Integrated County Strategy Evidence Base

Introduction to Essex Research Paper
August 2010

Produced by the ICS Working Group on behalf of the Essex Chief Executives Association

This document investigates, through a range of questions, how Greater Essex performs in relation to the rest of the country in 20 topics that could influence economic growth. The topics range from the national ranking of Essex shopping centres, to the number of moorings in Essex, to ranking the national importance of Greater Essex in key growth sectors. This document collates existing publicly available information to identify some key strengths and weaknesses in Greater Essex.

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1. Essex business environment

a) Key multinational and leading-edge companies located in Essex

Invest Essex proposed a group of companies which have a strong presence in Essex. The companies are:

- GlaxoSmithKline
- Pearson Education
- Nortel
- Raytheon
- E2V Technology
- BAE Systems
- Selex Communications
- Flaktwoods
- Ford
- Konika Minolta
- New Holland
- Olympus

Invest Essex identified a collection of important companies in Essex, listed by sector. Note that this listing does not fully consider all possible criteria that could be included.

Transport & Logistics

- Harwich International Port - One of the UK's leading multi-purpose freight and passenger ports. Member of the Hutchison Port Holdings Group
- BAA - Stansted is UK's 3rd busiest airport. Over 30 airlines serving 165 destinations across 35 countries
- DP World - Developing major new port facility - London Gateway
- Uniserve - UK’s largest independent freight forwarder. Door-to-door logistics throughout the world, worldwide warehousing, finance and environmental logistics
- Stobart - Operators of Southend Airport

Advanced Manufacturing

- New Holland Agriculture - World leader in agricultural and construction equipment
- Ford - Major R&D Centre focusing on next generation and low carbon engine technologies
- Alphasense - Sensor technology development and manufacturing
- Visteon - Leading supplier to global auto manufacturers. Chelmsford is global centre of excellence for driver information, audio and entertainment, plus development of interiors and climate products
- Flakt Woods - Energy-efficient air climate products, air treatment and fan solutions for buildings & infrastructure applications
- Ipeco (at Southend Airport) - Flight deck & cabin interior equipment for aircraft, and power management & machined components for defence electronics and engineering industries
- Proctor & Gamble - Large manufacturing plant in Thurrock.
- Olympus Keymed - Development and manufacture of market-leading specialised medical ancillary products and industrial equipment for distribution worldwide

Electronics/ICT

- Selex Communications and Selex Galileo - Defence and homeland security electronics (Actually 2 companies, but grouped here for convenience)
- e2v technologies - Global leader in specialised components and subsystems for medical, science, aerospace, defence and industrial applications
- BAE Systems - Global defence, security and aerospace company. R&D facility at Chelmsford
- Raytheon Systems - Technology and innovation leader specialising in defence, national security and commercial markets around the world.
- CML Microsystems - Global player in design, manufacture and marketing of integrated circuits for wireless and wireline communications, data storage and networking.

Pharmaceuticals & BioTech

- GSK - World leading research-based pharmaceutical and healthcare company
- Illumina (Chesterford Research Park) - Develops and manufactures technology to enable researchers to gather, process, and analyse genetic information used to study the causes of disease.

Construction

- Higgins Construction - One of South East's largest privately-owned construction companies. Builds or refurbishes homes throughout Essex, London and the Home Counties.

Food & Beverages

- Britvic - Supplier of leading branded soft drinks

Finance & Business Services

- IFDS - Leading supplier of investor record keeping services and systems to UK and European financial services companies (Also has a Chelmsford satellite location)
- First Data International - Leader in information commerce technology. In Basildon provides payment processing services to major financial services providers
- Marsh UK Ltd - Leading provider of risk and insurance products and solutions
- Royal Bank of Scotland - Back office services

Retail

- Capital Shopping Centres (Operators of Lakeside Shopping Centre)

Other infrastructure companies, not necessarily Essex-based, but influential on the economy

- Land Securities
- Countryside Properties
- National Express
- Essex & Suffolk Water
- EDF Energy

The Invest Essex website provides case study information on influential companies in Essex, and provides background information on why they are important. The following background information was provided in the case studies:

- **BAE Systems** is a global defence, security and aerospace company. The company has approximately 105,000 employees worldwide, with sales in excess of £18.5 billion in 2008. The group's Technology and Engineering Services (TES), based in Chelmsford, provides a research and development facility that delivers innovation, technology and future capability for BAE Systems and its joint venture partners, as well as for external clients like the Ministry of Defence, European Space Agency, Selex and the Department of Trade and Industry.

- **BioFocus DPI**, based at Chesterford Research Park near Saffron Walden, is the leading contract research organisation in the UK for drug discovery and one of the top five laboratories in this field in the world.

- **Coast Digital**, based at Colchester in Essex, is a successful full-service digital marketing agency. They were ranked 11th among Britain's fastest-growing private technology companies in 2008, and have been achieving national recognition for several years.

- **E2V technologies**, based in Chelmsford, is a global leader in specialised components and subsystems for innovative solutions in medical, science, aerospace, defence and industrial applications.

- **EC Group**, based at Grays, is one of the country's largest fulfilment houses – a company providing a range of services that enable businesses to handle responses to their marketing and promotional campaigns.

- **Ford**, based at four locations in Essex, has been Britain's best-selling car brand for over 30 years, and its commercial vehicles have been market leaders since 1965. The company currently sells around 440,000 cars and commercial vehicles each year. Essex plays an important part in Ford's operations with 9000 of the company's 13,000 UK employees based in the county. The UK head office at Brentwood is responsible for marketing, sales and service of the Ford vehicle range, and the Dunton Technical Centre, near Basildon, leads on engine, transmission and complete commercial vehicle development for all future European products.

- **GlaxoSmithKline** is one of the world's leading research-based pharmaceutical and healthcare companies. Based at Harlow, the centre has been carrying out research since the 1950s and is the home for 2,500 scientists and support staff whose focus is on early-stage neuroscience research.

- **Hunter Scientific** is an acknowledged leader in the specialised field of equipment for IVF treatment. The company manufactures its own range of high-quality micro tools for IVF laboratories and acts as a distributor for a variety of manufacturers of equipment for the IVF field. Essex and the area around Saffron Walden is home to many businesses in the pharmaceutical and life sciences field and the company is able to draw on a pool of local people with suitable skills to maintain its high standard and market position.

- **JW Froehlich UK**, based at Dunton in Essex, is one of the world's leading providers of innovative engine test solutions and is a strategic supplier to the world's major automotive manufacturers and engine makers, including Ford, GM, Chrysler, Toyota, Nissan and Perkins.

- **SELEX Galileo**, with UK headquarters at Basildon in Essex, is a world leader in surveillance, protection, tracking, targeting, navigation, and control and imaging systems. It provides integrated sensor solutions and throughlife capability management for defence systems and homeland security applications for customers in the UK, Europe and US civil avionics and defence markets. The site at Basildon is the headquarters for SELEX Sensors and Airborne Systems UK, where more than 1000 people are involved in the design and development of missile seekers, cooled and uncooled thermal imaging systems, radiofrequency (RF) equipment, civil communications equipment, stabilised platforms and optical assemblies for defence and homeland security platforms.

- **Uniserve Group**, with its headquarters at Tilbury in Essex employing 400 staff, is the UK's largest independent freight forwarder, offering clients full door-to-door logistics throughout the world, as well as a range of value-added services from worldwide warehousing to finance and environmental logistics.

- **Wilkin and Sons**, based at Tiptree in Essex, is famous throughout the world for its range of high-quality jams and marmalades, which are exported to more than 65 countries. The company has annual sales of around £20 million, has seen revenue rising annually for more than ten years, and employs 200 regular staff

- **MultipartyTalk Ltd**, based in Colchester, is an innovative mobile phone technology which launched its groundbreaking product in early 2007 with a licence agreement with one of the largest telecoms companies in the Far East.

- **AND Technology Research**, based in Theydon Bois, specialises in the use of microcontrollers and microprocessors to develop concepts into practical, cost-effective, market-leading products and has won numerous awards for enterprise, technology and innovation.
- **Clement Clarke International (CCI)**, part of the Hagg-Streit group, is based in Harlow, and has produced asthma management products for more than 50 years. CCI's "Mini-Wright" Peak Flow Meter, first launched in 1976, is recognised as "The Gold Standard" for measuring expiratory flow and is just part of the company's growing portfolio of solutions for screening, monitoring and treating a wide range of respiratory conditions.

- **Configure One Europe**, based in Harlow, is the European subsidiary of its US parent and is responsible for marketing 'CONCEPT', Configure One's enterprise configuration software. CONCEPT is an innovative modular software suite that enables companies to design and manufacture quote customised products quickly and easily. The software increases efficiency, reduces costs and improves lead-times to the customer with a return on investment in just 6-8 months.

- **Parasol Panel Systems**, based at Harlow, manufactures modular panels used in the construction of external walls for residential properties, animal kennels and games rooms. The company's innovative panel design has superior thermal insulation characteristics and can significantly reduce heating bills when used to upgrade the exterior walls of "park homes", mobile and static homes with an external surface that is traditionally hard to insulate.

- **VRCC**, a veterinary referral cancer and critical care centre based in Basildon, Essex, provides pet owners and veterinary surgeons with specialist oncological surgery, chemotherapy and radiotherapy. The practice has made a significant investment in sophisticated technology systems making it the most advanced private centre for the treatment of cancer in dogs and cats in Europe. VRCC is the only private practice with its own Linear Accelerator (LINAC) on-site, and is also the first in the UK to be able to offer a Canine Melanoma Vaccine. VRCC is a £2m business with over 40 staff, offering the best veterinary cancer treatment outside the USA.

b) How Essex companies rate in national rankings

Fast Track is an organisation that researches UK companies, and produces a group of league tables annually using 7 categories. The 2009 / 2010 Fast Track 100 company rankings include the following Essex companies within each of the categories:

- The Sunday Times HSBC International Track 100 - **private companies with the fastest-growing international sales**:
  - Ranked 58 - LFF Group, an oil equipment supplier

- The Sunday Times Deloitte Top Track 100 – **biggest private companies (based on sales)**:
  - Ranked 66 - Martin McColl, convenience store operator

- The Sunday Times Pricewaterhousecoopers Profit Track 100 – **private companies with the fastest-growing profits**:
  - Ranked 38 - Waymade Healthcare, pharmaceuticals company based in Basildon
  - Ranked 39 – Rainham Industrial Services, industrial services provider based in Tilbury
  - Ranked 65 - Maxxima, recruitment consultancy based at Shenfield

- The Sunday Times Deloitte Buyout Track 100 - **private equity-backed companies with the fastest-growing profits**:
  - Ranked 27 – Healthcare Homes, a care-home operator
  - Ranked 44 - Inchcape Shipping Services, a marine services provider

- The Sunday Times Virgin Fast Track 100 - **fastest growing UK private companies**:
  - Ranked 61 - Toppesfield, road sufacer, based in Halstead
  - Ranked 91 – Manpower Direct, security services provider. The company has grown 59.3 per cent, with sales having risen to £7.4m.

- The Sunday Times HSBC Top Track 250 – **biggest mid market companies in UK**:

- Ranked 22 – Countryside Properties, property developer based in Brentwood
- Ranked 62 – David Lloyd Leisure, health club operator based at Hatfield
- Ranked 81 – Apollo Property Services Group, property services provider

- The Sunday Times Microsoft Tech Track 100 – **fastest growing technology companies in the UK:**
  - Ranked 25 – Coast Digital, online marketer based in Colchester
  - Ranked 55 – NEG Telecom, telecoms service provider working with doctors' surgeries to prioritise calls based on patients level of risk

The 2010 update due to be published in September for the 100 Fastest Growing UK Private Companies include the following Essex based companies:

- Ranked 5 – Writtle Holdings, based in Benfleet, is an investment and management services company. Under chairman Robert Essex, turnover has jumped from just £516,000 in 2006 to £28m in 2009.
- Ranked 61 – Manpower Direct, security services provider. The company has grown 59.3 per cent, with sales having risen to £7.4m.

2. Relationship to London

a) What 'world city' functions are available in London? What does London offer?

The following information is taken from the adopted and draft replacement London Plan, to identify why London can be considered a world city, and what facilities in London help to maintain it as a world city.

What makes London a world city? The London Plan states that London is:

- One of the three world financial centres, Europe's financial capital, and the world's most economically internationalised city
- The largest city in the European Union
- Status as capital, seat of Government and legal centre
- International transport connections
- A city which has the important advantage that its main language, English, is as close to an international language as exists in the world today
- A gateway to the rest of the UK for business and leisure, and accounts for 75% of all international arrivals
- A centre of e-business related activities in the UK, with many world-class companies from overseas establishing their European headquarters and associated activities in the capital. Clusters of e-businesses are located in west and central London (Soho, Clerkenwell, Hammersmith, Fulham and Kensington). Software businesses and larger companies tend to locate in west London around Heathrow, Uxbridge and Richmond.
- One of a very small number of command and control centres in the increasingly interactive network of transactions across the world economy.

World city facilities that London can offer:

- World city airports that provide excellent connectivity by air
- World city port capacity
- World class higher education and specialist research institutions
- A number of internationally important cultural institutions, including museums, galleries, and theatres, which are among London's major tourist attractions.
    - These facilities are located within a number of Strategic Cultural Areas, and include Greenwich Riverside, Wembley, the South Kensington museums complex, the Barbican, the South Bank/Bankside, West End/Soho/Covent Garden, 'Theatreland' and 'London's Arcadia' covering strategic heritage sites in West London.
- A night-time economy that contributes to London's world city status, including bars, restaurants, performing arts venues, cinemas, and nightclubs located in and around the Covent Garden / Soho areas
- Architectural history of national importance, and World Heritage Sites at Greenwich Maritime, Kew Gardens, Palace of Westminster and Tower of London
- World class stadium facilities at Wembley and world class sporting facilities as a legacy of the Olympic games
- Financial, media, and business services north of the Isle of Dogs and Canary Wharf that form a significant part of London's world city offer
- London is ranked 1st in the Experian top 25 European shopping destinations based on catchment spend of comparison good in the 'downtown area' (Experian, 2009)

b) How many Essex residents work in London?

- 19% of residents in Greater Essex commute to London for employment
- Epping Forest and Brentwood have the largest amount of workers that commute to London
- Around a quarter of the commuters to London work in the City of London
- See appendix 1 for complete figures

Travel to work flows between Essex and London, 2001

	Percentage of:				
	Residents that live and work in same district	Residents that work in Greater London	Residents that work in the City of London	Residents that work in Tower Hamlets	Residents that work in Westminster
Basildon	55	24	6	3	2
Braintree	57	10	3	1	1
Brentwood	45	36	8	3	3
Castle Point	38	20	6	2	2
Chelmsford	59	17	5	2	2
Colchester	71	7	2	1	1
Epping Forest	38	45	6	4	5
Harlow	62	14	2	1	1
Maldon	52	11	3	1	1
Rochford	36	18	6	2	2
Southend-on-Sea	62	15	5	2	2
Tendring	67	5	1	0	1
Thurrock	57	28	5	3	3
Uttlesford	55	13	3	1	2
Greater Essex	56	19	5	2	2
London	93	93	6	4	12

Souce: Census 2001, on Nomis

3. Universities, colleges and schools in Essex

a) University league table rankings for Essex based universities

Information from the Sunday Times 2010 University Guide, Southampton and Oxford are added for comparison with the highest and lowest ranking universities.

Rank	University	Student satisfaction (250)	Heads / Peer Assessment (100)	Research quality (200)	A Level / Higher Points (200)	Unemployment (100)	Firsts / 2:1's awarded (100)	Student / Staff ratio (100)	Dropout rate (variable)	Total
1	University of Oxford	208	71	148	250	78	91	92	4	943
46	University of Essex	163	34	139	149	50	61	73	-9	660
111	Anglia Ruskin University	121	16	52	126	54	56	51	-29	446
122	Southampton Solent University	134	13	19	104	45	46	47	-6	400

Information from the Complete University Guide (www.thecompleteuniversityguide.co.uk) 2011 university league table. Oxford and South Bank are added for comparison with the highest and lowest ranking universities.

Rank	Institution	Student satisfaction	Research Assessment	Entry Standards	Student Staff Ratio	Academic services spend	Facilities spend	Good honours	Graduate prospects	Completion
1	University of Oxford	4.1	3.5	532.0	10.8	2,909	469	91.8	82.8	98
37	University of Essex	3.9	3.2	311.0	13.9	1,127	442	58.3	60.2	87
106	Anglia Ruskin University	3.6	2.2	254.0	19.8	784	205	55.4	58.5	76
114	London South Bank University	3.8	2.3	192.0	24.4	793	165	45.8	58.5	66

Background information on the universities and colleges in Essex (EEDA):

<u>Anglia Ruskin University</u>
With over 25,500 students, Anglia Ruskin University is one of the largest universities in the East of England, and a major provider of part-time education. Anglia Ruskin University contributes actively to the economic strength of the region by supporting the growth and success of businesses, particularly small and medium sized companies. ARU has recently established an undergraduate course in enterprise and entrepreneurship.

<u>University of Essex</u>
Areas of expertise include software engineering, robotics, telecommunications, biomolecular sciences, biotechnology, environmental biology and sustainable development, sports science, sociology and economics. The newly-created Essex Business School brings together the Schools of Accounting, Finance and Management and Entrepreneurship and Business.

<u>Writtle College</u>
Renowned for its specialist land-based and "green" environmental curriculum, Writtle College has a diverse knowledge base from business to equine and from science to sport, as well as horticulture and agriculture. Clients range from the World Bank to major supermarket chains to local SMEs.

b) How important is Writtle Agricultural College?

The Guardian University Guide 2009-10 includes a specialist institution table for colleges that offer one or two subjects, but do not compete with universities across a broad range of subjects. Writtle Colleges ranking is shown below, Harper Adams UC and the Royal Agricultural College are added for comparison as the only other colleges in the list that offer agricultural courses.

Rank	Institution	Guardian Score	Satisfied overall (%)	Satisfied with teaching (%)	Staisfied with feedback (%)	Student staff ratio	Spend per student (FTE)	Average entry tariff	Value added score /10
18	Harper Adams UC	54.9	93	90	72	21	4	291	4.0
29	Writtle College	46.7	72	79	67	5	10	238	4.0
32	Royal Agricultural College	41.1	81	79	64	22	3.81	281	2.2

c) Specialist schools

Examples of specialist schools in Essex identified by Invest Essex include:

- Hassenbrook School, a specialist technology college, the only school in the UK with an i-Lab (innovation laboratory) designed to encourage students to think creatively, develop ideas, brainstorm and work in teams to take ideas forward.

- Chelmer Valley High School, one of a number of specialist schools in Essex, has set up a specialist engineering department and has strong links with industry and universities to give students a clear, practical insight into business.

- Greensward College, an award-winning specialist technology college, offers students a wide range of entrepreneurial vocational courses and has also established an enterprise centre for students setting up in business.

4. Ranking of shopping centres

Experian ranking of retail centres 2009

Centre	**2008 Ranking**	**2009 Ranking**	**2014 Ranking**	**2019 Ranking**
London	1	1	1	1
Glasgow	2	2	2	2
Birmingham	3	3	3	3
Manchester	4	4	4	4
Liverpool	5	5	6	7
Cardiff	10	6	5	8
Nottingham	6	7	7	6
Leeds	7	8	8	5
Edinburgh	8	9	9	9
Bluewater	9	10	11	11
Newcastle upon-Tyne	12	11	10	10
Norwich	13	12	12	12
Bristol	14	13	14	16
Southampton	15	14	13	13
Leicester	16	15	16	16

The Experian conventional ranking system rates centres is based on variety and quality of retailers. The 2014 and 2019 forecasts are based on expected retail growth and proposed retail development.

There is no national ranking of shopping centres based on retail turnover. The table below has been produced mainly using information from a GVA Lakeside Basin Single Issue Review study, and shows the retail turnover of centres in and around Essex.

Forecast Retail Turnover Comparison Goods				
Retail location	**Forecast Turnover 2009 Base Position**	**Forecast turnover 2019**	**Total Increase**	**Percentage Increase**
Colchester*	577,900	950,600	372,700	39.2
Romford	555,861	785,396	229,535	29.2
Lakeside	529,850	734,777	204,927	27.9
Chelmsford	486,899	720,156	233,257	32.4
Southend-on-Sea	426,162	628,143	201,981	32.2
Ilford	425,288	593,397	168,109	28.3
Basildon	423,326	624,046	200,720	32.2
Lakeside Retail Warehousing	363,162	530,868	167,706	31.6
Grays	353,975	54,998	-298,977	-543.6
Harlow	305,878	451,768	145,890	32.3
Bexleyheath	242,517	363,208	120,691	33.2
Walthamstow	219,163	311,045	91,882	29.5
Dartford	168,879	253,064	84,185	33.3
Stratford	160,579	873,220	712,641	81.6
Braintree (inc Outlet)*	146,660	223,210	76,550	34.3
Clacton-on-Sea*	125,450	203,000	77,550	38.2
Brentwood	67,200	96,033	28,833	30.0
Rayleigh	57,555	84,710	27,155	32.1
Loughton	41,457	59,976	18,519	30.9
Maldon*	34,700	54,050	19,350	35.8
Saffron Waldon**	34,280			
Canvey Island	31,725	46,403	14,678	31.6
Billericay	23,758	34,412	10,654	31.0
Wickford	10,939	16,243	5,304	32.7
Great Dunmow**	7,280			

Sources:
Lakeside Basin SIR Study, GVA Grimley, March 2009
North Essex Retail Study, GVA Grimley, 2006
Uttlesford Retail Study, Hepher Dixon, 2005
Notes:
*Estimates based on projections from the North Essex Retail Study
**2003 figures from Uttlesford Retail
Study

5. Coastal features of Essex

a) What is the unique quality of the Essex coastline?

The following text from the Essex Green Infrastructure study describes the Essex coastline:

- The Essex coast is recognised as one of the most important for wildlife in the UK, with significant areas protected by national and international designations, mainly due to the large numbers of wildfowl and wading birds using the coast and estuaries. (p7)
- The Essex coast is extremely diverse in nature, varying from a largely open rural landscape with numerous historic and archaeological features, to the more heavily built up environment which exists around Harwich Port and Clacton.
- The Essex coast is of international and national importance for nature conservation and includes many designated sites including a Special Area for Conservation, Special Protection Areas, Ramsar Sites, Sites of Special Scientific Interest and National Nature Reserves. It is also a highly valued water and land based resource providing opportunities for recreation, tourism, agriculture, shellfisheries and many other forms of employment.
- Essex has 350 miles of coastline, 1 Area of Outstanding Natural Beauty, and 4 Blue Flag Beaches (Essex Green Infrastructure study, 2009, p9)
  - Blue flag beaches include Dovercourt Bay, Harwich; Martello Bay, Clacton on Sea; Brightlingsea Beach, Brightlingsea; East Beach, Shoeburyness

The following text is from the Visit Essex website ‘coastal delights’ section, providing a description of the key qualities of the Essex coastline:

- With more than 350 miles the Essex coast is the longest of any English county. It is a most diverse coastline offering a variety of fun and enjoyment: traditional English seaside resorts at Southend-on-Sea, Clacton-on-Sea and Walton-on-the-Naze; historic maritime towns such as Harwich, Maldon and Leigh-on-Sea; sailing centres at Burnham-on-Crouch, Brightlingsea and Mersea Island; and miles and miles of remote and unspoiled coastline important for wildlife.
- World's longest pleasure pier at Southend-on-Sea
- Visit Leigh-on-Sea where the cockle boats can still be seen unloading their daily catch
- Clacton-on-Sea and Walton-on-the-Naze offer seaside resorts and events such as the Clacton air show, summer art trails, music festivals and carnivals
- Frinton-on-Sea has a promenade walk past the colourful beach huts.
- Cliff top walks along the Tendring coast, often referred to as the Essex Sunshine Coast, offer panoramic views of the Walton backwaters and National Nature Reserve.
- In the sea port of Harwich, Essex maritime history at Harwich, including the Lighthouses, the Treadwheel Crane, the Lifeboat Museum, the Ha'Penny Pier, the house of Christopher Jones, Master of the Mayflower and the Old Custom House's.
- Maldon and nearby Mersea Island have collectively been described as the ‘New Brittany' and Burnham-on-Crouch as the ‘Cowes of the East'.
- During the summer season the Essex shores and coastal towns come alive with the colourful sails of the boats cruising to their first regatta

- Bounded by the river Blackwater to the north, the North Sea to the east and the river Crouch to the south, the Dengie is an oasis from the modern world, where Essex weather boarded cottages jostle with historic inns and life is just a heartbeat slower.

b) What is the value of the seaside tourist industry in Essex?

The following information is taken from the Seaside Tourist Industry in England and Wales Study, 2010

Town	Population, 2007	Estimated average year round employment directly supported by seaside tourism, 2006/2008	Estimated share of employment directly supported by seaside tourism as % of jobs in tourist related sectors, 2006/2008	Estimated share of employment directly supported by seaside tourism as % of all jobs, 2006/2008	GVA directly attributable to the seaside tourist industry, 2007 (million)
Southend-on-Sea	159,900	3,400	19	4	67
Clacton	58,000	1,900	33	11	45
Harwich	19,800	600	33	10	16
Frinton / Walton	16,700	800	51	19	16
West Mersea	7,300	100	32	7	4
Other examples for comparison					
Greater Worthing	191,300	1,800	10	2	31
Great Yarmouth	58,300	5,600	51	16	116
Tynemouth	18,100	500	46	16	5
Mumbles	16,100	1,400	65	30	16
Seaton	7,300	400	57	21	6

- The level of employment in the seaside tourist industry in Southend is similar to areas such as Scarborough, Thanet, Weymouth, Eastbourne, Hastings/Blexhill, and Llandudno / Colwyn Bay / Conwy.
- While Southend-on-Sea has the largest concentration of seaside jobs in Essex, the smaller seaside towns such as Frinton / Walton have a greater dependence on this sector. This is a national pattern observed in the Seaside Tourist Industry study.
- In total Greater Essex has 6,900 year round jobs directly supported by seaside tourism. This is average in comparison to other county areas in England and Wales, as shown in the table in appendix 2.
  - 763,026 people are employed in Essex, therefore the level of employment associated to seaside tourist industry is 0.9% of the total in Essex.
- GVA output in Greater Essex directly attributable to the seaside tourist industry is £150 million, which is average in comparison to other counties in England and Wales, as shown the table in appendix 2.

Percentage of GVA directly attributable to the seaside tourist industry

County	GVA, 2007 (million)	GVA directly attributable to the seaside tourist industry, 2007 (million)	Percent of areas GVA directly attributable to the seaside tourist industry, 2007
Greater Essex	28,349	150	0.529%
Kent	23,114	180	0.778%
Lancashire	18,620	310	1.664%

(Seaside Tourist Industry in England and Wales Study, 2010, p54; Local Knowledge, ONS data)

The table below shows that the seaside tourist industry accounts for a small amount of the total GVA in Essex, and produces a lower percentage of total GVA output than other areas such as Kent and Lancashire. This would suggest that the seaside tourist industry has less value in Essex than other areas of the country.

6. Agricultural productivity

a) How does agricultural productivity in Essex compare to other areas?

Change in the agricultural sector, 1998 - 2001

Rank	Geography	Business change: agriculture (%) 1998-2008
1	Essex CC	-2.69
2	Kent CC	-4.73
3	Lancashire CC	-7.63
4	Southend-on-Sea	40
5	Suffolk	-6
6	Thurrock	0

Source: Local Knowledge; Business start-ups and closures: VAT registrations and deregistrations

- The agricultural sector in Essex reduce by 2.69% between 1998 - 2008, however as shown in the table above, the performance of the agricultural sector in Essex is better than other similar areas.
- Nationally (as shown in table 3 of appendix 4) Essex is within the top third best performing county and unitary agricultural sectors between 1998 - 2008, ranked 39 of 127.

Key features of agricultural production by county in 2009, and how Greater Essex ranks against other counties and unitaries in England

County	Total number of holdings	Total farmed area (ha)	Total permanent grass (ha)	Total arable farm land (ha)	Total horticultural farm land (ha)	Total livestock	Total labour
Peterborough	277	25 221	3 226	31118	188	248839.7	563
Cambridgeshire cc	3 652	241 616	23 494	302259	9 749	2058462	8 508
Norfolk	7 150	428 335	58 932	464317	15 380	16488227	14 410
Suffolk	5 335	298 474	35 684	336513	9 443	7956353	10 082
Luton	8	19	#	0	#	0	#
Bedfordshire cc	1 547	84 404	13 389	97653	1 082	733620.7	2 542
Hertfordshire	1 775	99 792	20 040	107843	186	495729.2	3 062
Greater Essex	**4722**	**256918**	**34326**	**300534**	**2 369**	**2723955**	**10162**
Kent cc	6 199	238 305	71 902	176698	13 101	506 205	16 287
Lancashire cc	7 126	221 004	137 886	43519	4 079	413 615	11 953
Greater Essex national rank (of 93 County / Unitary areas)	**17**	**12**	**32**	**6**	**15**	**19**	**12**

Source: Defra survey of agriculture and horticulture, June 2009

The table above shows that there is a large amount of farm holdings, farm land, livestock, and agriculturally based labour in Greater Essex, showing the importance of this sector in the County. In comparison to other areas, Greater Essex contains the 12th largest amount of farmed land, and 17th largest amount of farm holdings within in a county or unitary council area.

To attempt to provide an idea of the productivity of agricultural land in Greater Essex, the amount of permanent grass (i.e not farmed) area in Greater Essex is relatively low considering the size of the County. This could suggest a high level of agricultural productivity in Greater Essex.

b) Is arable farming conducted in Essex?

The table above identifies that Essex has the sixth highest amount of arable land within a county or unitary boundary in England. Appendix 3 provides a breakdown of the amount of arable farming in Essex, and shows the amount in other areas for comparison. When ranked by land used for arable crops within county and unitary boundaries, in 2009 Essex had the 2nd highest amount of farming land for field beans and linseed, the 3rd highest for wheat and peas, and was within the top ten areas for winter barley, sugar beef, and oil seed rape.

c) Are there any specialised agricultural processes conducted in Essex?

- Greater Essex has 56 specialist pig farms, which is the 18th highest amount for a county or unitary in England
- Greater Essex has 170 specialist poultry farms, which is the 15th highest amount for a county or unitary in England

(Defra agriculture and horticulture survey, June 2009)

- There is no further information on any other specialised farming conducted in Essex

7. Sailing and water recreation in Essex

a) Number of moorings in Essex

Number of sailing facilities, by historic county area, 2010

Historic County (inc unitaries) or region	Number of marina's	Number of walk-ashore berths
Hampshire	41	9386
Sussex	12	4531
Devon	16	3496
Dorset	11	2957
Essex	11	2846
Kent	15	2487
Suffolk	10	2115
North West	10	2104
North East	8	1897
Cornwall	9	1217
Norfolk	8	1073
Gloucestershire	2	700
London	5	638
Somerset	3	450
Lincolnshire	1	50

Source: Pracitcal Boat Owner wesite, www.pbo.co.uk/marina-guide

b) Compare Essex to the rest of the country, particularly the Solent area

- The table above shows the Solent area, which consists of the Hampshire coast near the Isle of Wight, has the largest collection of berths and marina's in the country.
- Essex has the 5th largest number of berths and 6th largest number of marina's within a county area in England

Participation in sailing, Sport England Survey, 2005/6

Name	Population Mid-2005 (Over 16)	% Sailing	Total number sailing
Hampshire and Isle of Wight	1471700	1.1%	16100
Greater London	6068700	0.2%	14200
Devon	915500	0.8%	7000
Sussex	1241100	0.6%	7000
Kent	1295400	0.4%	5000
Essex	1322900	0.4%	4700
Dorset	581000	0.7%	4100
Surrey	867700	0.5%	3900
Cornwall and Isles of Scilly	427500	0.9%	3800
Hertfordshire	834200	0.3%	2600
Lancashire	1154900	0.2%	2600
Northamptonshire	518600	0.4%	2200
England	**40710900**	**0.3%**	**141400**

Source: Sport England, Active People Survey, 2005/6

- A Sport England participation in sport survey shows similar results to the marina and berths data. Essex has the 6th highest amount of residents that participate in sailing compared to other county areas in England.
- Essex has a slightly higher percentage of the population that participate in sailing compared to the national average.

8. Wind power and renewable energy generation in Essex

a) What is the UK offshore capacity for wind generation?

There are currently 12 operational offshore wind farms in the UK, which produce 1,041.2 MW. There is a large amount of proposed offshore wind farm schemes across the UK that in total could produce a further 46,285.2 MW of energy. The following table provides a breakdown of the current and proposed offshore wind farm capacity of the UK.

Status	Number of wind farms	Turbines	MW
Operational	12	336	1,041.2
Under Construction	5	409	1,452.6
Approved	7	817	2,619.6
Submitted (S36)	5	519	2,260.0
Sites awarded	1	?	1200 (estimated)
Planned demonstration offshore wind farm	1	?	115 (estimated)
Planned Scottish Territorial Waters offshore wind farms	10	?	6,438 (estimated)
Planned round 3 offshore wind zones	9	?	32,200 (estimated)

Source: Renewable UK (http://www.bwea.com/ukwed/offshore.asp)

The largest future wind farm proposals in the UK involves 9 offshore wind zones that are proposed to provided 32,200 MW of electricity. Norfolk Bank is located close to Essex, and is proposed to be the second largest zone providing 7,200 MW. The map left shows the location of these zones:

Source: BBC news website, 2010

Statistics from the 4C Offshore Limited offshore wind farm database shows that the UK currently has the largest MW capability from existing and developing offshore wind farms in the world. The UK also has the largest proposed development of wind farms in the world, with a potential future offshore wind farm capability of 45,392 MW from sites current at the concept, submitted, or approved stage. (See appendix 5 for full listing)

Ranking of countries by MW capability of proposed offshore wind farms

Rank	Country	Proposed wind farm development by MW capability
1	United Kingdom	45492
2	United States	44209
3	Germany	32151
4	Brazil	11200
5	Canada	9530
6	Norway	9296
7	Spain	8692
8	Italy	8128
9	Sweden	7621
10	Denmark	6779
11	Finland	5992
12	China	5943
13	Greece	5906
14	France	5887
15	Netherlands	4807
16	Ireland	2894
17	Belgium	1545

Source: 4COffshore ltd (www.4coffshore.com)

Ranking of countries by MW capability from operational offshore wind farms and sites under construction

Rank	Country	MW capability of existing offshore wind farms
1	United Kingdom	2331
2	Denmark	863
3	Germany	520
4	Netherlands	247
5	Belgium	195
6	Sweden	149
7	Italy	92
8	China	47
9	Finland	30
10	Ireland	25
11	Japan	25
12	Norway	2

Source: 4COffshore ltd (www.4coffshore.com)

b) How does Essex compare to the rest of the world in terms of wind generation?

The East of England currently has the second highest wind farm MW output capability in the UK. The region is proposed to have the third highest growth in wind farm output capacity in the UK, and remain the second highest area for wind farm MW capability in the UK.

UK offshore wind farm capacity

Region	MW from operational offshore wind farms	MW from proposed offshore wind farms	Total future capacity (MW)
East Midlands	194.4	1200	1394.4
East of England	232.8	11009	11241.8
North East	4	630	634
North Wales	150	576	726
North West	360	1317.2	1677.2
South East	90	900	990
South		900	900
South West		1500	1500
Scotland	10	11053	11063
Irish Sea		4200	4200
North Sea		13000	13000

Source: Renewable UK
(http://www.bwea.com/ukwed/offshore.asp)

The East of England currently has 3 operational offshore wind farm sites, including two located off the Essex coast:

- Gunfleet Sands 1, 7km off Clacton-on-Sea, 30 turbines, 108 MW, DONG Energy
- Gunfleet Sands 2, 8.5km off Clacton-on-Sea, 18 turbines, 64.8 MW, DONG Energy
- Scroby Sands, 3km NE Great Yarmouth, 30 turbines, 60 MW, E.ON UK Renewables

The East of England has 9 proposed offshore wind farms along its coast, including two located off the Essex coast:

- London Array 1, 24km off Clacton-on-Sea, 175 turbines, 630 MW, DONG Energy / E.On Renewables / Masdar
- London Array 2, 24km off Clacton-on-Sea, 166 turbines, 370 MW, DONG Energy / E.On Renewables / Masdar
- Greater Gabbard, 26km off Orford, Norfolk, 140 turbines, 504 MW, Scottish and Southern
- Sheringham Shoal, Greater Wash, 88 turbines, 315 MW, Scira Offshore Energy Ltd,
- Lincolnshire, 8km off Skegness, 75 turbines, 270 MW, Centrica/ DONG & Siemens Project Ventures
- Docking Shoal, 14km off North Norfolk Coast, 100 turbines, 540 MW, Centrica Renewable Energy Ltd
- Dudgeon, 32km north of Norfolk, 168 turbines, 560 MW, Warwick Energy
- Race Bank, 27km from North Norfolk coast, 88 turbines, 620 MW, Centrica Renewable Energy Ltd
- Norfolk Bank, 7200 MW, East Anglia Offshore Wind Ltd (Scottish Power Renewables and Vattenfall)

Including the two proposed London Array sites, the future wind farm capability of the Essex coast could total 1,172.8 MW. Currently Essex provides 74.2% of the offshore wind farm capability for the East of England, and 7.4% of the UK total. Proposed offshore wind farm development will reduce the impact of Essex on the regional or national total, where Essex would provide 7.4% of the total East of England offshore wind farm MW capability, and 2.5% of the national output.

9. Key features of Essex from the East of England Forecasting Model

a) Summary of the economic forecasts for Essex, comparing the Essex economy to East of England and Cambridge

i) Sectors where Essex has more GVA than Cambridge, but not the highest in the East of England:

- Agriculture and fishing (£m)

	2008	2009	2010	2011	2012
Cambridgeshire	227.6	227.6	228.3	231.3	234.5
Essex, Southend & Thurrock	258.6	257.1	256.7	258.7	261.1

- Manufacturing – food, drink, and tobacco (£m)

	2008	2009	2010	2011	2012
Cambridgeshire	240.4	229.8	230.8	235.6	239.8
Essex, Southend & Thurrock	273.2	263.5	266.9	274.9	282.4

- Utilities

	2008	2009	2010	2011	2012
Cambridgeshire	107.4	109.8	113.3	117.9	123.3
Essex, Southend & Thurrock	336.4	348.9	364.3	383.3	404.9

- Communications

	2008	2009	2010	2011	2012
Cambridgeshire	176.3	172.5	179.8	194.8	207.3
Essex, Southend & Thurrock	711.4	677.3	687.0	725.0	751.1

- Business services – computer related

	2008	2009	2010	2011	2012
Cambridgeshire	363.3	363.6	366.7	380.3	400.4
Essex, Southend & Thurrock	424.2	430.2	439.4	461.3	491.6

- Business services – labour recruitment, security and cleaning

	2008	2009	2010	2011	2012
Cambridgeshire	159.1	157.8	158.0	162.6	172.3
Essex, Southend & Thurrock	416.8	419.4	418.7	430.7	457.3

- Business services – other including call centres

	2008	2009	2010	2011	2012
Cambridgeshire	159.2	160.4	159.5	163.1	171.5
Essex, Southend & Thurrock	302.3	302.6	298.9	303.5	317.0

- Business services - real estate and renting

	2008	2009	2010	2011	2012
Cambridgeshire	1024.9	947.1	912.9	913.9	945.5
Essex, Southend & Thurrock	2200.6	2089.8	2035.7	2059.0	2154.0

- Business service – other tradable

	2008	2009	2010	2011	2012
Cambridgeshire	489.7	489.2	494.6	513.5	548.1
Essex, Southend & Thurrock	880.5	877.7	870.3	887.2	930.9

ii) Sectors where Essex has the highest GVA in the East of England:

- Manufacturing – other low tech (£m)

	2008	2009	2010	2011	2012
EAST	**2340.6**	**2094.5**	**2062.6**	**2085.1**	**2098.6**
Cambridgeshire	324.2	292.0	289.4	294.4	298.2
Essex, Southend & Thurrock	724.8	644.2	629.7	631.6	630.7
Hertfordshire	402.9	361.1	356.6	361.9	365.8
Norfolk	283.8	255.7	253.2	257.3	260.2
Suffolk	297.4	268.4	266.3	271.2	274.7
Bedfordshire & Luton	176.3	158.0	155.9	158.1	159.6

- Manufacturing – Metals and engineering

	2008	2009	2010	2011	2012
EAST	**5374.0**	**4651.7**	**4588.6**	**4783.7**	**5016.5**
Cambridgeshire	679.0	595.9	596.0	629.8	669.4
Essex, Southend & Thurrock	1612.7	1391.2	1367.7	1420.8	1484.6
Hertfordshire	880.7	759.4	746.5	775.8	811.3
Norfolk	677.9	591.8	588.8	618.9	654.3
Suffolk	472.0	411.6	408.9	429.2	453.0
Bedfordshire & Luton	701.0	598.1	581.5	597.2	616.9

- Manufacturing – Chemicals and process industries

	2008	2009	2010	2011	2012
EAST	**2615.1**	**2357.1**	**2395.6**	**2483.8**	**2548.9**
Cambridgeshire	377.5	338.6	342.3	353.0	360.4
Essex, Southend & Thurrock	686.3	623.8	639.1	667.8	690.6
Hertfordshire	559.8	502.4	508.6	525.3	537.0
Norfolk	413.6	374.0	381.1	396.1	407.5
Suffolk	287.0	258.8	263.0	272.7	279.8
Bedfordshire & Luton	251.3	225.5	228.4	236.1	241.6

- Manufacturing – Other and recycling

	2008	2009	2010	2011	2012
EAST	**578.0**	**503.7**	**522.6**	**527.7**	**531.8**
Cambridgeshire	69.9	63.2	67.9	71.0	74.1
Essex, Southend & Thurrock	182.0	157.0	161.5	161.5	161.3
Hertfordshire	99.7	85.7	87.5	87.0	86.5
Norfolk	87.7	76.3	79.1	79.8	80.3
Suffolk	79.0	69.1	71.7	72.5	73.0
Bedfordshire & Luton	50.9	44.6	46.5	47.2	47.8

- Construction

	2008	2009	2010	2011	2012
EAST	**7643.7**	**6838.6**	**6715.9**	**6880.5**	**7175.9**
Cambridgeshire	694.5	610.5	598.9	615.4	645.3
Essex, Southend & Thurrock	2155.7	1924.4	1879.0	1914.8	1990.8
Hertfordshire	1859.9	1686.4	1663.6	1703.8	1766.5
Norfolk	904.0	805.5	798.7	828.8	876.4
Suffolk	918.4	820.2	806.1	827.0	864.3
Bedfordshire & Luton	956.4	855.5	838.5	858.8	897.3

- Wholesale, distribution and sale and maintenance of motor vehicles

	2008	2009	2010	2011	2012
EAST	**7424.6**	**7037.4**	**7014.9**	**7130.6**	**7396.2**
Cambridgeshire	686.1	651.0	657.8	678.4	713.7
Essex, Southend & Thurrock	1969.0	1875.5	1870.6	1902.2	1974.4
Hertfordshire	1914.6	1819.9	1810.8	1835.0	1898.4
Norfolk	892.8	832.5	828.2	842.4	873.6
Suffolk	690.0	656.8	659.3	674.6	703.3
Bedfordshire & Luton	1013.9	957.8	947.0	955.0	983.0

- Retailing

	2008	2009	2010	2011	2012
EAST	**6154.1**	**5797.7**	**5775.5**	**5880.1**	**6130.9**
Cambridgeshire	488.3	462.8	464.2	477.0	502.3
Essex, Southend & Thurrock	1921.0	1800.8	1786.3	1811.4	1881.3
Hertfordshire	1489.0	1411.9	1412.5	1439.8	1501.0
Norfolk	860.8	807.9	802.2	815.3	849.3
Suffolk	578.5	544.4	542.1	553.2	578.9
Bedfordshire & Luton	588.5	556.3	556.4	569.0	595.9

- Hotel and catering

	2008	2009	2010	2011	2012
EAST	**2547.3**	**2419.9**	**2426.7**	**2523.0**	**2645.6**
Cambridgeshire	243.2	233.5	236.7	249.2	264.7
Essex, Southend & Thurrock	722.8	684.2	683.7	708.0	739.4
Hertfordshire	549.5	522.5	524.3	545.1	571.3
Norfolk	411.3	388.8	388.1	402.1	420.7

Suffolk	313.2	297.6	298.7	310.4	325.2
Bedfordshire & Luton	241.2	230.4	232.3	242.8	255.9

- Air transport

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**566.7**	**545.9**	**556.3**	**593.2**	**628.2**
Cambridgeshire	0.1	0.1	0.1	0.1	0.0
Essex, Southend & Thurrock	196.7	188.5	191.2	202.9	214.1
Hertfordshire	7.0	6.6	6.7	7.0	7.3
Norfolk	17.2	16.7	17.2	18.5	19.8
Suffolk	0.0	0.0	0.0	0.0	0.0
Bedfordshire & Luton	345.6	333.9	341.1	364.7	387.0

- Land and other transport

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**4075.7**	**3989.4**	**4086.2**	**4257.6**	**4404.9**
Cambridgeshire	290.1	281.3	290.9	307.2	321.7
Essex, Southend & Thurrock	1309.1	1280.0	1305.8	1357.2	1400.9
Hertfordshire	693.8	679.4	693.8	722.0	745.9
Norfolk	424.8	408.5	416.7	433.8	447.9
Suffolk	637.5	631.4	653.4	681.0	706.2
Bedfordshire & Luton	550.2	542.1	555.7	579.9	600.6

- Water transport

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**729.9**	**709.8**	**720.1**	**737.8**	**748.4**
Cambridgeshire	5.2	5.1	5.4	5.7	6.0
Essex, Southend & Thurrock	301.1	297.9	307.4	320.1	330.0
Hertfordshire	11.9	11.3	11.3	11.4	11.4
Norfolk	90.4	82.3	78.2	75.1	71.2
Suffolk	304.6	297.2	302.1	309.8	314.1
Bedfordshire & Luton	15.8	15.0	14.9	14.9	14.8

- Finance

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**4960.4**	**5041.9**	**5135.7**	**5330.3**	**5680.4**
Cambridgeshire	243.1	250.7	262.6	279.9	306.8
Essex, Southend & Thurrock	1348.2	1360.8	1377.3	1426.0	1522.0
Hertfordshire	1185.2	1197.2	1208.2	1246.4	1326.8
Norfolk	834.1	853.6	880.4	918.5	972.6
Suffolk	542.2	558.5	575.2	598.7	633.8
Bedfordshire & Luton	272.8	278.4	282.8	293.5	314.1

- Public admin

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**3547.2**	**3495.7**	**3528.9**	**3574.7**	**3612.1**
Cambridgeshire	440.5	436.4	443.5	453.0	461.6
Essex, Southend & Thurrock	876.7	864.9	873.3	883.5	891.4

Hertfordshire	562.4	552.3	556.1	562.0	566.3
Norfolk	542.3	537.3	543.7	551.2	557.8
Suffolk	539.7	525.0	523.5	525.3	526.1
Bedfordshire & Luton	411.0	407.5	414.3	422.7	430.1

- Education

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**5323.7**	**5305.2**	**5409.2**	**5465.2**	**5526.4**
Cambridgeshire	878.4	880.6	903.4	918.0	933.3
Essex, Southend & Thurrock	1302.7	1294.6	1317.9	1328.9	1340.9
Hertfordshire	1097.0	1089.4	1108.2	1116.7	1125.7
Norfolk	649.7	650.2	660.7	665.7	671.8
Suffolk	559.2	556.0	566.3	572.9	580.5
Bedfordshire & Luton	673.5	672.1	687.1	696.0	705.5

- Health

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**6428.8**	**6533.8**	**6753.5**	**6925.4**	**7124.2**
Cambridgeshire	819.7	861.5	894.0	920.3	944.9
Essex, Southend & Thurrock	1785.0	1806.2	1866.5	1912.4	1966.8
Hertfordshire	1061.0	1075.8	1115.0	1145.9	1181.8
Norfolk	1095.5	1106.2	1140.2	1166.3	1198.7
Suffolk	790.8	799.1	824.9	846.6	873.1

- Other personal services

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**3888.1**	**3919.6**	**4014.7**	**4139.0**	**4292.0**
Cambridgeshire	372.7	377.3	388.4	403.0	420.6
Essex, Southend & Thurrock	1084.2	1084.9	1103.4	1128.6	1161.0
Hertfordshire	841.4	848.8	870.4	898.1	931.8
Norfolk	502.4	507.3	520.5	538.1	559.9
Suffolk	518.3	525.4	540.0	558.6	581.0

- Other personal services – waste services

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**349.3**	**353.5**	**362.3**	**375.2**	**392.1**
Cambridgeshire	42.7	41.9	41.7	41.9	42.4
Essex, Southend & Thurrock	111.7	111.4	112.7	115.3	119.3
Hertfordshire	77.9	84.7	92.4	101.3	111.5
Norfolk	39.9	39.5	39.7	40.2	41.0
Suffolk	28.8	28.4	28.4	28.6	29.1

- Ownership of dwellings

	2008	**2009**	**2010**	**2011**	**2012**
EAST	**7417.8**	**7130.3**	**7174.4**	**7344.1**	**7588.6**
Cambridgeshire	788.6	761.8	770.9	793.6	824.6
Essex, Southend & Thurrock	2110.1	2027.5	2037.8	2083.5	2150.3
Hertfordshire	1689.9	1623.9	1632.4	1668.6	1721.8
Norfolk	840.5	807.9	813.4	833.8	862.8

Suffolk	797.3	765.3	770.5	789.9	817.3

- Total GVA

	2008	2009	2010	2011	2012
EAST	**98302.6**	**94246.9**	**94515.4**	**96815.6**	**100328.4**
Cambridgeshire	10684.7	10293.4	10395.1	10715.5	11164.4
Essex, Southend & Thurrock	26331.9	25208.1	25272.4	25887.7	26833.1
Hertfordshire	21671.9	20826.7	20848.2	21334.1	22121.2
Norfolk	12584.2	12022.5	12073.4	12370.5	12805.8
Suffolk	11743.8	11278.5	11328.9	11597.5	11982.0

iii) Sectors where Cambridge has more GVA than Essex:

- Extraction (£m)

	2008	2009	2010	2011	2012
Cambridgeshire	14.4	12.8	12.8	13.1	13.4
Essex, Southend & Thurrock	14.0	11.8	11.2	10.7	10.3

- Business services – research and development, technical testing

	2008	2009	2010	2011	2012
Cambridgeshire	278.6	278.4	284.5	298.6	318.5
Essex, Southend & Thurrock	114.0	111.9	112.6	116.6	122.8

iv) Sectors where Essex has the lowest GVA in the East of England:

There were no sectors in the East of England Forecasting Model where Essex had the lowest GVA

b) Does economic growth in the UK match growth in Essex?

The sectors where Essex has the highest GVA in the East of England are manufacturing of other low tech, metals and engineering, chemicals and process industries, and other and recycling; construction; wholesale, distribution and sales and maintenance of motor vehicles; retailing; hotel and catering; air transport; land and other transport; water transport; finance; public admin; education; health; other personal services, waste services; ownership of dwellings; and total GVA.

Manufacturing is a large feature of GVA in Greater Essex, which is similar to national GVA as shown as shown in the table below. Transport GVA is high both nationally and in Greater Essex, as is education, health, retailing, hotels, public admin, and ownership of dwellings / real estate.

Financial intermediation features strongly in the national GVA percentage growth change table below, however this does not appear so prominently in Greater Essex. There is a greater range of manufacturing related GVA in Essex compared to the manufacturing identified nationally below.

Largest growth sectors in the UK by GVA growth between 1992-2003

Sector	Industry	% growth
Financial intermediation	Computer services	354
Manufacturing	Miscellaneous manufacturing nec & recycling	280
Financial intermediation	Market research, management consultancy	226
Financial intermediation	Other business services	222
Financial intermediation	Insurance and pension funds	221
Financial intermediation	Advertising	203
Financial intermediation	Owning and dealing in real estate	164
Other services	Recreational services	152
Financial intermediation	Auxiliary financial services	152
Financial intermediation	Legal activities	150
Financial intermediation	Renting of machinery etc	135
Education, health and social work	Social work activities	129
Manufacturing	Other food products	126
Other services	Other service activities	120
Manufacturing	Articles of concrete, stone etc	118
Other services	Sewage and sanitary services	118
Financial intermediation	Architectural activities and technical consultancy	118
Wholesale and retail trade	Hotels, catering, pubs etc	117
Financial intermediation	Accountancy services	117
Other services	Private households with employed persons	115

Source: ONS, 2005

GVA by sector in England, 2007

Sector	Amount of GVA (£m)
Real estate, renting and business activities	261 299
Manufacturing	129 303
Wholesale and retail trade (including motor trade)	122 601
Financial intermediation	92 794
Transport, storage and communication	76 424
Health and social work	72 009
Construction	67 387
Education	62 081
Other services	54 424
Public administration and defence	49 924
Hotels and restaurants	30 049
Electricity, gas and water supply	17 166
Agriculture, hunting, forestry & fishing	6 994
Other mining and quarrying	2 034
Mining and quarrying of energy producing materials	769

Source: ONS, 2007

10. Comparison to the Northern Way cities

a) How do economic features of Essex compare to the Northern Way cities

The Northern Way is organised into 8 city regions. The council areas within each region are as follows:

- Tyne and Wear city region, which includes the council areas of Gateshead, Newcastle, North Tyneside, South Tyneside, and Sunderland
- Tees Valley sub region, which includes the council areas of Hartlepool, Middlesbrough, Redcar and Cleveland, Stockton-on-Tees, and Darlington
- Hull and the Humber Ports city region, which includes the council areas of East Riding of Yorkshire, Kingston upon Hull, North East Lincolnshire, and North Lincolnshire
- Leeds city region, which includes the council areas of Leeds, Bradford, Calderdale, Kirklees, Wakefield, Selby, York, Harrogate, Craven, and Barnsley
- Manchester area, with information collected for Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan, Cheshire East, Warrington, and High Peak
- Sheffield city region, which includes Sheffield, Doncaster, Rotherham, Barnsley, Bassetlaw, Chesterfield, North East Derbyshire, and Derbyshire Dales councils
- Liverpool / Merseyside city region, which includes Knowsley, Liverpool, St Helens, Sefton, Wirral, Halton, Cheshire West and Chester, and Warrington
- Central Lancashire city region, which includes Blackburn, Blackpool, Burnley, Chorley, Fylde, Hyndburn, Pendle, Preston, Ribble Valley, Rossendale, South Ribble, and Wyre

Economic features of Northern Way city regions, and comparison with Greater Essex

City Region	Resident population Sept 2009	Unemployment rate (%) May 2010 (2)	% of total employment in public services (wkpl) 2008 (3)	GVA (£million, workplace based) 2007	New business start up rate (%) 2009 (1)
Essex, Southend & Thurrock	1688400	3.4	25.6	28349	11.9
Tyne and Wear	841200	5.3	31.1	19735	12.4
Tees Valley	452900	6.1	31.5	9936	13.0
Hull and the Humber Ports	408300	5.6	28.9	14002	13.2
Leeds	1710700	3.9	26.3	50520	10.9
Manchester	2551200	4.3	26.1	59777	12.0
Sheffield	1079100	4.1	30.5	25733	10.3
Liverpool / Merseyside	1124400	5.0	29.5	32934	12.4
Central Lancashire	2074500	3.3	29.3	18690	11.1

Source: Local Futures; ONS

Notes:

(1)The percentage of businesses that have registered for VAT within the last year

(2) The proportion of people aged 16-59/64 (men/women) claiming Job Seekers Allowance or National Insurance Credits. The higher the score, the more unemployed in a given area.

(3) Workplace based figure provides the proportion of all employed persons working in Public Services. The "Public services" sector can be defined as: Public admin/defence; Education; Health and social work

Key observations from the table above:

- Greater Essex has a lower unemployment rate than all of the Northern Way city regions except Central Lancashire
- Greater Essex contains a lower amount of employment related to the public sector than the Northern Way cities
- Leeds, Manchester, and Liverpool have a higher GVA than Greater Essex
- 5 of the city regions have a higher rate of new business start up than Greater Essex

b) What kind of employment is located within the Northern Way cities, and how does this compare to Greater Essex?

c)

Analysis of employment in the Northern Way city regions, and comparison with Greater Essex

City Region	The proportion of workplace based employment in: (%, 2008)										
	Agricul-ture	Banking	Utilities	Knowledge driven sectors (1)	Public services	Retail	Creative (2)	Engin-eering	Manu-facturing	High-tech	R&D
Essex, Southend & Thurrock	1.1	3.1	0.2	22.2	25.6	19.8	7.1	1.5	9.7	1.5	0.4
Tyne and Wear	0.2	2.8	0.5	20.5	31.1	15.8	5.8	2.0	11.5	0.5	0.3
Tees Valley	0.3	2.1	0.9	19.5	31.5	15.6	4.5	1.1	12.0	0.2	0.7
Hull and the Humber Ports	1.3	1.3	0.5	17.4	28.9	17.4	4.2	2.0	17.1	0.2	0.1
Leeds	1.1	5.0	0.6	21.3	26.3	17.3	6.6	0.4	13.9	0.5	0.3
Manchester	0.5	2.9	0.2	21.4	26.1	18.0	6.5	0.9	12.5	0.6	0.4
Sheffield	1.0	1.8	0.4	15.6	30.5	16.8	5.3	0.7	14.6	0.6	0.1
Liverpool / Merseyside	0.5	3.4	0.2	22.2	29.5	16.7	5.6	1.3	10.6	0.5	0.3
Central Lancashire	0.9	1.7	0.2	19.3	29.3	17.2	5.5	4.7	17.7	0.4	0.1

Source: Local Futures; ONS

Notes:

(1) The proportion of all employed persons working in the following "Knowledge-driven" sectors: Aerospace, Electric machinery and optical equipment, Printing, publishing, recorded media, Chemicals, Energy, Telecomms, computer & related services, R&D, Finance, business services, Air transport services, & Recreational & cultural services.

(2) Proportion of employment in Creative Industries sector. The cultural/creative industries are defined according to the DCMS as the following sectors: Manufacture of knitted and crocheted hosiery, pullovers/cardigans, leather clothes, workwear, other outerwear, underwear, other wearing apparel and accessories and the dressing and dyeing of fur. Manufacture of footwear, Publishing of books, Publishing of newspapers, Publishing of journals and periodicals, Publishing of sound recordings, Other publishing, Reproduction of sound recording, Reproduction of video recording, Reproduction of computer media, Other retail sale in specialized stores, Retail sale of second-hand goods, Publishing of software, Other software consultancy and supply, Architectural/ engineering activities, Advertising Photographic activities, Other business activities NEC, Motion picture and video production, Motion picture and video distribution, Motion picture projection, Radio and television activities, Artistic and literary creation etc, Operation of arts facilities, Other entertainment categories NEC, News agency activities, and Other recreational activities NEC.

Key observations from the table above:

- Only Hull and the Humber Ports and Leeds and a higher or equal amount of agricultural employment in comparison to Greater Essex
- Essex has a higher proportion of knowledge driven sector employment than all of the Northern Way city regions except Liverpool, which has the same amount
- Greater Essex contains a lower amount of employment related to the public sector than the Northern Way cities

- Greater Essex contains a higher amount of creative and high-tech based employment than the city regions
- Greater Essex has less manufacturing based employment than the Northern Way cities

11. How Essex compares to other key growth areas, information from BIS

a) What are the key growth sectors in the UK?

Information from BIS (Department for Business Environment and Skills) publications 'New Industry, New Jobs', 'Partnerships for Growth', and 'Going for Growth: Our Future Prosperity' identify a number of sectors as being key for the future growth of the UK. This relates to what BIS anticipates will be the most influential sectors in the world, and what they consider the UK has the potential to deliver in the future. The following outlines the key growth sectors identified by BIS and some associated information within the publications.

Advanced manufacturing

- Advanced manufacturing using new industrial technologies is considered to be an area that the UK has strong capabilities. Key areas of manufacturing include:
    - In **aerospace**, engine and wing design and manufacture will have to adapt to the low carbon age. The UK also has a strong presence in manufacturing space innovation products, satellite operators, applications, and world-leading science.
    - The shift from metal to **composite** materials will provide vast commercial opportunities and will have important applications in the automotive, marine, aerospace, wind and wave, construction, oil and gas, and medical equipment sectors
    - In the **industrial biotechnology sector** the shift from a chemical industry based on oil to one based on renewable and biological substances will redefine chemical manufacture in the 21st century. It is considered that this could be as transformational for today's economy as oil was in the twentieth century.
    - Developing **plastic electronics** technology will enable electronic circuits to be printed cheaply onto flexible surfaces, something impossible with conventional silicon semiconductors and with a massive range of potential applications. Plastic electronics is forecast to rise to $120 billion globally by 2020.

Life sciences

- Life sciences include pharmaceutical, medical, biotechnology and medical technology companies. UK Life Sciences is a world leading, high-tech industry estimated to employ over 120,000 people and represents one of the UK's greatest strengths in research and development.
- Broad demographic changes could see a rise in demand for care, hospitality, and leisure sectors for elderly people, and particularly in relation to the development of drug treatments for age related illness.

Low carbon energy

- BIS suggests that the low carbon economy has the largest potential economic opportunity for the UK in the following areas:
    - offshore wind power; wave and tidal power; civil nuclear power; carbon capture and storage; ultra-low carbon vehicles; low carbon buildings and construction; low carbon aerospace; chemicals and industrial biotechnology; low carbon electronics, and information and communications technology; business and financial services; and carbon markets. (p49)
- In five years' time the low carbon and environmental goods and services sector in the UK could be worth as much as £150 billion

Creative and digital industries

- Future technological change will create growth for digital communications in vital network industries
- The UK has the largest creative sector in the EU

b) How does national growth sectors compare with business growth in Essex?

Section 1 above lists companies within a number of sectors in Essex. This information indicates that Greater Essex has a strong presence of advanced manufacturing companies, and also includes some important life sciences and creative and digital industry sector companies. Details of these are provided below:

Advanced manufacturing companies located in Essex include:

- New Holland Agriculture - World leader in agricultural and construction equipment
- Ford - Major R&D Centre focusing on next generation and low carbon engine technologies
- Alphasense - Sensor technology development and manufacturing
- Visteon - Leading supplier to global auto manufacturers. Chelmsford is global centre of excellence for driver information, audio and entertainment, plus development of interiors and climate products
- Flakt Woods - Energy-efficient air climate products, air treatment and fan solutions for buildings & infrastructure applications
- Ipeco (at Southend Airport) - Flight deck & cabin interior equipment for aircraft, and power management & machined components for defence electronics and engineering industries
- Proctor & Gamble - Large manufacturing plant in Thurrock.
- Olympus Keymed - Development and manufacture of market-leading specialised medical ancillary products and industrial equipment for distribution worldwide

Life sciences companies in Essex include:

- GSK - World leading research-based pharmaceutical and healthcare company
- Illumina (Chesterford Research Park) - Develops and manufactures technology to enable researchers to gather, process, and analyse genetic information used to study the causes of disease.

Creative and digital industry sector companies include:

- Selex Communications and Selex Galileo - Defence and homeland security electronics (Actually 2 companies, but grouped here for convenience)

- e2v technologies - Global leader in specialised components and subsystems for medical, science, aerospace, defence and industrial applications
- BAE Systems - Global defence, security and aerospace company. R&D facility at Chelmsford
- Raytheon Systems - Technology and innovation leader specialising in defence, national security and commercial markets around the world.
- CML Microsystems - Global player in design, manufacture and marketing of integrated circuits for wireless and wireline communications, data storage and networking.

There are no companies within section 1 that would be included within the low carbon energy sector. Section 8 above highlights that Essex contributes a large percentage of the UK's offshore wind power, and with Bradwell nuclear power station in Maldon, there is a strong presence of existing low carbon energy infrastructure in Greater Essex.

12. Specialist hospitals in Essex

In an article from 20th March 2008, The Independent created a list of the 10 best specialist hospitals in England. They are considered to be at the cutting edge of research and offer the highest standards of care for patients who require treatment in their specialist areas. All 10 of the best specialist hospitals identified are located in and around London. Other highly regarded specialist hospitals were identified in 11 other areas across the UK, including 4 in Liverpool and 3 in Manchester.

Although none of the identified specialist hospitals are located within Greater Essex, the county is within close proximity to 12 specialist hospitals, 10 in London, a specialist heart centre in Huntingdon, and a liver centre in Cambridge. The details of these facilities are outlined below;

<u>Bones and joints</u>

- Royal National Orthopaedic Hospital, Stanmore, North West London
  - The 220-bed hospital in Stanmore, north-west London, provides the most comprehensive range of care for joint and muscular problems in the country.
  - One fifth of all orthopaedic surgeons in the UK are trained at the hospital, which has eight operating theatres fitted with the latest equipment to perform complex neuromusculoskeletal procedures. The hospital treats almost 10,000 patients a year.
  - Specialist clinics deal with bone tumours, scoliosis (curvature of the spine), rheumatology, spinal injuries, specialist hand and shoulder conditions and sports injuries.
- Alternative specialist orthopaedic hospitals include the Royal Orthopaedic Hospital, Birmingham (rated "good" by the Healthcare Commission) and the Nuffield, Oxford.

<u>Brains</u>

- National Hospital for Neurology and Neurosurgery, Central London
  - Along with the nearby Institute of Neurology, it is major international centre for treatment, research and training.

- The National Hospital for Neurology and Neurosurgery has 200 beds at its central London site near Euston station, and treated more than 4,500 in-patients and 54,000 outpatients last year.
- Part of the University College London Hospitals Trust, it is also planning a new clinical neurosciences building at Queen's Square, which already boasts a state of the art neuro-rehabilitation unit.

- Walton Centre for Neurology and Neurosurgery at Fazakerley, Liverpool, the only specialist neurological NHS trust

<u>Hearts</u>

- Royal Brompton & Harefield NHS Trust, Chelsea, London
  - The largest specialist heart and lung centre in the UK
  - The trust attracts staff and patients from across the country and around the globe, and is a centre for research with between 500 and 600 papers published in scientific journals each year. Its 10 research programmes each received the highest rating in 2006.
  - Each year, surgeons perform 2,400 coronary angioplasties (where a balloon is threaded through an incision in the groin to the heart and expanded to widen a blocked artery), 1,200 coronary bypasses and 2,000 treatments for respiratory failure – so they do not lack for experience.
- Other specialist heart units with strong reputations are Papworth Hospital, Huntingdon, and the Cardiothoracic Centre, Liverpool, formed in 1991.

<u>Cancer</u>

- The Royal Marsden NHS Trust, Central London
  - The first dedicated cancer hospital in the world, founded in 1851, and is still considered the best.
  - With the Institute of Cancer Research, the Royal Marsden is the largest comprehensive cancer centre in Europe, seeing more than 40,000 patients from the UK and abroad each year. It has the highest income from private patients of any hospital in Britain, testifying to its international reputation.
- England has two other specialist cancer centres – the Christie Hospital in Manchester, and the Clatterbridge Centre for Oncology, near Liverpool.

<u>Ear, nose and throat</u>

- Royal National Throat, Nose and Ear Hospital, London
  - The country's largest ear, nose and throat hospital is also Europe's centre for audiological research, with an international reputation for its expertise and range of specialties, all on one site on London's Gray's Inn Road.
  - Its services range from minor procedures such as inserting grommets (tiny valves placed in the eardrum of a child to drain fluid from the middle ear) to major head and neck surgery.
  - A quarter of its 60,000 patients were referred from other parts of the UK and abroad last year.

<u>Bowel</u>

- St Marks Hospital, Harrow, west London
  - Britain's leading national and international referral centre for diseases of the bowel is the only hospital in the UK and one of only 14 worldwide to be

- Hope Hospital, Manchester also has a specialist bowel diseases unit.

Liver
- King's College hospital NHS Trust, south London
  - The liver unit at King's is the largest in the world. It is one of 31 specialist liver units in the UK, but none can match it for expertise, facilities or state of the art equipment. It offers investigation and treatment for all types of acute and chronic liver disease.
  - The unit performs 200 liver transplants a year, and more than 200 patients with liver failure are admitted to its intensive care unit each year.
- Other highly regarded major centres among the 31 specialist units are the Freeman Hospital in Newcastle upon Tyne; St James's University Hospital, Leeds; University Hospitals Leicester NHS Trust; Addenbrooke's Hospital, Cambridge; and Derriford Hospital, Plymouth.

Psychiatry
- The Maudsley Hospital, south London
  - It is a centre of excellence for the delivery mental-health care. Its addictions centre offers new treatments for drug abuse, alcoholism, eating disorders and smoking, it provides innovative care for disturbed children and adolescents and is the largest mental-health training institute in the country.
  - It has pioneered new approaches to the treatment of heroin addiction and its specialists have raised concerns over the link between cannabis and schizophrenia which have led the Government to review changes to the law.

Children
- Great Ormond Street Hospital NHS Trust, central London
  - It is the largest centre for research into childhood illness outside the US, the largest centre for children's cancer in Europe and delivers the widest range of specialist care of any children's hospital in the UK.
  - Great Ormond Street only accepts specialist referrals from other hospitals and community services – in order to ensure it receives the rare and complex cases and not the routine.
- Other commendable children's hospitals include Alder Hey, Liverpool, Manchester and Sheffield.

Eyes
- Moorfields Eye Hospital, London
  - The largest specialist eye hospital in the country and one of the largest in the world, Moorfields was founded in 1805.
  - It treats more patients than any other eye hospital or clinic in the UK and more than half the ophthalmologists practising in the UK have received specialist training at Moorfields.
  - The hospital carried out 23,000 ophthalmic operations last year, providing surgeons with extensive experience on which to hone their skills. The reputation of the trust is such that it has started to run clinics in distant hospitals, capitalising on its brand. The hospital employs 1,300 staff who work on 13 sites.

13. Essex ports

a) How important are Essex ports to the UK, particularly the Haven Gateway ports as a complex?

Appendix 6 provides the full listing tables for port statistics in the UK. The following information highlights where the Haven Gateway ports are within the top ten ports in the UK.

Total port traffic 2009, all foreign and domestic traffic, by million tonnes

UK Rank	Port	Tonnage (Millions)	Percentage of all UK ports
1	Grimsby and Immingham	54.71	10.76
2	London	45.44	8.94
3	Milford Haven	39.29	7.73
4	Tees and Hartlepool	39.16	7.70
5	Southampton	37.23	7.32
6	Forth	36.69	7.22
7	Haven Gateway Ports	32.17	6.33
8	Liverpool	29.89	5.88
9	Felixstowe	26.42	5.20
10	Dover	25.08	4.93
27	Harwich	2.94	0.58
30	Ipswich	2.81	0.55
-	All UK ports	508.49	100.00

Source: DfT statistics, 2009

- The table above shows that Felixstowe has the largest foreign and domestic port traffic by tonnage of the Haven Gateway ports, and ranks 8th largest in the UK.
- Collectively the Haven Gateway ports have the 7th largest amount of port traffic in the UK.

Major port traffic for lo lo containers, by million tonnes, 2009

UK Rank	Port	Tonnage (millions)	Percentage of all UK ports
1	Haven Gateway Ports	22.09	41.06
2	Felixstowe	22.06	41.02
3	Southampton	7.60	14.13
4	London	7.27	13.52
5	Liverpool	4.20	7.80
6	Medway	3.19	5.93
7	Forth	2.19	4.06
8	Belfast	1.58	2.94
9	Tees and Hartlepool	1.23	2.29
10	Hull	1.06	1.97
22	Harwich	0.02	0.04
-	Ipswich	0.00	0.00
	UK total	53.79	100.00

Source: DfT statistics, 2009

- Felixstowe has substantially the largest port traffic for lo lo containers in the UK. Harwich has a small amount of lo lo traffic, ranking 21st in the UK.

Major port traffic for roll on / roll off, by million tonnes, 2009

UK Rank	Port	Tonnage (millions)	Percentage of UK total
1	Dover	24.70	24.14
2	Grimsby and Immingham	12.88	12.59
3	Haven Gateway Ports	7.46	7.30
4	Liverpool	6.53	6.38
5	London	6.04	5.90
6	Belfast	4.51	4.41
7	Felixstowe	4.32	4.22
8	Larne	4.28	4.18
9	Hull	3.41	3.33
10	Heysham	2.96	2.89
14	Harwich	2.40	2.34
24	Ipswich	0.75	0.74
	UK total	102.32	100.00

Source: DfT statistics, 2009

- Felixstowe has the largest roll on / roll off port traffic of the Haven Gateway ports, and the 6th largest in the UK.
- Harwich has the 13th largest roll on / roll off traffic in the UK, which makes the Haven Gateway ports collectively the 3rd highest in the UK.

Ro-Ro ferry passengers on short sea routes

UK Rank	Port	Number of passengers (thousands)	Percentage of UK total international passengers
1	Dover	13783.32	60.35
2	Portsmouth	2087.49	9.14
3	Holyhead	1996.22	8.74
4	Hull	965.60	4.23
5	Haven Gateway Ports	609.78	2.67
6	Tyne	594.52	2.60
7	Harwich	593.16	2.60
8	Plymouth	570.59	2.50
9	Fishguard	553.63	2.42
10	Poole	474.15	2.08
17	Felixstowe	14.61	0.06
22	Ipswich	2.02	0.01
	All port areas	22840.18	100.00

Source: DfT statistics, 2009

- Harwich has the 6th largest number of short sea route passengers in the UK, and with a small number at Felixstowe and Ipswich, collectively the Haven Gateway ports have the 5th largest amount of passengers
- Dover has substantially the largest amount of short sea route passengers in the UK

Passengers on long sea routes

UK Rank	Passengers on long sea journeys beginning or ending at UK ports(1)	Number of passengers (thousands)	Percentage of UK total on long sea journeys beginning or ending at UK ports
1	Southampton	889.40	66.32
2	Dover	222.57	16.60
3	Harwich	126.30	9.42
4	Other ports	102.94	7.68
	Total	1341.20	100.00

(1) Cruise passengers, like other passengers, are included at both departure and arrival if their journey begins and ends at a UK seaport.
Source: DfT statistics, 2009

- Harwich has the 3rd largest amount of long sea route passengers in the UK
- At 66% of total UK passengers, Southampton substantially has the largest amount of long sea route passengers in the UK

Importance of the Haven Gateway Ports

The Haven Gateway ports are within the top ten ports in the country in relation to level of usage by passenger numbers and tonnage. They are nationally important for the UK's lo lo containers port traffic, mainly due to Felixstowe managing 41% of the UK's lo lo container tonnage.

Harwich is of most importance to the UK for short and long sea ferry passenger routes, and provides a substantially larger passenger service than the other Haven Gateway ports.

b) Haven Gateway ports – Felixstowe, Ipswich, and Harwich general information

Harwich

- Operations include North Sea freight and passenger traffic to and from Scandinavia and the Benelux countries. Harwich offers first-class ro-ro, ferry, container and bulk operations and has recently benefited from significant investment in new facilities, wider range of port services and highly trained staff. The development of Bathside Bay will significantly increase capacity as a deep-sea container port by 2016. (Invest Essex website, accessed June 2010)
- The revenue from cruise passengers generates £18 million per annum (Haven Gateway Port Related Growth Initiative Event July 2010 press release info and slide presentation)

Bathside Bay Container Terminal

(Information from Tendring DC website, accessed August 2010)

- The £300 million container terminal scheme will make Harwich potentially the second largest container port in the UK, almost doubling the total quay length to 3,000 metres, and enabling the Port to handle up to four deep-sea container vessels simultaneously.
- The features of Harwich International Container Terminal will include:
    - 1,400 metres of quayside
    - depth of 15 metres alongside the quay
    - approach channel of 14.5 metres
    - 11 Ship-to-Shore Gantry Cranes
    - 44 Rubber-Tyred Gantry Cranes
    - storage yard capacity of 52,000 TEUs
    - rail terminal capacity of 462,000 TEUs per annum
- It will also lead to the creation of some 772 direct jobs and many thousands more are expected to be created in businesses connected to the port's activities and also in new inward investments by companies seeking to be close to the major port facility.
- The future proposed throughput of the terminal is 1.7 million TEU (Twenty-foot Equivalent Units) (Haven Gateway Port Related Growth Initiative Event July 2010 powerpoint display)

Haven Gateway

(Information from Haven Gateway Port Related Growth Initiative Event July 2010 press release info and slide presentation)

- 1,250 new and replacement ports and logistics jobs are required each year
- The average ports and logistics annual wage is £29,000 - £4k higher than the sub-regional average
- Other Haven Gateway port traffic includes:
    - Mistley: freight of 161 thousand tonnes (0.03 % of UK ports)
    - Brightlingsea: freight of 82 thousand tonnes (0.01% of UK ports)
- The value of the ports sector in the Haven Gateway Partnership areas distribution, transport and logistics collective business turnover totals £2.2 billion

- Felixstowe has a current port capacity of 3.3 million TEU in 2007
- Future developments – proposed additional capacity:
  - Felixstowe South – 1.6 m TEU
  - London Gateway - 3.5 m TEU
  - Bathside Bay – 1.7 m TEU

  (other areas)
  - Teesport - 1.6 m TEU
  - Liverpool – 0.6 m TEU
  - Bristol – 1.5 m TEU
  - Southampton – 1.7 m TEU

c) London Gateway Port

<u>Key statistics of London Gateway Port</u>

- UK's first 21st Century major deep-sea container port and Europe's largest logistics park. It is the most significant UK port development for 20 years
- It will be developed on a 1,500 acre disused brownfield site, located 25 miles from central London on the former Shell Haven oil refinery location at Stanford-le-Hope on the north bank of the Thames.
- Potentially create over 12,000 new jobs
- The quay will be 2.7 kilometre-long
- There will be a capacity of 3.5m TEUs per annum
- The Port will include 6 berths, 175 hectares of terminal area, and 24 cranes
- The port is adjacent to and integrated with Europe's largest logistics park, which will include over 9 million square feet for the distribution, manufacturing, and high-tech sectors
- The London Gateway Port will act as a hub linking sea, road and rail to reduce the need for road haulage and cut CO^2 emissions. This will bring an estimated saving of over 60 million HGV miles per year (148,000 tonnes of CO^2 savings per annum)

(http://www.londongateway.com/portal/page/portal/LONDON_GATEWAY/About-Us/Key-Statistics)

<u>Background information from Invest Essex website</u>

- The new London Gateway container port, a £1.5 billion investment at a former oil refinery, will become one of the UK's most important hubs. Part of this vast development is a huge logistics and business park providing nearly one million sq metres of commercial and distribution accommodation, direct access to an international deep sea container port and ro-ro terminal, rail-connected facilities, and excellent road access to the motorway network.

<u>How important is London Gateway, will it be the largest port in the UK?</u>

The Port of Felixstowe is the largest container port in the UK, and currently manages over 3 million TEU per year[1]. DP World Southampton is the UK's 2nd largest container terminal, and in 2007 handled 1.9 million TEU[2]. The London Gateway Port development is proposed to manage 3.5 TEU, which would exceed the current levels at other UK

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[1] http://www.portoffelixstowe.co.uk/publications/journal/frmukslargestcontainerport.aspx
[2] www.abports.co.uk/custinfo/ports/soton.htm

container ports. However, development at the Port of Felixstowe is expected to increase TEU capacity to 5.3 million by 2014, and with Bathside Bay considered to be part of a HPUK (Hutchinson Ports UK limited) Haven Ports complex, this area would have the total capacity for 7 million TEU per annum[3]. Also, Southampton has ‘advanced plans’ to expand terminal capacity by 1.7 million TEU[4], which would total 3.6 million TEU including existing capacity.

This would suggest that when the London Gateway Port is complete, it will be the UK’s third largest container port in terms of TEU capacity per annum.

d) General background information on the Port of Tilbury, how does it compare to other ports in the UK?

Background information from Forth Ports PLC[5]:

- Port has a large geographical advantage for transport in and out of London and the South-East, and is well positioned to access the M25 orbital motorway and the rest of the UK's national motorway network. In addition, there are direct rail connections within the Port, with access to the whole of the UK.
- The port covers over 850 acres, and offers:
  - 34 operational Berths
  - Over 16 independent working terminals
  - Over 7.5 kilometres of quay
  - Over 500,000 square metres of warehouse space
  - Over 7 kms of road within port estate with excellent transport access
- The Port handles significant levels of diverse cargo including the importation of paper as the UK's leading port, containers, grain, and various bulk handling facilities, all of which are handled at a number of berths both in dock and on river facilities.

<u>Importance of the Port of Tilbury to the UK</u>

The port is the UK’s leading port for handling paper products, using the latest paper handling technology to manage 3 million tonnes of paper products passing through per annum. Also, the port also handles around 1.35 million tonnes of grain per annum[6], making it one of the largest grain handling Port in the UK.

The port has a low container throughput compared nationally (see 13c above), of 300,000 TEU per annum[7]. As shown in section 13a) above and appendix 6, data on Tilbury is not provided separately, but called London as part of a collection of ports in a number of locations across the city. The collection of London ports are nationally important, providing the 2nd highest amount of port traffic in the UK, the 4th highest amount of lo lo tonnage, and the 5th highest amount of ro-ro tonnage[8]. However, only part of this can be attributed to Tilbury.

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[3] http://www.portoffelixstowe.co.uk/pressreleases/frmPress.aspx?pid=259
[4] DFT, Draft National Policy Statement for Ports, 2009
[5] http://www.forthports.co.uk/ports/ports/tilbury/
[6] As above
[7] As above
[8] DfT Statistic, 2009

The Port of Tilbury can be considered a nationally important port in relation to handling paper products and grain, and it forms part of a nationally important collection of ports serving London and the south east.

14. Essex Airports – Stansted and Southend

a) Basic fact and figures, how important is Stansted and Southend in comparison to the rest of the UK's airports?

The following tables show the number of passengers and amount of freight that is managed at the airports of Stansted and Southend. The full tables are provided in appendix 7.

Number of airport passengers, 2009

UK rank	Airport	No. passengers
1	HEATHROW	65,906,641
2	GATWICK	32,360,773
3	STANSTED	19,949,689
4	MANCHESTER	18,630,394
5	LUTON	9,115,327
6	BIRMINGHAM	9,093,201
7	EDINBURGH	9,043,452
8	GLASGOW	7,213,397
9	BRISTOL	5,615,200
10	LIVERPOOL	4,879,468
50	SOUTHEND	3,948
	UK Total	181,811,490

Source: Civil Aviation Authority statistics, 2009

Total airport freight, by tonnes, 2009

UK Rank	Airport	Freight (tonnes)
1	HEATHROW	1277649.7
2	EAST MIDLANDS INTERNATIONAL	255120.8
3	STANSTED	182810.0
4	MANCHESTER	102543.3
5	GATWICK	74679.5
6	KENT INTERNATIONAL	30038.0
7	BELFAST INTERNATIONAL	29803.7
8	LUTON	28643.4
9	EDINBURGH	23791.5
10	PRESTWICK	13385.1
50	SOUTHEND	0.0
	UK Total	2055209.3

Civil Aviation Authority Statistics, 2009

The above tables show that Stansted is the third busiest UK airport for both passengers and freight in the UK. Although Southend managed 133 tones of freight in 2007, in 2009 no freight passed through the airport. Southend also has one of the lowest passenger numbers in the UK.

Information from the Stansted airport website (accessed: 08/2010) states that 17 chartered airlines operate at Stansted, providing flights to 144 destinations across the world.

b) Expansion plans for the future of Stansted

Potential airport capacity of the largest airports:
(DfT, UK air passenger demand and CO2 forecasts, 2009)

- Stansted has a maximum capacity using existing infrastructure of 35 million passengers per annum (mppa). If a second runway was added, by 2015 the capacity could rise to 82 mppa
- Gatwick has a maximum capacity using existing infrastructure of 47 mppa
- Heathrow has a maximum capacity using existing infrastructure of 86 mppa. If a second runway was added, by 2020 the capacity could rise to 135 mppa

The Stansted G2 Inquiry was due to start on 15 April 2009. This has now been put into abeyance by the Secretary of State to allow BAA to take their objection to the Competition Commission's report regarding the future ownership of the airport through the Competition Appeal's Tribunal process. BAA decided to appeal (on the 18 May) against the Competition Commission's findings. In public BAA made no approach to the SoS to delay the Stansted G2 Inquiry.

The Coalition Government has stated that it will not support additional runway capacity at Stansted, Gatwick, and Heathrow.

c) Expansion plans for the future of Southend

The Invest Essex website states that London Southend Airport could act as the Eastern Gateway to London and could be a key element of the Thames Gateway programme. To extend the range of passenger services, expansion proposals for the future airport could include a new railway station, a new control tower, terminal building, and high-quality hotel.

The Southend Airport website[9] states that the current approved application includes:

- A south westerly extension of the runway
- Diversion of Eastwoodbury Lane, together with provision of a new cycleway and footpath around the extended runway
- Improvements to St Laurence Park following the road diversion, increasing the amount of public space and providing additional ecological habitat

Extending the runway by 300m will allow larger aircraft to use the airport and serve a wide range of business and holiday destinations. The expanded airport could be used for over 400,000 business trips each year, putting Southend on the business map and providing opportunities to promote Southend and Rochford to a wider audience.

The expansion of the airport aims to provide:

- An airport which caters for local demand, reducing the need to travel to the major London airports
- An extension to the existing runway allowing newer, more modern and quieter aircraft to use the airport
- Tighter restrictions on night noise, cargo volumes, night flights and the introduction of a cap on the total number of flights allowed

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[9] *www.flysouthend2012.com/*

- The creation of additional jobs both at the airport and in new business attracted to the area by the presence of the airport, the international connectivity, and by the opportunity to do business with airport related enterprises
- A massive boost in new investment in the infrastructure of the airport

15. Logistics in Thurrock

Information provided in table 17 of appendix 4 shows that:

- With 13.83% of the population employed in transport storage and communication, Thurrock has the 2nd highest proportion of employment in this sector in Great Britain, after Outer London (West and North West London).
- Essex and Southend comparatively have low levels of employment in the logistics based sector, ranked nationally at 32nd and 123rd respectively.

A deep-sea container port at London Gateway Port with a capacity of 3.5 million TEUs per annum (see 13 c above), and Europe's largest logistics park consisting over 9 million square feet, and excellent existing connections to the nation road and rail network, will ensure that Thurrock will remain one of the most important areas for logistics in the country.

16. Crossrail – function, capacity and significance for the South East

Information on the crossrail website[10] states the following key facts:

- It is the largest addition to the transport network in the region for more than 50 years, and currently the largest civil engineering project in Europe.
- It is planned to be completed by 2017.
- Crossrail will run 118.5 km from Maidenhead and Heathrow in the west, through new twin-bore 21 km tunnels under Central London out to Shenfield and Abbey Wood in the east, joining the Great Western and Great Eastern railway networks.
- It will operate with main line size trains, carrying more than 1500 passengers in each train.
- The service will include at least 24 trains per hour during peak times in each direction
- The branches include:
    - Maidenhead to Stepney Green Junction - 68.0km
    - Stepney Green Junction to Shenfield - 30.5km
    - Stepney Green Junction to Abbey Wood - 13.0km
    - Heathrow Junction to Heathrow Airport Terminal - 7.0km
- In total the project will consist of 41.6km of tunnels, including the following twin-bore tunnels:
    - Royal Oak to Farringdon (6.2km)
    - Limmo Peninsula to Farringdon (8.3km)
    - Stepney Green to Pudding Mill (2.7km)
    - Limmo Peninsula to Victoria Dock (1.0km)
    - Plumstead to North Woolwich (2.6km)
- Crossrail will make travelling in the area easier and quicker and reduce crowding on London's transport network.

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[10] *www.crossrail.co.uk/company/about-us (accessed 14/09/10)*

- Crossrail will deliver substantial economic benefits in London and the South-East and across the UK, linking Heathrow Airport, the West End, City and Canary Wharf via direct services. The estimated benefit of Crossrail to the UK economy is at least £36 billion (TfL figures, May 2006)[11].

17. Creative arts and media in Essex

a) How important is Essex in the UK's creative arts and media sector?

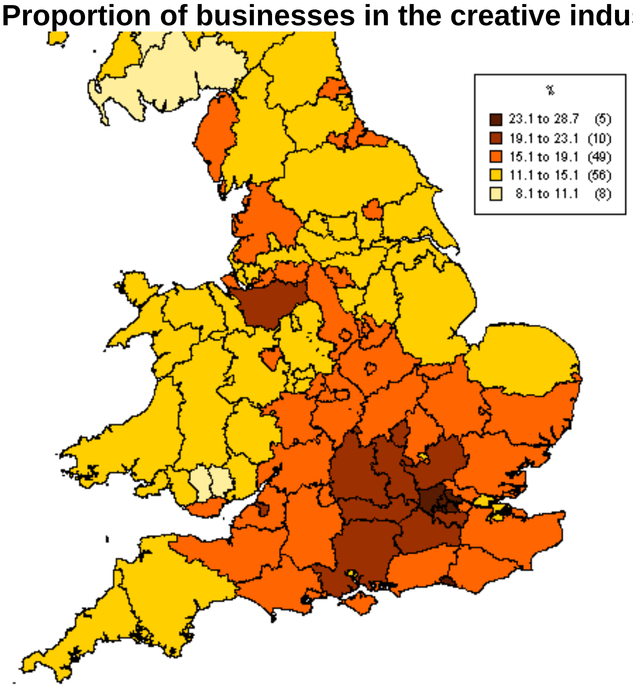
Proportion of businesses in the creative industry sector (see table 4 in appendix 4):

- In comparison to Great Britain, Essex has an average proportion of business involved in the creative industries sector
- Essex has the 34th largest proportion of creative industries in a county or unitary area in Great Britain

Proportion of employment in the creative industries sector (see table 13 of appendix 4)

- Compared to other county and unitary areas in Great Britain, Essex has the 27th highest proportion of employment (workplace based) in Great Britain.
- 7.49% of employment in Essex is within the creative industries sector, this is below the national average of 7.63%
-

Proportion of businesses in the creative industry sector



Source: Local Knowledge; Annual Business Inquiry; National Statistics website (Nomis: www.nomisweb.co.uk)

[11] *www.crossrail.co.uk/company/about-us (accessed 14/09/10)*

18. The knowledge economy in Essex

a) Does Essex feature in the in the key knowledge economy areas of the country?

Percentage change in the knowledge driven sector 2006-2008 (see table 3.5 in appendix 4):

- Between 2006-2008, the number of businesses in the 'knowledge-driven' sector in Essex reduced by 86%, this was the largest reduction in all counties and unitaries in Great Britain.
- Thurrock and Southend are within the top 20 areas in Great Britain for knowledge-driven sector growth since 2006

Proportion of county or unitary employment in the knowledge-driven sector (see table 12 of appendix 4):

- Compared nationally, Essex has an average level of employment in knowledge-driven sectors. 22.6% of employment in Essex is within the knowledge-driven sector, making Essex the 46th highest county or unitary area for proportion of employment in this sector.

Proportion of employment in hi-tech industries (see table 14 of appendix 4):

- Essex and Southend are within the top 20 areas of Great Britain for the proportion of employment in there areas related to high-tech industries
- Southend is ranked 14th in Great Britain with 1.72% of employment in this sector. Essex is ranked 17th in Great Britain with 1.57% of employment in this sector

Proportion of employment in R&D (see table 15 of appendix 4):

- Essex has a higher than average level of employment in research and development, ranked 28th in Great Britain for the proportion of employment in the county related to this sector.
- Southend also has a higher than average ranking at 29th in Great Britain.
- Thurrock has a low proportion of employment in R&D, ranked 118th (out of 128 county and unitary authorities) (see table 15.5 of appendix 4)
    - The districts of Thurrock and Castle Point have the lowest proportion of employment in R&D section in the East of England, nationally ranked 324th and 337th in the country (out of 372 local authorities))
    - A number of Essex districts have low proportions of employment in R&D, including Tendring (0.02%), Brentwood (0.04%), Colchester (0.04%), Braintree (0.06%), and Basildon (0.08%), ranking nationally 291, 240, 234, 212, 188 respectively (out of 372 local authorities)

Share of national knowledge driven production employment (see table 19 of appendix 4):

- Essex has the 6th highest share of knowledge driven production employment in Great Britain
- 2.28% of the knowledge driven production employment in Great Britain is located in Essex

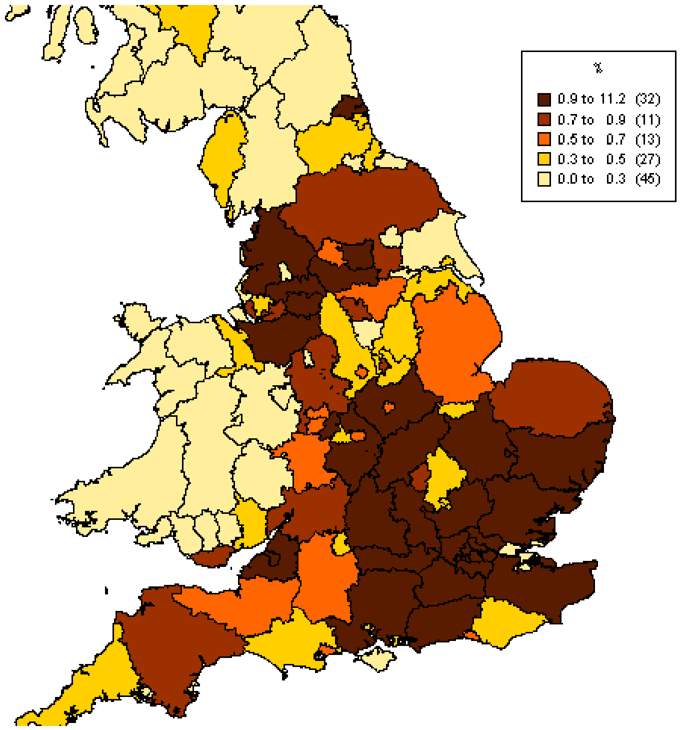
Share of national knowledge driven sector employment (see table 20 of appendix 4)

- Essex has the 11th highest share of knowledge driven sector employment in Great Britain

- 1.81% of the knowledge driven production employment in Great Britain is located in Essex

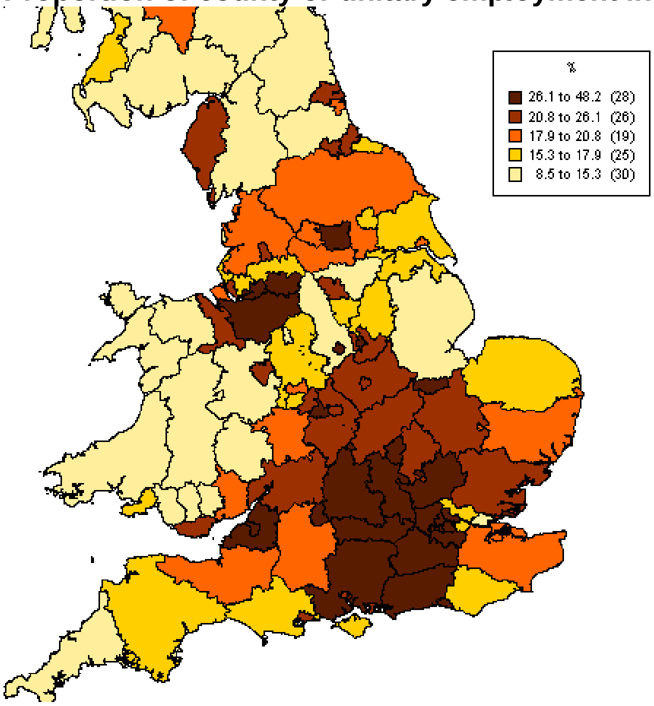
b) Mapping the knowledge economy

Share of national knowledge driven sector employment within county and unitary areas



Source: Local Futures; National Statistics website (Nomis: www.nomisweb.co.uk)

Proportion of county or unitary employment in the knowledge-driven sector



Source: Local Futures; National Statistics website (Nomis: www.nomisweb.co.uk)

19. An Essex low carbon economy

a) What can local industry offer?

<u>Greener transport solutions</u>
The London Gateway port is proposed to create greener integrated transport solutions. The invest Essex website states that it will transform the movement of freight around the UK, reducing road haulage and cutting CO2 emissions. On completion, London Gateway Port will act as a hub linking sea, road and rail in the south of the county. This will bring an estimated saving of over 95 million HGV kilometres per year.

<u>Low carbon companies</u>
Section 11 above considered how Essex businesses compared to UK growth sectors identified by BIS. There were no companies within that could be identified within the low carbon energy sector.

<u>Wind power sector in Essex</u>
As outlined in section 8, the East of England is the UK's second largest producer of electricity from offshore wind turbines. Currently Essex provides 74.2% of the offshore wind farm capability for the East of England, and 7.4% of the UK total. Therefore there is a large opportunity in Essex to further specialise this sector, and encourage associated companies and university courses. With Bradwell nuclear power station in Maldon, there is already a strong presence of existing low carbon energy infrastructure in Greater Essex, which could encourage associated companies to locate in Essex.

Currently the main economic benefits from wind farms can be identified at the Haven Gateway ports. The Haven Gateway Partnership[12] has identified the following features of wind farm development that indicates how the sector could expand in Essex;

- Initial survey work, in which surveyors and their vessels require a marine base, back-up services and accommodation
- Manufacturing, storage, and assembly of components
- Loading out components for construction
- Ongoing service and maintenance requirements, for the total existence of the wind farm

Two ports within Essex are identified by EEDA[13] to be important for the development of a strong wind port sector in the East of England;

- **Harwich** International Port provided assembly facilities to the Gunfleet Sands wind farm involving the barge transfer of 48 turbines. The port was involved in the Greater Gabbard project, which required the handling of 140 complete turbines. In the future, Harwich International Port could provide a dedicated facility to support further expansion of the offshore renewables industry in the East of England. The multi-purpose port has a range of facilities to support the development of offshore wind farms, including lock-free access, a sheltered harbour with deepwater approaches, and no restriction on air draught. The port is ideally located for North Sea freight and passenger traffic to and from Scandinavia and the Benelux countries.

- The Gunfleet Sands wind farm construction phase involved some heavy construction work outside the creek at **Brightlingsea**. Operators DONG have built offices at Brightlingsea, and will be organising the operation and maintenance of Gunfleet Sands from the harbour for the lifetime of the wind farm. The Gunfleet Sands project has helped to rent up to 40 residential units in the town, and has also generated significant economic benefits for local shops and businesses.

[12] *http://www.haven-gateway.org/news/landmark_for_wind_energy*
[13] *EEDA, Low Carbon Innovation Cluster, an overview of the offshore wind sector*

20. Quality of Essex visitor attractions

The national tourist boards of England, Northern Ireland, Scotland and Wales each conduct an annual Survey of Visits to Visitor Attractions[14], last conducted in 2009. The results of the survey are provided by separating the top 20 visitor attractions by number of visitors in each region, and nationally, and separating the top 20 attractions nationally by type of attraction.

Four tourist attractions in Essex were included in the top 20 attractions in the East of England, which are outlined in the table below.

Attraction	Number of visitors in 2009	Ranking in East of England	Type of entry
River Lee Country Park	1,500,000	1	Free
Colchester Zoo	517,178	4	£15.99
RHS Garden Hyde Hall	134,167	18	£7
Hadleigh Country Park	125,000	20	Free

None of the national top 20 visitor attractions are located in Essex, although a large proportion are in London and easily accessible by car and public transport from Essex.

Separating national visitor attractions by category show that:

- River Lee Country Park is the most visited country park in the England
- Lee Valley Park Farm is the 10th most visited major farm in the country, with 74,000 visitors in 2009
- Colchester Zoo is the 3rd most visited zoo in the country

[14] *Available at: http://www.enjoyengland.com/corporate/corporate-information/research-and-insights/statistics/Annual-Visitor-Attractions-Survey/Visitor-Attractions.aspx (Accessed 16/09/10)*

Appendix 1: Travel to work flows between Essex and London, 2001

Travel to work flows between Essex and London, 2001

							Percentage of:				
	Total 16-74 employed	Residents that live and work in same district	Residents that work in Greater London	Residents that work in the City of London	Residents that work in Tower Hamlets	Residents that work in Westminster	Residents that live and work in same district	Residents that work in Greater London	Residents that work in the City of London	Residents that work in Tower Hamlets	Residents that work in Westminster
Basildon	77,586	42,468	18,269	4,966	1,967	1,784	55	24	6	3	2
Braintree	66,002	37,619	6,679	2,024	695	855	57	10	3	1	1
Brentwood	32,708	14,818	11,655	2,692	1,069	1,127	45	36	8	3	3
Castle Point	41,030	15,459	8,034	2,380	928	730	38	20	6	2	2
Chelmsford	79,969	47,247	13,892	4,188	1,334	1,496	59	17	5	2	2
Colchester	74,908	53,378	5,368	1,772	534	738	71	7	2	1	1
Epping Forest	57,708	22,058	26,137	3,665	2,134	2,803	38	45	6	4	5
Harlow	38,788	23,875	5,501	726	415	562	62	14	2	1	1
Maldon	28,897	15,115	3,149	879	329	270	52	11	3	1	1
Rochford	37,707	13,596	6,743	2,358	718	642	36	18	6	2	2
Southend-on-Sea	70,010	43,526	10,458	3,579	1,123	1,230	62	15	5	2	2
Tendring	53,419	36,050	2,756	599	251	359	67	5	1	0	1
Thurrock	69,360	39,373	19,490	3,744	2,060	1,743	57	28	5	3	3
Uttlesford	34,934	19,254	4,402	1,122	405	608	55	13	3	1	2
Greater Essex	763,026	423,836	142,533	34,694	13,962	14,947	56	19	5	2	2
London	3,307,277	3,083,087	3,083,087	212,039	122,049	399,632	93	93	6	4	12

Souce: Census 2001, on Nomis

Appendix 2: County tables from the Seaside Tourist Industry Report

Table 9: Estimated average year-round employment directly supported by seaside tourism, by county, 2006/8

	no. of jobs
Lancashire	21,500
East Sussex	19,000
Devon	18,900
Cornwall	17,700
Dorset	17,300
Norfolk	11,100
Kent	9,400
Isle of Wight	7,900
North Yorkshire	7,900
Essex	6,900
Merseyside	6,800
Lincolnshire	6,500
Humberside	6,100
Suffolk	5,200
Tyne and Wear	5,100
Hampshire	5,000
West Sussex	4,300
Somerset	3,800
Avon	2,800
Cleveland	1,300
Cumbria	1,300
Northumberland	700
Wales	20,800
England and Wales	210,000

Source: Authors' estimates based on ABI

(Seaside Tourist Industry in England and Wales Study, 2010, p49)

Table 13: Estimated annual output (GVA) directly attributable to the seaside tourist industry, by county, 2007

	£m
East Sussex	410
Lancashire	310
Devon	260
Cornwall	250
Dorset	250
Norfolk	220
Kent	180
Essex	150
Isle of Wight	150
Merseyside	120
North Yorkshire	110
Suffolk	110
Hampshire	100
Lincolnshire	100
Humberside	90
Tyne and Wear	70
West Sussex	70
Avon	50
Somerset	50
Cleveland	30
Cumbria	20
Northumberland	10
Wales	280
England and Wales	3,400

Source: Authors' estimates based on ABI and ONS

(Seaside Tourist Industry in England and Wales Study, 2010, p54)

Appendix 3: Amount of arable farming in Essex

Amount of arable farming by hectare, by county or unitary, 2009

County / unitary	Wheat area (ha)	Winter barley area (ha)	Spring barley area (ha)	Oats area (ha)	Other cerals area (ha)	Total cerals (ha)
Peterborough	10 355	1 000	#	#	0	12 457
Cambridgeshire cc	101 312	7 107	8 208	1 068	220	117 915
Norfolk	97 193	39 295	43 320	1 046	1 152	182 005
Suffolk	96 106	21 121	15 118	1 455	1 617	135 416
Luton	0	0	0	0	0	0
Bedfordshire cc	32 706	2 108	4 381	#	#	40 413
Hertfordshire	34 544	3 713	5 217	#	#	46 334
Greater Essex	**100656**	**9868**	**8639**	**1794**	**235**	**121192**
Kent cc	56 152	4 439	4 556	2 678	472	68 297
Lancashire cc	8 268	1 721	5 956	1 368	281	17 594
Greater Essex national rank (of 93 County / Unitary areas)	**3**	**9**	**16**	**22**	**29**	**5**

Source: Defra survey of agriculture and horticulture, June 2009

County / unitary	Potatoes area (ha)	Sugar beef area (ha)	Field beans area (ha)	Peas for harvesting dry area (ha)	Oilseed rape area (ha)	Linseed area (ha)	Root crops area (ha)	Other crops for stock feed area (ha)	Maize area (ha)	Other arable crops (ha)	Total Arable area (ha)	Bare fallow/GA EC12 land
Peterborough	582	1 412	1 019	755	2 919	400	#	#	60	159	31118	830
Cambridgeshire cc	8 117	13 727	8 423	5 466	27 405	1 231	226	262	457	1 115	302259	7 921
Norfolk	14 319	40 956	9 030	1 841	25 334	1 129	1 926	405	3 680	1 686	464317	17 525
Suffolk	7 382	16 297	9 279	874	26 887	725	722	235	1 770	1 508	336513	12 144
Luton	0	0	0	0	0	0	0	0	0	0	0	0
Bedfordshire cc	343	156	5 189	823	10 606	168	31	34	375	318	97653	3 686
Hertfordshire	193	#	6 710	930	9 106	353	4	#	587	152	107843	3 367
Greater Essex	**3017**	**2875**	**14185**	**4656**	**27712**	**1903**	**284**	**558**	**1278**	**1682**	**300534**	**8099**
Kent cc	2 076	83	7 110	1 996	23 005	1 636	204	189	2 663	1 141	176 698	7 059
Lancashire cc	3 147	59	862	79	729	9	598	323	2 378	147	43 519	1 607
Greater Essex national rank (of 93 County / Unitary areas)	**12**	**7**	**2**	**3**	**4**	**2**	**21**	**6**	**30**	**3**	**6**	**6**

Appendix 4: Ranking Data from Local Futures Database for Counties and Unitary Authorities, main economic features

Businesses

1. Business and enterprise score

Business and enterprise score (2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**GB=100**	**Nat. Rank**
1	Thurrock	129.55	2
2	Luton	109.12	27
3	Hertfordshire	105.99	38
4	Peterborough	104.33	46
5	Essex CC	103.81	52
6	Bedfordshire CC	102.46	56
7	Cambridgeshire CC	95.89	82
8	Southend-on-Sea	95.54	85
9	Suffolk	93.48	91
10	Norfolk	91.41	95
England & Wales : 100			

National top 10 ranking

Business and enterprise score (2009)		
NUTS 3 (incl. Counties)	**GB=100**	**Nat. Rank**
Inner London - East	131.28	1
Thurrock	129.55	2
Kingston upon Hull, City of	125.36	3
Hartlepool and Stockton-on-Tees	121.59	4
Portsmouth	121.34	5
Milton Keynes	121.28	6
South Teesside	120.43	7
East Merseyside	119.95	8
Coventry	119.94	9
Tyneside	119.37	10

This is an indicator of the enterprise of businesses within the locality. The higher the score, the more business enterprise in an area. Business enterprise takes into consideration an areas business formation rate, the change of in VAT registered business stock, and new business survival rates.

Source: Local Knowledge; Business Demography: Enterprise Births & Deaths, Local Units by Broad Industry Group: Urban/Rural

National Statistics website (www.neighbourhood.statistics.gov.uk)

Note

- Thurrock has the 2nd highest level of business enterprise in Great Britain

2. Business closure rate

Business closure rate (2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Southend-on-Sea	12.38	2
2	Peterborough	9.72	44
3	Luton	9.66	46
4	Essex CC	9.65	49
5	Hertfordshire	9.41	56
6	Norfolk	9.22	64
7	Suffolk	8.98	75
8	Bedfordshire CC	8.67	90
9	Thurrock	8.43	94
10	Cambridgeshire CC	8.24	96
England & Wales : 9.53			

National top 10 ranking

Business closure rate (2009)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
North and North East Lincolnshire	14.64	1
Southend-on-Sea	12.38	2
Blackpool	12.26	3
Swansea	11.88	4
Outer London - East and North East	11.35	5
Torbay	11.26	6
Sunderland	11.15	7
Kingston upon Hull, City of	11.07	8
Barnsley, Doncaster and Rotherham	11	9
Birmingham	10.97	10

This shows the percentage of businesses that have deregistered for VAT within the last year.

Source: Local Knowledge; Business Demography: Enterprise Births & Deaths
National Statistics website (www.neighbourhood.statistics.gov.uk)

<u>Note</u>

- Southend have the 2nd highest amount of businesses closures in Great Britain

3. Change in agriculture sector, 1998- 2008

Change in stock of Agriculture, Forestry & Fishing (1998-2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Southend-on-Sea	40	3
2	Luton	0	23
2	Thurrock	0	23
4	Essex CC	-2.69	39
5	Hertfordshire	-3.59	47
6	Bedfordshire CC	-5.59	63
7	Suffolk	-6	69
8	Norfolk	-10.98	99
9	Peterborough	-13.64	106
10	Cambridgeshire CC	-13.79	107
Great Britain : -6.7			

National top 10 ranking

Change in stock of Agriculture, Forestry & Fishing (1998-2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Portsmouth	100	1
Inner London - East	47.62	2
Southend-on-Sea	40	3
Dudley and Sandwell	36.36	4
Outer London - South	25.64	5
Bournemouth and Poole	23.08	6
Medway	14.29	7
East Merseyside	11.54	8
Berkshire	11.11	9
Outer London - East and North East	10.34	10

Percentage change in the number of enterprises registered for VAT, in the SIC (Standard Industrial Classification) defined Agriculture; Forestry and fishing businesses

Source: Local Knowledge; Business start-ups and closures: VAT registrations and deregistrations

Note

- Essex is within the top third of areas in Great Britain for the lowest percentage change, with only a slight decrease since 1998
- The level of decrease in the agricultural sector in Essex is comparatively low when compared to other areas such as Kent and Suffolk as shown in the table below

Rank	Geography	Business change: agriculture (%) 1998-2008
1	Essex CC	-2.69
2	Kent CC	-4.73
3	Lancashire CC	-7.63
4	Southend-on-Sea	40
5	Suffolk	-6
6	Thurrock	

3.5 Change in knowledge-driven sectors, 2006-2008

Change in businesses in Knowledge-driven sectors (2006-2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Thurrock	8.93	14
2	Southend-on-Sea	7.67	17
3	Norfolk	2.01	45
4	Hertfordshire	0.78	54
5	Suffolk	0.75	55
6	Luton	0.37	60
7	Peterborough	-1.71	81
8	Bedfordshire CC	-54.49	108
9	Cambridgeshire CC	-70.41	118
10	Essex CC	-86.57	128
Great Britain : 1.32			

National top 10 ranking

Change in businesses in Knowledge-driven sectors (2006-2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Eilean Siar (Western Isles)	554.98	1
Darlington	135.13	2
Falkirk	118.06	3
East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond	73.39	4
East Lothian and Midlothian	70.26	5
Blackburn with Darwen	63.87	6
Blackpool	56.18	7
Dumfries & Galloway	47.14	8
East Ayrshire and North Ayrshire Mainland	13.87	9
North Lanarkshire	12.86	10

Percentage change in the number of businesses in the following "Knowledge-driven" sectors: Aerospace (35.3), Electric machinery and optical equipment (30, 32, 33), Printing, publishing, recorded media (22.11-22.22), Chemicals (24), Energy (11, 23, 40, 41), Telecomms, computer & related services, R&D (72, 73, 64.2, 64.12), Finance, business services (65, 67, 74 (excluding 74.7, 74.82)), Air transport services (62), & Recreational & cultural services (92). All figures in brackets are 2003 Standard Industrial Classification (SIC) codes.

Source: Local Knowledge; Annual Business Inquiry

National Statistics website (Nomis: www.nomisweb.co.uk).

<u>Note</u>

- Thurrock and Southend are within the top 20 areas in Great Britain for knowledge-driven sector growth since 2006
- Essex was the lowest, behind Greater Manchester South (-85.68) and Berkshire (-80.58)

4. Creative industry sector

Proportion of businesses in Creative industries (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Hertfordshire	20.86	10
2	Southend-on-Sea	18.91	20
3	Cambridgeshire CC	18.38	22
4	Bedfordshire CC	17.72	30
5	Essex CC	17.28	34
6	Peterborough	16.09	48
7	Suffolk	16.02	49
8	Norfolk	14.96	66
9	Luton	14.85	70
10	Thurrock	13.59	90
Great Britain : 17.83			

National top 10 ranking

Proportion of businesses in Creative industries (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - East	28.66	1
Inner London - West	26.48	2
Aberdeen City, Aberdeenshire and North East Moray	24.18	3
Outer London - West and North West	23.74	4
Brighton and Hove	23.66	5
Berkshire	22.95	6
Surrey	22.54	7
Outer London - South	22.44	8
Buckinghamshire CC	22.06	9
Hertfordshire	20.86	10

This figure provides the proportion of businesses in Creative Industries sector. The cultural/creative industries are defined according to the DCMS as the following sectors: Manufacture of knitted and crocheted hosiery (17.71), pullovers/cardigans (17.72), leather clothes (18.10), workwear, (18.21), other outerwear (18.22), underwear (18.23), other wearing apparel and accessories (18.24) and the dressing and dyeing of fur (18.30). Manufacture of footwear (19.30), Publishing of books (22.11), Publishing of newspapers (22.12), Publishing of journals and periodicals (22.13), Publishing of sound recordings (22.14), Other publishing (22.15), Reproduction of sound recording (22.31), Reproduction of video recording (22.32), Reproduction of computer media (22.33), Other retail sale in specialized stores (52.48), Retail sale of second-hand goods (52.50), Publishing of software (72.21), Other software consultancy and supply (72.22), Architectural/ engineering activities (74.20), Advertising (74.40) Photographic activities (74.81), Other business activities NEC (74.87), Motion picture and video production (92.11), Motion picture and video distribution (92.12), Motion picture projection (92.13), Radio and television activities (92.20), Artistic and literary creation etc (92.31), Operation of arts facilities (92.32), Other entertainment categories NEC (92.34), News agency activities (92.40), and Other recreational activities NEC (97.72). All figures in brackets are 2003 Standard Industrial Classification (SIC) codes.

Source: Local Knowledge; Annual Business Inquiry

National Statistics website (Nomis: www.nomisweb.co.uk).

Note

- Essex has an average proportion of businesses in the creative industries sector

5. Tourism sector

Proportion of businesses in tourism related industry (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Southend-on-Sea	5.04	25
2	Norfolk	4.31	40
3	Luton	3.68	61
4	Thurrock	3.55	68
5	Peterborough	3.38	79
6	Suffolk	3.33	82
7	Essex CC	2.87	106
8	Cambridgeshire CC	2.78	110
9	Bedfordshire CC	2.69	115
10	Hertfordshire	2.6	122
Great Britain : 3.66			

National top 10 ranking

Proportion of businesses in tourism related industry (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Blackpool	9.38	1
Gwynedd	9.36	2
Lochaber, Skye & Lochalsh and Argyll and the Islands	9.26	3
Torbay	8.73	4
Caithness & Sutherland and Ross & Cromarty	8.69	5
Isle of Wight	7.46	6
Conwy and Denbighshire	7.3	7
Cornwall and Isles of Scilly	7.25	8
Dumfries & Galloway	7.2	9
Perth & Kinross and Stirling	6.52	10

Source: Local Knowledge; Annual Business Inquiry
National Statistics website (Nomis: www.nomisweb.co.uk)

<u>Note</u>

- Essex has a low proportion of tourism related industry

6. Higher education, research and design sectors

Proportion of businesses in Higher Educ & R & D sectors (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Cambridgeshire CC	1.95	1
2	Bedfordshire CC	0.37	28
3	Peterborough	0.34	36
4	Norfolk	0.3	52
5	Hertfordshire	0.3	56
6	Essex CC	0.27	66
7	Suffolk	0.26	72
8	Luton	0.26	74
9	Thurrock	0.14	123
10	Southend-on-Sea	0.12	126
Great Britain : 0.33			

National top 10 ranking

Proportion of businesses in Higher Educ & R & D sectors (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Cambridgeshire CC	1.95	1
Oxfordshire	0.94	2
Orkney Islands	0.87	3
East Lothian and Midlothian	0.78	4
Cardiff and Vale of Glamorgan	0.76	5
Edinburgh, City of	0.58	6
Eilean Siar (Western Isles)	0.55	7
Shetland Islands	0.55	8
York	0.52	9
Nottingham	0.5	10

Source: Local Knowledge; Annual Business Inquiry
National Statistics website (Nomis: www.nomisweb.co.uk)

<u>Note</u>

- Essex has an average level of higher education and research and design sectors
- Thurrock and Southend are within the 10 lowest levels in Great Britain

7. VAT registrations per 10,000 adult – national indicator for Enterprise

NI 171 Enterprise: VAT registrations per 10,000 adults (2006)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**Rate**	**Nat. Rank**
1	Hertfordshire	48.6	4
2	Bedfordshire CC	41.3	14
3	Essex CC	40.2	18
4	Cambridgeshire CC	38.9	21
5	Southend-on-Sea	38.8	22
6	Peterborough	36.6	27
7	Thurrock	34.2	32
8	Suffolk	33.1	33
9	Norfolk	30.7	38
10	Luton	26.6	49
England : 38.8			

National top 10 ranking

NI 171 Enterprise: VAT registrations per 10,000 adults (2006)		
NUTS 3 (incl. Counties)	**Rate**	**Nat. Rank**
Buckinghamshire CC	58.3	1
Surrey	52.9	2
Milton Keynes	49.3	3
Hertfordshire	48.6	4
Brighton and Hove	47.3	5
Oxfordshire	44.8	6
Shropshire CC	43.9	7
Warwickshire	43.7	8
Wiltshire CC	43.1	9
Northamptonshire	42.6	10

Source: Local Knowledge; Department of Business, Enterprise and Regulatory Reform
DCLG

Note

- Essex is within the top 20 areas in Great Britain that has the highest amount of VAT registrations

Economic Performance

8. Economic competitiveness score

Economic competitiveness score (2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**GB=100**	**Nat. Rank**
1	Hertfordshire	165.52	6
2	Essex CC	138.72	19
3	Peterborough	121.56	32
4	Luton	116.92	35
5	Bedfordshire CC	116.4	36
6	Cambridgeshire CC	111.32	40
7	Thurrock	100.8	54
8	Southend-on-Sea	96	61
9	Suffolk	89.28	69
10	Norfolk	72.88	84
England and Wales : 100			

National top 10 ranking

Economic competitiveness score (2009)		
NUTS 3 (incl. Counties)	**GB=100**	**Nat. Rank**
Inner London - East	196.96	1
Inner London - West	187.2	2
Milton Keynes	177.72	3
Outer London - West and North West	172.36	4
Berkshire	169.72	5
Hertfordshire	165.52	6
Surrey	153.76	7
Hampshire CC	152.56	8
Bristol, City of	151.08	9
Greater Manchester South	149.04	10

The economic competitiveness is a composite based on economic scale (GVA 2007 and employment (2008) indexed to GB average), productivity (earnings (2009) and 2007 GVA), economic change 2006-2008 (change in total employment), industrial structure 2008 (knowledge sector employment) and business enterprise scores 2009

Source: Local Knowledge; Annual Business Inquiry; GVA by NUTS 3; Annual Survey of Hours and Earnings;

National Statistics website (Nomis: www.nomisweb.co.uk).

<u>Note</u>

- Essex is within the top twenty areas in Great Britain for levels of economic competitiveness

9. Economic scale

Economic scale (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**GB=100**	**Nat. Rank**
1	Hertfordshire	254.51	8
2	Essex CC	248.88	10
3	Norfolk	157.13	22
4	Suffolk	138.02	28
5	Cambridgeshire CC	134.96	30
6	Bedfordshire CC	75.1	55
7	Peterborough	47.71	86
8	Luton	42.39	96
9	Southend-on-Sea	28.91	109
10	Thurrock	26.41	112
Great Britain : 100			

National top 10 ranking

Economic scale (2008)		
NUTS 3 (incl. Counties)	**GB=100**	**Nat. Rank**
Inner London - West	957.41	1
Inner London - East	548.06	2
Outer London - West and North West	395	3
Greater Manchester South	345.2	4
Hampshire CC	271.83	5
Surrey	265.75	6
Kent CC	259.81	7
Hertfordshire	254.51	8
Berkshire	249.57	9
Essex CC	248.88	10

Economic Scale indicates the size of an areas economy. It is created by weighting the areas GVA (Gross Value Added) by the areas employment. These two indicators are then indexed to the Great Britain average.

Source: Local Knowledge; Annual Business Inquiry; GVA by NUTS 3

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

<u>Note</u>

- Essex has the 10th largest economy in Great Britain

10. GVA (workplace based)

Gross Value Added (2007)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**£million**	**Nat. Rank**
1	Hertfordshire	25234	8
2	Essex CC	23444	9
3	Norfolk	13932	24
4	Cambridgeshire CC	12598	27
5	Suffolk	12435	28
6	Bedfordshire CC	7093	52
7	Peterborough	4404	76
8	Luton	3983	88
9	Southend-on-Sea	2547	109
10	Thurrock	2358	112
Great Britain : 1.18863e+006			

National top 10 ranking

Gross Value Added (2007)		
NUTS 3 (incl. Counties)	**£million**	**Nat. Rank**
Inner London - West	112012	1
Inner London - East	59545	2
Outer London - West and North West	39414	3
Greater Manchester South	30718	4
Surrey	26471	5
Berkshire	25571	6
Hampshire CC	25567	7
Hertfordshire	25234	8
Essex CC	23444	9
Kent CC	23114	10

The level of Gross Value Added (which can provide an indication of the level of productivity) generated. Gross Value Added indicates the economic activity within a region by measuring the production of goods and services. Estimates of workplace based GVA allocate income to the region in which commuters work

Source: Local Knowledge; GVA by NUTS 3 areas at current basic prices

Notes: Source: National Statistics website: www.statistics.gov.uk

Note

- Essex has the 9th highest level of GVA (which can provide an indication of the level of productivity) in Great Britain

11. GVA per head (workplace based)

Gross Value Added per head (2007)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**per head**	**Nat. Rank**
1	Peterborough	26968	8
2	Hertfordshire	23669	14
3	Luton	21100	27
4	Cambridgeshire CC	21089	28
5	Suffolk	17529	51
6	Bedfordshire CC	17429	52
7	Essex CC	17032	58
8	Norfolk	16573	61
9	Southend-on-Sea	15728	75
10	Thurrock	15717	76
Great Britain : 20080.9			

National top 10 ranking

Gross Value Added per head (2007)		
NUTS 3 (incl. Counties)	**per head**	**Nat. Rank**
Inner London - West	101182	1
Edinburgh, City of	32697	2
Inner London - East	31451	3
Berkshire	30970	4
Swindon	30116	5
Milton Keynes	29112	6
Glasgow City	27009	7
Peterborough	26968	8
Bristol, City of	26675	9
Nottingham	26106	10

The level of Gross Value Added (which can provide an indication of the level of productivity) per person. Gross Value Added indicates the economic activity by measuring the production of goods and services. This indicator is an official Performance Indicator - ECR6a. Estimates of workplace based GVA allocate income to the region in which commuters work

Source: Local Knowledge; GVA by NUTS 3 areas at current basic prices; Annual Survey of Hours and Earnings

National Statistics website: www.statistics.gov.uk

Note

- Although Essex has a high level of total GVA, per head of population Essex ranks averagely in comparison to other areas in Great Britain

Industrial structure

12. Employment in knowledge-driven sector

Proportion of employment in Knowledge-driven sectors (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Luton	29.38	12
2	Hertfordshire	29.31	13
3	Peterborough	26.86	27
4	Southend-on-Sea	26.31	28
5	Cambridgeshire CC	24.76	33
6	Essex CC	22.62	46
7	Bedfordshire CC	20.8	54
8	Suffolk	20.74	55
9	Norfolk	17.11	85
10	Thurrock	13.98	111
Great Britain : 24.58			

National top 10 ranking

Proportion of employment in Knowledge-driven sectors (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - West	48.15	1
Inner London - East	39.71	2
Berkshire	36.6	3
Milton Keynes	32.84	4
Outer London - West and North West	31.23	5
Aberdeen City, Aberdeenshire and North East Moray	31.06	6
Surrey	31.05	7
Edinburgh, City of	31.03	8
Bristol, City of	30.44	9
Leeds	29.72	10

This workplace based figure provides the proportion of all employed persons working in the following "Knowledge-driven" sectors: Aerospace (35.3), Electric machinery and optical equipment (30, 32, 33), Printing, publishing, recorded media (22.11-22.22), Chemicals (24), Energy (11, 23, 40, 41), Telecomms, computer & related services, R&D (72, 73, 64.2, 64.12), Finance, business services (65, 67, 74 (excluding 74.7, 74.82)), Air transport services (62), & Recreational & cultural services (92). All figures in brackets are 2003 Standard Industrial Classification (SIC) codes.

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has an average level of employment in knowledge-driven sectors

13. Employment in creative industries (workplace based)

Proportion of employment in Creative industries (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Peterborough	8.5	16
2	Cambridgeshire CC	8	22
3	Hertfordshire	7.98	23
4	Essex CC	7.49	27
5	Bedfordshire CC	7.23	32
6	Thurrock	6.02	57
7	Norfolk	6.01	58
8	Suffolk	5.87	62
9	Southend-on-Sea	5.35	78
10	Luton	4.59	102
Great Britain : 7.63			

National top 10 ranking

Proportion of employment in Creative industries (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - West	16.36	1
Berkshire	12.97	2
Surrey	12.64	3
Inner London - East	12.11	4
Aberdeen City, Aberdeenshire and North East Moray	11.77	5
Buckinghamshire CC	11.15	6
Solihull	10.96	7
Milton Keynes	10.77	8
Outer London - West and North West	10.46	9
Hampshire CC	9.55	10

This workplace based figure provides the proportion of employment in Creative Industries sector. The cultural/creative industries are defined according to the DCMS as the following sectors: Manufacture of knitted and crocheted hosiery (17.71), pullovers/cardigans (17.72), leather clothes (18.10), workwear, (18.21), other outerwear (18.22), underwear (18.23), other wearing apparel and accessories (18.24) and the dressing and dyeing of fur (18.30). Manufacture of footwear (19.30), Publishing of books (22.11), Publishing of newspapers (22.12), Publishing of journals and periodicals (22.13), Publishing of sound recordings (22.14), Other publishing (22.15), Reproduction of sound recording (22.31), Reproduction of video recording (22.32), Reproduction of computer media (22.33), Other retail sale in specialized stores (52.48), Retail sale of second-hand goods (52.50), Publishing of software (72.21), Other software consultancy and supply (72.22), Architectural/ engineering activities (74.20), Advertising (74.40) Photographic activities (74.81), Other business activities NEC (74.87), Motion picture and video production (92.11), Motion picture and video distribution (92.12), Motion picture projection (92.13), Radio and television activities (92.20), Artistic and literary creation etc (92.31), Operation of arts facilities (92.32), Other entertainment categories NEC (92.34), News agency activities (92.40), and Other recreational activities NEC (97.72). All figures in brackets are 2003 Standard Industrial Classification (SIC) codes.

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- The proportion of employment in creative industries in Essex is below the average for Great Britain

14. Employment in high-tech industries

Proportion of employment in high-tech industries (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Luton	3.21	1
2	Cambridgeshire CC	1.83	10
3	Southend-on-Sea	1.72	14
4	Essex CC	1.57	17
5	Hertfordshire	0.93	38
6	Bedfordshire CC	0.87	41
7	Norfolk	0.64	57
8	Suffolk	0.6	59
9	Peterborough	0.22	102
10	Thurrock	0.05	123
Great Britain : 0.69			

National top 10 ranking

Proportion of employment in high-tech industries (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Luton	3.21	1
South Lanarkshire	2.7	2
West Lothian	2.46	3
Telford and Wrekin	2.43	4
Medway	2.42	5
Inverclyde, East Renfrewshire and Renfrewshire	2.36	6
Gloucestershire	2.07	7
Coventry	1.95	8
Flintshire and Wrexham	1.86	9
Cambridgeshire CC	1.83	10

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex and Southend are within the top 20 areas of Great Britain for the proportion of employment in high-tech industries

15. Employment in research and design

Proportion of employment in research and development (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Cambridgeshire CC	3.09	2
2	Hertfordshire	1.25	8
3	Bedfordshire CC	0.81	13
4	Essex CC	0.48	28
5	Southend-on-Sea	0.44	29
6	Norfolk	0.29	43
7	Suffolk	0.26	46
8	Peterborough	0.08	81
9	Luton	0.01	117
10	Thurrock	0.01	118
Great Britain : 0.42			

National top 10 ranking

Proportion of employment in research and development (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
East Lothian and Midlothian	3.18	1
Cambridgeshire CC	3.09	2
Wiltshire CC	1.97	3
Oxfordshire	1.93	4
Berkshire	1.88	5
Eilean Siar (Western Isles)	1.49	6
Cheshire CC	1.48	7
Hertfordshire	1.25	8
South Nottinghamshire	1.22	9
Swindon	0.96	10

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has a higher than average level of employment in research and development

15.5. Employment in research and design by local authorities

Proportion of employment in research and development (2008)				
Filtered by Region : East of England				
Rank.	**District (incl. 2009 Unitaries)**	**Region**	**%**	**Nat. Rank**
26	Maldon	East of England	0.11	164
27	Broxbourne	East of England	0.1	169
28	Fenland	East of England	0.09	171
29	Great Yarmouth	East of England	0.08	184
30	Peterborough	East of England	0.08	187
31	Basildon	East of England	0.08	188
32	Ipswich	East of England	0.08	191
33	King's Lynn and West Norfolk	East of England	0.07	194
34	Braintree	East of England	0.06	212
35	Colchester	East of England	0.04	234
36	Brentwood	East of England	0.04	240
37	Watford	East of England	0.04	244
38	Rochford	East of England	0.04	247
39	Mid Suffolk	East of England	0.03	254
40	Norwich	East of England	0.03	262
41	Tendring	East of England	0.02	291
42	Broadland	East of England	0.02	309
43	North Norfolk	East of England	0.02	310
44	Dacorum	East of England	0.01	318
45	Luton	East of England	0.01	322
46	Thurrock	East of England	0.01	324
47	Castle Point	East of England	0.01	337
Great Britain : 0.42				

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk).

The proportion of employment in research and development. (total number of people in R&D/total in employment)*100

16. Employment in wholesale and retail sectors

Proportion of employment in Wholesale & Retail sectors (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Thurrock	33.56	1
2	Hertfordshire	20.62	3
3	Peterborough	20.07	5
4	Bedfordshire CC	19.62	9
5	Norfolk	18.73	23
6	Essex CC	18.57	28
7	Suffolk	17.17	56
8	Southend-on-Sea	17.11	60
9	Cambridgeshire CC	16.17	86
10	Luton	15.45	97
Great Britain : 16.61			

National top 10 ranking

Proportion of employment in Wholesale & Retail sectors (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Thurrock	33.56	1
Milton Keynes	21.4	2
Hertfordshire	20.62	3
Bradford	20.49	4
Peterborough	20.07	5
Swindon	19.87	6
Somerset	19.75	7
Dudley and Sandwell	19.62	8
Bedfordshire CC	19.62	9
Herefordshire, County of	19.51	10

This workplace based figure provides the proportion of employment in wholesale and retail sectors.This sector is in line with the broad sectors adopted by the Sector Skills Development Agency.The wholesale and retail sectors can be defined as: (50) : Sale,maintenance/repair motor vehicles, (51) : Wholesale trade/commission trade, etc, (52) : Retail trade, except of motor vehicles. The figures in brackets are 2003 Standard Industrial Classification (SIC) codes

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

<u>Note</u>

- Thurrock has the highest proportion of employment in the wholesale and retail sector in Great Britain
- Essex is slightly above average

17. Employment in transport, storage and communications sectors

Proportion of employment in Transport, Storage & Communication sectors (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Thurrock	13.83	2
2	Luton	13.36	3
3	Suffolk	7.59	17
4	Peterborough	6.64	29
5	Essex CC	6.49	32
6	Bedfordshire CC	5.85	40
7	Hertfordshire	5.37	51
8	Norfolk	4.01	100
9	Cambridgeshire CC	3.97	102
10	Southend-on-Sea	3.2	123

National top 10 ranking

Great Britain : 5.81

Proportion of employment in Transport, Storage & Communication sectors (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Outer London - West and North West	14.63	1
Thurrock	13.83	2
Luton	13.36	3
Shetland Islands	12.34	4
Darlington	10.26	5
Orkney Islands	9.81	6
Halton and Warrington	9.55	7
West Sussex	9.36	8
Milton Keynes	9.05	9

This workplace based figure provides the proportion of employment in the following transport, storage and communication sectors: (60) : Land transport; transport via pipelines, (61) : Water transport, (62) : Air transport, (63) : Supporting/auxiliary transport,etc, (64) : Post and telecommunications The figures in brackets are 2003 Standard Industrial Classification (SIC) codes.

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Thurrock has the 2nd highest proportion of employment in transport storage and communication in Great Britain, after Outer London – West and North.

18. Employment in high and medium high technology sectors

Proportion of total employee jobs in High & Medium High Technology sectors (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Luton	3.21	1
2	Cambridgeshire CC	1.83	10
3	Southend-on-Sea	1.72	14
4	Essex CC	1.57	17
5	Hertfordshire	0.93	38
6	Bedfordshire CC	0.87	41
7	Norfolk	0.64	57
8	Suffolk	0.6	59
9	Peterborough	0.22	102
10	Thurrock	0.05	123
Great Britain : 0.69			

National top 10 ranking

Proportion of total employee jobs in High & Medium High Technology sectors (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Luton	3.21	1
South Lanarkshire	2.7	2
West Lothian	2.46	3
Telford and Wrekin	2.43	4
Medway	2.42	5
Inverclyde, East Renfrewshire and Renfrewshire	2.36	6
Gloucestershire	2.07	7
Coventry	1.95	8
Flintshire and Wrexham	1.86	9
Cambridgeshire CC	1.83	10

People employed in high and medium technology sectors includes SIC codes (33) manufacturing medical, precision instruments; (32) manufacturing radio, TV/communications equipment, (30) manufacturing office machinery and computers. All figures in brackets are 2003 Standard Industrial Classification (SIC).

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Southend and Essex have a high proportion of total employee jobs in high and medium high technology sectors
- Thurrock has one of the lowest levels in Great Britain

19. Knowledge driven sector, share of national knowledge driven production employment (workplace based)

Share of national Knowledge driven production employment (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Essex CC	2.28	6
2	Hertfordshire	2.17	7
3	Cambridgeshire CC	1.36	20
4	Suffolk	1.2	27
5	Norfolk	0.91	37
6	Luton	0.51	65
7	Bedfordshire CC	0.43	78
8	Peterborough	0.32	97
9	Thurrock	0.21	108
10	Southend-on-Sea	0.19	110
Great Britain : 100			

National top 10 ranking

Share of national Knowledge driven production employment (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - West	4.06	1
Lancashire CC	3.84	2
Inner London - East	3.44	3
Hampshire CC	3.33	4
Aberdeen City, Aberdeenshire and North East Moray	3.09	5
Essex CC	2.28	6
Hertfordshire	2.17	7
Greater Manchester South	2.05	8
North and North East Somerset, South Gloucestershire	1.98	9
Kent CC	1.92	10

The share of employment on a national basis by knowledge driven production. Knowledge driven production includes Aerospace (35.3), Electric machinery and optical equipment (30, 32, 33), Printing, publishing, recorded media (22.11-22.22), Chemicals (24), & Energy (11, 23, 40, 41).

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has the 6th highest share of knowledge driven production employment in Great Britain

20. Knowledge driven sector, share of national knowledge driven sector employment (workplace based)

Share of national Knowledge driven sector employment (2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Hertfordshire	2.26	8
2	Essex CC	1.81	11
3	Cambridgeshire CC	1.06	28
4	Suffolk	0.92	30
5	Norfolk	0.86	35
6	Bedfordshire CC	0.49	57
7	Peterborough	0.41	63
8	Luton	0.38	70
9	Southend-on-Sea	0.26	93
10	Thurrock	0.12	115
Great Britain : 100			

National top 10 ranking

Share of national Knowledge driven sector employment (2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - West	11.17	1
Inner London - East	5.85	2
Outer London - West and North West	3.65	3
Greater Manchester South	3.11	4
Berkshire	2.59	5
Surrey	2.45	6
Hampshire CC	2.37	7
Hertfordshire	2.26	8
Leeds	1.89	9
Outer London - South	1.87	10

The share of employment on a national basis by knowledge driven sector. Knowledge driven sector employment includes Aerospace (35.3), Electric machinery and optical equipment (30, 32, 33), Printing, publishing, recorded media (22.11-22.22), Chemicals (24), Energy (11, 23, 40, 41), Telecomms, computer & related services, R&D (72, 73, 64.2, 64.12), Finance, business services (65, 67, 74 (excluding 74.7, 74.82)), Air transport services (62), & Recreational & cultural services (92).

Source: Local Knowledge; Annual Business Inquiry

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has the11th highest share of knowledge driven sector employment in Great Britain

Labour Market

21. Proportion of economically active residents

Proportion of working age population who are economically active (residence based) (May 2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Cambridgeshire CC	84.2	10
2	Suffolk	84.13	11
3	Bedfordshire CC	83.29	18
4	Hertfordshire	82.71	27
5	Norfolk	82.32	31
6	Southend-on-Sea	81.7	37
7	Thurrock	81.4	42
8	Essex CC	80.6	52
9	Peterborough	77.1	91
10	Luton	75.8	103
Great Britain : 79.03			

National top 10 ranking

Proportion of working age population who are economically active (residence based) (May 2009)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Orkney Islands	88.6	1
Shetland Islands	88.3	2
Swindon	86.3	3
South and West Derbyshire	85.95	4
Wiltshire CC	85.58	5
Caithness & Sutherland and Ross & Cromarty	85.5	6
Hampshire CC	84.8	7
Inverness & Nairn and Moray, Badenoch & Strathspey	84.6	8
Scottish Borders	84.6	8
Cambridgeshire CC	84.2	10

Source: Local Knowledge; Annual Population Survey

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- The percentage of economically active residents in Essex is higher than the average for Great Britain, but low for the eastern region

22. Proportion of resident population in employment (employment rate)

Working age population in employment (residence based) (May 2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Hertfordshire	80.2	7
2	Cambridgeshire CC	79.7	10
3	Norfolk	77.82	23
4	Essex CC	76.08	44
5	Bedfordshire CC	72.39	76
6	Southend-on-Sea	71.3	87
7	Thurrock	69.5	98
8	Luton	69.19	100
9	Peterborough	69.12	101
10	Suffolk	65.87	116
Great Britain : 73.49			

National top 10 ranking

Working age population in employment (residence based) (May 2009)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
South West Wales	87	1
Gloucestershire	86.2	2
Blackpool	83.2	3
Hartlepool and Stockton-on-Tees	81.53	4
Lochaber, Skye & Lochalsh and Argyll and the Islands	80.72	5
Walsall and Wolverhampton	80.55	6
Hertfordshire	80.2	7
Edinburgh, City of	79.92	8
Blackburn with Darwen	79.91	9
Cambridgeshire CC	79.7	10

Source: Local Knowledge; Annual Population Survey

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

<u>Note</u>

- The employment rate in Essex is above the average for Great Britain

23. Employment rate change (2005-2008)

Change in employment rate (2005-2008)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Suffolk	2.03	18
2	Bedfordshire CC	0.53	42
3	Luton	0.08	52
4	Southend-on-Sea	-0.21	56
5	Hertfordshire	-1.81	90
6	Norfolk	-2.04	95
7	Thurrock	-2.05	96
8	Cambridgeshire CC	-2.08	97
9	Peterborough	-2.1	98
10	Essex CC	-2.22	100
Great Britain : -0.29			

National top 10 ranking

Change in employment rate (2005-2008)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inverness & Nairn and Moray, Badenoch & Strathspey	6.59	1
Southampton	6.31	2
Inner London - East	5.05	3
Derby	4.94	4
Durham CC	4.89	5
East Derbyshire	4.26	6
West Cumbria	4.18	7
West Lothian	3.71	8
Falkirk	3.63	9
South Lanarkshire	3.22	10

Source: Local Knowledge; Annual Population Survey

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Since 2005, Essex is within the 30 worst performing employment rates in Great Britain

24. Labour market score

Labour market score (May 2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**GB=100**	**Nat. Rank**
1	Suffolk	109.39	8
2	Cambridgeshire CC	108.81	11
3	Norfolk	106.68	22
4	Hertfordshire	106.5	23
5	Bedfordshire CC	106.06	27
6	Southend-on-Sea	103.06	53
7	Essex CC	102.93	54
8	Thurrock	101.42	59
9	Peterborough	97.31	89
10	Luton	93.75	102
Great Britain : 100			

National top 10 ranking

Labour market score (May 2009)		
NUTS 3 (incl. Counties)	**GB=100**	**Nat. Rank**
Shetland Islands	119.07	1
Orkney Islands	117.98	2
Caithness & Sutherland and Ross & Cromarty	113.87	3
Aberdeen City, Aberdeenshire and North East Moray	111.58	4
Wiltshire CC	110.48	5
Hampshire CC	110.24	6
Inverness & Nairn and Moray, Badenoch & Strathspey	109.76	7
Suffolk	109.39	8
Buckinghamshire CC	109.37	9
Herefordshire, County of	109.08	10

This residence based indicator provides the proportion of people aged 16-59/64 (men/women) in employment indexed to the national average to provide a comparable figure in relation to the national trend

Source: Local Knowledge; Annual Population Survey

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has a higher than national average labour market score, but low in comparison to the rest of the Eastern region

25. Manager and senior official workers (resident based)

Proportion of Manager & Senior Official occupations amongst employed workforce (workplace based) (May 2009)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Hertfordshire	18.47	9
2	Cambridgeshire CC	16.87	17
3	Essex CC	16.33	23
4	Bedfordshire CC	15.66	35
5	Norfolk	15.31	41
6	Suffolk	15.28	43
7	Peterborough	14.35	60
8	Thurrock	12.42	95
9	Southend-on-Sea	12.41	97
10	Luton	10.38	125
Great Britain : 15.73			

National top 10 ranking

Proportion of Manager & Senior Official occupations amongst employed workforce (workplace based) (May 2009)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Inner London - West	23.26	1
Berkshire	22.04	2
Solihull	21.41	3
Milton Keynes	20.99	4
Inner London - East	20.84	5
Buckinghamshire CC	18.99	6
Surrey	18.92	7
Cheshire CC	18.72	8
Hertfordshire	18.47	9
Outer London - West and North West	18.14	10

The proportion of the working age population who are employed in managerial and senior official occupations (1) based on place of work. The figure in brackets is a Standard Occupational Classification 2000 (SOC) code. SOC codes are nationally recognised occupational groupings designed to capture type of work and the associated skills necessary for the job. This major SOC group includes managers in the following occupations: Corporate & Senior Officials; Production managers; Functional managers; Quality and Customer Care; Financial Instititutions and Office; Distribution, Storage and Retail; Protective Service Officers; Health and Social Service; Farming; Horticulture; Forestry and associated fields; Hospitality & Leisure and Other Service Industries managers.

Source: Local Knowledge; Annual Population Survey

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has a high proportion of manager and senior officials within the workforce

26. Unemployment rate

Unemployment rate (May 2010)			
Filtered by Region : Eastern			
Rank.	**NUTS 3 (incl. Counties)**	**%**	**Nat. Rank**
1	Peterborough	5.3	21
2	Luton	4.9	27
2	Southend-on-Sea	4.9	27
4	Thurrock	4.6	38
5	Norfolk	3.43	76
6	Bedfordshire CC	3.15	90
7	Essex CC	3.15	91
8	Suffolk	2.93	99
9	Hertfordshire	2.81	103
10	Cambridgeshire CC	2.35	115
Great Britain : 3.91			

National top 10 ranking

Unemployment rate (May 2010)		
NUTS 3 (incl. Counties)	**%**	**Nat. Rank**
Kingston upon Hull, City of	8.3	1
Birmingham	7.5	2
Walsall and Wolverhampton	7.24	3
Liverpool	7	4
South Teesside	6.91	5
Leicester	6.4	6
Glasgow City	6.3	7
Dudley and Sandwell	6.23	8
East Ayrshire and North Ayrshire Mainland	6.02	9
Inner London - East	5.81	10

The proportion of people aged 16-59/64 (men/women) claiming Job Seekers Allowance or National Insurance Credits. The higher the score, the more unemployed in a given area. This indicator is an official Performance Indicator - ECR2a

Source: Local Knowledge; Claimant count with rates and proportions

Notes: Source: National Statistics website (Nomis: www.nomisweb.co.uk)

Note

- Essex has a low unemployment rate, lower than the Great Britain average

Connectivity Score

Rank	Geography	Connectivity score (GB=100) 2005
1	London Central	1329.48
2	London East	523.26
3	London West	405.78
4	London North	352.60
5	London South	313.55
6	Greater Manchester	186.61
7	Birmingham & Solihull	158.72
8	Hertfordshire	140.06
9	Surrey	135.05
10	Greater Merseyside	127.05
11	The Black Country	118.98
12	Tyne & Wear	92.43
13	Berkshire	90.57
14	Essex	78.85
15	West Yorkshire	76.72
16	South Yorkshire	73.87
17	Tees Valley	71.76
18	Bedfordshire & Luton	71.30
19	Kent & Medway	69.90
20	West of England	65.84
21	Lancashire	65.11
22	Hampshire & The Isle of Wight	64.52
23	Sussex	60.37
24	Cheshire & Warrington	54.93
25	Staffordshire	44.55
26	Derbyshire	44.09
27	Coventry & Warwickshire	42.29
28	Northamptonshire	41.63
29	Milton Keynes, Oxfordshire & Buckinghamshire	39.77
30	Leicestershire	38.62
31	Nottinghamshire	37.89
32	Cambridgeshire	28.73

33	Gloucestershire	25.49
34	South Western Scotland	21.07
35	Suffolk	20.44
36	Wiltshire	20.31
37	Herefordshire & Worcestershire	18.41
38	Humberside	14.43
39	Bournemouth, Dorset & Poole	14.20
40	Shropshire	13.77
41	Eastern Wales	13.03
42	Eastern Scotland	12.89
43	Somerset	11.31
44	North Yorkshire	11.22
45	West Wales and the Valleys	9.75
46	Devon & Cornwall	9.52
47	Cumbria	8.98
48	County Durham	8.06
49	Norfolk	7.46
50	Northumberland	4.55
51	Lincolnshire & Rutland	4.49
52	North Eastern Scotland	3.40
53	Highlands and Islands	2.35

The connectivity index is based on proximity to and presence of airports; number of rail stations (excluding the underground); ports and motorway junctions. The resulting figure provides a indication of the areas connectivity, with figures over 100 indicating a higher than average level of connectivity

<u>Calculation method</u>
(((Number of ports within the district)+(number of airports within the district)+(number of train stations within the district)+(number of motorway junctions within the district)(weighted by proximity to major airports (gatwick, edinburgh, glasgow, bristol, stansted, birmingham)/land area)/(GB Sum of above))*100, The district figures which fall within each sub-region and summed and divided by the national average to provide a sub-regional score.

Source: AA

Appendix 5: Worldwide wind farm development by MW capability, 2010

Country	Concept	Submitted	Authorised	Construction	Generating	Dormant	Generating and under construction	Proposed
United Kingdom	41039	2225	2228	1155	1176	950	2331	45492
Denmark	6325	36	418	207	656	0	863	6779
Germany	6325	17507	8319	448	72	200	520	32151
Netherlands	838	719	3250	0	247	21106	247	4807
Belgium	894	0	651	165	30	0	195	1545
Sweden	4360	1995	1266	0	149	48	149	7621
Italy	5744	2222	162	92	0	0	92	8128
China	3692	206	2045	0	47	0	47	5943
Finland	4735	892	365	0	30	0	30	5992
Ireland	0	1794	1100	0	25	0	25	2894
Japan	2	0	0	0	25	250000	25	2
Norway	8731	200	365	0	2	0	2	9296
United States	42241	1200	768	0	0	60000	0	44209
Brazil	11200	0	0	0	0	0	0	11200
Canada	7704	1430	396	0	0	0	0	9530
Spain	8692	0	0	0	0	0	0	8692
Greece	0	5906	0	0	0	0	0	5906
France	4327	1455	105	0	0	0	0	5887
Estonia	200	0	1000	0	0	0	0	1200
Egypt	1000	0	0	0	0	0	0	1000
Croatia	840	0	0	0	0	0	0	840
Lithuania	800	0	0	0	0	0	0	800
Romania	300	0	500	0	0	0	0	800
Taiwan	600	0	0	0	0	0	0	600
Albania	539	0	0	0	0	0	0	539
Portugal	306	0	0	0	0	0	0	306
Bangladesh	200	0	0	0	0	0	0	200
Malta	200	0	0	0	0	0	0	200
Maldives	0	0	75	0	0	0	0	75
Azerbaijan	0	0	0	0	0	0	0	0
Latvia	0	0	0	0	0	0	0	0
Poland	0	0	0	0	0	0	0	0
Russia	0	0	0	0	0	0	0	0
Tunisia	0	0	0	0	0	0	0	0

Source: 4COffshore ltd (www.4coffshore.com)

Appendix 6: UK port statistics

Total port traffic 2009, all foreign and domestic traffic, by million tonnes

UK Rank	Port	Tonnage (Millions)	Percentage of all UK ports
1	Grimsby and Immingham	54.71	10.76
2	London	45.44	8.94
3	Milford Haven	39.29	7.73
4	Tees and Hartlepool	39.16	7.70
5	Southampton	37.23	7.32
6	Forth	36.69	7.22
7	Haven Gateway Ports	32.17	6.33
8	Liverpool	29.89	5.88
9	Felixstowe	26.42	5.20
10	Dover	25.08	4.93
11	Medway	13.15	2.59
12	Clyde	12.48	2.45
13	Belfast	12.05	2.37
14	Sullom Voe	11.25	2.21
15	Hull	9.77	1.92
16	Rivers Hull and Humber	9.47	1.86
17	Bristol	9.00	1.77
18	Orkney	8.44	1.66
19	Manchester	6.67	1.31
20	Glensanda	5.59	1.10
21	Port Talbot	5.16	1.01
22	Aberdeen	4.57	0.90
23	Larne	4.30	0.85
24	Portsmouth	3.96	0.78
25	Tyne	3.54	0.70
26	Heysham	3.12	0.61
27	Harwich	2.94	0.58
28	Cromarty Firth	2.86	0.56
29	Holyhead	2.85	0.56
30	Ipswich	2.81	0.55
31	Newport	2.73	0.54
32	Cairnryan	2.57	0.51
33	Cardiff	1.99	0.39
34	Plymouth	1.94	0.38
35	Warrenpoint	1.84	0.36
36	Shoreham	1.74	0.34
37	Goole	1.64	0.32
38	Londonderry	1.62	0.32
39	Ramsgate	1.59	0.31
40	Fleetwood	1.33	0.26
41	Newhaven	1.28	0.25
42	Stranraer	1.18	0.23
43	Poole	1.13	0.22

44	River Trent	1.10	0.22
45	Dundee	0.81	0.16
46	Peterhead	0.80	0.16
47	Fowey	0.77	0.15
48	Boston	0.70	0.14
49	Great Yarmouth	0.66	0.13
50	Sunderland	0.65	0.13
51	Ballylumford	0.53	0.10
52	Swansea	0.40	0.08
53	Fishguard	0.37	0.07
-	All major ports	497.26	97.79
-	Minor ports	11.22	2.20
-	All UK ports	508.49	100.00

Source: DfT statistics, 2009

Major port traffic for lo lo containers, by million tonnes, 2009

UK Rank	Port	Tonnage (millions)	Percentage of all UK ports
1	Haven Gateway Ports	22.09	41.06
2	Felixstowe	22.06	41.02
3	Southampton	7.60	14.13
4	London	7.27	13.52
5	Liverpool	4.20	7.80
6	Medway	3.19	5.93
7	Forth	2.19	4.06
8	Belfast	1.58	2.94
9	Tees and Hartlepool	1.23	2.29
10	Hull	1.06	1.97
11	Grimsby and Immingham	0.98	1.82
12	Bristol	0.70	1.30
13	Clyde	0.45	0.83
14	Goole	0.42	0.78
15	Portsmouth	0.22	0.41
16	Tyne	0.17	0.32
17	Aberdeen	0.13	0.24
18	Warrenpoint	0.12	0.23
19	Cardiff	0.11	0.20
20	Orkney	0.06	0.11
21	Poole	0.03	0.05
22	Harwich	0.02	0.04
	UK total	53.79	100.00

Source: DfT statistics, 2009

Major port traffic for roll on / roll off, by million tonnes, 2009

UK Rank	Port	Tonnage (millions)	Percentage of UK total
1	Dover	24.70	24.14
2	Grimsby and Immingham	12.88	12.59
3	Haven Gateway Ports	7.46	7.30
4	Liverpool	6.53	6.38
5	London	6.04	5.90
6	Belfast	4.51	4.41
7	Felixstowe	4.32	4.22
8	Larne	4.28	4.18
9	Hull	3.41	3.33
10	Heysham	2.96	2.89
11	Portsmouth	2.85	2.78
12	Holyhead	2.66	2.60
13	Cairnryan	2.57	2.51
14	Harwich	2.40	2.34
15	Tees and Hartlepool	2.24	2.19
16	Ramsgate	1.57	1.54
17	Warrenpoint	1.33	1.30
18	Fleetwood	1.33	1.30
19	Stranraer	1.18	1.15
20	Newhaven	1.05	1.03
21	Southampton	0.94	0.92
22	Milford Haven	0.89	0.87
23	Poole	0.80	0.78
24	Ipswich	0.75	0.74
25	Tyne	0.67	0.66
26	Bristol	0.57	0.56
27	Fishguard	0.37	0.36
28	Medway	0.35	0.35
29	Forth	0.31	0.30
30	Aberdeen	0.21	0.21
31	Orkney	0.12	0.11
32	Plymouth	0.08	0.08
	UK total	102.32	100.00

Source: DfT statistics, 2009

Ro-Ro ferry passengers on short sea routes

UK Rank	Port	Number of passengers (thousands)	Percentage of UK total international passengers
1	Dover	13783.32	60.35
2	Portsmouth	2087.49	9.14
3	Holyhead	1996.22	8.74
4	Hull	965.60	4.23
5	Haven Gateway Ports	609.78	2.67
6	Tyne	594.52	2.60
7	Harwich	593.16	2.60
8	Plymouth	570.59	2.50
9	Fishguard	553.63	2.42
10	Poole	474.15	2.08
11	Milford Haven	344.98	1.51
12	Newhaven	283.94	1.24
13	Ramsgate	221.69	0.97
14	Liverpool	172.15	0.75
15	Grimsby and Immingham	80.88	0.35
16	Forth	74.11	0.32
17	Felixstowe	14.61	0.06
18	Weymouth	14.52	0.06
19	London	6.72	0.03
20	Other east coast ports	3.78	0.02
21	Other west coast ports	2.13	0.01
22	Ipswich	2.02	0.01
23	Folkestone	0.00	0.00
24	Southampton	0.00	0.00
25	Swansea	0.00	0.00
26	Mostyn	0.00	0.00
27	Fleetwood	0.00	0.00
28	Lerwick	0.00	0.00
	All port areas	22840.18	100.00

Source: DfT statistics, 2009

Appendix 7: UK airports passenger and freight statistics, 2009

Number of airport passengers, 2009

UK rank	Airport	No. passengers
1	HEATHROW	65,906,641
2	GATWICK	32,360,773
3	STANSTED	19,949,689
4	MANCHESTER	18,630,394
5	LUTON	9,115,327
6	BIRMINGHAM	9,093,201
7	EDINBURGH	9,043,452
8	GLASGOW	7,213,397
9	BRISTOL	5,615,200
10	LIVERPOOL	4,879,468
11	EAST MIDLANDS INTERNATIONAL	4,652,691
12	NEWCASTLE	4,568,619
13	BELFAST INTERNATIONAL	4,536,498
14	ABERDEEN	2,983,793
15	LONDON CITY	2,796,890
16	BELFAST CITY (GEORGE BEST)	2,621,733
17	LEEDS BRADFORD	2,552,597
18	PRESTWICK	1,817,286
19	SOUTHAMPTON	1,789,443
20	CARDIFF WALES	1,624,730
21	BOURNEMOUTH	868,445
22	DONCASTER SHEFFIELD	834,636
23	EXETER	789,733
24	INVERNESS	583,374
25	NORWICH	429,542
26	NEWQUAY	347,036
27	CITY OF DERRY (EGLINTON)	345,857
28	HUMBERSIDE	335,149
29	DURHAM TEES VALLEY	288,296
30	BLACKPOOL	276,860
31	SCATSTA	269,754
32	SUMBURGH	139,146
33	KIRKWALL	138,383
34	STORNOWAY	122,475
35	ISLES OF SCILLY (ST.MARYS)	118,695
36	PLYMOUTH	115,254
37	PENZANCE HELIPORT	85,911
38	DUNDEE	72,466
39	LANDS END (ST JUST)	34,442
40	BENBECULA	32,692
41	ISLES OF SCILLY (TRESCO)	32,043
42	ISLAY	26,285
43	WICK	21,460
44	GLOUCESTERSHIRE	20,220
45	BARRA	10,182
46	CAMPBELTOWN	9,389
47	TIREE	8,202
48	KENT INTERNATIONAL	5,335
49	LERWICK (TINGWALL)	4,709
50	SOUTHEND	3,948
51	CAMBRIDGE	1,307
52	OXFORD (KIDLINGTON)	1,297
53	SHOREHAM	1,213
54	LYDD	588
55	COVENTRY	167
56	BIGGIN HILL	0
57	HAWARDEN	0
58	SWANSEA	0
	UK Total	218,126,313

Source: Civil Aviation Authority statistics, 2009

Total airport freight, by tonnes, 2009

UK Rank	Airport	Freight (tonnes)
1	HEATHROW	1277649.7
2	EAST MIDLANDS INTERNATIONAL	255120.8
3	STANSTED	182810.0
4	MANCHESTER	102543.3
5	GATWICK	74679.5
6	KENT INTERNATIONAL	30038.0
7	BELFAST INTERNATIONAL	29803.7
8	LUTON	28643.4
9	EDINBURGH	23791.5
10	PRESTWICK	13385.1
11	BIRMINGHAM	13069.9
12	ABERDEEN	3822.2
13	JERSEY	3672.3
14	GUERNSEY	2901.2
15	NEWCASTLE	2596.6
16	COVENTRY	2439.5
17	GLASGOW	2333.8
18	SCATSTA	751.6
19	ISLE OF MAN	499.5
20	STORNOWAY	475.3
21	INVERNESS	451.7
22	LEEDS BRADFORD	359.3
23	DONCASTER SHEFFIELD	344.1
24	NORWICH	338.8
25	DURHAM TEES VALLEY	297.9
26	ALDERNEY	275.0
27	LIVERPOOL	264.3
28	HUMBERSIDE	240.9
29	ISLAY	228.7
30	BENBECULA	224.3
31	SOUTHAMPTON	209.1
32	CARDIFF WALES	178.3
33	PENZANCE HELIPORT	156.0
34	ISLES OF SCILLY (ST.MARYS)	143.1
35	BELFAST CITY (GEORGE BEST)	137.7
36	KIRKWALL	88.6
37	SUMBURGH	53.3
38	BLACKPOOL	45.8
39	BARRA	29.8
40	ISLES OF SCILLY (TRESCO)	29.1
41	EXETER	24.6
42	TIREE	21.1
43	LANDS END (ST JUST)	19.6
44	CAMBRIDGE	15.1
45	BOURNEMOUTH	3.9
46	WICK	1.5
47	CAMPBELTOWN	0.8
48	GLOUCESTERSHIRE	0.0
49	BRISTOL	0.0
50	SOUTHEND	0.0
51	BIGGIN HILL	0.0
52	CARLISLE	0.0
53	CITY OF DERRY (EGLINTON)	0.0
54	DUNDEE	0.0
55	LERWICK (TINGWALL)	0.0
56	LYDD	0.0
57	PLYMOUTH	0.0
58	SHOREHAM	0.0
59	UNST	0.0
	UK Total	2055209.3

Source: Civil Aviation Authority statistics, 2009