customs union, and outside the single market. British laws will be made solely by the British Parliament. Interpreted by UK judges sitting in UK courts. And the jurisdiction of the European Court of Justice will come to an end.

“We will be able to set our own standards, to innovate in the way that we want, to originate new frameworks for the sectors in which this country leads the world, from biosciences to



Brexit finally became a reality as Britain left the EU following a 48-year partnership

financial services, artificial intelligence and beyond.”

The news marked the formal end of the process that many parts of British business had found exasperating since



the announcement of the referendum result in 2016.

The Institute of Directors said business leaders would consider it a “Christmas gift better late than never.”

Director General Jonathan Geldart said: “A deal can draw a line under what has been a tumultuous few years for companies. It provides a stable basis for the future relationship with our biggest market, and directors are eager to sift through the detail to understand what may change. The devil will be in the detail, but at least they can now put the political prevarication behind them and start to prepare properly.”

The institute also pressed the government to give fiscal support to small businesses “frantically” trying to navigate the new rules.

Allie Renison, senior policy adviser, said: “The absence of a genuine implementation period means businesses have an enormous task to adjust rapidly to Brexit proper. With the end of transition now upon us it is beyond critical that Government step up to the plate to help the effort.”

In January, the BBC reported tens of thousands of pounds in fines had been issued to lorry drivers who do not have the “Kent Access Permit”, which has been required since the start of the year.

Later that month, car manufacturer Nissan confirmed it would keep its Sunderland plant open for the long term, as it was satisfied with the deal. It had last year warned it might have to leave if no deal was agreed.

## The state of competition in the UK



Former Chancellor Sajid Javid launched a review into the effectiveness of competition in the British economy

The UK economy may have got less competitive over the past 20 years, to the detriment of the consumer, the Competition and Markets Authority said in November.

One of the conclusions of the first-ever report into the state of competition across Britain was that the effects of the 2008 recession were still being

felt in a business sector that was less competitive than it was at the end of the last century.

The report had been commissioned in February by Sajid Javid, who was chancellor at the time, and Andrea Leadsom, then business secretary. Their letter to CMA Chief Executive Andrea Coscelli said: “Ensuring competition is working effectively right across the country is at the heart of this government’s vision for the economy.

“This has come into sharp focus in recent international academic and policy debates where a number of studies have suggested that competitive pressure across advanced economies, including the UK, could be weakening.”

The CMA’s report, delayed two months because of Covid-19, considered the whole economy as well as individual industries and looked at entry and exit rates, consumer experience, profitability and market concentration.



The CMA report suggested that competition across the economy as a whole may have declined over the last 20 years

It found that nationally, although the position had improved slightly since 2010, concentration was still three per cent higher than it had been in 1998.

The report found that “Among the most profitable companies in the economy, profits and mark-ups appear to be rising. The firms that already had the largest mark-ups saw their mark-ups increase by nine per cent over the last 20 years.”

The average increase in mark-up was seven per cent over the same period.

The findings also drew on research showing one in three UK customers had experienced a consumer problem in one market or another, the highest in the EU, where the average is 22 per cent.

Telecommunications, mobile, utilities and property services were the worst

performers on satisfaction and trust. Although Britain scores well in ability to switch provider in some markets, this is less common for those on lower incomes.

CMA Chief Economic Adviser Mike Walker said: “Our findings suggest a need for vigilance – by the CMA and by government – to ensure competition is not weakened because of the effects of coronavirus.”

In October, Dr Coscelli called for a digital markets regulatory regime after the authority’s research found that the significant market power of some of the big online firms constituted an “existential threat” to competition in digital markets.

In a speech in New York, he also said competition authorities globally had to work together to share intelligence and tackle abuses.



# Pragnell



Stratford-upon-Avon showroom

**P**ragnell is a small, family jeweller and one of the UK's finest independent purveyors of high-quality jewellery and watches. Its clients include British and European royalty, Middle Eastern sheikhs and internationally renowned business leaders, musicians and artists. Below, Chairman Charlie Pragnell explains more.

We manufacture our own jewellery, ranging from small gifts for a few hundred pounds to seven-figure, investment-grade pieces. We offer a fine selection of antique and period jewellery and Swiss watches, including Rolex and Patek Philippe. There are very few companies that equal the diversity and depth of our watch and jewellery offering. In a family-owned business there is an innate commitment to quality.

My grandfather, George Pragnell, trained as a gemmologist at Biggs of Maidenhead (where he looked after Queen Mary) and then took over a jewellery shop in a listed Tudor cottage in Stratford-upon-Avon in 1954, and founded George Pragnell Ltd. I am the third generation to run this business, taking the reins from my father, Jeremy, in 2010. My mother's family, Blott, founded jewellery manufacturer Waters & Blott in 1850, so in this sense we are a sixth-generation jeweller.

## Art, not fashion

True jewellery embodies unique emotions and memories. It is art, not fashion. Our finest creations are one-of-a-kind jewels, designed and crafted around extraordinary, unique gemstones, each one selected by a family member. Every masterpiece is individually numbered and finished with the Pragnell Seal, which guarantees that it is an original design and was handmade in Great Britain.

## FACTS ABOUT PRAGNELL

- » Chairman & CEO: Charlie Pragnell
- » George Pragnell Ltd established in 1954
- » Waters & Blott Ltd established in 1850
- » Based in Stratford-upon-Avon
- » Services: Sourcing, servicing and valuation of fine jewellery and watches
- » No. of employees: 106
- » Presented with the Queen's Award for Enterprise
- » [www.pragnell.co.uk](http://www.pragnell.co.uk)

“Our finest creations are one-of-a-kind jewels, designed and crafted around extraordinary, unique gemstones, each one selected by a family member”

### Handmade in Great Britain

We have our own jewellery workshop in Leicestershire, with four in-house goldsmiths and two designers. We work with a handful of specialist workshops in Europe, but the majority of our jewellery is made entirely in our British workshops, so that we have complete control over the process and quality. Better results are achieved when a designer can work alongside a goldsmith and evolve the piece while it is being made.

We embrace the newest technology, which enhances a depth of experience in traditional craftsmanship.

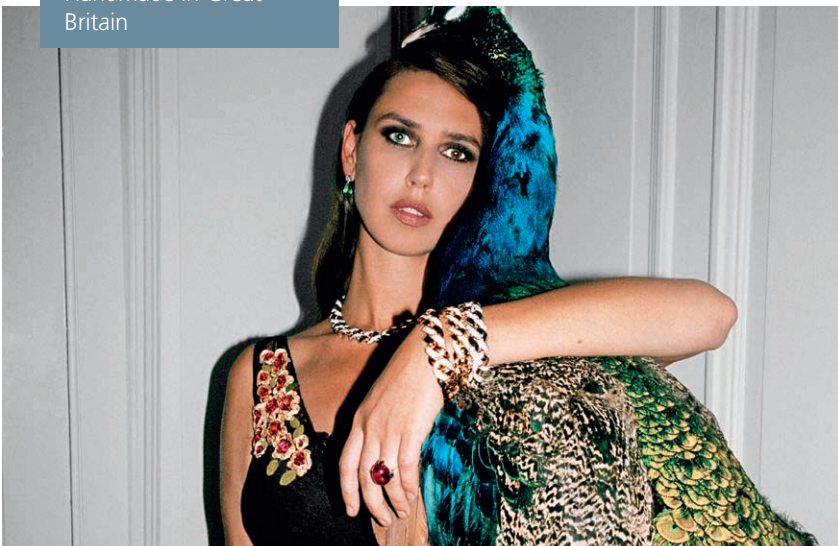
### Our knowledge is your safeguard

My grandfather's first advertising slogan was "our knowledge is your safeguard", and that still rings true. We have always built expertise within the company and have 12 qualified gemmologists, 19 high-complication watch specialists, five antique jewellery specialists and a highly-qualified watch-servicing workshop.

Many of our specialists have been with the company for 30 or 40 years.

Every new recruit knows exactly what their first two years will look like and how they will be trained. Each employee undergoes training every year, whatever their area of expertise.

Handmade in Great Britain



Our philosophy allows people to do what they do well more often, so that they enjoy their job, do it better and are more productive. We have a very high employee retention rate and I believe our training scheme is a big part of that.

We recruit for diversity in terms of age, gender, faith and background, because this reflects the diversity of our customers. There are 18 different languages spoken fluently throughout our staff. Some employees have been with the business for longer than I have been alive, and they tell me that one of the reasons they've stayed is that we encourage evolution, not revolution.

### Building an international brand

Our growth has been driven by reinvesting profits into our stock, our team and our showrooms. We opened a store on Mount Street, Mayfair, in November 2017, which has started well, largely as a result of providing a highly-personal style of customer service.

Our headquarters in Stratford-upon-Avon is still our largest location and attracts visitors from around the world.

In 1991, my father expanded my grandparents' original shop at number five Wood Street into number six, and in 2019 we extended into number seven, doubling the size of the store. The next step is digital expansion and last summer we launched our ecommerce platform. The world is making a seismic step in digital innovation, and we see our website as our fourth location and one with international potential.

### A level playing field please

Developing a strong, long-term business both domestically and internationally requires a fair playing field at home.

Of particular concern is the increasing value of undeclared goods brought back into the UK, which have been purchased by departing UK domiciled customers in airport duty-free shops.

This leads to a significant loss of VAT revenue for the Treasury and results in unfair competition for UK retailers. The government and HMRC must take action to ensure that this is corrected.

Equally, many US digital giants benefit from extensive use of UK infrastructure, which was funded by hardworking UK citizens and businesses. These foreign companies contribute negligible amounts to the UK Treasury, export vast profits and simultaneously put longstanding UK companies, which have made significant tax contributions, out of business. This omission is increasingly creating an unfair competitive advantage and an imbalance between social contribution and benefit.

However, the more imminent threat facing retail and the wider economy is the withdrawal of VAT-free sales for non-EU visitors to the UK, effective from January. This will disadvantage UK retailers immediately and considerably. Other European destinations will still offer VAT refunds to these customers. Many UK companies owned by international brands will simply stop trading in the UK, as non-EU customers will buy from their shops in other European destinations. This will mean that large parts of premium London and other premium UK towns with high visitor numbers will have many empty shops. As the existing retail crisis shows, empty shops lead to a decline in commercial property value and a loss of the 'halo' effect - fewer high-quality hotels, restaurants and entertainment venues. In turn, this affects employment, residential property prices and economic wealth. A free market economy, national or local, is a highly-complex and fragile ecosystem which evolves naturally.

With our exit from the EU, the necessary support measures are needed to ensure all UK businesses remain competitive both domestically and internationally, which in turn will profit and benefit our domestic economy as a whole.



Building an international brand: our finest creations

## Philanthropy

Traceability is becoming more important in the jewellery industry, so an increasing proportion of our stones are traceable to specific mines. Botswana is an example where profits from the diamond industry have hugely benefited the local population. In 2020 we partnered with Sentebale, the charity co-founded by Prince Harry. We auctioned a one-of-a-kind Botswanan diamond ring, with all proceeds benefiting HIV-positive people in Botswana and Lesotho, and continue to work with them closely.

In 1990 my father introduced the Pragnell Shakespeare Birthday Award, which celebrates those who have spent their life furthering the understanding and awareness of Shakespeare's work. We support the Royal Shakespeare Company, the Royal Shakespeare Trust and the Shakespeare Hospice, and play a key role in the organisation of Shakespeare's birthday celebrations. We also support the Oxford Children's Hospital, the Royal British Legion, the British Red Cross, Marie Curie, Macmillan and JDRF. In 2017 Pragnell became a patron of the Prince's Trust, actively supporting its superb apprenticeship programme.

Our persistent quest for perfection bears the fruit which allows us to choose the nature of our contribution and direction. There are many family companies like ours that function this way and despite the current challenges, I am convinced that our great nation remains well equipped to flourish.

“In 2017 Pragnell became a patron of the Prince's Trust, actively supporting its superb apprenticeship programme”



# Aico



National Sales Manager  
Steve Trafford



Aico headquarters

## FACTS ABOUT AICO

- » National Sales Manager: Steve Trafford
- » Established in 1990
- » Based in Oswestry, Shropshire
- » Services: Domestic fire and carbon monoxide protection
- » No. of employees: 68
- » [www.aico.co.uk](http://www.aico.co.uk)

Aico is the UK market leader in domestic fire and carbon monoxide protection. Throughout its history, it has led the way in providing innovative solutions and achieved numerous industry firsts in fire and carbon monoxide life safety products. Aico's ethos, which is focused on education, quality, service and innovation, has provided the foundation for continued growth and the delivery of safer homes in a turbulent and challenging environment. National Sales Manager Steve Trafford tells the *Review* more about the workings of the company.

In addition to supplying high-quality alarms, of which we supplied 4.5 million in 2019, our ethos led to the 2009 launch of our complementary training initiative for professionals within the fire, gas, electrical and compliance industries to facilitate learning and a more unified approach. This modular training scheme has now developed and expanded into a CPD-accredited training programme encompassing legislation, regulations and technological advancements to facilitate the sharing of best practice within the aforementioned industries. Our training scheme is being further expanded with the incorporation of an online community-based platform encouraging learning, development and networking between professionals, to discuss and provide solutions to pertinent issues.

## The approach to fire protection is changing

New legislation and regulatory updates have had considerable impact upon our operations, primarily the 2019 amendment to the Housing (Scotland) Act 1987. This change in legislation in Scotland has come in direct response to issues raised



in matters of fire protection, with a proposed two-year time constraint and requirement for all properties to have an interconnected fire alarm system.

The alarm system will comply if interconnected wirelessly or via traditional cabling methods and can comprise either mains-powered or battery-powered alarms, providing they have a long-life, tamper-proof battery. The legislative requirements now stipulate that every property in Scotland, whether socially or privately owned, must have adequate fire protection: smoke alarms on each storey and in the principal habitable room, and heat alarms installed in kitchens. In making this landmark change to the Housing (Scotland) Act 1987, Scotland are leading the way in creating safer communities and providing a benchmark for the rest of the UK to follow.

The wireless interconnection of alarms is enabling landlords and social housing providers to make urgent improvements in their properties at pace and with minimal disruption to tenants. Wireless interconnection between alarms is a feature that we have pioneered with our patented RadioLINK technology.

First launched in 2003, this technology provided the foundation and acted as a catalyst for the development of our radio frequency technology, by moving beyond interconnection and bringing data to the forefront. Our alarm system management tool the SmartLINK Gateway, which is the latest advancement in this technology, addresses some of the recent concerns regarding fire protection, in particular facilitating the integration of alarm system data across housing stock.

The revision to the British Standard BS 5839-6 has also been a positive change and one of noteworthy impact. The revised BS 5839-6:2019 laid out amendments to best practice in fire alarm requirements across properties and revised gradings to alarms



The Resident Safety Campaign launch at CIH Housing Manchester

themselves, both mains powered and battery powered.

These new recommendations detail that in some circumstances, such as houses of multiple occupancy and rented housing, properties should now be equipped with mains-powered fire alarms that have a long-life, tamper-proof battery back-up as opposed to a user-replaceable battery back-up, which was sufficient previously. The revision also states that the level of protection in rented housing should be increased to cover kitchens and the principal habitable room.

### Resident safety and challenging the status quo

When discussing challenges within our industry and with recurring themes of risk ownership and the golden thread of business information management, questions are being asked and debated around all forms of fire protection and the associated building management. As was pervasive within the Hackitt Review, the need to treat buildings as complete and coherent systems is clear. Therefore, the need to have a platform on which to discuss this and find a way forward is vital. As a result, we took action and worked on linking a vast network of knowledge, with the common thread of tenant safety

“As was pervasive within the Hackitt Review, the need to treat buildings as complete and coherent systems is clear”



The Resident Safety Campaign aims to increase awareness, promote best practice and share practical advice



An Aico Expert Installer trained professional installing a Multi-Sensor alarm



The flagship 3000 Series with alarm system management tool the SmartLINK Gateway

“There is a clear requirement for the legislative reform implemented in Scotland to be echoed in the rest of the UK”

at its core, under the umbrella of the Resident Safety Campaign, which came at a febrile time for social landlords – who are Aico’s main stakeholders.

With widely publicised concerns about safety, trust between landlords and tenants is at an all-time low, but communication between the two has never been more important. It is also a political priority: in the government’s recent Social Housing Green Paper, better communications on matters of safety was a primary issue. It was hoped that the campaign could reach both landlords and tenants, with the challenge being to start the conversation and also encourage solutions, against a changing backdrop of ongoing investigations and government policy.

### Legislative reform

Currently in England and Wales, requirements surrounding carbon monoxide are outlined in building regulations that stipulate that where a new or replacement fixed solid fuel-burning appliance is installed, a carbon monoxide alarm should also be fitted. This specificity of ‘solid fuel’ is lacking in terms of the applications to gas appliances, whereas the British Standard BS EN 50292 recommends that any fuel-burning appliance should

be covered by a carbon monoxide alarm, although this is recommended best practice and not legislative.

This demonstrates the incoherence in requirements for carbon monoxide protection. The amendment to the Housing (Scotland) Act 1987 encompasses carbon monoxide protection in the provisions set out in the legislative reform, stating that a carbon monoxide alarm must be fitted in any room with a fuel-burning appliance. This is an exemplary move in bringing carbon monoxide awareness to the fore and aligning the requirements of building regulations and BS EN 50292 with legislation.

Looking to the future, there is a clear requirement for the legislative reform implemented in Scotland to be echoed in the rest of the UK in order to more closely follow the recommendations of the British Standards, because, as highlighted, there is significant room for improvement in both fire and carbon monoxide protection. We will strive to continue to be the market leader in home life safety, pioneering new technologies to cater for advancements in the connected home, promote best practice and ultimately deliver safer communities.

# Gawith Hoggarth



Original Navy Flake packaging found in the original Samuel Gawith 'Brown House' factory



Director Chris Gawith

Gawith Hoggarth have been producing high-quality tobacco products since the 18th century. From their early days of producing snuff, used as a staple down the mines, in more recent times the business has been forced to adapt to consumer demands and government constraints to become the last standing manufacturer of smoking tobacco in the UK. A family business based in Kendal, Cumbria, the Gawith family have been producing luxury tobacco for over 220 years. Directors Chris and Irene Gawith tell the *Review* more.

"We are the only" is a claim that very few businesses have the pleasure of boasting about – especially so when the odds are very much not in your favour. In spite of the challenges we have faced, it feels like our business has a certain place in the world, having witnessed history and faced all the challenges associated with the political and social economics of the past two centuries.

## A family business with a difference

Despite the constant challenges passed down to our business one statute at a time, Gawith Hoggarth produces tobacco like most have never seen before. Thick blankets of pipe tobacco are scrutinised by our master blender for stalks and imperfections as it flows off conveyors. In the Twist room, highly skilled staff create lengths of tobacco rope, one leaf at a time, which is knotted into a ball

### FACTS ABOUT GAWITH HOGGARTH

- » Directors: Irene Gawith and Chris Gawith
- » Founded in 1792
- » Based in Kendal, Cumbria
- » Services: Manufacture of tobacco products
- » No. of employees: 35
- » [www.gawithhoggarth.co.uk](http://www.gawithhoggarth.co.uk)



“Gawith  
Hoggarth  
produces  
tobacco like  
most have  
never seen  
before”

that would not look out of place in any living room. Even non-smokers who experience the sweet aroma of unburnt tobacco and witness the weird and wonderful forms our products exhibit tend to leave with a renewed understanding of smoking for pleasure. Our company is not in the business of providing a ‘nicotine fix’, but rather a smoking pleasure akin to the enjoyment of fine whisky or indeed a Cuban cigar.

### Expectedly difficult times in the tobacco industry

With the introduction of new EU legislation and a diminishing public opinion of tobacco around the globe, this isn’t an industry that retains the sophistication of other socially problematic industries such as alcohol. In many ways, the tobacco industry has become a scapegoat for the electorate’s addictive personality. While the pipe-smoker sits quietly enjoying the ambience of a bowl of Cherry Vanilla, large swathes of the population are destined for A&E having

consumed cheap alcohol to excess. It is hard to dispute the disproportionality between tobacco and alcohol in terms of socio-economics. Yet somehow it feels unrealistic to suggest that governments will ever play fair on the rules surrounding addictive substances such as tobacco and alcohol. Even more surprising is the continual relaxation of cannabis laws around the world in the face of tighter controls on tobacco. Or is this simply proof that the fashion of public opinion, coupled with excise duties, overshadow political and economic common sense?

For a traditional, small company such as Gawith Hoggarth, the extra restrictions on tobacco production and movement specified in the Tobacco Products Directive (2019) impose an additional £350,000 of operating costs. This is a cost that will certainly contribute to the collapse of many small tobacco businesses across Europe in 2024, upon full implementation of this specific directive. Much of this cost is born from the limitations of existing logistics companies for which the complexity of this legislation outweighs

Ball of twist tobacco



Flake tobacco





Hessian sacks of Latakia tobacco leaf grown in Cyprus



Original packaging of Samuel Gawith products

any commercial reasoning. But when business is faced with a challenge, it must look for the advantage. Gawith Hoggarth is determined to do exactly this and continue to face up to the challenges – as it has done for over 250 years.

The challenge of Covid-19 has been no exception. Plans that had been in the pipeline for systems development have been dropped and, instead, implemented within weeks, not months. The need for better ways of working have become necessity and not desire. The belief that 'what doesn't kill us makes us stronger' has never been as striking as it is right now, and this is surely a salute to all small businesses that feel they have gone to war during 2020. It is with great pride I can say Gawith Hoggarth has weathered the storm incredibly well and stands with so many small businesses who have shown that agility and resilience are fundamental to the future of the economy.

## Continuing to thrive

So where does a small business in an unpopular and declining industry go next? The answer is in the untapped resource of legacy. Most companies of any size would sell their souls for over two centuries of traditional manufacturing techniques in any country. The fact that Gawith Hoggarth can stand proudly next to the Union Jack creates the perfect springboard to the rest of the world.

With the more traditional products gaining momentum in China and the USA, and increasing interest from around the globe, it feels like the sky is the limit for the potential of this small business. With initial order quantities of almost 20 tonnes to China alone without any real commercial effort, the focus must now turn away from the UK's domestic situation and to the potential of supplying the markets that continue to crave the quality and tradition of Best of British.

“Our company is not in the business of providing a 'nicotine fix', but rather a smoking pleasure akin to the enjoyment of fine whisky”



# Shackleton Wintle & Lane Ltd



Chief Executive John Rogers



A proud history of reliable service for over four decades

Founded in 1978, Shackleton Wintle & Lane (SW&L Ltd) is one of the largest and most respected plumbing and heating businesses in the southwest of England. The company has more than 100 direct employees and supports a further 50 subcontractors across Gloucestershire, Worcestershire and Monmouthshire. With the company holding seven accreditations as a testament to its professionalism and established nature, Managing Director Simon Marklew explains more.

## FACTS ABOUT SHACKLETON WINTLE & LANE LTD

- » Chief Executive: John Rogers
- » Managing Director: Simon Marklew
- » Established in 1978
- » Based in Cheltenham
- » Services: Plumbing, heating and electrical services
- » No. of employees: More than 100
- » Proud sponsors of Cheltenham Town FC
- » [www.sw-l.co.uk](http://www.sw-l.co.uk)

In 2018, Shackleton & Wintle Ltd delivered its strategy for rapid growth by taking the bold decision to review our proposition to the market and include an electrical division. We had identified the perfect business to deliver our ambition of widening our offer to a fully integrated service with a complete mechanical and electrical package. WJL Electrical was one of Cheltenham's up-and-coming businesses in the area, with excellent reputation and values that were shared by both businesses. In 2018 the joint company was reborn and became SW&L Ltd.

Together the combined business has been able to meet and exceed the diverse needs of its varied customer base, including national housebuilders, housing associations, multiple property landlords and individual homeowners. SW&L trades across all parts of the industry, with the installation of plumbing, heating, electrical and renewable energy products.

Our installation of plumbing, heating and drainage into new properties built by national developers totals approximately 1,250 units per year. Our flexibility, reliability and ability to work with other trades ensure that sites are delivered on time and within safe working practices. We offer a full design package for tailored plumbing, heating and electrical installations to all sectors.



Working across the Cotswolds and Gloucestershire, we meet the particular complex and individual needs of small, traditional developers as well as carrying out the refurbishment of private homes. We also work in partnership with the estates of stately homes and some properties dating back to the 16th century. We also offer maintenance and aftercare services covering housing associations, private landlords and letting agencies.

### The values at our core

Our company thrives on team-based culture, and as a business we are next-generation ready. Our core values are built around the following principles.

- » Teamwork: An inclusive environment where specialists working in tandem deliver a common goal.
- » Ambition: Creating and sharing the vision and direction for the business.
- » Commitment: Retaining and building on our integrity to become a trusted partner for our customers.
- » Customers: A commitment to deliver service and value which is always best in class.
- » Respect: Recognising and valuing the diversity across our team.
- » Integrity: Upholding our values consistently and without compromise.

### Recent growth

Our growth year on year reached 24 per cent from 2018 to 2019. This was delivered through individual sectors such as new build. This market sector has been very positive for the company, with the demand for new-build completions unexpectedly exceeding all expectations. Additional business has been awarded to SW&L predominantly as a result of our service and the quality of work we offer. Additional organic growth has

come from our bespoke and electrical departments during this period.

Following the merging of our plumbing/heating business with our electrical division, our business has not looked back. The integration of these businesses has delivered excellent benefits to our customers and efficiencies within our group. Consequently, we have delivered our growth ambition solely from the strength of our existing customer partnerships. This in turn forms a robust foundation for future growth across the wider market.

### An unprecedented year

Like virtually all businesses in the UK, 2020 was affected by the sharp downturn in economic activity caused by the Covid-19 pandemic. Our immediate response was to empower and equip our in-house health and safety officer to ensure the safe working of staff and subcontractors on site. Like many businesses, we could not avoid redundancies. However, by working compliantly in accordance with government direction, we could offer our services to both national and regional housebuilders to complete sites which had been left unfinished by other contractors. We welcomed this, as the build programmes have been buoyant and the reduction in



Managing Director  
Simon Marklew

“Able to meet and exceed the diverse needs of its varied customer base”

Working with the installation of plumbing, heating, electrical and renewable energy products





Leading the way in the design and installation of renewable energy systems

## “Creating and sharing the vision and direction for the business”

stamp duty has assisted sales growth, which in turn has assisted with maintaining continuous construction on all sites. As well as consolidating our excellent reputation, this allowed a return to pre-Covid levels of turnover within ten weeks of lockdown and a return to year-on-year growth within three months.

We undertake individual large-scale projects, predominantly national new-build homes. These may range from £350,000 up to £1.4m in value to our business. We carry out bespoke design as well as installation of large mechanical, electrical and renewable energy systems for individual properties. We recently successfully delivered our M&E package on a commissioned £20m property within our local area.

Labour is our biggest challenge and it continues to test us. We successfully partner with GLOSCOL as a big promoter of the apprentice schemes in the local area, and we currently employ 21 apprentices. We look forward to employing a further ten during the course of 2021. However, the challenge we face involves making apprenticeships within the building industry attractive to younger generations. Despite progress, negative perceptions around the image of apprenticeships remain stubbornly difficult to change. Further work is needed across the industry to ensure

that apprenticeships deliver relevant and transferable skills.

The closing of the Feed-in Tariffs scheme in March 2019 has significantly reduced the incentive for microgeneration. As expected, this in turn has adversely affected growth in the market for manufacture and installation of photovoltaic products. The impact on wider environmental ambitions and commitments cannot be overlooked. Many think it will set the UK's transition to renewable power back and the decision was met by widespread criticism from the renewables sector. The closing of the FiT scheme has also exacerbated skills shortages within the renewable sector. According to the Global Energy Talent Index from 2017, 80 per cent of hiring managers highlight skills shortages as a key challenge in the renewable energy industry.

### What we look for in the future

We look forward to an end to the market uncertainty and loss of confidence that has resulted from Brexit. Key parts of our supply chain involve products imported from the EU, and our business needs a greater degree of certainty around movement of goods and exchange rates. With the government having dropped its national target of three million apprenticeships, we would also like to see a renewed commitment to the retention of quality apprenticeship schemes. This should be alongside incentives targeted within key industries to avoid future skills shortages.

In uncertain economic times, the retention of the government's Help to Buy scheme will continue to reinvigorate the market for new homes in the UK. The trickle-down effect of a strong market for new and affordable housing will serve to consolidate and strengthen our market, and support our business for years to come.

Working with innovative solutions to deliver a full design package





# Unimaq



Eight colour 2,100 cans per minute can decorator



Director Berty De Jong

Unimaq is a specialised engineering company that built its reputation on the development and manufacture of machines that are able to print beverage cans in eight colours at speeds in excess of 2,100 cans per minute. The company operates at the highest level of equipment design and innovative process engineering. Approximately 97 per cent of its products are shipped and commissioned overseas. Director Berty De Jong explains in more detail how Unimaq operates.

By listening to our customers and supporting them with their demand and growth, we have been able to grow significantly from humble beginnings, when we worked out of a 20-foot rented sea container, to a business with a turnover of £5 million. In 2000, we chose Wrexham in north Wales as our location because of its can making and engineering resources.

## Adapting and thriving

Many challenges have been presented to us over the last 20 years. When, in 2003, a new German government unexpectedly introduced refunds on cans, the whole can-production process came to a stop, since there was no infrastructure for the refund. As a result, we had no orders for six months. With money saved from previous years and rigorous cost reduction, together with picking up a good machine order for Brazil, 2003 became our best financial year to date.

With Europe coming to terms with the refund between 2005 and 2006, it went through a growth period, during which we accepted more orders than previously. This meant we moved to larger premises and hired more engineers, which was positive but

### FACTS ABOUT UNIMAQ

- » Director: Berty De Jong
- » Established in 1993
- » Based in Wrexham, north Wales
- » Services: Design and manufacturing of specialised machinery for the drinks can industry
- » No. of employees: 26
- » Export sales accounts for 97 per cent of the company's revenues
- » [www.unimaq.co.uk](http://www.unimaq.co.uk)



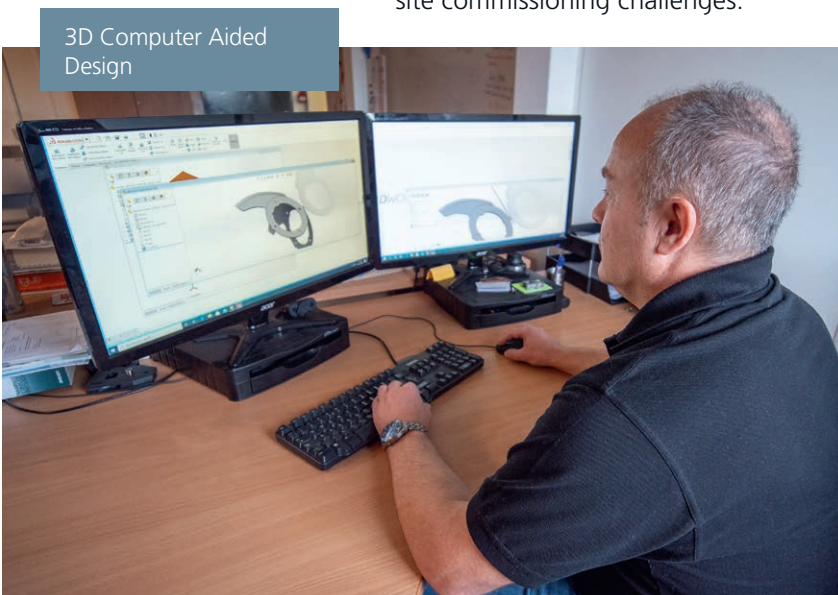


Machine assembly and testing

“Unimaq became known for a can-do reputation in the can drinks industry”

presented a challenge. Looking back, the financial grant support received at the time has been instrumental in allowing us to make this step forward.

Right at the height of the 2008 financial crisis, we were awarded a significant machine order that almost doubled our turnover. More engineers and office staff were hired, and the end destination for this order was only revealed four months into the project. The destination was Baghdad at the height of the war – another challenge that we had not faced before. As one of our mottos is to support the can industry worldwide, we remained fully committed to this project and delivered on it successfully. I can assure you this was not without its financial and on-site commissioning challenges.



3D Computer Aided Design

Because of this, Unimaq became known for a can-do reputation in the can drinks industry. In the period between 2010 and 2013, there was strong growth in the can industry in China and the rest of Asia. This meant hiring and training more people and once again finding larger premises, while also communicating with customers in different time zones and with big cultural differences.

When the beverage can market faced overcapacity in 2015 and 2016, we were challenged once more. We had invested in systems and people and built a team to deliver ten of these machines per year. In 2015 we sold none, and so to save the business, costs had to be reduced, which resulted in a reduction of our workforce by 45 per cent. To save the company and make that guarantee for the remaining people, there was no other choice but to make redundancies. This was a very sad and difficult period, as we were not able to guarantee income for almost half of our team members and their families.

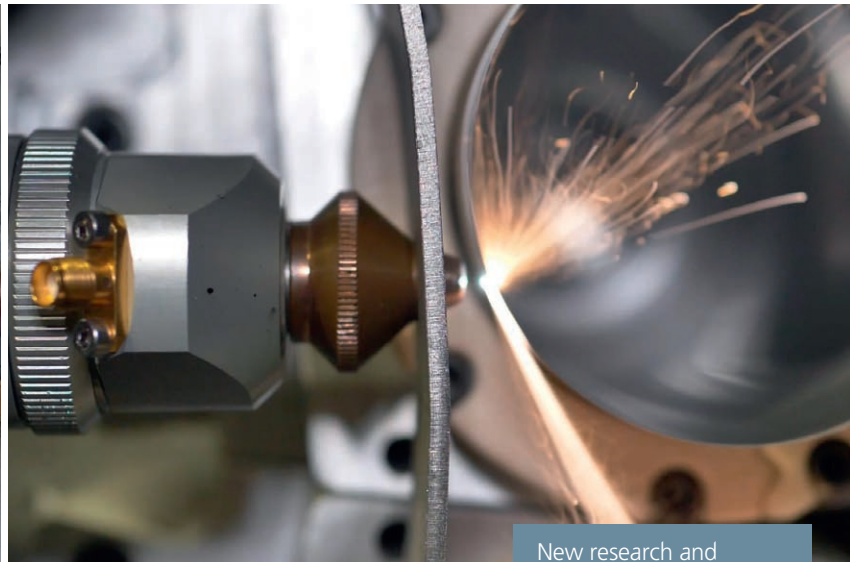
### Rebuilding and growing

From 2016, we were able to build up again with our remaining team. We hired new people with different skills, and by 2018 we were back to our previous level and had reached the same amount of turnover with only 65 per cent of the previous team.

Since 2016 the beverage can business and our customers have been changing. Mergers and acquisitions between the can makers have created more focus and competition. We are also facing more competition from other machine manufacturers entering the market. Once more, this asks us to understand what the industry needs and makes us think about developing new equipment, machines and services which will benefit our customers.



Turnkey system for coating the bottom of a beverage can at 4,000 cans per minute



New research and development of can trimming at 600 per minute using industrial lasers

We put a lot of effort and resources into research and development using new technologies such as industrial lasers and ultraviolet LED lights. We are working with technology partners and local and national universities to support us in finding technical solutions for the technical challenges we are facing. It is exciting to see what is possible for us as a machine manufacturer in collaboration with academics, often partially funded by grants. Finding solutions will undoubtedly present opportunities for Unimaq to commercialise new machines and systems.

The global market volume for beverage cans was estimated at 361 billion cans in 2017, of which 9.5 billion were produced in the UK. The global volume is projected to grow to 430 billion cans in 2021. The drinks can market in the UK and European Union is expected to grow at a compound annual growth rate of over four per cent between 2017 and 2025, owing to increased recycling activities undertaken by the UK and European Commission. Such trends present opportunities for market leaders, such as Unimaq as a principal UK exporter, and encourage investment in research and development within the industry.

## Building a sustainable future

With the negative environmental impact of plastic bottles, and the introduction of specialist beers and new, mostly alcohol-free beverages, there is increased demand for aluminium drinks cans. With more than 80 per cent of all the aluminium that has ever been mined still in use today, this infinitely recyclable material is friendly for our earth. This creates opportunities for the drinks can industry, which we are part of. There is an additional focus on reducing the cost of can production, to further reduce our industry's carbon footprint. This is a primary concern for our customers and the worldwide industry. In addition, we are now challenged by both Covid-19 and Brexit. As a business and team of people, we need to react to these swiftly while solving our technical challenges.

Over the course of my 20 years developing Unimaq, I have tried to show that challenges are around us all the time. Recently, these seem to have become more severe and frequent. We need to analyse these in detail, believe in what we do, and change in order to create new opportunities for our businesses and the people dependent on them.

“We put a lot of effort and resources into research and development using new technologies such as industrial lasers and ultraviolet LED lights”



# Driver Require



CEO Kieran Smith



**D**river Require is an independent, specialist commercial driver recruitment agency. Established in 2000, it follows a simple philosophy based on trust, professionalism and uncompromising customer service. It owns an extensive branch network from the south coast to the Midlands, providing both temporary and permanent drivers to a range of industries, 24 hours a day, 365 days a year. CEO Kieran Smith explains more.

## FACTS ABOUT DRIVER REQUIRE

- » CEO Kieran Smith
- » Established in 2000
- » Located in Stevenage, with six regional branches
- » Services: Specialist driver recruitment agency
- » No. of employees: 35
- » [www.driverrequire.co.uk](http://www.driverrequire.co.uk)

Since we opened our doors, our focus has exclusively been on matching professional, commercial drivers to the clients who need them. We operate on a simple philosophy rooted in our core values of excellence and integrity. We've built a track record of standing by these values and a reputation that is not just about putting drivers in trucks, but includes building successful, long-term partnerships with our clients. By delivering unparalleled customer service, we are the trusted and preferred supplier for many leading regional and national brands.

## The road to success

We have been on a remarkable journey, going from a thriving business to one facing complete financial crisis when the recession hit in 2008, reducing sales by 50 per cent. This was a defining moment in our history, and we took tough strategic decisions to stay in business. Despite formidable debt repayment plans, we worked our way out of the recession, stabilised the company's cash position and rebuilt the business.

We emerged stronger, with our values and principles intact and retained our loyal, core customers and drivers. By the end of 2010, we had returned to break-even point, and by 2012, we had exceeded pre-recession sales levels. We have since



gone from strength to strength. Revenues have grown rapidly, from £1 million in 2009 to nearly £15 million in 2019, an average growth rate of 30 per cent per annum over the last ten years, and we have expanded from one branch to six and a team of 35.

We are a purpose-driven organisation with a loyal team of employees whose collaboration creates something special. We focus on driver recruitment and aim to be the best at it, while also being one of the most compliant recruitment agencies in the haulage sector.

### A perfect storm

We have overcome many hurdles, not least the last recession, and yet we are now facing even greater challenges, with the toxic combination of the current Covid-19 pandemic and the ensuing recession. This is likely to be aggravated by Brexit, the new points-based immigration regulations and the roll-out of IR35 reforms to the private sector in April. Meanwhile, the haulage industry has been polarised and has suffered enormous dislocation. Many of our clients, particularly supermarket and grocery suppliers, have operated at maximum capacity; home delivery has been in overdrive; while clients in the hospitality, service, manufacturing and construction sectors were seriously disrupted.

Around 300,000 LGV drivers are currently driving for a living in the UK, and the consensus is that there is an underlying shortage of up to 60,000 drivers. We expect the Covid-19 recession to cause a ten per cent drop in demand for LGV drivers over the next couple of years, although we also anticipate that this will be largely offset by a significant fall in the number of new drivers entering the market, caused by disruption and closure of LGV driver test centres. The net effect is that the driver shortage should remain unchanged.

Furthermore, the roll-out of IR35 reforms to the private sector in April 2021 will increase agency LGV driver employment costs. Hauliers, who are operating on razor-thin margins, will resist any increase in agency charges, while agencies will also be unable to absorb these cost increases due to decades of having their margins squeezed by their haulage customers. This will result in pressure on LGV driver pay rates, especially for those moving from the limited company model to PAYE, which disproportionately affects foreign workers. Added to this is the concern that Brexit and the new immigration rules will combine with IR35 to alienate many of the 40,000 foreign LGV drivers, while British drivers, dissatisfied with low pay and poor conditions, will also be tempted to move to other careers. The result is likely to be a worsening of the LGV driver shortage.

### Managing the circumstances

We have been working tirelessly through the pandemic to respond to these challenges and keep the nation's businesses on the road. We have been investigating and analysing how the pandemic has affected our industry, and we recently published a report to provide a clearer understanding of how Covid-19 has impacted our business, our clients and this sector,

“We are a purpose-driven organisation with a loyal team of employees whose collaboration creates something special”

Haulage sector faces a turbulent decade ahead





We hope for continued recognition of the essential services provided by delivery drivers and logistics workers

“We have been working tirelessly through the pandemic to respond to these challenges and keep the nation’s businesses on the road”

and how it will continue to do so for many years to come.

We’ve also taken a look into the future, beyond 2021, examining the trends that will influence the UK haulage sector’s prospects in the long term: the need for greater supply chain resilience; an increase in home working, ecommerce, digitisation, automation and robotics; greater government intervention; increased prominence of green methods; and an appreciation of key workers as strategic assets.

Although we face a turbulent decade with many challenges, we believe there will also be plenty of opportunities for the taking. We expect there to be a levelling of the playing field over the next couple of years, which will provide the survivors with exciting openings for growth and profit generation. We will continue to focus on being one of the most compliant specialist agencies in our sector, offering best-in-class service levels, in the belief that it will make us the partner of choice for the leading haulage operators.

In the meantime, we appeal to the government, HMRC and regulators to strictly enforce the IR35 legislation.

If they were to make clear examples of end clients, agencies and umbrella companies that conspire to employ tax avoidance schemes, we might stand a chance of an effective implementation of the new regime in April 2021. It is important that all parties go into the new tax year convinced that they must comply quickly with the new regulations, especially the end clients who may have to absorb a significant increase in agency costs.

The temporary recruitment sector provides a critical service to road haulage and logistics operators by enabling them to cost-effectively cope with substantial variations in demand throughout the year. This has been amply demonstrated throughout the Covid-19 crisis. The driver supply shortage, combined with Brexit and impending regulatory changes, represents a threat to the continued supply of temporary drivers and to the haulage sector. We will continue to support initiatives to avert a driver shortage crisis, but, in reality, it is only the government and HMRC that can intervene to achieve a successful outcome.

# Stones Residential



Stanmore Place, HA7



Joint CEOs Robert and Claire Stone with Managing Director Richard Zeff

Based in Northwest London, Stones Residential is an independent estate agent offering properties in Stanmore, Belsize Park and surrounding areas. With a team that pride themselves on their extensive knowledge of the local areas, the firm has now been operational for almost 20 years. In the following piece, Managing Director Richard Zeff looks at how the housing market can get back on its feet, with the help of estate agents like Stones Residential.

If you are looking to sell your home, choosing the right estate agent is vital. We know you have many options to choose from, but not all agents are the same. At Stones Residential, we know the local and national housing market and we have a strong track record. We'd like to take the time to help you find your ideal estate agent.

## The current state of the housing market

There is no denying the Covid-19 pandemic has affected every part of life, and the housing market is no different. The lockdown period, with the market halting between March and May, created a healthy level of pent-up demand. When the housing market reopened in mid-May, people whose move had been placed on hold were keen to move. Many market observers were taken by surprise at the extent of the activity, but there are many reasons why people looked to move when the opportunity arose.

A lot of people's personal and work circumstances changed over lockdown. Moving for work, losing a job and changes in a relationship status are common factors in people moving home, and these all occurred more frequently during the lockdown.

### FACTS ABOUT STONES RESIDENTIAL

- » Joint CEOs and owners Robert and Claire Stone
- » Managing Director: Richard Zeff
- » Established in 2001
- » Based in Stanmore, North London
- » Services: Estate and lettings agency
- » No. of employees: 15
- » [www.stonesresidential.co.uk](http://www.stonesresidential.co.uk)



“As a company who continually reviews the marketplace, the movement to the modern way of selling hasn't come as a surprise or shock to us”

Of course, industry observers believed this activity would diminish before too long, but the stamp duty holiday has invigorated demand for homes.

The stamp duty holiday strongly impacted the housing market in the second half of 2020. Having the chance to save up to £15,000 on stamp duty fees is a considerable incentive for people looking to move home, and it is no surprise that many households are planning a move. Another thing to consider is changes to buyer demand. The impact of the lockdown period has left many buyers looking for a larger home and property with a garden, or a more extensive garden. These features have long been popular and attractive for buyers, but in the current climate, they are likely to be essential elements for home-buyers.

### How you sell a home has changed

As a company with more than 20 years of experience in the local housing market, we understand the importance of tradition. There are many parts

of the house-selling process that haven't changed and are not going to change. This is why vendors benefit from calling on an agent that holds an excellent track record in the industry. However, we all must be aware the property market has changed. Buyers start the search process online, and so much of the process is undertaken digitally. If you plan on selling your home, you need an estate agent with a robust online presence, who knows how to connect and engage likely buyers online.

Ideally, it would be best if you had an estate agent who delivers you the best of both worlds. This is why you need Stones Residential. As a company who continually reviews the marketplace, the movement to the modern way of selling hasn't come as a surprise or shock to us. This is why we are pleased to say we have transformed the way we operate, and for the last two years we have been using a data-driven approach to selling homes.

Technology is abundant in the modern housing market, which helps us connect with likely buyers and enables you to sell your home. With the use of modern digital marketing strategies, we can target buyers with an interest in homes like yours, and homes in the local area. However, we also can retarget these likely buyers.

It used to be the case that if you didn't make a sale immediately, or at least collect contact details from an interested party, they were out of your hands. If the person remembered you or they found another advert, they could return, but it would often be down to luck as much as strategy.

This doesn't have to be the case, and when you choose Stones Residential, you don't have to rely on luck to sell your home. We retarget the most likely buyers, ensuring our name and your home remain at the forefront of their mind.

Bushey, WD23





Bushey, WD23

## Why one client chose Stones Residential

We take great pride in the story of a client who chose us to sell his home. During the client's search process, he asked for recommendations about a local estate agent who would sell his house. He received an email from his colleague, with a link directing them to our website.

This acted as an introduction to what we do and how we sell homes, but the client was highly impressed with our online presence after the website visit. Through retargeting activities, the client saw our adverts and social media content. Over time, we showed our skills and credentials, not to mention our strong and consistent presence.

As the client said, "If they can promote my home the way they promote themselves, they'll sell my house in no time." We were delighted to win this client's instructions and even happier to sell his home. We believe we can provide you with the same outcome, and we look forward to connecting with you soon.

At Stones Residential, we place the following core values at the heart of our estate agency:

- » Commitment – to you, and doing the right thing
- » Learning – about ourselves, the industry and what our clients want and need
- » Accountability – being the best agency we can, and taking responsibility for everything we deliver

Whatever reason you are looking to move home, we want you to have the most pleasurable experience. Selling your home does not have to be an uncomfortable or unsettling process – there are obstacles to overcome, but our experience and expertise will minimise the risk and pressure you are under.

Whatever your circumstances are, or what move you would like to make next, we are here for you. Stones Residential prides itself on offering the best standard of service to our clients, and we work hard to help you achieve your property goals.

“When you choose Stones Residential, you don't have to rely on luck to sell your home.”

# Protec Fire and Security



Founder and Chairman  
Barrie Russell



Protec headquarters and manufacturing facility, Nelson, Lancashire

Established in 1968, Protec Fire and Security Group provides building safety systems, which are designed to save lives and protect property. It is the largest independent UK-based manufacturer of fire detection and security products. It has grown to become a major manufacturer, employing over 1,200 staff from its head office in Nelson, Lancashire, and a network of regional offices throughout the UK. Founder and Chairman Barrie Russell expands here.

Our products are exported around the globe through a network of specialist trained agents and directly from Protec businesses in Holland, Spain and Australia. Over the last 50 years that we have been in business, our structure has evolved to accommodate the increasing success we continue to enjoy, while maintaining a warm and friendly family-business feel. We achieve this by maintaining a very flat communication structure, with a strong team culture that encourages all employees, at all levels, to speak out and offer ideas and suggestions to improve the experience of colleagues and clients alike.

This creates a more innovative and dynamic culture, ensuring ideas become a reality more quickly, which is reflected directly in the many industry-leading products and services we offer.

The strong family culture is positively reflected in the high retention levels of staff. This is further strengthened throughout the business, as staff gain skills and experience and are rewarded with promotion through capability, and new staff see the opportunities available to them to develop their career within a successful business.

## FACTS ABOUT PROTEC FIRE AND SECURITY

- » Founder and Chairman: Barrie Russell
- » Founded in 1968
- » Headquarters: Nelson, Lancashire
- » Services: Largest independent UK-based manufacturer of fire detection and security products
- » No. of employees: Over 1,200
- » Turnover: £122 million
- » [www.protec.co.uk](http://www.protec.co.uk)



We constantly strive for excellence in everything we do. Having motivated staff and a strong yet adaptable structure is essential to our success. The core activity of our business is to provide life safety systems to the highest-possible standards, exceeding those of our industry colleagues and government legislation. Our structure consists of the following core activities: product design; product manufacturing; planning and system design; supply, installation and project management; system testing and commissioning; and after-sales service and maintenance.

### Our experience

As manufacturers, many of the products we offer are available for direct dispatch from our manufacturing and storage facility here in the UK. Products can be supplied in an open protocol format for installation by others or via our in-house specialist installation teams. Our projects department are responsible for the installation and project management, while works are controlled by skilled engineering teams at site level with support from our network of regional offices.

For major projects, teams are assembled based on their specific expertise for the project. Specialist engineering teams, usually comprising project managers, installation supervisors and administration support, operate from both the Nelson head office and our network of regional offices.

Recent major projects include:

- » Palace of Westminster, London
- » Google European headquarters, London
- » Manchester Airport
- » West Ham United, London Stadium
- » Bloomberg European headquarters, London

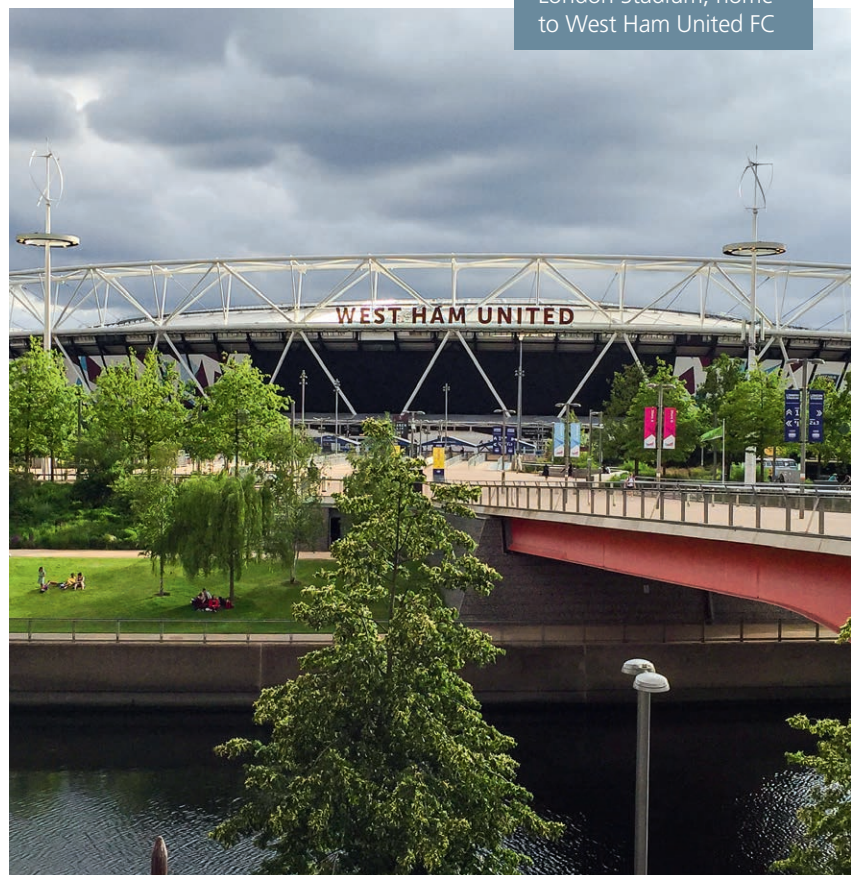
- » BBC MediaCityUK, Salford
- » Manchester United Football Club
- » Ministry of Justice sites nationwide
- » Crossrail, multiple sites

Our system-commissioning and after-sales service ensures clients receive the highest level of customer care, product reliability and technical support that we have to offer. We do not just perform the required functional and operational tests – our customer-service commitment includes assistance with on-site training of responsible personnel and advice on the different solutions available for modifications and alterations to existing systems.

A true national 24-hour, 365-days-a-year call-out service is provided to all our service customers. With call centres permanently manned, our assistance is only a phone call away. Of our over 1,200 UK staff, over 400 are field-based engineers, who provide technical expertise and emergency support when it is most needed.

“Having motivated staff and a strong yet adaptable structure is essential to our success”

London Stadium, home to West Ham United FC





Protec fire alarm and voice alarm systems are employed across the Palace of Westminster estate

### Case study – Palace of Westminster

Since our appointment as the nominated supplier of fire alarm and voice alarm systems across the Palace of Westminster estate, we have been working tirelessly with both strategic estates and their supply chain partners in upgrading and improving their fire safety systems.

Across the Palace of Westminster, the fire alarm and voice alarm system-upgrade works are now complete within the basement, Victoria Tower and Westminster Hall, with works continuing within the upper floors and Elizabeth Tower. When all works are completed, the palace will boast more than 8,000 fire alarm devices across more than 40 fire alarm panels. To minimise structural and visual impact within the many architectural, historical and sensitive areas of the palace, more than 90 Cirrus hybrid aspirating fire detection units are installed, together with several hundred 6500 Series wireless devices. Voice alarm is provided across the palace through a distributed network of more than 20 voice alarm racks.

Elsewhere across the Westminster estate, since our appointment, fire alarm, voice alarm and emergency voice communication systems have already been updated with Protec systems within 1 and 2 Millbank,

5 Great College Street, and Norman Shaw North. In addition, works are ongoing on site-wide infrastructure and across the following buildings: Derby Gate, the NEP and Canon Row.

From May 2018, we took over the responsibility for planned preventative maintenance and reactive maintenance for fire alarm and voice alarm systems across the Westminster estate. Through our success in delivering this service, our PPM package has since increased to include EVC systems, sprinkler systems, dry risers, Ansul systems and portable extinguishers.

Owing to the large number of projects taking place across the Westminster estate, from major construction projects to small remedial works, our appointment varies from supply and commissioning only, to full turnkey design, supply, install and commission contracts. This varied level of appointment is possible because we have a dynamic on-site management team who are based at the estate full-time, enabling us to meet with our numerous clients regularly, understand their requirements and provide the very best level of service.

### The future

Our success is due to our staff and our ability to self-deliver all of the above processes with minimal reliance on external resources, giving us control over our own destiny. Our structure allows us to offer our disciplines and processes in a format which enables a client to select the services they would like to purchase, giving them greater choice.

We are currently focused on recruiting additional engineering staff into our industry, either by retraining or apprenticeship schemes. We are particularly keen to attract more female recruits into a traditionally male environment. This is our current challenge.

“We are particularly keen to attract more female recruits into a traditionally male environment”



# SCI: Society of Chemical Industry



SCI HQ, Belgrave Square



Chief Executive, Sharon Todd

SCI is a charity that was established in 1881 with the aim of accelerating the commercialisation of chemistry and related sciences into industry, for the benefit of society. The intervening years have seen the organisation grow from a forward-thinking group of scientists, inventors and entrepreneurs, based in the UK, into a multidisciplinary organisation with an international reach and a vibrant hub for exchange of ideas. As SCI comes into its 140th year, SCI's Chief Executive, Sharon Todd, explains how the past is shaping the organisation's future and SCI's crucial role in bringing together key stakeholders to create solutions to the most pressing societal issues of our day, making SCI the place "where science meets business".

## Providing solutions to the global challenges facing society today

Our world is facing a multitude of problems, from climate change to sustainable food production, that no one organisation, government or industry in isolation can solve. What we do know is that scientific innovation, clever chemistry and meaningful collaboration are the keys to developing the new products, services, and technologies that are required as the world now looks to operate on a more sustainable footing.

At SCI we have a proud history. Our members, past and present, have used their talents to shape the increasingly technological and convenient world we live in. From the polymers used for prosthetic limbs and the medicines being developed to tackle conditions that were once thought untreatable, through to sustainable and nutrient dense food production, SCI members are among the leaders in tackling some of the world's greatest challenges.

### FACTS ABOUT SCI

- » Chief Executive: Sharon Todd
- » Founded in 1881 in the UK
- » International community
- » Services: Connecting industry, academia and government
- » 1,700 organisations connected in 2020
- » [www.soci.org](http://www.soci.org)



“SCI members are among the leaders in tackling some of the world’s greatest challenges”

### The criticality of chemistry

Chemistry is ubiquitous. Everything we touch, see, wear or use on a daily basis has been carefully designed by chemists using the chemical elements as building blocks to build complex molecular structures with use, functionality and cost in mind. Chemistry underpins the biological processes that control health or the food chain, and it provides complex materials that enhance functionality and drive step change improvements in technology.

As a consequence, SCI’s membership is very broad – our industry network stretches across energy, food, agriculture, transport, construction and pharmaceuticals, and our community encompasses multiple disciplines including chemistry, biochemistry, biology, engineering, environmental

sciences, horticulture, colloid and surface science, materials, artificial intelligence and formulation. The bridging across different disciplines and industry sectors is critical to enabling innovation that otherwise may not happen.

### Global health and net zero

SCI’s two areas of activity today are in global health and delivering net zero. Global health has clearly been in focus with the current Covid-19 pandemic, and many of our members have been instrumental in the development and delivery of vaccines and PPE. However, there is also a climate emergency, and perhaps lessons could be learned from the current health pandemic? Applying the effective strategies used to develop the vaccines in an unprecedented short period of time may also assist in the acceleration and adoption of new

SCI at a glance

MULTI-SCIENCE, MULTI-DISCIPLINARY  
INNOVATION COMMUNITY

# SCI TODAY

140<sup>th</sup> Anniversary (Est 1881) | 70 countries

CLIMATE CHANGE REGIONAL Scotland  
PLASTICS RECYCLING  
Formulation Forum  
Fine Chemicals  
Biotechnology  
ENERGY AMERICA  
Process Engineering  
International  
FOOD  
Sustainability  
LONDON Agrisciences  
Mid-Careers  
3D PRINTING  
BIG DATA  
Horticulture  
Global Health  
Chinese UK  
Materials

### PUBLICATIONS

**2.5M**  
Article downloads

**C&I** ~350  
Experts in their field  
Chemistry & Industry Magazine

~1 MILLION WEB USERS  
7 Peer-reviewed journals

### COMMUNITY

INTERNATIONAL  
organisation with  
a global network

> 60,000  
In the network  
~30 TIGs, RIGs  
and SIGs

> 600  
Early career  
researchers

> 500  
Universities  
> 900  
Companies

### CONFERENCES

Showcasing innovation into industry

- AgriFood Chain
- Energy
- Environment
- Health & Wellbeing
- Materials

**100**  
EVENTS PA

### SCI BELGRAVE SQUARE

INNOVATION SOCIETY

- Multi-science
- Multi-disciplinary
- Open society

- Academia
- Industry
- Patent Lawyers
- Consultants
- Entrepreneurs
- Government



technologies that will help meet the net zero greenhouse gas emissions targets quicker.

Chemistry has a vital role to play in effective management of carbon – both within the traditional chemical industry but perhaps, more importantly, in enabling other sectors to decarbonise. For example, about 110 million tonnes of carbon dioxide equivalent is emitted by cars, light vehicles, HGVs and motorbikes/scooters. Moving to electric drivetrains could significantly lower this, and the chemical and materials front end, which notably contains about 65 per cent of the value, can help deliver the necessary changes. Recycling and re-use of the battery components and materials, required to deliver a truly sustainable and more valuable supply chain than their conventional petrol or diesel counterparts, require innovation in chemistry and materials to be delivered.

Aerospace is another area where the chemistry is critical to enabling the sector to decarbonise. The domestic aviation industry produces about 80 million tonnes of carbon dioxide equivalent a year and international flights add about 36 million tonnes. The sector is evaluating battery power for short-haul flights, and even hydrogen, but in the short to medium term they are aiming to use ‘sustainable aviation fuel’. This is still iso-octane but produced with sustainable carbon feedstocks.

SCI’s central role is clear as we bring together the key players across industry and academia to work together to solve these complex challenges. This is done through our committees, via working parties targeted in specific areas, and through our extensive conference programme which provides a knowledge-sharing platform, always focused on the translation of the science out of the laboratory.

### From the bench to full scale

The various steps in the intellectual supply chain, from laboratory discovery to full-scale commercial manufacture, attract different

people with different skills, but most come from scientific or engineering backgrounds. The private investment in research and development (R&D) is a significant part of the overall investment in R&D in the UK and ensures a strong pipeline of talent, which is critical for industry in the UK.

The process of scale-up to commercialising is significant, costly and may take ten to 15 years from lab-scale to full-scale manufacture, and it is vital that there is a dialogue along the spectrum of scientists and engineers so that they can seamlessly work across the interface between academia and industry, and that knowledge from industry is also translated across, in particular, into university start-ups, providing critical know-how required to successfully scale up.

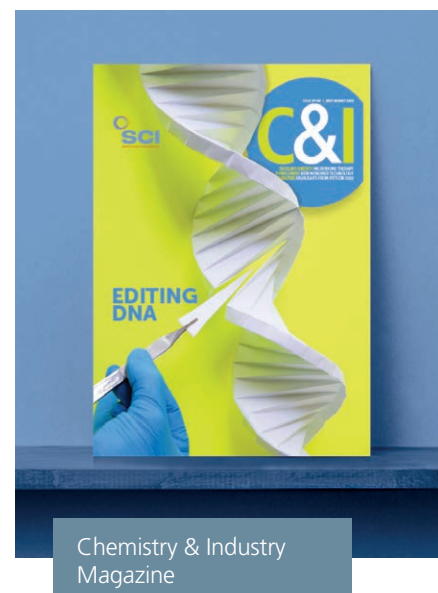
Tools, such as AI and digitalisation, are being scoped to assess how they can help reduce the product development timescales and bring significant improvements to manufacturing processes.

### Rethinking “business as usual”

What we have at SCI is unique. Where else would you meet a horticulturist, a physicist and a captain of industry in the same organisation? As we mark this special anniversary, our members continue to tackle society’s greatest challenges and pioneer the daring, game-changing innovations that will transform society. Here’s to the next 140 years of innovation at SCI.



Business training with ‘Bright SCIdes Challenge’ students



Chemistry & Industry Magazine

“The bridging across different disciplines and industry sectors is critical to enabling innovation that otherwise may not happen”



# Dairy UK



Chief Executive Dr Judith Bryans



Milk is a great British staple, with 96 per cent of UK households purchasing it on a regular basis

## FACTS ABOUT DAIRY UK

- » Chief Executive  
Dr Judith Bryans
- » Based in London
- » Services: Nutritional, environmental, technical, policy, consumer promotion, supply chain integrity and assurance schemes, national and international representation
- » No. of employees: 15
- » Dairy UK is responsible for administering the dairy industry's climate change agreements through Dairy Energy Savings (DES)
- » [www.dairyuk.org](http://www.dairyuk.org)

**D**airy UK is a processor-led organisation that represents farmer-owned co-ops and private dairy companies. Its overarching mission is to promote the consumption of British dairy products at home and on the international market. It relies on strong partnerships with farmers and stakeholders along the supply chain, and works with MPs and the government to promote a better understanding of the dairy sector and its products. Chief Executive Dr Judith Bryans explains more.

The need to reduce our industry's impact on the environment is undisputable, and creating a sustainable future is an urgent task not just for the food sector, but for the world as a whole. Cows have for centuries provided us with some of the most nutritious foods we eat, but through their digestive process produce and emit methane, a gas which contributes to warming our planet.

The many headlines and claims we see calling for radical changes to our diets, such as reducing or eliminating dairy tend to ignore the huge complexity of sustainability, which both the food industry and Governments have to contend with. Key among these is the creation of a food system which can adequately feed and nourish entire populations.

Given what's at stake, moves to achieve a sustainable food system must be measured, effective and understanding of complexity, not knee-jerk reactions. Sustainability has become a catch-all for many things, with its meaning often nebulous and subjective. In reality, it has a very specific meaning which is key in discussions on addressing climate change.



The United Nations defines sustainability as having three pillars: environment, society and economy. Through this definition, the dairy industry looks totally different, and, with context, it's clear that though reducing emissions is important, the contribution that dairy makes to the other pillars is significant.

## Environment

As we know, cows belch out methane into the atmosphere, but this is just one half of methane's journey. This gas is in fact part of a natural cycle which has been around for millennia. Cows eat inedible grasses and through digestion produce and dispel methane. The methane remains in the atmosphere around ten years before being broken back down into its component parts and reabsorbed back into the soil.

Thanks to strides in efficiencies in milk production, methane emissions from UK dairy cattle have declined by 15 per cent since 1990. This decline means that British dairy has actually contributed to global cooling.

Cattle are more than their burps; they help us maintain our famous green pastures and countryside. They also help renew topsoil by creating Mother Nature's very own fertiliser: manure. This nutrient-packed stuff helps renew the soil, which is crucial for growing grasses and crops. Without cattle manure, organic farming simply wouldn't be possible, and our ability to farm crops, fruit and vegetables would diminish.

## Society

We can often forget that the primary function of a food is nourishment, not just taste. A sustainable food system must reflect this and ensure it delivers the nutrients people need to live healthy and well-nourished lives. Milk, cheese and yogurt are packed with calcium, but that's not all. Dairy foods contain other, lesser-known nutrients –

such as high-quality protein, B vitamins, iodine, zinc, potassium, vitamin A and phosphorus – which are just as crucial to good nutrition and health as calcium.

What's more, these nutrients are contained within a cost-effective and accessible package for families in any socio-economic group. The nutritional strength of dairy makes it incredibly important for children and forms the basis of school milk schemes across the globe, which recognise that without quality nutrition, children cannot learn and develop to their fullest.

No other food can match dairy like-for-like, in terms of nutrition. We've seen many beverages come to market claiming to be replacements for dairy, but even after significant artificial fortification and processing not one of these beverages can match the nutrition of milk; it is truly a one-of-a-kind product.

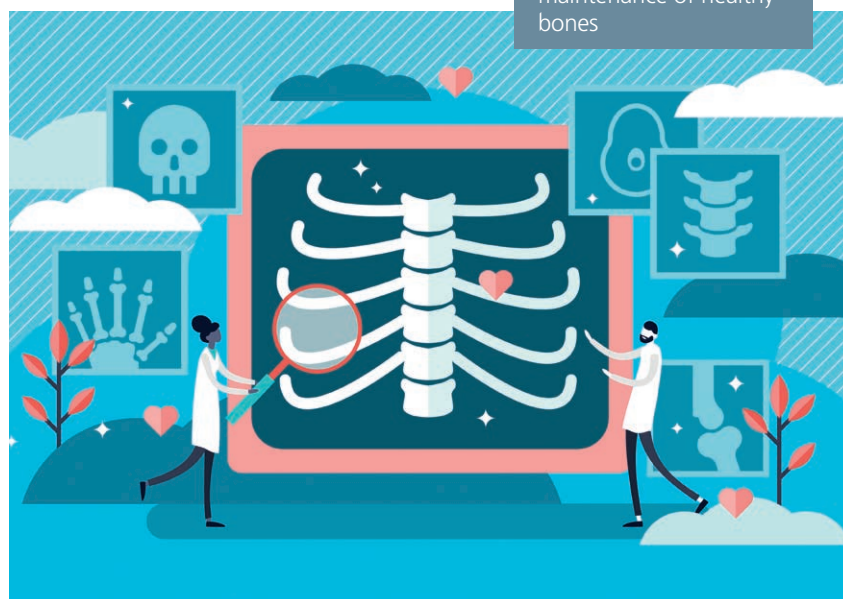
Dairy nutrients contribute to a range of functions around the body, from maintaining bones and teeth, to regulating thyroid hormones, to nerve and brain function. Dairy nutrition fulfils many roles.

## Economy

The UK dairy industry is an important contributor to the UK economy, providing not only nutritious and

“No other food can match dairy like for like, in terms of nutrition”

Milk is a good source of calcium. Calcium is needed for the maintenance of healthy bones





Thanks to efficiency gains methane emissions from UK dairy cows have declined 15 per cent since 1990

“Dairy farming is the UK’s biggest agricultural sector, with 12,000 dairy farmers looking after 1.9 million cattle”

tasty foods but also livelihoods and employment for thousands. Dairy farming is the UK’s biggest agricultural sector, with over 12,000 dairy farmers looking after 1.9 million cattle, employing 50,000 in direct and supporting industries. Dairy farmers play crucial roles in their local communities and are part of the lifeblood of rural economies.

Dairy processing is also a key source of employment in the UK, employing 24,000 skilled workers in everything from food technology to marketing and logistics. In 2019, as a sector, we produced a whopping 15.2 billion litres of milk, generating £4.4 billion in value and a collective turnover of £9.2 billion. We provide some of the nation’s best-loved, tastiest and most purchased foods, with milk found in 96 per cent of fridges across the UK. Furthermore, 92 per cent of UK adults regularly buy cheese and 81 per cent buy yogurt.

### Looking forward

The changes we make now will have a ripple effect on generations to come, so we need to make sure we

make the right decisions. The dairy sector is working hard to reduce its environmental footprint, and for over 12 years we have publicly reported on our targets, commitments and progress through The Dairy Roadmap – the industry’s sustainability strategy, which is used as a blueprint for initiatives across the world.

As a sector we are also currently embarking on a process to assess and publish the contribution we can make to the UK’s net-zero commitment, engaging the dairy supply chain in the run-up to the 26th UN Climate Change Conference of the Parties.

So do not judge a cow by its burp. We provide nutrition, environmental benefits, world-leading sustainable farming methods and employment and are a bedrock of rural communities. We take full responsibility for environmental impacts as a sector and we continue to work hard to continuously improve. Using innovative solutions and new technologies we are achieving advanced efficiencies. Dairying and dairy products can and should be part of a sustainable future.



# Lincoln College Group



Higher education graduates



CEO Gary Headland

Lincoln College is where Lincoln College Group started on September 27, 1886, and its core values remain 134 years later – to provide recognised economic and social value to the community it serves. It now incorporates Newark and Gainsborough Colleges, where professional technical training, apprenticeships, GCSEs, A levels, degree and now master’s programmes are delivered. CEO Gary Headland shares an insight into how the group operates and some of the projects it has undertaken.

Lincoln College Group has grown exponentially over the last six years into a strong, sustainable business that is able to invest in employer-led training.

## Our partnerships

The mobilisation of colleges in the Kingdom of Saudi Arabia, educational contracts in China and training consultancy in Romania and the Caribbean have been reflected by commercial activity in the UK. Meanwhile, the development of Ofsted outstanding training at IRC Morton Hall, the expansion of the group’s gym and spa, the introduction of Escape Rooms at Lincoln College, an in-house catering business and ventures like students providing match-day catering at Lincoln City Football Club continue to diversify income streams and disperse risk.

In a sector that has suffered a decade of real-terms funding cuts, the group leverages its sustainability by continuing to invest in employer-led education and training. Additional income streams have funded productivity wrappers for employer-led

## REPORT CARD LINCOLN COLLEGE GROUP

- » CEO Gary Headland
- » Founded in 1886
- » Location: Lincolnshire, Nottinghamshire, international
- » Type provision: Further education, higher education, apprenticeships
- » No. of students: cca 18,000
- » Our commercial portfolio includes a suite of escape rooms and catering for Lincoln City Football Club
- » [www.lincolncollege.ac.uk](http://www.lincolncollege.ac.uk)



“Investment is made in additional teaching hours with industry experts and creating inspiring industry-standard learning environments”

programmes. Investment is made in additional teaching hours with industry experts and creating inspiring industry-standard learning environments.

This approach sparked the development of the Air and Defence Career College, which now has sites in Lincoln, Stamford and King’s Lynn. It also led to the development of a construction college in Gainsborough, which has now been expanded to Lincoln with partners including Gusto Homes, Dulux and the Bell Group. Our partnership with Team Knowhow Dixons Carphone has led to the development of a bespoke micro-college to train IT technicians. This programme has recently been awarded the Princess Royal Training Award.

AMP Rose, Eminox, Wefco, Regal, Trepko, Clean Tech, A Schulman and Hooton Engineering are all partners with Gainsborough College at the Made in Gainsborough Centre of Excellence. These firms suffered crippling skills shortages for years but now have a pipeline of highly skilled engineers.

Our Digital Business Academy produces skilled marketeers and general business apprentices via digital internships with firms like Distract, City X, Wallbreaker and KryptoKloud.

Our care college at Lincoln and Newark Colleges, which was co-designed by The Orders of St John Care Trust, The Priory and LinCA, is the first in the UK to enable students to gain the industry gold-standard Care Certificate in the Workplace. Investment enabled by our commercial arm continues this year with the launch of our policing college in partnership with Lincolnshire Police and G4S. This provides a pipeline of highly skilled staff into support roles like emergency call handlers and custody officers. It also offers a progression route into police officer roles via the college’s new professional policing degree.

### Social and economic value

All of these programmes, which are only possible due to investment via our commercial division, have been created in direct response to employer need.

The skills and qualifications acquired by former learners at LCG bolster the Lincoln College Service Area’s economy by increasing employer outputs and adding around £141.7 million in income to the regional economy per year.

Altogether, Lincoln College contributes approximately £185.5 million in additional income per year to the local business community. The college continued to train throughout the Covid-19 lockdown and will be integral to the county’s ability to bounce back via innovation and growth.

### Exploring new territories

New training opportunities across the group’s specialisms of applied engineering, health and social care and business education and training are being explored in the UK, China, KSA, Eastern Europe and beyond.

The group is working to a ten-year plan in KSA and continues to run its highly regarded Qatief Female College contract. It also runs a tourism and

Engineering students in Riyadh





Lincoln College further education students

hospitality college in Riyadh and has recently won the contract to run the Inspection Technology & Quality Assurance National Institute, also in Riyadh.

In China, the group is running ecommerce courses at Chengdu Industry and Trade College and is delivering accountancy at Guangdong Construction Polytechnic from September. Our UK commercial business also continues to expand. We are exploring further Ministry of Justice contracts in prison settings to build on our work at IRC Morton Hall, and we have signed a new contract with Lincoln City Football Club to provide catering services this year.

Lincoln College has now taken all catering in-house to be run as a commercial venture and is offering outside catering services for businesses and events. The college has expanded its Escape Room partnership with Escape Lincoln and is now running eight rooms.

This strong international and commercial footing, which provides significant profits for reinvestment in education and training, is also enabling an expansion of our employer-led

productivity wrapper programmes. This year the group invested additional international income to launch a care college at Lincoln which has now been expanded into Newark College. We recently have secured GLLEP Skills Capital funding to develop the Gibney Building in Monks Road in Lincoln.

Work will start this year to transform this building into the flagship Institute of Technology for Lincoln. IOTs are a partnership with the University of Lincoln and other further education colleges, and this centre will focus on higher-level digital, health and social care and applied engineering skills areas. The group also has several live Towns Funds bids. At Newark the college plans to open the country's first International Air and Space Institute, which will transform the way pilots, future astronauts, engineers and ground staff are trained.

By continuing to generate significant additional income via international and UK commercial work, LCG will continue to transform its curriculum to develop highly skilled and productive staff to underpin the local economy and help it thrive.

“Strong international and commercial footing, which provides significant profits for reinvestment in education and training, is also enabling an expansion of our employer-led productivity wrapper programmes”

# ServiceMaster Clean By Deeland



Managing Director  
Nick Dee Shapland



Communal housing quality assurance  
management programme meeting

## FACTS ABOUT SERVICEMASTER CLEAN BY DEELAND

- » Managing Director: Nick Dee Shapland
- » Established in 1991
- » Based in Newbury
- » Services: Contract cleaning, residential and commercial cleaning services, fire and flood restoration services and disinfection services
- » No. of employees: 360
- » Award-winning business
- » [www.servicemasternewbury.co.uk](http://www.servicemasternewbury.co.uk)

ServiceMaster Clean Newbury has been owned and operated by Deeland Limited for nearly 30 years. It started as a ServiceMaster Contract Services franchise in Newbury and Reading, carrying out daily office cleaning services, before becoming a limited business in 1998. As Managing Director Nick Dee Shapland explains below, its operations now extend across Wiltshire, Gloucestershire, Oxfordshire, Berkshire and Hampshire.

The first 15 years of our growth was dedicated to commercial office cleaning, during which time we gained considerable experience and knowledge in servicing corporate companies such as Vodafone in the early 1990s. This enabled us to attract a wide range of commercial customers, from large financial institutions to sports series such as Formula One.

In 2003, one of the largest housing associations in the country put out a tender for its countrywide cleaning contract. We won the tender, a term partnering contract, which meant total business transparency between the contractor and the customer. For the first two years we exhibited at the Chartered Institute for Housing in Harrogate to research the housing market, as we appreciated that the relationship between the housing association and its tenants was crucial. Our role was to ensure that we provided great customer service – and the rest is history. We now have a dedicated communal contract services division that has been servicing housing associations for 17 years.

Today, our residential and commercial cleaning services division delivers specialist cleaning of hard and soft furnishings for both domestic and commercial properties, restoration services for fire and flood work and infection control measures for bacteria such as MRSA. This division also services our contract services business.



In around 2006, I began to start working on the business and driving growth. I was fortunate to be able to revisit some material I received from a ServiceMaster training day held back in 1992, which explained the meaning of ServiceMaster's four corporate objectives that had been at the heart of our global operation since the beginning.

They are:

- » Principles: Based on a correct or ethical way to conduct ourselves and our business.
- » People: Represents our dedication to our employees; we recognise that our success as a company rests upon the development and performance of our people.
- » Performance: To pursue excellence is to believe that no target other than the best is worthy of our focus and our people's effort.
- » Excellence: This comes from ensuring each aspect of customer interaction is viewed as a unique opportunity to excel and exceed expectations.

With the opportunities being presented to us by the contract cleaning market, I could see that there were measures that needed to be put in place to help us become a proactive business. From 2009, we introduced an annual general meeting, which would include all our full-time employees, from management to administration, supervision to commercial cleaning operatives. Each year we would have a theme, with the first being the pursuit of excellence. During the meeting, I was able to use extracts from Sir Clive Woodward's book about winning the 2003 Rugby World Cup. We discussed the topics that he believed contributed to great teamwork, including leadership, team spirit and communication, and I felt the format worked well.

### Constant improvement

In 2010, I made a concerted effort to improve communication within the business. Today we have seven business



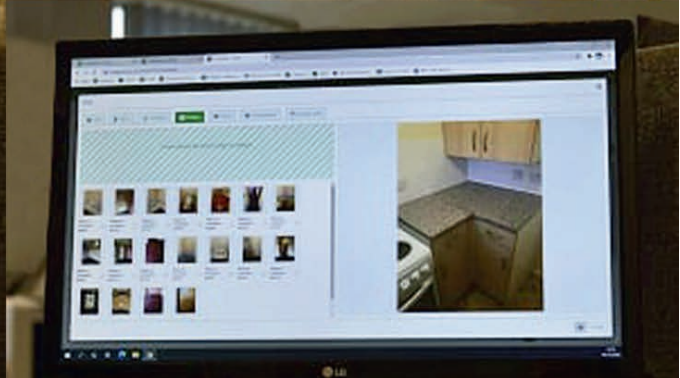
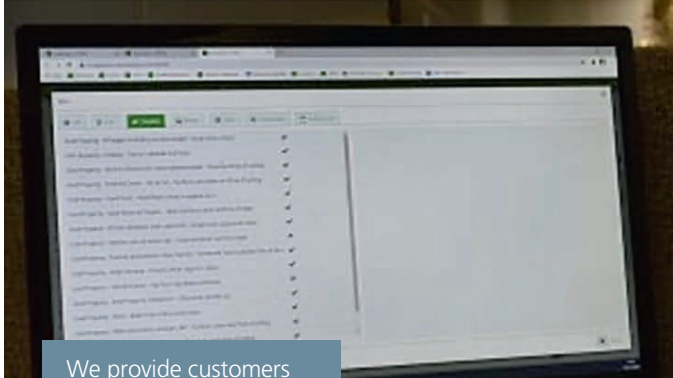
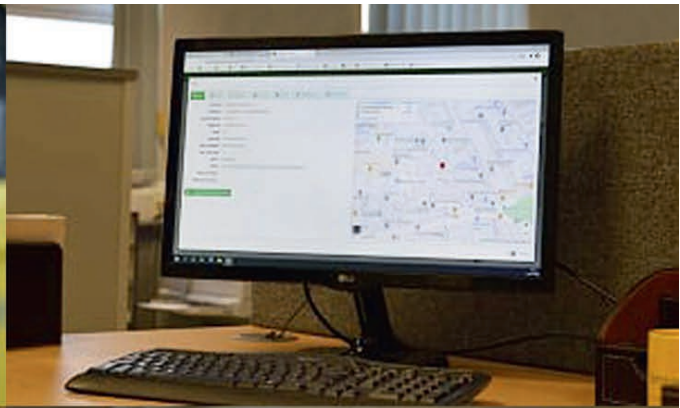
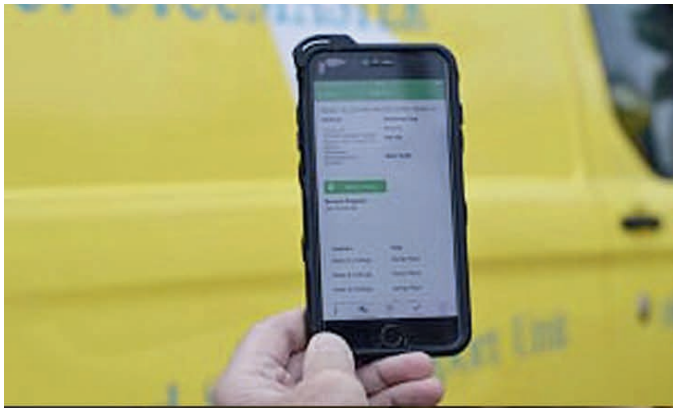
On-going field operations training and auditing programmes

departments, three of which are service divisions. Each department operates a quality assurance management programme, which are conducted through meetings that follow a set agenda. More than ten years later, I see a totally different business, where everyone is able to interact with each other and is focused on the job at hand.

Our quality assurance management programme is audited through ISO9001/14001 and is ISOQUAR – UKAS accredited. An area of the business that has certainly benefited from ISO 9001 quality management system is our environmental outlook. We have introduced a discipline of continual improvement, and as a commercial cleaning contractor we have gained all the necessary accreditations – a further endorsement of our commitment to quality.

We have a human resources department that deals with all employee-related matters. It is reassuring for our managers and supervisors to have a team dedicated to dealing with personnel matters, especially with the pressures placed upon people in both business and everyday life. We are better equipped today to deal with mental health issues, and without question the welfare of our employees is a responsibility we take very seriously. Helping our people develop is of paramount importance. We became

“We have introduced a discipline of continual improvement, and as a commercial cleaning contractor we have gained all the necessary accreditations”



We provide customers with up-to-the-minute service information through our CIRUS customer service portal

a British Institute of Cleaning Science training centre, which enables every cleaning operative to be trained using its specialist job skill method.

the job, an on-site risk assessment, checklist of tasks, photographs and detailed set of notes is sent straight to the customer service portal.

“With over 60 years’ experience in the industry, we have the products and methods to meet cleaning, sanitising and disinfection requirements”

When providing services to multiple sites, our commercial cleaning operatives and technicians use specially equipped mobile workshops. These include the latest Hydramaster TITAN Truck Mounts, 500-litre water tanks, high-reach window cleaning equipment, generators, vacuums, flat mops and over 60 service vehicles.

With over 60 years’ experience in the industry, we have the products and methods to meet all cleaning, sanitising and disinfection requirements. During the Covid-19 pandemic, for example, we carried out disinfection cleans for schools, NHS test stations and commercial offices. We also provide customers with up-to-the-minute service information through our CIRUS customer service portal, which was developed through Taskport exclusively for our business. From the cleaning operatives’ mobile phone, the app delivers information on every service programme and quality programme carried out on site. Within minutes of completing

### The future

I have put in place plans for Deeland Limited to move over to an employee ownership trust going forward. This has been 18 months in the planning, and I have required the help of key staff, accountants, the Employee Ownership Association, specialist EOT solicitors and the agreement of ServiceMaster itself.

It is my wish for the employees of Deeland Limited to benefit from the great teamwork that has been developed over many years by allowing them to become part of an Employee Ownership Trust, which will be managed and operated for the benefit of all the employees of the trust. A senior management team has been set up to run operations, while the trust will have a chairman, employee representative and independent business executive. All being well, it will place the future of the business in the hands of the people who have helped it grow over the last ten years.



# JF Electrical Services (Midlands) Ltd



Renewable energy at work



Directors Jamie and Elisa Farmer

Three decades in the electrical contracting market have given JF Electrical Services (Midlands) Ltd the right kind of experience to thrive in their line of work. Directors Jamie and Elisa Farmer explain that they have overseen considerable change in their time in the sector. They discuss the difficulties in adapting to a tumultuous economy and talk about how the firm has succeeded in thriving. According to Jamie and Elisa, one of the greatest pressures of the day is the drive to remain sustainable – something they talk about at greater length with *The Parliamentary Review*.

We are an SME electrical contracting company, offering services throughout the domestic, commercial, security, fire and industrial sectors. We were first established in 1991 as a sole trading company, and based on our continued and steady growth, we moved on to employ subcontractors and permanent staff, including skilled electricians and apprentices. In 2004, we incorporated as a limited company.

We operate mainly in the Midlands, serving households, businesses and construction companies. We also carry out projects which range from small offices to large manufacturing and warehouse units. Although most of our business is conducted in the Midlands, we have also provided installations throughout England in areas such as Cornwall, central London and Sheffield. Alongside our many domestic customers, we have also worked for much larger concerns including Group4 Technology, Autosmart International and large, Midlands-based engineering companies such as A&M EDM Ltd.

## FACTS ABOUT JF ELECTRICAL SERVICES (MIDLANDS) LTD

- » Directors: Jamie and Elisa Farmer
- » Established in 1991
- » Based in Tamworth, Staffordshire
- » Services: Electrical contractor
- » No. of employees: 6
- » Elisa joined the business in 2004 after many years' experience in the construction industry
- » [jfelec@btinternet.com](mailto:jfelec@btinternet.com)



“Our ethos has always been to provide the best installations and working practices in order to maintain our high standards”

### A strong reputation built on high standards

We pride ourselves on operating a professional company, supported by a staff team with a strong range of skillsets and disciplines. Our ethos has always been to provide the best installations and working practices in order to maintain our high standards and ensure we are fully compliant with any industry regulation. We are proud to have a good reputation in our sector, with a high level of repeat customers and customer recommendations. Our overriding goal is, and always has been, to be the best in our field.

A completed domestic installation project



All of our electrical staff are trained to current wiring regulations, which are presently the 18th edition of BS 7671, and all of our employees hold health and safety site cards. We also ensure all of our electrical staff are trained to operate mobile elevated work platforms. This attention to detail and safety is a key foundation of our business and we always provide high safety compliance, making sure we can protect our staff, our clients and the general public during any project we undertake.

Our company is registered with the National Inspection Council of Electrical Installation Contractors and have been awarded Approved Contractor status, something we have held since 2005. The NICEIC carry out at least one annual inspection visit to our premises, comprising an office compliance audit and several on-site inspections. This ensures the correct procedures are being upheld and all works are compliant with current wiring regulations BS 7671. Beyond this, we are also registered under the government’s Trustmark scheme.

We recently registered with the Office of Low Emission Vehicles and obtained approval to carry out installations in accordance with their rules and the IET wiring regulations for electric vehicle charging units. As well as contributing to efforts to reduce our environmental impact, this status enables us to obtain government grants for our customers.

### Adapting to economic difficulty

As a company, in order to survive the recession and other challenging economic climates, we have adapted over the years. Key to this was embracing technological advances in

our industry, such as home automation and advanced lighting systems. We have also invested in training and equipment to enable us to carry out the installation of solar PV panels and electric vehicle charging points for various customers.

The renewable energy sector is now on the increase, as we believe it should be, and we want to encourage our customers to view all of the different options available.

Although we pride ourselves on encouraging and assisting the country in playing its part in such important issues, we feel that we have been let down by the departments running the schemes which were set up to assist the installer and end user and contribute to our country's commitments to reducing emissions.

We have had the experience of applying for Carbon Trust grants, Feed-in-Tariff paperwork and OLEV payments for car charging installations. Our experience with these departments has been poor and we have found them to be difficult to deal with, involving ever-changing rules and early cancellation of these schemes as money runs out.

Beyond this, we have also experienced problems with government apprenticeship programmes. These schemes come at a large cost to the employer and we have been consistently let down by training providers and local colleges.

The administration of these colleges is almost non-existent and we often find they do not follow procedure and frequently wait until the courses are almost complete before they ask for the portfolio information and relevant paperwork from the employer,



Commercial and industrial work

something they should have done at the outset.

The final issue we face is with Part P, a government scheme which we agreed and adhered to. However, it is not policed and local councils do not have the manpower, finance or expertise necessary to enforce it. Therefore, we find time and time again that we lose work in the domestic sector to non-registered individuals and companies who carry out works for low prices but use unsafe practices. This has to be one of the biggest issues that SME electrical contractors face and we cannot emphasise enough how much the industry must clamp down on this issue.

“Our overriding goal is, and always has been, to be the best in our field”



# Aluminium Federation



CEO Tom Jones



Members networking at the ALFED Business Briefing 2019

## FACTS ABOUT ALUMINIUM FEDERATION

- » CEO: Tom Jones
- » Established in 1962
- » Based in Halesowen, West Midlands
- » Services: Putting aluminium at the heart of UK manufacturing and production
- » No. of members: 143
- » [www.alfed.org.uk](http://www.alfed.org.uk)

The Aluminium Federation (ALFED) is an organisation that collaborates with businesses and stakeholders to champion the interests of the aluminium sector, which includes advising and assisting wider industry and the government. With the sector generating £10 billion annually and employing more than 20,000 people nationwide, ALFED believes it can play a vital role in the UK's future competitiveness. CEO Tom Jones explains to *The Parliamentary Review* that its position gives the organisation a unique perspective on how the sector's interests align with the UK's strategic aims and how stakeholders can work together to foster a strong, sustainable industrial base for the country.

Aluminium plays a vital role in the supply chains of high-value sectors like aerospace, automotive, rail and construction, as well as mass markets for packaging. Every day, we travel in it, eat and drink from it, make utensils and objects from it, and use equipment and appliances made of it. Life without aluminium would be quite unthinkable in this day and age, and, thanks to the UK's expertise and capacity in this area, it's a sector of profound national significance. That significance is skyrocketing as the UK looks towards a competitive post-Brexit, post-Covid-19 economy – an economy based on an ambitious green vision.

ALFED is the voice of the UK aluminium industry. We represent 143 businesses and the wider value chain that process, trade and work with aluminium – fostering innovation, promoting best practice, developing skills, providing insight and representing industry interests. We work closely with government and parliament, including the Department for Business, Energy and Industrial Strategy; the



Department for International Trade; HMRC; and the ONS. We administer the All-Party Parliamentary Group for Aluminium and collaborate with other UK and international trade associations, universities and innovation hubs.

## Post-Brexit competitiveness

Aluminium imports and exports are worth more than £5 billion annually, making them highly valuable elements of UK trade. Take drinks packaging as an example. The UK is a global leader when it comes to using aluminium for this application – we use an estimated 220,000 tonnes per year. We import most rolled material for can manufacturing from the EU. When it comes to recycling, we're a powerhouse. In 2019, the UK recycled almost a million tonnes of aluminium scrap. We export recycled aluminium to the EU, where it's transformed back into can sheet. The relationship is the circular economy in action.

Our importance within the global aluminium industry extends beyond the EU. Our exports to other countries are worth more than £1 billion each year, making us a crucial trade partner for countries like the US, Japan, South Korea and Canada.

We have a close working relationship with BEIS and the DIT. Since the 2016 Brexit referendum, we've given vital industry input into trade policy development, whether it relates to EU negotiations, US aluminium import duties or anti-dumping measures. From rules of origin to tariffs to regulation, we're helping shape the UK's negotiating position – and ensuring post-Brexit trade terms work well for UK supply chains.

## Supporting the engine of the UK economy

Aluminium is a critical component for supply chains essential to managing Covid-19, including medical supplies,



ALFED members  
Business Briefing 2019

electricity transmission, building materials and sterile packaging. As a result, aluminium sector operations have had to continue in a safe yet productive manner.

We've been an important government partner when it comes to mitigating the effects of coronavirus on industry. And we've had remarkable success helping the aluminium sector negotiate these challenging circumstances. In fact, we've had 35 members join this year, reflecting the quality of support we're offering.

We were on the government's consultative committee for safe working guidelines, ensuring social distancing and other new health and safety measures are effective and workable. Our fast-turnaround

“Our fast-turnaround Covid-19 member surveys have helped stakeholders understand the changing reality on the ground”

The Rt Hon. the Lord Paul  
speaking at the 2019  
House of Lords lunch





House of Lords lunch  
2019

“We’re advising on a roadmap that ensures organisations have guidance, support and incentives to achieve the UK’s many green growth objectives”

Covid-19 member surveys have helped stakeholders understand the changing reality on the ground. And, through our weekly meetings with BEIS, our members have remained highly engaged in helping government understand different trade-offs and financial support requirements.

Mental health – an important but often-neglected topic in manufacturing – has been a major focus area for us. As we moved our popular training programmes online, we launched webinars supporting members with issues around mental health, working from home and the associated loneliness. We also continued our technical and management training to ensure ongoing skills development. Our programmes have been extremely popular, with webinars getting more than 100 attendees.

### Green industrial revolution

One of aluminium’s advantages over competitor materials is its capacity for repeated recycling with high recovery rates and without quality loss. Aluminium recycling offers clear energy and environmental benefits – it requires only around five per cent of the energy use and emissions associated with primary production.

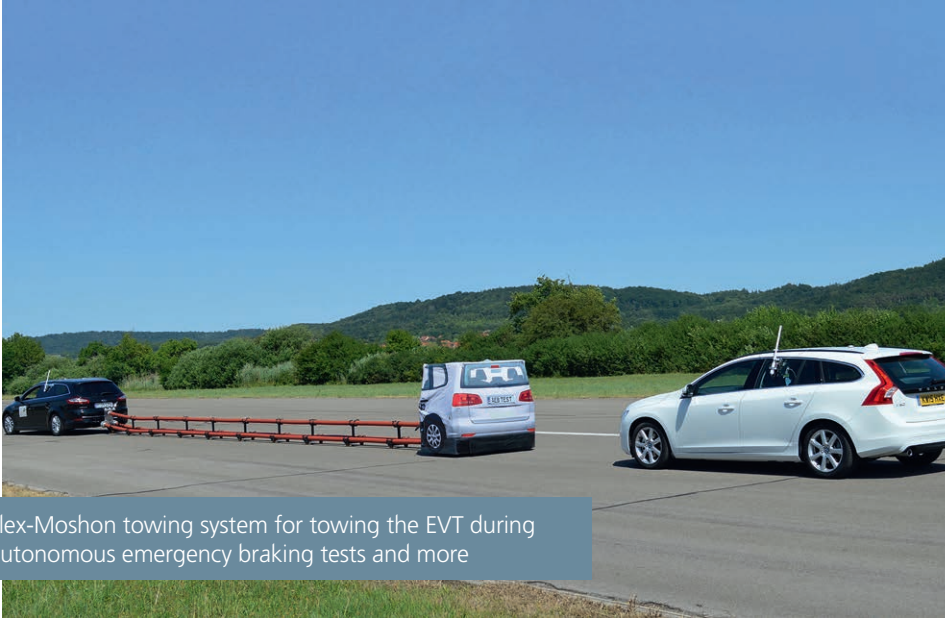
Because it’s a lightweight and endlessly recyclable material, aluminium is a key contributor to the low-carbon economy. Its role will continue to expand, from replacing single-use plastics to supporting more sustainable transport. Therefore, the aluminium sector is key to the government’s green growth strategy and carbon-neutral vision.

We’re helping government formulate an ambitious yet viable green agenda for industry. Working with government minister Nadhim Zahawi and BEIS, we’re contributing to a clear, consistent strategic plan that brings together the many green strategies already developed. We’re advising on a roadmap that ensures organisations have guidance, support and incentives to achieve the UK’s many green growth objectives.

Going forward, the aluminium industry looks to be a flexible, cost-effective and sustainable partner within upstream and downstream supply chains. And we look to develop new technologies and processes that promote a more competitive and low-carbon UK industrial base. From training and knowledge sharing to collaborating with government and wider industry, we’re helping members and stakeholders find the best solutions for the future.



# Moshon Data



Flex-Moshon towing system for towing the EVT during autonomous emergency braking tests and more



Managing Director Steve Boyle

Established in 2013, Moshon Data specialises in manufacturing a range of soft targets that represent real-world vehicles or roadside items. These soft targets allow car manufacturers to test vehicle safety technology (VST) in a safe and controlled environment before vehicles make it onto the road for public use. Having over 14 years' experience in the automotive test industry, Managing Director, Steve Boyle takes pride in the knowledge that his business plays its part in helping to lower road traffic accidents and fatalities.

Recognised as being the official vehicle target supplier for Global NCAP, Moshon Data's foremost concern is road safety. Indeed, one of our most popular products, which is manufactured to meet Euro NCAP specifications, is the Moshon Data Euro NCAP Vehicle Target (EVT). Developed to simulate the rear end of a standard production car, the EVT allows manufacturers to test collision avoidance technologies such as auto emergency braking (AEB) and is suitable for radar, lidar and camera-based technology. The Flex-Moshon towing system is a further innovation designed to enable the EVT to be towed, thus enabling manufacturers to perform low-cost testing of their AEB systems in mobile road scenarios such as car-to-car rear moving and braking (CCRm/CCRb). The Flex-Moshon not only operates in a straight line but is also capable on bends and cut-in manoeuvres for further advanced testing.

Over the years, our team have developed a range of custom targets such as walls, crash barriers, pedestrians, shopping trolleys and even animals such as deer and moose, all of which are commonly involved in vehicle collisions.

## FACTS ABOUT MOSHON DATA

- » Managing Director: Steve Boyle
- » Established in October 2013
- » Based in Witney, Oxfordshire
- » Services: World-leading car target manufacturers
- » No. of employees: 9
- » [www.moshondata.com](http://www.moshondata.com)



“We invest a large proportion of our time in research and development so that we can continue to deliver high-quality innovative products”

## Innovation

As a company we strive for continuous improvement in order to stay ahead of the market and, more importantly, our competition. We invest a large proportion of our time in research and development so that we can continue to deliver high-quality innovative products that are designed to assist engineers in projects that require accuracy.

Building upon our reputation as world leaders, we have recently been awarded the 2020 Hardware Innovation Award for the *Automotive Testing Technology International* magazine. To be accredited with this industry award and receive such recognition for our Night Environment Simulation Tunnel innovation is something that we are immensely proud of. Measuring in at an impressive 122m in length, it is considered to be the largest inflatable tunnel in the world and enables vehicles to be tested in the dark during the day and offers a controlled test environment. What is more, constructed from various sections, it is fully customisable and can be arranged to suit a variety of testing needs.

In addition to this, our Moshon Village innovation led to us becoming finalists in the West Oxfordshire Business Awards 2020. This pop-up village is a customisable product designed to enable advanced driver assistance systems (ADAS) and autonomous vehicles to be tested in real-world live scenarios.

- » Buildings and cityscapes
- » Obstruction walls
- » Pavements and traffic islands

- » Euro NCAP streetlamps and masts for vulnerable road user testing in the dark
- » Pedestrians
- » Customisable roadside furniture

Each individual environmental object is designed to behave and respond to vehicle sensors as though they were the real thing. One of our villages was purchased for use at the Millbrook-Culham Testbed for controlled and semi-controlled connected autonomous vehicle (CAV) testing. This test and evaluation environment is a government-backed partnership and is described as ‘the gateway to self-driving vehicle development in the UK’. In terms of future development projects, Moshon Data is now leading the way in new ISO projects for stationary roadside targets. We believe that it is the quality and diversity of our products that has largely contributed to our success as a business.

## Imparting knowledge

In addition to being world-leading target manufacturers, we offer a range of expert training and consultancy services. ISO accredited, we are considered experts within our field and are representatives for the British Standards Institute. Indeed, imparting knowledge is at the very heart of our ethos and something that we feel passionately about. Working closely with the world’s leading car manufacturers, Euro NCAP partners and tier one suppliers, we are proud to travel internationally and impart our expertise.

Moshon Data Night Environment Simulation Tunnel



Pop-up Moshon Village consisting of inflatable buildings, foam kerbs and pavements, 3D cars and roadside obstacles



Here at Moshon Data, we understand the importance of building strong, lasting business relationships. At present, we currently have 20 representatives worldwide, working in six of the world's seven continents and as we continue to expand, we will endeavour to further build upon our connections. As a result of these efforts, we are proud to showcase our innovations across the continents.

## Growth and expansion

It is hard to believe that until very recently all of this had been accomplished from my family home in Witney, Oxfordshire. It was, of course, sometimes challenging, but we all worked together to make it a success. As a result, we recently moved the business into large premises which better suit the company's needs operationally. The new working environment boasts an expanse of office space, conference room and sizeable workshop, all of which make the day-to-day running of the business more streamlined.

The new premises are a long-term investment and meet the needs for future expansion. In 2019, we welcomed three more employees to join the Moshon Data team and have further plans to increase our workforce. Indeed, it is an exciting time for us; we are lucky enough to be in a position where we are able to give back to our community and invest in the next generation of engineers and data analysts. In contact with local universities, we hope to offer an apprenticeship scheme, an initiative which has long been encouraged by successive UK governments.

## Moving forward

As we progress, there are likely to be many challenges ahead, some more complex than others. One issue which I find both disappointing and concerning, is the lack of government investment in current-day vehicle autonomy. While significant funding is heavily invested into futuristic autonomous



Auto emergency brake testing being carried out on vulnerable road user (Moshon Data child pedestrian)

technologies such as self-driving vehicles, there is comparatively less government funding and interest when it comes to AEB. Indeed, a striking example of this is pedestrian collision avoidance systems (PCAS); on today's market it's possible to purchase a car that will brake automatically if a child were to run out in front of it. This ponders the question as to why. Could it simply be that more capital is invested into systems which only seek to improve the user experience and that the notion of the external safety of vulnerable road users (VRU) is somewhat less enthralling? While it is difficult to identify exactly why this is, there is no doubt that more funding and awareness in this area, which focuses on current safety aspects of vehicle autonomy, would only help to prevent collision accidents and in turn lower fatalities.

Brexit, notwithstanding, is yet another looming concern. As a company, we are yet to feel the full impact that Brexit will have on the day-to-day running of the business. However, by working together as a team, we are confident that we can adapt and overcome many of the challenges that it will bring.

What we do know, is that we will endeavour to take our environmental responsibilities seriously and continue to work closely with local business and suppliers in an attempt to reduce our carbon footprint. Recently switching to zero landfill waste collections, we are continuing to develop new ways to ensure that Moshon Data always remain environmentally conscientious.

“In contact with local universities, we hope to offer an apprenticeship scheme, an initiative which has long been encouraged by successive UK governments”

## The virus that changed the world

'This isn't the end today but it's very much a road map that takes us to the end and takes us on a one-way journey. The crocus of hope is poking through the frost and spring is on its way both literally and metaphorically.'

At some point in late 2019 or early 2020, an airborne virus originating in China arrived in the UK. In a short space of time, it would change British politics, and public life, beyond recognition.

On March 23 the prime minister addressed the nation to make an unprecedented announcement. The British public would henceforth be allowed to leave their homes for limited reasons, including food shopping, exercise once per day, medical need and travelling for work when necessary.

All shops selling non-essential goods were closed, gatherings of more than two people in public were banned, events including weddings, but excluding funerals, were cancelled. Britons abroad were told to return home while they could.

From the government's perspective, this announcement seemed inconceivable as little as eleven days previously. But, according to *The Sunday Times*, a meeting that took place on the evening of Thursday March 12 was to 'change British society for a generation.'

This was when the Strategic Advisory Group of Experts [Sage], examined the Covid-19 modelling from experts at Imperial College London and other institutions. This modelling predicted that there could be more than half a million deaths in the UK if no action were taken.



Prime Minister Boris Johnson chairs a Covid-19 update press conference

Just over a week before, on March 3, a jovial Mr Johnson's effort to allay fears would come back to haunt him. He said: 'I was at a hospital where there were a few coronavirus patients, and I shook hands with everybody'.

But, on March 13, the day after the game-changing Sage meeting, he was having serious discussions about a full shutdown of the economy and withdrawing the freedoms so many of us hold dear.

On March 16, in his first daily press conference to the nation, the prime minister called on people to avoid pubs, clubs and theatres, alongside all non-essential contact and travel. The following day, the NHS cancelled all non-emergency surgery, and chancellor Rishi Sunak unveiled a package of financial measures, including loans worth £330 billion, to help businesses through the crisis.



On March 18, with daily Covid deaths up to 104, schools across the UK were ordered to close to all pupils except those of key workers.

The next day, according to *The Sunday Times*, the prime minister's chief adviser Dominic Cummings reconvened the team that helped win the general election. 'Isaac Levido, the Tory campaign director, went to No 10, with former Vote Leave hands

Paul Stephenson and Henry de Zoete on a video conference call. Together they devised a slogan "Stay home. Protect our NHS. Save lives."

This slogan was unveiled on March 20, the same day Mr Johnson ordered pubs and restaurants across the country to close, with cinemas, nightclubs, theatres, gyms and leisure centres also told to shut their doors. Three days later, a full nationwide lockdown was in place.

## Covid deaths pass 1,000 per day as prime minister taken ill



The prime minister was cared for at St Thomas' Hospital after falling ill with Covid-19

With so many companies unable to operate, and others having to do so on a vastly reduced scale, the government unveiled its coronavirus Job Retention Scheme.

The scheme included a commitment to cover 80 per cent of the wages of staff not working, up to £2,500 a month. On March 24, chancellor Rishi Sunak told the House of Commons that it was 'the most comprehensive and generous suite of interventions of any major developed country in the world.'

The next day, the 'Coronavirus Bill' cleared the Lords without amendment, giving the government sweeping emergency powers to tackle Covid-19.

As Parliament and the country at large were getting used to this new era of government control over our lives, the daily deaths from Covid-19 continued rising.

At 8pm on March 26, the nation took part in the first of ten weekly 'clap for carers' sessions, during which millions of Britons stood on their doorsteps applauding the efforts of frontline care workers in the NHS and elsewhere. The following day, as daily deaths reached 288, it was announced that the prime minister had contracted the virus. Appearing at the daily press conference, Cabinet Office minister Michael Gove said, 'The fact that the virus is no respecter of individuals, whoever they are, is one of the reasons why we do need to have strict social distancing measures so that we can reduce the rate of infection and reduce the pressure on the NHS.'

On April 6, it was announced that Mr Johnson was being taken to hospital after suffering 'persistent symptoms.' The next day, he was admitted to intensive care with foreign secretary Dominic Raab leading the government in his absence. 'The government's business will continue,' said Mr Raab, 'and the prime minister is in safe hands with that brilliant team at St Thomas' hospital.'

On April 12, Mr Johnson was released from intensive care. Paying tribute to the NHS workers who had helped save his life, he said, 'It is thanks to that courage, that devotion, that duty and that love that our NHS has been unbeatable.'

On April 16, Mr Raab, still deputising for the prime minister while he recuperated, announced that lockdown

measures would be extended for at least three more weeks. Five days later, daily deaths hit 1,224, the highest number recorded during this period.

On the final day of April, with that figure down to 634, Mr Johnson led his first Downing Street press conference since being hospitalised. He said the country was now 'past the peak of this disease.'

## Vaccinations begin as Christmas is 'cancelled'

With over one-million lab-confirmed UK cases of Covid since the beginning of the pandemic, the country was once again told to stay at home and all non-essential shops and hospitality settings were closed. This was followed with a commitment to extend the Job Retention Scheme until the end of March.

There was good news on November 24, with the UK government and devolved administrations announcing that families would be able to meet over the Christmas period. On December 2, England's second national lockdown ended, and the tier system returned. However, this was accompanied by significant rebellion from 55 backbench Tories who voted against the measures, believing that they were too strict.

Speaking in the Commons, chairman of the influential 1922 Committee, Sir Graham Brady said, 'Freedom is not an absolute, but it should be regarded as precious. If the government are to take away fundamental liberties from the people whom we represent, they must demonstrate beyond question that they are acting in a way that is both proportionate and absolutely necessary. Today, I believe the government have failed to make that compelling case.'



Boris Johnson watches on as a nurse is vaccinated against Covid-19

On December 3, the UK formally approved the Pfizer vaccine with the first doses administered on December 8. After a year of dizzying drama, it was rather appropriate that the second person to receive the vaccine was called William Shakespeare.

But on December 14, the spirit of optimism was again punctured by the revelation that a new strain of Covid-19 had been identified in southern England, which seemed to be spreading more rapidly than the original. This was accompanied by a sharp rise in cases across the south east, which led to tough restrictions in London, parts of Essex and Hertfordshire. Three days

later, they were joined by Bedfordshire, Buckinghamshire, Berkshire, Peterborough, Hertfordshire, most of Surrey, Hastings and Portsmouth, Gosport and Havant in Hampshire. This meant that 68 per cent of the population of England were under the toughest level of the three-tiered system.

By December 19, things were significantly worse. With cases and deaths climbing rapidly, the

government moved 18 million people into a hitherto non-existent Tier 4, with rules as tough as the previous national lockdown. The prime minister also announced that for these people, the 'stay at home' order would apply over Christmas, and the rest of the country would only be allowed to meet on Christmas Day itself. This was also the case in Scotland, Wales and Northern Ireland.

## Historic Brexit deal agreed but tensions persist



Prime Minister Boris Johnson signs the post-Brexit Trade Deal at Downing Street

Having formally left the European Union on January 31, most political commentators expected our trade negotiations with the bloc to dominate headlines. Yet, after four years in the spotlight, Brexit had to become accustomed to playing second fiddle. It did, nonetheless, maintain its reputation for high drama.

Our departure from the EU meant the beginning of the 11-month transition period, running to December 31, during which most arrangements would remain the same. If no deal was reached during this window, UK-EU trade would default to World Trade Organisation terms.

On March 2, the UK's chief Brexit negotiator David Frost met his EU counterpart Michel Barnier in Brussels for the first formal meeting of the transition period. Three days later, Mr Barnier warned there were 'grave' differences in the UK and the EU's respective visions.

The next meeting, due to be held in London, was scrapped amid the Covid outbreak. Mr Johnson's hospitalisation meant that it was not until April 20 that both parties resumed talks via video link. The key issues under discussion were the future trading relationship, security policy, trade rules and the totemic issue of fishing rights.

The talks concluded with Mr Barnier accusing the UK of 'running down the clock' in an attempt to force through a no-deal Brexit.

After further talks on May 15, Mr Frost revealed that 'very little progress' was made and claimed that a far-reaching trade agreement would not be possible 'without major difficulties.' He followed this up with a letter to Brussels accusing Mr Barnier of treating the UK as an 'unworthy' partner. Mr Barnier responded by saying he was 'exhausted' by the UK's approach to the talks.





EU Commission President  
Ursula von der Leyen

June brought more fall outs, with the issue of fishing quotas proving contentious. The month ended with the passing of the deadline for the UK to formally apply for an extension to the transition period, meaning that any deal would have to be reached in the next six months.

However, on August 21 such a prospect seemed more remote than ever. The long-standing disagreement over lorry drivers' rights showed no sign of resolution, and Mr Barnier stated that a deal was 'unlikely.'

On September 7 Mr Johnson delivered an ultimatum to the EU: if a trade deal had not been agreed by October 15, Britain would walk away without one. He also prepared to bring the UK Internal Markets Bill before Parliament, which sought to 'eliminate the legal force of parts of the Withdrawal Agreement.'

The following day, amid much acrimony in Brussels, Brandon Lewis, secretary of state for Northern Ireland, informed Parliament that, by introducing the legislation, the UK

government would 'break international law in a very specific and limited way.'

The EU responded by threatening legal proceedings, while the European Commission put out a statement declaring that the UK had 'seriously damaged trust'. European Commission president Ursula von der Leyen confirmed on October 1 that the bloc would proceed with legal action against the UK.

One week later, European Council president Charles Michel said it was time for the UK 'to put its cards on the table' over a trade deal. This was followed by French president Emmanuel Macron insisting that the UK must back down over fishing rights to secure a deal, a development which 'startled' Downing Street. On October 16, Mr Johnson told the nation it was time to 'get ready' for no deal.

'The trade talks are over,' he said, 'the EU have effectively ended them yesterday when they said they did not want to change their negotiating position.'

## Former Vote Leave director makes exit



Mr Cummings, who masterminded the Brexit campaign in 2016, quit as the PM's advisor amid fierce infighting

It is a rarity in modern day politics for a full year to pass without the departure of a significant government minister. And yet, as *The Parliamentary Review* goes to print, the cabinet looks much as it did this time twelve months ago.

It is also the case in modern day politics that, for good or ill, the chief advisers to prime ministers tend to have a greater influence over the governance of the country than most secretaries of state. Dominic Cummings, an outlier in so many other ways, was no exception. On November 13, 2020, after a highly controversial one year and four months at Boris Johnson's side, his exit from Downing Street constituted the biggest political departure of the year.

Having served as Michael Gove's special adviser from 2007 to 2014, Mr Cummings first rose to national prominence during the 2016 EU referendum where he directed the Vote Leave campaign. So significant was his role that Benedict Cumberbatch was later cast to play him in a film.

Three years after the referendum, his appointment as chief adviser by

Mr Johnson was celebrated by some and criticised by others. Lord Kerslake, the former Civil Service chief, said it would 'bring trepidation into No 10 and more widely in the Civil Service.'

He was particularly unpopular with certain Tory MPs, given his previous comments, where he referred to the pro-Brexit European Research Group as a 'metastasising tumour' and claimed that Tory MPs 'largely do not care about poorer people.'

The role he played in securing a large majority in the December 2019 general election helped keep his critics at bay for five short months.

On May 25, Mr Cummings became the first chief adviser in history to give his own press conference. Speaking from Downing Street's rose garden, he sought to explain why he had taken a 260-mile drive during the first Covid lockdown, which included the now infamous detour to Barnard Castle and invited numerous calls for him to go.

'I know that millions have endured awful hardship, including personal tragedies, over the past few months, and people are suffering every day. And I know the British people hate the idea of unfairness,' said Mr Cummings. 'I believe that in all circumstances I behaved reasonably and legally, balancing the safety of my family and the extreme situation in No.10 and the public interest in effective government to which I could contribute.'

This was sufficient for Mr Johnson who resisted pressure to sack his right-hand man. However, there was a general feeling that Mr Cummings's days were now numbered.

Less than six months later, he was on his way out.

## England striker achieves his goals

It certainly wasn't the strangest thing that happened last year. But the prime minister making a personal phone call to a Premier League footballer to explain a change in government policy was still peculiar.

On June 16 it was Manchester United and England forward Marcus Rashford who took the call. Boris Johnson wanted to thank him for the campaign he had been running for schoolchildren to receive meal vouchers over the summer holidays.

Since closing schools in March, the government had been providing £15-a-week vouchers for all children who would normally have been eligible for free school meals. Mr Rashford and others argued that this scheme should be extended to cover the six-week summer holidays, given the additional financial burden many families were facing as a result of the pandemic. The government initially refused to do so but, with several Conservative MPs threatening to rebel, they changed their mind. A new £120 million 'Covid summer fund' was duly announced for 1.3 million pupils in England.

'I don't even know what to say,' tweeted Rashford, 'Just look at what we can do when we come together, THIS is England in 2020.'

Addressing the House of Commons after the fund was announced, education secretary Gavin Williamson said, 'We must remember that free school meals are not about providing financial support for families; they are there to support a child's education. Receiving a healthy, nourishing meal is a critical way of helping a child to focus and to learn in school. It helps to enable a child to fulfil their potential, which is essential if we want to break the cycle



Footballer and campaigner Marcus Rashford has helped drive government policy on school meals

of poverty from which far too many children right across the country suffer.'

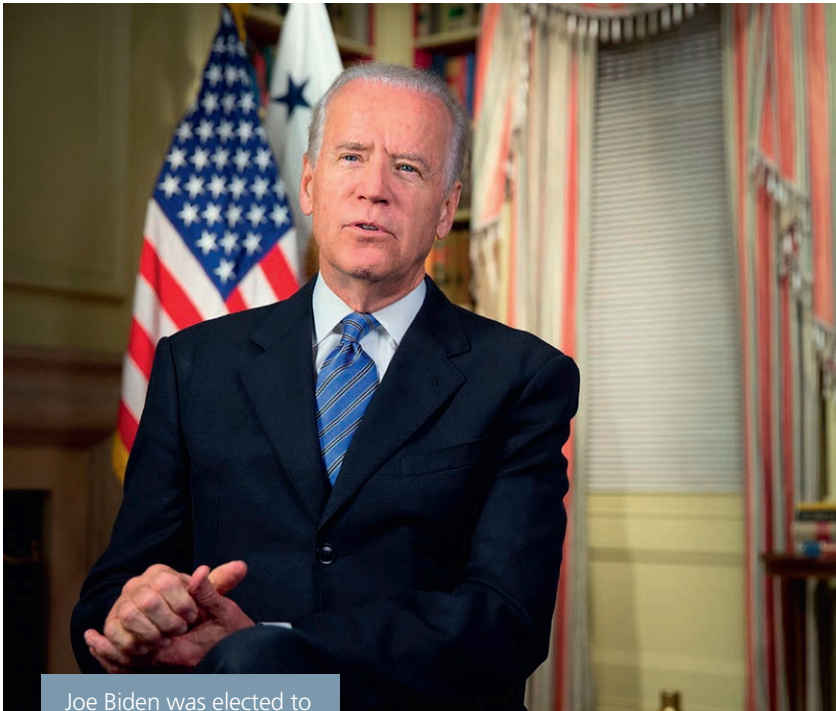
'As a [Manchester] United fan, it has been a pleasure to see so many people united from across the football family and well beyond, taking a powerful stand for children,' said Labour MP Mike Amesbury. 'He is a change maker, striking his political goal of feeding 1.3 million children this summer—Marcus Rashford one, prime minister Johnson nil.'

However, this was not the end of the story. In January, pictures circulated of poor-quality food parcels being sent out to families who were receiving parcels rather than vouchers. The CEO of Chartwells, one of the firms behind the parcels, had previously said, 'Marcus Rashford's campaign shines a much-needed spotlight on the issue of child food poverty.'

In response to the images, Mr Rashford, who had established the Child Food Poverty Taskforce, held talks with Chartwells and expressed his concerns about the food being provided. Writing on Twitter, Rashford said, 'We must do better. Children shouldn't be going hungry on the basis that we aren't communicating or being transparent with plans. That is unacceptable.'



## Prime minister hopes for positive relations with new US president



Joe Biden was elected to be the 46th president of the United States after the most chaotic and controversial election in American history

On January 20, Joe Biden became the 46<sup>th</sup> president of the United States of America.

It was, owing to the Covid pandemic, one of the most low-key inaugurations in living memory and did not reflect its significance.

The election of November 3 saw the biggest voter turnout in history, with the victor's 81.3 million votes the largest ever secured by a presidential candidate. Donald Trump, who became the first president since Nixon not to attend his successor's inauguration, refused to accept the outcome. He went on to mount more than fifty legal challenges across the country but was unable to overturn a single result.

On January 6, President Trump held a 'Save America' rally, which led to hundreds of his supporters storming the US Capitol in what Amanda Holpuch in the Guardian described as the most serious attack on the building since the 'burning of Washington'

by the British Army during the War of 1812.

'This is America's day,' said the new president two weeks later, 'This is democracy's day. A day of history and hope. Of renewal and resolve. Through a crucible for the ages America has been tested anew and America has risen to the challenge. Today, we celebrate the triumph not of a candidate, but of a cause, the cause of democracy. The will of the people has been heard and the will of the people has been heeded.'

On the same day in the House of Commons, the speaker Sir Lindsay Hoyle led the house in wishing the new president and vice-president, Kamala Harris, well.

The prime minister echoed the speaker's comments, before adding, 'I said when I spoke with him on his election as President that I looked forward to working with him and his new Administration, strengthening the partnership between our countries, and working on our shared priorities for tackling climate change, building back better from the pandemic, and strengthening our transatlantic security.'

Leader of the opposition, Sir Keir Starmer, called the inauguration 'a victory for hope over hate, and a real moment for optimism in the US and around the world.'

In terms of his hopes for what he and President Biden can achieve on the world stage, Mr Johnson said, 'This country is embarking on a quite phenomenal year. We have the G7 and COP 26, and we have already led the world with the Gavi summit for

global vaccination, raising \$8.8 billion. The UK is the first major country in the world to set a target of net zero carbon emissions by 2050—all other countries are following, and we hope

that President Biden will join us. We are working to promote global free trade, and of course we will work with President Biden to secure the transatlantic alliance and NATO.'

## The last word

In last year's last word, we described 2019 as the latest in a long line of chaotic years in British politics.

We went on to state that 'it was our job to review the year in parliament, rather than make predictions' but that we 'will break the habit and confidently forecast that 2020 will be the least chaotic year in British history for aeons.'

Our reasoning was that the nation's exit from the EU had been secured and that there was now a large parliamentary majority for a single party for the first time since 2010.

Quite clearly, we did not see Covid coming. Within six weeks of going to print, the country had entered a national lockdown. The prime minister was ordering us all to stay in our homes. Large swathes of the economy were shut down altogether. And the nature of our country, and the world, had changed beyond all recognition.

There was, however, one part of last year's last word that was not complete bunkum. We stated that, even if our prediction of a quiet year proved to be incorrect, 'the nation's businesses and organisations, such as those you have read about in this publication, will carry on regardless.'

Over the past twelve months, this notion has been tested to the full. And, against impossible odds, they have kept doing everything they can to keep themselves, and the country at large, going.



Lord Blunkett delivers a speech at *The Parliamentary Review* gala reception

There is still a long way to go, and it seems inevitable that many fantastic organisations will be lost along the way. But the spirit we have seen from the best practice representatives you have read about in this publication fills us with immense hope for the future.

You will be pleased to know that *The Parliamentary Review* will not be making any predictions for the year ahead. But, despite a chastening year, our faith in the strength and ingenuity of this nations' businesses and organisations remains as strong as ever.

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