



**INDEPENDENT REVIEW OF
PUBLIC SECTOR
RELOCATION**

**COMPARATIVE ASSESSMENT
OF LOCATIONS**


Prepared for:

Sir Michael Lyons'
Independent Review
of
Public Sector Relocation

FINAL REPORT

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1 EXECUTIVE SUMMARY

1.1 SCOPE

€# This document is the Final Report submitted by King Sturge to Sir Michael Lyons' Independent Review of Public Sector Relocation.

€# This report aims to provide an objective high-level assessment of the relative merits of alternative locations for public sector activity. This information is primarily for the use of the Independent Review Team and those bodies preparing for relocation.

€# King Sturge has considered a wide range of locations against labour market, property market, quality of life and other factors to develop a clear understanding of areas across the United Kingdom.

€# The analysed locations were then assessed in relation to six types of public sector activity in order to provide a hierarchy of areas best suited to each of the scenarios.

€# It is important to note that this assessment is not designed to be an exhaustive list of locations. Areas other than those we have considered may also be suited to particular kinds of public sector activity and the factors we have included in developing our work-type scenarios may not be applicable to activities carried out in some Government departments or public sector bodies. Furthermore, with improved technological infrastructure across the UK, rural locations can now more easily accommodate business activity and this is an issue that should be considered within the wider Government strategy on relocation.

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King Sturge and the Independent Review of Public Sector Relocation expect that this analysis will be used as a reference tool by Departments developing detailed business cases required for successful relocations. We do not anticipate that the information contained in this report will, on its own, provide enough data for departments to select relocation destinations.

1.2 METHODOLOGY

Selection of Locations

102 areas within the United Kingdom were chosen for assessment. The selection was informed by discussion with the Independent Review of Public Sector Relocation and has focussed on the main towns and cities in the United Kingdom outside London and the South East with a population in excess of 100,000. The merits of broadening the scope of the study were considered, but felt to be outweighed by the loss of focus this would entail. Areas in the Eastern region considered to be relatively overheated were excluded from our analysis.

Exceptions to this general approach were made to ensure the inclusion of Sustainable Communities within the South East region; the representation of all regions (some of which would have been under represented due to shortage of towns or cities with populations over 100,000) and the inclusion of a handful of areas within the Eastern region that are not subject to local overheating.

The areas for selection are felt to be representative of the types of location likely to prove suitable for the relocation of public sector activity. However they are not intended to be a definitive list of locations.

The list of areas considered by King Sturge can be found in the relocation tables in Appendices A-F.

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Location Data

- €# King Sturge has collated a core set of comparative information consisting of 12 variables for each of the 102 locations. These factors are:
 - €# District population
 - €# Population growth projection from 2000 – 2010
 - €# Working age population
 - €# Unemployment rate
 - €# Average weekly earnings
 - €# Total employment
 - €# Catchment population (within 30 minutes)
 - €# Built office stock
 - €# Prime office rents (in town)
 - €# Prime office rents (out of town)
 - €# Current surplus in the Government estate
 - €# Future surplus in the Government estate

- €# Other factors largely relating to the skill base were included in each work-type scenario to ensure that the most appropriate labour market was captured.

- €# The full list of factors considered by King Sturge, the sources of that data and the approach taken to their inclusion in our analysis is examined in greater depth in Appendix K of the Full Report.

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Work Type Scenarios

King Sturge developed six scenarios to approximate different types of public sector activity. The scenarios were tested against locations by varying the emphasis or weighting of those variables considered to be of key importance to the delivery of each activity. The work types considered by King Sturge are as follows:

Information Support Contact Centres: this category of activity does not require personnel to have specialised knowledge. The typical functions carried out include handling telephone calls from members of the public, issuing forms, giving standard guidance and data processing. The variables were weighted to allow for the assumption that these activities could be consolidated in large centres due to the scope for staff to work across departments and that there would be little need for staff to travel to London.

Interactive Contact Centres: Staff engaged in these activities require a degree of specialised knowledge particular to the contact centre function being delivered (eg. NHS Direct, Inland Revenue tax queries) and the ability to interact with customers effectively over the telephone. For this scenario the variables were weighted to allow for the higher skills required, the limited scope for consolidation across departments and the low likelihood of staff needing to travel to London.

Back Office processes: includes clerical, routine processing and support functions that do not require higher level skills. This scenario is similar to Information Support Contact Centres. Variables were weighted to allow for the significant scope for consolidating these services across public sector organisations (for example with large sites servicing several organisations' back office needs). No need for staff to commute to London.

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Higher Value Back Office functions: Requires higher level or job specific skills, likely to relate to IT, Human Resources and Finance functions.

Policy functions: Policy making, policy delivery, and regulatory activity were assessed under the policy scenario. These are areas of work in which a significant proportion of staff will have a first degree with some having further qualifications. Some staff will need access to London.

Science functions: This scenario attempts to model the needs of technical specialties within the public sector. A large proportion of staff will have a first degree and a significant proportion will have further qualifications. Access to an appropriate skills base is critical.

A detailed analysis of which factors were included for each scenario and the rationale for their selection can be found in Section 3 of the full report.

1.3 FINDINGS AND COMMENTARY

A scoring and ranking exercise has been carried out for the six relocation scenarios to determine which locations are best suited to accommodate the different work types. Each of the scenarios has generated a materially different hierarchy of locations.

The tables below identify in alphabetical order the top quartile locations for each of the six scenarios.

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- ## The tables include information on the property market capacity of each area based on King Sturge’s survey of each of the local office markets. This work was undertaken because locations that have the required skill base and available workforce but suffer from a poor stock of commercial property and a constrained pipeline of future development may present an obstacle to departments wishing to relocate in the short term. The symbol **P** in the tables denotes locations that fall within the top quartile of our assessment of property market capacity rankings and are therefore well placed to meet departments’ needs in the short-term (1-2 years). Over the longer-term, the majority of locations will be able to meet departments’ needs
- ## The relocation of central Government activities has the potential to contribute to the regional economic balance and improve national competitiveness. Bringing jobs and increased economic activity to those parts of the UK with both labour market flexibility and a skills base suitable for taking on the relocated activity may have a greater beneficial effect (both socially and economically) than if those jobs were transplanted to overheating areas. The tables below include each location’s position on the rankings of deprivation. Rankings exist for each constituent country rather than for the UK as a whole (England ranks 354 districts, Wales ranks 22 districts, Scotland 26 and Northern Ireland 26) therefore the deprivation scoring does not allow direct comparisons across country borders.
- ## These rankings assume that the activity being relocated is of moderate size (approximately 500 people). Significantly different outcomes are achieved if the analysis is flexed to reflect relocations that are substantially larger (say over 1,000) or smaller than this (say below 100). The outcomes for these alternative scenarios can be found in the Appendices A-F.

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Information Support Contact Centre Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Blackburn with Darwen	26 / 354	Peterborough ^P	133 / 354
Bolton	78 / 354	Rhondda Cynon Taff	3 / 22
Bradford	64 / 354	Rochdale	42 / 354
Derry ^P	3 / 26	Rotherham	34 / 354
Dudley	142 / 354	Stockton-on-Tees	111 / 354
Fife	14 / 26	Stoke-on-Trent ^P	22 / 354
Kingston upon Hull	14 / 354	Sunderland	15 / 354
Kirklees	93 / 354	Swansea ^P	12 / 22
Leicester	35 / 354	Telford & Wrekin ^P	96 / 354
Liverpool ^P	5 / 354	Walsall	54 / 354
North Lanarkshire ^P	4 / 26	Wigan	57 / 354
North Tyneside	71 / 354	Wirral	70 / 354
Oldham	61 / 354		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Deprivation Index: Lower numbers indicate more deprived areas.

The typical functions carried out include handling telephone calls from members of the public and issuing forms, giving standard guidance and carrying out data processing.

Key factors included aside from the core variables for this scenario were:

- €# Population with Level 2 skills (GCSE).
- €# Average travel to work time - contact centre workers are often on lower wages and rely on the place of work being within walking distance or accessible by public transport.

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- €# Contact centres are often located in areas with high unemployment rates with a readily available workforce to tap into. Such locations are often areas of manufacturing decline and therefore the proportion of people employed within the manufacturing sector was included.
- €# The proportion of People Workers in each location has been included. People Workers include those involved in personal service occupations, sales and customer services.

Variables given particular weighting for this scenario were:

- €# Unemployment rate
- €# Average travel to work time
- €# Level 2 skills.

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Interactive Contact Centre Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Belfast ^P	2 / 26	Middlesbrough	44 / 354
Blackpool	32 / 354	Newcastle upon Tyne ^P	59 / 354
Bolton	78 / 354	North Lanarkshire ^P	4 / 26
Bradford	64 / 354	North Tyneside	71 / 354
Cardiff ^P	16 / 22	Nottingham ^P	12 / 354
Doncaster	38 / 354	Preston	95 / 354
Exeter	123 / 354	Sheffield	92 / 354
Fife	14 / 26	Stockton-on-Tees	111 / 354
Kingston upon Hull	14 / 354	Sunderland	15 / 354
Kirklees	93 / 354	Swansea ^P	12 / 22
Leicester	35 / 354	Wigan	57 / 354
Liverpool ^P	5 / 354	Wirral	70 / 354
Manchester ^P	7 / 354		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Deprivation Index: Lower numbers indicate more deprived areas.

Staff engaged in these activities require a degree of specialised knowledge particular to the contact centre function being delivered (eg. NHS Direct, Inland Revenue tax queries) and the ability to interact with customers effectively over the telephone.

Key factors included asides from the core variables for this scenario were:

- ⊘# Level 3 Skills (A-level) as the best match for the skills-level required for this scenario.
- ⊘# Average travel to work time remains important for interactive contact centre operations so this variable is again included.

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- €# The proportion of people currently employed within the public sector as skills may be transferable that are suitable for skilled public sector contact centre activity.
- €# As with the information support contact centre scenario, the People Workers occupation share has been included.

Variables given particular weight in this scenario were:

- €# Unemployment rate
- €# Average travel to work time
- €# Level 3 skills.

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Back Office Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Blackburn with Darwen	26 / 354	Rochdale	42 / 354
Bolton	78 / 354	Rotherham	34 / 354
Bradford	64 / 354	Stockton-on-Tees	111 / 354
Dudley	142 / 354	Stoke-on-Trent ^P	22 / 354
Fife	14 / 26	Sunderland	15 / 354
Kingston upon Hull	14 / 354	Telford & Wrekin ^P	96 / 354
Kirklees	93 / 354	Wakefield	62 / 354
Leicester	35 / 354	Walsall	54 / 354
North Lanarkshire ^P	4 / 26	Wigan	57 / 354
North Tyneside	71 / 354	Wirral	70 / 354
Oldham	61 / 354	Wolverhampton	33 / 354
Peterborough ^P	133 / 354	Wrexham	13 / 22
Rhondda Cynon Taff	3 / 22		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Deprivation Index: Lower numbers indicate more deprived areas.

This scenario includes clerical, routine processing and support functions that do not require higher level skills. This scenario is similar to information support contact centres.

Key factors included asides from the core variables for this scenario were:

€# Level 2 skills and the Other Workers occupation share are included as this work type is similar to back office processing and information support contact centres. Other Workers include administration and secretarial workers and therefore best represent the broadly clerical nature of back office processes.

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- €# Average travel to work time.
- €# Manufacturing sector employment (as included for information support contact centres).

Variables given particular weight in this scenario were:

- €# Unemployment rate
- €# Average travel to work time
- €# Level 2 skills
- €# Other workers occupation share.

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Higher Value Back Office Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Birmingham ^P	43 / 354	Milton Keynes ^P	190 / 354
Bournemouth	118 / 354	Newcastle upon Tyne ^P	59 / 354
Bristol	116 / 354	Northampton	168 / 354
Cardiff ^P	16 / 22	Norwich	65 / 354
Derby ^P	104 / 354	Nottingham ^P	12 / 354
Edinburgh ^P	24 / 26	Peterborough ^P	133 / 354
Exeter	123 / 354	Plymouth	84 / 354
Fife	14 / 26	Preston	95 / 354
Glasgow ^P	1 / 26	Sheffield	92 / 354
Leeds ^P	146 / 354	Southend-on-Sea	134 / 354
Leicester	35 / 354	Stockport	204 / 354
Liverpool ^P	5 / 354	Swindon	228 / 354
Manchester ^P	7 / 354		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Deprivation Index: Lower numbers indicate more deprived areas.

This scenario requires higher level or job specific skills, likely to relate to IT, Human Resources and Finance functions.

Key factors included asides from the core variables for this scenario were:

- €# Level 3 skills. Reflecting the higher skills levels required than the Back Office scenario.
- €# Banking, finance & insurance sector employment is the most relevant broad employment group.
- €# Knowledge workers occupation share has been included as this gives an indication to the proportion of people employed as professionals/managers.

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Variables given particular weight in this scenario were:

- €# Level 3 skills
- €# Banking, finance & insurance sector employment
- €# Knowledge workers occupation share.

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Policy Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Bedford	188 / 354	Manchester ^P	7 / 354
Birmingham ^P	43 / 354	Medway	170 / 354
Bristol	116 / 354	Milton Keynes ^P	190 / 354
Cardiff ^P	16 / 22	Newcastle upon Tyne ^P	59 / 354
Colchester	218 / 354	Northampton	168 / 354
Coventry	75 / 354	Norwich	65 / 354
Derby ^P	104 / 354	Nottingham ^P	12 / 354
Glasgow ^P	1 / 26	Peterborough ^P	133 / 354
Ipswich	115 / 354	Sheffield	92 / 354
Leeds ^P	146 / 354	Southend-on-Sea	134 / 354
Leicester	35 / 354	Swindon	228 / 354
Liverpool ^P	5 / 354	Warrington ^P	181 / 354
Luton	91 / 354		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Deprivation Index: Lower numbers indicate more deprived areas.

Policy making, policy delivery, and regulatory activity were assessed under the policy scenario.

For this scenario, smaller scale relocations may be more likely to occur. When the small-scale activities ranking was run the following locations fell into or out of the first quartile:

Locations joining the first quartile

- ⊘ Ashford
- ⊘ Bournemouth
- ⊘ Cheltenham
- ⊘ Exeter

Locations falling out of the first quartile

- ⊘ Cardiff ^P
- ⊘ Glasgow ^P
- ⊘ Leeds ^P
- ⊘ Liverpool ^P

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€# Gloucester	€# Newcastle upon Tyne ^P
€# Preston	€# Sheffield
€# Telford & Wrekin ^P	€# Warrington ^P

Key factors included asides from the core variables for this scenario were:

- €# Level 4 (degree level) and above skills as these are areas of work in which a significant proportion of staff will have a first degree with some having further qualifications.
- €# Banking, finance & insurance sector employment and knowledge workers occupation share are the two work types most closely aligned with policy work and are prioritised for this scenario
- €# Travel time to central London by rail. The Policy scenario is the only one where King Sturge and the Public Sector Relocation Review team believe that travel time to London should come under consideration. Therefore, the travel time to central London by rail has been included within this ranking. However, with the improved technological infrastructure of the UK, travelling to London on a frequent basis may be less necessary for policy-makers and to represent this possibility a ranking excluding the travel to London variable is included within the additional rankings contained in the full version of our Final Report.

Variables given particular weight in this scenario were:

- €# Level 4 skills
- €# Banking, finance & insurance sector employment
- €# Knowledge workers occupation share
- €# Travel time to Central London by rail.

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Science Scenario (top quartile locations)

Location (district)	Deprivation index	Location (district)	Deprivation index
Birmingham ^P	43 / 354	Milton Keynes	190 / 354
Bradford	64 / 354	Newcastle upon Tyne ^{P S}	59 / 354
Bristol ^S	116 / 354	Northampton	168 / 354
Coventry ^S	75 / 354	Norwich	65 / 354
Derby ^P	104 / 354	Nottingham ^{P S}	12 / 354
Edinburgh ^P	24 / 26	Peterborough ^P	133 / 354
Glasgow ^P	1 / 26	Plymouth	84 / 354
Ipswich	115 / 354	Preston	95 / 354
Leeds ^{P S}	146 / 354	Salford	28 / 354
Leicester ^S	35 / 354	Sheffield ^S	92 / 354
Liverpool ^{P S}	5 / 354	Swindon	228 / 354
Manchester ^{P S}	7 / 354	Warrington ^P	181 / 354
Medway	170 / 354		

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings. ^S indicates that the location has a university with significant research funding – this data is only available for England and it should be noted that Edinburgh and Glasgow universities both have extensive research capabilities.

Deprivation Index: Lower numbers indicate more deprived areas.

This scenario attempts to model the needs of technical specialties within the public sector. A large proportion of staff will have a first degree and a significant proportion will have further qualifications. Access to an appropriate skills base is critical.

The presence of a research intensive university is likely to be an important consideration for activities under this scenario. Following guidance from the Review team using data from the Higher Education Statistics Agency, universities with a significant level of research funding are marked with a ^S in the table above.

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For this scenario, smaller scale relocations may be more likely to occur. When the small-scale activities ranking was run the following locations fell into or out of the first quartile:

Locations joining the first quartile	Locations falling out of the first quartile
☞ Bedford	☞ Birmingham ^P
☞ Colchester	☞ Bradford
☞ Derry ^P	☞ Coventry ^S
☞ Exeter	☞ Derby ^P
☞ Gloucester	☞ Leeds ^{P S}
☞ Luton	☞ Salford
☞ Southend-on-Sea	☞ Sheffield ^S
☞ Telford & Wrekin	☞ Warrington ^P

Key factors included asides from the core variables for this scenario were:

- ☞ Level 4 and above skills and the Knowledge Workers occupational share have been included as many staff are likely to have a first degree and a significant proportion will have further qualifications.
- ☞ The most relevant employment sector, albeit rather loosely, is banking, finance & insurance, and therefore this variable has been included, although it is not weighted as highly as the skills level and occupation share.

Variables given particular weight in this scenario were:

- ☞ Level 4 skills
- ☞ Knowledge workers occupational share
- ☞ Banking, finance & insurance sector employment.

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King Sturge received various documents from interested parties including local authorities and land and property owners. Some documents were sent directly to King Sturge but the Review Team channelled relevant responses to the public consultation through to King Sturge.

The location information submitted to King Sturge that referred to areas that fell within the scope of our assessment has provided useful context for our analysis but has not impacted on our methodology for ranking locations. Submissions relating to areas that have not been included in our analysis have been retained and will be made available to OGC and departments considering relocation. Many of these additional areas may be suitable destinations for the relocation of public sector activities, however the timeframe of our work and the necessary constraints of our remit have not allowed us to carry out full analysis of these additional areas. It is important to note that King Sturge and the Independent Review team have not suggested that departments' relocation planning be limited to those areas assessed by King Sturge.

1.4 CONCLUSIONS

The analysis of locations by King Sturge is intended to provide Sir Michael Lyons and public sector organisations considering relocation with an objective assessment of the relative merits of 102 areas across the United Kingdom. We are confident that areas that appear in the first quartile of our six work type scenarios will provide suitable settings for relocated activities. Many of the areas appearing in the second quartile also scored highly and will provide adequate support for relocated activity.

Successful relocation to areas in the third and fourth quartiles is significantly less likely. However, it is not for King Sturge to preclude the consideration of any of these locations by government departments.

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The specifics of each business case will vary and may differ significantly from the six generic types of activity we have considered. Public sector bodies and government departments will have access to the full analysis underpinning King Sturge's findings and will be able to adjust our models to better reflect the specific types of activity they are looking to relocate.

King Sturge's baseline reveal that there is a significant degree of variation in the areas in the top quartile for each of the different scenarios. This reflects the effect of the weightings attached to different factors in each of the work types. Further discussion of how the weightings have been adjusted can be found in the full version of the Final Report.

A number of locations appear in the top quartile of several of the different work type scenarios. This recurrent high performance is unsurprising and reflects the fact that large urban centres are more likely to contain significant amounts of the resources needed for all the work types modelled by King Sturge.

King Sturge are aware that a number of issues that fall outside the scope of this report require further consideration. These are being addressed either by Sir Michael Lyons' Independent Review Team or by Experian Business Strategies who Sir Michael has retained to provide economic analysis for his review. These additional issues include:

- €# Analysis to determine the benefits of, and scope for, the clustering together of public sector activities in a handful of locations.

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- €# Evaluating the impact that advances in Information and Communication Technologies have had on the debate about the geographical distribution of activity. This report has largely excluded rural areas because of the focus on placing the main towns/cities in the UK at the heart of the assessment. However, improved technology means rural areas can accommodate certain types of work (as demonstrated by policies employed in the Highlands and Islands of Scotland). By using technology and subject to management organisation it could be possible to locate very small clusters of employment (20 or less) in many settlements across the UK on a sustainable basis.

- €# Assessing the suitability of areas that are outside the scope of this analysis. King Sturge received various documents from interested parties including local authorities and land and property owners. Some documents were sent directly to King Sturge but the Review Team channelled relevant responses to the public consultation through to King Sturge. The documentation received has highlighted areas that are not included within the comparative assessment as they did not meet the criteria guiding our analysis. However, various areas not included in the analysis may be suitable for relocation activities. The Independent Review team has not limited departments' relocation planning to those areas assessed by King Sturge.

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Finally, King Sturge believes that relocation offers a prime opportunity for public sector organisations to re-engineer business processes and management structures. This is not an issue that we have been able to analyse within this brief. The importance of operational reform being delivered alongside relocation is being given detailed consideration by Experian Business Strategies and the Independent Review Team.

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2 DATA SOURCES AND ANALYSIS

King Sturge have collected a range of data to enable the assessment and ranking of locations against the criteria agreed by King Sturge and the Review Team and secondly to provide further information that, while not used within the ranking exercise, is valid for departments seeking gain additional insight when considering locations. This section of the report outlines the sources that have been considered by King Sturge and the relevance they have to our final analysis.

In the time available, only publicly available data sets were used. However King Sturge data on commercial property markets and the views of the King Sturge network of 16 UK offices has also fed into the overall assessment of locations (as discussed in Section 3 and Appendix K).

During the process of preparing this report King Sturge met with both Experian Business Strategies and the Office of Government Commerce to discuss how their data could benefit this exercise.

Experian Business Strategies provided data to King Sturge on employment by occupational share, which is a useful addition when considering the skills base of a location.

The Office of Government Commerce provided King Sturge with data from its ePIMS database covering existing and future surplus space within the Government estate and the presence of Government departments in each location under review. The volume of current and future surplus space in each location was used as a core variable. The list of departments present in each location is included in the master spreadsheet of data submitted to the Review team.

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The main data sources feeding into the ranking and scoring of locations were the 2001 Census, the 2001 Labour Force Survey (accessed via NOMIS), the 2001 Annual Business Inquiry (accessed via NOMIS), Experian Business Strategies' data on occupation share and drive-time based catchment populations, the ePIMS database managed by the Office for Government Commerce and additional property market data from King Sturge. While data published by the Government are official data in the public domain many data sets are continually revised. It should be noted that King Sturge cannot account for any such changes beyond the dates stated in this document.

The full set of data types used by King Sturge are listed below. Further detail about the sources of the information and how they have been used can be found in Appendix K:

Employment-based: labour market capacity and skills levels

The data listed below all contribute to the assessment of labour market conditions and skill levels.

- €# District population
- €# Population growth
- €# Percentage of working age population
- €# Percentage of working age population, economically active
- €# Unemployment rate
- €# Educational attainment
- €# Average gross weekly earnings.
- €# Total employment
- €# Employment by sector
- €# Occupation share
- €# Average travel to work time
- €# Catchment population.

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Accommodation-based and existing Government activity

The data listed below all contribute to the assessment of property markets and their future capacity. Additional data were sourced directly from the King Sturge network of 16 UK offices and are outlined later in this section and in Appendix K.

- €# Amount of Built office stock (ft²).
- €# Surplus supply within the Government estate
- €# Presence of Existing Government departments

Transport links with central London

This travel time to central London by rail was used as core variable while the remaining variables were provided to the Review team as background information:

- €# Travel time to central London by rail
- €# Travel time to central London by road
- €# Nearest airport

Telecoms infrastructure

This data is important to develop an understanding of the connectivity of locations.

- €# Cable provider.

Quality of life factors

These data sets were used to develop a broad understanding of the quality of life in each location:

- €# House prices
- €# School league tables

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King Sturge Data

Information on commercial property costs, and the availability of office accommodation, was sourced from the King Sturge regional office network to provide market judgements of the following:

- €# Prime office rents
- €# Secondary office rents
- €# Available Grade A space

Through the King Sturge network of regional offices, a short survey of the locations under review was also undertaken to allow considered judgemental comments to be made on the ability of locations to accommodate increased Government activity. The survey allowed judgements to be made on the following:

- €# Supply of Grade A space
- €# Supply of Grade B/C space
- €# Office Development pipeline
- €# Ability to accommodate increased Government activity

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3 DETAILED ANALYSIS OF LOCATIONS

A number of variables listed under the data sources in Section 2 are relevant to all of the relocation scenarios. These variables form the core that were used in all the scoring and rankings. In addition, other variables were included in each relocation scenario to ensure that the most appropriate labour market was captured. The additional scenario specific variables largely relate to skills levels, employment by sector and average travel to work time.

For each relocation scenario, the variables were scored by their ranked position (with the location ranked 1 scoring 1 and perceived to be the best under that variable). Table 3.1 lists the core variables and additional variables that have been considered alongside the ranking criteria.

Table 3.1: Variables included in Scoring & Ranking and Ranking Criteria

Variables	Ranking Criteria (1 = best & scores 1)
CORE VARIABLES	
District population	Largest population ranked 1
Population growth, 2000-2010	Greatest growth ranked 1
Working age population	Highest proportion ranked 1
Unemployment rate	Highest rate ranked 1
Average weekly earnings	Lowest ranked 1
Total employment	Largest total ranked 1
Catchment population (30-minutes)	Largest population ranked 1
Built office stock	Largest stock ranked 1
Prime office rents (in town)	Lowest ranked 1
Prime office rents (out of town)	Lowest ranked 1
Current surplus in the Government estate	Highest surplus ranked 1
Future surplus in the Government estate	Highest surplus ranked 1
ADDITIONAL VARIABLES	
Skills levels (Level 2, 3 or 4)	Where applicable, highest proportion ranked 1

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Variables	Ranking Criteria (1 = best & scores 1)
Employment by sector	Where applicable, highest proportion ranked 1
Employment by occupation share	Where applicable, highest proportion ranked 1
Average travel to work time	Where applicable, shortest travel time ranked 1
Travel time to central London by rail	Where applicable, shortest travel time ranked 1

The ranked position for each location (under each relocation scenario) is based on the average weighted score and is determined as follows:

Table 3.2: Process of determining ranked position of each location

Ø	Apply score to the ranked position of each variable (see Table 3.1 above)
Ø	Weight the scoring of each variable to reflect importance within the scenario (the weightings under each scenario are listed in sections 3.3 to 3.8)
Ø	The total score for each location is the sum of all weighted scores
Ø	Divide total weighted score by the sum of the weightings to get the average weighted score
Ø	Rank the locations by the average weighted score (the lower the score the more suited the location to the scenario under consideration)

Each variable included in the rankings has been weighted as 1.0, asides from those that are assumed to be more important in determining the best location for each activity. The additional weightings are explained in Sections 3.3 to 3.8 by relocation scenario.

The weightings for two variables have been consistently reduced across all scenarios to 0.5 to eliminate double-counting. This is a technical factor rather than a scenario specific factor.

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The variable relating to property costs (prime office rents) is split into the in town and out of town office markets and is therefore scored twice in the scoring and ranking exercise. In order to re-balance the weighting of this variable, the two scores for in town and out of town rents have effectively been halved (by applying a weighting of 0.5) to avoid double-counting this factor.

The same weighting of 0.5 has been applied to the data from ePIMS on surplus space within the Government estate. As with prime office rents, this data is split into two fields, one for current surplus and one for known future surplus. Again the scores have effectively been halved (by applying a weighting of 0.5) to re-balance the variable and avoid double-counting.

For each relocation scenario discussed below, the initial weighted ‘base-case’ ranking has been provided as well as additional rankings showing the sensitivity of issues such as travel time to London and the size (smaller scale or larger scale) of relocation as relevant to each relocation scenario.

3.1 ADDITIONAL RANKINGS

In order to take account of the varying scales of relocation activities, re-weighting the population size-based variables has allowed additional rankings to be carried out.

For a relocation scenario where the activity would be relatively small or dispersed across a number of locations, variables relating to the size of the population have been stripped out (weighted at 0.0). Conversely, for a larger scale relocation scenario the weighting of the population size-based variables has been increased. See Table 3.3.

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Table 3.3: Variables Re-weighted for Additional Rankings

Variable	Weighting for small-scale activity	Weighting for large-scale activity
District population	0.0	1.5
Catchment population (30-mins)	0.0	1.5
Total employment	0.0	2.5

The same additional rankings and re-weightings have been carried out for all six relocation scenarios. The locations that fall in or out of the top quartile are listed under each scenario in sections 3.3 to 3.8.

All other weightings used under the base-case in each scenario remain unchanged for the additional rankings.

3.2 PROPERTY MARKET CAPACITY SCORING AND RANKING

For each location under review, King Sturge undertook a short qualitative survey to make judgement on the ability of each location to meet increased occupier demand. The property-related issues covered are discussed in more detail in Section 2 and Appendix K but broadly provide a view on the level of available office space in each location, the ability of the development pipeline to accommodate future demand and the overall ability of the location to accommodate increased Government activity.

For each of the questions in the survey, the relevant King Sturge office was offered a choice of five answers. This allowed the scoring of each location from 1-5 based on its suitability under each factor.

The scores were then weighted according to the perceived importance of each factor in the overall ability of the location to accommodate increased occupier (Government) activity. The weightings applied are shown in Table 3.4.

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Table 3.4: Property Market Capacity Weightings

Variable	Weighting
Ability to accommodate increased Government activity	2.0
Available Grade A space	1.5
Development pipeline	1.5
Available Grade B/C space	1.0

For each relocation scenario, those locations within the top quartile that also fall within the top quartile of the property market capacity rankings are identified (with a ^P) in the tables in Sections 3.3 to 3.8. Of those locations within the top quartile, these are the locations that are likely to be best placed in the short term to accommodate increased activity within their office markets. This is on the basis that they have scored most highly in terms of available office space and the capacity of the development pipeline to accommodate future demand.

3.3 INFORMATION SUPPORT CONTACT CENTRES

For the information support contact centre scenario, the following additional variables were included in the scoring and ranking:

- €# Level 2 skills
- €# Average travel to work time
- €# Manufacturing sector employment
- €# People workers occupation share.

The Level 2 skills variable was selected as the best match to the skills-level required for this scenario.

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The average travel to work time is very important to Contact centre workers who are often on lower wages and rely on the place of work being within walking distance or accessible by public transport. Fewer Contact centre employees will drive to work. Therefore the data from the Labour Force Survey on average travel to work time were included. In a separate study by King Sturge entitled *Office Buildings: the Human Impact* (2003) it was found that the travel to work time for Contact centre managers was only 60% of the average travel to work time of managers in Central Business Districts.

Contact centres are often located in areas with high unemployment rates and an available workforce to tap into. Such locations are often areas of manufacturing decline and therefore the proportion of people employed within the manufacturing sector was included under this scenario.

In addition, data supplied to King Sturge by Experian Business Strategies on the occupation share of employees have also been included under this scenario. In relation to Contact centres, the proportion of People Workers in each location has been included. People Workers include those involved in personal service occupations, sales and customer services.

Base Case Scenario

The following standard weightings were applied to the information support Contact centre scenario:

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Table 3.5: Information Support Contact Centre Scenario Weightings

Variable	Weighting
Unemployment rate	2.0
Average travel to work time	2.0
Level 2 Skills	2.0
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

The weightings for the level of unemployment, average travel to work time and Level 2 skills were all doubled to 2.0 to allow for the importance of these factors when choosing a location for Contact centre employment to be accounted for.

The average weighted score has been used to rank the 102 locations under review. The top 25 locations are listed in alphabetical order in Table 3.6. The full rankings, in alphabetical order by quartile, are provided in Appendix A.

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Table 3.6: Information Support Contact Centre Scenario – Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Blackburn with Darwen	Peterborough ^P
Bolton	Rhondda Cynon Taff
Bradford	Rochdale
Derry ^P	Rotherham
Dudley	Stockton-on-Tees
Fife	Stoke-on-Trent ^P
Kingston upon Hull	Sunderland
Kirklees	Swansea ^P
Leicester	Telford & Wrekin ^P
Liverpool ^P	Walsall
North Lanarkshire ^P	Wigan
North Tyneside	Wirral
Oldham	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.7.

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Table 3.7: Information Support Contact Centres – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Blackpool	Bradford
Carlisle	Liverpool ^P
Carrick	North Lanarkshire ^P
Falkirk	Oldham
Knowsley	Rochdale
Torbay	Rotherham
Waveney	Stoke-on-Trent ^P
Wrexham	Walsall
LARGE-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Coventry	Derry ^P
Leeds ^P	Peterborough ^P
Stockport	Stoke-on-Trent ^P
Wakefield	Telford & Wrekin ^P

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

The full rankings, in alphabetical order by quartile, for the small-scale and large-scale activities are included in Appendix A.

3.4 INTERACTIVE CONTACT CENTRES

For the interactive contact centre scenario, the following additional variables were included in the scoring and ranking:

- €# Level 3 skills
- €# Average travel to work time
- €# Public sector employment
- €# People workers occupation share.

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The Level 3 Skills variable has been used as the best match for the skills-level required for this scenario. Average travel to work time remains very important for interactive contact centre operations so this variable is again included.

The proportion of people currently employed within the public sector has been included under this scenario as skills may be transferable that are suitable for skilled public sector contact centre activity.

As with the information support contact centre scenario, the People Workers occupation share has been included as a relevant variable representing the proportion of people currently employed in contact centre type activities such as personal and customer services and sales.

Base Case Scenario

The following standard weightings were applied to the interactive contact centre scenario:

Table 3.8: Interactive Contact Centre Scenario Weightings

Variable	Weighting
Unemployment rate	2.0
Average travel to work time	2.0
Level 3 Skills	2.0
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

The weightings for the level of unemployment, average travel to work time and Level 3 skills were all doubled to 2.0 to allow for the importance of these factors when choosing a location for contact centre employment to be accounted for.

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The average weighted score has been used to rank the 102 locations under review. The top 25 locations are listed in alphabetical order in Table 3.9. The full rankings, in alphabetical order by quartile, are provided in Appendix B.

Table 3.9: Interactive Contact Centre Scenario – Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Belfast ^P	Middlesbrough
Blackpool	Newcastle upon Tyne ^P
Bolton	North Lanarkshire ^P
Bradford	North Tyneside
Cardiff ^P	Nottingham ^P
Doncaster	Preston
Exeter	Sheffield
Fife	Stockton-on-Tees
Kingston upon Hull	Sunderland
Kirklees	Swansea ^P
Leicester	Wigan
Liverpool ^P	Wirral
Manchester ^P	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.10.

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Table 3.10: Interactive Contact Centre Scenario – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Carrick	Bolton
Derry ^P	Bradford
Falkirk	Cardiff ^P
Lancaster	Doncaster
Norwich	Kirklees
Plymouth	Manchester ^P
Rhondda Cynon Taff	North Lanarkshire ^P
Scarborough	Sheffield
Torbay	Wigan
LARGE-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Dudley	Blackpool
Glasgow ^P	Exeter
Leeds ^P	Middlesbrough
Rochdale	Stockton-on-Tees

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

The full rankings, in alphabetical order by quartile, for the small-scale and large-scale activities are included in Appendix B.

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3.5 BACK OFFICE PROCESSES

For the back office processes scenario, the following additional variables were included in the scoring and ranking:

- €# Level 2 skills
- €# Average travel to work time
- €# Manufacturing sector employment
- €# Other workers occupation share.

The skills level required for back office processes is similar to that of information support Contact centres. In this respect, the Level 2 skills variable was selected as the best match to the skills level required for this scenario.

Also reflecting the similarities between back office processes and information support Contact centres, the average travel to work time and proportion of people employed in the manufacturing sector have also been included under this scenario.

In addition, the proportion of Other Workers in each location has been included. Other Workers include administration and secretarial workers and therefore best represent the broadly clerical nature of back office processes.

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Base Case Scenario

The following standard weightings were applied to the back office processes scenario:

Table 3.11: Back Office Scenario Weightings

Variable	Weighting
Unemployment rate	2.0
Average travel to work time	2.0
Level 2 Skills	2.0
Other workers	2.0
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

The weightings for the level of unemployment, average travel to work time, Level 2 skills and Other workers were all doubled to 2.0 to allow for the importance of these factors when choosing a location for back office processes to be accounted for.

The average weighted score has been used to rank the 102 locations under review. The top 25 locations are listed in alphabetical order in Table 3.12. The full rankings, in alphabetical order by quartile, are provided in Appendix C.

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Table 3.12: Back Office Scenario – Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Blackburn with Darwen	Rochdale
Bolton	Rotherham
Bradford	Stockton-on-Tees
Dudley	Stoke-on-Trent ^P
Fife	Sunderland
Kingston upon Hull	Telford & Wrekin ^P
Kirklees	Wakefield
Leicester	Walsall
North Lanarkshire ^P	Wigan
North Tyneside	Wirral
Oldham	Wolverhampton
Peterborough ^P	Wrexham
Rhondda Cynon Taff	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.13.

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Table 3.13: Back Office Processes – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Carlisle	Bolton
Derry ^P	Bradford
Falkirk	Oldham
Gateshead ^P	Rochdale
Neath Port Talbot	Wakefield
Newcastle-under-Lyme	Wirral
Waveney	Wolverhampton
LARGE-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Coventry	Peterborough ^P
Leeds ^P	Wrexham

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

The full rankings, in alphabetical order by quartile, for the small-scale and large-scale activities are included in Appendix C.

3.6 HIGHER VALUE BACK OFFICE FUNCTIONS

For the higher value back office scenario, the following additional variables were included in the scoring and ranking:

- €# Level 3 skills
- €# Banking, finance & insurance sector employment
- €# Knowledge workers occupation share.

For this scenario it is important to have a relatively skilled workforce, although it is not necessary for a high proportion to be educated to degree level and beyond. Therefore the Level 3 skills variable has been included.

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The most relevant employment sector from the broad industrial groups used in the Annual Business Inquiry is the Banking, Finance & Insurance sector and the proportion employed within this sector has been included under this scenario.

In terms of occupation share, the proportion of Knowledge Workers has been included as this gives an indication as to the strength of the location in terms of those employed as managers and professionals (in addition to technical occupations).

Base Case Scenario

The following standard weightings were applied to the higher value back office scenario:

Table 3.14: Higher Value Back Office Scenario Weightings

Variable	Weighting
Level 3 Skills	2.0
Banking, finance & insurance employment	2.0
Knowledge workers	1.5
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

The weightings for Level 3 skills and employment within the banking, finance & insurance sector were doubled to 2.0 to reflect the particular importance of these factors in scoring locations under the Higher Value Back Office scenario. In addition, the weighting for Knowledge Workers was raised to 1.5 to reflect that, although not considered as important as the other two variables, it is still considered to be more important than the standard weighted variables.

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The average weighted score has been used to rank the 102 locations under review. The top 25 locations under the Higher Value Back Office scenario are listed in alphabetical order in Table 3.15. The full rankings, in alphabetical order by quartile, are provided in Appendix D.

Table 3.15: Higher Value Back Office Scenario – Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Birmingham ^P	Milton Keynes ^P
Bournemouth	Newcastle upon Tyne ^P
Bristol	Northampton
Cardiff ^P	Norwich
Derby ^P	Nottingham ^P
Edinburgh ^P	Peterborough ^P
Exeter	Plymouth
Fife	Preston
Glasgow ^P	Sheffield
Leeds ^P	Southend-on-Sea
Leicester	Stockport
Liverpool ^P	Swindon
Manchester ^P	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.16.

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Table 3.16: Higher Value Back Office Scenario – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Aberdeen ^P	Birmingham ^P
Bedford	Glasgow ^P
Cheltenham	Liverpool ^P
Luton	Sheffield
Warwick	Stockport
LARGE-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Bradford	Bournemouth
Dudley	Exeter
Salford	Fife
Trafford	Peterborough ^P
Warrington ^P	Plymouth
Wirral	Southend-on-Sea

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

The full rankings, in alphabetical order by quartile, for the small-scale and large-scale activities are included in Appendix D.

3.7 POLICY FUNCTIONS

For the Policy functions scenario, the following additional variables were included in the scoring and ranking:

- €# Level 4 and above skills
- €# Banking, finance & insurance sector employment
- €# Knowledge workers occupation share
- €# Travel time to central London by rail.

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For Policy functions the Review Team has specified that a significant proportion of staff will have a first degree or further qualifications, in this context the Level 4 and above skills variable has been included.

As with the Back Office scenarios, the most relevant employment sector is banking, finance & insurance and the most relevant occupation share is Knowledge Workers, hence both of these variables have been included.

The Policy scenario is the only one where King Sturge and the Public Sector Relocation Review team believe that travel time to London should come under consideration. Therefore, the travel time to central London by rail has been included within this ranking. However, as discussed with the Review Team, with the improved technological infrastructure of the UK, travelling to London on a frequent basis may be less necessary for policy-makers and to represent this issue a ranking excluding the travel to London variable is included within the additional rankings.

Base Case Scenario

The following standard weightings were applied to the Policy scenario:

Table 3.17: Policy Scenario Weightings

Variable	Weighting
Level 4 Skills	2.0
Banking, finance & insurance employment	1.5
Knowledge workers	2.0
Travel time by rail to central London	2.5
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

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The most important variable under the base-case scenario for Policy functions was travel time to central London by rail, hence the weighting of 2.5, followed by Level 4 skills and Knowledge Workers that were both weighted at 2.0.

The average weighted score has been used to rank the 102 locations under review. The top 25 locations are listed in alphabetical order in Table 3.18. The full rankings under the Policy scenario are provided, in alphabetical order by quartile, in Appendix E.

Table 3.18: Policy Scenario – Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Bedford	Manchester ^P
Birmingham ^P	Medway
Bristol	Milton Keynes ^P
Cardiff ^P	Newcastle upon Tyne ^P
Colchester	Northampton
Coventry	Norwich
Derby ^P	Nottingham ^P
Glasgow ^P	Peterborough ^P
Ipswich	Sheffield
Leeds ^P	Southend-on-Sea
Leicester	Swindon
Liverpool ^P	Warrington ^P
Luton	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.19.

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In addition, King Sturge carried out a further re-weighting under the Policy scenario that eliminates the travel time to central London by rail variable by re-weighting it to 0.0 (as shown in Table 3.19).

There is an argument that the technological infrastructure of the UK means that it is now less necessary for policy-makers to travel to London on a frequent basis as communications channels such as email and video-conferencing place less importance on face-to-face contact.

Table 3.19: Policy Scenario – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Ashford	Cardiff ^P
Bournemouth	Glasgow ^P
Cheltenham	Leeds ^P
Exeter	Liverpool ^P
Gloucester	Newcastle upon Tyne ^P
Preston	Sheffield
Telford & Wrekin ^P	Warrington ^P
LARGE-SCALE RELOCATION ACTIVITIES	
Locations joining the top 25	Locations falling out of the top 25
Bradford	Bedford
Dudley	Colchester
Kirklees	Ipswich
TRAVEL TIME TO CENTRAL LONDON EXCLUDED	
Locations joining the top 25	Locations falling out of the top 25
Bradford	Bedford
Edinburgh ^P	Cardiff ^P
Plymouth	Colchester
Preston	Luton
Salford	Southend-on-Sea

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings

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3.8 SCIENCE FUNCTIONS

For the science, medical or other technical speciality relocation scenario ('Science scenario') the following additional variables were included in the scoring and ranking:

- €# Level 4 and above Skills
- €# Banking, finance & insurance sector employment
- €# Knowledge workers occupation share

For Science functions the Review Team has specified that many staff are likely to have a first degree and a significant proportion will have further qualifications, in this context the Level 4 and above skills variable has been included.

The most relevant employment sector, albeit rather loosely, is banking, finance & insurance, and therefore this variable has been included, although it is not weighted as highly as the skills level and occupation share.

The Review Team specifies that under the Science scenario a large proportion of staff will have specific technical skills; the Knowledge Workers occupational share covers this and has therefore been included.

Base Case Scenario

The following standard weightings were applied to the Science scenario:

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Table 3.20: Science Scenario Weightings

Variable	Weighting
Level 4 Skills	2.5
Banking, finance & insurance employment	1.5
Knowledge workers	2.0
Prime office rents, in town	0.5
Prime office rents, out of town	0.5
Government surplus space, current	0.5
Government surplus space, future	0.5
All other variables	1.0

It was felt, from the variables under consideration, that the most important variable under the Science Scenario was Level 4 skills and this has been weighted as 2.5. In addition, the Knowledge Workers variable has been weighted as 2.0 and the banking, finance & insurance sector employment has been weighted at 1.5.

The average weighted score has been used to rank all 102 locations under review. The top 25 locations are listed in alphabetical order in Table 3.21. The full rankings under the Science scenario, in alphabetical order by quartile, are presented in Appendix F.

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Table 3.21: Science Scenario – Base Case Rankings, Top 25 Locations in Alphabetical Order

Location (district)	Location (district)
Birmingham ^P	Milton Keynes
Bradford	Newcastle upon Tyne ^P
Bristol ^S	Northampton
Coventry ^S	Norwich
Derby ^P	Nottingham ^{P S}
Edinburgh ^P	Peterborough ^P
Glasgow ^P	Plymouth
Ipswich	Preston
Leeds ^{P S}	Salford
Leicester ^S	Sheffield
Liverpool ^{P S}	Swindon
Manchester ^{P S}	Warrington ^P
Medway	

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings.

^S indicates that the location has a university with significant research funding – this data is only available for England and it should be noted that Edinburgh and Glasgow universities both have extensive research capabilities.

In addition, the presence of a research-intensive university is likely to be an important consideration for science-based public sector activities considering relocation opportunities as such locations should be able to spawn and/or support a broader scientific cluster.

The location of such universities has been assessed, with guidance from the Review team, by the level of research funding (research intensity). Data collated by the Higher Education Statistics Agency (HESA) on the income of institutions from research grants, contracts etc has been used. The most recent data made available is for the 2000/01 academic year.

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Any location in the top quartile under the Science scenario, which has a significant level of research funding (taken to be over £11.5m), is marked with an ^S in Table 3.21. It should be noted that this data is only available for universities within England and that Edinburgh and Glasgow Universities both have extensive research capabilities.

The universities with a significant level of research funding (research intensity) are listed in Appendix G. Universities that do not fall within the top quartile of locations under the Science scenario, but can be considered as offering the potential to support a broader scientific cluster, are as follows:

- £# University of Durham
- £# University of York

Additional rankings

When the weightings of the population size-based variables are adjusted to reflect small-scale or large-scale relocation activities, the locations that fall in or out of the top quartile are listed in Table 3.22.

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Table 3.22: Science Scenario – Change in the Top 25

SMALL-SCALE RELOCATION ACTIVITIES	
Locations joining the Top 25	Locations falling out of the Top 25
Bedford ^S	Birmingham ^P
Colchester ^S	Bradford
Derry ^P	Coventry ^S
Exeter ^S	Derby ^P
Gloucester	Leeds ^{PS}
Luton	Salford
Southend-on-Sea	Sheffield ^S
Telford & Wrekin	Warrington ^P
LARGER-SCALE RELOCATION ACTIVITIES	
Locations joining the Top 25	Locations falling out of the Top 25
Bolton	Ipswich
Dudley	Medway
Kirklees	Peterborough ^P
Trafford	Swindon

Note: ^P denotes locations that fall within the top quartile under the property market capacity rankings. ^S indicates that the location has a university with significant research funding – this data is only available for England.

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4 OTHER FACTORS RELEVANT TO RELOCATION STRATEGY

This section provides an overview of some of the additional factors that may influence relocation activity besides from those variables considered in the scoring and ranking exercise carried out for the six relocation scenarios in Section 3. These can broadly be broken into property market capacity factors, the regional economic impact and quality of life factors.

4.1 PROPERTY MARKET CAPACITY FACTORS

While a location may have the required skill base and available workforce, the local office market may not be suitable for increased occupier activity due to factors such as poor stock and a constrained development pipeline. To take account of such factors, King Sturge undertook a short qualitative survey of the office markets in each location under review to make a judgement on the overall ability of each location to accommodate increased occupier activity. This has been discussed in more detail in Section 3.2 and Appendix K.

If a location appears suitable for a particular relocation scenario but no suitable commercial property is readily available, considerable abortive work could be involved.

The judgements on each location were ranked and scored to give an overall average score for each location based on its ability to meet future property need. See Section 3.2 for further details.

For the Top 25 locations ranked under each relocation scenario, those locations that also fall within the top quartile of the property market capacity rankings have been identified.

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4.2 REGIONAL ECONOMIC IMPACT AND QUALITY OF LIFE FACTORS

Variables relating to the regional economic impact and quality of life were not included in the base-case scoring and ranking of locations, largely as data are not comparable across countries within the UK and in addition, following discussions with the Review Team, these factors are unlikely to influence the key relocation decisions in the initial stages.

However, data on the level of deprivation in each location should come under consideration. In Section 4.5, the level of deprivation in each of the Top 25 locations under each relocation scenario is commented on by making reference to the Indices of Deprivation for the relevant UK country at district level.

Data on average house prices, secondary school performance and average travel to work time are also discussed in Section 4.3.

Financial support is available at various levels across the UK. In certain instances such support will be available to public sector relocations. In Section 4.5 the availability of grant support through the two key sources for funding capital and revenue projects (The Single Programme and European Regional Development Fund) are discussed for the locations under review. The coverage of the four remaining operational Enterprise Zones is also discussed in this section.

4.3 QUALITY OF LIFE FACTORS

House prices, school league tables and average travel to work times are important considerations for relocation, especially if the relocation involves moving an employee with a family and children in local schools.

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Tables 4.1 to 4.3 list the locations from the top quartile under each of the six relocation scenarios with the highest and lowest average house prices, best and worst secondary school performance and shortest and longest average travel to work times.

These tables provide only an indication, as comparable data are not always available for each UK country within the assessment of locations. For example, data on average house prices from HM Land Registry are not available for Scotland and Northern Ireland and the Department for Education & Skills only publish the secondary school performance tables for schools in England. However, the tables do provide a feel as to the variation in quality of life factors between those locations within the top quartile.

Table 4.1 demonstrates the wide range of **average house prices** [across the locations under review (Appendix I provides the full list of average house prices for the 102 locations under review)]. The table shows the highest and lowest average house prices within the top quartile locations under each relocation scenario. The lowest average house price for a top quartile location at Q2-2003 was in Kingston upon Hull (£54,634) while the highest was in Bournemouth (£171,329). Considering average house prices over the same period in Greater London and the South East were £246,709 and £94,923 respectively, considerable savings can be made by employees relocated to the regions.

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Table 4.1: Highest and Lowest House Prices for Top Quartile Locations

Scenario	Highest		Lowest	
	Location	Average price (£)	Location	Average price (£)
Information support contact centre	Peterborough	112,654	Kingston upon Hull	54,634
Interactive contact centre	Exeter	151,771	Kingston upon Hull	54,634
Back office	Peterborough	112,654	Kingston upon Hull	54,634
Higher value back office	Bournemouth	171,329	Liverpool	74,202
Policy	Milton Keynes	164,433	Liverpool	74,202
Science	Milton Keynes	164,433	Liverpool	74,202

Source: HM Land Registry, Q2-2003, King Sturge

Notes: comparable data are not available for Scotland and Northern Ireland. Highest and lowest prices refer only to base-case top quartile locations.

Table 4.2 presents the best and worst top quartile locations under each relocation scenario for **secondary school performance** (in England only). The standard measure of the performance of secondary schools by Local Education Authority (LEA) is the proportion of pupils that achieve 5+ Grade A*-C GCSEs. The LEA average only includes the performance of state schools (including special schools) so excludes private schools. Therefore Bristol's average of 31.0%, compared to the England average of 51.6%, reflects the performance of state schools and not private schools within the same area.

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Table 4.2: Best and Worst School Performance for Top Quartile Locations

Scenario	Best		Worst	
	Location	LEA average (%)	Location	LEA average (%)
Information support contact centre	Wirral	53.1	Kingston upon Hull	28.9
Interactive contact centre	Wirral	53.1	Kingston upon Hull	28.9
Back office	Wirral	53.1	Kingston upon Hull	28.9
Higher value back office	Southend-on-Sea	56.0	Bristol	31.0
Policy	Ipswich	56.5	Bristol	31.0
Science	Ipswich	56.5	Bristol	31.0

Source: Department for Education & Skills, King Sturge

Notes: Performance tables are only available for schools in England. The LEA average is based on the 2002 performance of secondary schools (the proportion of pupils that achieved 5+ Grade A*-C GCSEs). The England average is 51.6%. The best and worst performance refers only to base-case top quartile locations.

Table 4.3 summarises the shortest and longest **average travel to work times** for top quartile locations under each relocation scenario. The average travel to work time by employees can be significantly reduced by relocation. According to data from the Labour Force Survey (autumn 2002), the average travel to work time for people working in the City of London is 59 minutes. In contrast, the average travel to work times shown in Table 4.3 are considerably shorter, with the longest travel time being 34 minutes in Manchester.

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Table4.3: Shortest and Longest Average Travel to Work Times for Top Quartile Locations

Scenario	Shortest		Longest	
	Location	Minutes	Location	Minutes
Information support contact centre	Peterborough	11	Liverpool	26
Interactive contact centre	Fife	17	Manchester	34
Back office	Peterborough	11	Wolverhampton	25
Higher value back office	Peterborough	11	Manchester	34
Policy	Peterborough	11	Manchester	34
Science	Peterborough	11	Manchester	34

Source: Labour Force Survey (autumn 2002)

Notes: average travel to work time by place of work. Shortest and longest times refer only to base-case top quartile locations.

Relocating outside of London and the South East may provide public sector workers with the opportunity to benefit from significantly lower house prices and shorter commute times.

4.4 TIMESCALE OF RELOCATION ACTIVITY

Forecast population growth at the district level is a good indicator as to the ability of a location to accommodate relocation activities over different timescales.

For this comparative assessment the latest official sub-national population projections from the ONS were used for England. These are 2000-based and do not take account of the 2001 Census and are therefore used with the caveat that there are likely to be inaccuracies. However, these remain the latest official projections at district level. For Scotland, Wales and Northern Ireland the equivalent latest population projections were used but, as with England, none of these take account of the 2001 Census.

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It is still relevant to highlight those locations that are expected to see a decline in population over the next five and 10 years and those that are projected to see the strongest rates of growth.

Table 4.4 and 4.5 show the Top 10 and Bottom 10 locations in the UK for population growth over the periods 2000-2006 and 2000-2010. The occurrence of these locations within the top quartile of the six relocation scenarios is also noted.

Table 4.4: Top 10 and Bottom 10 Locations for Projected Growth in Population, 2000-2006

Top 10 Locations			Bottom 10 Locations		
District	% growth	Top Quartile scenarios*	District	% growth	Top Quartile scenarios*
Milton Keynes	+8.7	HV, P, S	Dundee	-7.0	..
Poole	+5.8	..	Aberdeen	-3.9	..
Telford & Wrekin	+5.5	CIS, BO	Belfast	-3.7	CIN
Worcester	+4.8	..	Liverpool	-3.6	CIS, CIN, HV, P, S
Swindon	+4.8	HV, P, S	Middlesbrough	-3.4	CIN
Preston	+4.7	CIN, F, S	Knowsley	-3.3	..
Warwick	+4.6	..	Nuneaton & Bedworth	-2.8	..
Bournemouth	+4.5	HV	Wirral	-2.7	CIS, CIN, BO
Derry	+4.5	CIS	Sunderland	-2.4	CIS, CIN, BO
West Lothian	+4.5	..	Salford	-2.3	S

Source: ONS sub-national population projections

* CIS = Contact Centre Information Support; CIN = Contact Centre Interactive; BO = Back Office processes; HV = Higher Value Back Office functions; P = Policy functions; S = Science functions

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Table 4.5: Top 10 and Bottom 10 Locations for Projected Growth in Population, 2000-2010

Top 10 Locations			Bottom 10 Locations		
District	% growth	Top Quartile scenarios*	District	% growth	Top Quartile scenarios*
Milton Keynes	+14.3	HV, P, S	Dundee	-11.8	..
Poole	+9.5	..	Aberdeen	-6.7	..
Telford & Wrekin	+8.6	CIS, BO	Knowsley	-5.6	..
Bournemouth	+8.1	HV	Belfast	-5.0	CIN
Warwick	+7.9	..	Middlesbrough	-5.0	CIN
Swindon	+7.8	HV, P, S	Nuneaton & Bedworth	-4.5	..
Preston	+7.8	CIN, S	Wirral	-4.2	CIS, CIN, BO
Colchester	+7.7	..	Sunderland	-3.7	CIS, CIN, BO
West Lothian	+7.4	..	Salford	-3.1	S
Derry	+7.4	CIS	Gateshead	-2.9	..

Source: ONS sub-national population projections

* CIS = Contact Centre Information Support; CIN = Contact Centre Interactive; BO = Back Office processes; HV = Higher Value Back Office functions; P = Policy functions; S = Science functions

In addition, the Government has highlighted a number of growth areas (Sustainable Communities) where housing development will be focussed in the future. These locations (Ashford, Thames Gateway and Milton Keynes) will be the focus of accelerated population growth not accounted for in the official population projections. Other locations such as Peterborough also have significant housing expansion plans.

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Discussions with Experian Business Strategies over the course of the project have raised the issue that it may be pertinent to carry out further work on the timescale (in terms of whether relocations will take place over the next three, five, 10 years etc) of planned relocation activities, using district-level model-based forecasts that Experian Business Strategies have produced on population and employment growth.

4.5 THE REGIONAL ECONOMIC IMPACT

The relocation of central Government activities has the potential to contribute to the regional economic balance. Bringing jobs and increased economic activity to those parts of the UK that suffer from high levels of deprivation is likely to have a greater beneficial effect (both socially and economically) than if those jobs were transplanted to overheating areas.

In addition, various areas within the UK qualify for financial support at the regional and European level, through the provision of funding for capital and revenue projects, benefits available through Enterprise Zones, Stamp Duty Exemption etc.

Deprivation

The **level of deprivation** in each location under review provides an indication as to which locations may benefit more from the investment in the local area that would be associated with Government relocation.

The Indices of Deprivation are available at district level by UK country; there is not an aggregate index covering districts on a UK-wide basis. The ranking of each location under review by average ward scores, which is generally quoted as the multiple index of deprivation, has been forwarded to the Review Team within the master spreadsheet. In addition, Appendix H includes the Indices of Deprivation ranking for each top quartile location under the six relocation scenarios.

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The Indices of Deprivation at each UK country level rank 1 as the most deprived district. However, the data across the four countries are not directly comparable as the number of districts within each ranking varies greatly. The England Indices of Deprivation rank 354 districts, Wales ranks 22 districts, Scotland ranks 32 districts and Northern Ireland ranks 26 districts.

The most deprived district in England to appear in the top quartile rankings is Liverpool (ranked 5 out of 354 districts). Liverpool appears within the top quartile for the following relocation scenarios: Information Support Contact Centre, Interactive Contact Centre, Higher Value Back Office, Policy and Science.

The most deprived district in Wales to appear in the top quartile rankings is Rhondda Cynon Taff, which is ranked 3 out of 22 districts and appears within the Information Support Contact Centre and Back Office scenarios.

For Scotland, the most deprived district within the top quartile rankings is Glasgow, which is ranked 1 out of 32 districts. Glasgow features in the top quartile for the Higher Value Back Office, Policy and Science scenarios.

Belfast is the most deprived district in Northern Ireland (ranked 2 out of 26 districts) within the top quartile rankings and appears under the Interactive Contact Centre scenario.

Financial Support

On a nationwide basis there are two key sources of funding for capital and revenue projects carried out by the public or private sector that are most relevant to the relocation of public sector activities. The funding sources are: The Single Programme and the European Regional Development Fund (ERDF), which are both discretionary funding sources, award of which may depend on the availability of funds and competition for funds. Appendix J lists the status of each location (district) under review with regards to qualification for funding.

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The other major sources of funding include Regional Selective Assistance (RSA) and the Single Regeneration Budget (SRB). RSA is unlikely to be of relevance in this instance as it is designed to support private sector projects. SRB is allocated on a regional and sub-regional basis to specific types of activity. As this funding is at a smaller-scale and shortly to come to an end it is also unlikely to be relevant in this instance.

This information should only be used as a guide to the availability of funding across the country. The availability of funding in specific areas should be examined in detail in relation to the project for which it is being sought at the time when the project is being brought forward. Additional funding at the local level may also be available.

European Regional Development Fund (ERDF)

ERDF is targeted at those regions that are most in need of help in order to meet the following objectives:

- ## Objective 1: Promoting the development and structural adjustment of regions where development is lagging behind
- ## Objective 2: Supporting the economic and social conversion of industrial, rural, urban and fisheries areas facing structural difficulties.

The European Commission has designated the eligible Objective 1 and 2 regions for 2002-06. ERDF is used to provide help in the form of grants towards project costs. Appendix J lists the availability of ERDF Objective 1 and 2 funding in the locations under consideration.

Many of the locations under review are designated as Objective 2 areas. However, the only areas under review designated as Objective 1 are Barnsley, Bridgend, Carrick, Liverpool, Neath Port Talbot, Rhondda Cynon Taff, Rotherham, Sheffield, Swansea and Wirral.

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Single Programme

The Regional Development Agencies (RDAs) have been given the freedom by central government to combine all of their funds into a Single Programme and their discretion to use this money as they think fit.

The RDAs have the ability to Gap Fund (i.e. bridge the gap between the high cost of development and low values). This would occur if there had been market failure within the area and/or there was a high cost of development due to contamination or abnormal ground conditions. Funding may be available for either speculative or bespoke development.

The award and level of Single Programme support to the public sector is at the discretion of the RDA. For the private sector the majority of Single Programme support is limited to Assisted Areas and those locations under review with Assisted Area status are listed in Appendix I.

Assisted Areas are split into two tiers with Tier 1 Assisted Areas being the highest grant priority areas within the UK followed by Tier Two Assisted Areas. The funds available depend on the size of the company carrying out the development with uplifts available for Small and Medium Enterprises (SMEs).

In Scotland and Wales similar grant is available to the private sector through Scottish Enterprise and the Welsh Development Agency respectively. Within these schemes the level of allocation of grant still adheres to the Assisted Areas status of the project location and the size of the company carrying out the development.

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Enterprise Zones (EZs)

The purpose of Enterprise Zones (EZs) has been to stimulate private sector economic activity through lessening the incidence of taxation and by relaxing or speeding up some statutory controls or regulations. Investors in the EZs have the ability to claim 100% tax allowances in respect of capital expenditure on commercial buildings. Occupiers of commercial premises within EZs benefit from exemption from the payment of Business Rates for a maximum of ten years, from the date they occupied the buildings until the end of the relevant designation periods. Developers and investors benefit from a simplified town planning regime facilitating the quick delivery of schemes.

There are four remaining UK Enterprise Zones:

- | | | | |
|----|---------------|----|----------------|
| £# | East Midlands | £# | East Durham |
| £# | Dearne Valley | £# | Tyne Riverside |

In January 2003 the Lanarkshire Enterprise Zone designation ended.

There are only four districts within the locations under review in this report that fall within Enterprise Zones as follows:

- £# Barnsley (Dearne Valley)
- £# Doncaster (Dearne Valley)
- £# Rotherham (Dearne Valley)
- £# North Tyneside (Tyne Riverside)

Three of the four remaining Enterprise Zones (East Midlands, East Durham, Dearne Valley) were designated in November 1995, so will lose this status in late October 2005. The fourth Enterprise Zone (Tyne Riverside) was designated during 1996 so will lose this status in 2006.

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4.6 EXISTING GOVERNMENT CLUSTERS

Many of the 102 locations under review already have a large presence of existing Government departments, suggesting that, all other things considered, such locations may be well placed to match relocation activities to similar departments due to transferable skill sets etc.

As part of this comparative assessment, King Sturge obtained a list of all central Government departments in each location under review from the ePIMS database managed by the Office of Government Commerce. The departments are listed in the master spreadsheet submitted to The Independent Review of Public Sector Relocation with the final report. As expected, those locations with a larger population generally have a greater current central Government presence.

Certain locations have a specific Government department focus such as the DVLA in Swansea, GCHQ in Cheltenham and the MoD on the outskirts of Bristol. However, this brief review has excluded those departments already included in Private Finance Initiative (PFI) projects such as Mapeley (STEPS project) or Land Securities Trillium (PRIME project).

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APPENDIX A

INFORMATION SUPPORT CONTACT CENTRE SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

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Appendix A: Information Support Contact Centre Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Blackburn with Darwen
Bolton
Bradford
Derry
Dudley
Fife
Kingston upon Hull
Kirklees
Leicester
Liverpool
North Lanarkshire
North Tyneside
Oldham
Peterborough
Rhondda, Cynon, Taff
Rochdale
Rotherham
Stockton-on-Tees
Stoke-on-Trent
Sunderland
Swansea
Telford and Wrekin
Walsall
Wigan
Wirral

SECOND QUARTILE
Belfast
Blackpool
Bury
Carlisle
Coventry
Falkirk
Gateshead
Knowsley
Leeds
Middlesbrough
Milton Keynes
Newcastle upon Tyne
Newcastle-under-Lyme
Northampton
Norwich
Nottingham
Plymouth
Sheffield
South Lanarkshire
Stockport
Torbay
Wakefield
Waveney
Wolverhampton
Wrexham

THIRD QUARTILE
Barnsley
Birmingham
Bournemouth
Bridgend
Cardiff
Carrick
Colchester
Derby
Doncaster
Glasgow City
Gloucester
Harrogate
Ipswich
Lancaster
Manchester
Medway UA
Neath Port Talbot
Poole
Preston
Salford
Southend-on-Sea
Stafford
Warrington
West Lothian
Worcester

FOURTH QUARTILE
Aberdeen
Ashford
Bath and North East Somerset UA
Bedford
Bristol
Cheltenham
Chester
Crewe and Nantwich
Dundee
Edinburgh, City of
Exeter
Great Yarmouth
Luton
Macclesfield
Newport
Nuneaton and Bedworth
Salisbury
Scarborough
Shrewsbury & Atcham
Solihull
Stratford-on-Avon
Swindon
Taunton Deane
Tendring
Trafford
Warwick
York

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Appendix A: Information Support Contact Centre Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE	SECOND QUARTILE
Blackburn with Darwen Blackpool Bolton Carlisle Carrick Derry Dudley Falkirk Fife Kingston upon Hull Kirklees Knowsley Leicester North Tyneside Peterborough Rhondda, Cynon, Taff Stockton-on-Tees Sunderland Swansea Telford and Wrekin Torbay Waveney Wigan Wirral Wrexham	Belfast Bradford Bridgend Bury Colchester Gateshead Gloucester Great Yarmouth Harrogate Ipswich Lancaster Liverpool Middlesbrough Milton Keynes Neath Port Talbot Newcastle-under-Lyme North Lanarkshire Norwich Oldham Plymouth Rochdale Rotherham Stoke-on-Trent Walsall Worcester
THIRD QUARTILE	FOURTH QUARTILE
Barnsley Bedford Bournemouth Coventry Crewe and Nantwich Doncaster Dundee Leeds Medway UA Newcastle upon Tyne Northampton Nottingham Nuneaton and Bedworth Poole Preston Scarborough Sheffield South Lanarkshire Southend-on-Sea Stafford Stockport Tendring Wakefield West Lothian Wolverhampton	Aberdeen Ashford Bath and North East Somerset UA Birmingham Bristol Cardiff Cheltenham Chester Derby Edinburgh, City of Exeter Glasgow City Luton Macclesfield Manchester Newport Salford Salisbury Shrewsbury & Atcham Solihull Stratford-on-Avon Swindon Taunton Deane Trafford Warrington Warwick York

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Appendix A: Information Support Contact Centre Scenario: Large Operations, in Alphabetical Order

TOP QUARTILE
Blackburn with Darwen
Bolton
Bradford
Coventry
Dudley
Fife
Kingston upon Hull
Kirklees
Leeds
Leicester
Liverpool
North Lanarkshire
North Tyneside
Oldham
Rhondda, Cynon, Taff
Rochdale
Rotherham
Stockport
Stockton-on-Tees
Sunderland
Swansea
Wakefield
Walsall
Wigan
Wirral

SECOND QUARTILE
Birmingham
Barnsley
Belfast
Blackpool
Bury
Derby
Doncaster
Glasgow City
Knowsley
Manchester
Milton Keynes
Newcastle upon Tyne
Northampton
Nottingham
Peterborough
Plymouth
Salford
Sheffield
South Lanarkshire
Stoke-on-Trent
Telford and Wrekin
Torbay
Warrington
Wolverhampton
Wrexham

THIRD QUARTILE
Bournemouth
Bridgend
Bristol
Cardiff
Carlisle
Colchester
Derry
Edinburgh, City of
Falkirk
Gateshead
Gloucester
Harrogate
Ipswich
Medway UA
Middlesbrough
Neath Port Talbot
Newcastle-under-Lyme
Norwich
Preston
Solihull
Southend-on-Sea
Stafford
Trafford
Waveney
West Lothian

FOURTH QUARTILE
Aberdeen
Ashford
Bath and North East Somerset UA
Bedford
Carrick
Cheltenham
Chester
Crewe and Nantwich
Dundee
Exeter
Great Yarmouth
Lancaster
Luton
Macclesfield
Newport
Nuneaton and Bedworth
Poole
Salisbury
Scarborough
Shrewsbury & Atcham
Stratford-on-Avon
Swindon
Taunton Deane
Tendring
Warwick
Worcester
York

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APPENDIX B

INTERACTIVE CONTACT CENTRE SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

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Appendix B: Interactive Contact Centre Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Belfast
Blackpool
Bolton
Bradford
Cardiff
Doncaster
Exeter
Fife
Kingston upon Hull
Kirklees
Leicester
Liverpool
Manchester
Middlesbrough
Newcastle upon Tyne
North Lanarkshire
North Tyneside
Nottingham
Preston
Sheffield
Stockton-on-Tees
Sunderland
Swansea
Wigan
Wirral

SECOND QUARTILE
Bath and North East Somerset UA
Blackburn with Darwen
Bury
Carrick
Derby
Derry
Dudley
Edinburgh, City of
Falkirk
Glasgow City
Lancaster
Leeds
Northampton
Norwich
Oldham
Peterborough
Plymouth
Rhondda, Cynon, Taff
Rochdale
Rotherham
Salford
Scarborough
Stoke-on-Trent
Torbay
West Lothian

THIRD QUARTILE
Barnsley
Bedford
Birmingham
Bournemouth
Bristol
Coventry
Dundee
Gloucester
Great Yarmouth
Ipswich
Knowsley
Medway UA
Milton Keynes
Newcastle-under-Lyme
South Lanarkshire
Southend-on-Sea
Stafford
Stockport
Swindon
Telford and Wrekin
Wakefield
Walsall
Warwick
Wolverhampton
York

FOURTH QUARTILE
Aberdeen
Ashford
Bridgend
Carlisle
Cheltenham
Chester
Colchester
Crewe and Nantwich
Gateshead
Harrogate
Luton
Macclesfield
Neath Port Talbot
Newport
Nuneaton and Bedworth
Poole
Salisbury
Shrewsbury & Atcham
Solihull
Stratford-on-Avon
Taunton Deane
Tendring
Trafford
Warrington
Waveney
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix B: Interactive Contact Centre Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE
Belfast
Blackpool
Carrick
Derry
Exeter
Falkirk
Fife
Kingston upon Hull
Lancaster
Leicester
Liverpool
Middlesbrough
Newcastle upon Tyne
North Tyneside
Norwich
Nottingham
Plymouth
Preston
Rhondda, Cynon, Taff
Scarborough
Stockton-on-Tees
Sunderland
Swansea
Torbay
Wirral

SECOND QUARTILE
Bath and North East Somerset UA
Bedford
Blackburn with Darwen
Bolton
Bournemouth
Bradford
Bury
Cardiff
Doncaster
Dundee
Great Yarmouth
Kirklees
Knowsley
Manchester
Newcastle-under-Lyme
North Lanarkshire
Northampton
Peterborough
Rochdale
Rotherham
Sheffield
Stafford
West Lothian
Wigan
York

THIRD QUARTILE
Bridgend
Carlisle
Cheltenham
Colchester
Derby
Dudley
Edinburgh, City of
Glasgow City
Gloucester
Harrogate
Ipswich
Leeds
Medway UA
Neath Port Talbot
Oldham
Salford
Shrewsbury & Atcham
Southend-on-Sea
Stockport
Stoke-on-Trent
Taunton Deane
Telford and Wrekin
Warwick
Waveney
Worcester
Wrexham

FOURTH QUARTILE
Aberdeen
Ashford
Barnsley
Birmingham
Bristol
Chester
Coventry
Crewe and Nantwich
Gateshead
Luton
Macclesfield
Milton Keynes
Newport
Nuneaton and Bedworth
Poole
Salisbury
Solihull
South Lanarkshire
Stratford-on-Avon
Swindon
Tendring
Trafford
Wakefield
Walsall
Warrington
Wolverhampton

**PUBLIC SECTOR RELOCATION PROJECT:
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Appendix B: Interactive Contact Centre Scenario: Large Operations, in Alphabetical Order

TOP QUARTILE
Belfast
Bolton
Bradford
Cardiff
Doncaster
Dudley
Fife
Glasgow City
Kingston upon Hull
Kirklees
Leeds
Leicester
Liverpool
Manchester
Newcastle upon Tyne
North Lanarkshire
North Tyneside
Nottingham
Preston
Rochdale
Sheffield
Sunderland
Swansea
Wigan
Wirral

SECOND QUARTILE
Birmingham
Blackburn with Darwen
Blackpool
Bristol
Bury
Coventry
Derby
Edinburgh, City of
Exeter
Knowsley
Middlesbrough
Northampton
Norwich
Oldham
Plymouth
Rhondda, Cynon, Taff
Rotherham
Salford
South Lanarkshire
Stockport
Stockton-on-Tees
Stoke-on-Trent
Wakefield
Walsall
West Lothian

THIRD QUARTILE
Barnsley
Bath and North East Somerset UA
Bedford
Bournemouth
Carrick
Derry
Dundee
Falkirk
Lancaster
Luton
Medway UA
Milton Keynes
Newcastle-under-Lyme
Peterborough
Scarborough
Southend-on-Sea
Stafford
Swindon
Telford and Wrekin
Torbay
Trafford
Warrington
Warwick
Wolverhampton
York

FOURTH QUARTILE
Aberdeen
Ashford
Bridgend
Carlisle
Cheltenham
Chester
Colchester
Crewe and Nantwich
Gateshead
Gloucester
Great Yarmouth
Harrogate
Ipswich
Macclesfield
Neath Port Talbot
Newport
Nuneaton and Bedworth
Poole
Salisbury
Shrewsbury & Atcham
Solihull
Stratford-on-Avon
Taunton Deane
Tendring
Waveney
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
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APPENDIX C

BACK OFFICE SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix C: Back Office Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Blackburn with Darwen
Bolton
Bradford
Dudley
Fife
Kingston upon Hull
Kirklees
Leicester
North Lanarkshire
North Tyneside
Oldham
Peterborough
Rhondda, Cynon, Taff
Rochdale
Rotherham
Stockton-on-Tees
Stoke-on-Trent
Sunderland
Telford and Wrekin
Wakefield
Walsall
Wigan
Wirral
Wolverhampton
Wrexham

SECOND QUARTILE
Barnsley
Belfast
Birmingham
Carlisle
Coventry
Derby
Derry
Doncaster
Falkirk
Gateshead
Knowsley
Leeds
Liverpool
Neath Port Talbot
Newcastle-under-Lyme
Northampton
Plymouth
Sheffield
South Lanarkshire
Stafford
Swansea
Torbay
Warrington
Waveney
West Lothian

THIRD QUARTILE
Blackpool
Bridgend
Bury
Colchester
Glasgow City
Gloucester
Harrogate
Luton
Manchester
Middlesbrough
Milton Keynes
Newcastle upon Tyne
Newport
Norwich
Nottingham
Nuneaton and Bedworth
Poole
Preston
Salford
Solihull
Southend-on-Sea
Stockport
Stratford-on-Avon
Swindon
Warwick

FOURTH QUARTILE
Aberdeen
Ashford
Bath and North East Somerset UA
Bedford
Bournemouth
Bristol
Cardiff
Carrick
Cheltenham
Chester
Crewe and Nantwich
Dundee
Edinburgh, City of
Exeter
Great Yarmouth
Ipswich
Lancaster
Macclesfield
Medway UA
Salisbury
Scarborough
Shrewsbury & Atcham
Taunton Deane
Tendring
Trafford
Worcester
York

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
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Appendix C: Back Office Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE
Blackburn with Darwen
Carlisle
Derry
Dudley
Falkirk
Fife
Gateshead
Kingston upon Hull
Kirklees
Leicester
Neath Port Talbot
Newcastle-under-Lyme
North Lanarkshire
North Tyneside
Peterborough
Rhondda, Cynon, Taff
Rotherham
Stockton-on-Tees
Stoke-on-Trent
Sunderland
Telford and Wrekin
Walsall
Waveney
Wigan
Wrexham

SECOND QUARTILE
Barnsley
Belfast
Bolton
Bradford
Bridgend
Carrick
Coventry
Gloucester
Harrogate
Knowsley
Newport
Northampton
Nuneaton and Bedworth
Oldham
Plymouth
Rochdale
South Lanarkshire
Stafford
Stratford-on-Avon
Swansea
Torbay
Wakefield
West Lothian
Wirral
Wolverhampton

THIRD QUARTILE
Birmingham
Blackpool
Bury
Colchester
Crewe and Nantwich
Derby
Doncaster
Great Yarmouth
Ipswich
Lancaster
Leeds
Liverpool
Middlesbrough
Milton Keynes
Norwich
Poole
Scarborough
Sheffield
Solihull
Southend-on-Sea
Swindon
Tendring
Warrington
Warwick
Worcester

FOURTH QUARTILE
Aberdeen
Ashford
Bath and North East Somerset UA
Bedford
Bournemouth
Bristol
Cardiff
Cheltenham
Chester
Dundee
Edinburgh, City of
Exeter
Glasgow City
Luton
Macclesfield
Manchester
Medway UA
Newcastle upon Tyne
Nottingham
Preston
Salford
Salisbury
Shrewsbury & Atcham
Stockport
Taunton Deane
Trafford
York

**PUBLIC SECTOR RELOCATION PROJECT:
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Appendix C: Back Office Scenario: Large Operations, in Alphabetical Order

TOP QUARTILE
Blackburn with Darwen
Bolton
Bradford
Coventry
Dudley
Fife
Kingston upon Hull
Kirklees
Leeds
Leicester
North Lanarkshire
North Tyneside
Oldham
Rhondda, Cynon, Taff
Rochdale
Rotherham
Stockton-on-Tees
Stoke-on-Trent
Sunderland
Telford and Wrekin
Wakefield
Walsall
Wigan
Wirral
Wolverhampton

SECOND QUARTILE
Barnsley
Belfast
Birmingham
Bury
Derby
Doncaster
Falkirk
Knowsley
Liverpool
Neath Port Talbot
Newcastle upon Tyne
Newcastle-under-Lyme
Northampton
Nottingham
Peterborough
Salford
Sheffield
Solihull
South Lanarkshire
Stafford
Stockport
Swansea
Warrington
West Lothian
Wrexham

THIRD QUARTILE
Blackpool
Bridgend
Bristol
Cardiff
Carlisle
Derry
Gateshead
Glasgow City
Gloucester
Harrogate
Luton
Manchester
Middlesbrough
Milton Keynes
Newport
Norwich
Nuneaton and Bedworth
Plymouth
Poole
Preston
Swindon
Torbay
Trafford
Warwick
Waveney

FOURTH QUARTILE
Aberdeen
Ashford
Bath and North East Somerset UA
Bedford
Bournemouth
Carrick
Cheltenham
Chester
Colchester
Crewe and Nantwich
Dundee
Edinburgh, City of
Exeter
Great Yarmouth
Ipswich
Lancaster
Macclesfield
Medway UA
Salisbury
Scarborough
Shrewsbury & Atcham
Southend-on-Sea
Stratford-on-Avon
Taunton Deane
Tendring
Worcester
York

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
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APPENDIX D

HIGHER VALUE BACK OFFICE SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix D: Higher Value Back Office Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Birmingham
Bournemouth
Bristol
Cardiff
Derby
Edinburgh, City of
Exeter
Fife
Glasgow City
Leeds
Leicester
Liverpool
Manchester
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Plymouth
Preston
Sheffield
Southend-on-Sea
Stockport
Swindon

SECOND QUARTILE
Aberdeen
Bath and North East Somerset UA
Bedford
Bolton
Bradford
Cheltenham
Colchester
Coventry
Dudley
Ipswich
Kingston upon Hull
Kirklees
Luton
Medway UA
North Lanarkshire
Salford
Sunderland
Swansea
Telford and Wrekin
Trafford
Warrington
Warwick
West Lothian
Wirral
York

THIRD QUARTILE
Ashford
Belfast
Blackpool
Bury
Chester
Doncaster
Falkirk
Gloucester
Macclesfield
Middlesbrough
North Tyneside
Oldham
Poole
Rochdale
Rotherham
Salisbury
Solihull
South Lanarkshire
Stafford
Stockton-on-Tees
Stoke-on-Trent
Stratford-on-Avon
Walsall
Wigan
Wolverhampton

FOURTH QUARTILE
Barnsley
Blackburn with Darwen
Bridgend
Carlisle
Carrick
Crewe and Nantwich
Derry
Dundee
Gateshead
Great Yarmouth
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Newport
Nuneaton and Bedworth
Rhondda, Cynon, Taff
Scarborough
Shrewsbury & Atcham
Taunton Deane
Tendring
Torbay
Wakefield
Waveney
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
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Appendix D: Higher Value Back Office Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE
Aberdeen
Bedford
Bournemouth
Bristol
Cardiff
Cheltenham
Derby
Edinburgh, City of
Exeter
Fife
Leeds
Leicester
Luton
Manchester
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Plymouth
Preston
Southend-on-Sea
Swindon
Warwick

SECOND QUARTILE
Bath and North East Somerset UA
Birmingham
Blackpool
Bradford
Colchester
Glasgow City
Gloucester
Ipswich
Kingston upon Hull
Liverpool
Macclesfield
Medway UA
Salford
Salisbury
Sheffield
Stockport
Stockton-on-Tees
Swansea
Telford and Wrekin
Trafford
Warrington
Waveney
West Lothian
Wirral
York

THIRD QUARTILE
Ashford
Belfast
Bolton
Carrick
Chester
Coventry
Derry
Doncaster
Dudley
Falkirk
Great Yarmouth
Kirklees
Lancaster
Middlesbrough
North Lanarkshire
North Tyneside
Poole
Rotherham
Solihull
Stafford
Stratford-on-Avon
Sunderland
Taunton Deane
Torbay
Wigan

FOURTH QUARTILE
Barnsley
Blackburn with Darwen
Bridgend
Bury
Carlisle
Crewe and Nantwich
Dundee
Gateshead
Harrogate
Knowsley
Neath Port Talbot
Newcastle-under-Lyme
Newport
Nuneaton and Bedworth
Oldham
Rhondda, Cynon, Taff
Rochdale
Scarborough
Shrewsbury & Atcham
South Lanarkshire
Stoke-on-Trent
Tendring
Wakefield
Walsall
Wolverhampton
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix D: Higher Value Back Office Scenario: Large Operations, in Alphabetical Order

TOP QUARTILE
Birmingham
Bradford
Bristol
Cardiff
Derby
Dudley
Edinburgh, City of
Glasgow City
Leeds
Leicester
Liverpool
Manchester
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Preston
Salford
Sheffield
Stockport
Swindon
Trafford
Warrington
Wirral

SECOND QUARTILE
Aberdeen
Bath and North East Somerset UA
Bedford
Belfast
Bolton
Bournemouth
Coventry
Exeter
Fife
Kingston upon Hull
Kirklees
Luton
Medway UA
North Lanarkshire
Peterborough
Plymouth
Rotherham
Solihull
Southend-on-Sea
Sunderland
Swansea
Walsall
Warwick
Wigan
Wolverhampton

THIRD QUARTILE
Barnsley
Blackpool
Bury
Cheltenham
Chester
Colchester
Doncaster
Falkirk
Gloucester
Ipswich
Macclesfield
Middlesbrough
North Tyneside
Oldham
Poole
Rhondda, Cynon, Taff
Rochdale
South Lanarkshire
Stafford
Stockton-on-Tees
Stoke-on-Trent
Telford and Wrekin
Wakefield
West Lothian
York

FOURTH QUARTILE
Ashford
Blackburn with Darwen
Bridgend
Carlisle
Carrick
Crewe and Nantwich
Derry
Dundee
Gateshead
Great Yarmouth
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Newport
Nuneaton and Bedworth
Salisbury
Scarborough
Shrewsbury & Atcham
Stratford-on-Avon
Taunton Deane
Tendring
Torbay
Waveney
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

APPENDIX E

POLICY SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix E: Policy Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Bedford
Birmingham
Bristol
Cardiff
Colchester
Coventry
Derby
Glasgow City
Ipswich
Leeds
Leicester
Liverpool
Luton
Manchester
Medway UA
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Sheffield
Southend-on-Sea
Swindon
Warrington

SECOND QUARTILE
Ashford
Bath and North East Somerset UA
Bolton
Bournemouth
Bradford
Cheltenham
Doncaster
Dudley
Edinburgh, City of
Exeter
Gloucester
Kingston upon Hull
Kirklees
Plymouth
Preston
Salford
Stockport
Swansea
Telford and Wrekin
Trafford
Wakefield
Walsall
Warwick
Wirral
Wolverhampton

THIRD QUARTILE
Aberdeen
Barnsley
Belfast
Chester
Fife
Great Yarmouth
Macclesfield
Middlesbrough
Newport
North Lanarkshire
Nuneaton and Bedworth
Poole
Rhondda, Cynon, Taff
Rotherham
Salisbury
Solihull
Stafford
Stoke-on-Trent
Sunderland
Taunton Deane
Tendring
Torbay
Waveney
Wigan
York

FOURTH QUARTILE
Blackburn with Darwen
Blackpool
Bridgend
Bury
Carlisle
Carrick
Crewe and Nantwich
Derry
Dundee
Falkirk
Gateshead
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
North Tyneside
Oldham
Rochdale
Scarborough
Shrewsbury & Atcham
South Lanarkshire
Stockton-on-Tees
Stratford-on-Avon
West Lothian
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix E: Policy Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE
Ashford
Bedford
Birmingham
Bournemouth
Bristol
Cheltenham
Colchester
Coventry
Derby
Exeter
Gloucester
Ipswich
Leicester
Luton
Manchester
Medway UA
Milton Keynes
Northampton
Norwich
Nottingham
Peterborough
Preston
Southend-on-Sea
Swindon
Telford and Wrekin

SECOND QUARTILE
Bath and North East Somerset UA
Bradford
Cardiff
Chester
Doncaster
Dudley
Edinburgh, City of
Glasgow City
Great Yarmouth
Kingston upon Hull
Kirklees
Leeds
Liverpool
Newcastle upon Tyne
Plymouth
Poole
Salisbury
Sheffield
Swansea
Taunton Deane
Tending
Warrington
Warwick
Waveney
Wolverhampton

THIRD QUARTILE
Aberdeen
Belfast
Bolton
Derry
Fife
Macclesfield
Middlesbrough
Newcastle-under-Lyme
Newport
Nuneaton and Bedworth
Rhondda, Cynon, Taff
Rotherham
Salford
Solihull
Stafford
Stockport
Stoke-on-Trent
Torbay
Trafford
Wakefield
Walsall
Wigan
Wirral
Worcester
York

FOURTH QUARTILE
Barnsley
Blackburn with Darwen
Blackpool
Bridgend
Bury
Carlisle
Carrick
Crewe and Nantwich
Dundee
Falkirk
Gateshead
Harrogate
Knowsley
Lancaster
Neath Port Talbot
North Lanarkshire
North Tyneside
Oldham
Rochdale
Scarborough
Shrewsbury & Atcham
South Lanarkshire
Stockton-on-Tees
Stratford-on-Avon
Sunderland
West Lothian
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix E: Policy Scenario: Large Operations, in Alphabetical Order

TOP QUARTILE
Birmingham
Bradford
Bristol
Cardiff
Coventry
Derby
Dudley
Glasgow City
Kirklees
Leeds
Leicester
Liverpool
Luton
Manchester
Medway UA
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Sheffield
Southend-on-Sea
Swindon
Warrington

SECOND QUARTILE
Bath and North East Somerset UA
Bedford
Bolton
Bournemouth
Colchester
Doncaster
Edinburgh, City of
Exeter
Gloucester
Ipswich
Kingston upon Hull
Plymouth
Preston
Rotherham
Salford
Solihull
Stockport
Telford and Wrekin
Trafford
Wakefield
Walsall
Warwick
Wigan
Wirral
Wolverhampton

THIRD QUARTILE
Aberdeen
Ashford
Barnsley
Belfast
Bury
Cheltenham
Chester
Fife
Newport
North Lanarkshire
North Tyneside
Nuneaton and Bedworth
Oldham
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Salisbury
South Lanarkshire
Stafford
Stockton-on-Tees
Stoke-on-Trent
Sunderland
Swansea
Tendring
York

FOURTH QUARTILE
Blackburn with Darwen
Blackpool
Bridgend
Carlisle
Carrick
Crewe and Nantwich
Derry
Dundee
Falkirk
Gateshead
Great Yarmouth
Harrogate
Knowsley
Lancaster
Macclesfield
Middlesbrough
Neath Port Talbot
Newcastle-under-Lyme
Scarborough
Shrewsbury & Atcham
Stratford-on-Avon
Taunton Deane
Torbay
Waveney
West Lothian
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix E: Policy Scenario: Travel Time to London Excluded, in Alphabetical Order

TOP QUARTILE
Birmingham
Bradford
Bristol
Coventry
Derby
Edinburgh, City of
Glasgow City
Ipswich
Leeds
Leicester
Liverpool
Manchester
Medway UA
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Plymouth
Preston
Salford
Sheffield
Swindon
Warrington

SECOND QUARTILE
Aberdeen
Bedford
Belfast
Bolton
Bournemouth
Cardiff
Colchester
Dudley
Exeter
Fife
Gloucester
Kingston upon Hull
Kirklees
Luton
North Lanarkshire
Southend-on-Sea
Stockport
Sunderland
Swansea
Telford and Wrekin
Trafford
Walsall
Wigan
Wirral
Wolverhampton

THIRD QUARTILE
Bath and North East Somerset UA
Blackpool
Cheltenham
Chester
Derry
Doncaster
Dundee
Falkirk
Great Yarmouth
Macclesfield
Middlesbrough
Oldham
Poole
Rhondda, Cynon, Taff
Rochdale
Rotherham
Solihull
South Lanarkshire
Stockton-on-Tees
Stoke-on-Trent
Torbay
Wakefield
Warwick
West Lothian
York

FOURTH QUARTILE
Ashford
Barnsley
Blackburn with Darwen
Bridgend
Bury
Carlisle
Carrick
Crewe and Nantwich
Gateshead
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Newport
North Tyneside
Nuneaton and Bedworth
Salisbury
Scarborough
Shrewsbury & Atcham
Stafford
Stratford-on-Avon
Taunton Deane
Tendring
Waveney
Worcester
Wrexham

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
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APPENDIX F

SCIENCE SCENARIO

RANKINGS BY QUARTILE

(IN ALPHABETICAL ORDER)

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Appendix F: Science Scenario: Base-Case, in Alphabetical Order

TOP QUARTILE
Birmingham
Bradford
Bristol
Coventry
Derby
Edinburgh, City of
Glasgow City
Ipswich
Leeds
Leicester
Liverpool
Manchester
Medway UA
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Plymouth
Preston
Salford
Sheffield
Swindon
Warrington

SECOND QUARTILE
Aberdeen
Bedford
Belfast
Bolton
Bournemouth
Cardiff
Colchester
Dudley
Exeter
Fife
Gloucester
Kingston upon Hull
Kirklees
Luton
North Lanarkshire
Southend-on-Sea
Stockport
Sunderland
Swansea
Telford and Wrekin
Trafford
Walsall
Wigan
Wirral
Wolverhampton

THIRD QUARTILE
Bath and North East Somerset UA
Blackpool
Cheltenham
Chester
Derry
Doncaster
Dundee
Falkirk
Great Yarmouth
Macclesfield
Middlesbrough
North Tyneside
Oldham
Poole
Rhondda, Cynon, Taff
Rochdale
Rotherham
Solihull
South Lanarkshire
Stockton-on-Tees
Stoke-on-Trent
Torbay
Wakefield
Warwick
West Lothian

FOURTH QUARTILE
Ashford
Barnsley
Blackburn with Darwen
Bridgend
Bury
Carlisle
Carrick
Crewe and Nantwich
Gateshead
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Newport
Nuneaton and Bedworth
Salisbury
Scarborough
Shrewsbury & Atcham
Stafford
Stratford-on-Avon
Taunton Deane
Tendring
Waveney
Worcester
Wrexham
York

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Appendix F: Science Scenario: Small Operations, in Alphabetical Order

TOP QUARTILE
Bedford
Bristol
Colchester
Derry
Edinburgh, City of
Exeter
Glasgow City
Gloucester
Ipswich
Leicester
Liverpool
Luton
Manchester
Medway UA
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Peterborough
Plymouth
Preston
Southend-on-Sea
Swindon
Telford and Wrekin

SECOND QUARTILE
Aberdeen
Ashford
Belfast
Birmingham
Bournemouth
Bradford
Cardiff
Cheltenham
Chester
Coventry
Derby
Fife
Great Yarmouth
Kingston upon Hull
Kirklees
Leeds
Salford
Salisbury
Sheffield
Swansea
Trafford
Warrington
Warwick
Waveney
Wirral

THIRD QUARTILE
Bath and North East Somerset UA
Blackpool
Bolton
Carrick
Doncaster
Dudley
Dundee
Falkirk
Macclesfield
Middlesbrough
North Lanarkshire
Poole
Rhondda, Cynon, Taff
Rotherham
Stockport
Stockton-on-Tees
Sunderland
Taunton Deane
Tendring
Torbay
Walsall
West Lothian
Wigan
Wolverhampton
Worcester

FOURTH QUARTILE
Barnsley
Blackburn with Darwen
Bridgend
Bury
Carlisle
Crewe and Nantwich
Gateshead
Harrogate
Knowsley
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Newport
North Tyneside
Nuneaton and Bedworth
Oldham
Rochdale
Scarborough
Shrewsbury & Atcham
Solihull
South Lanarkshire
Stafford
Stoke-on-Trent
Stratford-on-Avon
Wakefield
Wrexham
York

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Appendix F: Science Scenario: Large Operations in Alphabetical Order

TOP QUARTILE
Birmingham
Bolton
Bradford
Bristol
Coventry
Derby
Dudley
Edinburgh, City of
Glasgow City
Kirklees
Leeds
Leicester
Liverpool
Manchester
Milton Keynes
Newcastle upon Tyne
Northampton
Norwich
Nottingham
Plymouth
Preston
Salford
Sheffield
Trafford
Warrington

SECOND QUARTILE
Aberdeen
Belfast
Bournemouth
Cardiff
Colchester
Doncaster
Fife
Ipswich
Kingston upon Hull
Luton
Medway UA
North Lanarkshire
Peterborough
South Lanarkshire
Southend-on-Sea
Stockport
Sunderland
Swansea
Swindon
Telford and Wrekin
Wakefield
Walsall
Wigan
Wirral
Wolverhampton

THIRD QUARTILE
Barnsley
Bath and North East Somerset UA
Bedford
Blackpool
Bury
Cheltenham
Chester
Exeter
Falkirk
Gloucester
Knowsley
Macclesfield
Middlesbrough
Newport
North Tyneside
Oldham
Poole
Rhondda, Cynon, Taff
Rochdale
Rotherham
Solihull
Stockton-on-Tees
Stoke-on-Trent
Warwick
West Lothian

FOURTH QUARTILE
Ashford
Blackburn with Darwen
Bridgend
Carlisle
Carrick
Crewe and Nantwich
Derry
Dundee
Gateshead
Great Yarmouth
Harrogate
Lancaster
Neath Port Talbot
Newcastle-under-Lyme
Nuneaton and Bedworth
Salisbury
Scarborough
Shrewsbury & Atcham
Stafford
Stratford-on-Avon
Taunton Deane
Tendring
Torbay
Waveney
Worcester
Wrexham
York

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Appendix G: Universities* with significant level of research funding

University	Total research funding, 2000/01 (£s)
University of Manchester	31,884,823
The University of Leeds	27,542,665
The University of Sheffield	25,332,984
The University of Bristol	24,552,331
The University of Nottingham	23,035,678
The University of Newcastle-upon-Tyne	20,871,495
The University of Liverpool	19,635,271
The University of Warwick (Coventry)	17,607,392
The University of Manchester Institute of Science & Technology	13,564,642
The University of Leicester	12,709,450
University of Durham	11,890,629
The University of York	11,847,445

Source: Higher Education Statistics Agency, 2002

* excludes universities within London, the South East and part of the Eastern region. Universities with over £11.5m funding are included.

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Appendix H: Indices of Deprivation for Top Quartile Locations

The rankings for England are for 354 districts. Wales ranks 22 districts, Scotland 26 districts and Northern Ireland 26 districts. Therefore the data presented below is an indicator of the level of deprivation in a given location and is not directly comparable across all locations.

Locations ranked 1 are the most deprived.

INFORMATION SUPPORT CONTACT CENTRE	Indices of Deprivation Ranking	INTERACTIVE CONTACT CENTRE	Indices of Deprivation Ranking
Blackburn with Darwen	26	Belfast	2
Bolton	78	Blackpool	32
Bradford	64	Bolton	78
Derry	3	Bradford	64
Dudley	142	Cardiff	16
Fife	14	Doncaster	38
Kingston upon Hull	14	Exeter	123
Kirklees	93	Fife	14
Leicester	35	Kingston upon Hull	14
Liverpool	5	Kirklees	93
North Lanarkshire	4	Leicester	35
North Tyneside	71	Liverpool	5
Oldham	61	Manchester	7
Peterborough	133	Middlesbrough	44
Rhondda, Cynon, Taff	3	Newcastle upon Tyne	59
Rochdale	42	North Lanarkshire	4
Rotherham	34	North Tyneside	71
Stockton-on-Tees	111	Nottingham	12
Stoke-on-Trent	22	Preston	95
Sunderland	15	Sheffield	92
Swansea	12	Stockton-on-Tees	111
Telford and Wrekin	96	Sunderland	15
Walsall	54	Swansea	12
Wigan	57	Wigan	57
Wirral	70	Wirral	70

Source: Indices of Deprivation

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Appendix H: Indices of Deprivation for Top Quartile Locations (continued)

BACK OFFICE	Indices of Deprivation Ranking	HIGHER VALUE BACK OFFICE	Indices of Deprivation Ranking
Blackburn with Darwen	26	Birmingham	43
Bolton	78	Bournemouth	118
Bradford	64	Bristol	116
Dudley	142	Cardiff	16
Fife	14	Derby	104
Kingston upon Hull	14	Edinburgh, City of	24
Kirklees	93	Exeter	123
Leicester	35	Fife	14
North Lanarkshire	4	Glasgow City	1
North Tyneside	71	Leeds	146
Oldham	61	Leicester	35
Peterborough	133	Liverpool	5
Rhondda, Cynon, Taff	3	Manchester	7
Rochdale	42	Milton Keynes	190
Rotherham	34	Newcastle upon Tyne	59
Stockton-on-Tees	111	Northampton	168
Stoke-on-Trent	22	Norwich	65
Sunderland	15	Nottingham	12
Telford and Wrekin	96	Peterborough	133
Wakefield	62	Plymouth	84
Walsall	54	Preston	95
Wigan	57	Sheffield	92
Wirral	70	Southend-on-Sea	134
Wolverhampton	33	Stockport	204
Wrexham	13	Swindon	228

Source: Indices of Deprivation

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Appendix H: Indices of Deprivation for Top Quartile Locations (continued)

POLICY	Indices of Deprivation Ranking	SCIENCE	Indices of Deprivation Ranking
Bedford	188	Birmingham	43
Birmingham	43	Bradford	64
Bristol	116	Bristol	116
Cardiff	16	Coventry	75
Colchester	218	Derby	104
Coventry	75	Edinburgh, City of	24
Derby	104	Glasgow City	1
Glasgow City	1	Ipswich	115
Ipswich	115	Leeds	146
Leeds	146	Leicester	35
Leicester	35	Liverpool	5
Liverpool	5	Manchester	7
Luton	91	Medway UA	170
Manchester	7	Milton Keynes	190
Medway UA	170	Newcastle upon Tyne	59
Milton Keynes	190	Northampton	168
Newcastle upon Tyne	59	Norwich	65
Northampton	168	Nottingham	12
Norwich	65	Peterborough	133
Nottingham	12	Plymouth	84
Peterborough	133	Preston	95
Sheffield	92	Salford	28
Southend-on-Sea	134	Sheffield	92
Swindon	228	Swindon	228
Warrington	181	Warrington	181

Source: Indices of Deprivation

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Appendix I: Average house prices as at Q2-2003

Location	Average (£s)	Location	Average (£s)
Aberdeen	..	Neath Port Talbot	61,668
Ashford	173,832	Newcastle upon Tyne	117,506
Barnsley	70,221	Newcastle-under-Lyme	96,768
Bath and North East Somerset UA	207,978	Newport	101,380
Bedford	157,138	North Lanarkshire	..
Belfast	..	North Tyneside	95,791
Birmingham	120,755	Northampton	128,039
Blackburn with Darwen	62,559	Norwich	122,216
Blackpool	76,464	Nottingham	100,408
Bolton	77,079	Nuneaton and Bedworth	102,095
Bournemouth	171,329	Oldham	67,624
Bradford	82,563	Peterborough	112,654
Bridgend	85,929	Plymouth	107,707
Bristol	153,711	Poole	202,378
Bury	93,163	Preston	85,751
Cardiff	139,643	Rhondda, Cynon, Taff	63,173
Carlisle	88,558	Rochdale	78,262
Carrick	183,919	Rotherham	90,929
Cheltenham	180,043	Salford	81,806
Chester	146,023	Salisbury	196,007
Colchester	156,604	Scarborough	102,211
Coventry	101,203	Sheffield	98,820
Crewe and Nantwich	116,991	Shrewsbury & Atcham	136,576
Derby	97,242	Solihull	188,233
Derry	..	South Lanarkshire	..
Doncaster	79,526	Southend-on-Sea	144,755
Dudley	111,108	Stafford	136,756
Dundee	..	Stockport	129,353
Edinburgh, City of	..	Stockton-on-Tees	90,461
Exeter	151,771	Stoke-on-Trent	55,973
Falkirk	..	Stratford-on-Avon	219,695
Fife	..	Sunderland	87,807
Gateshead	85,258	Swansea	89,975
Glasgow City	..	Swindon	142,350
Gloucester	122,403	Taunton Deane	149,185
Great Yarmouth	103,333	Telford and Wrekin	110,948
Harrogate	186,320	Tendring	140,443
Ipswich	117,672	Torbay	134,537
Kingston upon Hull	54,634	Trafford	160,970
Kirklees	92,563	Wakefield	93,209
Knowsley	72,105	Walsall	102,857

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Location	Average (£s)	Location	Average (£s)
Lancaster	97,413	Warrington	123,854
Leeds	116,788	Warwick	195,621
Leicester	104,292	Waveney	120,505
Liverpool	74,202	West Lothian	..
Luton	127,968	Wigan	79,003
Macclesfield	193,170	Wirral	96,644
Manchester	81,244	Wolverhampton	97,388
Medway UA	131,573	Worcester	137,839
Middlesbrough	56,923	Wrexham	105,971
Milton Keynes	164,433	York	144,554

Source: HM Land Registry, Q2-2003. Average house prices in £s. Data are not available from this source for Scotland.

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Appendix J: Financial Support – Grant Status

Location (district)	Single Programme (Tier 1 or 2)	European Regional Development Fund (Objective 1 or 2)
Aberdeen	..	..
Ashford	..	..
Barnsley	TIER 1	OBJ 1
Bath and North East Somerset	..	..
Bedford	..	..
Belfast	TIER 1	In transition (Obj 1)
Birmingham	Tier 2 (34 wards)	Obj 2 (34 wards)
Blackburn with Darwen	Tier 2 (21 wards)	Obj 2 (14 wards)
Blackpool	..	Obj 2 (12 wards)
Bolton	Tier 2 (8 wards)	Obj 2 (9 wards)
Bournemouth	..	..
Bradford	..	Obj 2 (14 wards)
Bridgend	TIER 1	OBJ 1
Bristol	..	Obj 2 (5 wards)
Bury	..	Obj 2 (1 ward)
Cardiff	Tier 2 (7 wards)	Obj 2 (10 wards)
Carlisle	..	Obj 2 (4 wards)
Carrick	TIER 1	OBJ 1
Cheltenham	..	..
Chester	Tier 2 (6 wards)	..
Colchester	..	..
Coventry	Tier 2 (15 wards)	Obj 2 (11 wards)
Crewe and Nantwich	..	..
Derby	..	Obj 2 (5 wards)
Derry	TIER 1	In transition (Obj 1)
Doncaster	..	..
Dudley	Tier 2 (13 wards)	Obj 2 (9 wards)
Dundee	Tier 2 (40 wards)	Obj 2 (24 wards)
Edinburgh, City of	Tier 2 (2 wards)	..
Exeter	..	..
Falkirk	Tier 2 (16 wards)	Obj 2 (7 wards)
Fife	..	Obj 2 (55 wards)
Gateshead	Tier 2 (18 wards)	Obj 2 (21 wards)
Glasgow City	Tier 2 (46 wards)	Obj 2 (41 wards)
Gloucester	..	..
Great Yarmouth	Tier 2 (6 wards)	Obj 2 (15 wards)
Harrogate	..	Obj 2 (5 wards)
Ipswich	..	..
Kingston upon Hull	Tier 2 (13 wards)	Obj 2 (20 wards)
Kirklees	..	Obj 2 (13 wards)
Knowsley	..	..
Lancaster	Tier 2 (18 wards)	Obj 2 (8 wards)
Leeds	..	Obj 2 (6 wards)
Leicester	..	Obj 2 (10 wards)
Liverpool	TIER 1	OBJ 1
Luton	Tier 2 (10 wards)	Obj 2 (13 wards)
Macclesfield	..	..
Manchester	Tier 2 (9 wards)	Obj 2 (32 wards)
Medway UA
Middlesbrough	Tier 2 (15 wards)	Obj 2 (25 wards)
Milton Keynes

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Location (district)	Single Programme (Tier 1 or 2)	European Regional Development Fund (Objective 1 or 2)
Neath Port Talbot	TIER 1	OBJ 1
Newcastle upon Tyne	Tier 2 (14 wards)	Obj 2 (24 wards)
Newcastle-under-Lyme	Tier 2 (13 wards)	Obj 2 (5 wards)
Newport	Tier 2 (6 wards)	Obj 2 (9 wards)
North Lanarkshire	..	Obj 2 (53 wards)
North Tyneside	Tier 2 (20 wards)	Obj 2(18 wards)
Northampton	..	..
Norwich	..	..
Nottingham	Tier 2 (10 wards)	Obj 2 (26 wards)
Nuneaton and Bedworth	Tier 2 (4 wards)	Obj 2 (4 wards)
Oldham	Tier 2 (16 wards)	Obj 2 (8 wards)
Peterborough	..	..
Plymouth	Tier 2 (19 wards)	Obj 2 (15 wards)
Poole	..	..
Preston	..	Obj 2 (8 wards)
Rhondda, Cynon, Taff	TIER 1	OBJ 1
Rochdale	Tier 2 (9 wards)	Obj 2 (11 wards)
Rotherham	TIER 1	OBJ 1
Salford	Tier 2 (9 wards)	Obj 2 (19 wards)
Salisbury	..	..
Scarborough	..	Obj 2 (21 wards)
Sheffield	TIER 1	OBJ 1
Shrewsbury & Atcham	..	Obj 2 (2 wards)
Solihull	Tier 2 (9 wards)	Obj 2 (4 wards)
South Lanarkshire	..	Obj 2 (12 wards)
Southend-on-Sea	..	Obj 2 (7 wards)
Stafford	Tier 2 (2 wards)	..
Stockport	..	Obj 2 (3 wards)
Stockton-on-Tees	Tier 2 (28 wards)	Obj 2 (30 wards)
Stoke-on-Trent	Tier 2 (16 wards)	Obj 2 (14 wards)
Stratford-on-Avon	..	..
Sunderland	Tier 2 (25 wards)	Obj 2 (24 wards)
Swansea	TIER 1	OBJ 1
Swindon	..	..
Taunton Deane	..	..
Telford and Wrekin	..	..
Tendring	..	..
Torbay	..	Obj 2 (6 wards)
Trafford	Tier 2 (4 wards)	Obj 2 (2 wards)
Wakefield	Tier 2 (19 wards)	Obj 2 (20 wards)
Walsall	Tier 2 (15 wards)	Obj 2 (16 wards)
Warrington	Tier 2 (3 wards)	..
Warwick	..	..
Waveney	..	..
West Lothian	Tier 2 (15 wards)	Obj 2 (7 wards)
Wigan	Tier 2 (21 wards)	Obj 2 (14 wards)
Wirral	TIER 1	OBJ 1
Wolverhampton	Tier 2 (15 wards)	Obj 2 (16 wards)
Worcester
Wrexham
York

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Appendix K: Data Sources

Employment-based: labour market capacity and skills levels

The data listed below all contribute to the assessment of labour market conditions and skill levels.

- ## **District population.** Population at the district (local authority) level from the 2001 Census.
- ## **Population growth.** Projected growth in population at the district level for the periods 2000-2006 and 2000-2010. The latest official projections for English districts are the ONS 2000-based sub-national population projections. Equivalent 2000-based projections were used for the Scottish districts (source: General Register Office for Scotland) and Northern Ireland districts (source: NISRA). The latest official projections for Wales at the local level are the 1998-based projections by regional group. These cover the periods 2001-2006 and 2001-2011. The corresponding regional group was used for each Welsh district under review (eg. Cardiff falls within South East Wales).
- ## **Percentage of working age population.** Working age population is defined as males aged 16-64 and females aged 16-59, the data were sourced from the 2001 Census at district level.
- ## **Percentage of working age population, economically active.** The data were sourced from the Labour Force Survey (2001) for England, Scotland and Wales and the 2001 Census for Northern Ireland. The economically active is the proportion of working age population within the district in the labour force (i.e. those in employment or actively seeking employment).

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- ## **Unemployment rate.** The district claimant count unemployment rate as at May-2003 has been used, source ONS. This measures the percentage of resident working age population that are unemployed and claiming unemployment-related benefits and is updated on a monthly basis. This is a different measure from the ILO (International Labour Organisation) measure of unemployment which is a count of jobless people who want to work, are available to work, and are actively seeking employment.
- ## **Educational attainment.** The percentage of working age population whose highest qualification is Level 2, 3 or 4 and above (resident-based). Sourced from the Labour Force Survey (2001) and the Northern Ireland Census. **Level 2** qualifications comprise five or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent. **Level 3** qualifications comprise two or more A levels, advanced GNVQ, NVQ 3, two or more higher or advanced higher national qualifications (Scotland) or equivalent. **Level 4** or above qualifications comprise HND, Degree and Higher Degree level qualifications or equivalent. Educational attainment is a good measure of the skills level within a district.
- ## **Average gross weekly earnings.** Average earnings for full-time employees on adult rates at the district level were sourced from the New Earnings Survey (2002). In light of the Chancellor's proposal to develop public service pay systems that are more responsive to regional labour market conditions, it was more relevant to include average weekly earnings data than public sector labour costs.
- ## **Total employment.** Employee-based data from the Annual Business Inquiry (2001) provided data on the total number of jobs at district level (workplace-based).

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- # **Employment by sector.** The proportion of employment by sector (workplace-based) was derived from employee-based data from the Annual Business Inquiry (2001). The breakdown of employment by the following broad industrial groups was recorded: agriculture & fishing; energy & water; manufacturing; construction; distribution, hotels & restaurants; transport & communications; banking, finance & insurance; public administration, education & health and other services.
- # **Occupation share:** Experian Business Strategies provided data on the occupation share of employees within each district (workplace-based). The occupation share is classified as Knowledge Workers, People Workers and Other Workers. **Knowledge Workers** comprise managers, professionals and associate professionals and technical occupations. **People Workers** comprise personal service occupations, sales and customer services. **Other Workers** comprise administration and secretarial, skilled trades, plant and machinery operatives and elementary occupations.
- # **Average travel to work time.** Data from the Labour Force Survey (autumn 2002) on average travel to work time by place of work in minutes.
- # **Catchment population.** The population resident within a 30-minute drive time (off-peak rush hour) of the main town or city within the district. The data were generated using geo-demographic software provided to King Sturge by Experian Business Strategies. The data indicate the size of the population within a commutable area and are not restricted to district boundaries.

Accommodation-based and existing Government activity

The data listed below all contribute to the assessment of property markets and their future capacity. Additional data were sourced directly from the King Sturge network of 16 UK offices and are outlined later in this section.

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- ## **Built office stock (ft²).** The Office of the Deputy Prime Minister and Valuation Office publish data on built office stock within the *Commercial and Industrial Floorspace and Rateable Value Statistics*. The latest data, as at 2002, covers districts within England and Wales. The stock figures for districts in Scotland have been assessed using data from Property Market Analysis, the Scottish Property Network and King Sturge market knowledge. Northern Ireland stock figures are based on King Sturge market knowledge.
- ## **Surplus supply within the Government estate.** The ePIMS database, held and managed by the Office of Government Commerce, was interrogated during early August 2003 for any office space within the existing Government estate that is currently available for occupation, is known to be available in the future or will potentially be available in the future. The data have been sorted into current and future surplus within the existing Government estate.
- ## **Existing Government departments.** The ePIMS database was also used to ascertain which central Government departments are currently present in each location under review.

Transport links with central London

- ## **Travel time to central London by rail.** The national rail enquiries website (www.nationalrail.co.uk) was used to determine the travel time by rail from the main town/city in each district under review to central London.
- ## **Travel time to central London by road.** The on-line AA routeplanner (www.theaa.com) was used to determine the travel time by road from the main town/city in each district under review to central London.
- ## **Nearest airport.** The nearest airport to the main town/city in each district under review was recorded. King Sturge is aware that regional airports provide a mode of travel to and from central London, especially with the growth of low-cost carriers and more frequent routes. However, no consistent set of data (unlike rail travel) is available for the 102 locations considered in this report.

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Telecoms infrastructure

Cable provider. Following discussions with OFTEL, it was determined that the key cable providers outside of London and the South East are Telewest and NTL. Using the postcode search facility on the Telewest (www.telewest.co.uk) and NTL (www.ntl.com) websites, the service options available at a central point within the main town/city were assessed. This is not site specific. King Sturge has found through other work that some sites are a significant distance from a 'central point' thus making the cost of introducing cabling expensive to a particular site.

Quality of life factors

House prices: for England and Wales, data on average house prices from HM Land Registry has been used. This is as at Q2-2003 and provides average house prices for Detached, Semi-detached, Terraced, Flats/Maisonettes and an Overall average. For Scotland and Northern Ireland data from the Valuation Office have been used for similar property types; an overall average is not available.

School league tables. The Department for Education and Skills publishes annual secondary school performance tables, providing guidance on the achievement levels of schools in England. The Local Education Authority average measure can be used to assess the performance of an area as a whole against the England average. Comparable information is not available for Wales, Scotland and Northern Ireland.

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King Sturge Data

Information on commercial property costs, and the availability of office accommodation, was sourced from the King Sturge regional office network to provide market judgements of the following:

- ## **Prime office rents:** hypothetical rents (£ ft²) achieved on prime office space (Grade A) within the town centre and out of town markets. There is generally some variation between the rental values achieved in the town centre and out of town markets. A prime rent is the best rent, at any one moment in time, which can be obtained for a high quality building if let on the most favourable lease terms by an investor. Most prime buildings are regarded as ‘investment’ grade for institutional (life funds, pension funds etc) purposes. In town/city centre locations prime (or Grade A) buildings will generally have air-conditioning and raised floors. This is not always the case with prime buildings on business parks that will often offer good car parking provision.
- ## **Secondary office rents:** hypothetical rents (£ ft²) achieved on secondary office space (Grades B and C) within the town centre and out of town markets. Again, there is generally some variation between the rental values achieved in the town centre and out of town markets. Secondary buildings are less likely to be suitable for institutional investment.
- ## **Available Grade A space:** the level of Grade A (prime) space currently available in the town centre and out of town markets in each location. This has been measured in square feet.

The assessment of office rents and available Grade A space has been carried out for both in town and out-of-town office locations. The **in town market** is expected to be in or near the Central Business District while the **out of town market** will normally be focussed on an established office park or campus on the edge of or outside the traditional town centre.

**PUBLIC SECTOR RELOCATION PROJECT:
COMPARATIVE ASSESSMENT OF LOCATIONS
FINAL REPORT**

Through the King Sturge network of regional offices, a short **survey of the locations** under review was also undertaken to allow considered judgemental comments to be made on the ability of locations to accommodate increased Government activity. The survey allowed judgements to be made on the following:

- ## **Grade A space:** whether the location is under or over supplied or in line with current levels of demand.
- ## **Grade B/C space:** whether the location is under or over supplied or in line with current levels of demand.
- ## **Development pipeline:** whether the pipeline for future office development in each location is considered to be constrained, over-supplied or adequate to meet future demand.
- ## **Increased Government activity:** to what extent the location can accommodate increased activity over the next three to five years. Would the property market be well placed in terms of capacity and available product or would it struggle to meet the need