CABINET MEMBER FOR ECONOMIC DEVELOPMENT, PLANNING AND TRANSPORTATION

Venue: **Training Room (Rooms 3/4), 3rd Floor, Bailey House, Rawmarsh Road, ROTHERHAM. S60 1TD**

Date: **Monday, 19th July, 2010**

Time: **10.15 a.m. approx (or at the rising of the Joint meeting)**

A G E N D A

1. To determine if the following matters are to be considered under the categories suggested in accordance with Part 1 of Schedule 12A (as amended March 2006) to the Local Government Act 1972.

2. To determine any item which the Chairman is of the opinion should be considered later in the agenda as a matter of urgency.

3. Report re:- opening of offers/tenders (Pages 1 - 2)

4. Minutes of a meeting of the Transport Liaison Group held on 28th June, 2010 (Pages 3 - 8)

5. Petition re: Traffic Noise Pollution on Westfield Road, S63 6LS (Pages 9 - 10)

6. Directional Signing Policies (Pages 11 - 55)
   Richard Pardy, Assistant Engineer, to report.
   - to seek authority to update the existing policy and procedure for Tourist signing and to implement new codes of practice and policies for 3rd Party signing and Temporary event signing.

7. Rotherham's Local Economic Assessment (Pages 56 - 190)
   Simeon Leach, Economic Strategy Manager, to report.
   - to present to the meeting the first draft of Rotherham's Local Economic Assessment (LEA), seek comments on the layout and content of the document and ask for agreement that it be circulated for consultation to the wider Council, the Local Strategic Partnership and other relevant local partners.

8. Reallocation of Rotherham Economic Regeneration Fund (RERF) and Local Authority Business Grant Incentives (LABGI) (Pages 191 - 193)
   Simeon Leach, Economic Strategy Manager, to report.
   - to consider the proposed reallocations.

9. EXCLUSION OF THE PRESS AND PUBLIC
   The following item is likely to be considered in the absence of the press and public as being exempt under Paragraph 3 of Part 1 of Schedule 12A to the

Local Government Act 1972 (as amended March 2006) (information relating to the financial or business affairs of any particular individual (including the Council)):-

10. Approval of consultants for Building Consultants Framework (Pages 194 - 198)
Brian Barratt, Design Consultancy Manager, to report.
- to seek approval to the list of framework consultants shown on the attached lists for building and estates consultancy services for the period 2010 – 2013.

11. Lincoln Street Workshops, Maltby (Pages 199 - 205)
Carole Smith, Strategic Property Manager, to report.
- to consider the position

ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS

1.	**Meeting:**	**Cabinet Member for Economic Development, Planning & Transportation**
2.	**Date:**	**19^{th} JULY, 2010**
3.	**Title:**	**OPENING OF E-TENDERS AND OFFERS**
4.	**Directorate:**	**Chief Executive's**

5. Summary

The purpose of this report is to record the following:-

(i) opening of offers for William Street Garage Site, Wellgate, Rotherham

5. Recommendation:-

That the action of the Cabinet Member in opening the e-tenders and offers be recorded.

7. Proposals and Details

The following were opened by the Cabinet Member for Economic Development, Planning and Transportation

on 28th June, 2010:-

- offers for William Street Garage Site, Wellgate, Rotherham

8. Finance

To secure value for money.

9. Risks and Uncertainties

Service implications should top soil not be available for works and projects.

10. Policy and Performance Agenda Implications

In accordance with financial and contractual requirements.

11. Background Papers and Consultation

Emails: Senior Valuer

Contact Name : Janet Cromack, Senior Democratic Services Officer
Ext: 22055
Email: janet.cromack@rotherham.gov.uk

RMBC TRANSPORT LIAISON GROUP
Monday, 28th June, 2010

Present:- Councillor Smith (in the Chair); Councillors Buckley, Dodson, Pickering, R. S. Russell, Swift, Wootton and Whelbourn.

together with:-

Mark Hampson	Green Road
Brandon Jones	First South Yorkshire
Richard Simons	First South Yorkshire
John Bickerton	First Group
Pam Horner	SYPTE
Rupert Cox	Stagecoach Yorkshire
Stephen Hewitson	Rotherham Community Transport
Jason Thomas	WSP
Andy Poole	WSP
Ian Ashmore	RMBC Principal Traffic Officer
Andy Butler	RMBC Senior Engineer

1. WELCOME AND INTRODUCTIONS

Councillor Gerald Smith, Cabinet Member for Economic Development, Planning and Transportation (Chair), welcomed everyone present to the meeting and introductions were made.

2. APOLOGIES FOR ABSENCE

Apologies for absence were received from:-

Councillor J. Austen	RMBC Ward 6 (Holderness)
Councillor A. Atkin	RMBC Ward 19 (Wath)
Councillor J. Falvey	RMBC Ward (Dinninton)
Shayne Howarth	Stagecoach Yorkshire
Paul Lynch	Stagecoach Yorkshire
David Stevenson	Stagecoach East Midlands
Adrian Kemp	WSP

3. MINUTES OF THE PREVIOUS MEETING HELD ON 22ND MARCH, 2010

The minutes of the previous meeting held on 22nd March, 2010, were noted.

4. MATTERS ARISING

Reference was made to the following item:-

Item 7 – Road Safety – South Yorkshire Safety Camera Partnership – particular reference was made to problems outside Anston Fence School. Concern was also expressed that the listed locations of the cameras appeared unchanged.

It was explained that the cameras were located in areas where incidents and speed were an issue. It was pointed out that 2 mobile cameras were also available.

5. DRIVE GREEN PROJECT

Brandon Jones, Commercial Director, First South Yorkshire Limited, introduced the Drivegreen initiative being rolled out across First's fleet.

John Bickerton, FirstGroup plc, with the assistance of a presentation, explained the aims and objectives of the project together with the technology involved.

Reference was made to:-

- Installation in South Yorkshire and in Rotherham since January 2010
- 8,500 vehicles fitted across the UK
- Use as a management tool
- Reduced fuel consumption and reduced fuel costs
- Reduced vehicle maintenance costs
- Improved safety and passenger comfort when travelling by bus
- Accident reduction
- Maintaining ISO 1401 Environmental Standards
- Drivers able to monitor their own performance
- Vehicle tracking, trips history and identification of risk events/locations

The following issues were raised and discussed:-

- Effect on timetables
- Drivers' reaction
- Amount of fuel saved
- Rate of return on investment
- Better engine life of vehicles

The Chairman thanked Brandon and John for their interesting and informative presentation.

6. UPDATES FROM THE TRANSPORT OPERATORS

(i) First Group

Richard Simons reported only small scale changes were planned for the end of July, primarily a number of minor adjustments to timetables to improve punctuality, or connectivity, with changes on Sheffield services.

Also a special timetable was to be introduced during the schools summer holiday on the Maltby route due to reduced demand in previous years.

The following issue was raised and discussed:-

- Services to the Hellaby industrial estate to cater for shift workers

Concern was expressed that some shift workers experienced difficulties getting to work, particularly in the early mornings as there were no bus services at that time.

It was explained that First operated 2 services into the estate, the use of which was variable. The service operated every half an hour from 7 a.m.

It was stressed that the Service had to be run on a commercial basis reliant on revenue.

It was agreed:- That a Travel Planner be asked to visit employers on the estate to gather information and to find out if the employers would be willing to contribute to cost of tickets.

(ii) Northern Rail

No representative was present.

(iii) Rotherham Community Transport

Stephen Hewitson reported that there were no service changes.

Copies of the following leaflets were distributed:-

- Door2Door Services in Rotherham – local service that comes to you
- Your guide to using Door 2 Door

Information was also provided in respect of Rotherham Shop Mobility Scheme - pilot project in conjunction with Rotherham Access Group, Shopmobility Barnsley and the Community Links worker. The scheme provided for shopping in Parkgate Retail World and in Rotherham town centre. The pilot began on 7th June and would operate until 28th August, 2010.

An invitation was extended to those present to attend the General Meeting of Rotherham Community Transport which was to be held on Wednesday, 14th July, 2010 at 10 a.m. at the Unity Centre, St. Leonard's Road, Rotherham.

(iv) South Yorkshire Passenger Transport Executive

Pam Horner reported that all Members should have received copies of the changes due to take place. It was pointed out that the most significant changes were in services in Sheffield.

Reference was made to the following:-

- Withdrawal of Powell's Service 396 – commercial service between Rotherham and Doncaster which serviced Piccadilly in Swinton and Windhill in Conisbrough. A request had been made for the service to be mapped as part of the tender criteria to see how many households would be affected. However it was pointed out if the service was not commercially viable the PTE was not in a position to contract for a service.

- Veolia – Services in Brinsworth, Catcliffe and Treeton:- reference was made to reported concerns about poor performance of services in this area. It was explained that when a breakdowns occurred and there were insufficient vehicles then vehicles were taken from the commercial operations and put to the contracted service. However, Veolia now had a depot in Rotherham for a speedier change over and the PTE was managing any complaints.

- South Rotherham and Rotherham Bus Vision:- those present were provided with a pack/digi brief.

The following issue was raised and noted:-

- Buses using narrow roads in the Ulley Area

(v) Stagecoach East Midlands

There were no issues or changes to report.

(vi) Stagecoach Yorkshire

Rupert Cox reported that there were no changes to timetables.

The Chairman thanked all the operators for their updates.

7. UPDATES FROM RMBC TRANSPORTATION UNIT

Andy Butler, RMBC Senior Engineer, reported on the following:-

(i) Local Transport Capital Programme 2010/11

It was reported that the Council had 2 major schemes programmed:-

- Signalisation of Mushroom Roundabout
- Wickersley Road/Broom Lane A6021

Details of both schemes could be found via the Council's website.

A further report would be submitted to the Cabinet Member in respect of the reduced budget available.

Reference was made to the operation of Whiston Crossroads and right turning traffic. It was confirmed that the operation of the crossroads was being monitored and a post scheme implementation review report would be forthcoming.

(ii) Speed Limit Review of A and B Roads

It was reported that all local authorities had been required by Government to review speed limits on A and B class roads. Rotherham had done this as part of a South Yorkshire wide review.

Changes proposed this year included:-

- Pleasley Road – reduction from 40mph to 30mph
- Tickhill road, Maltby – reduction from 40mph to 30mph
- Wath Road/Bolton Road – split changes:- from derestricted to 40mph and from 50 mph to 40 mph to tie in with the existing speed limit on the Doncaster section
- Redhill, Kiveton Park – from 40mph to 30mph
- Stubbin Road, Rawmarsh – as part of a local speed reduction scheme
- Worrygoose Lane – derestricted to 40mph
- Fishpond Lane, Braithwell – currently 30mph to derestricted

A further list had been drawn up where physical measures were planned in order to engineer speeds down:-

- A629 Upper Wortley Road
- A629 Droppingwell Road
- A6021 Broom Road/Wickersley Road

Members referred to:-

- Speed limit signing outside Aston Fence School
- West Bawtry Road – Whiston Crossroads to Canklow – noting the review had suggested that the speed limit should remain at 50mph, and that the request of a pedestrian crossing did not meet the required criteria.

8. SIGNALISATION OF MUSHROOM ROUNDABOUT

Jason Thomas and Andy Poole, WSP Consulting Engineers, gave a presentation on proposals for the signalisation of Mushroom Roundabout.

It was explained that this was a joint PTE and Council solution to significant traffic issues particularly in the peak period. Therefore options to reduce congestion, improve bus journey times and reliability on the Rotherham via Thrybergh route to Doncaster, and to improve pedestrian and cycling facilities had been explored and tested using micro-simulation modelling.

Reference was made to various options identified and their respective benefits and dis-benefits. It was explained that option 4 was the signalisation of the roundabout. A further revised option had been modelled using MOVA which optimised the operation of the traffic lights to ensure they were working as efficiently as possible to keep traffic moving and allow pedestrians to cross. This scheme included the in filling of the existing subway on Fitzwilliam Road and the provision of an on carriageway traffic light controlled pedestrian crossing.

Videos of the evening peak showing the base information and the MOVA model illustrated the impact of signalisation, with further reduction in queuing on Aldwarke Lane. The benefits for buses were highlighted. The morning peak had also similarly been modelled.

As a result the full signalisation scheme with MOVA control had been recommended to the Cabinet Member for Economic Development, Planning and Transportation and approved subject to funding.

Those present raised and discussed the following:-

- the data on which the model was based on and how realistic were their projections
- cost of the scheme and reduced funding for this scheme

9. ANY OTHER BUSINESS

No other items of business were raised.

10. PROPOSE MEETING DATES FOR FUTURE MEETING

The following dates of meetings were agreed:-

WEDNESDAY, 29TH SEPTEMBER, 2010 AT 2.00 P.M.

WEDNESDAY, 15TH DECEMBER, 2010 AT 2.00 P.M.

WEDNESDAY, 16TH MARCH, 2011 AT 2.00 P.M.

WEDNESDAY, 15TH JUNE, 2011 AT 2.00 P.M.

ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS

1.	**Meeting:**	**Cabinet Member for Economic Development, Planning & Transportation**
2.	**Date:**	**19TH JULY, 2010**
3.	**Title:**	**RECEIPT OF PETITION**
4.	**Directorate:**	**Chief Executive's**

5. Summary

The purpose of this report is to inform the Cabinet Member of the receipt of the following petition:-

Road traffic noise pollution on Westfield Road, Brampton Bierlow, S63 6LS

6. Recommendation:-

That the Cabinet Member:-

- **(i)** **notes that the petition will formally be received at Council on 28th July, 2010.**
- **(ii)** **receives the petition and refers it to the appropriate Director of Service to investigate the matter raised in the petition and requests that a report be submitted to a future meeting of the appropriate Cabinet Member.**

7. Proposals and Details

The following petition has been received:-

From 17 residents on Cooper Close, Brampton Bierlow, "for traffic calming on Westfield Road which causes considerable amount of noise/pollution".

8. Finance

Costs associated with any proposed works and pressure on already stretched budgets.

9. Risks and Uncertainties

Failure to meet customer expectations

10. Policy and Performance Agenda Implications

Safe: improvements in road safety is a key theme of the South Yorkshire 2nd Local Transport Plan.

11. Background Papers and Consultation

A copy of the petition will be available at the meeting.

Contact Name : Janet Cromack, Senior Democratic Services Officer
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ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS

1.	**Meeting:**	**Economic Development, Planning and Transportation Services Matters**
2.	**Date:**	**19 July 2010**
3.	**Title:**	**Directional Signing Policies**
4.	**Programme Area:**	**Economic and Development Services**

5. Summary

To seek authority to update the existing policy and procedure for Tourist signing and to implement new codes of practice and policies for 3rd Party signing and Temporary event signing.

6. Recommendations

Cabinet Member resolves that:

i) **Tourist, 3rd Party and Temporary direction signing policies are adopted as shown in appendicies (i) to (iii)**

Proposals and Details

Background

The Council is receiving more requests from the public and private sector to install signs that fall into the categories of Tourist, 3rd Party and Temporary directional signing. It is therefore considered that policies are required for each of these areas to establish procedures on who, how and what such requests are to progressed. The Tourist signing policy and procedure, was last updated in 2007, since that time leading organisations and advisory bodies have changed. Currently there are no policies for 3rd Party sign requests or Temporary sign requests.

Information

Signs are a visual means of conveying information to a driver relating to the highway on which he or she is traveling, and should promote the safe and efficient use of the highway. The information has to be seen, read, understood and acted upon in a short period of time and so must be presented in a clear and concise manner. Careful provision of prescribed signs can make a considerable contribution to the safe and efficient operation of the highway network.

The Council receives many requests for signing to various types of premises and this is why new and updated policies are required in order to advise applicants on the required criteria, and efficenciently manage the number of sign assembles within the highway. Without these policies in place applications may be answered inconsistently, which could potentially lead to an increase of such signs in the highway could be distracting to drivers and would add to street clutter. Furthermore, sign posts located in the footway potentially cause problems for pedestrians in general but more specifically for wheelchair users and people with visual impairments.

The Transportation Unit has therefore updated and developed three polices to deal with Tourist, 3rd Party and Temporary event signing. All three are key forms of direction signage for either large numbers of vehicles or drivers that are unfamiliar to an area and thus require a consistent, clear and concise strategy.
Please see:-

- Appendix (i) Tourist Signing Policy and (ia) Design examples of Tourist signs.
- Appendix (ii) 3rd Party Signing Policy and (iia) Design examples of 3rd Party signs.
- Appendix (iii) Temporary Signing Policy and (iiia) Design examples of Temporary Event signs.

Each of the policies attached establishes the procedures and criteria to be adopted by the Council to deal with the applications for the various traffic signs specified above. Each policy has been designed to provide continuity between each document in their appearance and layout of information, whilst the previous Tourist signing policy has been updated to meet current DfT standards.

The current pricing structure doesn't reflect the risk of non recovery of certain costs associated with design which has a potential adverse implication on revenue budgets as these requests are increasing in frequency in all three areas it seems only logical to recharge our time to the requesters, like so many other councils. The aim is to tie together all three forms of signage request into standard pricing packages, in order to give consistent advice to the public when a request is made.

TOURIST & 3rd PARTY DIRECTION SIGN COSTS

Initial application assessment fee - £125 non – refundable
Detailed design initial fee - £400 non – refundable
The full costs of both the design and implementation of the signing scheme are to be paid before manufacture, commuted sums for the removal of the signs should the establishment cease to exist are included within the full cost.

*It should be noted that the Council will deduct the detailed design fee of £400 from the total final scheme cost.

TEMPORARY DIRECTION SIGN COSTS

The various types of permits are shown in the table below along with the appropriate fee.

Type of sign required	Maximum number of signs	Assessment Fee
Events	10	£75
	Over 10	£150

Type of sign required	Time scale	Assessment Fee
New development	Initial 6 months	£150
Re-application	6 month extension	£150

NOTES

- Event organisers who request temporary signs through road user organisations such as the AA and RAC will not be charged.
- The cost for the provision of temporary signs is to be agreed between the applicant and the relevant signing contractor.

7. Finance

At present, without policies for 3rd Party and Temporary directional signage there's no consistent procedure for recharging the costs of signage to the requestee. This may have led to under recovery of costs and added to the burden on existing revenue budgets. The adoption of the revised and new policies will ensure that this no longer occurs.

8. Risks and Uncertainties

Should the policies not be adopted there will be potential ongoing implementations on the councils' revenue budgets.

9. Policy and Performance Agenda Implication

None

10. Background Papers and Consultation

- Providing Traffic Signs to Tourist Destinations – Policy and Procedures 2007 (RMBC)
- The Design and use of Directional Informatory Signs – Local Transport Note 1/94 (DfT)
- The Traffic Signs Regulations and General Directions 2002
- Traffic Signs Manual Chapter 7 – The Design of Traffic Signs 1997
- Provision of Temporary Traffic Signs To Special Events - Network Management Advisory Leaflet May 93 (DfT)
- Design Manual for Roads and Bridges - Volume 8 Traffic signs and Lighting – Section 2 Traffic Signs and Road Markings Part 3 TA 93/04 – GUIDANCE FOR TOURIST SIGNING – GENERAL INTRODUCTION
- Design Manual for Roads and Bridges - Volume 8 – Section 2 - Part 4 TD52/04 –TOURIST SIGNING – TRUNK ROADS
- Design Manual for Roads and Bridges - Volume 8 – Section 2 - Part 5 TA 94/04 – GUIDANCE FOR TOURIST SIGNING – LOCAL ROADS
- Design Manual for Roads and Bridges - Volume 8 – Section 2 - Part 6 TA 53/05 – TRAFFIC SIGNS TO RETAIL DESTINATIONS AND EXHIBITION CENTRES IN ENGLAND AND WALES – TRUNK ROADS
- Local Authorities (Transport Charges) Regulations 1998
- The Temporary Traffic Signs (Prescribed Bodies) (England and Wales) Regulations 1998

Contact Name: *Richard Pardy, Assistant Engineer, Ext. 22959, Richard.pardy@rotherham.gov.uk*

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVIDING TRAFFIC SIGNS TO TOURIST DESTINATIONS

CODE OF PRACTICE AND POLICY

CONTACT

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May 2010

CONTENTS

1. INTRODUCTION

This document outlines the policies and procedures adopted by Rotherham Metropolitan Borough Council to deal with applications for traffic signing to all tourist attractions and services in the Borough area following the guidance set out in TA 93/04 Traffic Signs to Tourist Attractions and Facilities in England – Guidance for Tourist Signing – General Introduction and TA94/04 Traffic Signs to Tourist Attractions and Facilities in England – Guidance for Tourist Signing – Local Roads.

This policy is intended to be a manageable strategy for providing traffic signs which meets the needs and requirements of the Tourism Partnerships, the operators of quality tourist establishments in the Borough and the tourists themselves. It is also intended to help operators of tourist facilities to quickly decide for themselves whether their establishment might qualify for tourist signing before any costs are incurred.

2. PURPOSE OF TOURIST SIGNS

White on Brown tourist signs are part of the family of directional signs. Their purpose is to guide visitors to a pre-selected destination along the most appropriate route at the latter stages of their journey, particularly where destinations are difficult to find. Like any form of Traffic Signing, Tourist signs are only an aid to safe and efficient navigation, which complement, but cannot replace, pre-planning material such as maps and atlases. The signs are **not** intended to provide advertisements for individual tourist establishments nor are they part of the Council's promotion of the tourist industry in general.

3. APPLYING FOR TOURIST SIGNS

Applications for tourist signs on non Trunk and non Motorway Roads in Rotherham are made to Rotherham Metropolitan Borough Council. The procedure is very straightforward. Applicants will be asked to answer a few questions about their tourist establishment and assessed for eligibility using the current criteria contained in this policy document. When the assessment is complete, the Council will write to the applicant to confirm whether their application has been successful or unsuccessful. Replies to unsuccessful applicants will give reasons for the decision whilst successful applicants will be given details about how to further their application.

NOTE:

Applications for tourist signs on **motorways and trunk roads** must be made to:-
Highway Agency
Lateral
8 City Walk
Leeds
LS11 9AT

4. DEFINITION OF A TOURIST DESTINATION

A tourist destination means a permanently established attraction or facility which attracts or is used by visitors to an area and is open to the public without prior booking during its normal opening hours. There are two types of tourist establishment which may be eligible for tourist signing.

- **TOURIST ATTRACTIONS**

These include for example visitor centres, theme parks, historic buildings, museums, zoo's, parks and gardens, natural attractions (such as nature reserves, beaches and view points) areas of special interest, country tours or tourist routes, sports centres, concert venues, theatres and cinemas.

- **TOURIST FACILITIES**

These include for example hotels, guesthouses, bed and breakfast establishments, public houses, restaurants, holiday parks, touring and camping parks, picnic sites and tourist information centres.

The above is not an exhaustive list of the types of establishments in each category.

5. ELIGIBILITY FOR TOURISM SIGNING

GENERAL CRITERIA

To be eligible for tourist signing an establishment must:-

- Be open for at least 150 days per year or host ten eligible events per year – an example of an eligible event is a horse racing meeting at a racecourse.
- Be something you would not reasonably expect to find in that location.
- Show evidence of promoting to the tourism market and promoting the attraction or facility beyond the local area – this could include promotional brochures, details of where they have been distributed, advertisements published in tourist guides, the media or T.V. and radio advertising.
- Meet all statutory requirements e.g. planning permission, fire, health and hygiene.
- Provide adequate off-street parking for visitors either on site or in appropriate car parks nearby with the written permission of the owner.
- Be recognised by the Tourism Partnerships or the Local Authority as a tourist destination or establishment and take part in the approved Quality Assurance schemes, such as Visitor Attraction Quality Accreditation Scheme (VAQAS), Accommodation Establishments must undertake the Quality Assessment annually.

- Further guidance on recommended requirements needed to support an application is provided in Appendix ‘A’.

- Further guidance on Quality Assurance schemes and representative bodies is provided in Appendix ‘B’.

NOTE:

Eligibility does **not** confer automatic entitlement to tourist signs. Decisions on signing individual establishments will depend on local circumstances, including the number of other similar establishments in the area.

6. CRITERIA FOR IMPLEMENTING TOURIST SIGNING

To avoid the unnecessary provision of traffic signs (or ‘sign clutter’) which can detract from other more important road signs, the Council has adopted the following criteria for implementing tourist signing on roads in the Borough of Rotherham.

- Tourist signing will only be provided where the highway authority (the Council) is satisfied that the local road network to and from the establishment is capable of safely accommodating the level of traffic and the type of vehicle that the establishment may generate.

- A tourist establishment will only be signed from the nearest ‘A’ or ‘B’ classified road unless there is good reason to do otherwise on traffic flow or road safety grounds. As an example, an establishment on an unclassified road adjoining the A630 would only be signed from the ‘A’ road. If an establishment is accessible from more than one direction, each route may be signed if it is useful on traffic management grounds. Where an establishment is signed from a motorway or trunk road, continuity signing to the establishment will be provided on the local road network.

- A tourist attraction in a village will be signed from the most appropriate classified roads if the existing village direction signs do not adequately direct traffic to it or, if it is difficult to find.

- Town and Village boundary signs which allow the inclusion of a brown panel displaying tourist symbols may be used at the main entry points into a village in association with the village name. The maximum number of tourist symbols is three. Wherever possible these signs will be used in preference to signing individual ‘facilities’ but will be supported by continuity signing within the community(which may be pedestrian signing from a car park). However, it is recommended that road users should be directed to a tourist information point or a tourist information centre.

- By-passed community signs are usually associated with a break during a journey rather than being a final destination sought by a driver and are intended to provided information about local tourist attractions and the availability of tourist information, bypassed community signs and local service signs, should only be used to direct road users to small towns or villages with a population of less than 10,000, this is because larger towns and cities can be expected to provide a full range of facilities and existing direction signs are already likely to have been provided.

- In the intrest of road safety and to avoid excessive environmental intrusion the total number of destinations located on a sign should be no more than 6, however for Tourist signs the maximum number of destinations at one location should be no more than 3 - 4 dependent on the individual signing locations and speed of the road. Tourist destinations frequently consist of two or more words and additional information such as symbols, as such the information has to be seen, read, understood and acted upon in a short period of time and so has to be reduced. Where there are more than 3 applications received for signing at a particular location, priority will be given to signing the establishments which attract the most tourists. The maximum number of tourist destinations may be reduced if tourist signs accommodate additional information and non tourist signs will always take priority, where signing at an individual location needs to be reduced for environmental or road safety reasons. .

- For 'attractions' in urban areas such as town centres, pedestrian signing from bus and train stations is more appropriate than vehicle signing, particularly where car or coach access to the attraction is discouraged for environmental or safety reasons. Signs other than generic signs to tourist 'facilities' in urban areas are unnecessary and will not usually be provided.

- In conservation areas or areas of outstanding beauty the environmental impact of traffic signs can be significant. In these areas it is important that the environmental impact of new signs is minimised, as far as is consistent with their intended purpose.

7. <u>TOURIST SIGN APPLICATION PROCCESS AND COSTS</u>

PROCESSING AN APPLICATION

Applicants are liable for all costs relating to tourist signs. (It is strongly recommended that an application for tourist signing is not made until the criteria guidelines and requirements in this document have been met). The cost of determining an application is £125.00 + VAT and takes around 4 weeks to complete. This fee is payable in advance and will not be reimbursed if the application is unsuccessful. Where applications are refused, a written explanation will be given detailing the reasons for refusal. Processing an application includes:-

ASSESSMENT AND SIGN INSTALLATION TIMETABLE

STAGE	ACTIVITY	ESTIMATED TIMESCALE PER STAGE
1	**Assessment** Application assessed against criteria If approved notify Client and proceed to detailed design otherwise advise Client that request refused stating reasons why.	4 weeks
2.	**Detailed Design** Carryout detailed design, obtain price for works and then submit scheme to Client for approval. On receipt of the signed Confirmation Of Acceptance Agreement and funds to cover the cost of the scheme proceed to Construction, otherwise abandon scheme.	6 weeks
3	**Construction** Scheme issued to Streetpride for construction.	16 weeks
4	**Completion** When scheme complete and all snagging issues resolved, issue invoice to Client for payment.	4 weeks
	Total Time	29 weeks

A timetable showing the main stages in processing an application is shown below. The applicant should note the following;

- They will be expected to pay a non-refundable fee of £125 for assessment of their application.
- Detailed design initial fee - £400 payable at the start of stage 2 before detailed design commences, this cost is non-refundable.
- They will be expected to pay full costs of both the design and works required in providing the signs*, which will be provided to the applicant before stage 3 commences.
- The Council reserves the right at any time, to remove, reposition or alter the design of the signs if it considers it necessary in the interests of road safety, traffic management or to accommodate other traffic signs.
- They are liable for all costs resulting from damage or theft to the signs and their repositioning if required by the Highway Authority.
- A commuted sum will be included in the price to cover the removal of signs should the establishment cease to qualify for signing or is permanently closed.

*It should be noted that the Council will deduct the initial detailed design fee payment of £400 from the outstanding final scheme cost.

RENEWAL OF EXISTING CONSENTS AFTER TEN YEARS

The signs will be under a ten year review period. Any alteration or removal of signs caused by the closure or relocation of an attraction within this period would be covered by the initial payments. At the end of the ten year period the cycle would repeat itself. Renewal of consent will be charged to the current operator of a tourist establishment at the prevailing rate charged for processing an application.

Assessment of Quality Standards in the Visitor Quality Assurance Scheme and Accommodation Quality Assessment Schemes either AA, QIT, Camping and Caravan Club.

POINTS TO NOTE

Where an establishment qualifies for tourist signing any existing approved signs on the highway directing traffic or pedestrians to it will be removed by the Council. Similarly all advertising or non-approved direction signs on the highway should be removed by the applicant. The erection of advertising or other non-approved material on the highway where tourism signing has been provided shall render the establishment ineligible and the tourist signing will be removed.

Where additions to composite signs (signs showing more than one tourist destination) are needed or signing to a tourist establishment is included on general direction signing, an applicant will be required to pay for the provision of a complete new sign assembly.

8. APPENDIX ‘A’ RECOMMENDED REQUIREMENTS FOR TOURIST ESTABLISHMENTS

ESTABLISHMENT	RECOMMENDED REQUIREMENTS
Hotels, Serviced Accommodation	Only assessed, graded and serviced accommodation will be considered for tourism signs. Examples of grading schemes are given in Appendix B. Applicants will need to provide written confirmation of their grading and a copy of their current annual assessment certificate.
Chalets, Caravan and Camp Sites	Sites should have at least 20 services pitches for casual overnight use. Only licensed, inspected and graded sites will be considered for tourism signs. Examples of grading schemes are given in Appendix B. Applicants will need to provide written confirmation of their grading and a copy of their current membership certificate. YHA Youth Hostels will be granted tourism signing.
Public Houses	Hot and cold meals and not just bar snacks must be served at least at lunchtime and evenings in a dedicated dining area. A childrens' certificate is required to allow children to accompany their parents. Where overnight accommodation is provided only assessed, graded and serviced accommodation will be considered for tourism signs. Applicants will need to provide written confirmation of their grading and a copy of their current annual assessment certificate.
Restaurants and Cafes	Should be open when tourists are most likely to be visiting the area and customers should be able to obtain a meal without pre-booking.
Leisure and Sports Facilities	Must be open to the public and not fully dependant on prior booking and be open for at least 6 hours every day. Establishments holding more than ten major events per annum may also be considered for tourism signs.
Theatres and Cinemas	Open to the public and not fully dependant on prior booking.
Retail	Need to provide amenities or features specifically aimed at tourists (e.g. craft centres where craft skills or product manufacture are demonstrated). Exceptions may be made in rural areas in recognition of tourism’s importance to the rural economy.
Tourist Trails, Leisure Drives and Cycle Routes	Need to be free of charge with access available at all times.

Note: This list is not exhaustive and is only intended to give guidance on the standards expected of Tourist establishments.

Where appropriate there should be access, washing, toilet and other arrangements for families with children and for the disabled to ensure these people can make full use of the establishment. Appropriate arrangements are to provide an access statement identifying access facilities including some of the following if available

Wheelchair access ramps	Lifts
Toilets (including toilets for the disabled)	Internal signs
Telephones	Baby changing rooms
Rest Rooms/areas	Baby feeding areas
Washing and hand drying	Aids for blind and deaf people
Hand rails	Disabled parking*

- usually 5% of total on site parking spaces (minimum of 2 spaces for smaller establishments)

If you require information on the National Accessible Scheme and the Council's Access Guide for tourism facilities please contact the Tourism Service:-

Rotherham visitor centre
40 Bridgegate
Rotherham
S60 1PO

Where suitable arrangements are not provided, reasons must be given.

Where signs are provided, consideration will be given to removing them if the establishment fails to meet any of the recommended requirements or is no longer part of a Quality Assessment scheme.

DIFFICULT TO FIND DESTINATIONS

For many tourist 'facilities' in urban areas it must also be demonstrated that there is a need for signing due to particular difficulty finding its location or that the building has some historic or other significance attached to it. The general assumption is against providing signs (other than generic signs e.g. 'hotels') in built up urban areas, especially where tourists would reasonably expect to find particular services. An exception to this is any signing implemented by the Council as part of a comprehensive strategy in pursuance of its Public Realm Strategy Design Code/Local Development Framework.

GENERAL CRITERIA

- Lack of clear signing in the general area in which the establishment is located.
- Presence of complex junctions which have to be negotiated to reach the establishment.
- Lack of visibility of the establishment from any distance.
- Presence of any other factors which would tend to mislead or confuse those seeking the establishment.

9. APPENDIX 'B' **EXAMPLES OF QUALITY ASSURANCE SCHEMES AND REPRESENTATIVE BODIES**

FACILITY/ATTRACTION	**EXAMPLE Q.A. SCHEME OR REPRESENTATIVE BODY**
Theme Park	International Theme Park Association.
Historic Properties and Castles	National Trust, English Heritage.
Parks and Gardens	Royal Horticultural Society.
Museums and Ancient Monuments	Museum Council, English Heritage.
Historic Churches	Quality in Tourism. Heritage Inspired South Yorkshire
Areas of Special Interest	English Nature, Civic Society.
Picnic Area and View Points	Tidy Britain Awards.
Hotels, Serviced Accommodation, Public Houses, Restaurants, Cafes	QIT, AA, grading schemes, Brewers Licensed Retailers Association, Tied Pub Owners, Regional Tourist Board Welcome Host Initiative. Inclusion in recognised food guide.
Chalets, Caravans and Camp Sites	QIT Standards for Self Catering. Accommodation, Graded Holiday Parks, Camping and Caravan Club.
Leisure and Sports Facilities	Sports Council Membership.
Theatres and Cinemas	Arts Council Membership.
Retail	Chamber of Commerce
Tourist Trails, Leisure Drives, and Cycle Routes	Enjoy England, Visit England, Trans Pennine trail, Sustrans.

Note: This list is not exhaustive and is intended to give guidance on the standards expected of Tourist facilities and attractions. It is not a comprehensive list of acceptable Q.A. Schemes and representative bodies. Further information about appropriate Quality Assurance schemes can be obtained by contacting:-

Accommodation & Spas	**Visitor Attractions**	**Visitor Attractions Quality Assurance Service (VAQAS)**
Quality in Tourism, Security House Alexandra Way Ashchurch, Tewkesbury, Gloucestershire GL20 8NB Tel: 0845 300 6996 Email: qualityintourism@gslglobal.com Web:www.qualityintourism.com	VisitBritain Thames Tower Blacks Road London W6 9EL Tel: 020 8846 9000 Email:visitbritain.org Web:www.enjoyengl and.com	VAQAS VisitBritain Thames Tower Blacks Road London W6 9EL Tel: 020 8846 9000 Email: vaqas@eetb.org.uk Web: http://www.tourismtrade.org.uk/quality/assessmentstandards/VAQAS/default.asp

PLANNING AND REGENERATION SERVICE
BAILEY HOUSE
RAWMARSH ROAD
ROTHERHAM S60 1TD

PAUL WOODCOCK – DIRECTOR OF SERVICE

APPLICATION FORM FOR TRAFFIC SIGNING TO TOURIST ESTABLISHMENTS

DETAILS OF OPERATOR

Name and address of operator: ……………………………………………..
……………………………………………..
……………………………………………..

Contact name and telephone number: ……………………tel: …………………….

DETAILS OF TOURIST ESTABLISHMENT

(If different to above)

Name and address of tourist establishment: ………………………………………………
………………………………………………
………………………………………………

Contact name and telephone number: …………………. tel: ……………………..

With regard to the destination to be signed please indicate the text you wish to be considered for the sign(s) and a description of what activities take place at the destination.

....

....

....

....

What is the main purpose of the tourist establishment? (Please provide copies of any promotional information).

…………………………………………………………………………………………………
…………………………………………………………………………………………………
…………………………………………………………………………………………………

Opening times.

Number of days open per year ....

Opening hours ....

Is pre-booking required YES/NO

Visitor Numbers.

Please give visitor numbers for last three years 20_ _:..........................
20_ _:..........................
20_ _:..........................

Promotional/directional Information.

Please give details below of how you promote your business. (eg. where do you advertise, do you produce promotional material and where do you distribute it? A copy all promotional literature and some examples of advertisements must be included).

....

....

....

....

....

....

Accreditation

Please give details of membership to any representative bodies and relevant quality assurance schemes, If you are a 'graded' establishment, please attach copies of documentation, e.g. assessment certificates.

....

....

....

....

....

How many on site parking spaces are available for the visiting public.

Number of spaces for cars ....

Number of spaces for coaches ....

Number of dedicated disabled spaces ....

If none please give details of parking facilities available for visitors.

....

....

....

....

I hereby declare that the above information is correct and understand that any false information will disqualify my application.

Print name ....

Signed ....

Date ....

PLEASE RETURN THE COMPLETED FORM, CHEQUE AND ALL SUPPORTING DOCUMENTS TO:

Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rawmarsh Road
Rotherham S60 1TD

Note: all applications must be accompanied by a cheque for £125 payable to Rotherham Metropolitan Borough Council any applications not including this fee will be returned. The application fee will not prejudice decisions and unsuccessful applications will not receive a refund.

11. APPENDIX 'D'

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVISION OF TOURIST DIRECTION SIGNS

CONFIRMATION ACCEPTANCE TO DEVELOP SCHEME TO DETAILED DESIGN

Signs to:- ____

I accept the proposal that Rotherham Metropolitan Borough Council have initially developed and I agree to pay £400, which allows the detailed design of the scheme to be completed to assist in the final scheme cost.

Please note that payment will be required before the design is commenced.

To be completed by the applicant

I am in agreement with the condition stated above.

Signed ______________________________ Date ______________________________

Name (Please print) ______________________________

An Authorised Signatory of ______________________________

Address ______________________________

____

____

Signed ______________________________ Date ______________________________

On behalf of:- Rotherham Metropolitan Borough Council

Please return to:-

Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rotherham, S60 1TD

12. APPENDIX ‘E’

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVISION OF TOURIST DIRECTION SIGNS

CONFIRMATION OF ACCEPTANCE

Signs to:- ____

Rotherham Metropolitan Borough Council is prepared to authorise and thereafter to erect traffic signs indicating the direction to at the location(s) shown on the attached plans.

I agree with the estimated cost of £ which includes design, manufacture, erection, minor maintenance, commuted sum and administration costs.

The signs will remain the property of RMBC as Highway Authority, and the Council has and reserves the right to remove, reposition or alter the design of the signs if it considers this necessary in the interest of road safety, traffic management or to accommodate other traffic signs at or in the vicinity of those locations. If the destination ceases to meet the criteria under which the signs were justified then I understand the signs will be removed.

Please note that payment will be required before work is commenced.

To be completed by the applicant

I am in agreement with the condition stated above.

Signed ______________________________ Date ______________________________

Name (Please print) ____

An Authorised Signatory of ____

Address ____

____

____

Signed ______________________________ Date ______________________________

On behalf of:- Rotherham Metropolitan Borough Council

POINTS TO NOTE

If the signs require replacement or repositioning during or after their expected life of ten years owing to theft, deterioration, or accident damage, then I will be responsible for the full cost of replacement if I wish the signs to remain. Should the replacement not be financed, all of the signing will be subject to removal.

Please return to:-
Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rotherham, S60 1TD

Tourist direction sign examples

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVIDING TRAFFIC SIGNS TO THIRD PARTY DESTINATIONS

CODE OF PRACTICE AND POLICY

CONTACT

Transportation Unit

Planning and Regeneration Service
Rotherham Metropolitan Borough Council
Bailey House
Rawmarsh Road
Rotherham S60 1TD

Tel (01709) 822959
e-mail: Transportation@rotherham.gov.uk

May 2010

CONTENTS

1. INTRODUCTION

This document sets out the Council's policy for the provision of permanent direction signs for third parties that would not normally be provided by the Highway Authority. It does not cover signs for tourists or temporary housing and events signs.

This policy is intended to be a manageable strategy for providing traffic signs which meets the needs and requirements the Highway Authority in assisting the operators of quality establishments in the Borough and their patrons. It is also intended to help third parties to quickly decide for themselves whether their establishment might qualify for destination signing before any costs are incurred.

2. PURPOSE OF DIRECTION SIGNS

Direction signing is used to guide drivers to their destinations by the most appropriate routes. The approach adopted in the UK is first to guide traffic towards a general destination then, at the appropriate point, to direct it to more specific areas and finally to local destinations. Signing, therefore, becomes increasingly specific, moving down a hierarchy of destinations, as decision points are reached.

Generally, all traffic signs used on the highway must conform to the Traffic Signs Regulations and General Directions (TSRGD) 2002, which is periodically updated, but the Secretary of State or the Department of Transport (DfT) in appropriate circumstances can individually authorise special signs.

Signs, which do not conform to the appropriate regulations, or are unauthorised signs or advertisements, may distract the attention of road–users to the detriment of road safety. They might also be held by a court to be unlawful obstructions of the highway.

3. ELIGIBILITY FOR 3rd PARTY DIRECTION SIGNING

The Council as the Highway Authority must ensure that signs in their area conform/comply with the above and must protect the road user against the proliferation of unnecessary signs. It has, therefore, established the following criteria to assess applications for signs to destinations:

GENERAL CRITERIA

1. It attracts a significant volume of traffic, giving rise to congestion and problems of road safety;
2. Attracts visitors from outside the area;
3. It is difficult to find;
4. Adequate off-street car parking is available for visitors;
5. There is sufficient directional information provided for visitors wishing to travel to the destination? (leaflets, website, etc);
6. It provides a service for the community;

This information should be detailed on the application form together with any other information that the applicant feels supports their case

NOTE:

Eligibility does **not** confer automatic entitlement to direction signs. Decisions on signing individual establishments will depend on local circumstances, including the number of other similar establishments in the area.

4. CRITERIA FOR IMPLEMENTING 3rd PARTY DIRECTION SIGNING

To avoid the unnecessary provision of traffic signs (or 'sign clutter') which can detract from other more important road signs, the Council has adopted the following criteria for implementing Third party direction signs signing on roads in the Borough of Rotherham.

- Signing will only be provided where the highway authority (the Council) is satisfied that the local road network to and from the establishment is capable of safely accommodating the level of traffic and the type of vehicle that the establishment may generate.

- An establishment will only be signed from the nearest 'A' or 'B' classified road unless there is good reason to do otherwise on traffic flow or road safety grounds. As an example, an establishment on an unclassified road adjoining the A630 would only be signed from the 'A' road. If an establishment is accessible from more than one direction, each route may be signed if it is useful on traffic management grounds. Where an establishment is signed from a motorway or trunk road, continuity signing to the establishment will be provided on the local road network.

5. 3rd PARTY DIRECTION SIGN APPLICATION PROCCESS AND COSTS

PROCESSING AN APPLICATION

Applicants are liable for all costs relating to tourist signs. (It is strongly recommended that an application for signing is not made until the criteria guidelines and requirements in this document have been met). The cost of determining an application is £125.00 +

VAT and takes around 4 weeks to complete. This fee is payable in advance and will not be reimbursed if the application is unsuccessful. Where applications are refused, a written explanation will be given detailing the reasons for refusal. Processing an application includes:-

ASSESSMENT AND SIGN INSTALLATION TIMETABLE

STAGE	ACTIVITY	ESTIMATED TIMESCALE PER STAGE
1	**Assessment** Application assessed against criteria If approved notify Client and proceed to detailed design otherwise advise Client that request refused stating reasons why.	4 weeks
2.	**Detailed Design** Carryout detailed design, obtain price for works and then submit scheme to Client for approval. On receipt of the signed Confirmation Of Acceptance Agreement and fund to cover the cost of the scheme proceed to Construction, otherwise abandon scheme.	8 weeks
3	**Construction** Scheme issued to Street Pride for construction.	16 weeks
4	**Completion** When scheme complete and all snagging issues resolved, issue invoice to Client for payment.	4 weeks
	Total Time	32 weeks

A timetable showing the main stages in processing an application is shown below. The applicant should note the following;

- They will be expected to pay a non-refundable fee of £125 for assessment of their application.
- Detailed design initial fee - £400 payable at the start of stage 2 before detailed design commences, this cost is non-refundable
- They will be expected to pay full costs of both the design and works required in providing the signs*, which will be provided to the applicant before stage 3 commences
- The Council reserves the right at any time, to remove, reposition or alter the design of the signs if it considers it necessary in the interests of road safety, traffic management or to accommodate other traffic signs.

- They are liable for all costs resulting from damage or theft to the signs and their repositioning if required by the Highway Authority.
- A commuted sum will be included in the price to cover the removal of signs should the establishment cease to qualify for signing or is permanently closed.

*It should be noted that the Council will deduct the initial detailed design fee payment of £400 from the outstanding final scheme cost.

RENEWAL OF EXISTING CONSENTS AFTER TEN YEARS

The signs will be under a ten year review period. Any alteration or removal of signs caused by the closure or relocation of the establishment within this period would be covered by the initial payments. At the end of the ten year period the cycle would repeat itself. Renewal of consent will be charged to the current operator of the establishment at the prevailing rate charged for processing an application.

POINTS TO NOTE

Where an establishment qualifies for 3rd party any existing approved signs on the highway directing traffic or pedestrians to it will be removed by the Council. Similarly all advertising or non-approved direction signs on the highway should be removed by the applicant. The erection of advertising or other non-approved material on the highway where tourism signing has been provided shall render the establishment ineligible and the 3rd party signing will be removed.

6. APPENDIX ‘A’

PLANNING AND REGENERATION SERVICE

BAILEY HOUSE

RAWMARSH ROAD
ROTHERHAM S60 1TD

PAUL WOODCOCK – DIRECTOR OF SERVICE

APPLICATION FOR THIRD PARTY DIRECTION SIGNS

1. ***Name and address of Applicant.***

   Name ....
   Address ....
   ....
   ....
   Post Code ....
   Contact .... Telephone ....
   Fax ....
   E-mail Address
   ....

2. ***With regard to the destination to be signed please indicate the text you wish to be considered for the sign(s) and a description of what activities take place at the destination.***

   ....
   ....
   ....
   ....

3. ***How many on site parking spaces are available for the visiting public.***

   Number of spaces for cars ....
   Number of spaces for coaches ....
   Number of dedicated disabled spaces ....
   If none please give details of parking facilities available for visitors.
   ....
   ....
   ....

4. ***Opening times.***
   Number of days open per year ....
   Opening hours ....
   Is pre-booking required YES/NO

5. ***Period of Occupation.***
   How long has the destination been in existence ....years

6. ***Visitor Numbers.***
   Please give visitor numbers for last three years 20_ _:...........................
   20_ _:...........................
   20_ _:...........................

7. ***Promotional/directional Information.***
   Please give details below of how you promote your business. (eg. where do you advertise, do you produce promotional material and where do you distribute it? A copy all promotional literature and some examples of advertisements must be included).
   ....
   ....
   ....
   ....
   ....
   ....
   ....

8. ***Additional Support Information.***
   Have you any additional information that may assist us in assessing your application.
   ....
   ....
   ....
   ....
   ....
   ....
   ....

I hereby declare that the above information is correct and understand that any false information will disqualify my application.

Print Name ....

Signed ....

Date ....

PLEASE RETURN THE COMPLETED FORM, CHEQUE AND ALL SUPPORTING DOCUMENTS TO:

Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rawmarsh Road
Rotherham S60 1TD

Note: all applications must be accompanied by a cheque for £125 payable to Rotherham Metropolitan Borough Council any applications not including this fee will be returned. The application fee will not prejudice decisions and unsuccessful applications will not receive a refund

APPENDIX 'B'

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVISION OF THIRD PARTY DIRECTION SIGNS

CONFIRMATION ACCEPTANCE TO DEVELOP SCHEME TO DETAILED DESIGN

Signs to:- ____

I accept the proposal that Rotherham Metropolitan Borough Council have initially developed and I agree to pay £400, which allows the detailed design of the scheme to be completed to assist in the final scheme cost.

Please note that payment will be required before the design is commenced.

To be completed by the applicant

I am in agreement with the condition stated above.

Signed ______________________________ Date ______________________________

Name (Please print) ____

An Authorised Signatory of ____

Address ____

____

____

Signed ______________________________ Date ______________________________

On behalf of:- Rotherham Metropolitan Borough Council

Please return to:-
Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rotherham, S60 1TD

APPENDIX 'C'

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

PROVISION OF THIRD PARTY DIRECTION SIGNS

CONFIRMATION OF ACCEPTANCE

Signs to:- ____

Rotherham Metropolitan Borough Council is prepared to authorise and thereafter to erect traffic signs indicating the direction to at the location(s) shown on the attached plans.

I agree with the estimated cost of £ which includes design, manufacture, erection, minor maintenance, commuted sum and administration costs.

The signs will remain the property of RMBC as Highway Authority, and the Council has and reserves the right to remove, reposition or alter the design of the signs if it considers this necessary in the interest of road safety, traffic management or to accommodate other traffic signs at or in the vicinity of those locations. If the destination ceases to meet the criteria under which the signs were justified then I understand the signs will be removed.

If the signs require replacement or repositioning during or after their expected life of ten years owing to theft, deterioration, or accident damage, then I will be responsible for the full cost of replacement if I wish the signs to remain. Should the replacement not be financed, all of the signing will be subject to removal.

Please note that payment will be required before work is commenced.

To be completed by the applicant

I am in agreement with the condition stated above.

Signed ____________________________ Date ______________________________

Name (Please print) ____

An Authorised Signatory of ____

Address ____

____

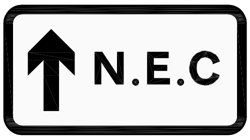
____

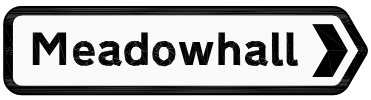
Signed ____________________________ Date ______________________________

On behalf of:- Rotherham Metropolitan Borough Council

Please return to:-
Rotherham Metropolitan Borough Council
Transportation Unit
Bailey House
Rotherham, S60 1TD

3rd Party direction sign examples





ROTHERHAM METROPOLITAN BOROUGH COUNCIL

TEMPORARY SIGNS ON THE PUBLIC HIGHWAY

CODE OF PRACTICE AND POLICY

CONTACT

Transportation Unit
Planning and Regeneration Service
Rotherham Metropolitan Borough Council
Bailey House
Rawmarsh Road
Rotherham S60 1TD

Tel (01709) 822959
e-mail: Transportation@rotherham.gov.uk

May 2010

CONTENTS

1. INTRODUCTION

This document outlines the policies and procedures adopted by Rotherham Metropolitan Borough Council to deal with applications for temporary signs. Approval will be given to organisers (or their agents) of sports meetings, exhibitions or temporary housing developers signs subject to the conditions set out within this document. Organisers should make use of facilities offered by the motoring organisations or approved contractors whenever possible and ensure consistency and compliance with The Traffic Signs Regulations and General Directions 2002.

The onus is on the organisers of the event or site developer to ensure that adequate guidance is given to all people requiring directions, thus minimising the necessity for any temporary signs. **The primary purpose of any sign erected within the highway is to give direction (rather than advertise)** and this criterion will form the basis of any approval. Where organisers / developers have failed to do this the Highway Authority will not consider approval of additional signs

2. CONDITIONS

Temporary direction signs shall only be authorised if significant traffic flows are likely to be generated and cause congestion or safety problems. Temporary signs will not be considered for any event where an adequate system of permanent direction signs to the venue is in existence.

Signing for events shall be kept to a minimum, appropriate to the location and volume of expected visitors, with erection not more than two days before the event and removal by the organisers within two days of the event closing.

Organisers should consider car-parking arrangements where appropriate and shall agree access points with the Highway Authority. The Police do not normally need to be consulted on small local events. However for large events where more extensive signing is required over a wider area, such as a major or national event, that would generate significant traffic flows, consultation between the Police, Highway Authority and other interested parties should be discussed at least four months in advance. The organiser should normally initiate these consultations.

Temporary Signing will be kept to a minimum and signed from the nearest A or B Road unless in exceptional circumstances it is considered by the Highway Authority that additional signs are required. Signing for Housing development sales purposes are not permitted.

The persons(s) responsible for the erection of the temporary signs shall indemnify Rotherham Metropolitan Borough Council (RMBC) against any liability, loss, damage or proceedings arising from the erection, display and removal of the signs, using the attached form. The sign erectors must show proof of operatives' qualifications for erecting signs on the highway and be approved by RMBC. They shall also be responsible for maintaining all temporary signs in a safe manner until their removal from the public highway.

RMBC reserve the right to move or remove signs as it considers necessary and recoup (from organisers or developers) the total cost including any necessary storage for signs which do not comply with this Code of Practice.

Organisers or developers who erect signs on the public highway without prior permission (or when permission has expired) may have those signs removed and may be charged for the removal and storage of said signs, As per the Road Traffic Act 1980 Section 143 - The removal of unauthorised structures on the highway.

3. <u>NOTES FOR GUIDANCE</u>

- The sign face must conform to regulation 53, Section 6 and should also be designed as shown in diagram 2701 and 2701.1 of "The Traffic Signs Regulations and General Direction 2002".

- The legend will normally consist of 1 to 3 words plus a direction arrow or chevron arrow depending on the sign location. The legend shall be black on a yellow background. The reverse must be grey or black.

- Temporary signs shall refer only to the name of the event, facility or development.
- Commercial names, logos, time or dates shall not be permitted.

- The signs shall not exceed 0.30 sq.m. in area and shall be manufactured using coated steel or aluminium.

- Where two signs are to serve the purpose of a double-sided sign they shall be of a similar size and mounted back-to-back.

- The sign shall be maintained at a height of not less than 2.3 metres above ground level measured to the underside of the sign and not closer than 0.5 metres from the edge of the carriageway.

- Any sign, which becomes damaged or unsightly shall be replaced or removed as soon as possible, at the cost of the event organiser or developer.

- Temporary signs may only be fixed to lighting columns or posts supporting direction signs, or to privately owned street furniture or walls (where the owners' consent has been obtained). Street furniture must be protected using a rubber sleeve surrounding the fixing. Under no circumstances shall temporary signs be fixed to any traffic sign assembly containing a triangular, circular or octagonal sign or traffic signal pole.

- The method of fixing shall be of an anti-rotational type and sleeved when attached to steel columns or posts. Plastic tie wraps, wire, chains or string MUST NOT be used.

- Following the Councils assessment of a temporary signing application, the applicant will be informend as to what alterations if any need to be done, the scheme should be re-submitted. There is no additional cast for re-submitting the scheme.

- If or when an application is acceptable you will be contacted by the Council, who will inform you that the application has been successful and the date your signing scheme can be erected from and until what date it can remain in-situ.

- The period for which signs are to remain in–situ is generally no longer than 12 months although this shall be dependent on the time scale for permanent signs to be erected and at the discretion of Highway Authority.

- Signs relating to development sites have a fixed time limit of 6-months. There is a possibility of an extension for a further and final 6 months pending resubmission of the scheme if the stated development is less than 60% complete.

- Approval may be withdrawn at any time at the discretion of the Highway Authority.

4. PROCEDURES

TEMPORARY EVENT SIGNS

A formal application must be submitted in writing a minimum of 4 weeks before the proposed erection date.

With any request the applicant shall submit the following: -

- Location plan, date, duration and type of event.

- Number or persons/vehicles expected to attend.

- Car parking arrangements.

- One copy each of the proposed sign schedules showing sizes, legends and directions, number identification of lighting columns to which signs are to be fixed and a copy of the proposed sign and venue location plan.

- Period over which the signs are required on site.

- Evidence that the organisers will indemnify the Highway Authority against any liability, loss, damage or proceedings arising from erection, display and removal of the temporary signs.

- Confirmation that the signs will be removed after the event.

- Proposed method of fixing.

There is no guarantee that proposals giving less than 4 weeks notice can be considered in time for the event.

TEMPORARY DEVELOPMENTS SIGNS

A formal application must be submitted in writing a minimum of 4 weeks before the proposed erection date.

- With any request the applicant shall submit the following: -

- Location plan, erection date and type of development.

- Number or houses of flats within the development if applicable.

- Number of phases in which the development is being built.

- One copy each of the proposed sign schedules showing sizes, legends and directions, number identification of lighting columns to which signs are to be fixed and a copy of the proposed sign and venue location plan.

- Period over which the signs are required on site.

- Evidence that the organisers will indemnify the Highway Authority against any liability, loss, damage or proceedings arising from erection, display and removal of the temporary signs.

- Confirmation that the signs will be removed by the date specified on the approval correspondence by the council

- Proposed method of fixing.

There is no guarantee that proposals giving less than 4 weeks notice can be considered in time for the start of construction.

6. TEMPORARY DIRECTION SIGN COSTS

The various types of permits are shown in the table below along with the appropriate fee.

Type of sign required	Maximum number of signs	Assessment Fee
Events	10	£75
	Over 10	£150

Type of sign required	Time scale	Assessment Fee
New development	Initial 6 months	£150
Re-application	6 month extension	£150

NOTES

- Registered Charities who organise events will have their assessment fee waivered.
- The cost for the provision of temporary signs is to be agreed between the applicant and the relevant signing contractor.
- All applications must be accompanied by a cheque payable to Rotherham Metropolitan Borough Council any applications not including this fee will be returned.

7. APPENDIX 'A'

ROTHERHAM METROPOLITAN BOROUGH COUNCIL

FORM OF INDEMNITY

TEMPORARY SIGNS ON THE PUBLIC HIGHWAY

IN CONSIDERATION of your permitting us to attach temporarily sign(s) and/or erect apparatus for the site:- …………………………………………………
Location:- ……………………………………………………………………………………..

in the Metropolitan Borough of Rotherham thereinafter called "the apparatus") in the manner and positions(s) and for the period specified in your letter to us dated……………………………(hereinafter called "the accompanying letter").

WE HEREBY UNDERTAKE and AGREE as follows:-

(a) We will attach/erect the apparatus only in the position(s) approved by you and we will not make any alteration in the types or numbers of the apparatus or the position(s) of the apparatus without the prior consent of the Chief Engineer, Transportation Unit (hereinafter called "the Chief Engineer").

(b) The apparatus will be properly and securely attached/erected and thereinafter satisfactorily maintained to the satisfaction of the Chief Engineer.

(c) If any injury or damage whatsoever is caused or done to any highway for the maintenance of which you are responsible or any part thereof or to any apparatus or equipment or any other property real or personal owned by you or under your control in consequence directly or indirectly of the exercise or purported exercise by us of the permission or of anything done as a result thereof we shall be responsible for such injury or damage and at your direction we will either make good the same to the satisfaction of the Chief Engineer or pay to you all costs and expenses (including normal establishment charges) incurred by you in making good the same.

(d) We will be responsible for and will release you from and will indemnify and keep you indemnified from and against all actions proceedings claims costs demands and liabilities whatsoever which may at any time be taken made or incurred by or against you or your officers servants or agents in respect of any injury whether or not resulting in death loss or damage suffered by anyone whomsoever in consequence directly or indirectly of the exercise or purported exercise of the permission or of anything done as a result thereof howsoever caused.

(e) The permission may be withdrawn at any time by you.

(f) Upon the expiration of the period for which the permission is given or upon its earlier determination by you, we will forthwith remove the apparatus and make good any injury or damage arising in consequence of its removal to the satisfaction of the Chief Engineer and if we fail to do so, you shall be entitled to remove the apparatus or to make good such injury or damage and we will pay to you all costs and expenses (including normal establishment charges) incurred by you in doing so.

(g) If required by you we will at our expense maintain a policy of insurance with a limit of liability in the sum of not less than one million pound in respect of any one claim but unlimited as to the number of claims in any one year in some insurance office or repute in respect of our liability to third parties for injury (including death) loss or damage arising from anything done as a result of the permission such policy also containing an indemnity to you in the terms contained in clause (d) hereof and upon demand we will produce the policy of insurance and evidence of payment of the premiums thereof.

(h) We will observe and perform the conditions (if any) specified in the accompanying letter.

To be completed by the applicant I am in agreement with the condition stated above. Signed ______________________ Date __________________________ Name (please print) ____ An Authorised Signatory of _______________________________________ Address ____ ____ ____ Signed _________________________________ Date __________________ On behalf of:- Rotherham Metropolitan Borough Council
Please note that payment will be required before work is commenced.

Please return to:-

Rotherham Metropolitan Borough Council
Transport Unit
Bailey House
Rotherham
S60 1TD

Temporary direction signs examples

ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS

1.	**Meeting:**	**Cabinet Member for Economic Development, Planning & Transportation**
2.	**Date:**	**19th July 2010**
3.	**Title:**	**Rotherham's Local Economic Assessment**
4.	**Programme Area:**	**Environment and Development Services**

5. Summary

To present to the meeting the first draft of Rotherham's Local Economic Assessment (LEA), seek comments on the layout and content of the document and ask for agreement that it be circulated for consultation to the wider Council, the Local Strategic Partnership and other relevant local partners.

6. Recommendations

- **To note the report.**

- **To feedback any comments on the draft LEA.**

- **To agree that the draft LEA is circulated for consultation to all relevant partners and organisations.**

7. Background

The Local Democracy, Economic Development and Construction Bill places a duty on county and unitary councils to prepare an assessment of the economic conditions of their area, one of the key recommendations of the Review of Sub-National Economic Development and Regeneration (SNR). The duty comes into force in April 2010, with authorities expected to have produced their first LEA by 31st March 2011.

In order to deliver sustainable economic growth, a strong and well informed evidence base is needed. Local Economic Assessments will provide a mechanism for bringing existing evidence from a range of partners together within a common economic evidence base. This evidence base will then inform local, sub-regional and regional strategies, ensuring all policy making is based around a full and shared understanding of local economic challenges.

Local Authorities will take account of local business needs as well as the economic well-being of individuals and communities. They will prepare assessments working with different services, such as: economic development; education; planning; transport and culture & leisure.

Progress to date

Staff from EDS and Chief Execs have produced a draft LEA, using the guidance produced by DCLG and the IDeA; this is attached to this report as Appendix 1.

The report has been broken down into a number of sections, mainly in line with the guidance, but with some specifically local issues such as Rotherham Town Centre. The full list of sections is:-

- Spatial context
- Demography
- Employment
- Skills
- Business and Enterprise
- Inclusion
- Land, Buildings and Infrastructure
- Environment
- Rotherham Town Centre

Each section provides the most up to date and relevant data/evidence, predominantly focusing on the current situation, but with some historical figures where appropriate and also future forecasts if they are available. The section ends with a summary setting out the key issues with regard to Rotherham’s economy.

Timescales

If endorsed today, the draft LEA will be circulated for consultation with all relevant local partners over the summer. This consultation will end in early October 2010, and the document revised in light of feedback. This “final” version should be completed by the end of October and will then go to relevant Council and LSP Boards for approval, meaning the final Assessment should be a live document before the end of the calendar year.

Assessments need to be kept up to date and fit for purpose. Annual reviews will be undertaken, with a major revision taking place in 2013 when the data from the 2011 census will be available to refresh and update the evidence base.

8. Finance
To date all work on the LEA has been undertaken by RMBC meaning costs, with the exception of staff time, are negligible.

The LEA will be used to inform future strategies and policies and as such will assist in identifying future priorities for funding within the Borough.

9. Risks and Uncertainties
Currently it is still to be agreed exactly how the work done at a Rotherham level will link to and complement that carried out at the wider Sub-Regional, Regional and City Region levels.

10. Policy and Performance Agenda Implications
The finished LEA will inform a wide range of strategies and policies and as such will have implications for the following strategies and policies:-

- Sustainable Community Strategy
- Economic Plan
- Local Development Framework

11. Background Papers and Consultation

Colleagues in Finance and Chief Execs have been consulted on this report.

Discussions have been held with Sheffield City Council to ensure that there is complementarity between the LEAs for both areas, building on the strong linkages between the economies of the two areas.

The draft Assessment was discussed by SLT in their meeting on 5th July 2010.

A proposed list of Consultees on the draft LEA are attached to this report as Appendix 2

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ROTHERHAM METROPOLITAN BOROUGH COUNCIL

A LOCAL ECONOMIC ASSESSMENT 2010

DRAFT June 2010

Produced by : Neil Rainsforth
Research & Spatial Analysis Officer
Forward Planning

Contents

Executive Summary

This is the first 'new' Local Economic Assessment carried out in Rotherham and complies with the new statutory duty, placed on all local authorities, to produce an assessment of the economic conditions of their area, which came into force in April 2010. This short summary brings together key issues to emerge from the assessment, highlighting the many improvements seen in Rotherham's economic performance over recent years but also focusing on many of the structural weaknesses that still remain in the economy. The recent UK recession (and weak recovery) has impacted badly on Rotherham and this assessment attempts to assess the likely long-term impacts and additional problems which will need to be overcome.

The main body of the document is broken down into several key areas or themes and this summary adopts a similar structure –

Spatial Context
Rotherham's economy cannot be considered in isolation – the performance of the local economy is inextricably linked with the performance across South Yorkshire and the wider Yorkshire & Humber regional economy, which is in turn highly dependant on national (and international) economic conditions. Rotherham is part of the Sheffield City Region and has particularly strong links with Sheffield, not only in geographical terms but also with dense patterns of economic interaction through strong sectoral complementarities, supply chains and labour markets.

Large scale investment and regeneration that followed the closure of the traditional coal and steel related industries in the late 1990's had a strong impact on major structural changes to Rotherham's economy over the last decade. The period saw over 20,000 additional new jobs within the borough but the increase was not spread across all sectors. In 1998 over 27% of employment in Rotherham was in manufacturing with only 14% of jobs within the banking, finance and other services sectors. By 2008 the position had been reversed with only 15.3% of employment within manufacturing (although this remains higher than the national average) and almost 22% in the banking, finance and other services sectors.

The geographical location of jobs in the borough has also changed in this period with newly reclaimed / regenerated areas showing strong growth. Areas in the Dearne Valley (chiefly along Manvers Way / Cortonwood), Bramley /Wickersley (due to Hellaby Industrial Estate expansion & Bramley Lings area), and Dinnington (due to former colliery reclamation / redevelopment) have been the areas driving employment growth over the last decade.

Demography
Rotherham's population had been declining throughout the 1990's in tandem with the decline of its traditional industries, to reach a low point of 247,000 in 2000. However this trend was reversed with job growth beginning to stimulate inward migration and the population has grown by 5,900 since 2000 to reach

252,900 by 2008. In common with the rest of the UK the make-up of the population is ageing with increasing numbers in the older, mainly retired, age groups.

During the 1990's net outward migration was the primary reason for Rotherham's falling population but since 2000 net inward migration (internal and international) has been the main factor. A major factor in the rise in international migrants to Rotherham, and the UK in general, has been the enlargement of the European Union with many workers entering the UK from Eastern Europe since 2004. National Insurance registrations to overseas nationals settling in Rotherham have been over 1,000 in each of the last four years (2005/06 to 2008/09) with over half of worker registrations originating from the EU Accession States. Unfortunately there is no record of how many workers subsequently return home although there is some national evidence that suggests many East European workers have returned since the start of the recession. This could already be happening in Rotherham as in the last two years, too 2008, there as been net outward migration, with natural change becoming the predominant reason for population growth.

Looking forward Rotherham's population is expected to continue to steadily increase, although slower than the national rate, with the largest increases expected in the older age groups. The working age population is expected to increase only slowly, although increasing retirement ages to be phased in over the coming years will have an impact upon the size of the workforce.

Employment
Rotherham has made great strides in increasing employment over the last 10-15 years with the employment rate rising from the 65%-66% range during the mid-1990's to reach over 74% in 2004/05, close to the national average. This rate has now fallen back to around 70% with the gap to the national average widening again, particularly over the last 18 months due to the impact of the recession. The female employment rate in Rotherham is closer to the national average than for men, but women are far more likely to be working part-time than men.

Unemployment has shown a similar pattern with a strong improvement up to 2005 but jumping from 5.8% in 2008 to 9.1% by 2009 as the recession impacted. Numbers claiming Job Seekers Allowance have increased substantially in the last two years to just over 9,000 at the beginning of 2010; the claimant count rate has risen more quickly in Rotherham and the rest of South Yorkshire compared to the regional and national rates of increase - possibly due to the heavier reliance on manufacturing (a sector particularly hard hit) for employment in the sub-region.

Average earnings in Rotherham, both workplace and residence based, compare poorly with the national average with annual workplace earnings consistently averaging around 90% of the UK average in most years (but around 97% of the regional average). This is partly a reflection of the types of occupations of those in employment in Rotherham with a higher proportion employed within process, plant & machine operatives and elementary occupations, traditionally lower skilled / lower paid, compared to nationally. Similarly there is a lower proportion employed within the managerial and professional occupations, traditionally higher skilled / higher paid, compared to nationally or regionally.

Latest employment projections for Rotherham show no significant improvement until 2011 and at a very low rate of increase, with the numbers employed within the borough not predicted to reach pre-recession levels until around 2020. In the longer-term job losses in the manufacturing sector will continue, particularly in the lower skilled / low value basic manufacturing sectors, with increases expected within the Financial and Business Services sector. These projections are based on ‘policy-off’ expectations – i.e. on a pure trend basis given the sectoral make-up of the local economy. A ‘policy-on’ scenario where Rotherham attracted additional investment would boost the employment level above this, for example through additional EU funding. However the level of any future large-scale investment is unknown, but given the current tight financial constraints any public investment is likely to be much more modest in nature than in recent years. It will therefore become increasingly important to attract higher levels of private investment into Rotherham.

Skills

The recent recession has highlighted the pressure on ‘old’ labour intensive / elementary occupations, which are forecast to continue their decline due to increasing pressure from overseas low skilled / low wage economies. The evolvement of the UK economy to a service sector and high-tech manufacturing orientated economy requires a skilled workforce and Rotherham must ensure its own workforce is equipped to take advantage. Improvements in the qualifications of the working age population in Rotherham have been made with for example 22% now being qualified to at least NVQ level 4 (e.g. degree level) or above in 2008 compared to less than 15% in 2001.

However the gap to the national and regional averages remains substantial, with 26.6% qualified to NVQ4+ regionally and 30.5% nationally – i.e. Rotherham requires an additional 7,000 people up-skilled to reach the regional average or 12,000 to reach the national average. At the other end of the scale Rotherham has 5,000 more people without any qualifications than if at the regional average or 7,000 more than if reaching the national average. The importance of qualifications in the workforce is highlighted by the fact that the employment rate of those qualified to NVQ4+ in Rotherham is over 90% compared to an employment rate of just 40.9% for those with no qualifications.

There is better news when looking at school attainment with recent improvements in Rotherham narrowing the gap to the national average – the percentage of pupils at Key Stage 4 achieving 5 or more A*-C GCSE’s (including English and Maths) at 47.1% is now just 3.6 percentage points below the all England average. The NEET (not in education, employment or training) rate in Rotherham has also improved and for 2008 is below the regional rate and only slightly above the national rate.

Enterprise
The health and growth of the private sector within the local economy is a key element in the provision of employment and wealth creation across the borough and for the overall strength of the economy. Rotherham has historically had a low business to population ratio and this remains the case despite significant improvement over recent years to close the gap. With just 273 VAT and/or PAYE enterprises per 10,000 adult population Rotherham's performance is one of the worst in the region.

Rotherham has a higher concentration of businesses in the manufacturing and construction sectors compared to the regional and national averages with also a relatively high number in the mainly public service industries (administration, education and health). It has a correspondingly lower concentration of businesses in the professional, scientific and technical, and information and communications sectors. Rotherham also relies more heavily on large employers in providing employment – a potential weakness which makes Rotherham more susceptible to a general downturn in the national economy.

The rate of increase in workplace employment in the last 10 years has been over twice the regional and national average with the public sector, banking finance & insurance, and distribution sectors now more important than manufacturing in providing employment in Rotherham. Workplace employment within the Knowledge Intensive sectors has grown faster than regionally or nationally, closing the gap to both. This is important given projections suggesting that employment in these sectors will grow.

The business birth rate (start-ups) has been similar to the sub-regional average in recent years but remains well below regional and national rates. However, the three year survival rate for Rotherham businesses is higher than the regional rate and is particularly high in the council run business centres. The level of self-employment in Rotherham remains low with female self-employment being particularly low compared with regionally or nationally.

Estimates of Gross Value Added (GVA) for Rotherham show strong growth over recent years although this has fallen in 2008 as the recession began to impact on output. However a significant productivity gap to the UK average remains – to close this gap Rotherham's economy needs to continue to diversify and modernise, increase its business base, raise skills levels to attract high value jobs and investment, increase levels of employment and economic activity in the workforce.

Inclusion
The recovery in Rotherham from the closure of the areas coal mines and traditional industries has been substantial but disadvantaged communities and groups still exist across the borough. Overall deprivation appears to be

reducing with Rotherham improving from 48th most deprived local authority in 2000 to 68th most deprived by 2007. However almost 31,000 people, or over 12%, of residents in Rotherham still live within areas ranked in the top 10% most deprived areas nationally. The Economic Deprivation Index shows that over 37% of the borough remains within the top 20% most deprived nationally for employment.

Total out of work benefits had been falling but since the start of the recession in mid-2008 worklessness rates have risen sharply, driven by increasing numbers of Job Seeker Allowance claimants. However, Incapacity Benefit / Employment Support Allowance claimants still account for over half of all workless benefit claimants. The gap between the best and worst performing areas appears to be widening again in the current recession, with the highest rate of worklessness now at over 40% in one area compared to less than 5% in the best performing area.

Equivalised average household income in Rotherham is just 70% of the England average and approximately 36,000 households in the district are managing on less than the minimum income needed to achieve an acceptable standard of living; 55% of households in Rotherham East ward are living below this standard of living compared to 19% of households in Sitwell ward.

Whilst overall crime rates are amongst the lowest in South Yorkshire the current recession and increasing unemployment may increase this, particularly in the most deprived areas. There are generally high levels of ill-health across South Yorkshire, partly due to the areas industrial past, and mortality rates in Rotherham are above average, particularly for males. Life expectancy is improving but remains below the national average for both males and females.

Land, Buildings & Infrastructure
In addition to promoting economic growth of the borough we must provide quality, sustainable and mixed community neighbourhoods in order to retain existing residents and attract new workers to locate here. Businesses also expect a good transport infrastructure, an attractive environment, and a good supply of business units and/or developable employment land in the right locations if they are to relocate or invest.

Despite a falling population between 1981 and 2001 the number of households in Rotherham increased by over13,000 – due to increasing one-person households, particularly within the older age groups. Latest projections suggest that household numbers will increase by almost as much again to 129,000 by 2026. Over the last 10 years house prices in Rotherham have increased by 128%, despite falling back in the recession of the last two years, but the average price remains relatively affordable at around 77% of the national average. However the house prices to earnings ratio has increase substantially, particularly in the more desirable areas of the borough, making affordability an issue.

Rotherham has relatively low levels of home ownership compared to the national average with correspondingly high numbers in social rented accommodation. The Yorkshire & Humber Regional Spatial Strategy requires Rotherham to provide an additional 1,160 net additional homes per year to 2026 but we are currently well below this target with the recent economic downturn severely impacting on the house building / construction sector.

The net total floorspace on Rotherham's employment sites had reached over 2.84 million sq m by the end of 2009 with just under a quarter of this floorspace being constructed within the last 10 years. A significant proportion of this new floorspace has been constructed in the north of the borough, particularly around Manvers in the Dearne Valley, but also at other key sites such as Dinnington and Templeborough. Vacancy rates have risen over the last two years with some of the older units in less desirable locations to business being vacant for some time. The amount of economic land requiring reclamation and infrastructure has shrunk significantly and future employment land requirements are currently being considered by an Employment Land Review as part of the Local Development Framework.

Poor transport links will act as a barrier to long term sustainable economic growth and strong evidence that Rotherham and Sheffield share a single economy means it is essential that good transport links exist between the two. Key strategic transport corridors and future growth areas are covered by the South Yorkshire Local Transport Plan (SYLTP) - of particular relevance to Rotherham are the identified key economic regeneration sites at Manvers, Waverley, Dinnington, and Rother Valley in the borough, but also the Lower Don Valley area just over the border in Sheffield. This identifies congestion at peak times on some routes in/out of Rotherham and the need for improved transport links, particularly to the Rotherham-Sheffield corridor.

Environment
It is becoming increasingly important to consider the impact of local economic development on the environment and how the local economy will be affected by a transition to a low-carbon economy. There is a high level of commuting to / from Rotherham, particularly between Rotherham and Sheffield, with 39% of Rotherham's resident working population travelling outside the borough for work and over 30% of the workplace population in Rotherham have travelled into the borough. High commuting, coupled with low public transport usage and high car usage, impacts on energy consumption, congestion and air quality.

Traffic congestion is impacting on air quality in some parts of the borough, particularly close to Rotherham town centre and around M1 / M18 motorway junctions. Overall energy consumption and CO2 per head in Rotherham has been falling in recent years as the economy becomes less reliant on traditional manufacturing industries. Road transport now accounts for almost 30% of all CO2 emissions in Rotherham.

In the past an inevitable consequence of economic growth has been an increase in the amount of waste produced – in the future newer / more modern ways of working in businesses will be needed to ensure a more sustainable use of resources. Over recent years the handling of waste in Rotherham has been transformed; the percentage of municipal waste sent for land fill has fallen from almost 90% in 2002/03 to under 44% for the year 2008/09. Given the scarcity of suitable sites for land fill and the need to maximise use of natural resources this figure will need to reduce further which will primarily be done by greater reuse and recycling. This will also provide opportunities for new businesses within this sector in dealing with the processes in handling and recycling of this waste.

Rotherham Town Centre
Over the past few decades Rotherham has witnessed a steady drift of people away from the town centre, resulting in many people living, working and shopping outside of the centre. Rotherham residents are most likely to use Parkgate Retail World for shopping, Meadowhall / Sheffield City Centre for eating out and cinema / theatre, and local centres for pubs / clubs. The result has been the stagnation and decline of Rotherham as both an economic and social centre.

The Rotherham Renaissance program has begun to address some of these issues - significant progress has already taken place with successful completion of the Westgate Demonstrator Project, a new leisure centre at St Ann's, a new 'walk-in' PCT centre, and the refurbishment of Imperial Buildings to provide new retail units and living accommodation. There have been improvements around the High Street and the Minster through the Townscape Heritage Initiative and work has begun on Rotherham Central train station and on the new civic offices on the former Guest & Chrimes site. There remains significant work to do, with the recent recession impacting on many town centres across the UK and reflected in an increase in the number of vacant units in Rotherham town centre – increasing to 17.6% in 2009.

A recent retail study identified that there is a significant need for an improved retail and leisure offer in the town centre with potential capacity for a further 3,135 sq.m. of convenience goods floorspace and 11,150 sq.m. of non bulky comparison goods floorspace. There is a need for bigger shops providing more choice and variety, clear anchors, more recognisable branded retailers, more clothing retailers, more quality independent operators, more and better quality catering and restaurants, and more of a leisure offer – including a cinema. Currently too many vacant units reinforce the negative perceptions that exist amongst retailers and shoppers.

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Each of the above sections is explored in greater depth in the main body of this Local Economic Assessment, giving historic trends, latest available position, and projections where possible. The key issues facing Rotherham for each of these 'themes' is summarised at the end of each section with an overall summary / conclusions at the end of the document.

Assessing Rotherham's Economy

Approach

The Local Democracy, Economic Development and Construction (LDEC) Bill makes provision for the new local authority economic assessment duty. This requires all county councils and unitary district councils to prepare an assessment of the economic conditions of their area.

This Local Economic Assessment (LEA) has the following core objectives (as suggested in official guidance) in respect of understanding Rotherham's economy. It will provide a comprehensive and robust diagnosis of local economic conditions in the borough which should inform interventions by the local authority and its partners. It attempts to -

- Provide a sound understanding of the economic conditions in the area and how they affect residents and businesses.
- Identify the comparative strengths and weaknesses of the local economy and the nature and form of local economic challenges and opportunities.
- Identify the local economic geography, including the economic linkages between the area being assessed and the wider economy.
- Identify the local constraints to economic growth and employment and the risks to delivering sustainable economic growth.

The approach will focus on past trends and include the latest available data – identifying where Rotherham has improved but also where gaps remain to national and regional / local economies. Depending on the geographical level to which data is available, comparisons are generally made with both national (UK or Great Britain in most cases) and the regional (Yorkshire & Humber) averages. Comparisons with the Sheffield City Region economy, the South Yorkshire sub-region, and with individual South Yorkshire authorities are also made where appropriate.

Where appropriate the analysis also considers forecasts, for example around productivity and sector employment, for the local and wider economy. The impact of the recent recession which began mid-2008 and the potential long-term impact on Rotherham are also included when this more recent data is available. There are limitations to the amount and reliability of some of the data when looking at a relatively small economic area such as Rotherham – some economic data such as small industrial sector analysis is insufficient or unreliable at this level and can only sensibly be considered as part of the regional or city region picture.

An Economic Assessment of the Sheffield City Region[1] is being carried out and this assessment should be seen as being complementary to this with a more specific and detailed analysis of Rotherham's economy. This LEA will

[1] *Sheffield City region consists of nine local authorities – the four South Yorkshire authorities of Rotherham, Sheffield, Doncaster and Barnsley, plus Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales and North East Derbyshire.*

also form part of, and inform, the evidence base of the Local Development Framework. It should also help to inform other local strategies, such as Housing, Transport, and the Economic Plan and will form part of the evidence base in preparing the new Integrated Regional Strategy for Yorkshire & Humber. Performance measures from the new National indicators set are used where possible and these will highlight the relative performance of the local economy and help to inform the new comprehensive area assessment (CAA) which came into force in April 2009.

Guidance

Wherever possible this LEA follows guidance set out by the Department for Communities and Local Government (CLG) and also by the Improvement and Development Agency (I&DEA), but adjusted to take into account local economic priorities and concerns unique to Rotherham. The layout of the document reflects this guidance and analysis and performance is structured loosely around several 'themes' –

Business and enterprise

- Sectoral structure of local economy and significance of particular businesses.
- Enterprise and innovation: levels of and trends in businesses start-ups and closures, growth of small and medium-sized enterprises (SMEs), self-employment, and employment in, or growth of knowledge intensive industries and other high-growth sectors, and in the public sector.
- Local business needs and factors affecting business investment and economic growth

People and communities

- Demography: current and future population trends, particularly the working-age population.
- Labour market: occupational structure and patterns, including earnings, employment and unemployment rates.
- Skills: local skill levels, including educational attainment and skills gaps.
- Economic inclusion: areas or communities that exhibit high levels of deprivation and economic exclusion and the key underlying economic and social barriers to economic participation.

Environment

- Current and future issues including biodiversity, reducing waste and greenhouse gases and increasing renewable energy capacity.
- Pressures economic growth is likely to place on environmental sustainability, or potential opportunities for maximising 'green growth'.
- Risks from long-term climate change and their potential economic implications.

Land, buildings and infrastructure

- Existing and proposed land uses and infrastructure – physical and ICT – and whether they support the economic sustainability of the area, drawing on the evidence assembled to underpin local development frameworks (LDF's).

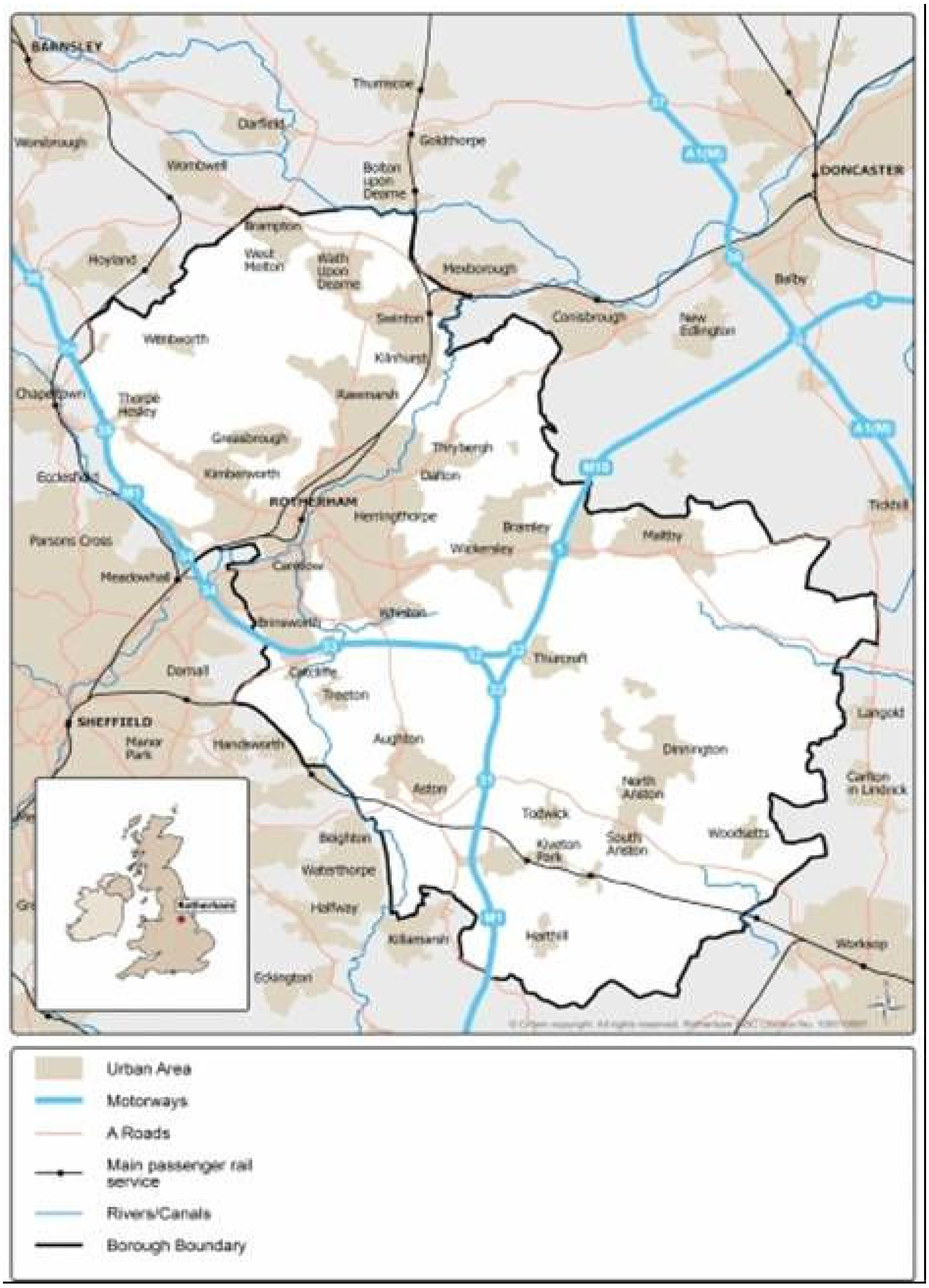
- Whether there is sufficient residential, commercial and industrial provision of the right size and affordability with sufficient infrastructure to support sustainable economic growth and economic inclusion.

Economic and spatial trends

- Considers past, present and future factors and linkages to understand impacts and trends:
- Reviews the current forecasting models relevant to the area – most likely to be associated with the regional economic strategy (RES) and regional spatial strategy (RSS) and being consolidated as part of the development of the integrated regional strategy (IRS) – to draw out key inferences for the development of the area in the short, medium and long-term.

ROTHERHAM IN CONTEXT

The metropolitan borough of Rotherham occupies an area of 28,653 hectares, one of four metropolitan areas within South Yorkshire, bounded by Sheffield to the west, Barnsley to the north, Doncaster to the east and North East Derbyshire and Bassetlaw (Nottinghamshire) in the south. The M1 motorway runs along much of the borough's western edge and the M18 bisects the borough to the south of Rotherham town centre.



Rotherham has excellent transport links to the rest of the country, served by the M1 and M18 motorways and an extensive network of rail and bus services (but lacking a direct service to London). There are five airports within a 50 mile radius, including "Robin Hood" airport near Doncaster.

History:

Rotherham developed from a small market town into a major industrial centre based on coal and steel. The population of the present Borough grew from 17,000 in 1801 to 120,000 in 1901. Most of the traditional industries of the 19th and 20th centuries have now vanished although there is still a steelworks at Aldwarke and a coal mine at Maltby. Many of the challenges facing the Borough stem from the decline in the areas traditional coal and steel industries. This has resulted in significant change within the population, the local economy, changing jobs and businesses as well as the environment, communities and social conditions.

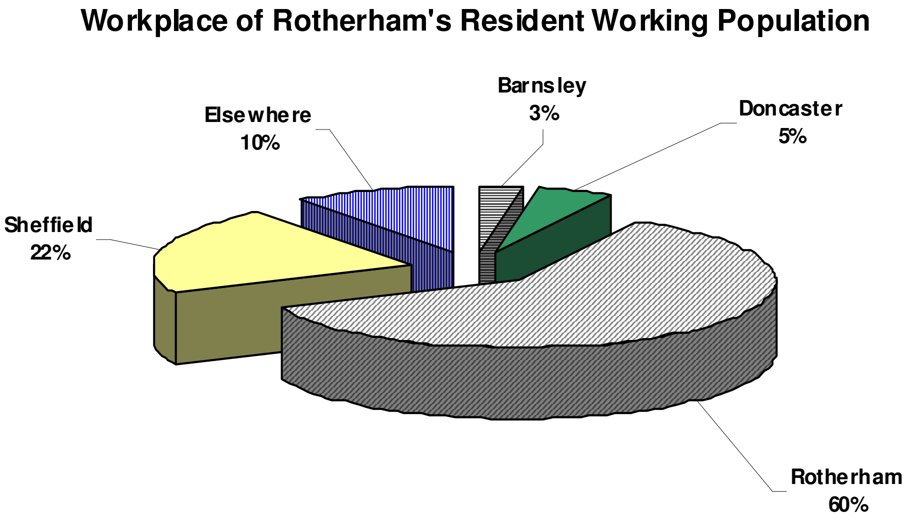
Rotherham has transformed itself over the last two decades to play a major role in the forefront of regeneration in South Yorkshire with many old industrial / colliery sites such as Manvers, Dinnington, Templeborough and Waverley now home to a variety of high profile companies, many in financial and business services and high-tech manufacturing. After a period of decline, the local economy has grown rapidly in recent years, boosting the employment rate from 67% in 1998 and reaching a high of 75% in 2004. Employment growth in the same period was 29%, the highest increase in Yorkshire & the Humber and Rotherham's unemployment rate also fell to below the national average.

Despite being more diverse the economy remains relatively more dependant on manufacturing for employment, the number of businesses remains well below average and the local workforce remains comparatively low-skilled. The recent national economic downturn and recession has highlighted these weaknesses and impacted badly on Rotherham's economy and on South Yorkshire as a whole. Unemployment has risen significantly and the employment rate gap to the national and regional averages has again begun to widen.

Economic relationships:

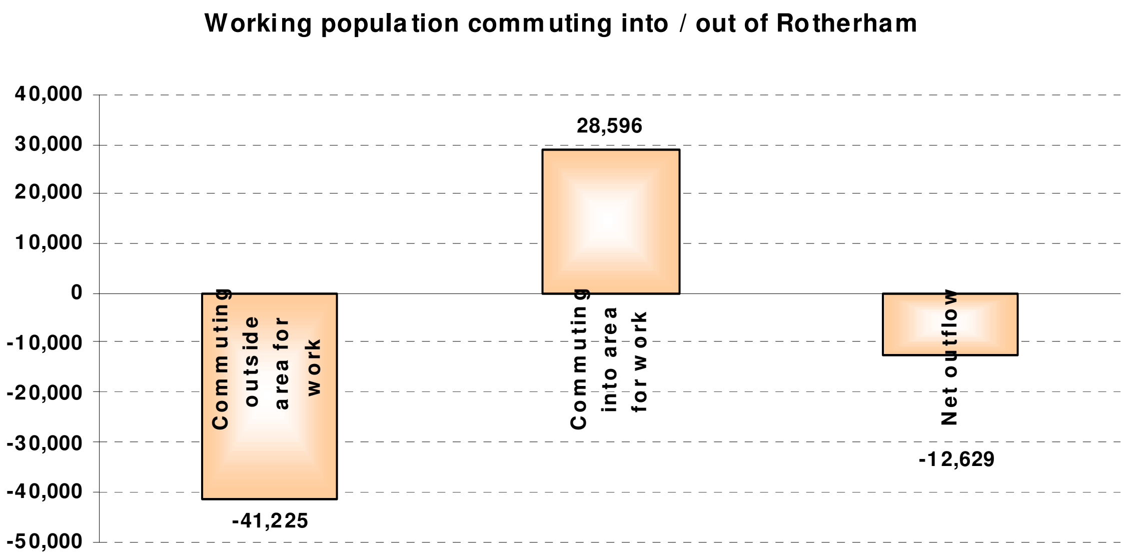
Rotherham is part of the Sheffield City region and Sheffield is a major source for employment opportunities for Rotherham's workforce, with the 2001 Census origin/destination statistics showed that only 60% of Rotherham's workers actually worked within the Borough, with 22% of workers commuting into Sheffield. There are several likely explanations for this.

- Geography: Many of Rotherham's workers, particularly in the South of the Borough, would find it easier to get to work within Sheffield's boundary than Rotherham's.
- Employers: Many local jobs are located in the lower Don Valley, equidistant between Rotherham and Sheffield, yet within Sheffield's borders.
- Economic: Sheffield, as a city economy, will always draw its workforce from the surrounding hinterland.



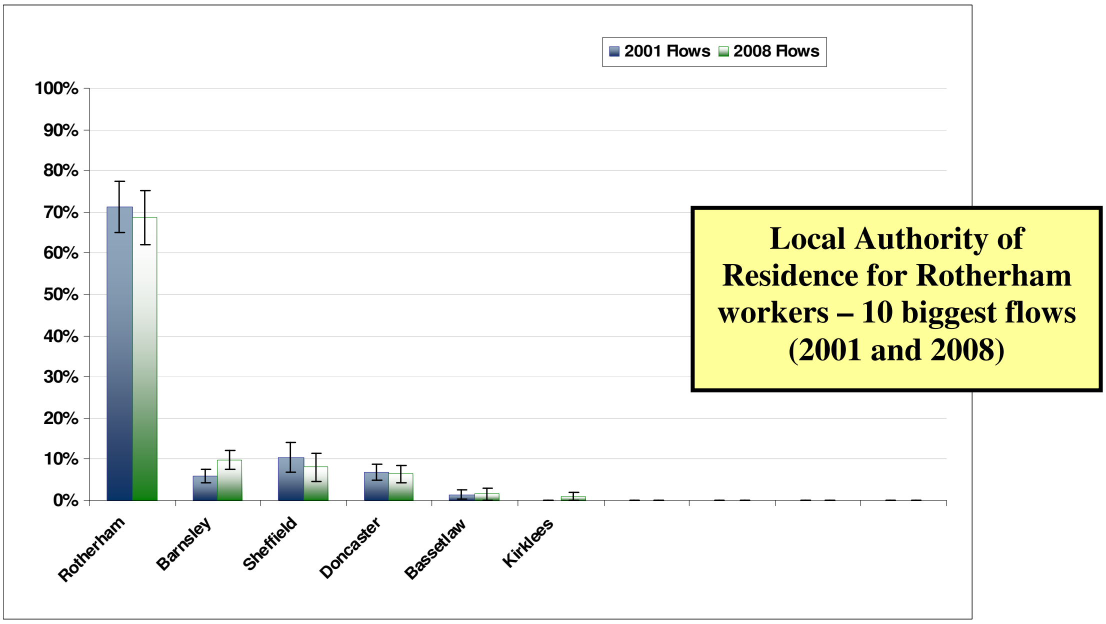
Source: 2001 Census. Crown Copyright

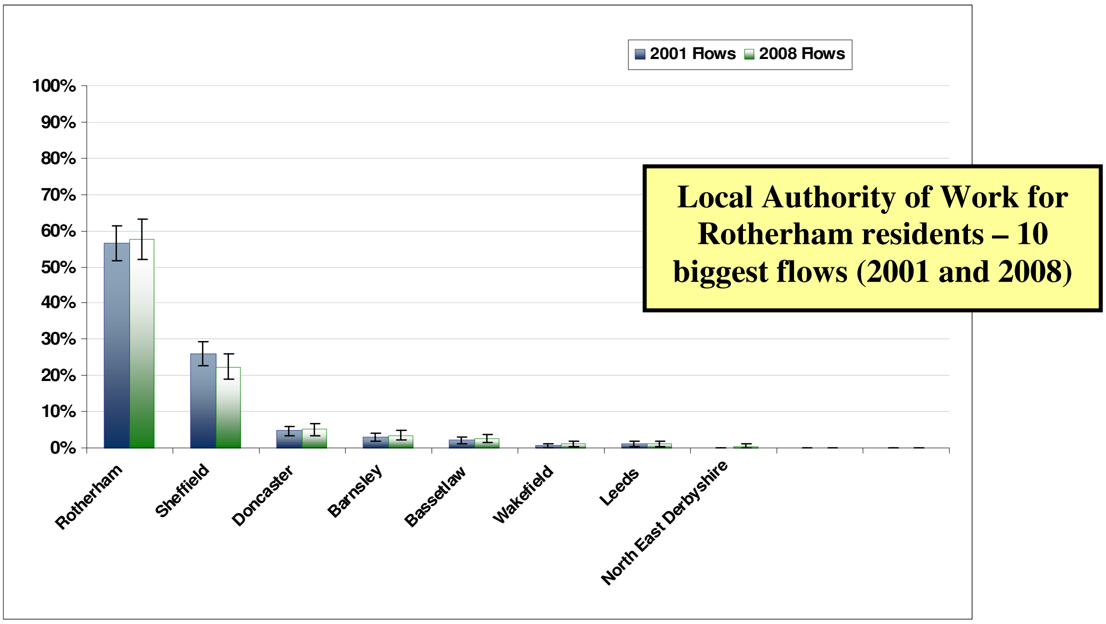
As a result, Rotherham is a net exporter of workers, with 40% of resident workers out commuting, and a figure equivalent to 27% of resident workers in-commuting. Over 30% of Rotherham's workplace population commute into the borough, with Sheffield accounting for 11%, Doncaster 7%, Barnsley 5% and 8% from elsewhere.



There have been significant changes in Rotherham's economy since these 2001 Census flows were measured – particularly with employment growth in areas such as the Dearne Valley. There are no more recent figures available but we can estimate the net outflow by comparing figures from the ONS Annual Population Survey (APS) residence and workplace jobs datasets – this indicates that the net commuting outflow from Rotherham has been decreasing (now less than 4,000). Important to note that it is the **net** outflow decreasing – **total** commuting (in and out of Rotherham) is likely to have increased.

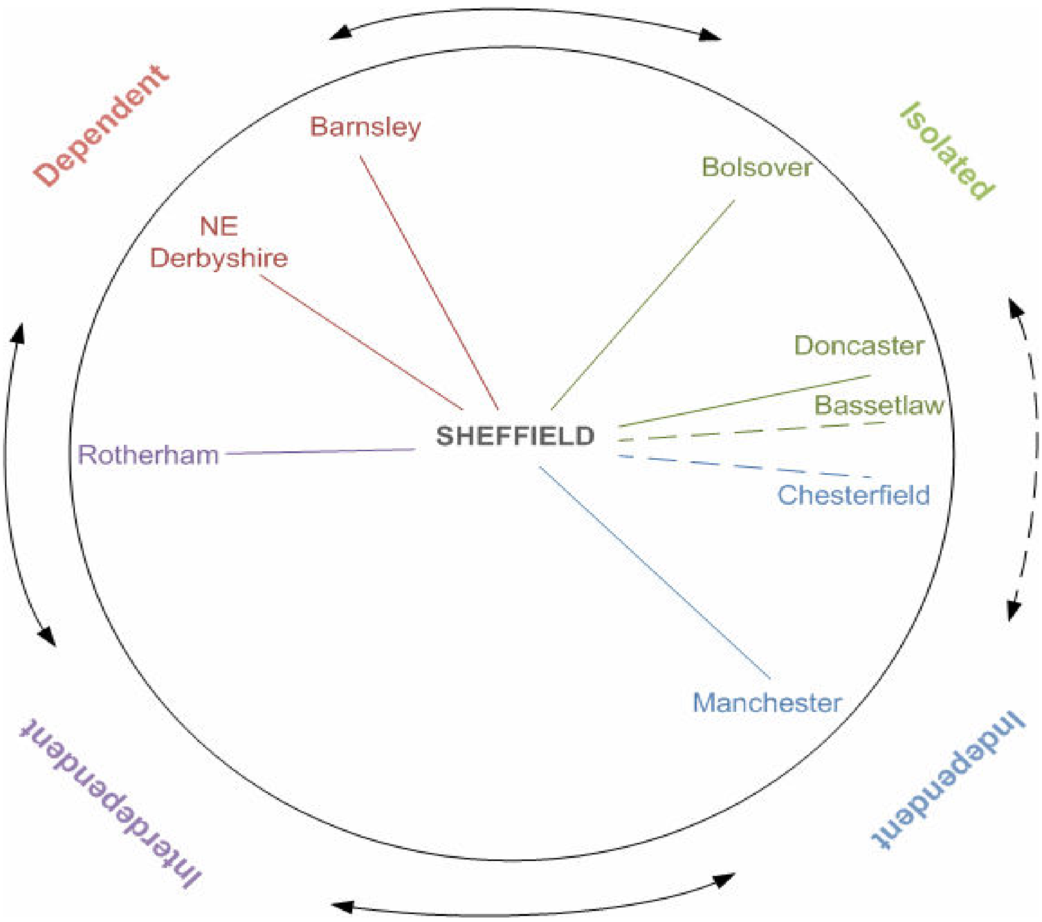
The ONS have recently produced a tool which is designed to support local authority's Local Economic Assessments by providing more up to-date evidence of commuting links, a key determinant of functional economic areas. This work aims to bridge the gap between Travel to Work Areas based on the 2001 census and the need for information about present day commuting patterns. However it should be noted that this work does not provide Travel to Work Areas for the present day.





This work can be subject to both sampling and non-sampling errors and most changes between the 2001 and 2008 datasets are not significant. However one change that does appear to be significant is in the number of workers in Rotherham whose place of residence is within Barnsley – increasing from 5.8% in 2001 to 9.7% in 2008. This is almost certainly due to the large increase in jobs created during this period within the Dearne Valley, which is an area easily accessible to Barnsley residents.

A new report, City Relationships[2], commissioned by The Northern Way and CLG attempts to address what makes city regions complementary. The broad City Relationships model proposes that core cities have differing relationships with surrounding areas. The factors that they identify as contributing to complementary relationships are skills, transport, businesses, the pull of the economic centre, the industrial history and the quality of place. Their analysis provides the following interpretation of what the relationship is between Sheffield as the economic centre and the rest of the city region districts. The 'Wheel' diagram below illustrates the relationship between Sheffield as the economic centre and the other districts - Rotherham has an interdependent relationship, reflecting its proximity and commuter evidence.



Source: City Relationship report 2009

A report on the Joint Economy of Sheffield and Rotherham[3] found that the two areas' economic centres are continuously linked to form a single agglomeration. These geographical links are in turn associated with dense patterns of economic interaction through direct business interactions (supply chains and clusters), based on strong sectoral complementarities, and through the labour market. As a whole this characterises the two economies

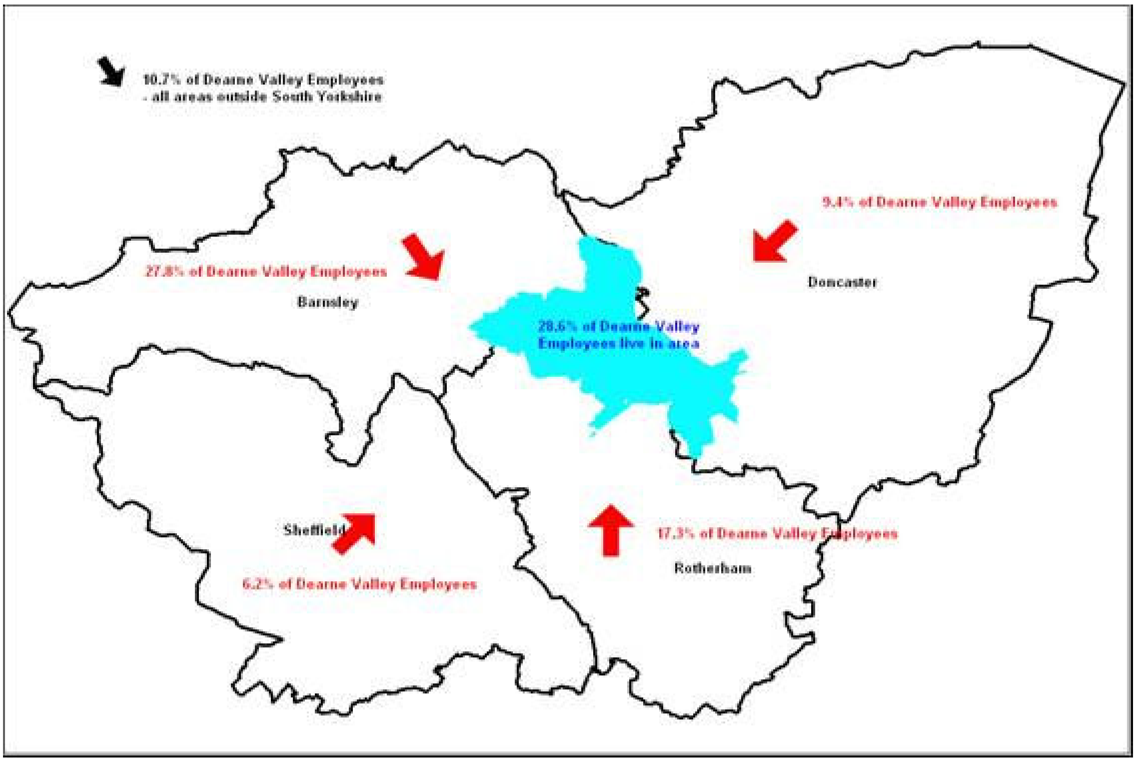
[2] *City Relationships: Economic Linkages in Northern City Regions (November 2009)*
[3] *Centre for Urban and Regional Studies School of Public Policy: The Joint Economy of Sheffield and Rotherham (April 2007)*

as a distinct economic entity within both the broader South Yorkshire sub-region and Sheffield City Region.

Many of the new jobs created in Rotherham in the last 10 -15 years have been concentrated in the Dearne Valley – an area to the north / north east of Rotherham town centre which also includes parts of Barnsley and Doncaster boroughs. Research undertaken in 2008 by means of a survey involving 20 major employers located within the Dearne Valley showed that only 28.6% of their employees actually lived within the Dearne.

Although Rotherham has the highest number / percentage of those living and working in the Dearne, it is people living in Barnsley who are more likely to travel into the Dearne for work based on this sample - possibly due to better transport links and/or skills. Overall, the biggest percentage of employees in the Dearne originates from within the Barnsley area.

Employees working in the Dearne Valley (sample)			
Sample Size:	**8,274**		*% of total*
Living in Dearne	**2,369**	**28.6%**	
Barnsley	654	27.6%	*7.9%*
Doncaster	689	29.1%	*8.3%*
Rotherham	1,026	43.3%	*12.4%*
Live outside Dearne	**5,905**	**71.4%**	
i.e. Commuting into Dearne:			
Other Barnsley	2,299	38.9%	*27.8%*
Other Doncaster	780	13.2%	*9.4%*
Other Rotherham	1,433	24.3%	*17.3%*
Sheffield	510	8.6%	*6.2%*
Other outside South Yorkshire	883	15.0%	*10.7%*



Structural Change:

By the end of the 1980's much of the traditional employment in mining, steel and related industries had disappeared and it wasn't until the end of the 1990's that large scale investment and regeneration began to have an impact – the changes in Rotherham's patterns of employment are highlighted by comparing the change in workplace employment sectors between 1998 and the latest available 2008 data.

ROTHERHAM WORKPLACE EMPLOYEES 1998 - 2008					
	1998	**%**	**2008**	**%**	**Change:**
Agriculture / Utilities	900	*1.1%*	1,400	*1.4%*	500
Manufacturing	22,000	*27.2%*	15,200	*15.3%*	-6,800
Construction	4,700	*5.8%*	6,800	*6.8%*	2,100
Distribution, hotels and restaurants	19,800	*24.4%*	21,700	*21.9%*	1,900
Transport and communications	4,300	*5.3%*	4,500	*4.5%*	200
Banking, finance and insurance, etc	8,700	*10.7%*	17,500	*17.6%*	8,800
Public administration,education & health	17,900	*22.1%*	27,900	*28.1%*	10,000
Other services	2,700	*3.3%*	4,300	*4.3%*	1,600
TOTAL:	81,000		99,300		18,300
Source: Annual Business Inquiry					

In 1998 manufacturing was the most important sector and accounted for over 27% of all employee jobs based in Rotherham. By 2008 manufacturing had been overtaken in importance as a source of employment in Rotherham by the public sector, distribution / hotels sector and the financial services sector (significant impact of call centres, particularly in the Dearne Valley). However, manufacturing remains a more important sector for employment in Rotherham than the regional or national average.

The make-up of employees in Rotherham has also changed with jobs taken by females increasing at a faster rate than males – number of workplace jobs is now roughly equal for both sexes. There has also been an increase in part-time[4] working with part-time jobs now accounting for almost one-third of all workplace employee jobs in Rotherham.

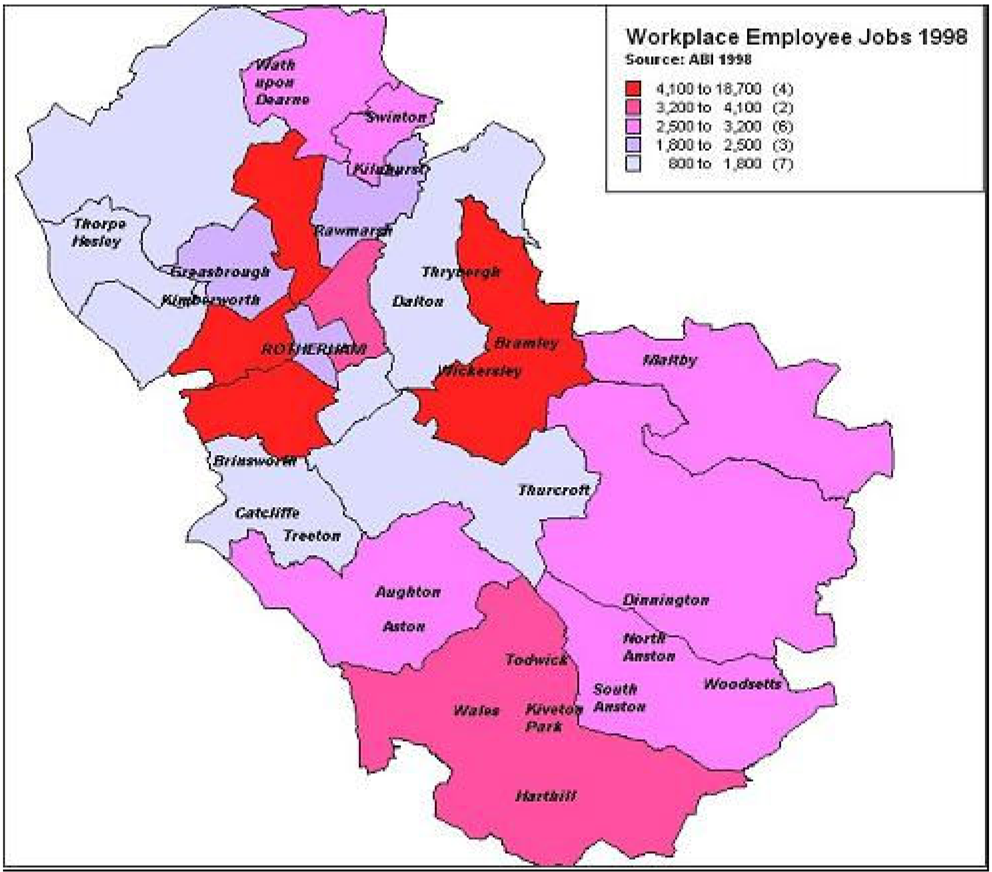
	1998		**2008**		**Change:**
Male	42,200	52.2%	49,600	49.9%	7,400
Female	38,700	47.8%	49,700	50.1%	11,000
Total	80,900		99,300		18,400
	1998		**2008**		**Change:**
Full Time Workers	56,200	69.5%	67,400	67.9%	11,200
Part Time Workers	24,700	30.5%	31,900	32.1%	7,200
Total	80,900		99,300		18,400
Source: Annual Business Inquiry					

The largest percentage of new part-time jobs have been taken by women and half of all female employees in Rotherham work part-time compared to less than 14% of males.

[4] *Part-time employees are those working for 30 or fewer hours per week.*

	1998		2008		Change:
Male Full Time Workers	37,100	87.9%	42,800	86.3%	5,700
Male Part Time Workers	5,100	12.1%	6,800	13.7%	1,700
Total	42,200		49,600		7,400
	1998		2008		Change:
Female Full Time Workers	19,100	49.4%	24,600	49.5%	5,500
Female Part Time Workers	19,600	50.6%	25,100	50.5%	5,500
Total	38,700		49,700		11,000
Source: Annual Business Inquiry					

The geographical location[5] of jobs had also changed during this period – the map below from 1998 shows most employee jobs located in and to the west (including Templeborough, Masbrough areas) of Rotherham town centre, plus the Parkgate area to the north, and the Bramley area to the south-east of the town (which includes Hellaby Industrial Estate at Junction 1 of the M18).



By 2008, the latest data available, other areas of the borough had also become important for providing employment. The Dearne Valley area close to Wath (chiefly developments along Manvers Way) and the Dinnington area both showing strong growth – Wath ward alone experienced an increase of 10,000 jobs in this period.

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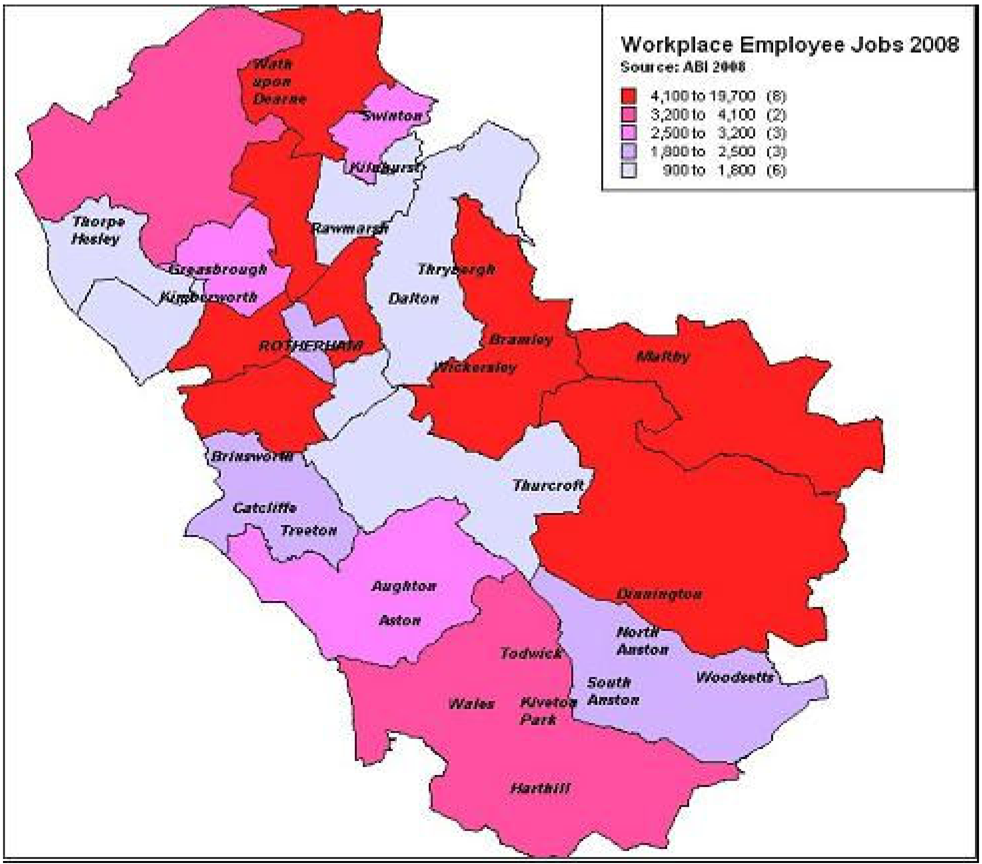
[5] *Areas based on 'old' (pre-2004) Rotherham 22 ward boundaries to allow comparison over time.*



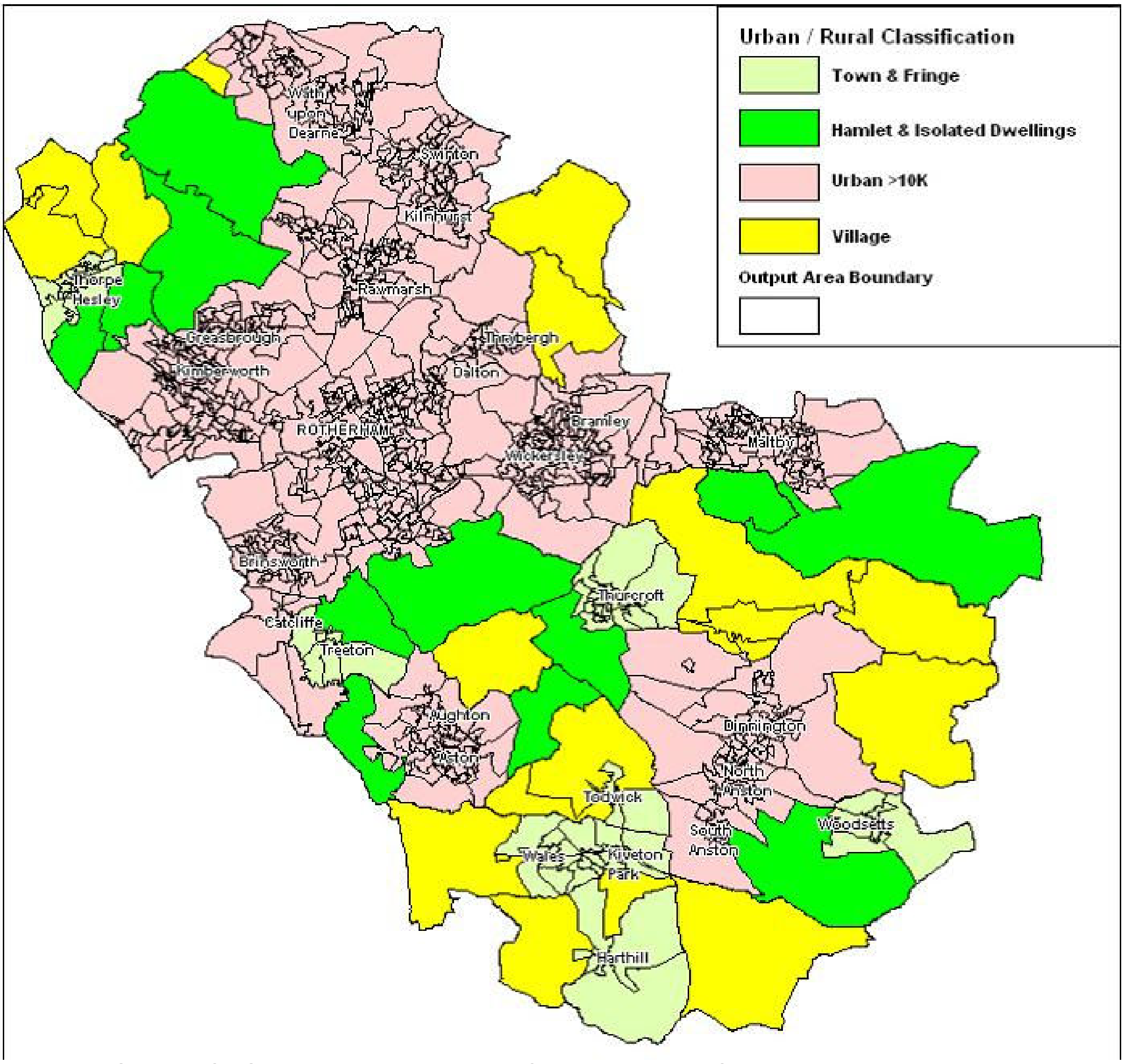
Wath (due to developments off Manvers Way), Bramley / Wickersley (due to Hellaby Industrial Estate expansion & Bramley Lings area), Brampton (due to Manvers / Cortonwood developments) and Dinnington (due to former colliery reclamation / redevelopment) have been the areas driving employment growth over the last decade.

Ward (pre-2004 boundaries)	1998	2008	Jobs Change
Anston and Woodsetts	2,500	2,000	-500
Aston, Orgreave and Ulley	2,800	2,800	0
Boston	11,900	10,100	-1,800
Bramley, Ravenfield and Wickersley	5,300	7,900	2,600
Brampton, Melton and Wentworth	1,800	3,700	1,900
Brinsworth, Catcliffe and Treeton	1,300	2,200	900
Broom	1,700	1,500	-200
Central	18,600	19,600	1,000
Dalton, Hooton Roberts and Thrybergh	900	1,600	700
Greasbrough	2,000	2,600	600
Herringthorpe	4,100	4,900	800
Kimberworth	1,200	1,400	200
Kiveton Park	3,400	3,700	300
Maltby	3,200	4,400	1,200
Park	2,200	2,000	-200
Rawmarsh East	2,100	1,500	-600
Rawmarsh West	4,600	4,300	-300
St. John's (Dinnington)	2,800	4,500	1,700
Swinton	2,600	3,000	400
Thorpe Hesley	1,400	900	-500
Thurcroft and Whiston	1,800	1,800	0
Wath	2,700	12,900	10,200
Total:	**80,900**	**99,300**	**18,400**
Source: Annual Business Inquiry			

Urban / Rural Economy

Large parts of Rotherham are rural in nature and many small settlements have their own economy and differing economic relationships and links with the town centres / larger settlements in the borough.

A new urban / rural classification was developed for every Output Area (OA)[6] in the country and this is shown for Rotherham on the map below -



Source: ONS, Rural and Urban Area Classification for Output Areas, 2004

All classifications are based on the predominant 'named' morphology[7] of an Output Area. That being either:

• 'Urban >10k' (Urban Settlements with greater than 10,000 population);

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[6] *The smallest ONS level of geography, there are 830 Output Areas in Rotherham*

[7] *'Morphology' here means the form or structure of the settlement which includes this area - e.g. whether this area is part of a town, a village or an urban fringe etc. The 'morphology' of a given area is determined by the population density of the area and its wider surroundings*

• 'Town and Fringe' (Small Towns and Fringe areas that are located within the rural domain);
• 'Village' (Villages that are located within the rural domain); or
• 'Hamlet & Isolated Dwellings' (Hamlet & Isolated Dwellings that are located within the rural domain).

Those areas classified as urban cover the area radiating from Rotherham town centre out to Sheffield in the west, to the Wath / Swinton area in the north, and to Maltby in the east. All other areas (Town & Fringe, Hamlet & Isolated Dwellings, and Village) are classified as rural and within Rotherham are primarily in the north-west around Wentworth and large parts of the southern area of the borough.

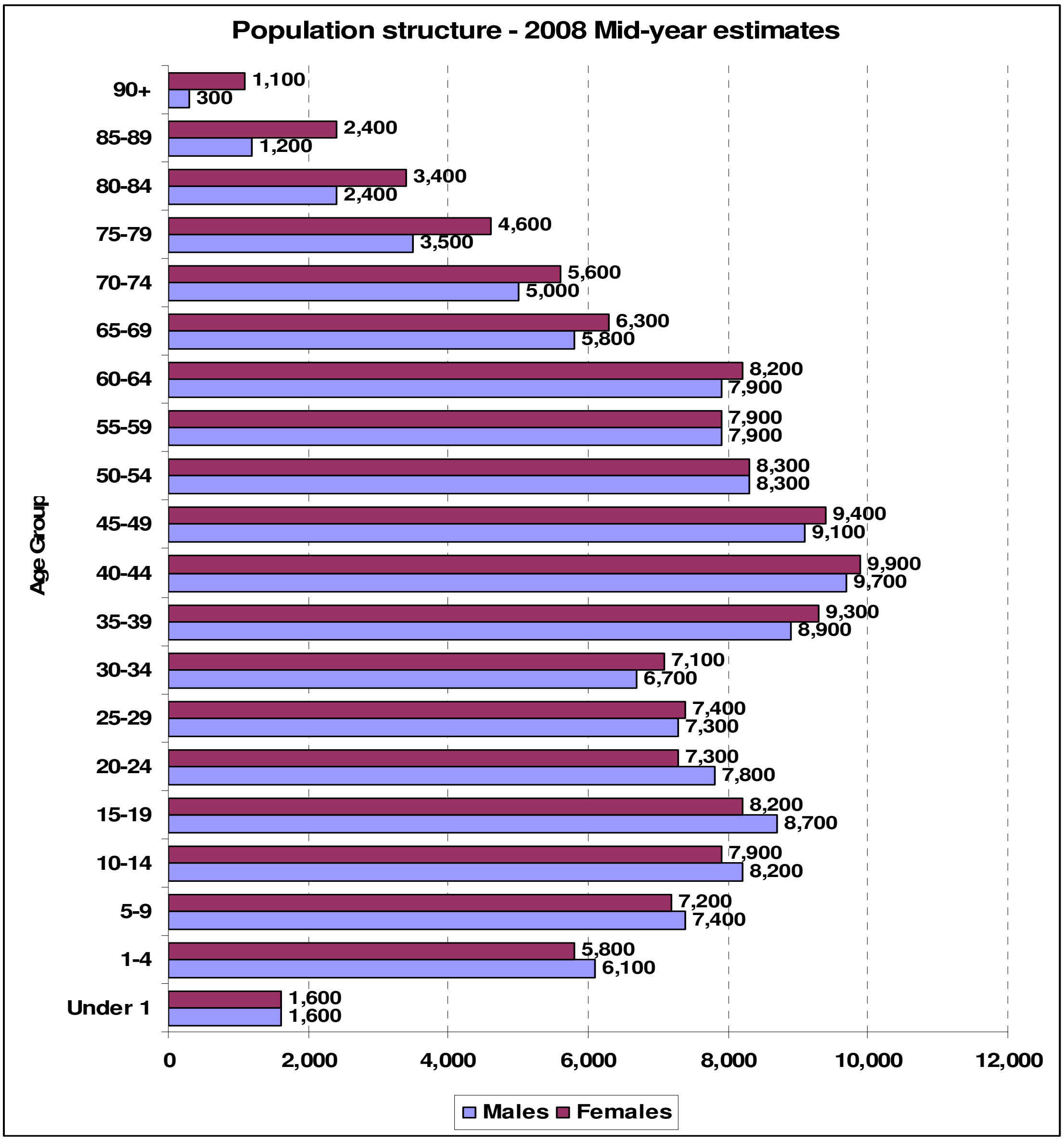
People in rural areas experience the same financial challenges as people living in more urbanised areas. But living in a rural area may bring additional challenges such as less accessibility to bank or post office branches or additional travel costs. Many minor settlements in the rural areas of the borough have developed their own small businesses which are an important source of local employment, reducing the need for travel and helping to maintain the sustainability of these settlements.

In addition to their economic contribution, our rural areas are frequently home to landscapes of national importance, high levels of biodiversity and provide a range of public benefits and amenity value that are not recognised in a straightforward analysis of economic activity. In seeking to support the optimum level of sustainable economic growth in all localities, we must not lose sight of the features that make rural areas unique.

DEMOGRAPHY

The Office for National Statistics (ONS) compiles annual Mid-Year estimates of the population in local authority areas by age and gender. The annual updates take account of the ageing of the population and for additions and reductions caused by births, deaths and the migration of people to and from an area. The latest Mid-2008 population estimates (revised in May 2010) released by ONS show the UK population continuing to age, with the number of people over the age of 85 increased from 873,300 to 1,335,400 between 1991 and 2008. This age group now makes up 2.2% of the population.

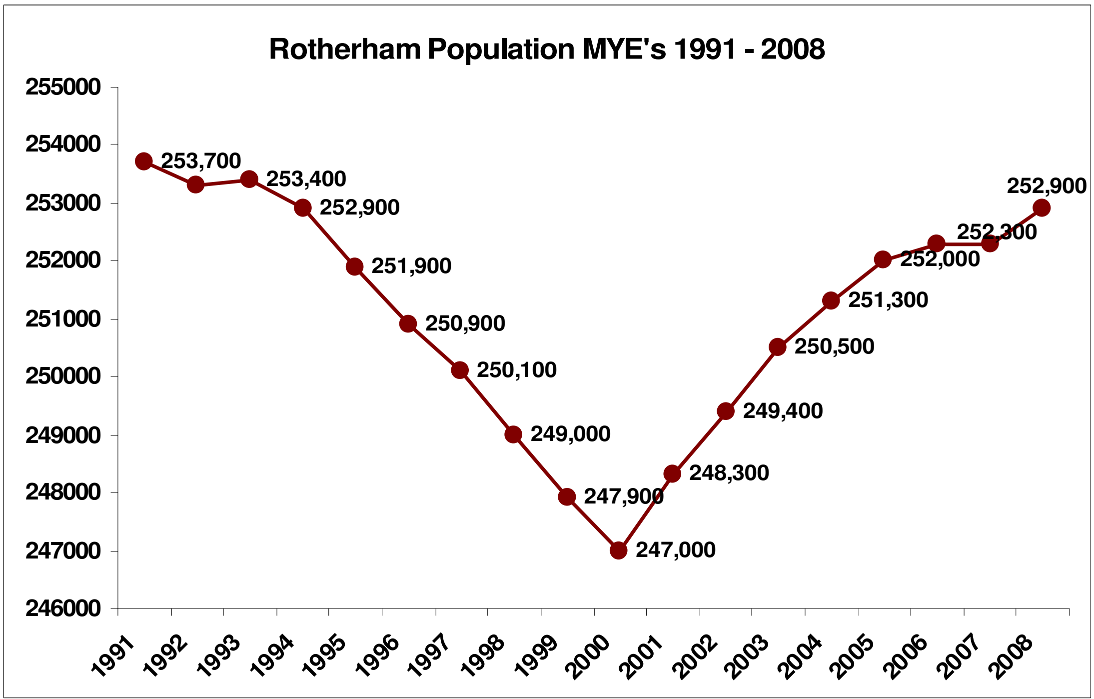
The chart below shows the age distribution of people resident in Rotherham. There are more males than females up to age 24; however, females outnumber males in all other age groupings, except the 50 to 59 age range where there are equal counts of both males and females. The 90 plus age group has the largest difference between males and females, with 3.7 women for every man.



Source: ONS 2008 Mid-year estimates

Population change in Rotherham

Mid-year population estimates since 1981 show a decline in the population of Rotherham from 1981 to 1988. After a brief period of increase the downward trend resumed in 1991 with the population falling to 247,000 in 2000. However, in 2001 the population began to grow, a trend which has continued with the population climbing back to 252,900 in 2008, a rise of 5,900 since 2000. The average annual increase since 2000 has been over 700. Past decline was linked to economic decline and job growth began to stimulate inward migration after 2000.



Source: ONS Mid-year estimates 91-08

Whilst the population is now back close to 1991 levels there are changes in the age make-up of the population with a reduction in children and the working age groups but a significant increase in the older, mainly retired, age groups.

	1991	2008	Change
Children 0-15	53,500	49,200	**-4,300**
Working age 16-64M/59F	156,700	153,800	**-2,900**
Older people 65M/60F and over	43,500	49,900	**+6,400**

The population change seen in Rotherham since 2001 differs in that the working age population has increased substantially. Whilst the school age population is still falling the decline is now slowing and the number of children aged 0-4 has shown an increase, reflecting a rising birth rate. Rotherham's older population (over 60) continues to increase – by 2008 just over 18% of Rotherham people were aged below 15, whilst almost 23% were aged 60 or over.

	2001	2008	Change
Children 0-15	52,200	49,200	-3,000
Working age 16-64M/59F	150,800	153,800	+3,000
Older people 65M/60F and over	45,400	49,900	+4,500

Components of Population Change

Mid-2008 population estimates released by ONS show that the population of Rotherham was 253,900 at 30th June 2008, an increase of 600 compared with Mid-2007. The increase in the population of Rotherham since 2007 is mainly a result of natural increase as there was a net outward migration. There were 3,300 births in Rotherham during 2007/08 which outnumbered the 2,700 deaths to give a natural increase of 600. This was countered by net outward migration of 100 people (note that due to rounding to nearest one hundred totals may not always agree)

During the 1990's net migration was the primary reason for Rotherham's falling population but since 2000 net migration (internal and international) has been the main factor in the population increasing. This reflects the strength of the local economy in this period with substantial job creation in the borough. The last two years have seen natural change become the predominant reason for population growth with an increasing birth rate and net outward migration.

ROTHERHAM POPULATION CHANGES (mid-year 1991 - 2008)						
	Live Births	Deaths	Natural Change	Net Migration & other changes	Total Change	Population
1991-92	3,700	2,700	900	-1,300	-300	253,300
1992-93	3,500	2,700	900	-800	100	253,400
1993-94	3,400	2,900	600	-1,100	-500	252,900
1994-95	3,200	2,700	500	-1,500	-1,100	251,900
1995-96	3,200	2,800	400	-1,400	-1,000	250,900
1996-97	3,200	2,700	500	-1,300	-800	250,100
1997-98	3,000	2,700	200	-1,300	-1,100	249,000
1998-99	3,100	2,700	400	-1,400	-1,100	247,900
1999-2000	2,800	2,500	300	-1,300	-900	247,000
2000-01	2,800	2,600	300	1,100	1,300	248,300
2001-02	2,700	2,700	0	1,100	1,100	249,400
2002-03	2,800	2,700	100	900	1,100	250,500
2003-04	2,900	2,800	100	600	800	251,300
2004-05	2,900	2,600	300	500	800	252,000
2005-06	3,000	2,600	500	-200	300	252,300
2006-07	3,000	2,500	500	-500	0	252,300
2007-08	3,300	2,700	600	-100	500	252,900
Source: ONS Mid-year Population Estimates (components of change)						

Population Projections

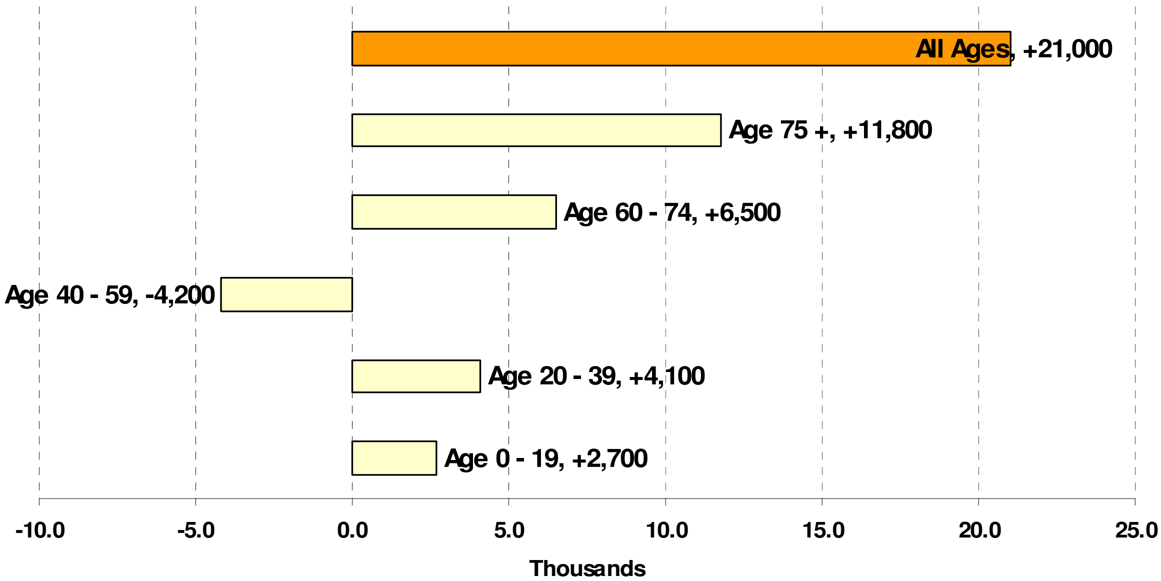
The latest population projections from ONS are the 2008 based series which use the newly revised 2008 mid year estimates as a baseline. For Rotherham these show a smaller projected rate of increase than the previous 2006-based series but the population is still expected to continue to rise steadily in the coming years.

Projections to 2033 show Rotherham's population, increasing by 11.5% from the 2008 baseline, slower than the predicted growth for South Yorkshire (16.2%) and at a slower rate than the predicted national (18.0%) and regional (20.7%) averages. Looking at the period to 2027 natural change is predicted to have the greatest impact on the increase in the early years and up to 2022, with net migration (primarily within the UK) becoming the biggest factor beyond this.

2008 Baseline Population = 252,900			**Components of Change**		
ONS Projections:		Increase:	Natural Change (Births - Deaths)	Net Internal Migration	Net International Migration
2012	256,700	3,800	2,700	300	900
2017	262,800	6,100	3,700	1,400	1,000
2022	269,600	6,800	3,800	2,100	900
2027	275,700	6,100	2,900	2,300	1,000
	Total:	**22,800**	**13,100**	**6,100**	**3,800**
	%	***9.0%***	***57.5%***	***26.8%***	***16.7%***
Source: ONS 2008 based sub-national population projections (totals may not agree due to roundings)					

Increases are predicted to be primarily within the older age groups with limited growth expected in the younger age groups. The working age population will increase only slowly although increasing retirement ages, with many people choosing or having to work beyond the current 'normal' retirement age, will have an impact upon the size of the workforce.

ONS 2008-based sub-national population projections for Rotherham (changes 2010 to 2027)



Migration

There is a high degree of uncertainty over future levels of migration (both internal and external) which could significantly alter the projections and reality of population growth in the coming years. However it is clear that during the last few years migration has played a major part in boosting Rotherham's population.

	Internal Migration			International Migration			
	In	Out	Net	In	Out	Net	All (Net)
2001 - 02	7,100	6,300	800	900	400	500	**1,300**
2002 - 03	7,200	6,200	1,000	700	500	200	**1,200**
2003 - 04	6,900	6,400	500	600	400	200	**700**
2004 - 05	6,400	6,100	300	900	500	400	**700**
2005 - 06	6,500	6,600	-100	800	700	100	**0**
2006 - 07	6,300	6,900	-600	900	700	200	**-400**
2007 - 08	6,300	6,800	-500	900	500	400	**-100**
Total	**46,700**	**45,300**	**1,400**	**5,700**	**3,700**	**2,000**	**3,400**

Source: ONS Migration indicators by local authority areas in England & Wales, mid-2001 to mid-2008

Both internal (from other parts of the UK) and international migration (from outside the UK) have contributed to a rising population since 2001. A major factor in the rise in international migrants to Rotherham, and the UK in general, has been the enlargement of the European Union with many workers entering the UK from the 12 Accession countries[8] in Eastern European countries since May 2004.

A National Insurance Numbers (NINo) is allocated to adult overseas nationals entering the United Kingdom which provide a measure of in-migration (inflow) - however they do not reflect emigration (outflow, i.e. migrants who leave the UK) or the overall migrant population (stock). The registration date represents the date the information on the individual was processed on HM Revenue and Customs' National Insurance Recording System (NIRS) and data is available at a local authority level.

Figures for authorities in South Yorkshire as below:

NINo registrations to adult overseas nationals entering the UK by year of registration

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Barnsley	190	220	390	790	940	800	720
Doncaster	830	710	1,080	2,670	2,050	2,300	1,810
Rotherham	550	460	570	1,150	1,060	1,220	1,130
Sheffield	2,710	2,850	2,360	4,380	5,080	5,280	5,810

Source: DWP NINo Registrations

The increase in NINo registrations across South Yorkshire can clearly be seen to accelerate from 2004/05 – i.e. after EU enlargement.

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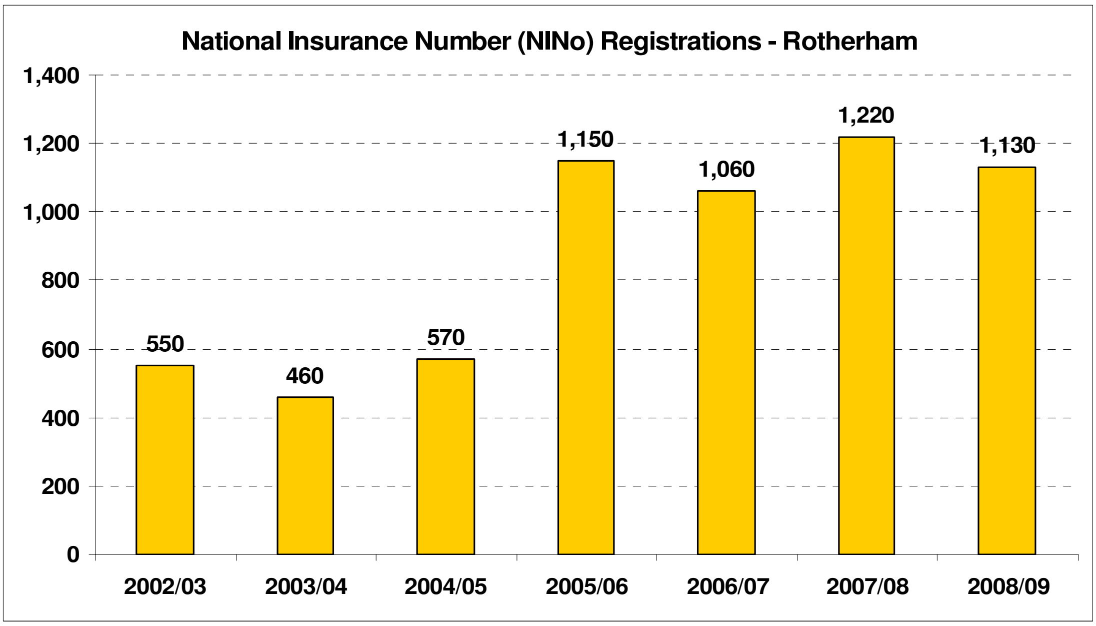
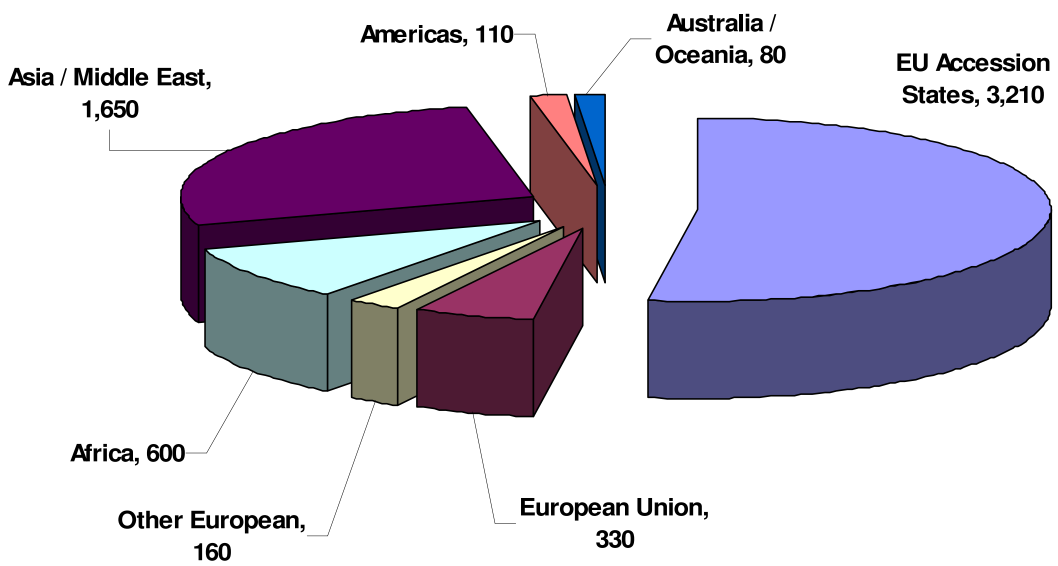
[8] The 12 Accession countries - Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia, which joined on the European Union (EU) on 1st of May 2004, and Romania and Bulgaria, who have joined on 1st January 2007.



Numbers in Rotherham have remained at 1,000 plus since 2005/06 although it is important to remember that the data does not measure how many workers are returning – national evidence suggests that many eastern European workers have returned home since the start of the current recession.

Registrations by area of origin is also available and highlights the impact of the EU Accession States with over 52% of worker registrations in Rotherham for the period 2002/03 to 2008/09 originating from these countries.

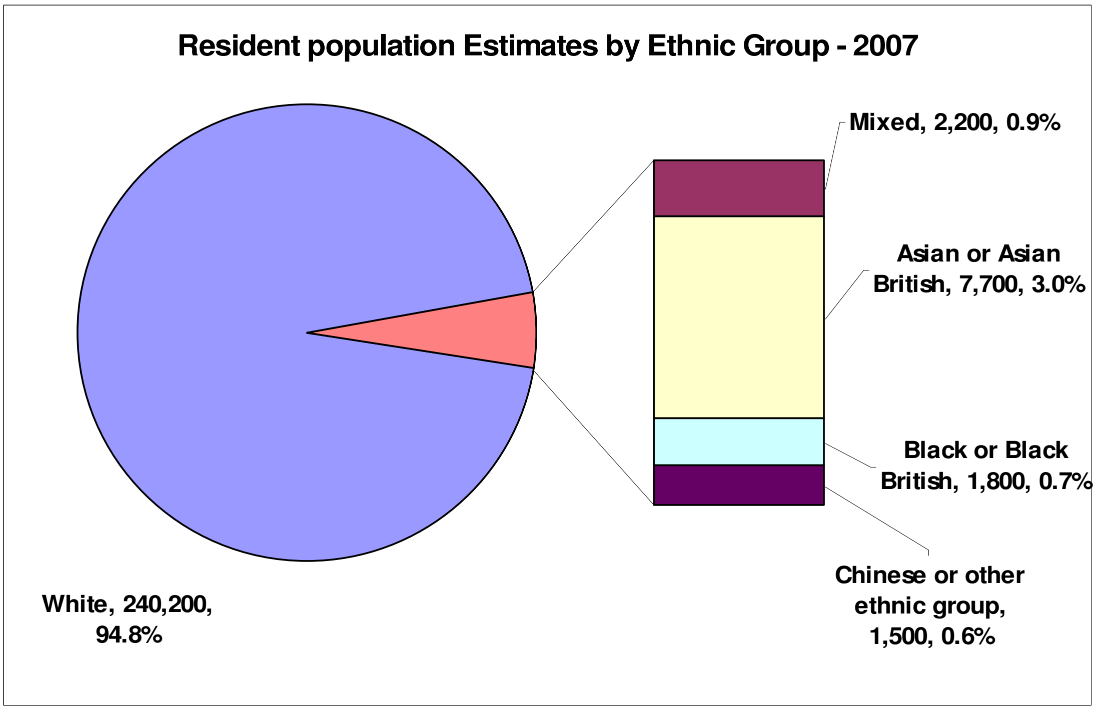
NINo Registrations - World Area of Origin 2002/03 to 2008/09



Source: DWP NINo Registrations

Population by Ethnic Group

The latest available breakdown of the population by ethnic group is for 2007 – this shows that there has been an increase in the 'non-white' ethnic population in Rotherham since the 2001 Census, from 3.1% to 5.2%. Split by broad ethnic group (using Census 2001 definitions) as below:



Source: ONS Resident Population Estimates by Ethnic Group 2007

Asian or Asian British remains the largest ethic minority population but there as also been an increase in the number of people in the 'white' category classified as 'other white'.

Demography: Key Issues

Population

- Since 2000 Rotherham's population has increased by 5,900 to reach 252,900 by mid-2008 but in line with national trends this increase has been primarily within the older, mainly retired, age groups
- Inward migration main reason for increase as the economy grew and job opportunities increased but last two years natural change as been the main factor

Projections

- Projections to 2033 show a continuing steady rise in Rotherham's population, increasing by 11.5% from the 2008 baseline, slower than the South Yorkshire, national, and regional rates
- Growth primarily within the older age groups with working age population increasing only slowly i.e. an ageing population
- Increasing age of retirement and the wish / necessity of some people to work beyond 'normal' retirement age will have an impact upon the future size of the workforce

Migration

- Both internal (from other parts of the UK) and international migration (from outside the UK) have contributed to a rising population since 2001.
- A major factor in the rise in international migrants to Rotherham, and the UK in general, has been due to EU enlargement with many workers attracted to the UK from Eastern European

Ethnicity

- Ethnic 'non white' groups increased from 3.1% of population in 2001 to 5.2% in 2007

EMPLOYMENT

The Office for National Statistics Labour Force Survey (LFS) and, from 2005, the replacement Annual Population Survey (APS), produces data on the percentage of working age people who are:

- **Economically active** – rate calculated as % of working age population; and
- **Economically inactive** - classified as not working and not having looked for work in last 4 weeks (includes students, long-term sick, discouraged workers etc); rate calculated as % of working age population

Economically active people can be:

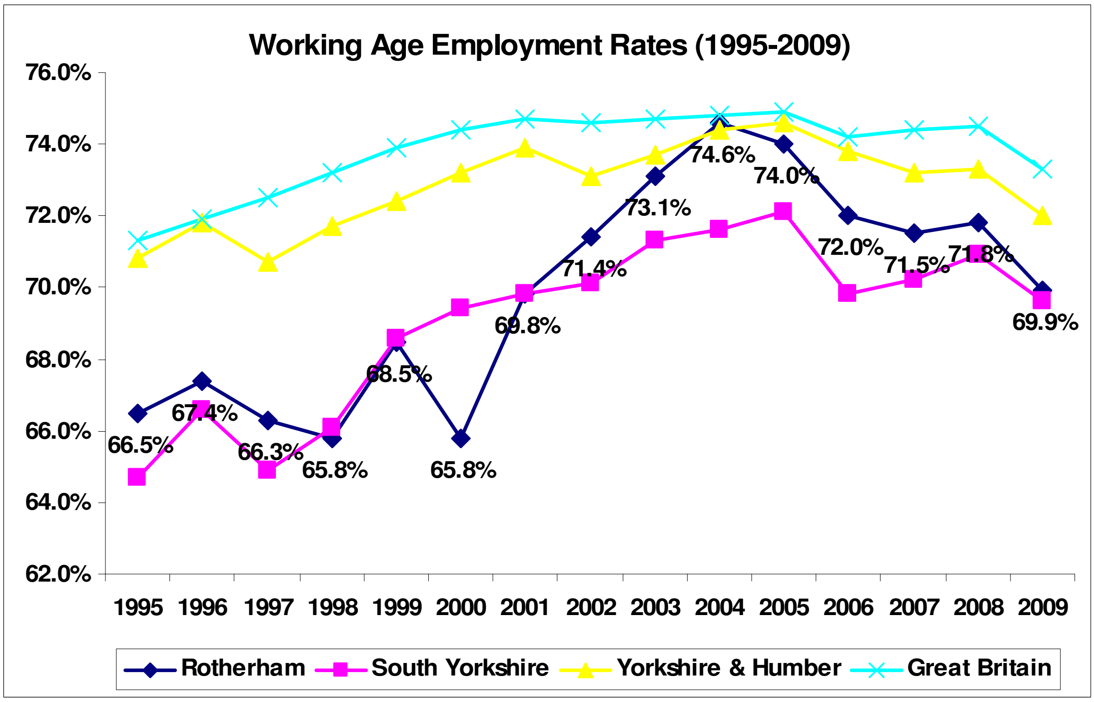
- **employed** - employment includes those on Government supported training; employment; or
- **unemployed** - classified as not working but having looked for work in the previous 4 weeks

Employment rate is calculated as % of working age population.
Unemployment rate is calculated as % of economically active population.

Although the LFS (and to a lesser extent the APS) is prone to accuracy problems at small area level, it can still demonstrate general trends particularly over longer periods of time.

Employment Rate:

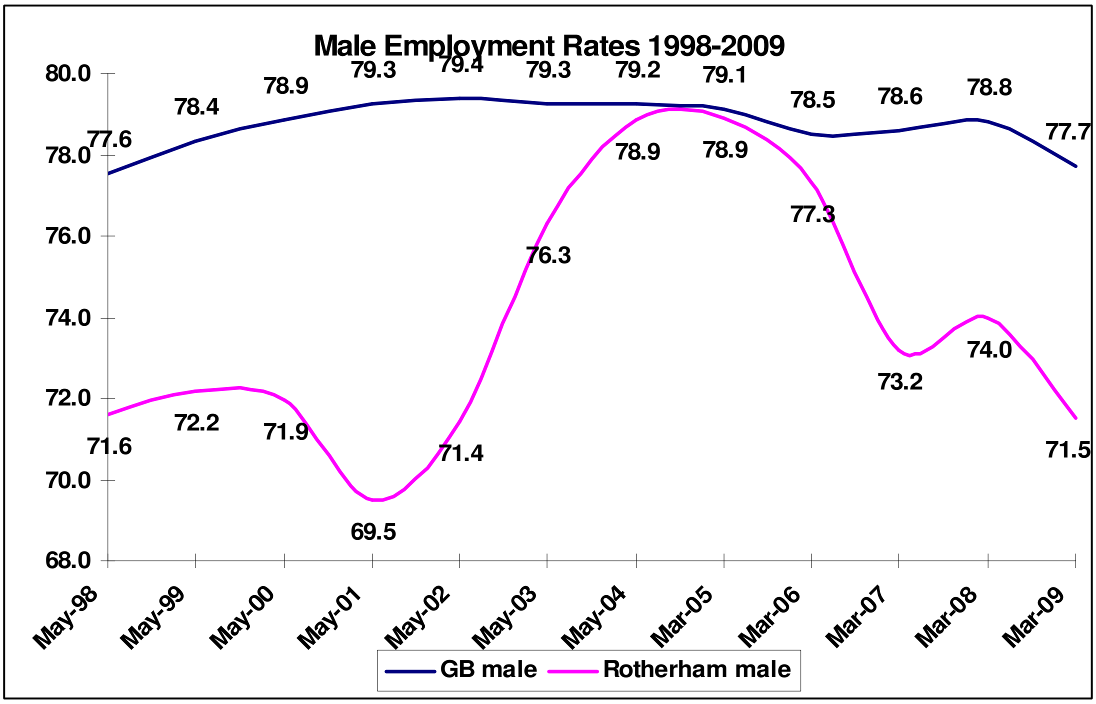
Rotherham has made great strides in increasing employment over the last 10-15 years with the employment rate of the working age population rising from the 65%-66% range during the mid-1990's to reach 74% in 2004/05, close to the national average.



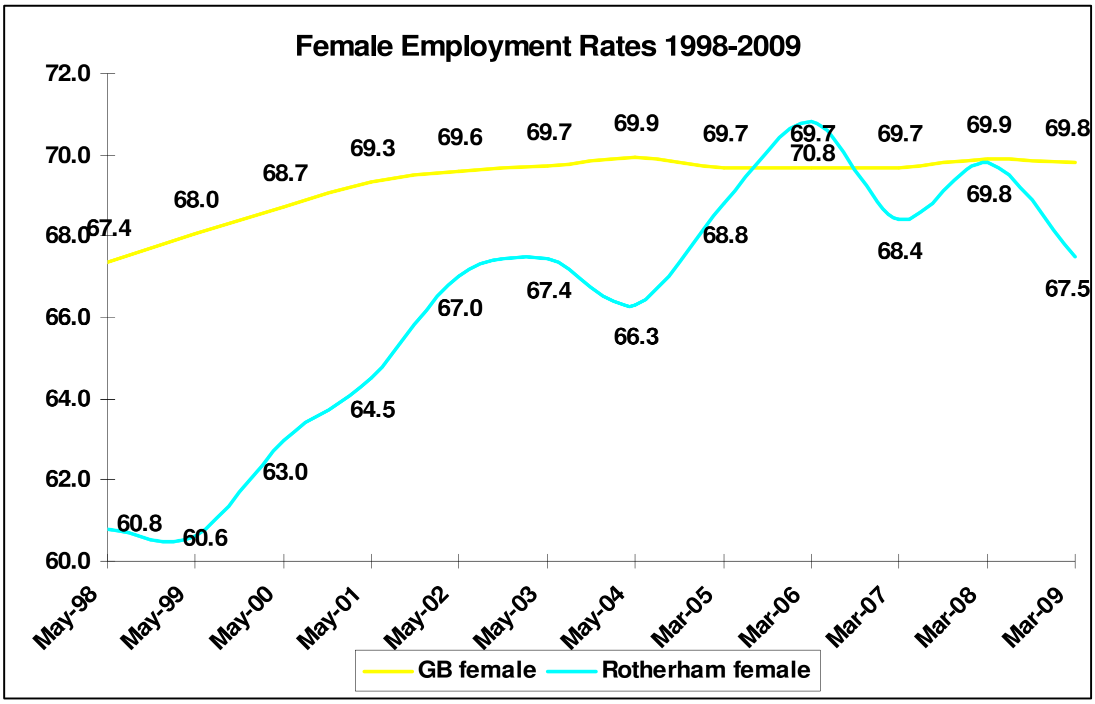
Source: NOMIS (LFS / APS)

Employment in Rotherham has fallen back from this high and the impact of the current recession can be clearly seen from 2008, with the employment rate now having fallen back to just below 70%.

The gap to the national average for male employment did close up until 2005 but the gap has again widened to around six percentage points -



Female employment in Rotherham followed a similar trend but since 2005 has performed better than males with only a slight fall back with the rate only 2.3 percentage points behind the national average –



Despite the overall increase in female employment women remain far more likely than men to be working part-time[9], with around 44% of Rotherham women employed on a part-time basis compared to just 11% of working age men in employment. This is also true nationally, although Rotherham has a slightly higher percentage of women working part-time compared to the national average.

Employment by Full-time / Part-time				
	Rotherham	South Yorkshire	Yorkshire & Humber	Great Britain
Percentage in employment working full-time	73.4%	73.7%	74.6%	75.8%
Percentage in employment working part-time	26.4%	26.0%	25.2%	24.0%
Percentage MALES in employment working full-time	88.7%	89.2%	88.9%	89.5%
Percentage FEMALES in employment working full-time	55.9%	54.9%	57.4%	59.3%
Percentage MALES in employment working part-time	11.1%	10.4%	10.8%	10.3%
Percentage FEMALES in employment working part-time	43.8%	45.0%	42.5%	40.6%
Source: NOMIS / APS June 2009 (totals may not agree due to roundings)				

Due to sample sizes the APS is limited in the amount of accurate analysis available for ethnic groups at the local authority level but it can provide a good estimate of comparative rates between a broad white / ethnic minority split. The estimated employment rate for ethnic minorities in Rotherham, using June 2009 data as an example, shows a gap of over 10 percentage points to the 'white' employment rate.

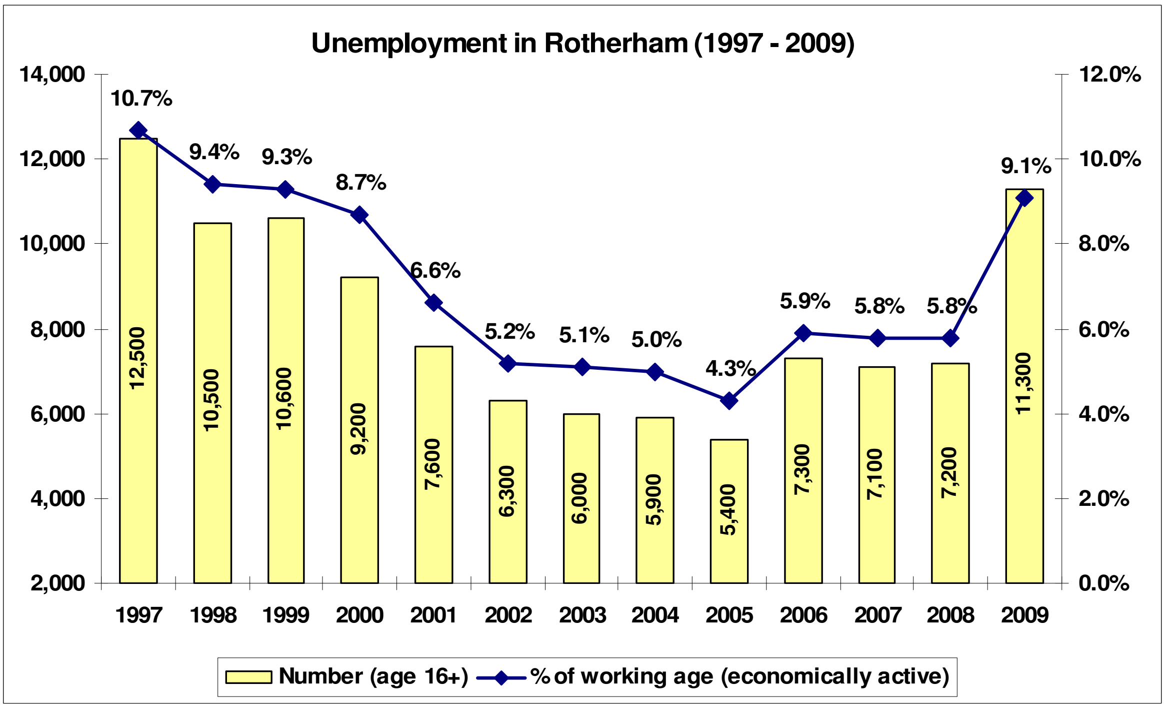
Employment Rates by Ethnic Groups - Male / Female	
working age employment rate - white	70.6%
working age employment rate - ethnic minority	59.8%
working age employment rate - white males	71.5%
working age employment rate - ethnic minority males	71.6%
working age employment rate - white females	69.6%
working age employment rate - ethnic minority females	45.2%
Source: NOMIS / APS June 2009	

However it is clear that the main factor in this gap is the very low rate of employment within ethnic minority females – whilst employment in ethnic minority males is in line with white males the employment rate of ethnic minority females is around 24 percentage points lower than their white counterparts.

[9] *Part-time defined as working 30 or fewer hours per week.*

Unemployment:

Unemployment[10] in Rotherham shows a similar pattern to the employment rate with strong improvement up until 2005 but a large increase since the start of the recession in 2008 -

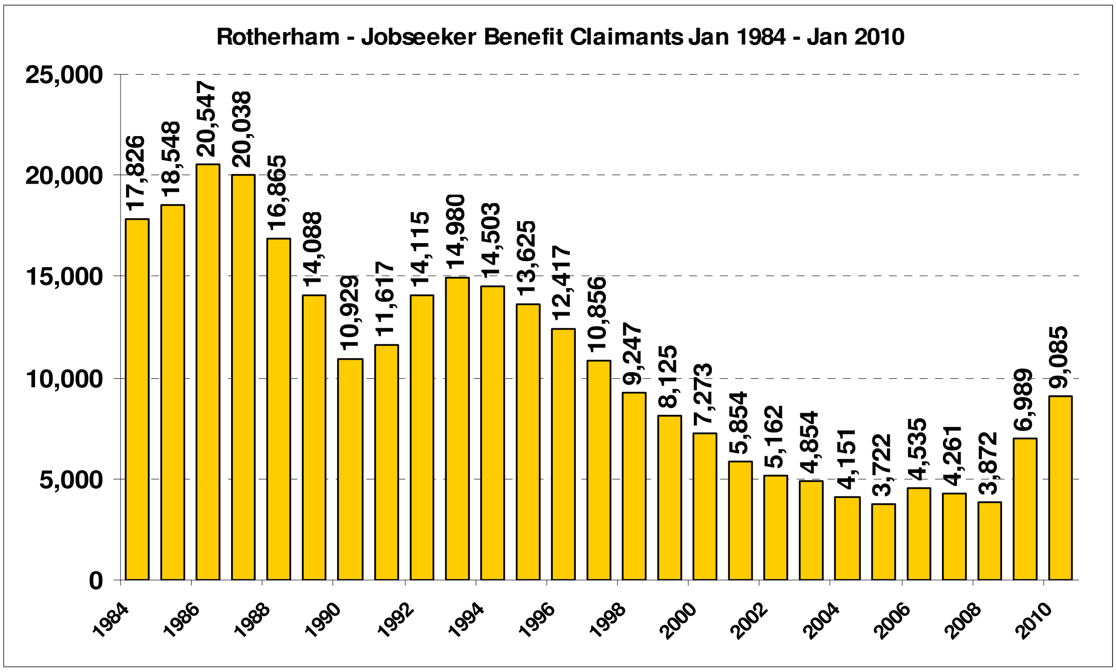


A narrower measure of unemployment is available by looking at the claimant count – i.e. the number of people that are claiming Job Seekers Allowance[11]. This is not 'true' unemployment as not everyone who is officially unemployed will be eligible or choose to claim this benefit and therefore this figure will always be lower than the actual unemployment rate. It does however have the advantage of being more accurate (i.e. it is based on actual records rather than a survey), is more up to-date and released on a monthly basis, and is also available at small area levels.

The long-term reduction in claimants since the mid-1980's can clearly be seen along with the significant increase over the last two years -

[10] *As recommended by the ONS numbers and percentages are taken from their model based estimates which are considered more reliable at a local authority level than those from the APS.*

[11] *JSA claimant count records the number of people claiming Jobseekers Allowance (JSA) and National Insurance credits at Jobcentre Plus local offices. People claiming JSA must declare that they are out of work, capable of, available for and actively seeking work during the week in which the claim is made.*



Source: NOMIS Claimants in January each year

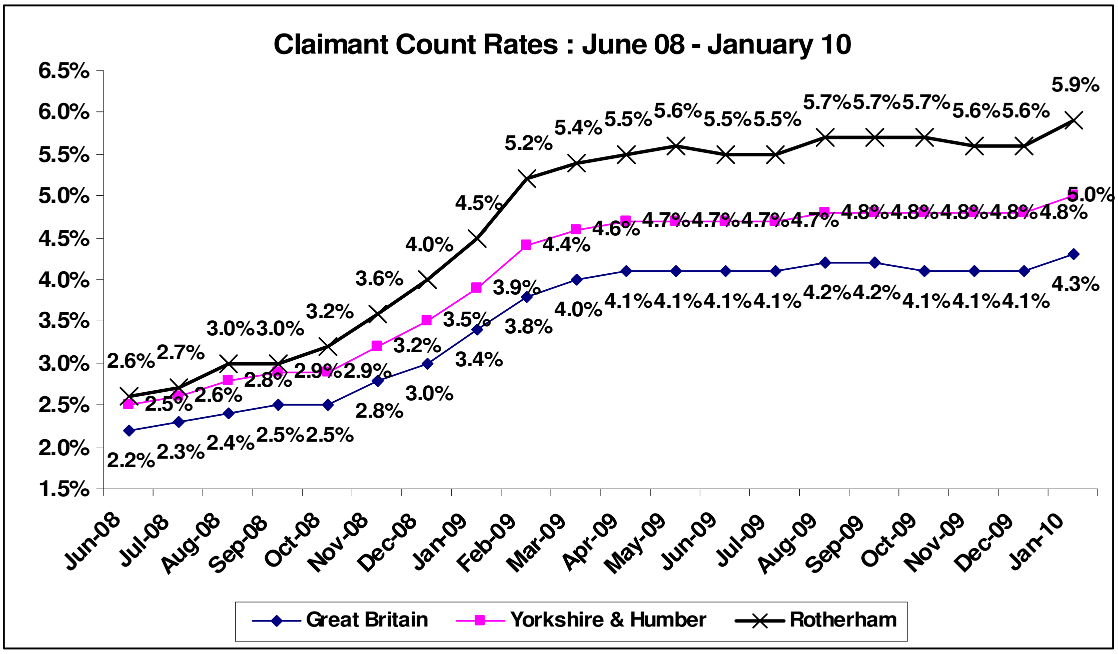
The recent increases since the beginning of the UK recession around the middle of 2008 is not confined to Rotherham with our adjoining authorities seeing similar levels of increase.

	June 2008		January 2010		Change:	
	Claimants	Rate	Claimants	Rate	Claimants	Rate
Barnsley	3,740	2.7%	7,714	5.6%	**+3,974**	**+2.9%**
Doncaster	5,164	2.9%	10,724	6.0%	**+5,560**	**+3.1%**
Rotherham	3,962	2.6%	9,085	5.9%	**+5,123**	**+3.3%**
Sheffield	8,537	2.5%	16,928	4.9%	**+8,391**	**+2.4%**
Total	21,403	2.6%	44,451	5.5%	**+23,048**	**+2.9%**

Source: NOMIS

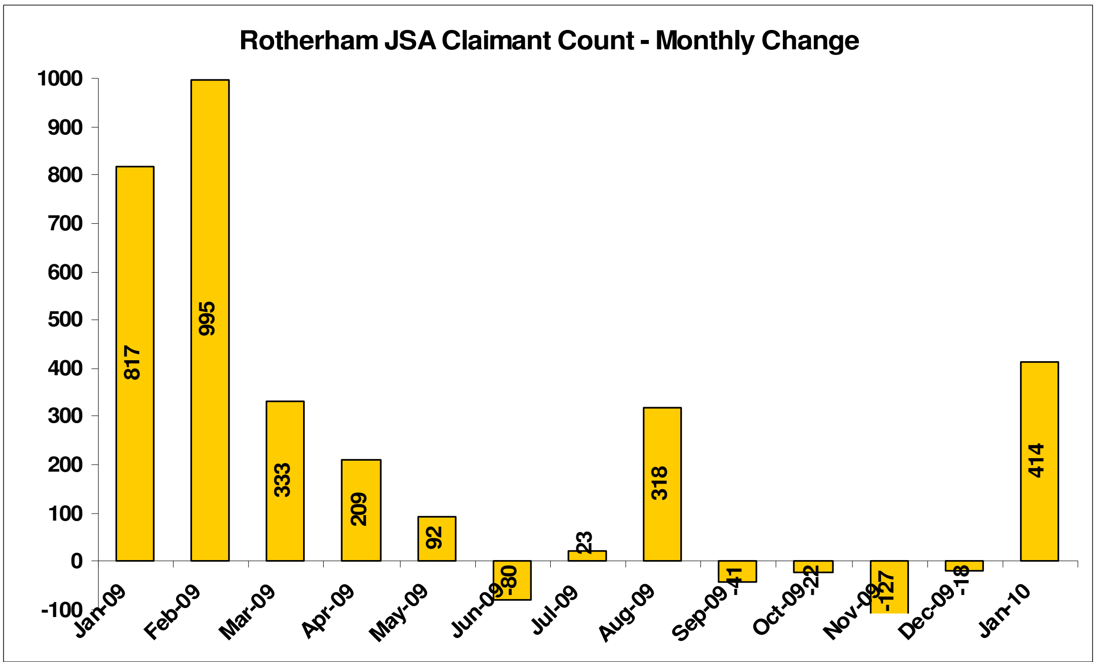
Rotherham, along with the rest of South Yorkshire, has seen relatively larger increases in the claimant count rate[12] compared to the regional and national increases – possibly due to the larger reliance on manufacturing (a sector particularly hard hit) for employment in the sub-region.

[12] *The percentage figures express the number of claimants resident in an area as a percentage of the working age population resident in that area. Working age is defined as 16-64 for males and 16-59 for females*



Source: NOMIS Claimant Count Rates

Hopefully the large increase in claimants seen in 2008 and the beginning of 2009 has come to an end – the latter part of 2009 has seen smaller monthly increases and some small falls, although unemployment is expected to continue to rise throughout 2010 whilst the country recovers from recession -



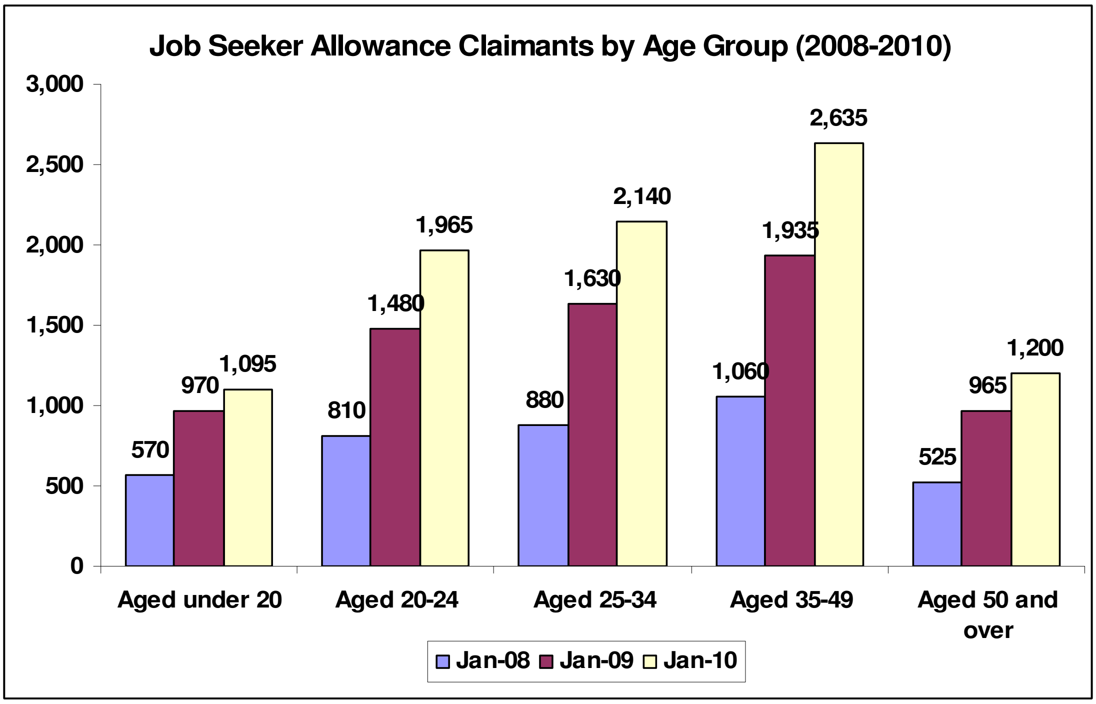
Claimant Analysis / Change:

Claimants can also be analysed by age group, duration of claim and at a small geography – the following looks at the changes that have taken place over the last two years 2008-2010 during one of the deepest recessions to impact on the UK economy.

The number of male claimants is around three times that of female claimants and the large increases over the last two years has not changed this balance. In percentage terms the increases for both sexes are similar although in actual numbers male claimants have increased by close to 3,900 whilst female claimants have increased by below 1,400.

	January 2008		January 2009		January 2010	
	Number	Rate	Number	Rate	Number	Rate
Male	2,983	3.7%	5,374	6.6%	6,841	8.4%
Female	889	1.2%	1,615	2.2%	2,244	3.0%
Source: NOMIS claimant counts 2008-10						

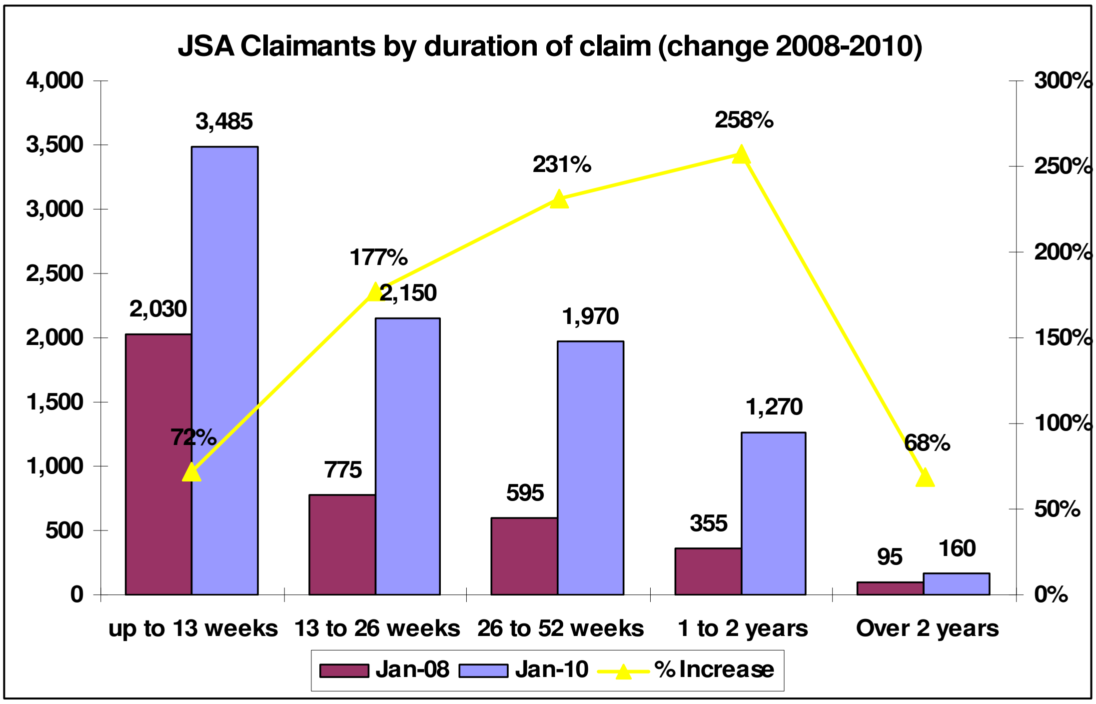
In Rotherham the increased claimants have been spread fairly evenly across all age groups – more than doubling in all but the under 20's.



Source: NOMIS, Claimant count by age and duration 2008-2010

In absolute terms the claimant numbers have increased mainly in people claiming the benefit for less than a year - this would be expected as people freshly made unemployed are usually more closely connected to the labour market, are likely to have stronger appeal to employers and usually are better equipped to take advantage of vacancies than longer term unemployed.

However it is especially concerning that the percentage of claimants claiming Job Seekers Allowance benefit for over a year has increased substantially; by almost 1,000 in the two year period, or over 200%.

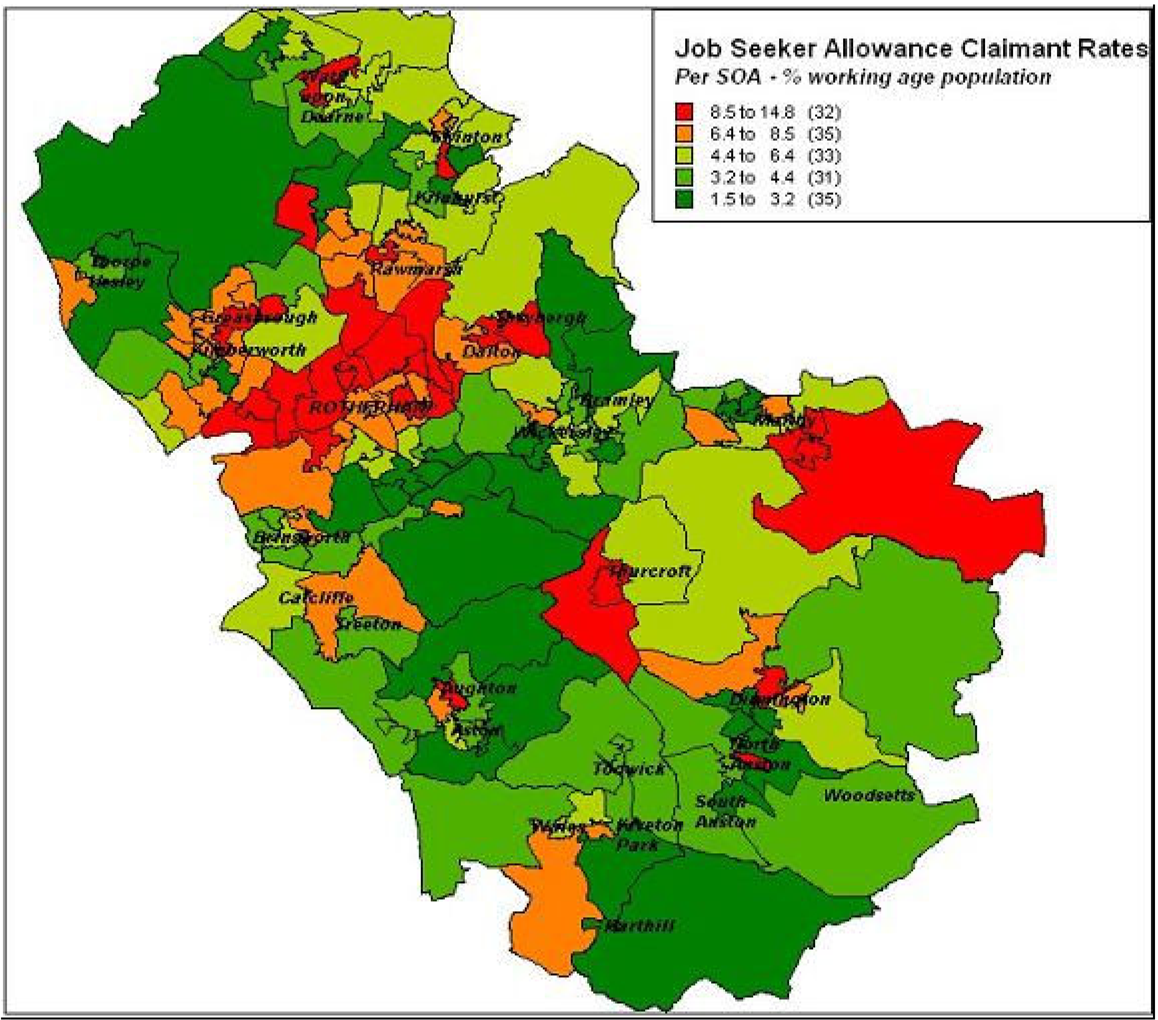


Source: NOMIS, Claimant count by age and duration 2008-2010

The difficult facing the unemployed is highlighted by a decrease in the number of unfilled jobcentre vacancies resulting in a large rise in the rate of JSA claimants per unfilled vacancy, although this has dropped slightly for 2010 compared to the previous year -

JSA Claimants per unfilled jobcentre vacancy			
Date:	**Rotherham**	**Yorkshire & Humber**	**Great Britain**
January 2008	1.9	2.9	2.7
January 2009	15.6	10.4	6.4
January 2010	11.7	9.6	8.5
Source: Jobcentre Plus vacancies			

Whilst the overall claimant rate of 5.9% (as at January 2010) is just 1.6 percentage points above the national average the rate fluctuates considerably across the borough – the rates across the 166 Super Output Areas (SOA's) varies between as low as 1.5% to as high as 14.8%. The map below illustrates the spread of claimants with concentrations chiefly around the town centre but also other pockets in outlying areas of the borough.



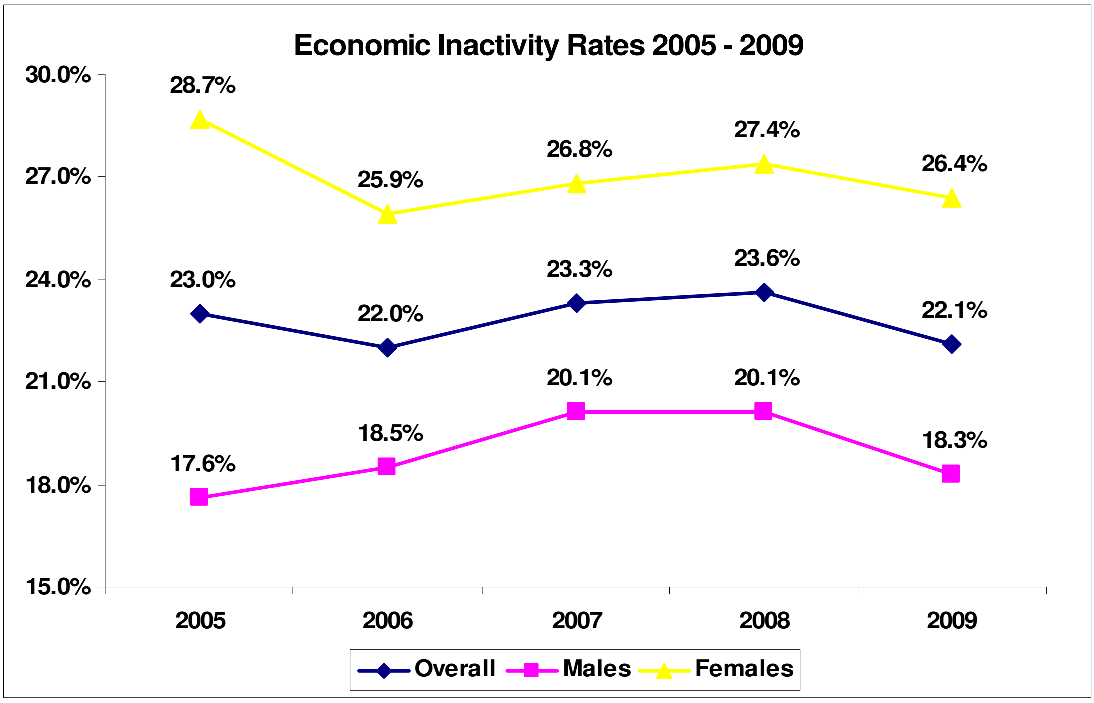
Source: NOMIS/DWP Claimant Counts (January 2010)

Economic Inactivity:

Unemployment and / or claimant count data only gives a partial picture of the scale of worklessness within an area – rates of economic inactivity[13] are considerably higher. People can be economically inactive (i.e. not working and not actively looking for work) for a number of reasons including long-term sickness, acting as carers, students, etc. or simply not wanting a job.

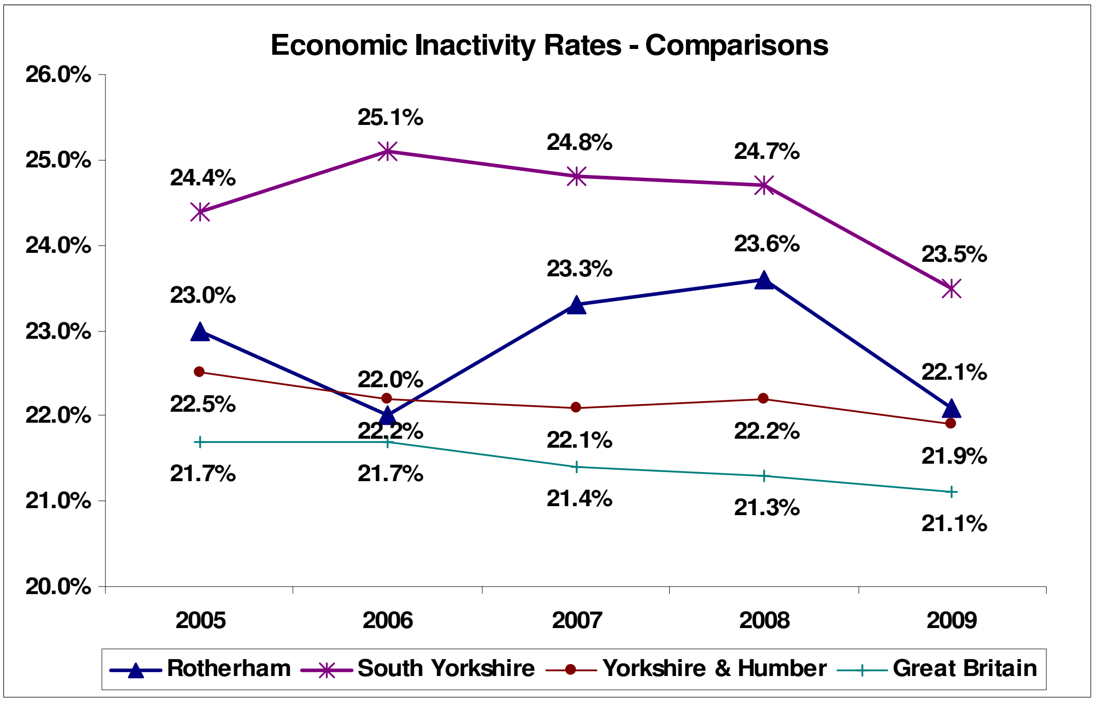
The trend in estimated economic inactivity in Rotherham has generally been downward over the long-term, particularly for females, although the last few years the overall rate has been relatively stable – generally between 22%-23% of the working age population. Female inactivity has tended to fall more in comparison to males – a result of higher numbers of females entering the labour market / taking up employment over recent years – although the gap remains substantial.

[13] *People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.*



Source: NOMIS APS March 2005-2009

Economic inactivity in Rotherham has consistently been below the South Yorkshire average over recent years and close to the regional average.

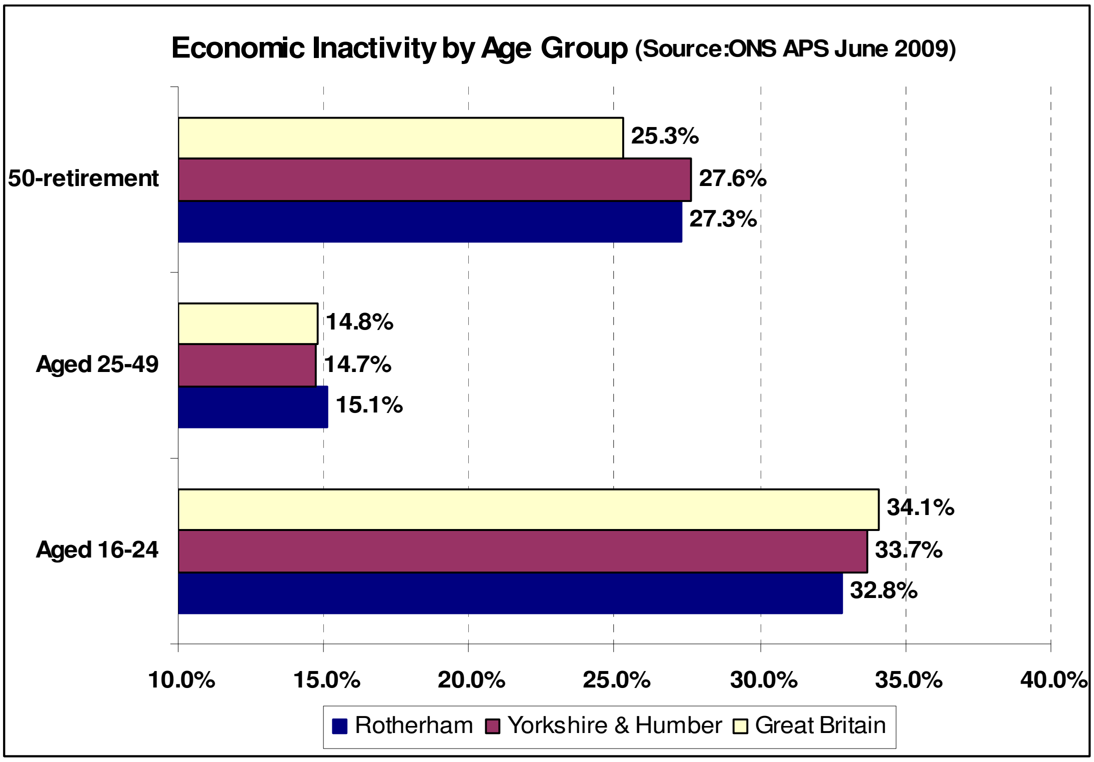


Source: NOMIS APS March 2005-2009

Whilst the percentages for ethnic minority groups are subject to a relatively large degree of variance, particularly at a district level, it is clear that they have a higher rate of economic inactivity (this is particularly true of ethnic minority females) than the 'white' population.

% Working age economically inactive:	All		Male		Female	
	White	Ethnic	White	Ethnic	White	Ethnic
Great Britain	19.5%	32.5%	15.9%	22.7%	23.6%	42.3%
Yorkshire & Humber	20.4%	37.6%	16.9%	24.7%	24.3%	50.2%
South Yorkshire	22.0%	33.1%	17.8%	22.9%	26.6%	44.2%
Rotherham	20.1%	38.6%	17.0%	28.4%	23.5%	51.1%
Source: NOMIS APS (June 2009)						

Economic inactivity in Rotherham tends to be lower in the younger age group, which may reflect the lower percentage of young people in Rotherham entering further education, but tends to be higher in the over 50 age groups .



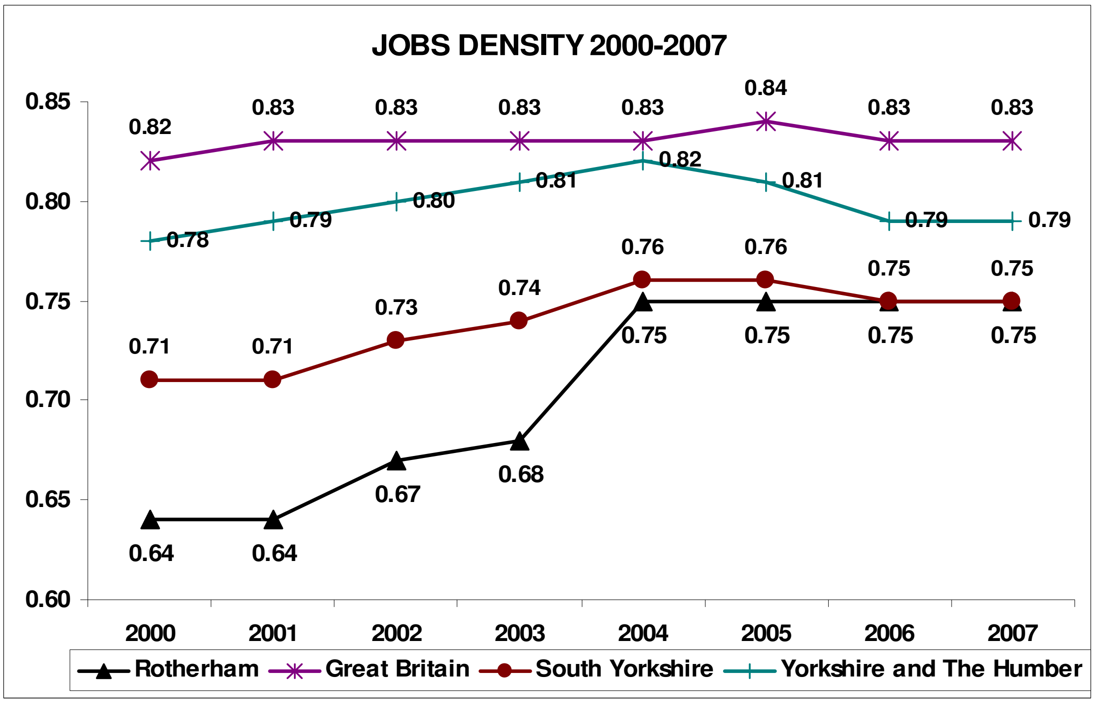
There is a great disparity in the proportion of the economically inactive population who want / do not want a job. In Rotherham of the 33,100 working age population who are classed as economically inactive just 7,600 (23.1%) stated that they actually want a job – below the South Yorkshire and regional / national average.

2008/09 (%)							
Great Britain	Yorkshire & Humber	South Yorkshire	Barnsley	Doncaster	**Rotherham**	Sheffield	**Inactive - category**
26.4	26.0	26.8	25.3	32.4	**23.1**	26.1	Want a job
73.6	74.0	73.2	74.7	67.6	**76.9**	73.9	Does not want a job
27.4	28.3	29.9	22.8	35.3	**21.6**	34.0	Males wanting a job
72.6	71.7	70.1	77.2	64.7	**78.4**	66.0	Males not wanting a job
25.6	24.4	24.6	27.2	30.7	**24.3**	19.9	Females wanting a job
74.4	75.6	75.4	72.8	69.3	**75.7**	80.1	Females not wanting a job
Reason for not wanting a job:							
0.5	0.2	!	!	!	**!**	!	Not looking - Discouraged
7.6	6.6	8.2	9.1	13.0	**7.7**	5.5	Not looking - Long-term sick
6.5	6.5	7.0	6.6	7.5	**5.6**	7.5	Not looking - Looking after home/family
4.3	4.6	3.8	4.9	4.6	**1.8**	3.8	Not looking - Student
4.3	4.4	4.5	1.4	4.8	**3.2**	6.3	Not looking - Other
Source: NOMIS APS (June 2009); ! = Estimate not available (sample size is zero or disclosive)							

Those who are economically inactive and would want a job have various reasons for not looking – the most common in Rotherham long-term sickness and looking after home / family which account for around two-thirds of the total, similar to the rest of South Yorkshire.

Jobs Density

In addition to available vacancies jobs density[14] is also an indictor of labour demand – this measures the numbers of jobs per resident of working age (16-59/64). For example, a job density of 1.0 would mean that there is one job for every resident of working age. The chart below highlights how the strong jobs growth in Rotherham up to 2004 has impacted on closing the gap to the regional and national job density rates although it shows no growth in the latest three years available.



Source: ONS Jobs Density

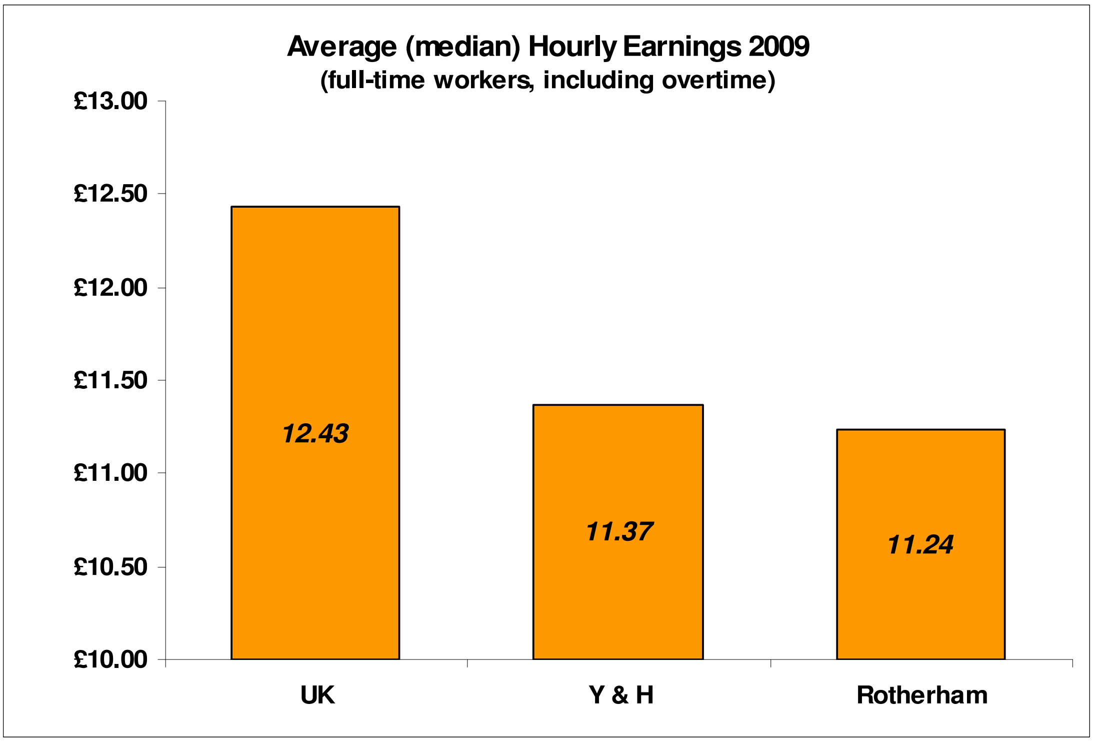
Job Density in South Yorkshire (2000-2007)				
Year:	**Barnsley**	**Doncaster**	**Rotherham**	**Sheffield**
2000	0.62	0.67	0.64	0.80
2001	0.59	0.67	0.64	0.81
2002	0.63	0.68	0.67	0.82
2003	0.63	0.69	0.68	0.85
2004	0.64	0.71	0.75	0.85
2005	0.62	0.73	0.75	0.85
2006	0.59	0.74	0.75	0.82
2007	0.59	0.73	0.75	0.82
Source: ONS Jobs Density				

[14] *The total number of jobs is a workplace-based measure and comprises employee jobs, self-employed, government-supported trainees and HM Forces. The number of working age residents figures used to calculate jobs densities are based on the relevant mid-year population estimates.*

Earnings:

The relative level of earnings in an area can be one sign of a strong economy and labour market - earnings data is available from the ONS Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed and all information relates to a pay period in April. Average earnings are usually reported using the median[15], which is considered a more accurate measure for comparison as in areas such as Rotherham with relatively few very high earners the use of a mean average can skew the data.

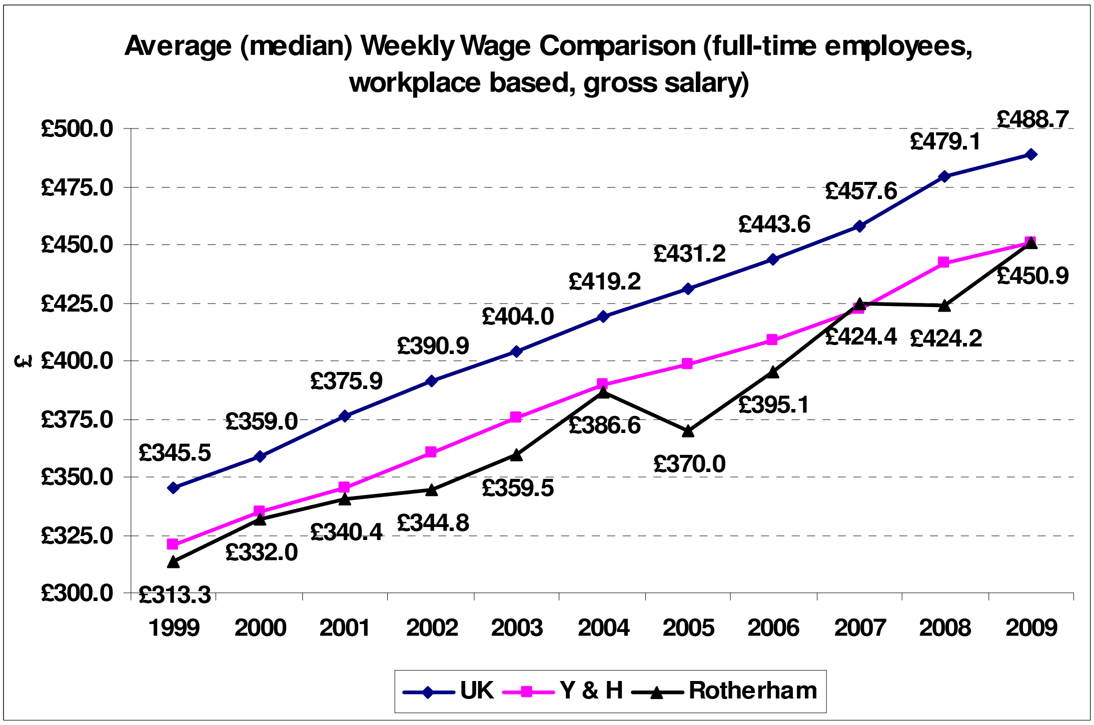
Earnings data is available either workplace based – i.e. earnings of all employees working within the borough, or residence based – i.e. earnings of all employed population living in the borough. The following analysis focuses primarily on workplace based earnings –



Source: ONS - ASHE 2009

Median average hourly earnings (for full-time workers including overtime) in Rotherham for 2009 were £11.24 compared to £11.37 regionally and £12.43 nationally. It should be noted that as this data is survey based the figures will naturally vary from year to year and it is the longer term trend which is important. Looking at weekly workplace earnings (National Indicator NI 166) it can be seen that the gap between local and regional / national wage levels has remained at a roughly similar level –

[15] *The median is the value below which 50 per cent of employees fall.*



Source: ONS - ASHE 2009

Comparing figures for annual workplace earnings shows the same pattern with Rotherham averaging close to 90% of the UK average in most years (around 97% of the regional average).

Median (Annual) gross pay for full-time employees - workplace based.											
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
UK	£17,803.0	£18,848.0	£19,722.0	£20,376.0	£21,124.0	£22,056.0	£22,888.0	£23,367.0	£24,043.0	£25,165.0	£25,816.0
Y&H	£16,527.0	£17,503.0	£18,270.0	£18,863.0	£19,659.0	£20,433.0	£21,506.0	£21,674.0	£22,307.0	£23,357.0	£23,904.0
Rotherham	£16,376.0	£17,517.0	£18,110.0	£18,235.0	£18,250.0	£19,940.0	£20,914.0	£19,950.0	£21,655.0	£22,227.0	£23,727.0
Rotherham v UK	***92.0%***	***92.9%***	***91.8%***	***89.5%***	***86.4%***	***90.4%***	***91.4%***	***85.4%***	***90.1%***	***88.3%***	***91.9%***

Historically the earnings of Rotherham's employed population have been above the level of the earnings of employees working within Rotherham (as people from Rotherham take advantage of higher earnings in workplaces outside the borough, particularly from Sheffield). This gap has shrunk over recent years and workplace / residence based earnings are now broadly at similar levels – an indication that higher paid jobs have been created in Rotherham.

	2002	2003	2004	2005	2006	2007	2008	2009
Workplace based earnings	£344.8	£359.5	£386.6	£370.0	£395.1	£424.4	£424.2	£450.9
Residence based earnings	£364.3	£375.6	£385.9	£385.4	£398.2	£422.0	£424.8	£440.4
Source: ONS - ASHE workplace/residence based median earnings								

Rotherham's median weekly wage is similar to Barnsley / Doncaster but slightly below Sheffield (£525.7) which would be expected to be higher due to being a larger / city economy which tends to attract more highly paid professional jobs.

Occupations:

There are some clear differences in terms of occupations of those in employment when comparing Rotherham with regional and national occupations (using SOC2000 from the APS). Rotherham has a lower percentage of employees in managerial / professional roles than regionally or nationally – a 6.6 percentage point gap to the Great Britain average, equivalent to over 7,000 fewer employees in these occupations.

Conversely Rotherham has a higher percentage[16] than the regional and national averages in the process/plant/machine operatives and elementary occupations (SOC 8-9) and personal services / sales and customer service occupations (SOC 6-7).

Employment by Standard Occupational Code					
	Rotherham		South Yorkshire	Yorks & Humber	Great Britain
1.Managers and senior officials	15,400	13.7%	13.0%	14.1%	15.6%
2.Professional	12,100	10.7%	11.0%	11.9%	13.4%
3.Associate professional & technical	14,400	10.7%	13.8%	13.3%	14.7%
Total SOC Major Group 1-3	**41,900**	**37.3%**	**37.9%**	**39.5%**	**43.9%**
4.Administrative and secretarial	10,900	9.6%	11.7%	11.3%	11.3%
5.Skilled trades	12,000	10.6%	10.6%	10.9%	10.6%
Total SOC Major Group 4-5	**22,800**	**20.3%**	**22.4%**	**22.3%**	**22.0%**
6.Personal service	11,900	10.6%	9.1%	8.9%	8.4%
7.Sales and customer services	10,000	8.9%	8.7%	7.7%	7.5%
Total SOC Major Group 6-7	**21,900**	**19.5%**	**17.9%**	**16.7%**	**15.9%**
8.Process plant & machine operatives	11,800	10.5%	8.7%	8.4%	6.9%
9.Elementary	13,800	12.3%	12.8%	13.0%	11.3%
Total SOC Major Group 8-9	**25,600**	**22.8%**	**21.6%**	**21.5%**	**18.2%**
Source: NOMIS / Annual Population Survey June 2009 (totals may not agree due to roundings)					

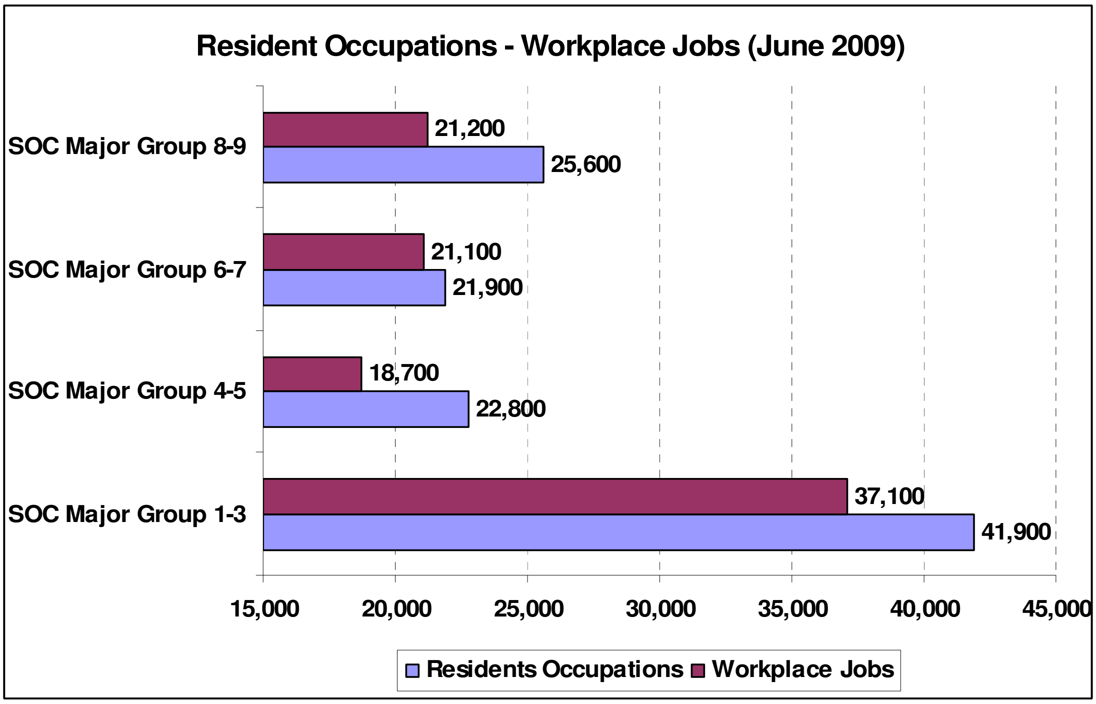
This is a reflection of many factors - the lower than average skills levels within Rotherham and also the types of jobs available in the local economy which feeds through into lower salaries. This is a serious weakness in the local economy given the predictions that employment opportunities within the lower skilled occupations will continue fall and new job creation is likely to be in professions / industry requiring higher skills.

This process is already taken place as shown by the change in the last 5 years – the percentage employed in the higher skilled occupations (SOC1-3) in Rotherham has increased by over seven percentage points with employment in SOC8-9 falling by four percentage points.

Change in Standard Occupational Code		
	2004	**2009**
SOC Major Group 1-3	29.7%	37.3%
SOC Major Group 4-5	25.3%	20.3%
SOC Major Group 6-7	18.2%	19.5%
SOC Major Group 8-9	26.8%	22.8%
Source: NOMIS / Annual Population Survey		

[16] *Numbers and % are for those of 16+, % is a proportion of all persons in employment*

All the above is looking at occupations of Rotherham residents but we can also compare with occupations by workplace in Rotherham.



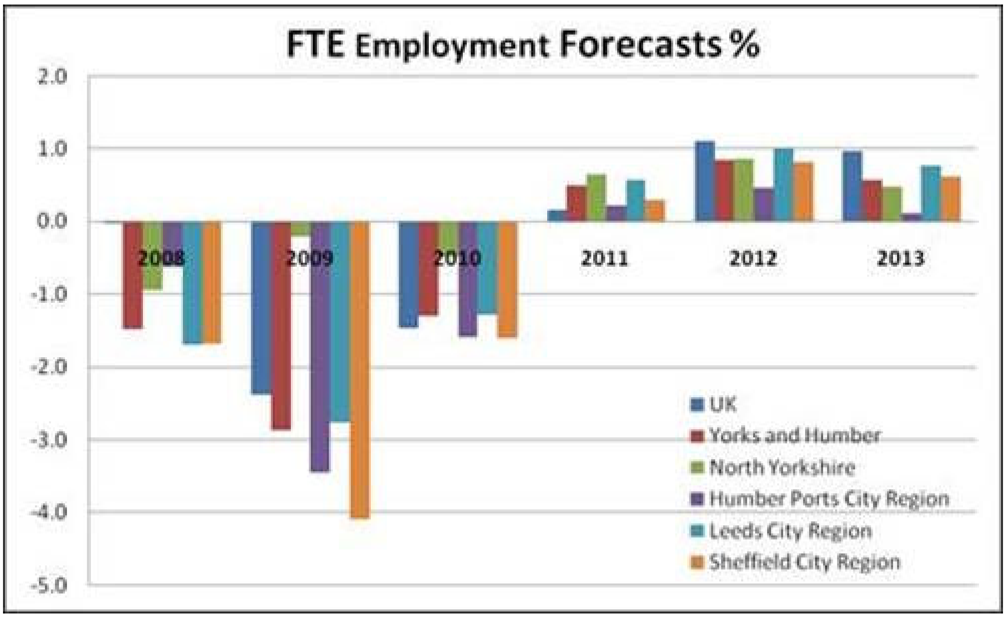
Source: NOMIS Annual Population Survey Residence/Workplace datasets June 2009

This highlights a shortage of jobs in Rotherham in the higher skilled occupations SOC1-5, suggesting that people in Rotherham are travelling outside the borough to take up these positions. There also appears to be a shortage of jobs in the lowest skilled occupations (SOC8-9) and as employment in these occupations is predicted to continue to fall it is likely that Rotherham residents will need to up-skill / re-train to keep within the jobs market.

Employment Projections:

Since 2001, Yorkshire Forward has been working with Experian Business Strategies Ltd to develop their own Regional Econometric Model (REM). Whilst the uncertainties in the wider global economy make economic forecasting difficult, the forecasts in the REM remain the most robust and reliable assessments of key economic variables at the Regional and Sub Regional Level. The forecasts are updated every quarter to ensure that the figures capture events occurring in the economy as quickly as possible. Figures below are from the spring 2010 update of the model which includes data from the results of the latest Annual Business Inquiry 2008. *All figures from 2009 onwards are therefore estimates.*

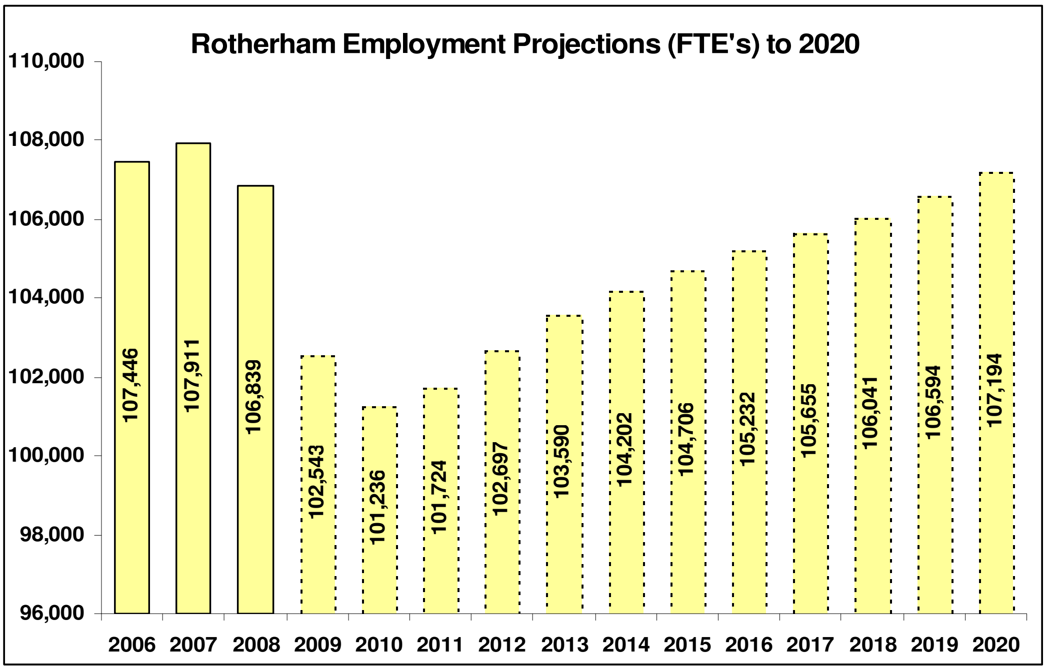
At the regional level employment levels began falling in 2008 and job losses hit a peak during 2009, with the Sheffield City Region being the hardest hit – partly due to its heavier reliance on the manufacturing sector as a share of its employment, a sector which has been particularly hard hit in the recent recession.



Source: Yorkshire Forward / Experian Regional Econometric Model

Employment is predicted to continue falling over the course of 2010, despite some modest growth in output, although the rate of fall is expected to reduce / not be so severe as in 2009. Employment growth is not expected to begin until 2011 but at a very low rate, with a slight acceleration in 2012 – again growth in the Sheffield City Region is predicted to lag behind the UK rate and slightly behind the regional average over the next three years.

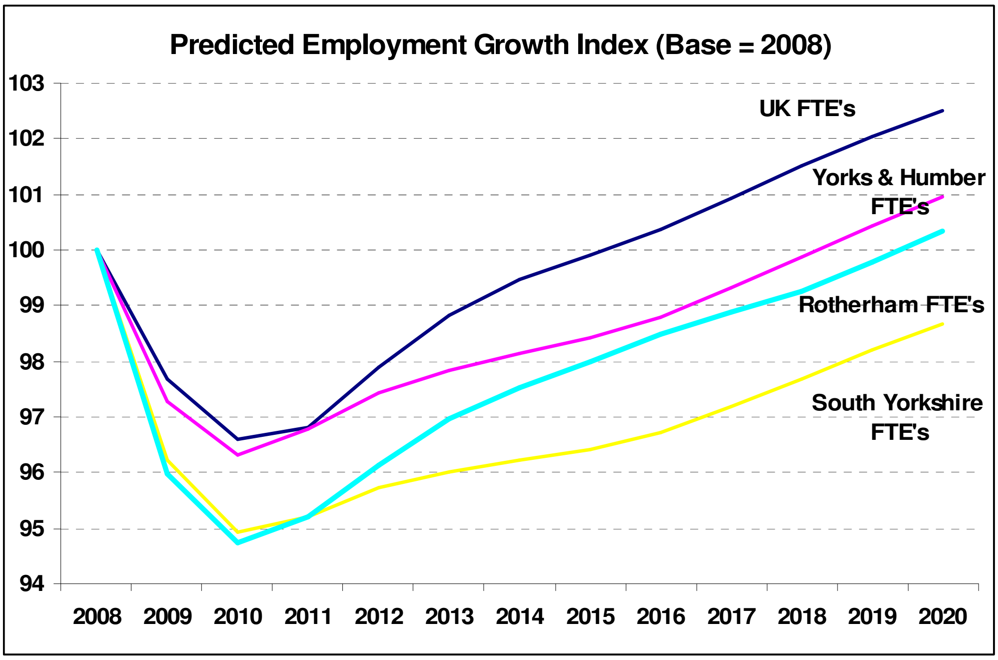
The chart below compares projected employment growth in Rotherham from 2008 (the last actual figure) out to 2020 –



Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

It is clear that the level of workplace employment within Rotherham had already begun to fall from 2007 to 2008 as the recession started during the middle part of 2008. Projections show a sharp fall for 2009 and another, smaller fall, during 2010 with only a very small improvement for 2011. Projections beyond this are liable to ever greater reliability / confidence issues but they suggest that Rotherham will not recover to pre-recession levels in the number of people employed in the borough until around 2020.

Rotherham is not alone in facing a slow recovery, comparative rates of improvement in employment up to 2020 are shown below –



Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

The impact of the recession on Rotherham in the short-term has been more severe than the average seen nationally or regionally and the longer-term recovery in employment, whilst being above the South Yorkshire average, is not predicted to fully close this gap.

In the short-term it is the manufacturing sectors that will see the biggest job losses -

Predicted Job Losses (FTE) per Sector 2008 to 2011				
	2008	2011	Change	
Agriculture, Mining, Utilities	1,700	1,600	-100	-5.9%
Metals, Minerals & Chemicals	7,300	6,100	-1,200	-16.4%
Engineering	4,200	3,400	-800	-19.0%
Other Manufacturing	5,600	5,300	-300	-5.4%
Construction	11,100	9,900	-1,200	-10.8%
Distribution, Hotels & Catering	19,400	19,500	100	0.5%
Transport & Communications	6,500	6,900	400	6.2%
Financial & Business Services	20,000	18,100	-1,900	-9.5%
Other (mainly public) Services	30,900	31,000	100	0.3%
Source: YF / Experian, REM April 2010				

All manufacturing including metals and engineering are expected to see substantial job losses (these sectors[17] have also been hit hard at the national level) along with construction, another important sector in Rotherham. Financial and business services will also shed jobs in the short-term; this has already been seen with job losses announced at several call centres based in Rotherham. Employment within the public sector is also expected to be cut over the next few years as government spending is curtailed in response to the large public sector deficit.

In the longer-term job losses in the manufacturing sector will continue, particularly in the lower skilled / low value basic manufacturing sectors –

Long-term Predicted Job Changes (FTE) per Sector 2008 to 2020				
	2008	**2020**	**Change**	
Agriculture, Mining, Utilities	1,700	1,200	-500	-29.4%
Metals, Minerals & Chemicals	7,300	6,200	-1,100	-15.1%
Engineering	4,200	3,600	-600	-14.3%
Other Manufacturing	5,600	4,400	-1,200	-21.4%
Construction	11,100	12,000	900	8.1%
Distribution, Hotels & Catering	19,400	20,200	800	4.1%
Transport & Communications	6,500	7,100	600	9.2%
Financial & Business Services	20,000	21,000	1,000	5.0%
Other (mainly public) Services	30,900	31,400	500	1.6%
Source: YF / Experian, REM April 2010				

The construction sector is predicted to recover and will employ more people by 2020 than pre-recession. The Financial and Business Services sector is also expected to recover over the longer-term to become the second most important sector (after the public sector) in terms of employment.

All these forecasts are based on 'policy-off' expectations – i.e. on a pure trend basis given the current sectoral make-up of the local economy. Forecasts would change in a 'policy-on' scenario where Rotherham could attract additional investment, for example through EU funding. This has happened in the past, for example with Objective 1 funding, which resulted in large scale inward investment / regeneration and the attraction of businesses to relocate in the area – this boosted employment above the level which would normally have been expected. The level of any future large-scale investment is unknown but given the current tight financial constraints any public investment is likely to be more modest in nature for the foreseeable future.

[17] *For this analysis 10 broad sectors from the REM have been used – Agriculture, Forestry & Fishing + Mining and Utilities have been combined for Rotherham due to the relatively small numbers in these sectors.*

Employment: Key Issues

Employment Rate
- The current recession has resulted in the employment rate gap to the national average again widening – Rotherham needs around 4,000 extra people in employment to close the gap.
- The gap to the national average is greater for males than females

Unemployment
- Over 11,000 people in Rotherham unemployed, more than double the pre-recession figure
- Sluggish economic recovery predicted for the UK could result in unemployment levels struggling to improve in the near future
- Job Seeker Allowance claimant rates over 14% in some parts of the borough with males hardest hit
- Over 3,000 JSA claimants are young people (24 or under)
- Large increase in long-term unemployed with over 1,400 claiming JSA for over a year

Economic Inactivity
- Overall inactivity rates similar to the region but higher within ethnic groups, particularly female ethnic groups
- Most common reason for economic inactivity is long-term sickness or looking after home/family, accounting for a third of the total

Earnings
- Earnings of workplace employees in Rotherham close to the regional average but consistently around 90% of the national average
- Workplace and residence based earnings now broadly at similar levels

Occupations
- Lower percentage of residents in Rotherham working in the higher skilled managerial / professional occupations than the national average
- Higher percentage of residents working within the lower skilled, elementary occupations

Projections
- Workplace employment is predicted to continue falling until the end of 2010 with only a small recovery starting in 2011
- Recession will impact more heavily on Rotherham than the UK / regional average and it will be a struggle to close this gap in the future
- In the long-term employment within manufacturing sectors (particularly low-skilled / basic) is expected to decline, with an increase in the financial and business services sector

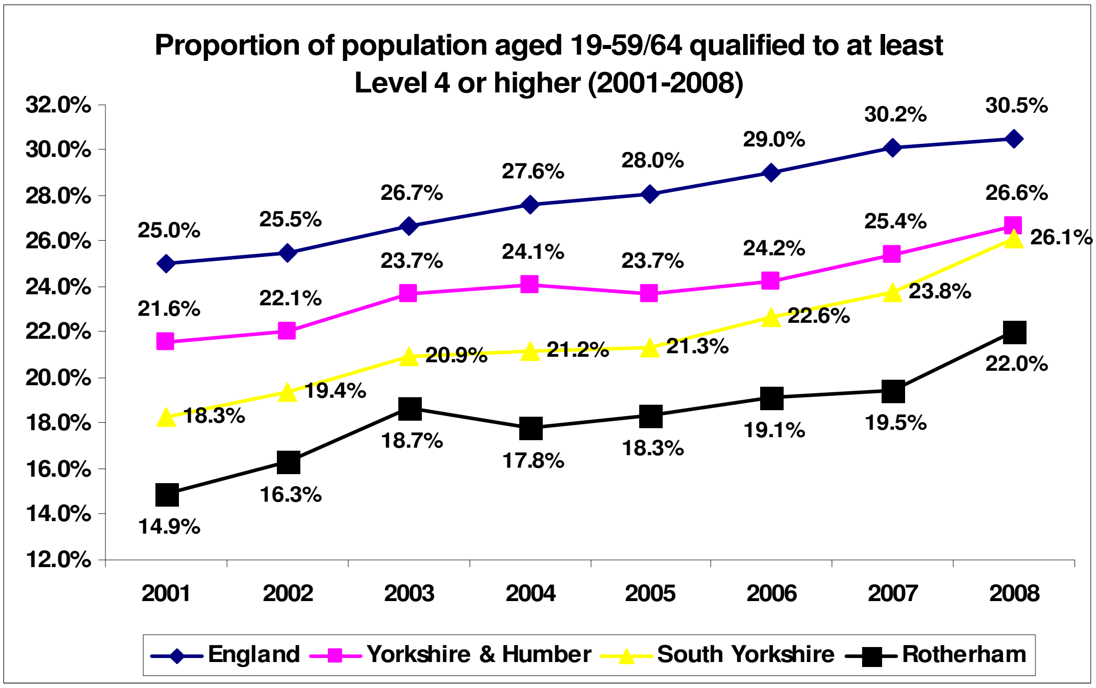
SKILLS

Skills levels, including educational attainment, are key indicators in identifying existing and potential skills gaps, both for local employers and inward investors. The recent recession has highlighted the pressure on 'old' labour intensive / elementary occupations which are forecast to continue their decline due to increasing pressure from overseas low skilled / low wage economies.

The continuing evolvement of the UK economy to a service sector and high-tech manufacturing orientated economy requires a skilled workforce and Rotherham must ensure that its own workforce is equipped to take advantage of expansion in these areas and to attract inward investment. Developments such as the Advanced Manufacturing Park at Waverley require a highly skilled workforce – if local people do not have the necessary skills then new job creation are likely to be taken by workers from outside the borough or companies will choose to invest elsewhere.

NVQ Levels

Rotherham has traditionally had a comparatively lowly skilled workforce, due in part to its past reliance on traditional heavy industries such as steel and coal. There has been substantial improvement over recent years with 22% of the working age population[18] being qualified to at least NVQ Level 4 (e.g. a degree) or above in 2008, compared to less than 15% in 2001.



Source: DIUS from LFS/APS: Qualification levels of the 19-59/64 Population (2001-2008)

The gap to the national and regional averages has been closed but remains substantial – Rotherham would need an additional 7,000 people up-skilled to

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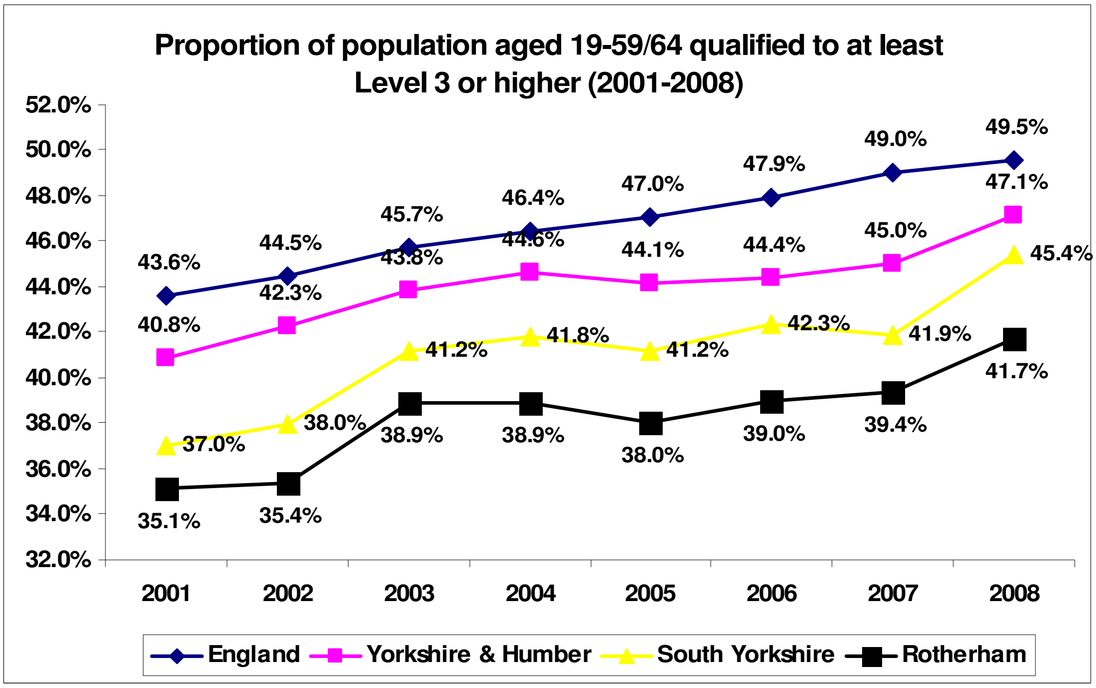
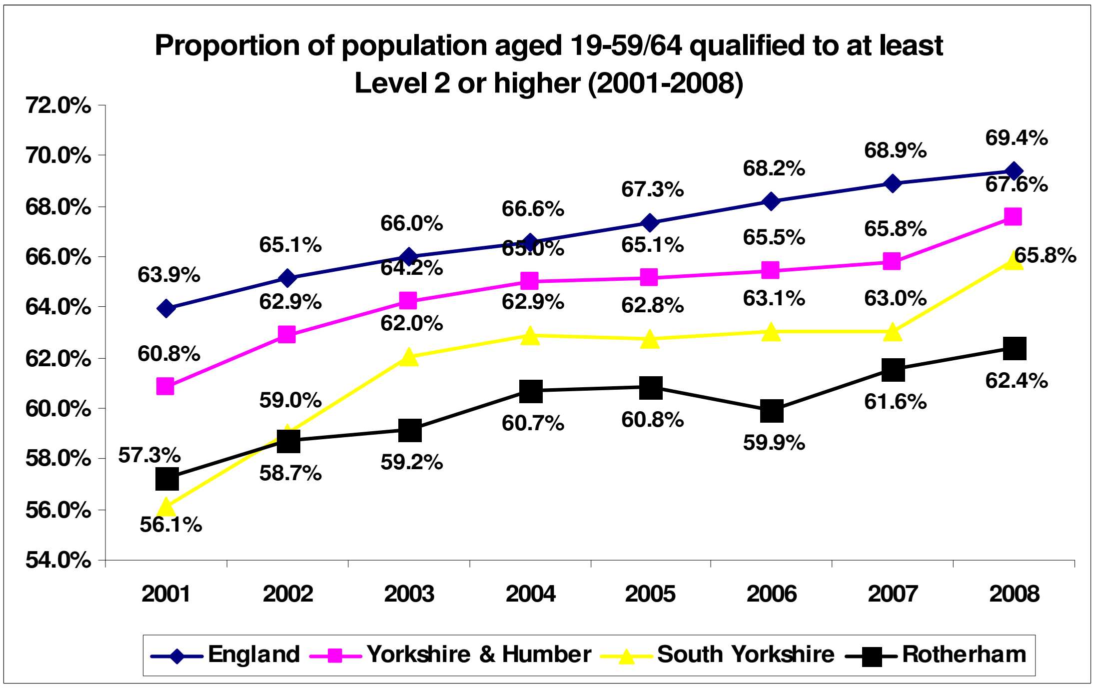
[18] For this measure working age is defined as 19-59F/19-64M age groups

NVQ4+ to reach the regional average and an additional 12,000 to reach the average for the whole of England.
There have also been improvement in performance at the lower levels of qualifications but the gap with the national and regional averages has narrowed only slightly – comparisons of those qualified to at least Level 3[19] or higher and to at least Level 2[20] are shown below:



Source: DIUS from LFS/APS: Qualification levels of the 19-59/64 Population (2001-2008)



Source: DIUS from LFS/APS: Qualification levels of the 19-59/64 Population (2001-2008)

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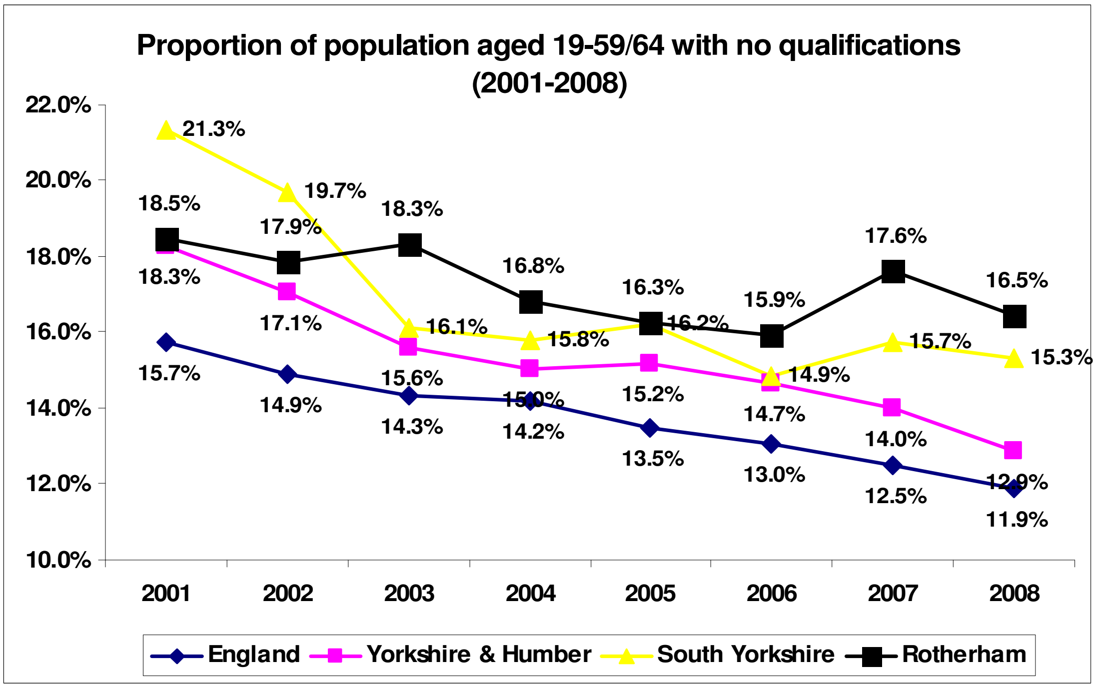
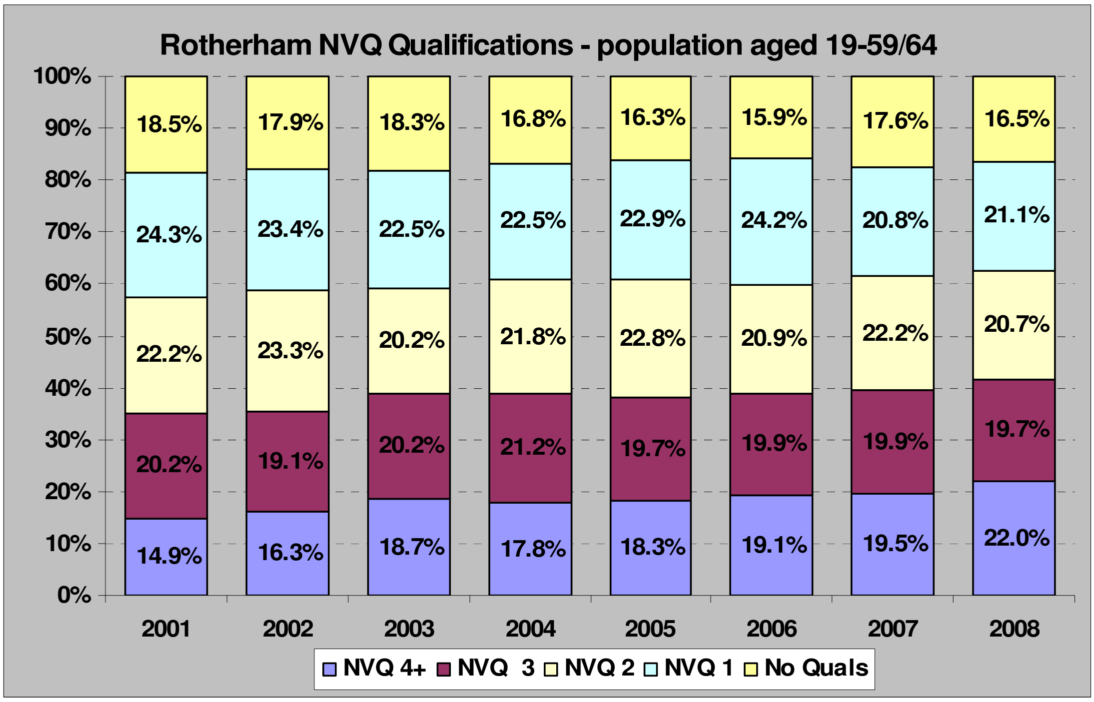
[19] *Level 3 if achieved at least 2 A levels grades A-E, 4 A/S levels graded A-E, or any equivalent (or higher) qualifications in the Qualifications and Credit Framework.*
[20] *Level 2 if achieved at least 5 GCSEs grades A*-C, two A/S levels, or equivalent*

Rotherham would need an additional 7,500 people up-skilled to NVQ2 or more to reach the regional average and an additional 11,000 to reach the average for the whole of England.

Rotherham has reduced the numbers of people without qualifications but despite this the gap to the national and regional average has increased – Rotherham has 5,000 more people without qualifications than if at the regional average, 7,000 more than if at the England average.



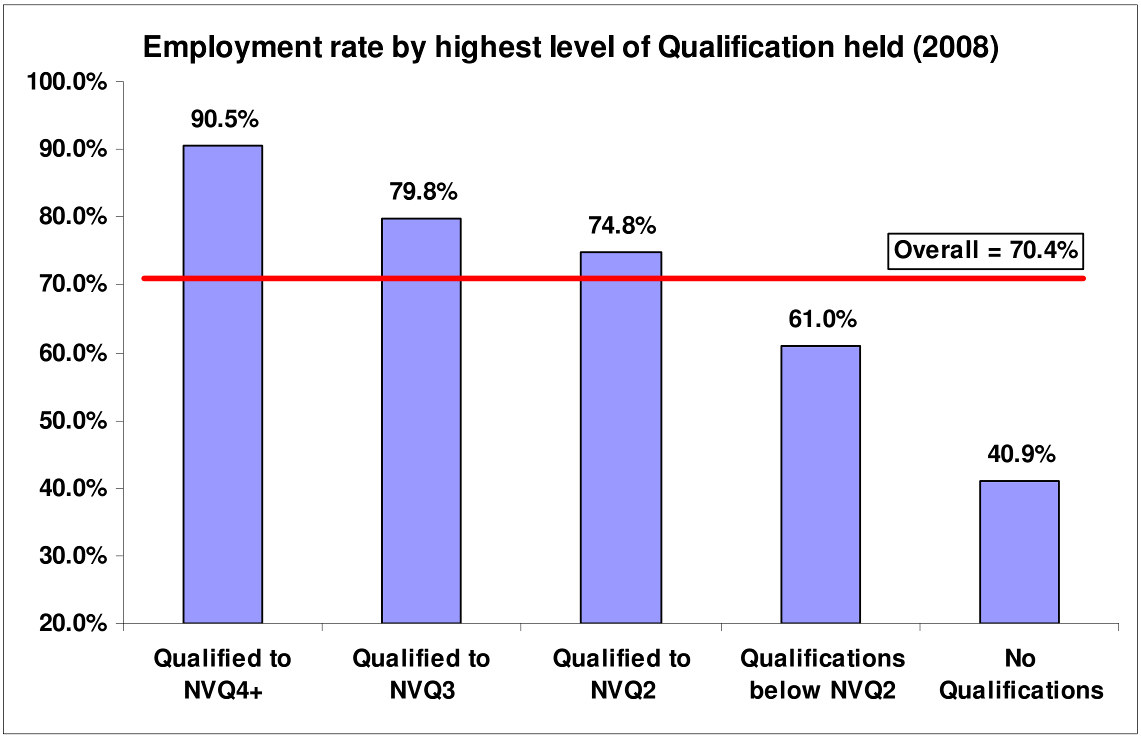
Source: DIUS from LFS/APS: Qualification levels of the 19-59/64 Population (2001-2008)



Source: DIUS from LFS/APS: Qualification levels of the 19-59/64 Population (2001-2008)

Looking at the change for individual qualification levels[21] only NVQ level 4 has shown a rise, with an additional 7.1% of the population in this bracket. The percentage at NVQ levels 1, 2 and 3 has fallen along with those who have no qualifications. The reduction in the workforce with no qualifications appears to have stalled since 2004 and it will be important in the future that this proportion of the population is up-skilled into the higher levels.

The importance of the level of qualifications in the workforce is highlighted by the following chart. At the end of 2008 the average employment rate across the borough was 70.4% but this varies dramatically by the highest level of qualification held – those with a NVQ level 4 or above qualification had an employment rate of 90.5% whilst those with no qualifications had an employment rate of only 40.9%. Only those qualified to at least NVQ level 2 had an employment rate above the borough average.

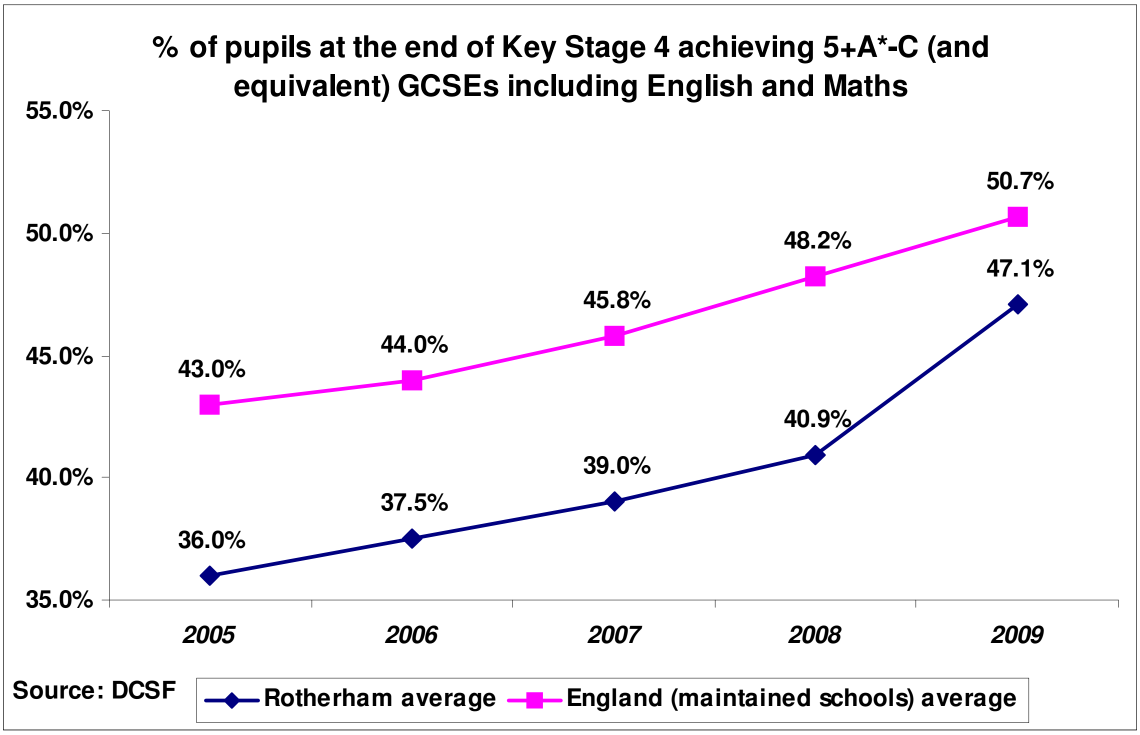


Source: DIUS from LFS/APS: Employment rates by highest level of qualification

School Attainment

The main indicator for GCSE attainment is 5 A*-C including English and Maths – data is only available at a local level from 2005 but in this period Rotherham has seen a massive improvement, reducing the gap from 7 percentage points of the England (maintained schools) average to just 3.6 percentage points in 2009.

[21] *Apprenticeships reported without a specific level are split 50% level 3 and 50% as level 2. As with all DIUS analyses other qualifications have been apportioned in the proportions 10% Level 3, 35% Level 2 (i.e. 45% level 2+) and 55% below level 2. Estimates available from NOMIS do not currently use this apportionment and therefore will tend to be lower at L3+ and L2+*



Results in 2008/09 put Rotherham as one of the better performing districts in the region, improving by 11 percentage points in the last 4 years resulting in reaching the regional average.

National Indicator 75: Percentage of pupils achieving 5 or more A*- C grades at GCSE or equivalent including English and Mathematics			
Area:	2004/05	2008/09	% points difference
Barnsley	32	39	8
Doncaster	34	43	9
Rotherham	36	47	11
Sheffield	38	44	7
Bradford	33	42	9
Calderdale	42	51	9
Kirklees	39	47	8
Leeds	38	46	7
Wakefield	40	49	9
Kingston upon Hull	27	37	10
East Riding of Yorkshire	50	52	3
North East Lincolnshire	32	46	14
North Lincolnshire	38	45	8
North Yorkshire	52	58	7
York	48	59	11
Yorkshire and The Humber Region	39	47	8
England	43	51	8
Source: DCFS			

Attainment at Level 3 (i.e. at least 1 A level or equivalent) for 16-18 year olds can give an indication of progression from GCSE achievements towards higher education. In 2008/09 the average point score achieved per candidate across England was 739.1 compared to 728.5 for the region and 719.3 in

Rotherham. The improvement in Rotherham is, like at GCSE, one of the best in the region with the gap to both the region and nationally narrowing.

Post 16 - Level 3 (A Level Results)						
	Average Point Score per candidate			Average Point Score per entry		
Area:	2006	2009	Difference	2006	2009	Difference
Barnsley	664.7	657.6	-7.1	200.5	207.3	6.8
Doncaster	677.3	697.4	20.1	187.9	199.8	11.9
Rotherham	689.2	719.3	30.1	191.1	200	8.9
Sheffield	685.1	682.5	-2.6	207.7	209.4	1.7
Bradford	646.8	677.6	30.8	190.7	196.5	5.8
Calderdale	701.9	753.6	51.7	192.8	204.8	12
Kirklees	839.2	807.6	-31.6	204.5	209.6	5.1
Leeds	690.3	694	3.7	199.1	203.2	4.1
Wakefield	728.6	748.8	20.2	199.8	203.2	3.4
Kingston upon Hull	735.6	743.2	7.6	194.8	206.1	11.3
East Riding of Yorkshire	689.9	721.2	31.3	196.9	201.6	4.7
North East Lincolnshire	718	690.9	-27.1	195.1	196.7	1.6
North Lincolnshire	759.7	737.4	-22.3	195.2	201.2	6
North Yorkshire	781.8	782.2	0.4	207.5	211.8	4.3
York	725	757.5	32.5	207.3	216.1	8.8
Yorkshire and The Humber Region	725	728.5	3.5	200.4	205.2	4.8
England	721.5	739.1	17.6	206.2	211.7	5.5
Source: DCFS						

NEET

Being out of education, employment or training (NEET) between the ages of 16 and 18 is an enormous waste of young people's potential and their contribution to society. It is also linked to a number of other poor outcomes, including low levels of attainment and teenage conception. NEET data is complex and comes from a number of different sources – one source is the Client Caseload Information System (CCIS), a database run by Connexions in local areas to record information about the young people they work with.

The Department for Children, Schools and families (DCSF) publish an annual table of CCIS data by local authority based on the average figures between November and January. Latest 2008 figures in table below:

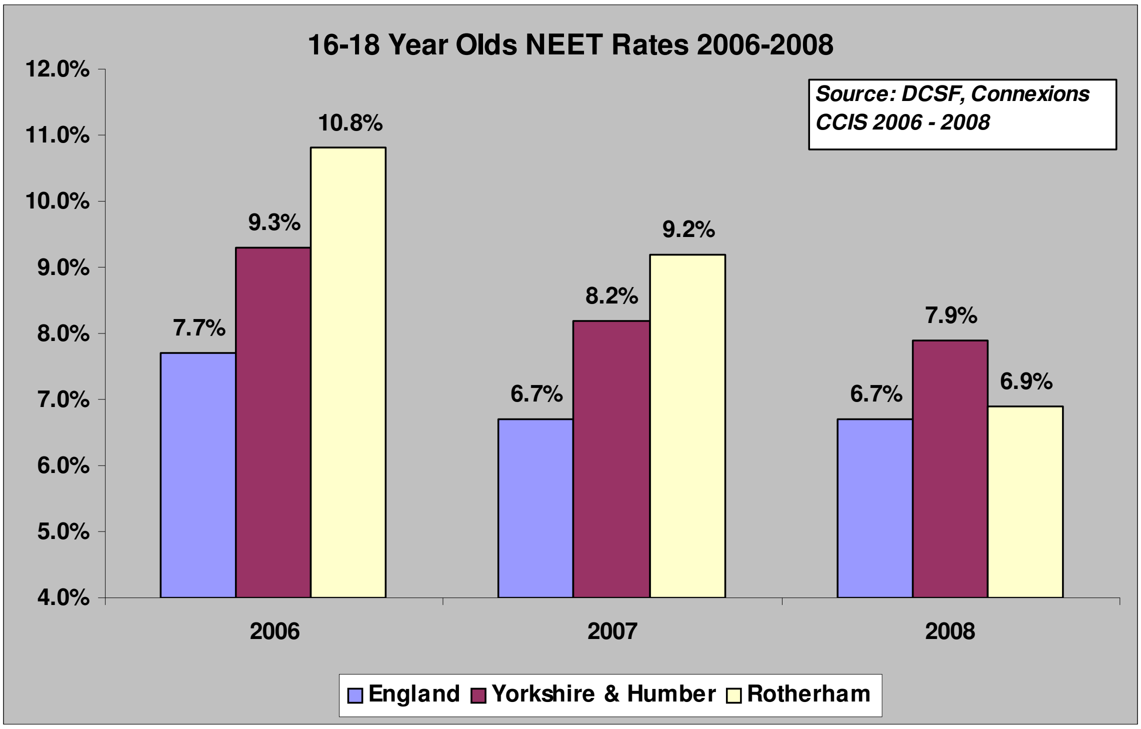
	16-18 year olds known to Connexions	16-18 year olds NEET	
		Estimated number	%
England	1,666,783	110,890	6.7%
Yorkshire & Humber	177,765	14,080	7.9%
Barnsley	7,432	590	7.9%
Doncaster	10,327	790	7.7%
Rotherham	10,921	760	6.9%
Sheffield	16,188	1,380	8.5%
Source: DCSF, Connexions CCIS 2008			

CCIS estimates[22] are always significantly lower than the Statistical First Release (SFR) – Participation in Education, Training and Employment by 16-

[22] *16-18 year olds in education are counted in the area in which their education establishment is located (except those in HE) and the percentage and number NEET has been adjusted to assume that a proportion of young people whose current activity is not known are NEET*

18 Year Olds in England which is published by DCSF each June. This is because CCIS data relates only to young people known to the service, records their actual age rather than academic age, and does not record as NEET young people who are taking a gap year or are in custody.

The large improvement in reducing the NEET rate within Rotherham in the last three years is highlighted on the chart below with the latest 2008 rate now below the regional average and close to the all England average. The recent economic downturn is likely to have impacted on this figure and it will be more difficult to maintain this improvement in the near future.



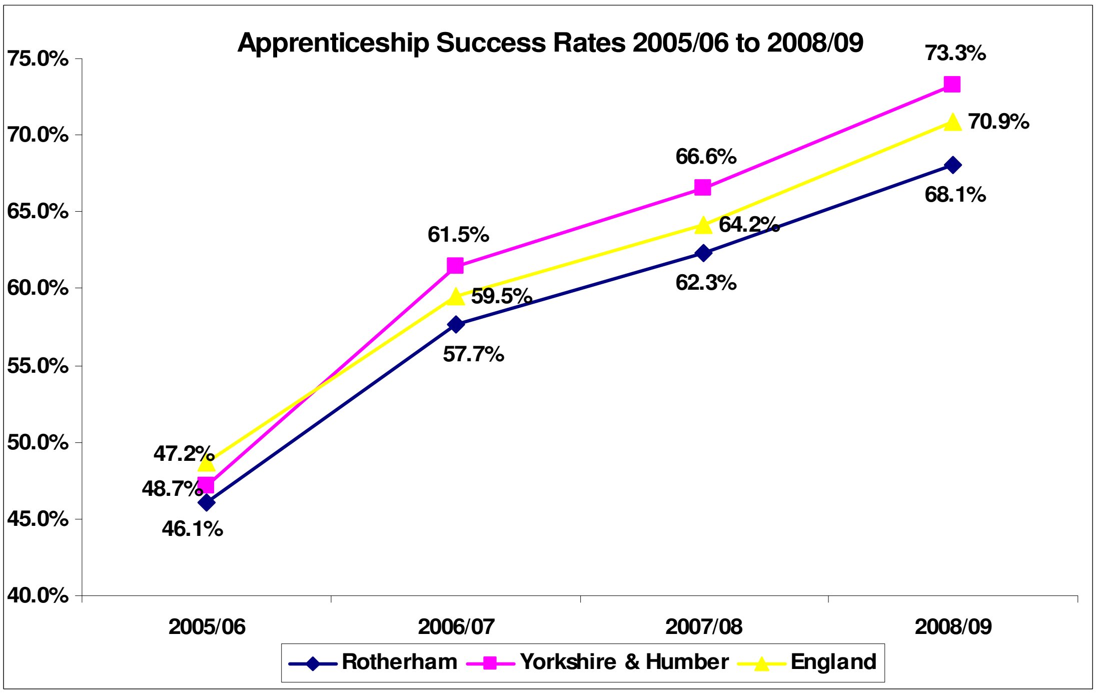
Apprentices and Higher Education

Apprenticeships bring considerable value to organisations, employers, individuals and the economy. Research shows they are an optimal way of training, developing and skilling people for the future, helping businesses secure a supply of people with the skills and qualities they need and which were often not available on the external job market.

The recently formed National Apprenticeship Service (NAS) provides details on apprenticeship numbers and success rates for all local authorities. Despite the recent economic downturn the number of apprenticeship starts in Rotherham in 2008/09 reached a record high. Numbers for each authority in Yorkshire and the Humber as below:

Apprenticeship Programme Starts by Government Office Region and Local Authority (2003/04 to 2008/09)						
Local Authority	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**2008/09**
Barnsley	1,100	1,000	1,000	1,100	1,500	1,600
Bradford	1,900	2,000	1,600	1,900	2,200	2,300
Calderdale	800	900	800	1,000	1,000	1,100
Doncaster	1,700	1,700	1,800	1,600	2,000	2,300
East Riding of Yorkshire	2,500	2,400	2,800	3,200	3,800	5,100
Kingston Upon Hull	1,600	1,400	1,400	1,300	1,600	1,800
Kirklees	1,600	1,800	1,500	1,800	2,000	2,400
Leeds	2,300	2,200	2,100	2,300	2,800	2,800
North East Lincolnshire	700	600	500	600	800	700
North Lincolnshire	700	700	600	800	1,000	800
North Yorkshire	3,700	4,500	3,500	3,500	4,200	4,100
Rotherham	**1,400**	**1,200**	**1,000**	**1,000**	**1,400**	**1,500**
Sheffield	2,200	2,000	2,000	1,900	2,700	3,100
Wakefield	1,300	1,300	1,100	1,400	1,500	1,600
York	700	800	600	700	800	800
Yorkshire & Humber Total	**24,300**	**24,600**	**22,400**	**24,100**	**29,300**	**32,100**
Source: National Apprenticeship Service / Data Service						

Success rates[23] have also been improving over the last few years although in Rotherham the rate remains 1.8 percentage points below the regional rate and over five percentage points behind the England average.



Source: National Apprenticeship Service

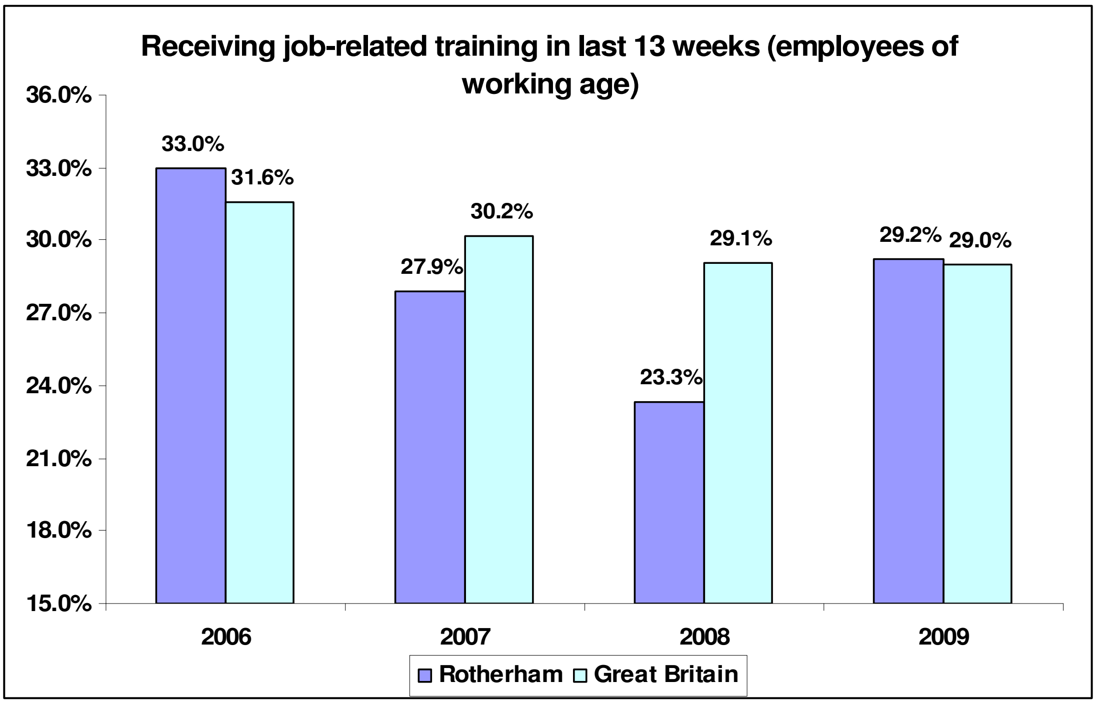
[23] *Apprenticeship success rates are based on the number of learners who meet all of the requirements of their apprenticeship framework, divided by the number of learners who have left training or successfully completed their training in the academic year. Learners allocated to areas based upon the home postcode of the learner.*

Rotherham has also seen a large increase in the number of entrants to Higher Education Institutes – a rise of around 25% between 2000 and 2009:

Higher Education Institutions - Full time and part time Entrants aged 18 to 20						
	Full Time Entrants			Part Time Entrants		
	1999/2000	2008/09	Difference	1999/2000	2008/09	Difference
Barnsley	485	735	250	30	35	5
Doncaster	820	1,060	240	25	65	40
Rotherham	**805**	**1,005**	**200**	**45**	**50**	**5**
Sheffield	1,550	2,245	695	95	95	0
Bradford	1,715	2,220	505	95	125	30
Calderdale	715	865	150	35	45	10
Kirklees	1,650	1,950	300	90	100	10
Leeds	2,520	3,145	625	175	160	-15
Wakefield	855	1,165	310	50	55	5
Kingston upon Hull	430	690	260	50	65	15
East Riding of Yorkshire	1,400	1,720	320	80	110	30
North East Lincolnshire	505	485	-20	15	35	20
North Lincolnshire	600	590	-10	25	35	10
North Yorkshire	2,710	3,185	475	85	255	170
York	685	835	150	15	55	40
Yorkshire and The Humber Region	17,600	22,115	4,515	930	1,310	380
England	203,400	257,385	53,985	9,330	15,490	6,160
Source: DCSF from Higher Education Statistics Agency (HESA) student records						

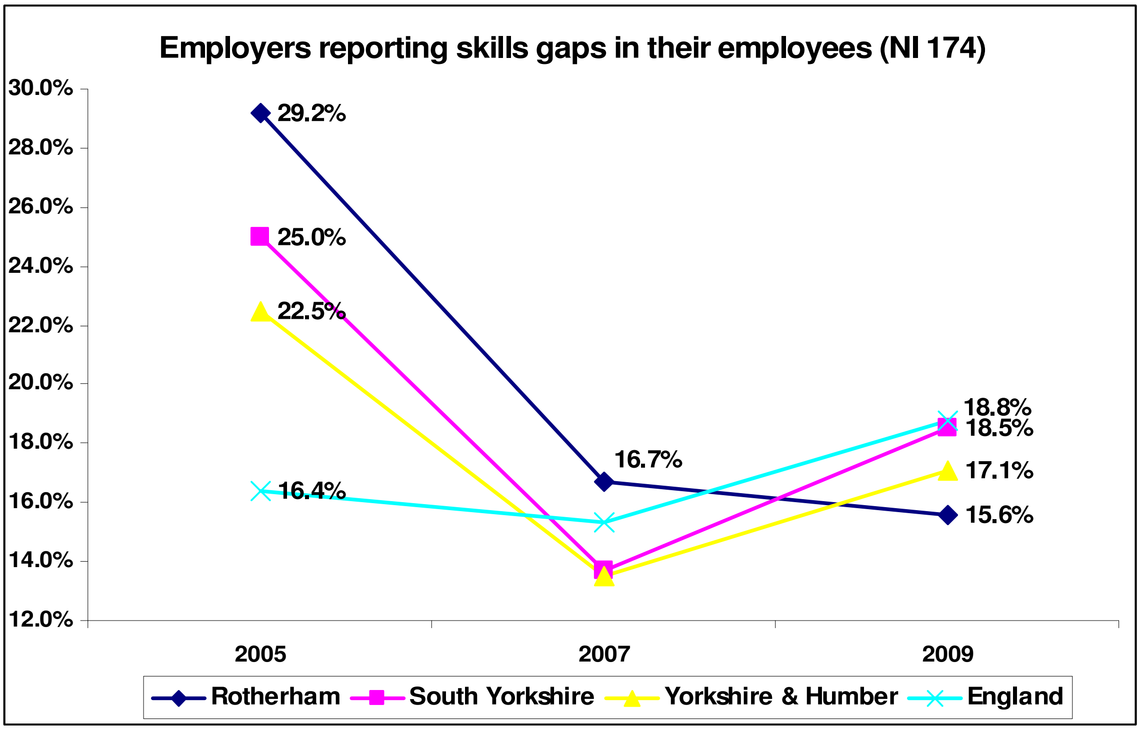
Job-related Training / Skills Gaps

The ONS Annual Population Survey (APS) gives an indication of the extent of job-related training in an area – this does tend to fluctuate at a local authority level, probably due to the sample size of the survey, but it appears that training given to employees in Rotherham is in-line with the national rate.



Source: NOMIS Annual Population Survey 2006 - 2009

The National Employers Skills Survey (NESS) is a large scale survey of employers across England which asks employers about any skills gaps that exist within their employees. This is the basis for new National Indicator NI174 and latest results are from the 2009 survey – for Rotherham 15.6% of employers reported skills gaps in their employees compared to 17.1% for the region and 18.8% for England. Last three years survey results as below:



Source: LSC - National Employers Skills Survey 2005-07

Skills: Key Issues

NVQ Levels
- Low level of skills within the local workforce compared with both the regional and national averages
- An additional 12,000 of working age need to be upskilled to Level 4+ (degree level) to reach the national average
- Rotherham has 7,000 more working age people with no qualifications than if it was at the national average

Skills Gaps
- Future employment growth predicted to be in those sectors which require a highly skilled workforce
- Importance of skills – i.e. employment rate of people with no qualifications is 40.9%, those with NVQ4+ is over 90%
- 15.6% of employers reporting skills gaps in their employees

School Attainment
- GCSE performance improving rapidly but lags behind the national average
- Reduction in 16-18 year old NEET (not in Education, Employment or Training) rate but challenging to maintain this in current economic downturn

Higher Education
- Numbers taking up apprenticeships increasing despite the recession, but success rates lagging behinfd the national average
- A 25% increase in last nine years in number of entrants to higher education institutions

ENTERPRISE

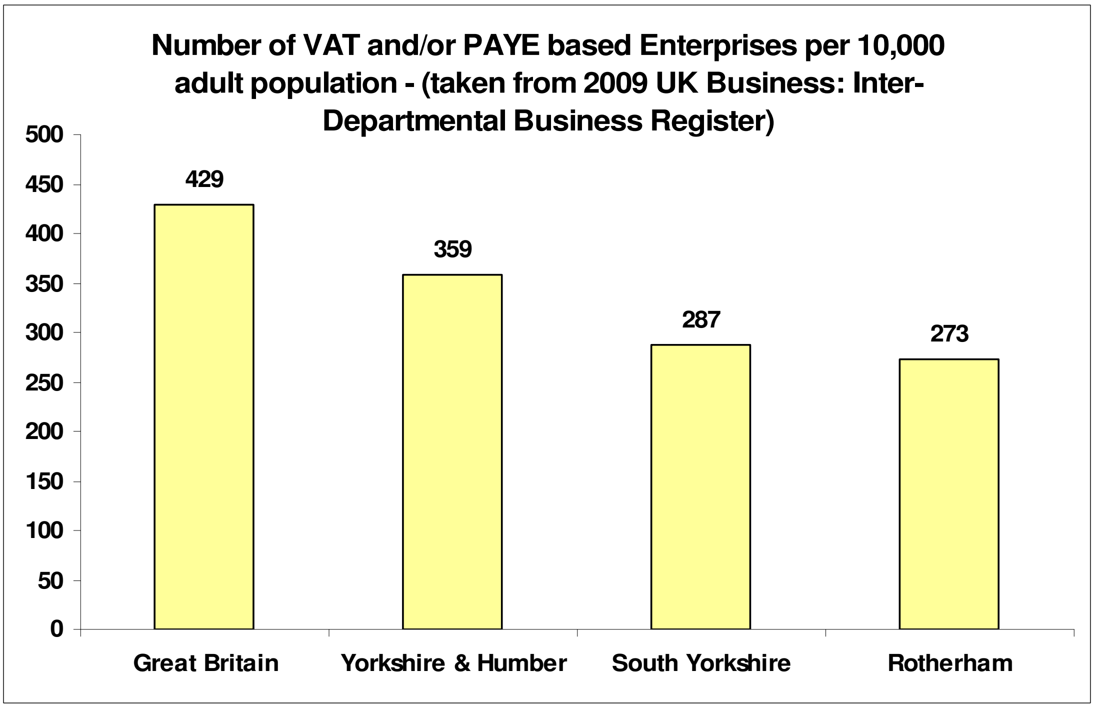
The health and growth of the private sector within the local economy is a key element in the provision of employment and wealth creation across the borough and for the overall strength of the economy. Business stocks, sector / structure, productivity, and levels of innovation and entrepreneurship can be monitored to understand how Rotherham has improved in recent years and highlight where improvements are needed.

The main source of data on businesses[24] comes from –

- The ONS Inter-Departmental Business Register (IDBR), UK Business: Activity, Size and Location
- The new ONS Business Demography datasets for business births, deaths and survival rates
- The ONS Annual Business Inquiry – annual survey of employers / workplaces

Business Numbers:

Rotherham has historically had a low business to population ratio and this remains the case despite significant improvement over recent years.



Rotherham would require an additional 1,800 enterprises to reach the regional average or an additional 3,200 to reach the national average. Compared with the other South Yorkshire districts the gap is closer but Rotherham remains

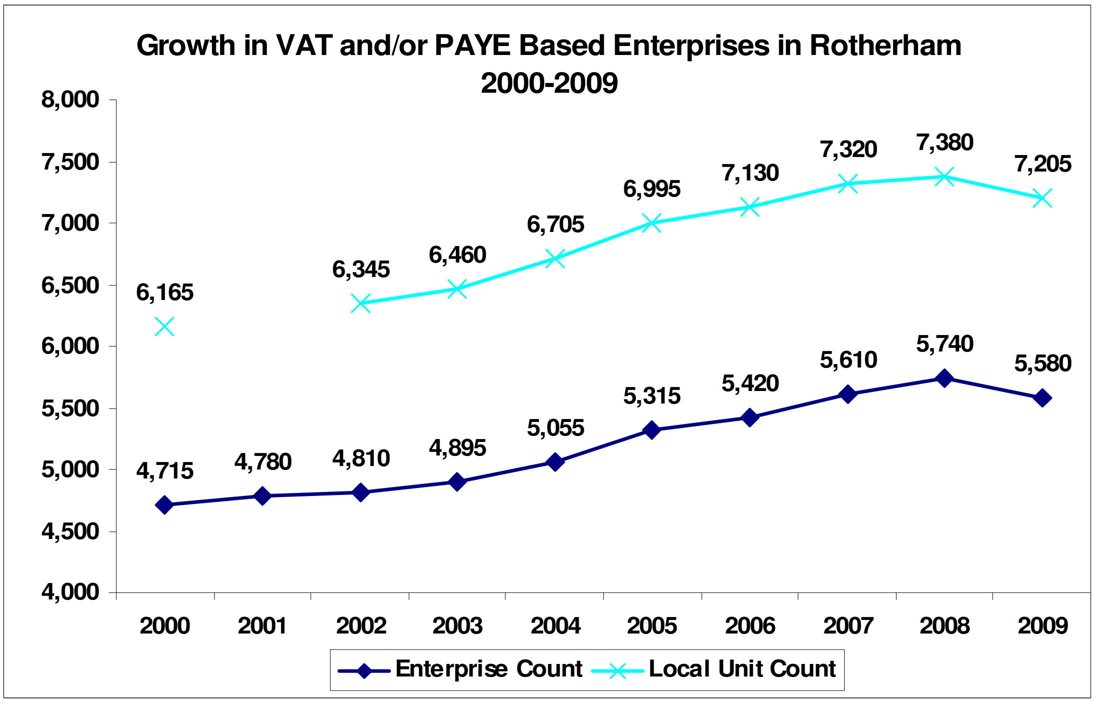
[24] *Business definitions used in this analysis are either an 'Enterprise' – a business generally based on VAT and/or PAYE records that has a certain degree of autonomy OR a 'Local Unit' – an individual site (for example a factory or shop) in an enterprise.*

the worst performing district on this measure with an additional 300 enterprises needed to reach the average.

	Total Businesses* (2009)	Per 10,000 adult (16+) population
Great Britain	2,081,780	429
Yorkshire & Humber	152,475	359
South Yorkshire	30,595	287
Rotherham	5,580	273
Barnsley	5,180	283
Doncaster	6,750	286
Sheffield	13,085	296

*Businesses = number of VAT and/or PAYE based enterprises. Taken from UK Business: Activity, Size and Location 2009 Inter-Departmental Business Register

However the gap has closed considerably in the last 10 years with a continuing increase since 2000 although falling back in 2009 as the recession began to impact.



Source: UK Business: Activity, Size and Location Inter-Departmental Business Register

The percentage rate of growth is well above that seen across the rest of South Yorkshire and regionally or nationally –

Change 2000 - 2009	Increase in Enterprises	Increase in Local Units
Rotherham	18.3%	16.9%
South Yorkshire	14.6%	10.5%
Yorkshire & Humber	13.1%	10.5%
England & Wales	13.1%	11.9%

Business Structure:

Looking at the broad industry sector make-up of businesses in Rotherham shows clearly the heavier concentration in the manufacturing (production) and construction sectors. These two sectors account for almost 23% of businesses compared to 19.3% regionally and only 17.3% nationally.

LOCAL UNITS in VAT and/or PAYE BASED ENTERPRISES 2009, BY BROAD INDUSTRY GROUP (SIC 2007)					
Industry:	**Rotherham**	**%**	**South Yorkshire**	**Yorkshire & Humber**	**Great Britain**
Agriculture, forestry & fishing	**145**	**2.0%**	2.3%	5.7%	4.9%
Production	**670**	**9.3%**	8.2%	7.5%	6.1%
Construction	**980**	**13.6%**	12.7%	11.8%	11.2%
Motor trades	**275**	**3.8%**	3.8%	3.5%	2.9%
Wholesale	**370**	**5.1%**	5.4%	5.3%	4.8%
Retail	**905**	**12.6%**	13.9%	12.7%	11.1%
Transport & storage (inc. postal)	**405**	**5.6%**	4.3%	4.0%	3.3%
Accommodation & food services	**470**	**6.5%**	7.2%	7.3%	6.7%
Information & communication	**230**	**3.2%**	3.9%	3.9%	6.1%
Finance & insurance	**165**	**2.3%**	2.4%	2.4%	2.5%
Property	**170**	**2.4%**	2.9%	3.2%	3.5%
Professional, scientific & technical	**615**	**8.5%**	9.7%	10.1%	13.2%
Business administration and support services	**490**	**6.8%**	6.7%	6.7%	7.6%
Public administration and defence	**90**	**1.2%**	1.0%	1.1%	1.0%
Education	**220**	**3.1%**	2.9%	2.6%	2.5%
Health	**455**	**6.3%**	5.9%	5.6%	5.2%
Arts, entertainment, recreation and other service	**550**	**7.6%**	6.9%	6.6%	7.2%
Source: UK Business: Activity, Size and Location 2009 Inter-Departmental Business Register					

There is also an over-representation of businesses in the mainly public sector industries (public administration, education and health) – these accounting for 10.6% in Rotherham compared to 9.3% regionally and 8.7% nationally. Two areas where Rotherham has a significant under-representation of businesses are in professional, scientific and technical (8.5% compared to 10.1% regional and 13.2% nationally) and information & communication (3.2% compared to 6.1% nationally).

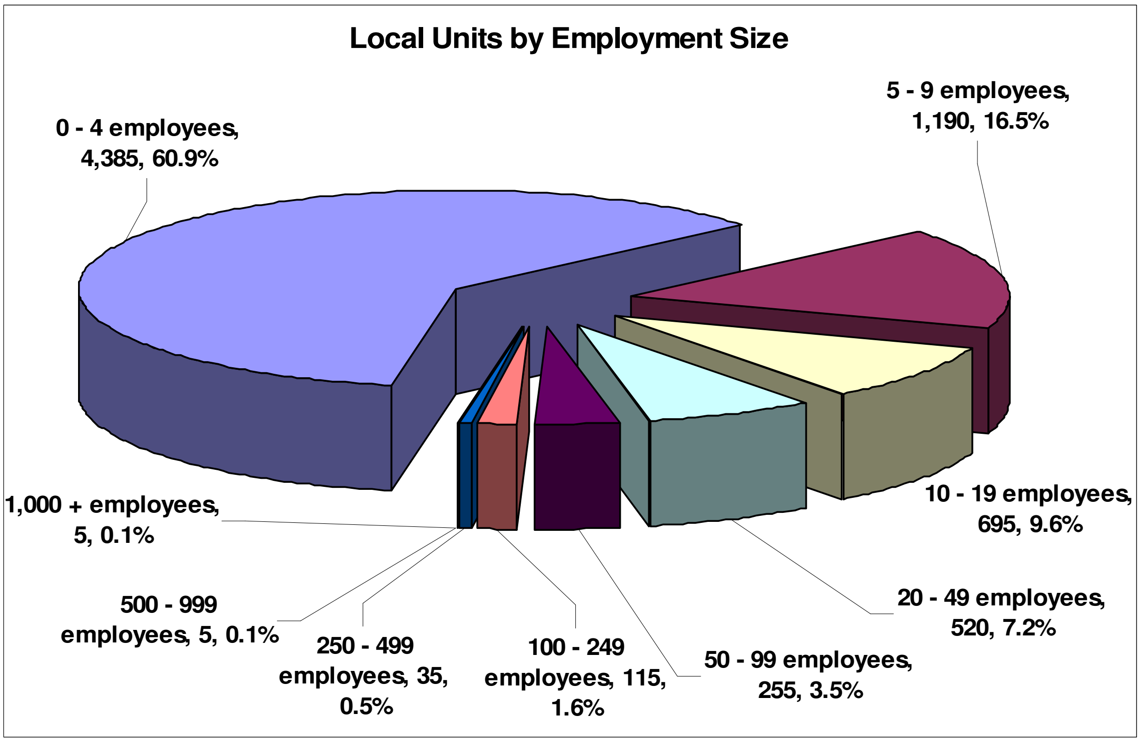
It is difficult to provide an exact comparison over time due to changes in survey methodology and in SIC[25] definitions however we can look at broad changes over the last 10 years -

INDUSTRY (data units):	**1998**	**2008**	***Change***	***% Change***
Agriculture & Utilities	**n/a**	**n/a**	***n/a***	***n/a***
Manufacturing	**722**	**672**	***-50***	***-6.9%***
Construction	**569**	**922**	***353***	***62.0%***
Distribution, hotels and restaurants	**2,150**	**2,100**	***-50***	***-2.3%***
Transport and communications	**389**	**472**	***83***	***21.3%***
Banking, finance and insurance	**1,036**	**1,629**	***593***	***57.2%***
Public administration,education & health	**503**	**780**	***277***	***55.1%***
Other services	**467**	**532**	***65***	***13.9%***
TOTAL	**5,836**	**7,107**	***1,271***	***21.8%***
Source: ONS Annual Busines Inquiry				

[25] *The United Kingdom Standard Industrial Classification of Economic Activities (SIC) is used to classify business establishments and other standard units by the type of economic activity in which they are engaged, since 1992 there have been revisions in 2003 and in 2007.*

Whilst the number of manufacturing businesses has fallen there as been significant increases in construction and in the service sectors (particularly in banking, finance and insurance and the public sector). This correlates with the fall in importance of manufacturing as a source of local employment.

Rotherham not only has a relative low number of businesses overall but also relies more heavily on large employers in providing employment – this lack of small businesses is a recognised weakness in the local economy.



Source: UK Business: Activity, Size and Location Inter-Departmental Business Register 2009

In Rotherham 77.4% of businesses[26] employ less than 10 people compared to 82.9% of all businesses at the national level. Conversely 5.8% employ over 50 people compared to just 3.4% in Great Britain and 3.8% regionally.

LOCAL UNITS BY EMPLOYEE SIZE 2009 - COMPARISON

	<10 employees	10 - 49 employees	50 - 249 employees	250+ employees
Rotherham	77.4%	16.8%	5.1%	0.7%
South Yorkshire	78.7%	16.7%	3.9%	0.7%
Yorks & Humber	80.9%	15.3%	3.3%	0.5%
Great Britain	82.9%	13.7%	2.9%	0.5%

Source: UK Business: Activity, Size and Location Inter-Departmental Business Register

This is re-enforced by looking at the number of enterprises by turnover which shows that 11.5% of enterprises in Rotherham have a turnover in excess of a million pounds, compared to 9.8% of enterprises nationally.

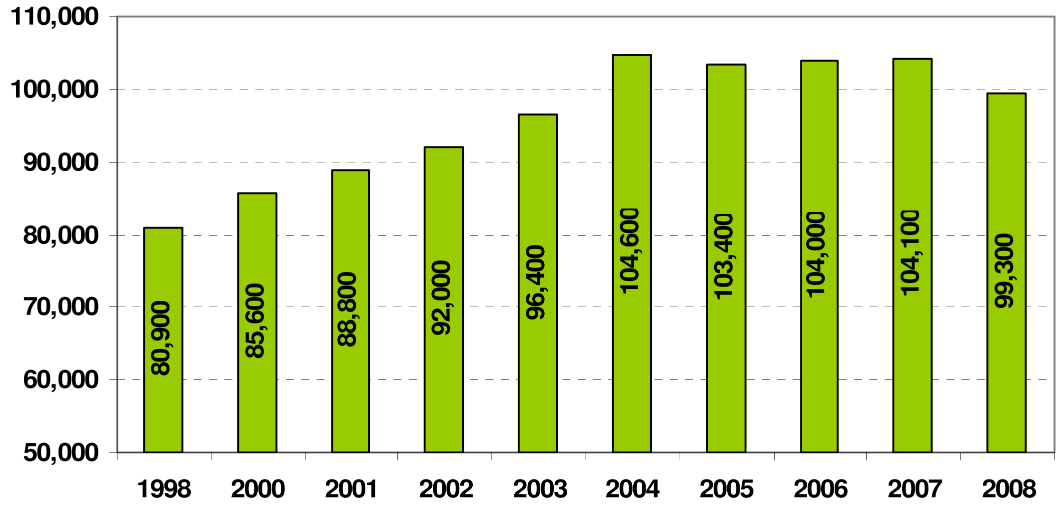
[26] *Note that these datasets will exclude many very small businesses that are not registered for VAT and/or PAYE.*

VAT and/or PAYE BASED ENTERPRISES 2009, BY TURNOVER					
Turnover:	Rotherham	%	South Yorkshire	Yorkshire & Humber	Great Britain
0 - £49,000	845	15.1%	15.5%	16.4%	17.1%
£50,000 - £99,000	1350	24.2%	23.3%	23.7%	24.8%
£100,000 - £249,000	1480	26.5%	27.7%	27.9%	27.7%
£250,000 - £499,000	770	13.8%	13.5%	13.3%	12.6%
£500,000 - £999,000	495	8.9%	8.9%	8.4%	8.0%
£1,000,000 - £4,999,000	490	8.8%	8.6%	7.9%	7.5%
£5,000,000 +	150	2.7%	2.4%	2.4%	2.3%
Source: UK Business: Activity, Size and Location 2009 Inter-Departmental Business Register					

Workplace Employment:

Strong business growth in Rotherham over the last 10 years is reflected in the number of workplace employee jobs in the borough with a strong increase up to 2004, although 2008 is showing a fall.

Employee Jobs - Workplace in Rotherham



Source: ONS Annual Business Inquiry

The rate of increase in Rotherham for the period 1998 to 2008 is over twice the sub-regional, regional and national averages -

	1998	2000	2001	2002	2003	2004	2005	2006	2007	2008	% Increase 98 - 08
Rotherham	80,900	85,600	88,800	92,000	96,400	104,600	103,400	104,000	104,100	99,300	22.7%
Barnsley	71,500	72,200	69,300	73,700	74,500	75,100	73,800	70,300	70,500	69,200	-3.2%
Doncaster	105,100	101,200	100,400	105,600	107,700	111,200	113,500	116,400	114,700	115,500	9.9%
Sheffield	223,800	224,500	231,400	233,700	239,700	246,700	252,000	249,300	248,200	247,800	10.7%
South Yorkshire	482,500	484,600	490,000	505,000	518,200	537,500	542,600	539,900	537,600	531,800	10.2%
Yorks. & Humber	2,049,700	2,078,100	2,113,900	2,154,500	2,199,400	2,249,400	2,243,700	2,236,400	2,238,000	2,232,300	8.9%
Great Britain	24,355,000	25,214,600	25,490,300	25,593,700	25,710,600	26,067,500	26,496,600	26,355,100	26,602,200	26,677,200	9.5%

Source: ONS Annual Business Inquiry

The increase in employment within Rotherham varies by sector, with employment in manufacturing falling but this being more than offset by increases in the service sectors. The public sector, banking, finance &

insurance, and distribution sectors are now more important than manufacturing in Rotherham in providing employment.

INDUSTRY:	1998	2008	Change	% Change
Agriculture & Utilities	900	1,400	500	55.6%
Manufacturing	21,900	15,200	-6,700	-30.6%
Construction	4,700	6,800	2,100	44.7%
Distribution, hotels and restaurants	19,800	21,700	1,900	9.6%
Transport and communications	4,300	4,500	200	4.7%
Banking, finance and insurance	8,700	17,500	8,800	101.1%
Public administration,education & health	17,900	27,900	10,000	55.9%
Other services	2,700	4,300	1,600	59.3%
TOTAL	80,900	99,300	18,400	22.7%

Source: ONS Annual Business Inquiry

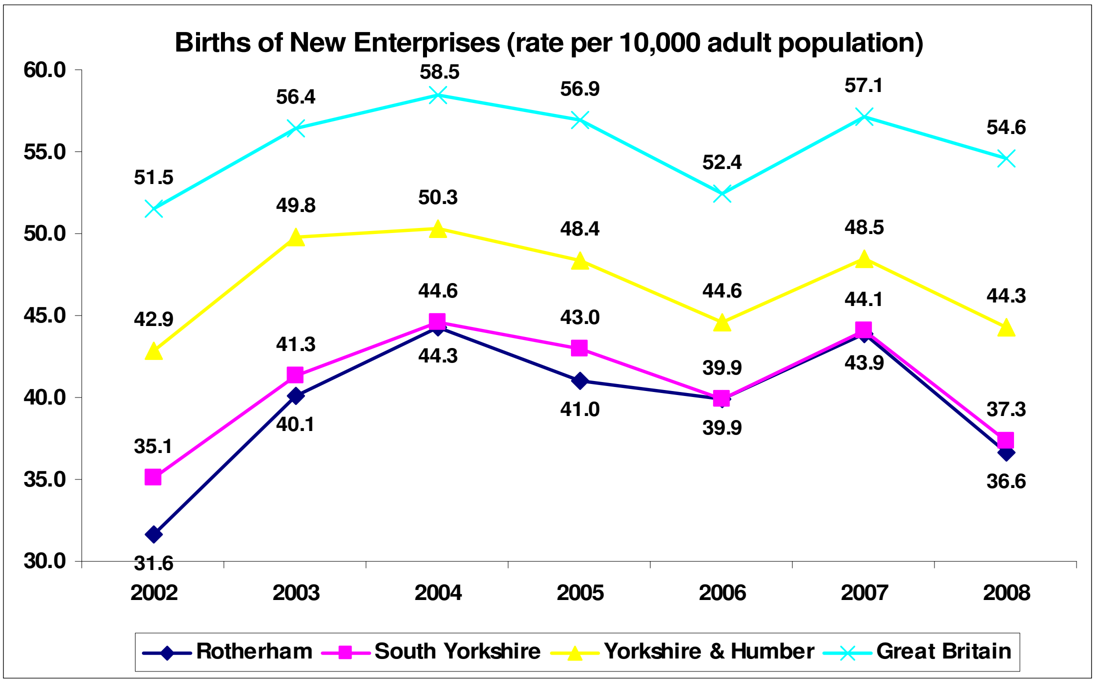
Over a third of these new jobs have been part-time[27] and the majority of these have been taken up by women. The number of workplace employee jobs in Rotherham in 2008 is now roughly equal for both men and women. Looking at the change between 1998 and 2008 some 60% (11,000) of the increase in workplace jobs have gone to female workers. However half of these new jobs have been part-time with female part-time jobs for 2008 in Rotherham outnumbering male part-time jobs by 3.7 to 1.

Workplace Jobs - Changes 1998-2008			
	1998	2008	Increase:
Male Full Time Workers	37,100	42,800	5,700
Male Part Time Workers	5,100	6,800	1,700
Female Full Time Workers	19,100	24,600	5,500
Female Part Time Workers	19,600	25,100	5,500
Source: ONS Annual Business Inquiry			

Births, deaths and survival:

The new ONS Business Demography datasets enables analysis on active[28] enterprises within an area. An important indicator on the level of entrepreneurship is the number of new start-up businesses and the ratio to population (new National Indicator NI 171). In Rotherham over recent years the birth[29] rate has been similar to or just below the sub-regional average but well below the regional and national rates.

[27] *Part-time defined as working 30 or fewer hours per week.*
[28] *The starting point for demography is the concept of a population of active businesses in a reference year (t). These are defined as businesses that had either turnover or employment at any time during the reference period.*
[29] *A birth is identified as a business that was present in year t, but did not exist in year t-1 or t-2.*



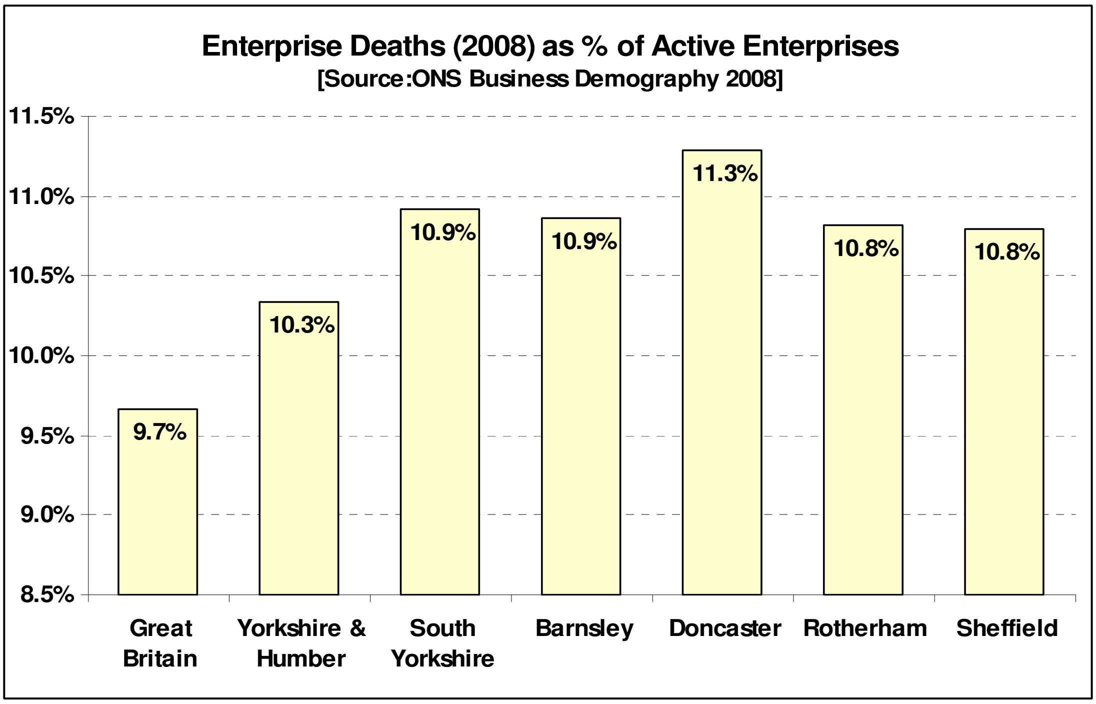
Source: ONS Business Demography Count of Births of New Enterprises

This figure does tend to fluctuate from year to year so it is difficult to ascertain long-term trends - the latest data from 2008 shows Rotherham with a rate below other South Yorkshire districts, although slightly above Sheffield.

COUNT OF BIRTHS OF NEW ENTERPRISES in 2008						
	Employment Size Band					Rate:
	0 - 4	5 - 9	10 - 19	20 +	Total	
Great Britain	240,180	15,960	5,860	2,525	264,525	54.6
Yorkshire & Humber	16,890	1,270	470	180	18,810	44.3
South Yorkshire	3,560	295	85	35	3,975	37.3
Barnsley	635	35	15	10	695	37.9
Doncaster	830	70	15	5	920	39.0
Rotherham	**670**	**60**	**15**	**5**	**750**	**36.6**
Sheffield	1,425	130	40	15	1,610	36.5
Source: ONS Business Demography 2008						

The opposite side of this data is to consider the rate of business deaths[30] - the number of deaths in 2008, expressed as a percentage of the active stock in 2007, shows Rotherham in line with the South Yorkshire average but above the regional and national rates.

[30] *A death is defined as a business that was on the active file in year t, but was no longer present in the active file in t+1 and t+2.*



Higher death rates are not necessarily a negative aspect of an economy provided they are accompanied by higher start-up rates, and a higher business 'churn' can indicate a more dynamic and rapidly modernising economy. The challenge for Rotherham is to increase business start-ups and increase overall business stocks.

Latest survival[31] rates from the ONS Business Demography dataset indicate that new enterprises in Rotherham have a lower than average 1-year survival rate, based on the number of births of enterprise units in 2007 still in existence in 2008. However the 3-year survival rate, based on the number of births of enterprise units in 2005 still in existence in 2008, is above the sub-regional and regional averages. The current recession is likely to have impacted on these figures in 2009/10 when released.

SURVIVAL OF NEWLY BORN ENTERPRISES		
	1 Year	3 Year
Great Britain	95.5%	64.6%
Yorkshire & Humber	94.5%	62.5%
South Yorkshire	95.1%	61.4%
Barnsley	95.7%	61.6%
Doncaster	94.4%	60.8%
Rotherham	**93.9%**	**64.5%**
Sheffield	95.7%	60.3%
Source: ONS Business Demography 2008		

[31] *A business is deemed to have survived if having been a birth in year t or having survived to year t; it is active in terms of employment and/or turnover in any part of t+1*

Rotherham Investment & Development Office (RiDO) is the regeneration arm of Rotherham Metropolitan Borough Council and provides over 180 office / workspaces for start-up and small businesses in four Business Centres across the borough - Century Business Centre (Manvers, North Rotherham), Moorgate Crofts Business Centre (Edge of Town Centre, Central Rotherham), Fusion @ Magna (Templeborough, Central Rotherham) and Matrix @ Dinnington (South Rotherham). All centres offer full secretarial and administrative support services and the survival rate for companies for the crucial first 3 years is **over 80%.**

Whilst new business formation and survival are of vital importance it is also important to the local economy and employment that existing businesses continue to grow. The ONS release figures from the IDBR which measure the percentage of small businesses[32] in an area that show employment growth (new National Indicator NI 172).

Percentage of small businesses showing employment growth						
	2002-03	**2003-04**	**2004-05**	**2005-06**	**2006-07**	**2007-08**
Great Britain	10.8%	10.3%	11.6%	14.7%	14.4%	14.4%
Yorkshire & Humber	11.3%	11.1%	12.5%	15.1%	15.3%	15.0%
South Yorkshire	11.4%	11.1%	12.5%	15.8%	14.9%	15.5%
Barnsley	10.3%	11.5%	12.0%	15.6%	15.8%	14.8%
Doncaster	10.9%	11.1%	12.4%	15.8%	15.2%	15.6%
Rotherham	**10.9%**	**10.9%**	**13.5%**	**16.0%**	**15.4%**	**15.5%**
Sheffield	12.2%	11.1%	12.4%	15.7%	14.3%	15.7%
Source: ONS Inter-Departmental Business Register						

In most of the years between 2002/3 and 2007/08 Rotherham has seen a larger percentage of its small businesses expanding when compared to the regional and national averages – this aligns with the strong overall employment growth seen in this period. The large increase in unemployment since 2008 due to the UK recession is likely to see this percentage shrink rapidly when data is released for 2008/09 and 2009/10.

Innovation:

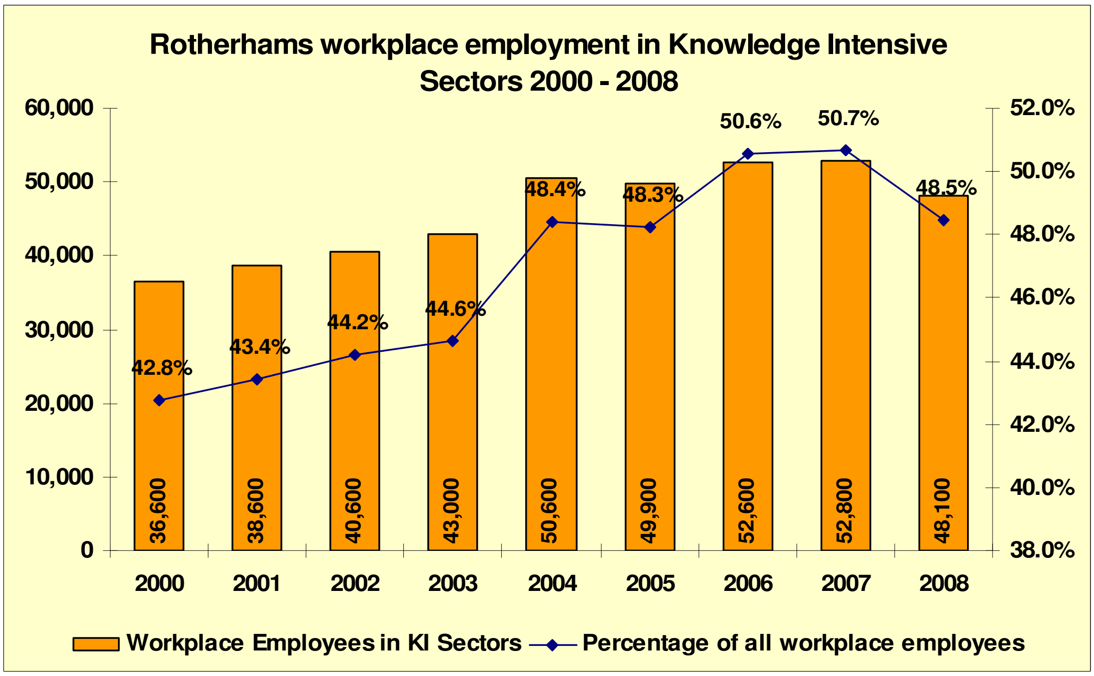
Innovation in the local economy and businesses is very difficult to quantify at a local authority or even sub-regional level. Research & Development expenditure is often used at regional and national levels but this is not measurable / captured for an area such as Rotherham. One proxy is the proportions of the workforce employed in knowledge-intensive industrial sectors, as these sectors tend to have the highest levels of R&D spend – sectors listed below.

[32] *Businesses registered for VAT and/or PAYE with fewer than 50 employees.*

Industrial sectors classed as Knowledge- Intensive	
High/Medium-Technology Manufacturing	
24	Manufacture of chemicals and chemical products
29	Manufacture of machinery and equipment
30	Manufacture of office machinery and computers
31	Manufacture of electrical machinery and apparatus
32	Manufacture of radio, television and communication equipment and apparatus
33	Manufacture of medical, precision and optical instruments, watches and clocks
34	Manufacture of motor vehicles, trailers and semi trailers
35	Manufacture of other transport equipment excluding 35.1 Building and repairing of ships and boats
Knowledge intensive services (KIS)	
61	Water transport
62	Air transport
64	Post and telecommunications
65 to 67	Financial intermediation
70 to 74	Real estate, renting and business activities
80	Education
85	Health and social work
92	Recreational, cultural and sporting activities
High Technology Knowledge Intensive Services (KIS)	
64	Post and telecommunications
72	Computer and related activities
73	Research and development
Market Knowledge Intensive Services (KIS)	
61	Water transport
62	Air transport
70	Real estate activities
71	Renting of machinery and equipment without operator and of personal and household
74	Other business activities
Financial Knowledge Intensive Services	
65 to 67	Financial intermediation
Source: Eurostat Definitions	

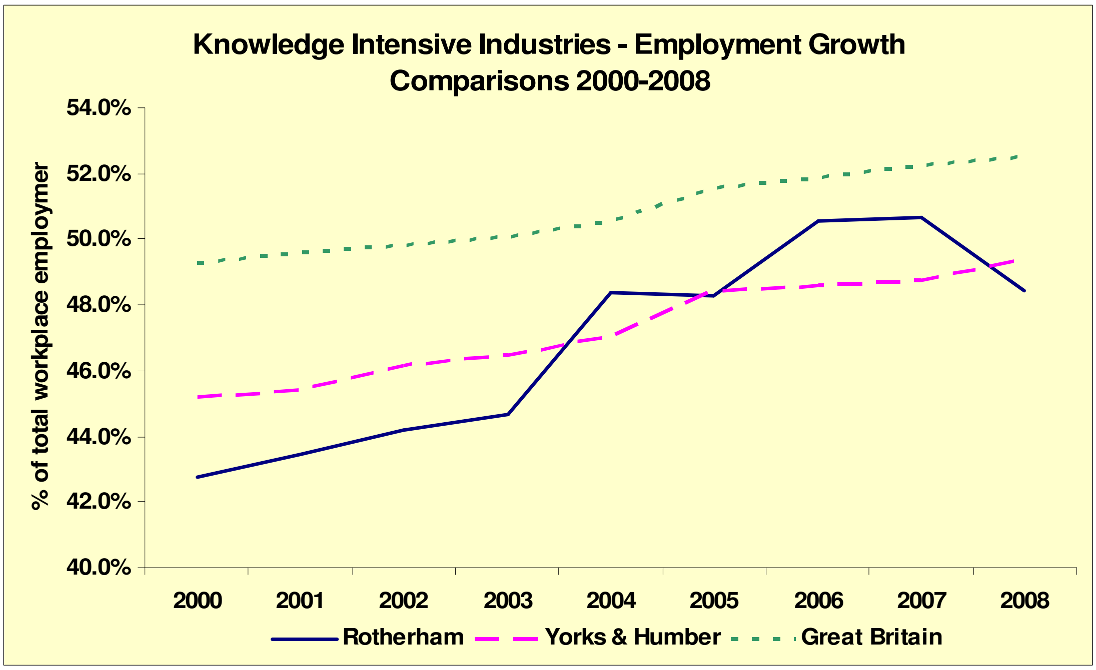
Estimated numbers employed in each sector within Rotherham is available from the ONS Annual Business Inquiry but many of these sectors are relatively small and estimates either cannot be released due to confidentiality rules or can be unreliable due to the nature / sample size of the survey. For these reasons a comparison of changes for the whole of these knowledge intensive sectors is shown below.

Rotherham has seen a steady rise in these sectors with around half of all employment now working within them. The rate of increase has been higher than both regionally and nationally, a consequence of the local economy moving away from many of the more traditional and predominantly low-skilled industries into more high-tech and knowledge intensive sectors.



Source: ONS Annual Business Inquiry 2000-2008

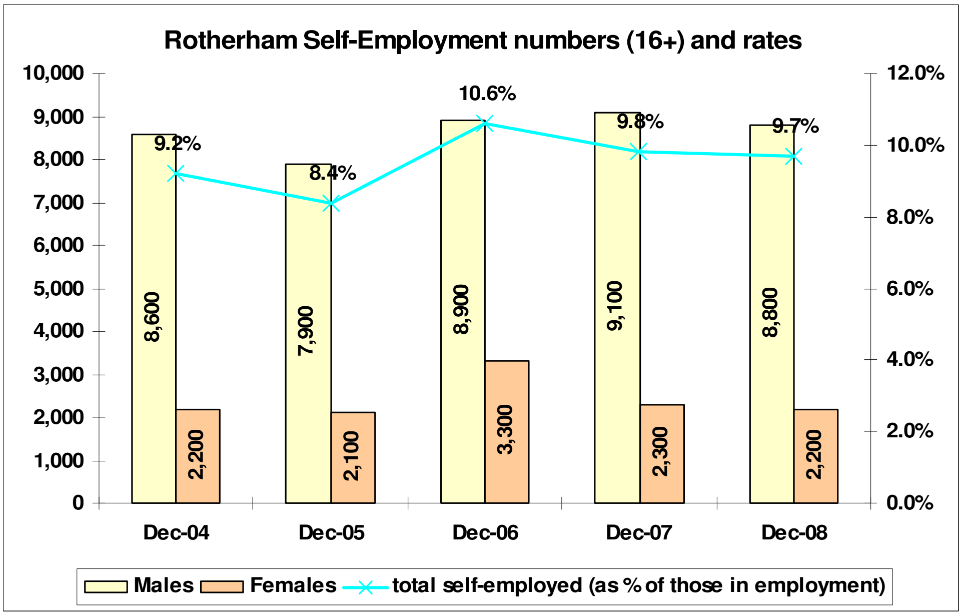
Growth faster than regionally / nationally, closing the gap despite falling back in 2008 –



Source: ONS Annual Business Inquiry 2000-2008

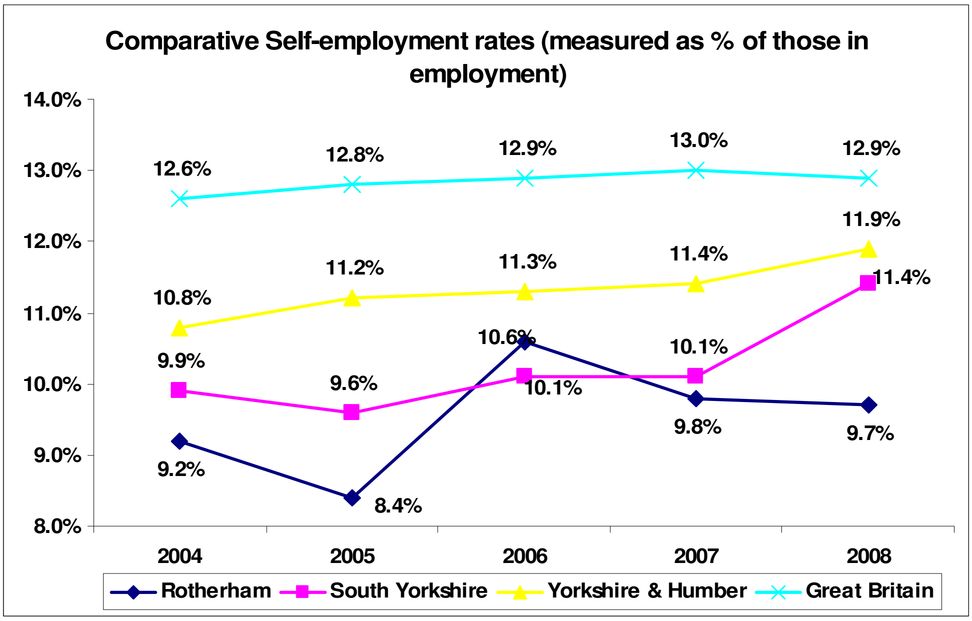
Self-employment:

The level of self-employment is a strong indication of the level of entrepreneurship in an area and a potential source of future employment growth. Self-employment in Rotherham has remained fairly constant at around 11,000 (subject to expected fluctuations due to the sample size of the Annual Population Survey) or close to 10%[33]. The male / female self-employed split has also remained fairly constant with around four times more males being self-employed than females.



Source: NOMIS APS

The self-employment lags behind regional and national rates with only a slight improvement in closing this gap –



Source: NOMIS APS

Whilst the overall gap to the national average self-employment rate is around three percentage points the gap to female self-employment rates is larger, with female self-employment in Rotherham consistently only around one half of the national rate.

[33] *Number is all self-employed aged 16+, percentage is of total in employment*

% in employment who are self employed - 16+			
	All	Males	Females
Great Britain	12.9%	17.1%	8.0%
Yorkshire & Humber	11.8%	16.1%	6.8%
South Yorkshire	11.1%	16.4%	5.0%
Barnsley	12.5%	19.6%	4.1%
Doncaster	8.7%	11.6%	5.0%
Rotherham	**9.2%**	**14.7%**	**3.1%**
Sheffield	12.7%	18.5%	6.2%
Source: NOMIS APS June 2009			

Lifestyle survey data (provided by Acxiom, via Yorkshire Forward) can be used to supplement official information on local self-employment. Questions are asked in the survey to capture households containing people who are self-employed or run their own business.

	Rotherham	South Yorkshire	Yorkshire & Humber	Great Britain
Running Own In-Home Business	1.3%	1.5%	1.9%	2.2%
Self-Employed / Business Owner	5.1%	5.4%	6.9%	7.8%
Self Employed / Business Owner / Running Own In-Home Business	**6.5%**	**6.9%**	**8.8%**	**10.0%**
Thinking About Starting New Business	1.9%	2.1%	2.2%	2.4%
Source: Acxiom 2009. Copyright				

This confirms lower levels of self-employment in Rotherham compared to the regional and national rates. It also suggests that aspirations are lower with a smaller percentage stating they are thinking about starting a new business.

Local Gross Value Added (GVA):

Gross Domestic Product (GDP) is used as the economic measure of growth for the national economy and the UK had seen 16 years of continual growth until the start of the recession in mid-2008. At a more local level we have to use per capita Gross Value Added (GVA)[34] which can be used as an indicator of wealth – although it must be remembered that it is based on the workplace, and not where people live.

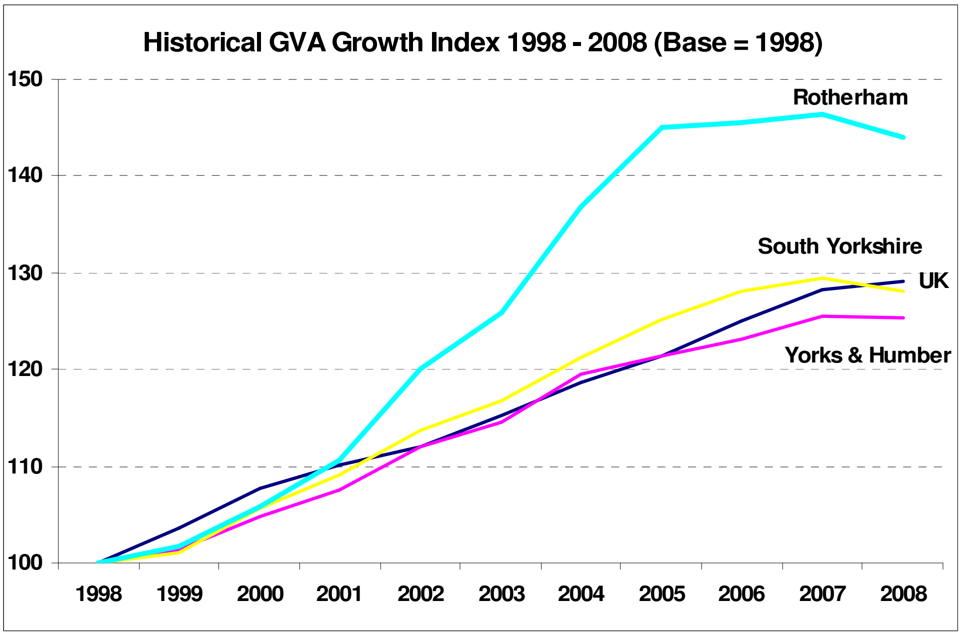
The ONS only release estimated GVA down to NUTS 3 level[35], an area comprising Barnsley, Doncaster and Rotherham. Latest data for 2007 shows GVA at 67% of the UK average, a small improvement over the last 10 years. Sheffield has a higher GVA per head as would be expected of a city economy.

[34] *Some components of GDP are not available for smaller areas, GVA takes the value added at each stage of production in an economy before adjusting for taxes and subsidies – i.e. GDP=GVA + taxes on products – subsidies on products.*

[35] *NUTS = Nomenclature of Units for Territorial Statistics for production of regional statistics in the EU, NUTS3 being the lowest level comprising 133 areas.*

GVA per head as a percentage of UK (1997 - 2007)											
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
UK	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Yorkshire & Humber	87.1%	86.9%	85.9%	85.0%	85.1%	85.1%	84.9%	84.3%	83.2%	82.0%	81.6%
South Yorkshire	73.6%	74.0%	73.2%	72.7%	73.2%	73.9%	74.4%	74.8%	74.9%	74.4%	74.4%
Sheffield	85.3%	85.5%	84.3%	83.4%	84.1%	84.8%	85.5%	85.5%	85.6%	85.2%	85.1%
Barnsley, Doncaster & Rotherham	65.6%	66.2%	65.5%	65.3%	65.8%	66.4%	67.0%	67.5%	67.6%	67.1%	67.0%
Source: ONS											

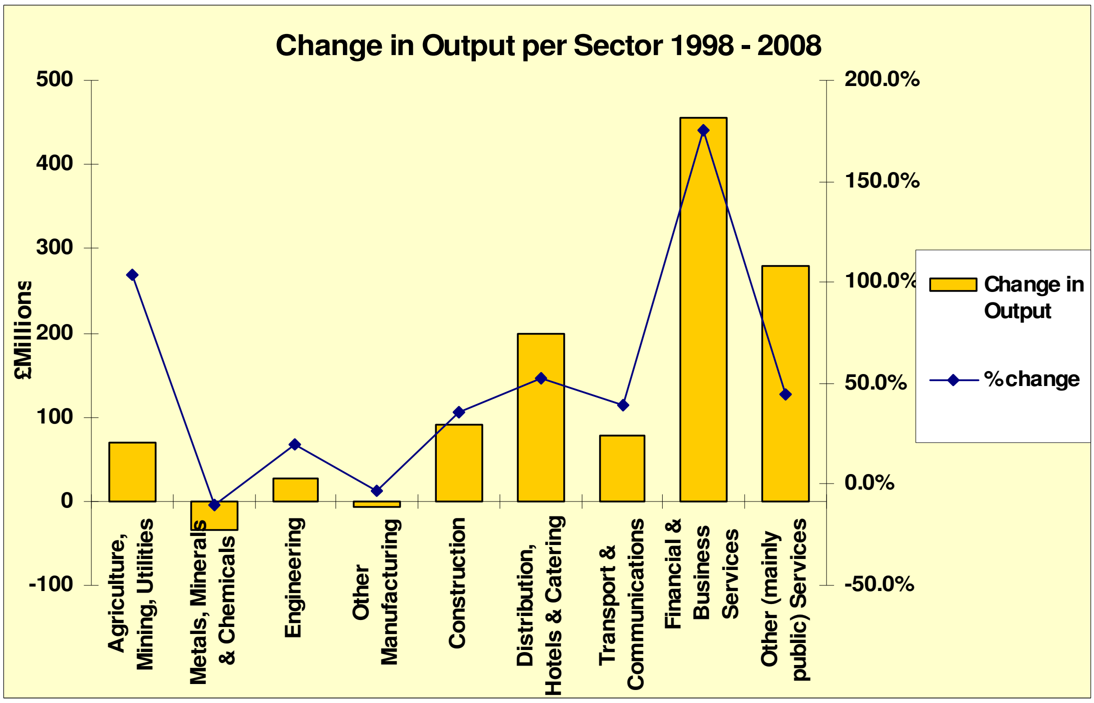
We can use the Regional Econometric Model (REM) from Experian to provide an estimate[36] of GVA at a local area such as Rotherham. Over the ten year period from 1998 to 2008 Rotherham has seen well above average GVA growth, which would be expected given the large increase in workplace employment experienced over the same period. The region and the sub-region have performed just below the national average increase of 29% over this period whilst Rotherham's GVA has increased by 44%. The first sign of the impact of the recession can be seen in 2008 with GVA dropping in Rotherham and South Yorkshire.



Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

Rotherham began from a very low base but this improvement has seen output[37] per capita (head of population) improve from just 69% of the UK figure in 1998 to 80% in 2008. This large increase in output varies across sectors with the largest rise of £456 million (175%) seen in the Financial & Business Services sector

[36] *GVA estimates obtained from the REM will not agree with ONS/Eurostat data – chiefly due to Experian using their Regional Planning Service data, the REM adjusting employment for the Census, and using constant per worker productivity.*
[37] *GVA and Output are closely linked but will not match exactly – GVA is not just the sum of value added output for all industries. Some adjustments are made for ownership of dwellings, for financial services, and for statistical discrepancy.*



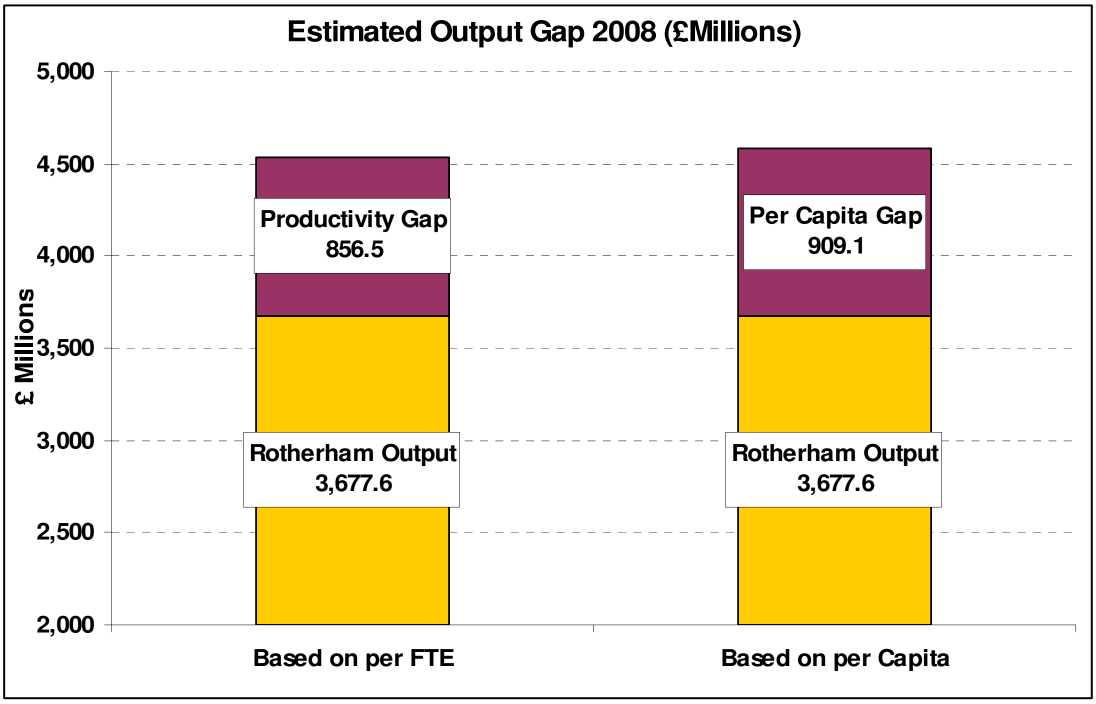
Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

The manufacturing sectors have seen little overall change in output during this period with the Metals, Minerals & Chemicals and the Other Manufacturing sectors actually showing a decline in output. However this fall in the percentage of Rotherham's economic output accounted for by manufacturing sectors has been less than that seen nationally, and manufacturing output remains relatively high as a percentage of total output compared to the regional or national average.

Output by Sector 2008 (% of total economic output)				
	Rotherham	**South Yorkshire**	**Yorks & Humber**	**UK**
Agriculture, Mining, Utilities	3.7%	1.4%	2.7%	4.3%
Metals, Minerals & Chemicals	8.4%	6.2%	5.6%	3.7%
Engineering	4.6%	3.6%	3.2%	4.1%
Other Manufacturing	6.4%	6.5%	8.3%	5.5%
Construction	9.5%	7.9%	7.5%	6.5%
Distribution, Hotels & Catering	15.8%	16.3%	17.3%	15.5%
Transport & Communications	7.6%	8.9%	8.2%	7.9%
Financial & Business Services	19.5%	20.4%	21.7%	28.1%
Other (mainly public) Services	24.6%	29.0%	25.6%	24.6%
Source: YF / Experian, REM April 2010				

Manufacturing still accounts for £714 million or 19.4% of the total output of the Rotherham economy compared to 17.1% regionally and just 13.3% of UK output. Despite the large increase in output from the Financial & Business Services sector the percentage of economic output in Rotherham accounted for by this sector is over eight percentage points less than the UK as a whole.

Whilst the overall picture has improved greatly over the last 10 years the performance of the economy in Rotherham lags behind the national, and to a lesser extent, the regional average.

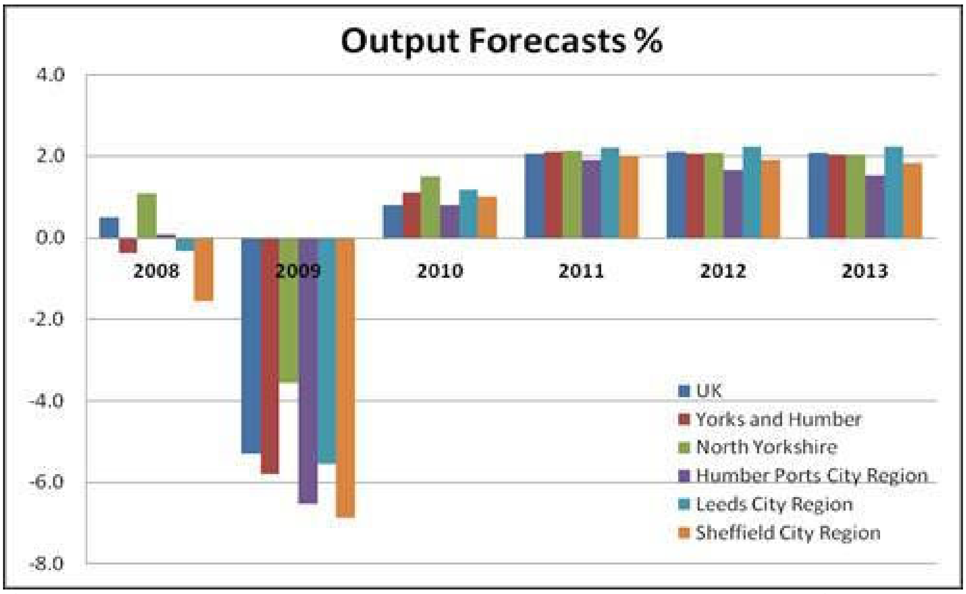


Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

The current output of the Rotherham economy is close to £3.7 billion but productivity per worker or output per capita is significantly lower than the UK average – closing this productivity gap would potentially increase the output of the Rotherham economy to over £4.5 billion. Currently each full-time equivalent worker contributes annually a productivity level of £34,400 to GVA, compared to £42,400 for the UK which equates to over £856 million in lost productivity. Measured by output per capita (output divided by population) the gap is even greater at £909 million.

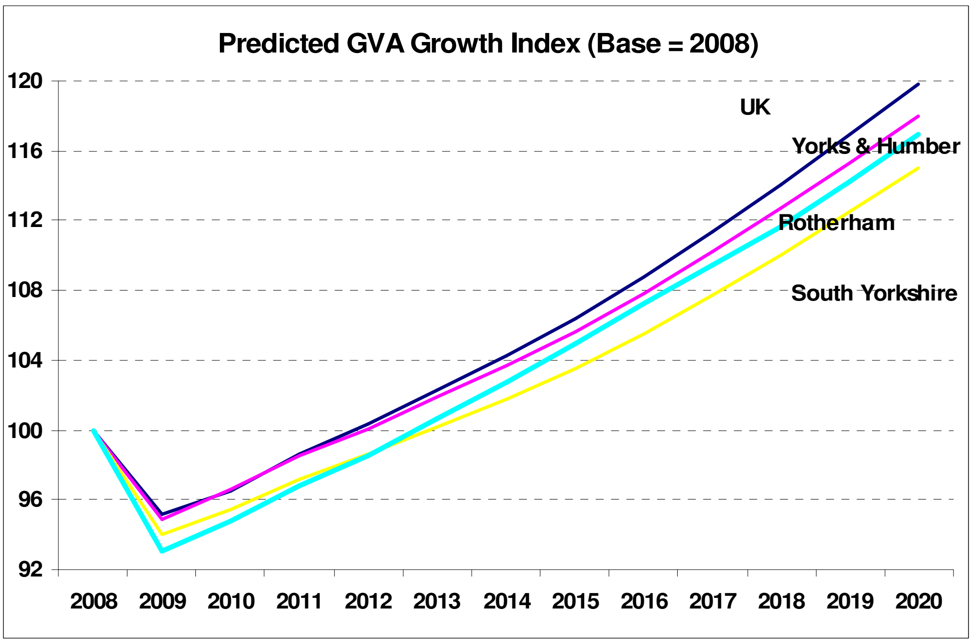
This productivity gap can be closed in a number of ways – Rotherham's economy needs to continue to diversify and modernise; the basic industrial make-up within Rotherham has changed substantially but weaknesses remain with low overall numbers of businesses and a number operating in low value / low skills sectors that are predicted to contract. The skills base of the population needs improvement to compete for the best businesses to locate in Rotherham, which in turn will help towards the necessity of increasing the number of people employed in the local economy, reducing unemployment and increasing economic activity.

Output in Rotherham showed a fall in 2008, the first signs of the national recession impacting on the local economy. Looking beyond this the latest REM projections of output for the region show significant falls during 2009, the Sheffield City region being the worst affected with an estimated fall of over 6%. 2010 is expected to see a very modest rate of growth of around one percentage point for all parts of the region – this is in line with the slow recovery in GDP growth being seen nationally. Beyond 2010 output growth is expected to be at around 2% per annum; this is lower than the rate of growth seen in the years prior to the recession when growth was running at around the 3.0% per annum mark. Sheffield City Region is predicted to experience slightly lower growth than the overall regional and UK rates.



Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

Looking specifically at Rotherham the model suggests that GVA will dip more sharply in the short term than regionally or nationally although stronger growth from 2012 onwards will improve Rotherham's relative position in South Yorkshire and help narrow the gap to the region. However the gap to the UK (and the region) will have increased compared to the 2008 baseline unless Rotherham finds ways to improve its economic performance / productivity above these trend based predictions.



Source: Yorkshire Forward / Experian Regional Econometric Model (Spring 2010)

Enterprise: Key Issues

Business numbers
- Rotherham has traditionally had a below average number of businesses but increase has been above average in the last 10 years
- Despite improvement the rate remains the lowest in South Yorkshire and recession has impacted on overall numbers in 2009

Business structure
- Rotherham has a higher concentration of businesses in the manufacturing and construction sectors compared to the regional / national averages
- Relatively high number in mainly public sector industries (administration, education & health)
- Correspondingly lower concentration in the professional, scientific and technical and information & communication sectors
- Rotherham also relies more heavily on large employers in providing employment

Workplace employment
- The rate of increase in workplace employment in Rotherham for the period 1998 to 2008 is over twice the sub-regional, regional and national averages
- The public sector, banking, finance & insurance, and distribution sectors are now more important than manufacturing in Rotherham in providing employment.

Business births and survival
- The business birth rate has been similar to or just below the sub-regional average in recent years, but well below the regional and national rates.
- 3-year enterprise survival rates higher than the regional average

Innovation and self-employment
- Workplace employment in Knowledge Intensive sectors has grown faster than regionally / nationally, closing the gap.
- Self-employment has remained at a similar level in recent years, below regional / national average

GVA
- High growth in Rotherham over the last 10 years but significant productivity gap to UK average
- Financial & Business Services sector has seen the highest growth but falls in some manufacturing sectors
- Output gap to the UK is forecast to grow unless productivity in Rotherham can be improved – i.e. need to diversify / modernise economy, increase business base, raise skills, increase employment and economic activity.

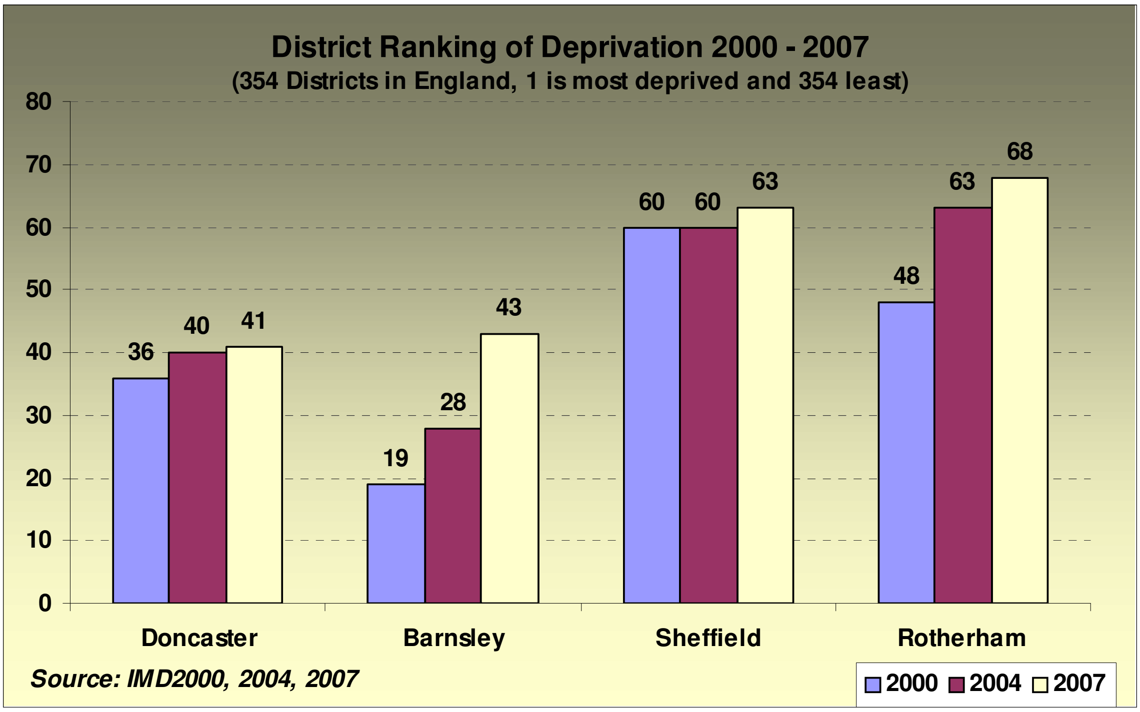
INCLUSION

Whilst it is obviously important for the strength and wealth creation within the overall economy to improve it is also important to ensure that all communities benefit from any improvement. The recovery in Rotherham from the closure of the borough's coal mines and traditional industries has been substantial but disadvantaged communities and groups still exist across the borough.

Index of Multiple Deprivation (IMD):

The main measure of disadvantage is the Index of Multiple Deprivation (IMD), which has replaced previous similar measures. There have been three IMD data sets published in 2000, 2004 and 2007 - these are not directly comparable as domain indicators have changed over time, though they all use the same domains[38] that comprise the index. They are largely used as relative comparators, ranking areas in England, and are useful because they provide information at small area level, such as lower super output area (LSOA) for 2004 and 2007, and at ward level for 2000.

Between 2000 and 2007 Rotherham's overall deprivation ranking[39] improved by 20 places from 48th most deprived district to 68th most deprived suggesting that the strong economic growth in this period helped reduce overall levels of deprivation. Other South Yorkshire districts also saw improvements in this period -



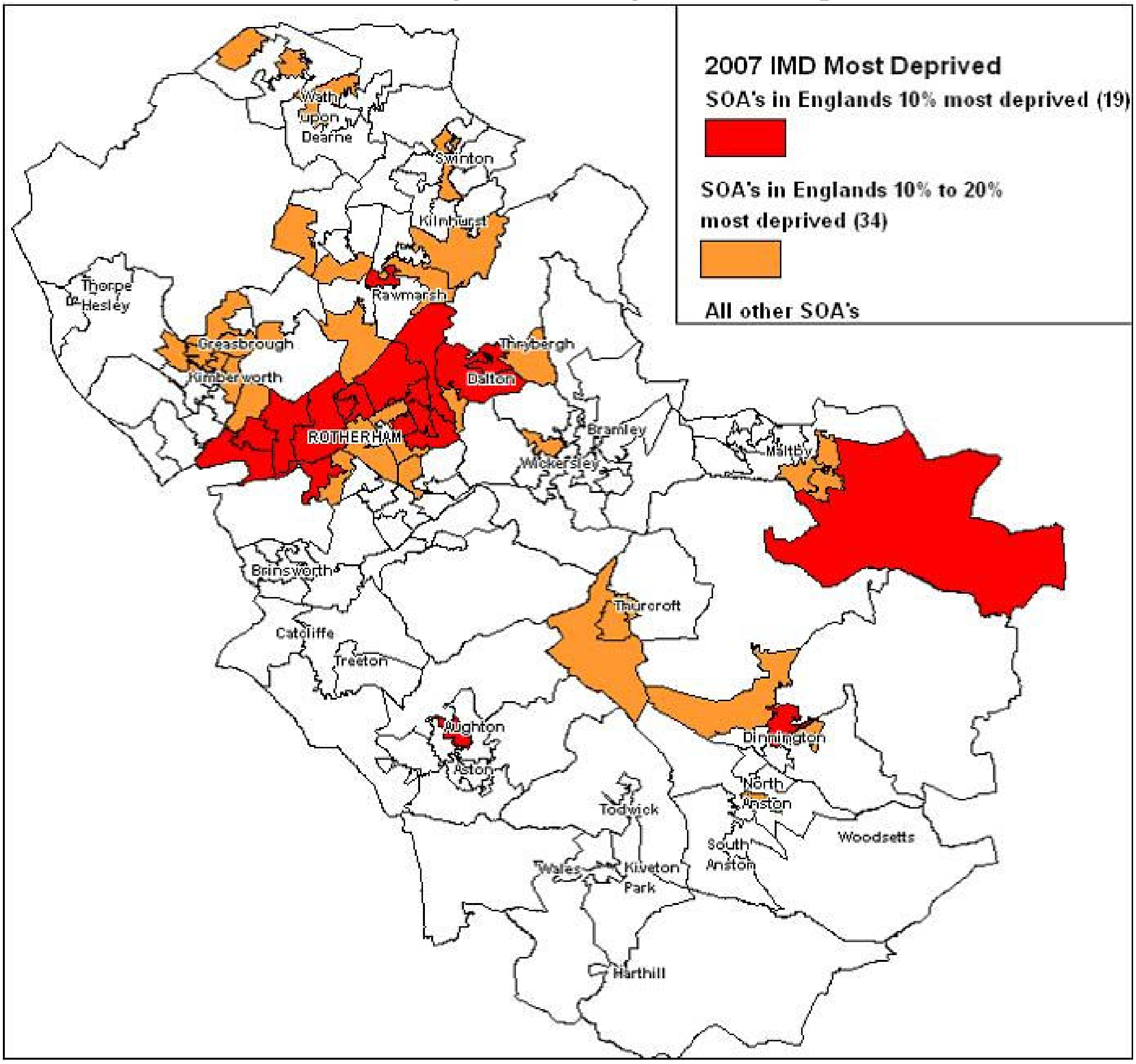
[38] *The Domain Indices are: Income, Employment, Health Deprivation and Disability, Education, Skills and Training, Barriers to Housing and Services, Crime, Living Environment*
[39] *Rank of average IMD score out of 354 England districts, 1 being most deprived*

However a significant number (19 or 11.4%) of the borough's 166 Lower Super Output Areas (LSOA's) still fall within the top 10% most deprived in England with 53, or almost a third, falling within the top 20% most deprived.

Super Output Areas - most deprived in England per South Yorkshire District						
	Total SOA's in borough	Number of SOA's in top 10% most deprived	Percentage of borough SOA's	Number of SOA's in top 20% most deprived	Percentage of borough SOA,s	Highest ranking SOA (i.e. most deprived)
Rotherham	166	19	11.4%	53	31.9%	541
Barnsley	147	27	18.4%	56	38.1%	360
Doncaster	193	41	21.2%	73	37.8%	22
Sheffield	339	81	23.9%	123	36.3%	81
South Yorkshire	845	168	19.9%	305	36.1%	
Source: IMD 2007						

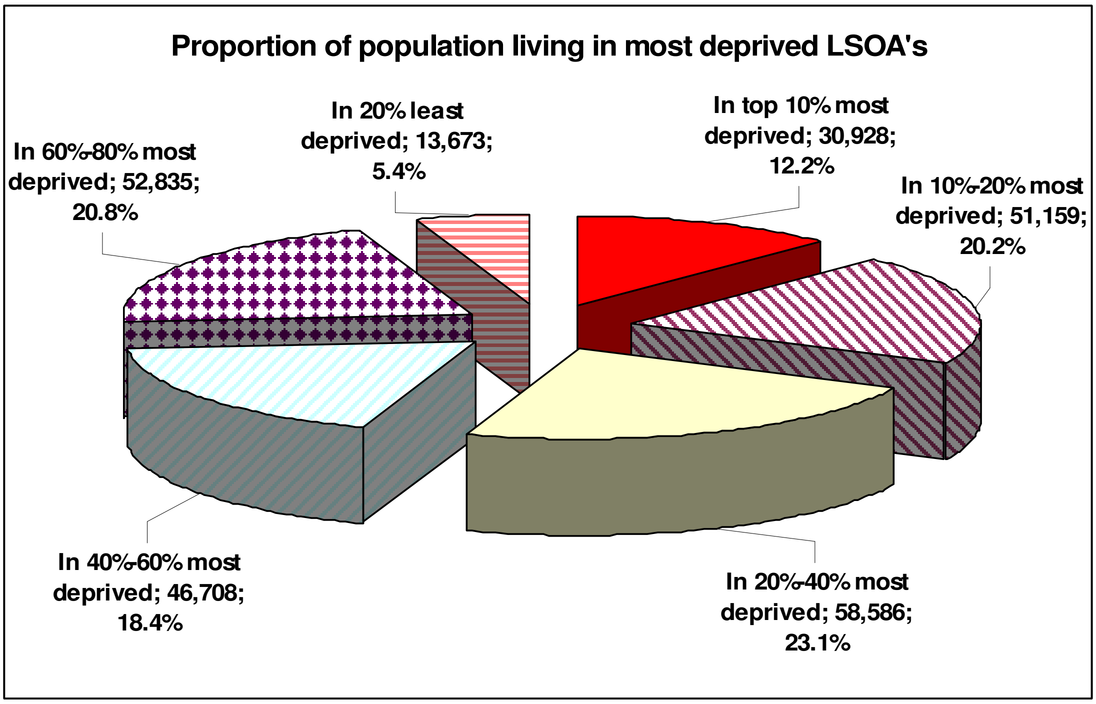
The red areas on the map below show those communities falling into the top 10% most deprived areas in England, those falling into the top 10-20% are shown as amber -

Rotherham (LSOA) IMD Ranking Areas in England Most Deprived 10% / 20%



Communities at the most deprived 10% England level in Rotherham are at Aughton, Dinnington, Maltby (west), Rawmarsh (centre) and a large area roughly aligned with the A630 corridor from the M1 in the west, through the town centre, and out to Dalton and Thrybergh in the east.

In population terms this equates to almost 31,000 people, or over 12%, of residents in Rotherham living within areas ranked in the top 10% most deprived nationally and an additional 51,000, or over 20%, living in areas ranked within the top 20% most deprived.



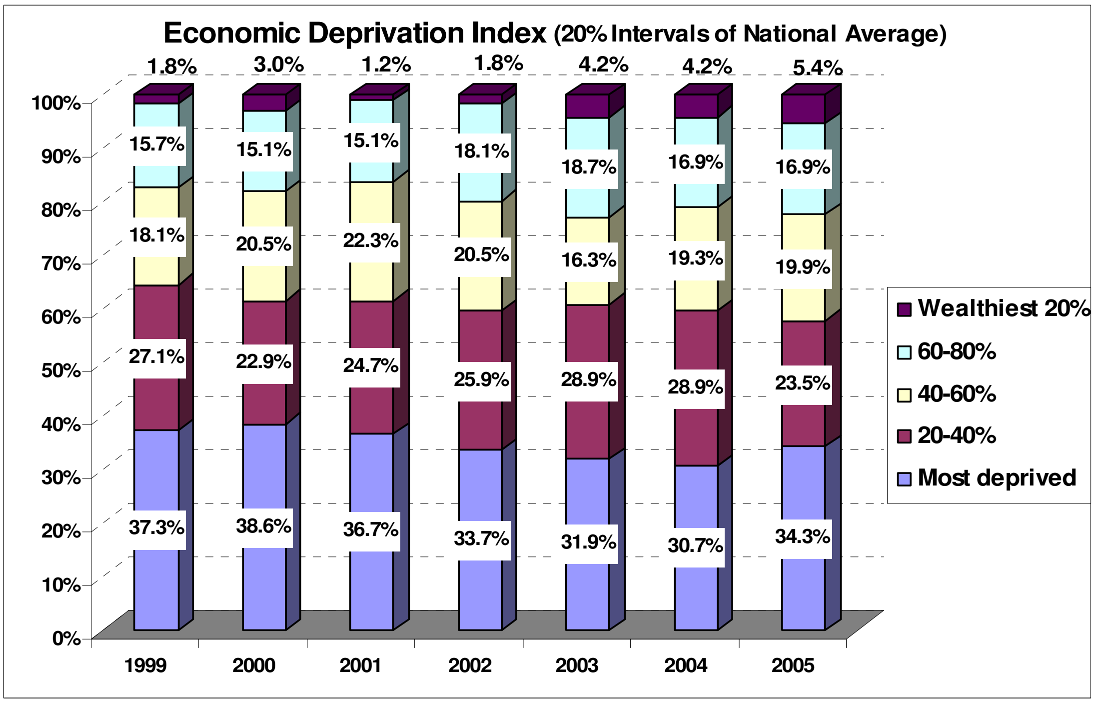
Source: IMD 2007

Economic Deprivation Index (EDI):

The Economic Deprivation Index (EDI)[40] covers the period 1999 to 2005 and can be used to track changes over time at a LSOA level. The EDI has only two domains covering income and employment, making it more appropriate as an economic measure of deprivation. At a local authority level the EDI shows a similar improvement to the IMD with Rotherham improving from 53rd in 1999 most deprived to 61st in 2005.

Looking at the ranking change of the LSOA's within Rotherham shows that 122, or 73.5%, have improved their relative ranking whilst 44, or 26.5%, have seen their relative ranking worsen. The change, by 20% intervals of the national average, is shown below –

[40] *The Economic Deprivation Index 2009, Produced by the Social Disadvantage Research Centre (SDRC) at the University of Oxford for CLG*



Source: Economic Deprivation Index 1999-2005

The percentage of LSOA's in the most deprived 20% nationally and most deprived 40% have fallen with corresponding increases in the less deprived / wealthier ranked areas.

Looking at the individual domains it is clear that deprivation in the employment domain remains more prevalent with over 37% of LSOA's ranked within the top 20% most deprived compared to 27% of LSOA's similarly ranked within the income domain. At the other extreme 13.3% of LSOA's are ranked in the 20% wealthiest areas in the income domain but only 1.2% under the employment domain.

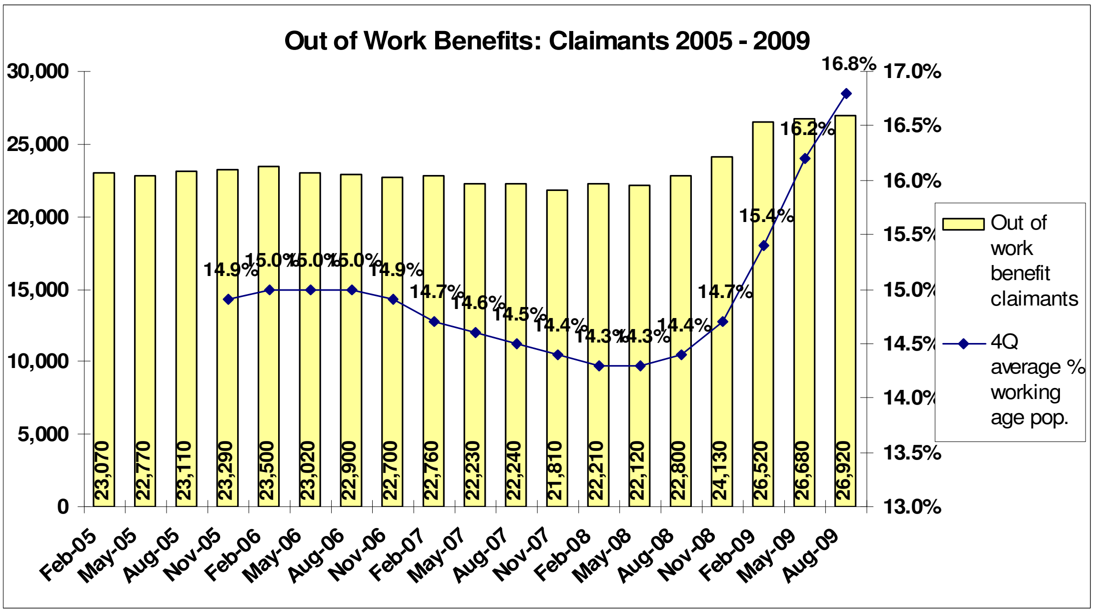
EDI Income Domain Distribution (% of LSOA's)							
	1999	2000	2001	2002	2003	2004	2005
Most deprived	30.7%	30.7%	29.5%	27.7%	26.5%	25.9%	27.1%
20-40%	29.5%	25.3%	26.5%	28.9%	28.9%	27.7%	25.9%
40-60%	13.3%	16.3%	15.7%	13.3%	15.1%	15.1%	15.7%
60-80%	17.5%	20.5%	19.9%	19.3%	18.1%	19.9%	18.1%
Wealthiest 20%	9.0%	7.2%	8.4%	10.8%	11.4%	11.4%	13.3%
EDI Employment Domain Distribution (% of LSOA's)							
	1999	2000	2001	2002	2003	2004	2005
Most deprived	42.8%	42.2%	42.2%	41.6%	41.6%	37.3%	37.3%
20-40%	26.5%	25.9%	27.7%	25.3%	23.5%	27.7%	27.7%
40-60%	22.9%	23.5%	22.9%	23.5%	21.1%	21.7%	21.7%
60-80%	7.8%	8.4%	7.2%	9.6%	13.3%	12.0%	12.0%
Wealthiest 20%	0.0%	0.0%	0.0%	0.0%	0.6%	1.2%	1.2%

It is important to remember that both the EDI and IMD are now several years old and any ranking gains in both are likely to have changed significantly since 2008 due to the impact of the recession.

Out of Work Benefits:

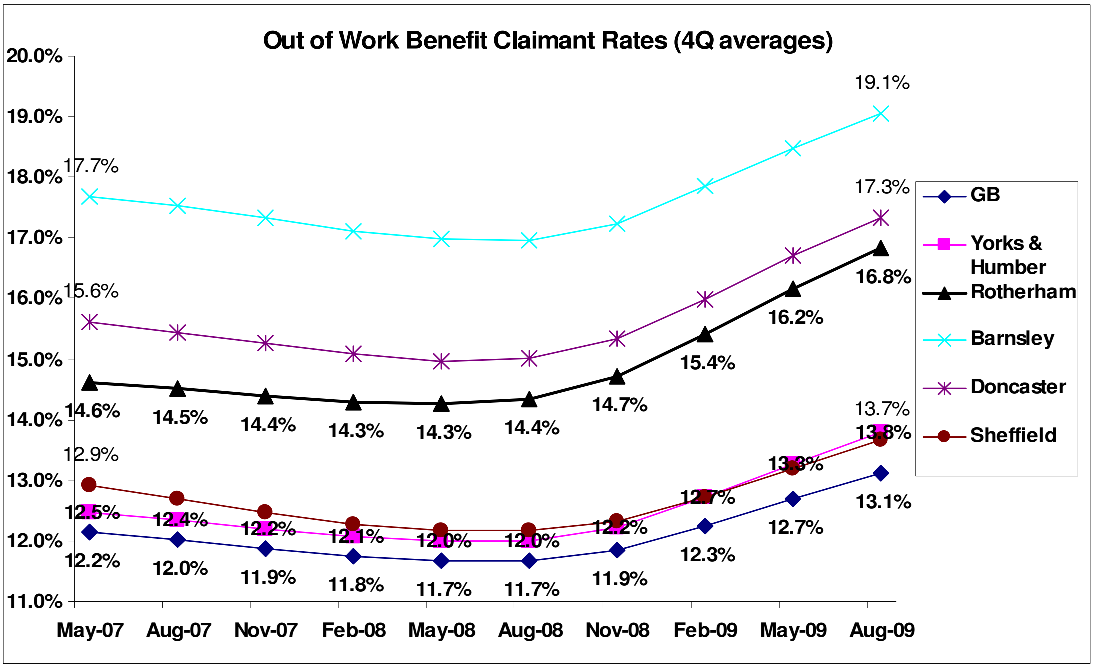
Out of work benefits are those work related benefits which people will receive when not in paid employment. These benefits comprise Job Seekers Allowance (JSA), Incapacity Benefit (IB) / Employment and Support Allowance (ESA, which replaced IB in 2008), lone parent, and other related income benefits. The last two are components of Income Support.

After gradual falls over the last few years the total number on out of work benefits have seen a sharp rise (new National Indicator NI 152) -

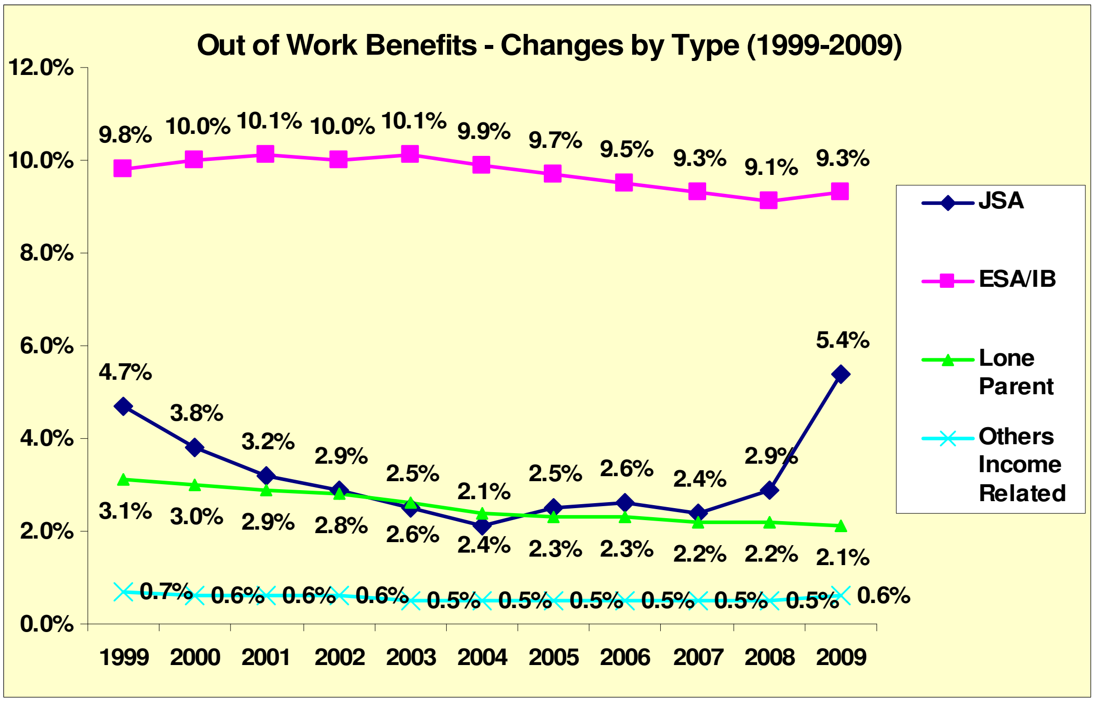


Source: NOMIS, DWP Benefits

This rise is also reflected in other districts of South Yorkshire and at the regional and national levels –

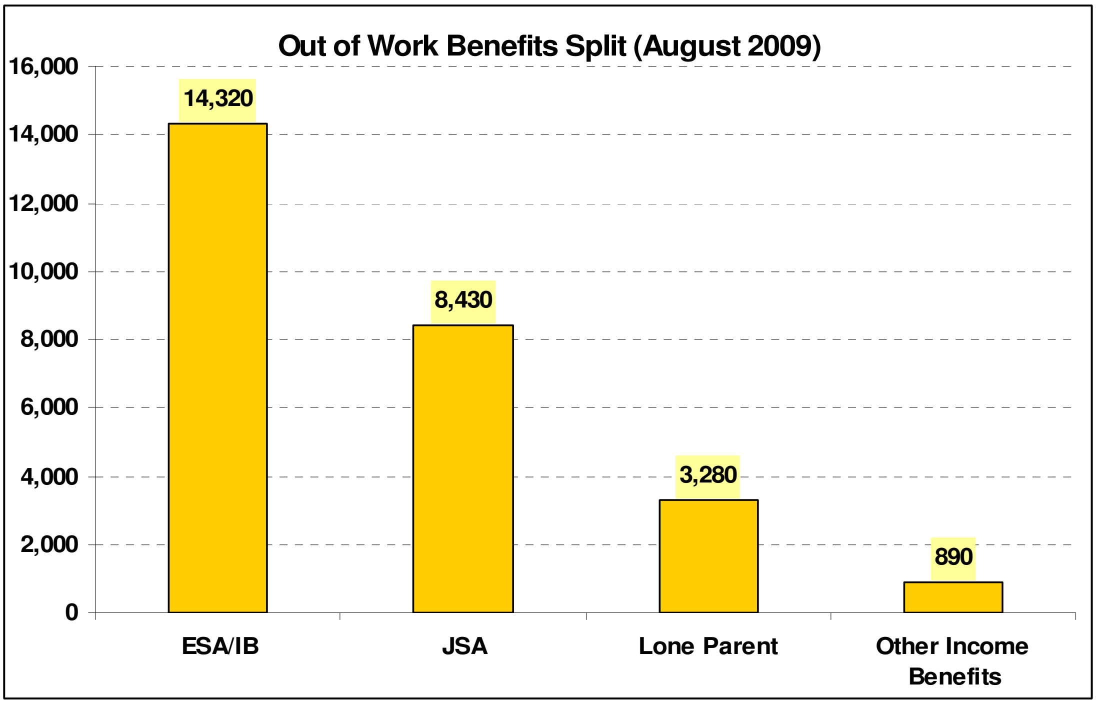


The recent large rises in out of work benefit claimants as been driven by the increase in people claiming JSA as unemployment increased (see employment section for details).



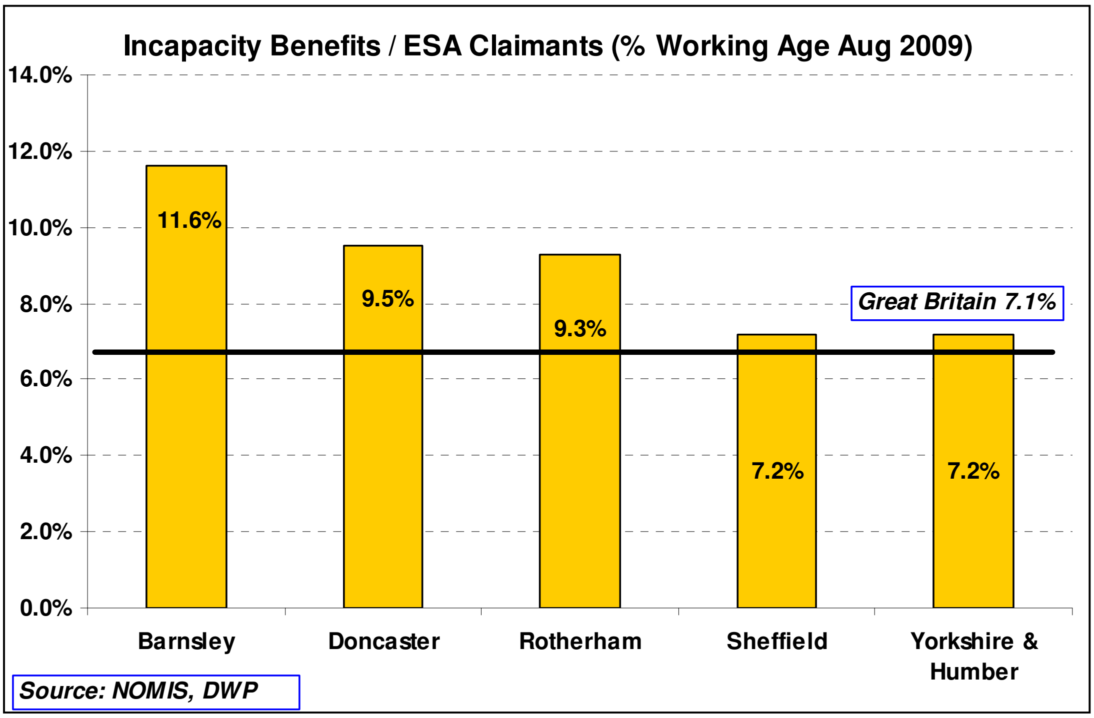
Source: NOMIS, DWP Benefits

Claimants of ESA/IB and lone parents have actually been falling during most of this period but despite this, and the recent increase in JSA claimants, well over half (53.2%) of all out of work benefit claimants are accounted for by those claiming ESA/IB.



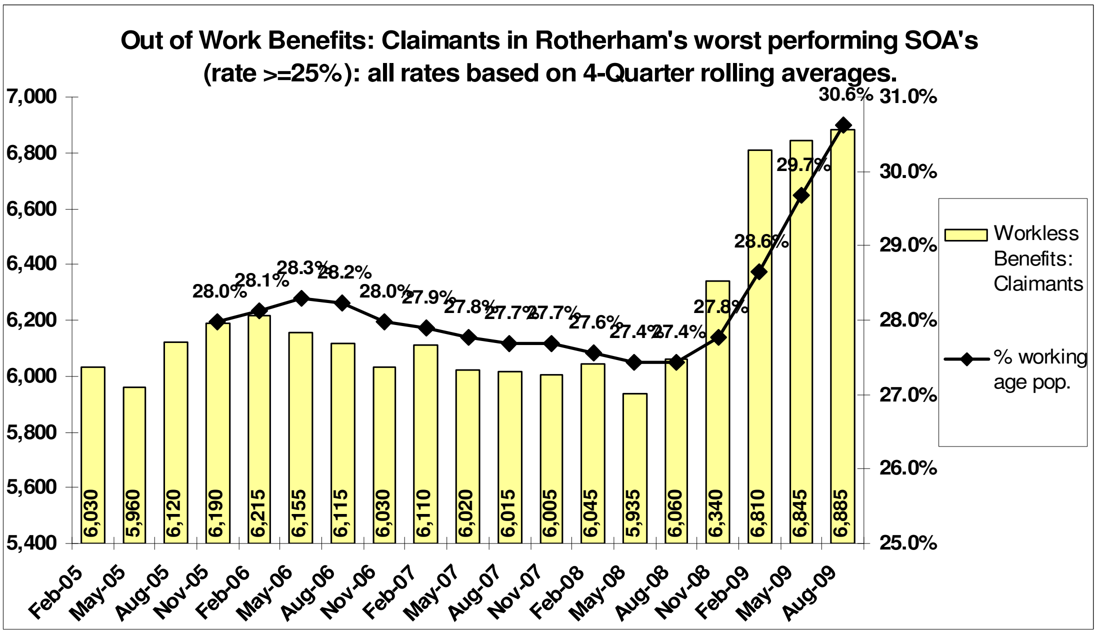
Source: NOMIS, DWP Benefits

Rotherham has 9.3% of its working age population claiming incapacity benefit / employment and support allowance, well above the regional and national rates. Rotherham would need to reduce the numbers claiming this benefit by well over 3,000 to reach the national average.



Only Sheffield within the sub-region is close to the national average on this measure, with Doncaster and Barnsley worse than Rotherham, partly due to a legacy of past reliance on coal / heavy industry for employment.

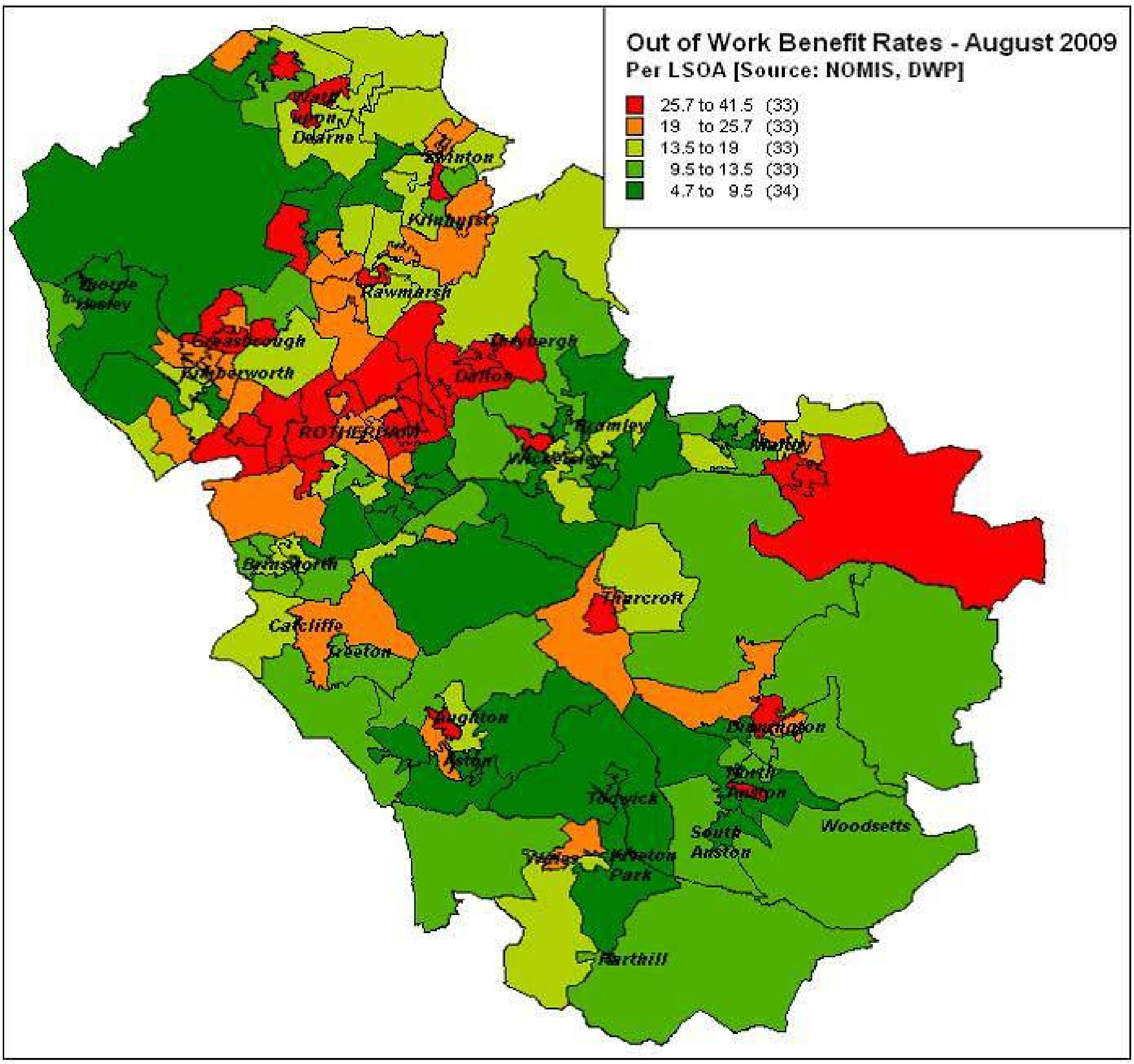
Numbers on out of work benefits are also available at the LSOA level, graph below shows the increase in those areas which had a rate of over 25% at 2007 baseline (new National Indicator NI 153) -



Source: NOMIS, DWP Benefits

This shows a similar pattern to the overall increase but from the baseline of May 2007 the increase in the worst performing LSOA's has been 2.8 percentage points compared to a 2.2 percentage point increase overall suggesting that the gap to more deprived areas may be widening.

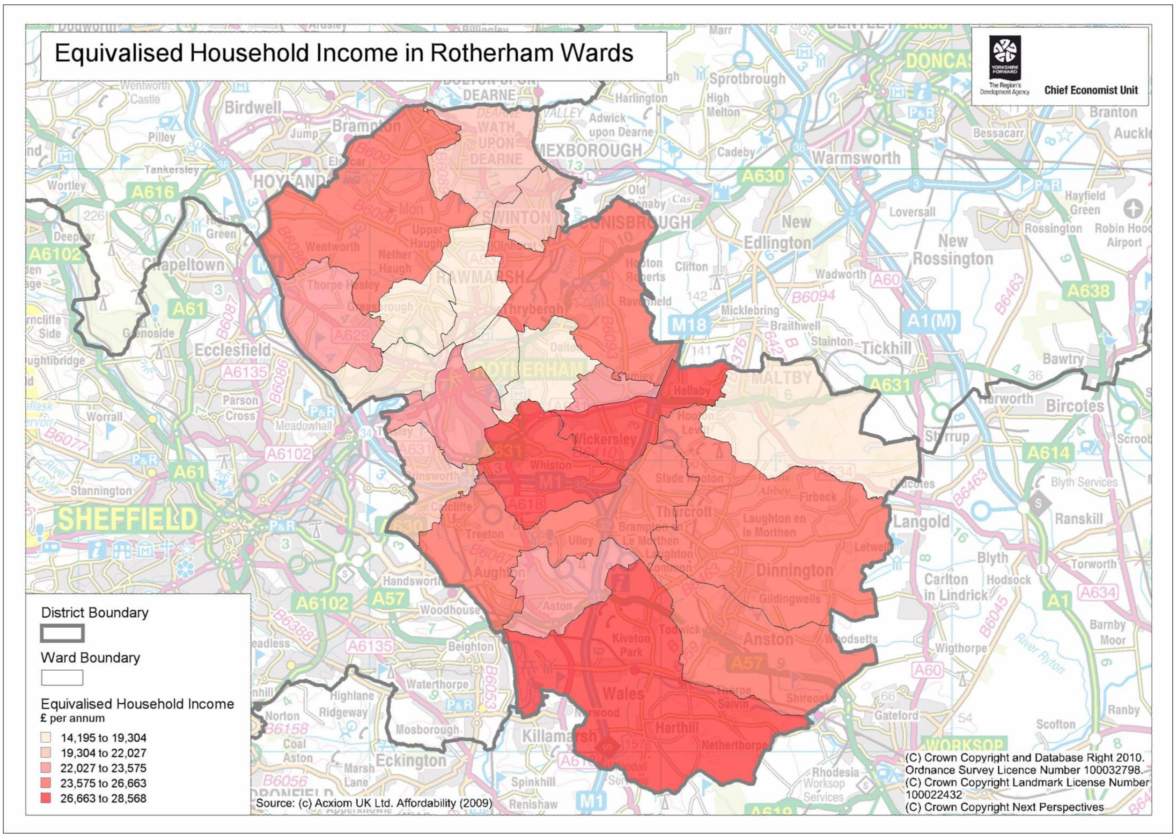
Analysis of the workless benefits rates for LSOA's highlights areas which have a very high number of claimants of out of work benefits – rates vary from as low as 4.7% of the working age population (area around Moorgate) to as high as 41.4% of the working age population (area around East Herringthorpe).



Household Income / Affordability:

Yorkshire Forward have recently worked with Acxiom to develop a new product – "Affordability" – into a tool that allows us to analyse household economic status across the region and for local authorities. This includes data on income, spend on essentials and indulgences, levels of debt, pensioner income and standard of living to name but a few. A summary of some of the findings for Rotherham is shown below –

- Equivalised Average Household Income[41] - average household income for Rotherham is £27,017, (76% of the England average household income). If this income is equivalised i.e. takes into account the household structure, then the true spending power available to households in the district is lower at £21,857, which is 70% of the England average household equivalised income.



- Discretionary Income[42] - Average weekly household discretionary income in the district is just over half of the England average - £102 compared to £200 per week - the proportion of net household income that is discretionary is also lower than the average for England (25% v 37%)
- The proportion of adults earning in the district is 55%, lower than the average of 60% for England, however across the district the proportion

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[41] *By taking into account the differences in household structure (i.e. the number of people living under the same roof - single, couple, family) the 'equivalised' average household income is a more relative measure of household income based on how far the money must stretch.*

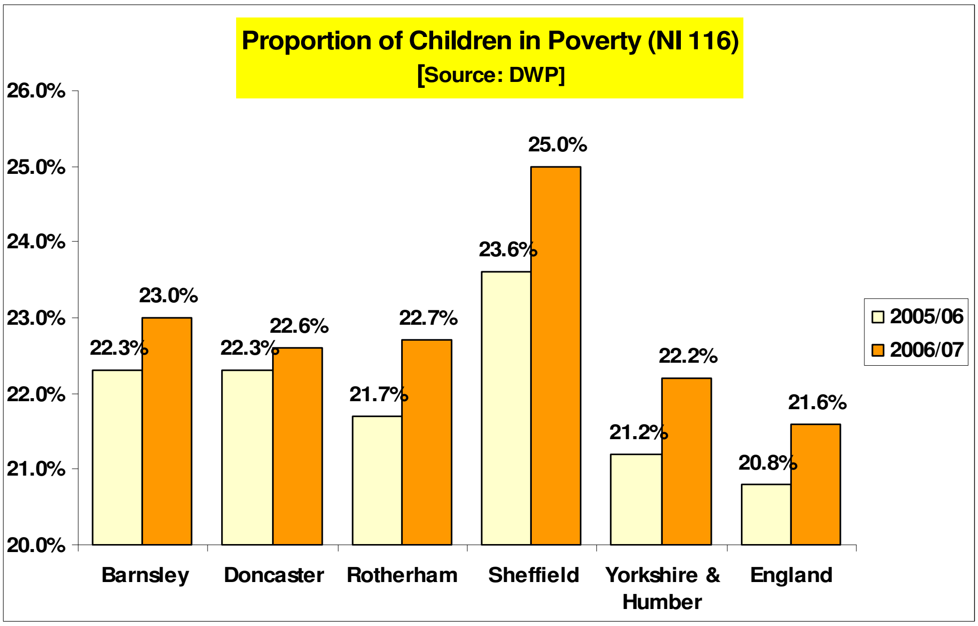
[42] *Income remaining after deducting the income committed to meet fixed costs such as rent/mortgage and other costs necessary to sustain an acceptable standard of living i.e. food, petrol, toiletries.*

ranges from a high of 61% in Hellaby ward down to 44% in Rotherham East ward.

- Standard of Living[43] - On average 25% of households across England are living below an acceptable standard of living and in Rotherham the proportion is 34%, which means approximately 36,000 households in the district are managing on less than the minimum income needed to achieve an acceptable standard of living. (55% of households in Rotherham East ward are living below this acceptable standard of living compared to 19% of households in Sitwell ward).

Child Poverty

High levels of worklessness and low incomes in an area can impact particularly hard on the children living in these households. A new national indicator (NI 116) measures the proportion of children in poverty by looking at the number of children who live in families in receipt of out of work benefits and working families whose income is below 60% of the median income. The count of children (under the age of 16) is established from Child Benefit/Child Tax Credit claims, which cover approximately 98% of children. Data is only currently available for two years 2005/06 and 2006/07 –



The proportion of children in Rotherham living in poverty is above that of the region and nationally but is slightly below other South Yorkshire districts (well below that in Sheffield). It is interesting that for all geographies the position has worsened between 2006 and 2007 – given the economic downturn and rising unemployment which began in 2008 the situation is likely to have deteriorated further since this last data.

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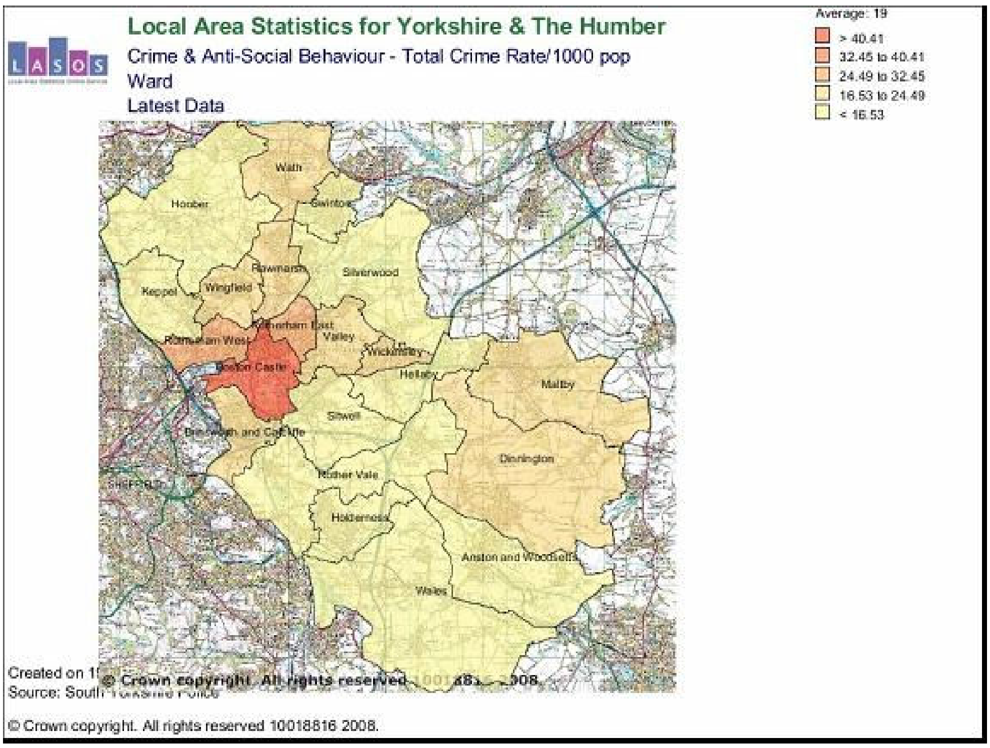
[43] Standard of Living – the Acxiom Standard of Living has been derived by reviewing a combination of household net income and household outgoings in relation to the MIS (Minimum Income Standard) 2009. For more information on the Minimum Income Standard 2009 go to http://www.minimumincomestandard.org

Crime:

It is widely recognised that there is a link between the levels of deprivation in an area and the level of crime experienced by households in that area. It is however a complex relationship and the impact on levels of crime from the expected increase in deprivation (primarily due to increasing levels of unemployment) due to the current recession are unknown. In recent years Rotherham has seen relatively low levels of overall crime being well below the South Yorkshire average. The most recent quarter’s data in the table below shows this to be the case, with a crime rate above Barnsley but well below the rest of the sub-region. The rate for anti-social behaviour is relatively higher but still remains below the South Yorkshire average.

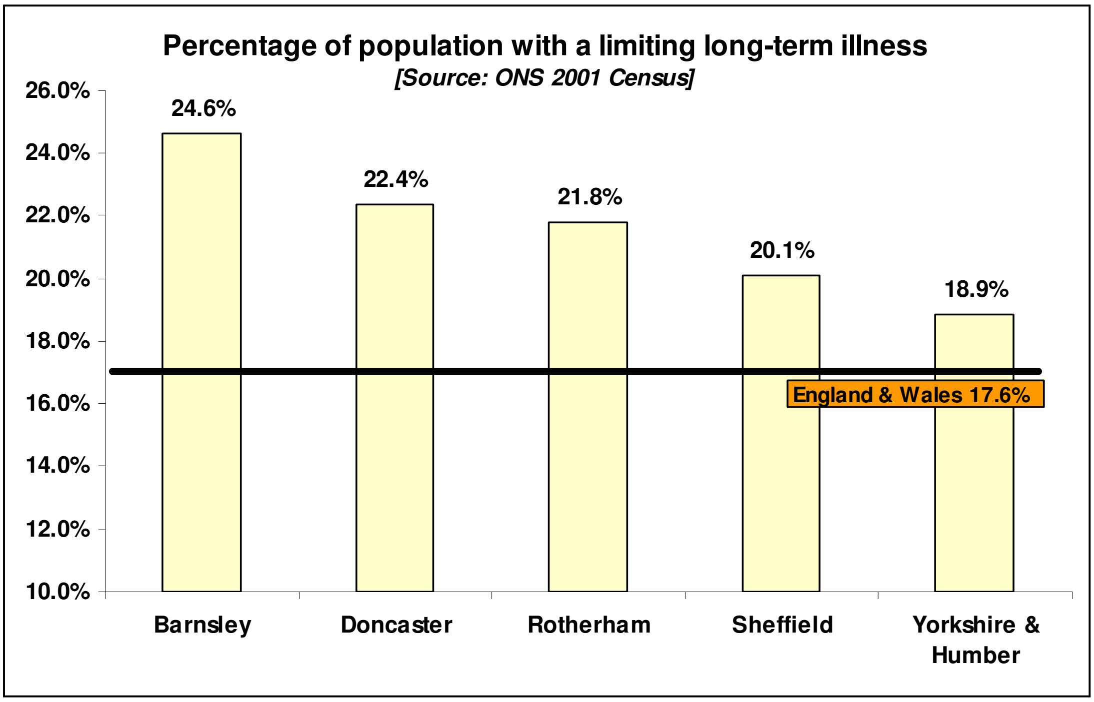
CRIME & ANTI-SOCIAL BEHAVIOUR RATES (South Yorkshire 2009/10 Q1)				
	Total Crime	Total Crime Rate / 1,000 pop	Anti-Social Behaviour	Total ASB Rate / 1,000 pop
Barnsley	3,692	17.73	4,464	19.87
Doncaster	6,985	24.00	6,854	23.55
Rotherham	4,771	18.83	6,075	23.97
Sheffield	11,088	20.91	14,644	27.61
South Yorkshire	26,536	20.64	32,037	24.65
Source: South Yorkshire Police				

Crime rates are not the same across the borough with the map below highlighting those wards with above average levels of crime – many of these do have relatively higher levels of deprivation within them. Boston Caste has a very high overall crime rate due to including Rotherham town centre; a high concentration of retail premises and leisure destinations (clubs, pubs, etc) will result in significantly higher levels of crime compared to predominantly residential areas.



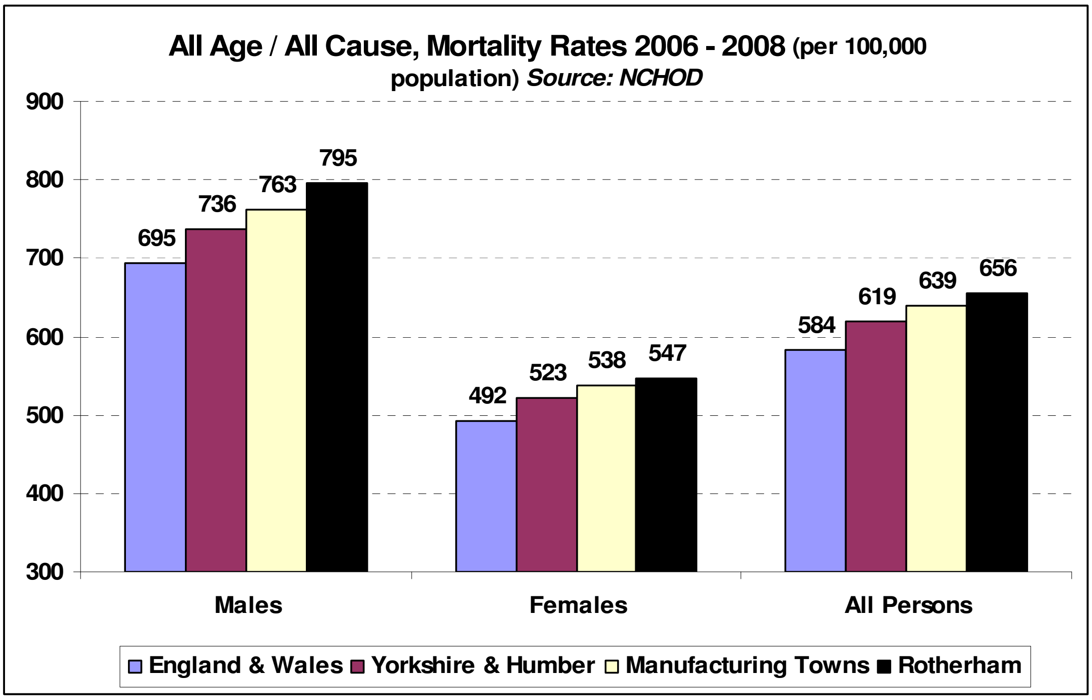
Health:

Rotherham and South Yorkshire in general has a significantly higher proportion of the population suffering from ill health. Data from the census shows a much higher percentage suffering with a long-term illness.



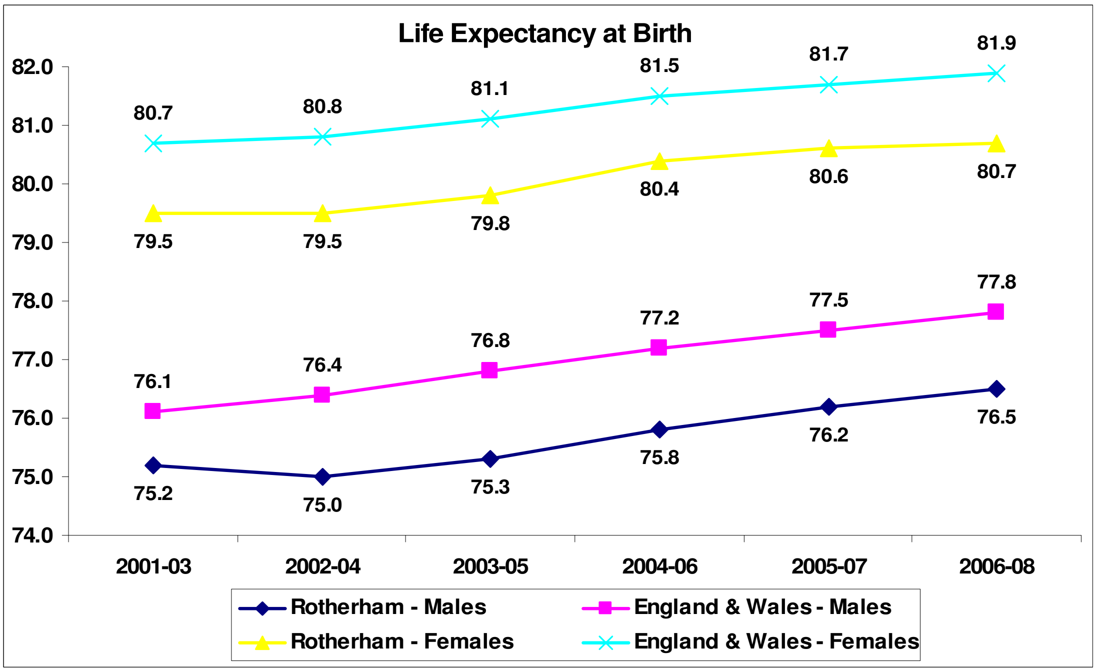
This is in part most likely due to the industrial legacy of the sub-region, with a large proportion of the population working within traditional heavy industries such as steel and coal mining which can have long-term impacts on health. This is reflected in the comparative mortality rates[44] with the rate (expressed as number per 100,000 population) in Rotherham well above both the national and regional averages. Even when compared to other 'Manufacturing Towns'[45] the rate remains higher. This is true for both males and females, although the gap for mortality rates to the national average is higher for males than for females.

[44] *Data are based on the original underlying cause of death and age standardised*
[45] *ONS Area Classification Group (2001 Census based)*



With Rotherham's economy having diversified over recent years the numbers working within traditional heavy industry have fallen significantly and going forward other factors, such as obesity and lifestyle, are likely to be the major factors impacting on the health of local people.

Life expectancy of for both males and females in Rotherham has been improving as shown in the graph below but the average life expectancy for both remains over one year less than the national average.



Inclusion: Key Issues

Deprivation

- Overall deprivation appears to be reducing with Rotherham improving from 48th most deprived local authority in 2000 to 68th most deprived by 2007.
- But almost 31,000 people, or over 12%, of residents in Rotherham still live within areas ranked in the top 10% most deprived nationally and an additional 51,000, or over 20%, live in areas ranked within the top 20% most deprived.
- The Economic Deprivation Index shows that over 37% of the borough remains within the top 20% most deprived nationally for employment.

Worklessness

- Total out of work benefits had been falling but since the start of the recession in mid-2008 worklessness rates have risen sharply.
- Increase in overall worklessness due to rising Job Seekers Allowance claimants but Incapacity Benefit / Employment Support Allowance claimants still account for over half of all workless benefit claimants.
- Gap appears to be widening between the best and worst performing areas with highest rate of worklessness now over 40%.

Income / Affordability

- Equivalised Average Household Income in Rotherham is just 70% of the England average.
- In Rotherham 34%, or approximately 36,000 households in the district, are managing on less than the minimum income needed to achieve an acceptable standard of living (varying between 55% of households in Rotherham East ward compared to19% of households in Sitwell ward)
- Although better than the South Yorkshire average child poverty in Rotherham is above the regional / national rates and appears to be increasing

Crime

- Overall crime rates amongst the lowest in South Yorkshire
- The current recession and increasing unemployment may increase levels of crime, particularly in the most deprived areas

Health

- High levels of ill-health across South Yorkshire, partly due to the areas industrial past
- Mortality rates in Rotherham above average, particularly for males
- Life expectancy improving but remains below national rates

LAND, BUILDINGS & INFRASTRUCTURE

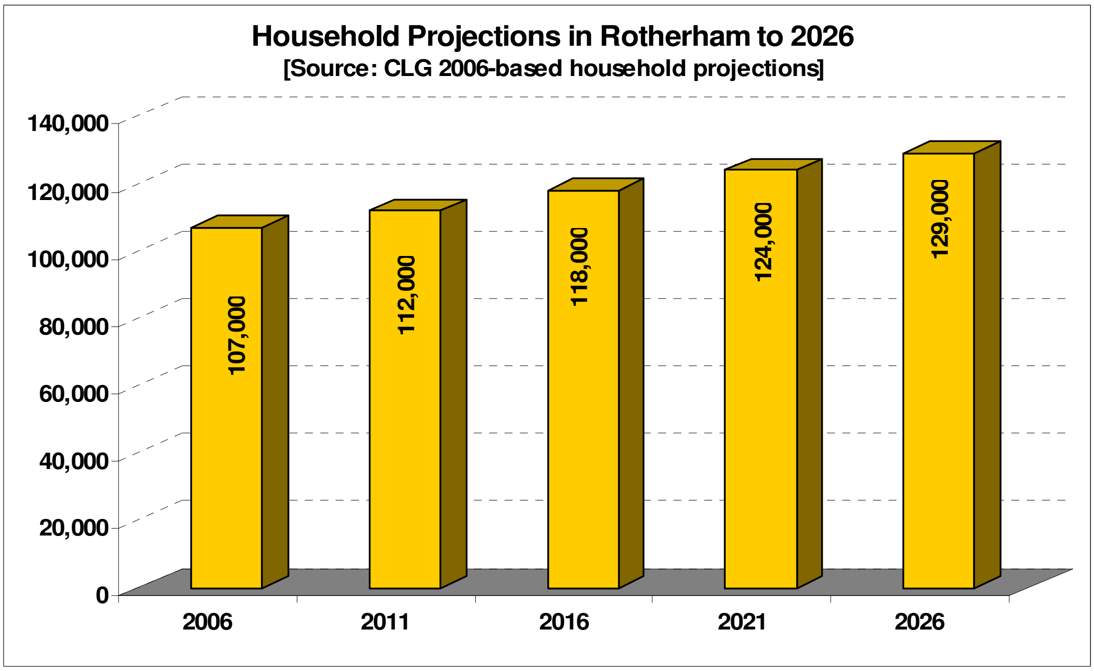
As well as promoting economic growth of the borough we must provide quality, sustainable and mixed community neighbourhoods in order to retain existing residents and attract new workers to locate here. Businesses also expect a good transport infrastructure, an attractive environment, and a good supply of business units and/or developable employment land in the right locations if they are to relocate or invest.

Housing Market:

Despite Rotherham experiencing a fall in population between 1981 and 2001 of around 5,000 people, the number of households in this period increased by over 13,000. The table below clearly indicates that the reason for this was the large increase in one-person households, particularly within the older age groups.

POPULATION - HOUSEHOLD COMPARISONS							
	Population	Households	Density	One-person households			
				All	Percentage	Under pension age	Pensioner
1981	253,200	88,839	2.85	16,235	18.3%	11,110	5,125
1991	253,700	97,854	2.59	22,742	23.2%	14,244	8,498
2001	248,300	102,273	2.43	27,828	27.2%	14,701	13,127
2006*	253,300	107,000	2.37				
2011	259,900	112,000	2.32				
2016	267,800	118,000	2.27				
2021	276,100	124,000	2.23				
2026	283,600	129,000	2.20				
Source: ONS Census 1981/1991/2001, GLG 2006-based household projections							

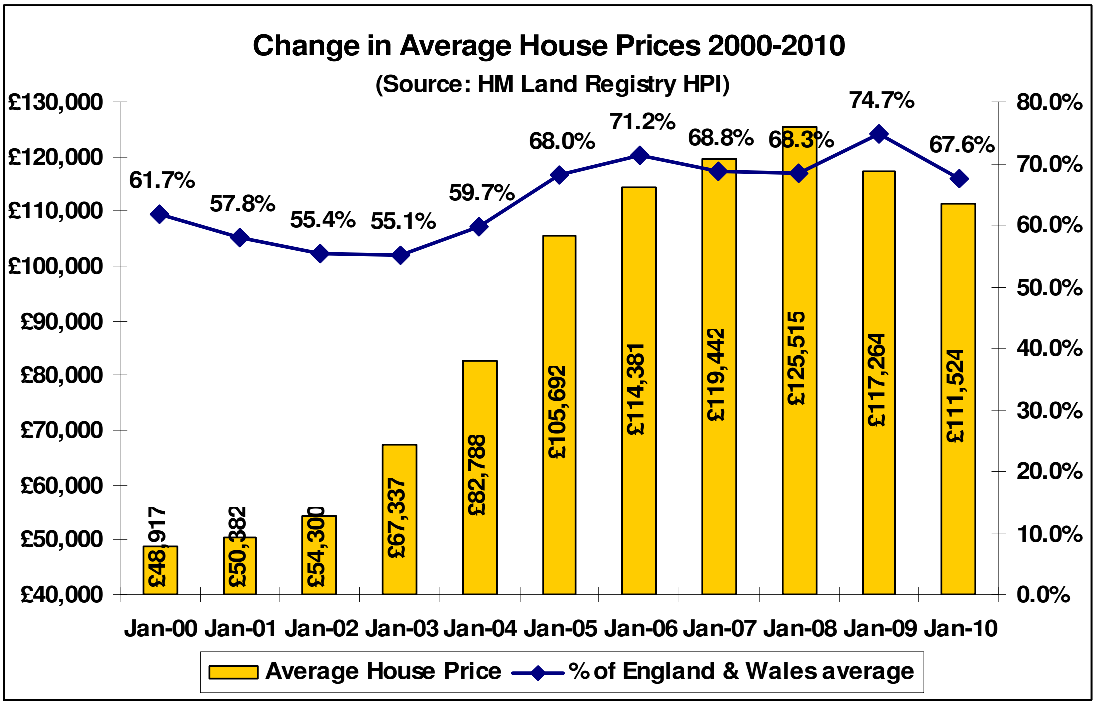
Since 2001 the population has increased and is predicted to continue (as per the ONS 2006 based sub-national population projections). In conjunction with



a predicted continuing reduction in occupation density the latest 2006-based household projections suggest that the number of households in Rotherham will increase to 129,000 by 2026.

**It should be noted that newly revised 2008-based sub-national population projections have recently been released by the ONS which show a smaller rate of population increase than the earlier 2006-based projections. The new projections suggest that the population will be over 9,000 less by the end of the 2027 compared to the old projections. The actual 2008 household projections usually follow some time later (generally several months) but as these, to a large extent, are based on the population projections it is certain that these will also show a fall – using similar density assumptions, a fall of around 4,000 on current projections could be expected.*

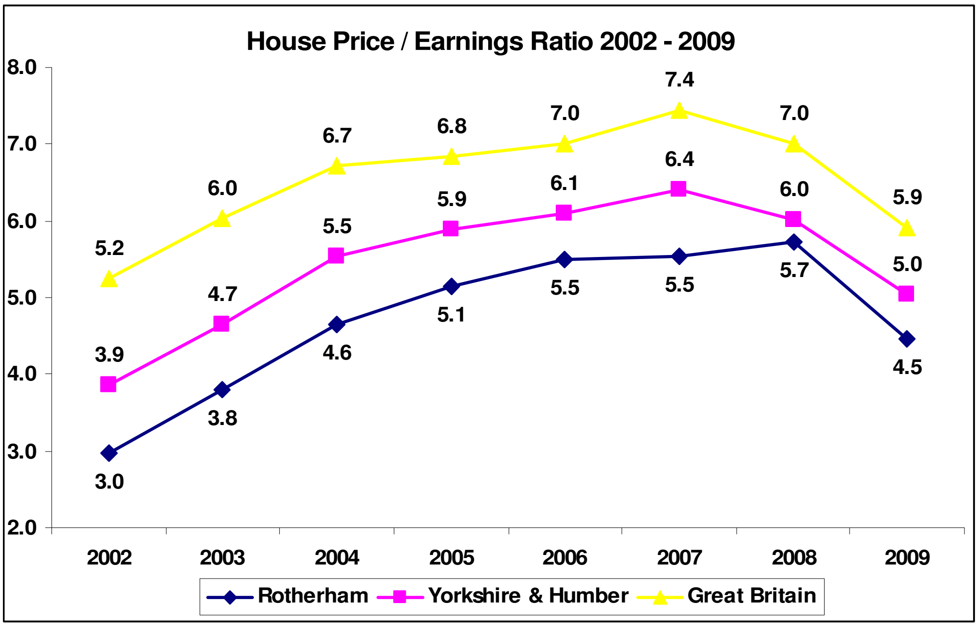
Over the last 10 years the average price of a house in Rotherham has risen significantly by 128%, despite falling back over the last two years from around the start of the recession in mid-2008. Rotherham has followed a similar pattern to changes in the regional and national averages although at a slightly faster rate of increase overall (122% in Yorkshire & Humber, 108% in England & Wales).



The average house price in Rotherham (January 2010) is £111,524, 76.6% of the national average price of £258,105, and 89.3% of the regional average price.

Average House Price Comparison					
	Detached (£)	Semi-Detached	Terraced (£)	Maisonette / Flat (£)	All (£)
Rotherham	191,531	102,498	62,608	81,761	111,524
Yorkshire & Humber	208,315	113,162	79,921	112,287	124,939
England & Wales	258,105	155,962	125,090	157,978	165,088
Source: HM Land Registry January 2010					

Whilst high house prices can be a sign of wealth in the local economy they can also cause problems with affordability – house price to earnings ratios[46] have increased substantially from 2002 although they have fallen back for 2009. The ratio has increased comparatively more quickly in Rotherham than regionally or nationally but house prices in Rotherham remain relatively more affordable.

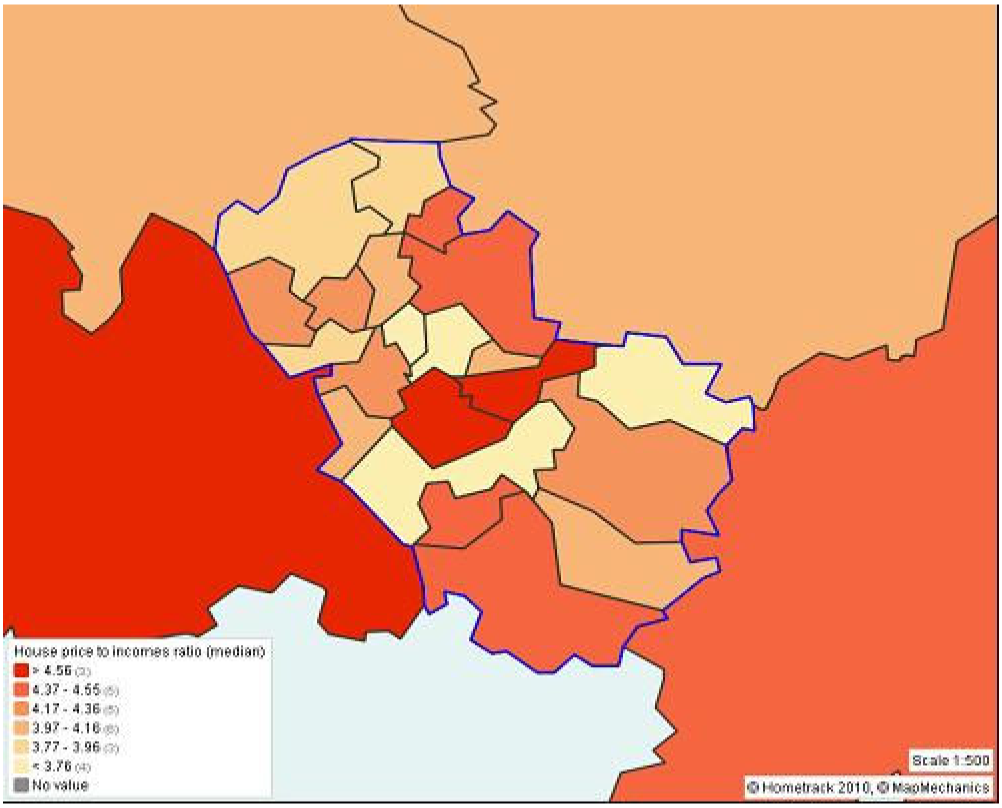


Source: ONS ASHE, HM Land Registry HPI

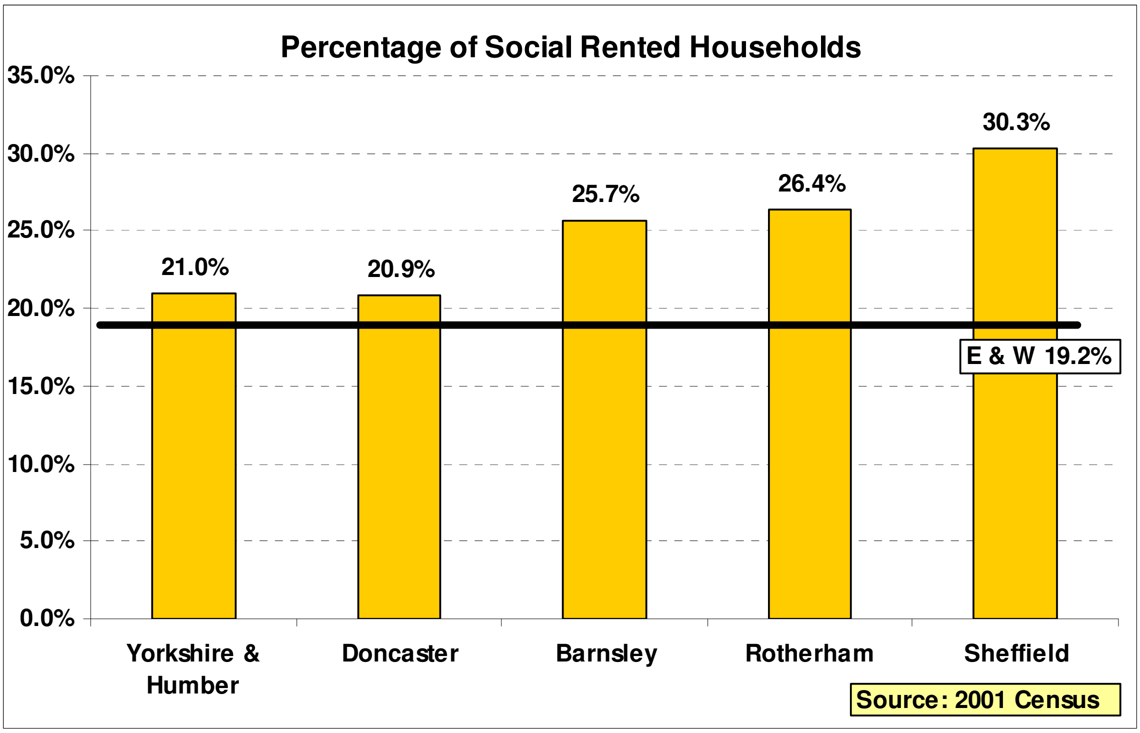
Earnings data relates to a single person in full time employment but the majority of households have more than one earner. Data from Hometrack[47] indicates that affordability in Rotherham based on household disposable incomes is 4.3:1, compared to a regional ratio of 4.8:1. The lower quartile house price to income ratio in Rotherham is 4.9:1

Affordability varies across the borough with some areas having a house price / income ratio above 4.56 as in the map showing ward boundaries below. Wards to the south of the town centre from roughly Moorgate through to Wickersley and out to Hellaby have a higher ratio, reflecting their desirability and high house prices. Other areas, such as the west of Maltby have lower ratios due to less desirable housing and subsequently lower house prices.

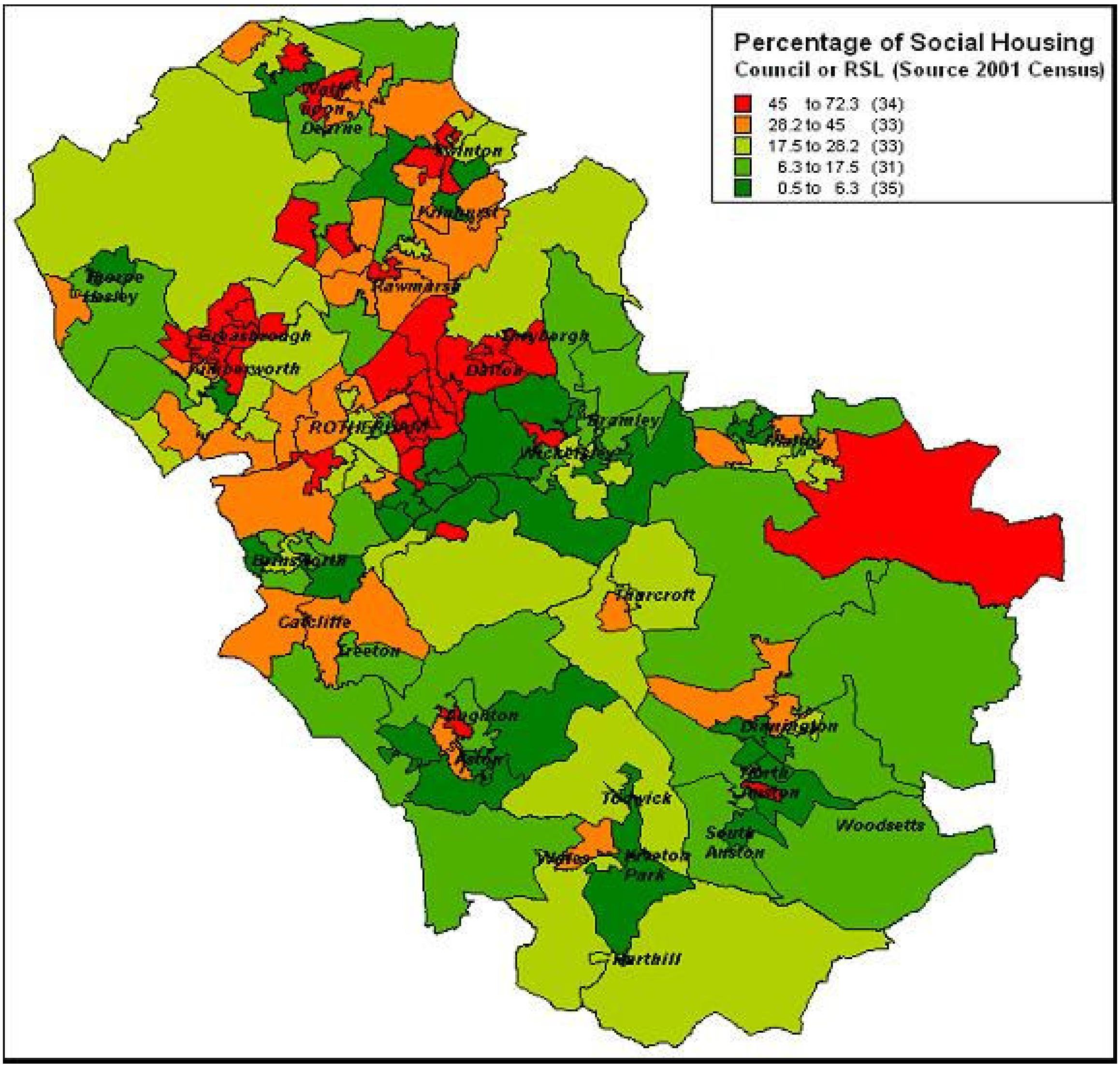
[46] *Earnings taken from ONS ASHE for full-time resident employees, gross median salary. House prices for June each year taken from HM Land Registry House Price Index.*
[47] *Hometrack is the UK's leading provider of residential property and housing information.*



Rotherham has relatively low levels of home ownership compared to the national average with correspondingly high numbers in social rented accommodation, rented from the council and registered social landlords (RSL's). All districts across South Yorkshire are above average in terms of social rented housing -



The map below shows those areas which have the highest levels of social housing by Lower Super Output Area (LSOA), the rate varying from as low as 1% in the Moorgate area to over 70% in two LSOA’s covering the area around East Herringthorpe.

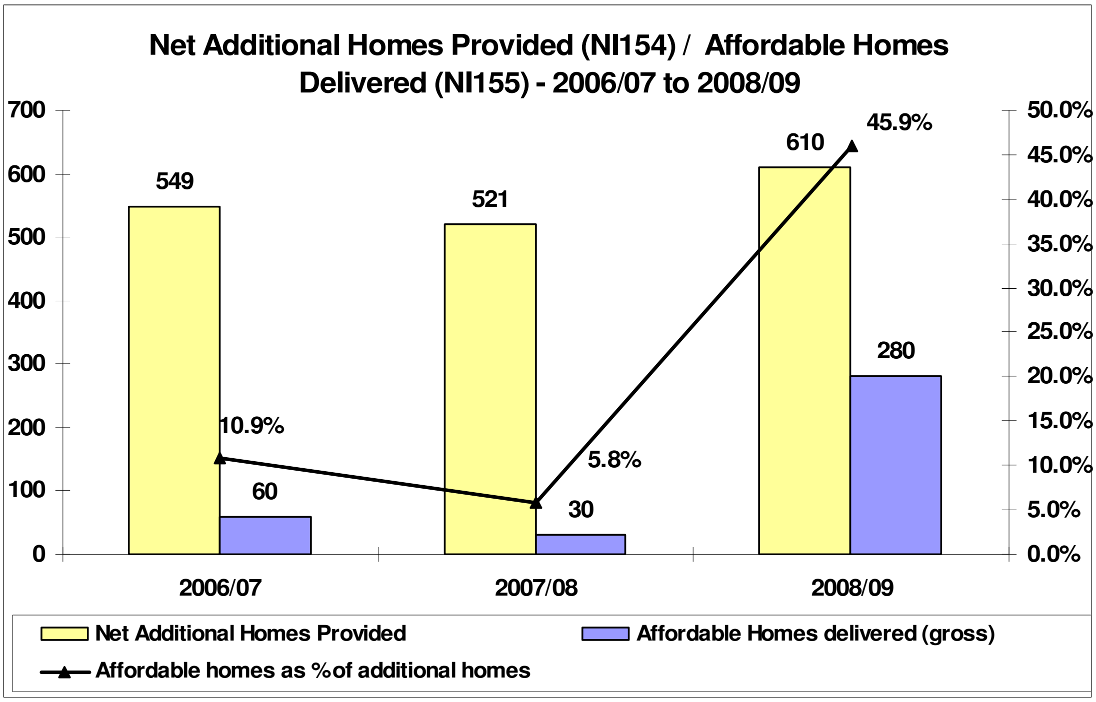


There are 46,000 homes in Rotherham which fall within the South Yorkshire Housing Market Renewal Pathfinder area – a government initiative to change the housing market and attract people back into areas that have become unpopular. This will hopefully help to encourage long-term investment in these areas, broaden housing choice and ensure that house values at least hold their value relative to the prices of housing elsewhere.

Future Requirements:

The Yorkshire & Humber Regional Spatial Strategy 2004-2026 sets out for each local authority within the region an annual net additional[48] homes target – for Rotherham this was 750 between 2004 and 2008, and from 2008 to 2026 this is increased to 1,160 per year. A full housing trajectory showing past performance and an annual requirement to 2026 taking into account actual and projected housing completions is available in the Annual Monitoring Report which forms part of the Local Development Framework.

Performance for the last three years in the provision of new homes (new national Indicator NI 154) and in the number of affordable homes delivered (new National Indicator NI 155) is shown in the chart below –



The number of affordable homes tends to fluctuate widely from year to year but by comparison the percentage of affordable homes delivered for all England in 2008/09 was 33.5% and 20.0% for the region. Obviously by far the majority of new homes are built by the private sector and the economic downturn which began in the middle of 2008 has impacted severely on the house builder / construction sector. The number of housing completions in the next few years will be strongly dependant on how quick the housing market and the wider economy recover.

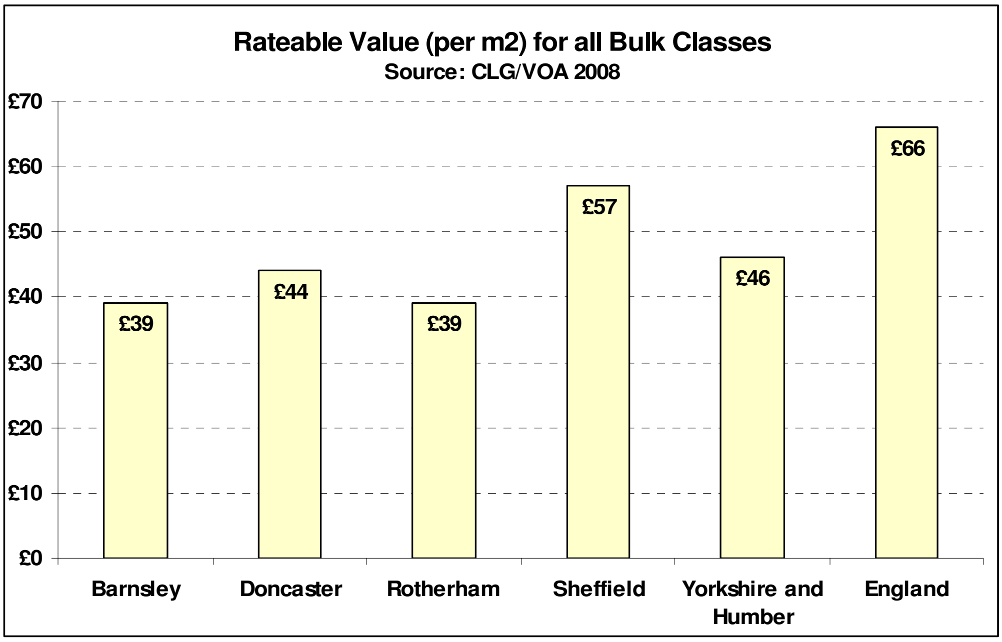
48 *The net increase in dwelling stock over one year is calculated as the sum of new build completions, minus demolitions, plus any gains or losses at the same address. Good performance is typified by an increase in numbers of net additional homes.*

Commercial and Industrial Land & Floorspace:

An overview of the number and types of commercial and industrial premises across the borough can be found from data collected by the Valuation Office Agency (VOA) and processed by Communities and Local Government. This dataset presents commercial and industrial floorspace and rateable value statistics as at 1st April 2008 as classified for the current revaluation period (2005). This dataset provides information on five different types of commercial and industrial premises (known as hereditaments[49]), these are broadly known as 'bulk classes' and include the following premises as shown in the table below -

Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), 2008				
	Count	Floorspace sq m (000's)	Rateable Value £,000's	Rateable Value per sq m (£)
Retail	2,136	428	43,802	£102
Offices (total)	1,070	259	15,279	£59
(Commercial Offices)	*(909)*	*(190)*	*(11,570)*	*(£61)*
(Other Offices)	*(161)*	*(69)*	*(3,709)*	*(£54)*
Factories	1,424	1,645	40,724	£25
Warehouses	732	698	20,911	£30
Other Bulk Premises	242	87	2,311	£27
Total of all Bulk Classes	**5,604**	**3,117**	**123,027**	**£39**
Source: GLG, Valuation Office Agency(VOA)				

The rateable value of a hereditament is based on the value at which a property might be expected to be let for one year a comparison of rateable value for all bulk classes is shown in the chart below –

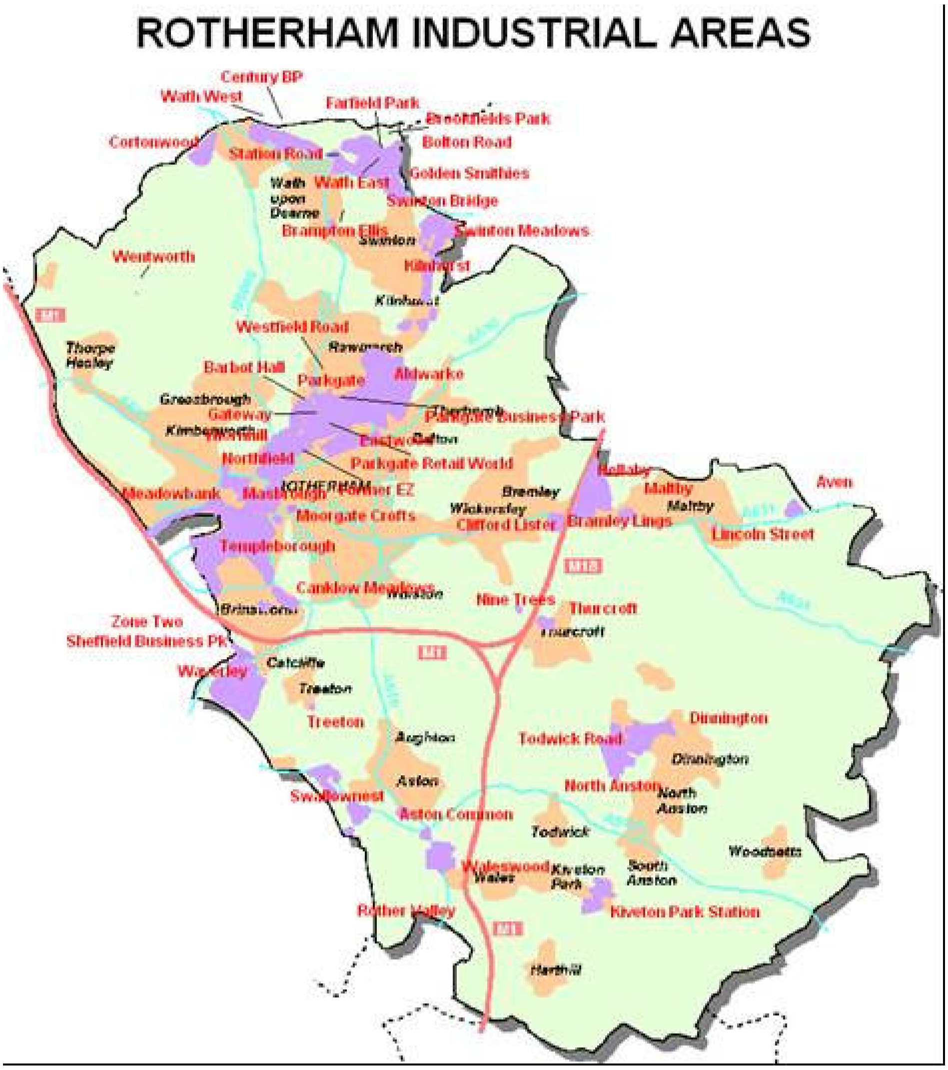


[49] *Hereditaments that do not fall into one of the five bulk classes are collectively known as the 'non-bulks'. The non-bulk category includes premises rated using other criteria (for example, turnover, in the case of public houses, the most prevalent non-bulk hereditament type), or those that are not conventional premises, such as ATMs (cash points), boating lakes and advertising rights.*

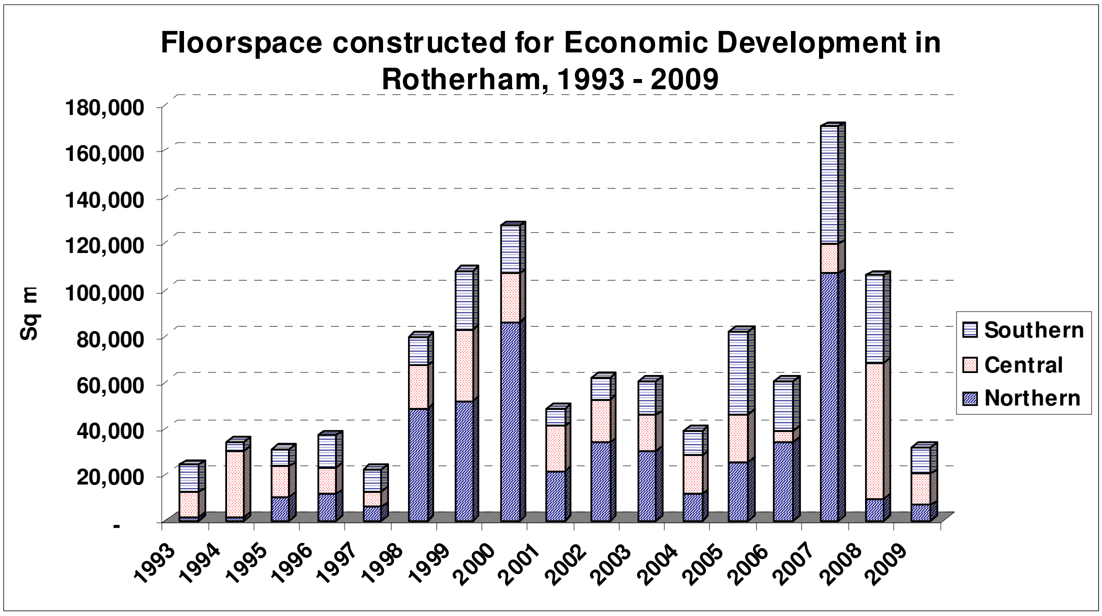
Although various factors affect this value, including location and age, a major determinant of rental value is floorspace area. Cities will also tend to have higher rateable values, as highlighted by Sheffield having by far the highest average in South Yorkshire. Values for each bulk class in table below –

Comparison of Rateable Values (£ per m2)						
	Retail	Offices	Factories	Warehouses	Other Bulk Premises	Total
Barnsley	£88	£62	£25	£27	£26	£39
Doncaster	£96	£63	£24	£35	£26	£44
Rotherham	£102	£59	£25	£30	£27	£39
Sheffield	£153	£89	£20	£32	£29	£57
Yorkshire and Humber	£113	£80	£23	£30	£26	£46
England	£130	£121	£29	£40	£32	£66
Source: GLG, Valuation Office Agency(VOA), 2008						

A local survey on the main employment sites in Rotherham is carried out annually to provide more detailed information on industrial land and floorspace including new construction, land uptake, availability and vacancy rates. The main industrial estates / business parks covered are highlighted on map below -



The net total floor-space on Rotherham's employment sites had reached over 2.84 million square metres[50] by the end of 2009. Between 1999 and 2009 there has been an increase of 643,000 sq. m. – i.e. 22.68% of the total floorspace has been constructed within the last 10 years. The breakdown is shown in the chart below, with 1999/2000 seeing very large floorspace constructed, mainly due to developments in the north of the borough, particularly in the Manvers area of the Dearne Valley. The very high floorspace construction seen in 2007 was mainly a result of the large distribution warehouses built for Next. The impact of the recession can be seen in 2009 with a much reduced rate of new floorspace construction.



Source: RMBC

Floorspace vacancy rates have tended to fluctuate between around 8% to13% - some of the higher figures often due to 'spec' built units.

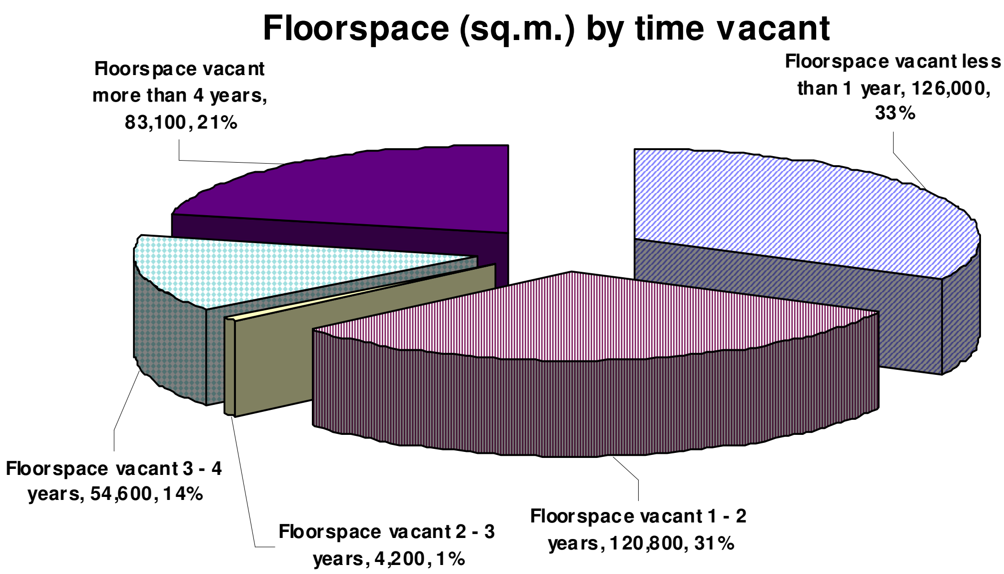
Year	Total Floorspace (Sq m)	Floorspace Vacant (Sq m)	Floorspace Occupied (Sq m)	Vacancy Rate (%)
1999	2,196,321	185,438	2,010,883	8.4
2000	2,320,851	300,897	2,019,954	13.0
2001	2,359,256	267,519	2,091,737	11.3
2002	2,399,785	235,121	2,163,707	9.8
2003	2,449,774	254,017	2,195,757	10.4
2004	2,483,462	247,307	2,236,155	10.0
2005	2,563,176	307,075	2,256,101	12.0
2006	2,598,762	348,452	2,250,310	13.4
2007	2,747,407	283,960	2,463,447	10.3
2008	2,822,897	313,340	2,509,577	11.1
2009	2,838,987	388,734	2,450,253	13.7
Change 99-09	642,666	203,296	439,370	5.3

Source: RMBC

[50] *Net floorspace accounts for floorspace constructed less floorspace demolished.*

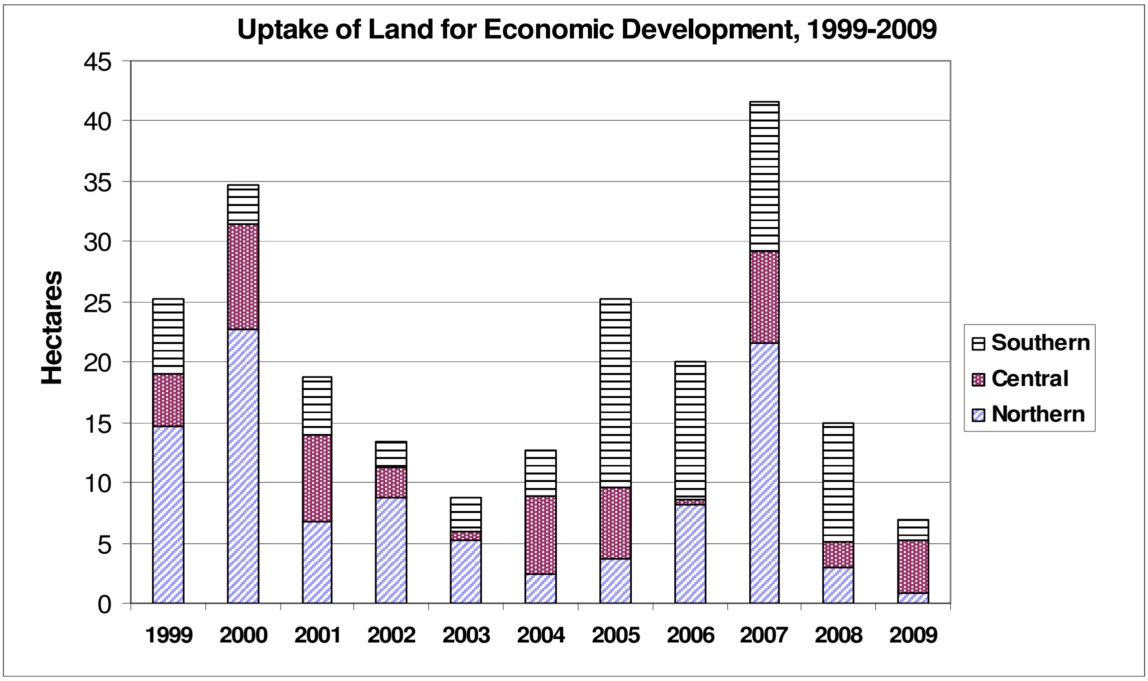
The latest vacancy rate has increased sharply due to the downturn in the local economy caused by the UK recession following closure / contraction of some companies within the borough. Some level of vacancy is healthy to allow for natural ‘churn’ in the market and to allow for a good selection of properties readily available to let / for inward investment.

As may be expected given the current market, floorspace under construction at the end of 2009 is lower than the end of 2008 with some representing the completion of applications from pre-recession. New units constructed have seen an influx of tenants from older units or from recently constructed units where terms may not be so generous. At the end of 2009 36% of vacant floorspace had been vacant for more than 2 years and 21% had been vacant for more than 4 years (although this represents just 2.9% of the total floorspace).



Source: RMBC

In 2009 there was 6.96 hectares of land taken up for economic development (64% in the Central area), lower than for many years and well below the long-term average. The average annual rate of land developed for economic purposes over the past five years is 21.8 hectares. A further 10.0 hectares was under development at the end of 2009.



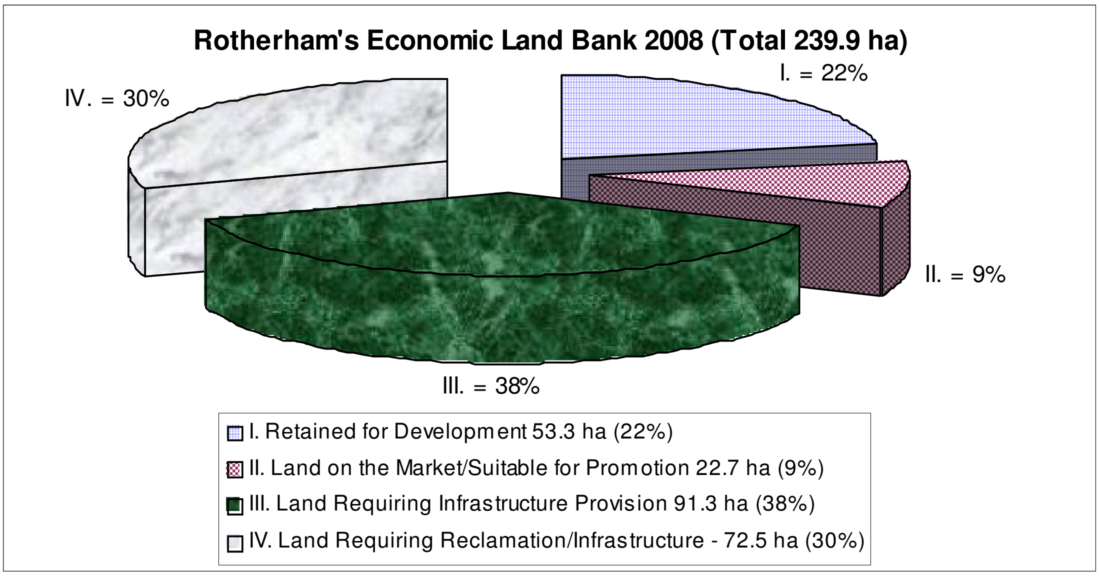
Source: RMBC

In 2009 there were 232.6 hectares of available undeveloped land in Rotherham identified for industrial or mixed use. Of this total, only 130.8 hectares (56%) could be promoted in the short term:

- 22.7 hectares (10%) of this economic land bank was immediately available for economic purposes
- 108.1 hectares (46%) required infrastructure development,

55.8 hectares (24%) required reclamation and infrastructure development before it could be utilised for economic purposes – most of this being in private ownership.

45.9 hectares (20%) were committed to or retained by industry for future development.



The progress made in 2009 compared to 2008 is shown in the following table. The amount of land requiring reclamation fell by 16.7ha, which was due to further land at Waverley being reclaimed.

Category	2008		2009	
	ha	%	ha	%
Category I (Retained for Development)	53.3	22	45.9	20
Category II (Land on the Market/Suitable for Promotion)	22.7	9	22.7	10
Category III (Land Requiring Infrastructure Provision)	91.3	36	108.1	46
Category IV (Land Requiring Reclamation/Infrastructure)	72.5	32	55.8	24
Total (ha / %)	239.9	100	232.6	100

Source: RMBC

As a comparison, in 2003 there were 176.5 hectares of land that required reclamation in the borough.

A recent report[51] by national commercial property consultancy, Lambert Smith Hampton (LSH), showed that South Yorkshire still has an oversupply of large distribution units with the majority of supply located around the M1 and M18 corridors. The oversupply is attributable to the scale of speculative development which has taken place in previous years. The well-located estates in Rotherham performed well throughout 2009, with the sub 50,000 sq ft units driving this market forward. Occupiers are drawn to the primary locations and, in particular, motorway junctions, with similar headline rental figures to the previous year being achieved. However, despite the strong activity, prime rental values fell by -13.6% in Rotherham.

Future Employment Land Requirements:

In order to assist the preparation of the Local Development Framework (LDF) the Council carried out an employment land review (ELR) in 2007. Since the completion of the ELR in May 2007 a number of things have changed, not least the economic downturn which began to impact on Rotherham in mid-2008. A revised ELR was begun in 2009 and emerging conclusions from this give guidance to the amount of employment land needed to be allocated in Rotherham to cover the period to 2027 and provides a schedule of sites in the most appropriate locations in terms of size and types.

Draft conclusions from the 2009 ELR update include:

- An identified need for around 250 hectares of land to be required to meet future employment needs to 2027.
- It is envisaged that around an additional 5 hectares of land for office floorspace will be required to 2027. Opportunities at present are limited in many of the borough's centres however these, and in particular Rotherham town centre, should be the prime focus for new office development in the future.
- The maintenance of a portfolio of at least a 5 year supply of market ready employment sites to be maintained.

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[51] *National Industrial & Distribution Report 2010*

It should be noted that future requirements will be finalised and taken forward through the LDF and will be subject to further revision in the future. The draft Core Strategy of the LDF aims to support Rotherham's economic performance and transformation by:

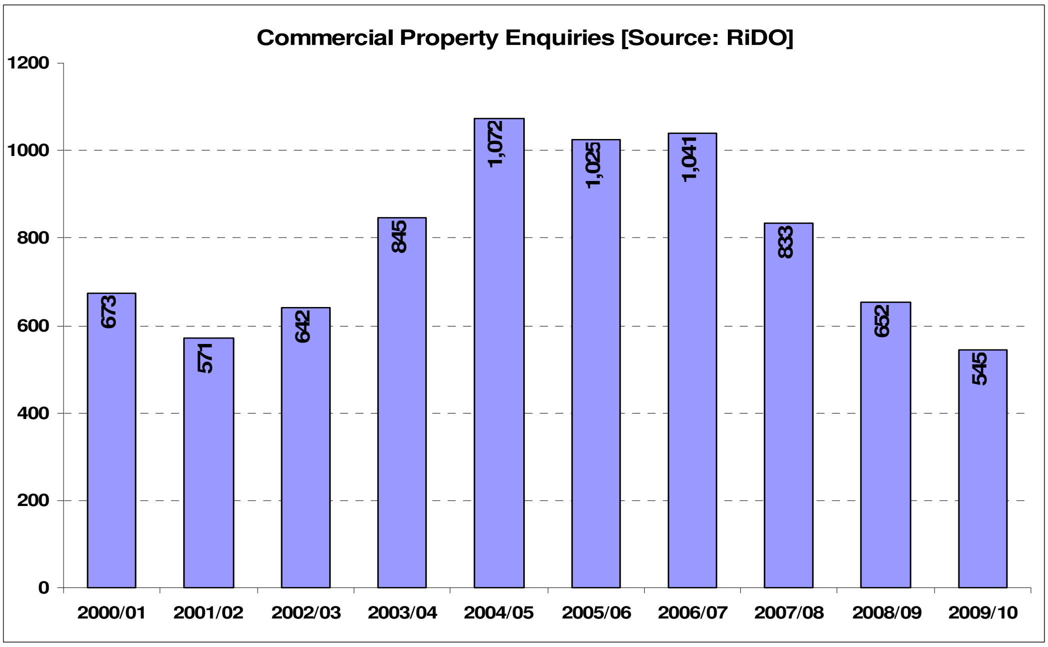
- Ensuring that a range of sites and premises are made available for economic development, through the protection of existing employment sites and the allocation of new sites to meet modern economic requirements.
- Identifying sites in general and strategic employment areas which are well served by a range of means of transport and are accessible to Rotherham's communities, in particular those within areas of highest deprivation
- Ensuring that sites which are accessible by rail or waterways are retained for economic development and utilised by end users wherever possible
- Targeting the following priority sectors:
    1. Creative and Digital Industries
    2. Advanced Manufacturing and Materials
    3. Environmental and Energy Technologies
    4. Construction Industries
    5. Business, Professional and Financial Services; and
    6. Food and Drink
- Encouraging developments which support small and start-up businesses, business incubation schemes, and low carbon industries and developments, particularly those which support the Dearne Valley Eco-vision
- Promoting access to education and training to improve the skills of all sections of the community necessary for Rotherham's future economic prosperity

The location of strategic employment sites is subject to further consultation but likely allocations include the following key areas:

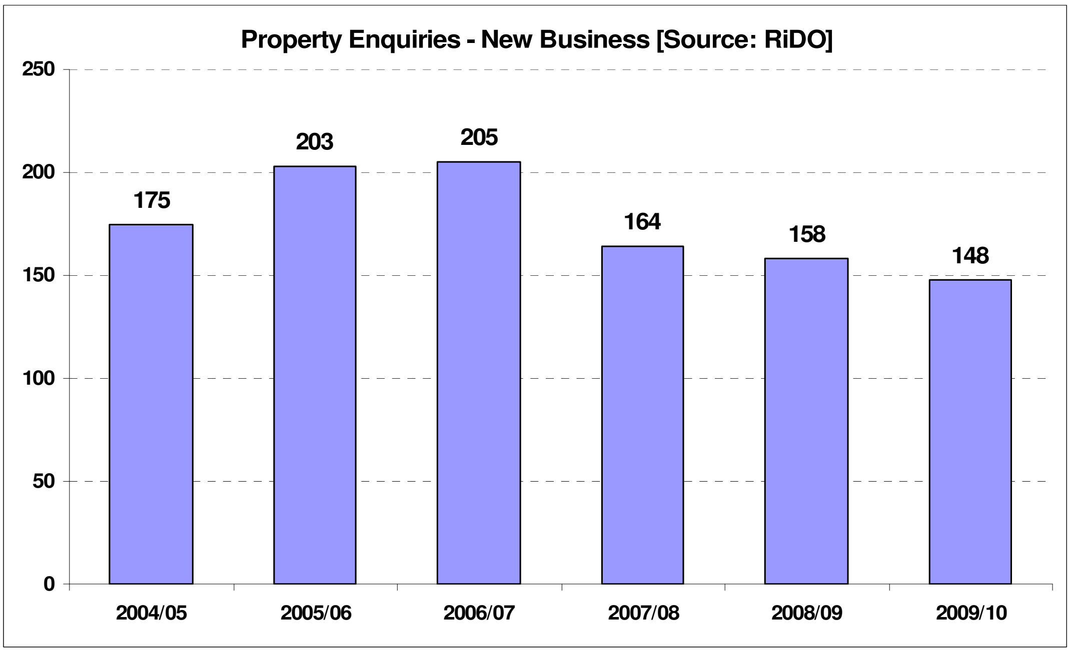
- Rotherham urban area (along the Templeborough corridor between Rotherham town centre and Meadowhall)
- Wath (Manvers)
- Dinnington
- Maltby / Hellaby / Bramley; and
- Waverley (including the Advanced Manufacturing Park)

Commercial Property Enquiries / Inward Investment:

Rotherham Investment & Development Office (RiDO) is the regeneration arm of Rotherham Metropolitan Borough Council and provides a free commercial property search service to individuals and businesses looking for property within the Rotherham borough. From 2001/02 to 2004/05 enquiries had grown steadily year on year, until they reached a peak of just over 1000 enquiries annually from 2004/05 to 2006/07. However, due to the crisis in the financial markets and the subsequent recession, enquiries then started to fall each year since 2006/07. The rate of the drop in enquiries is starting to ease and although we expect there to be below 600 enquiries during 2010/11, we remain hopeful that the markets will pickup afterwards.

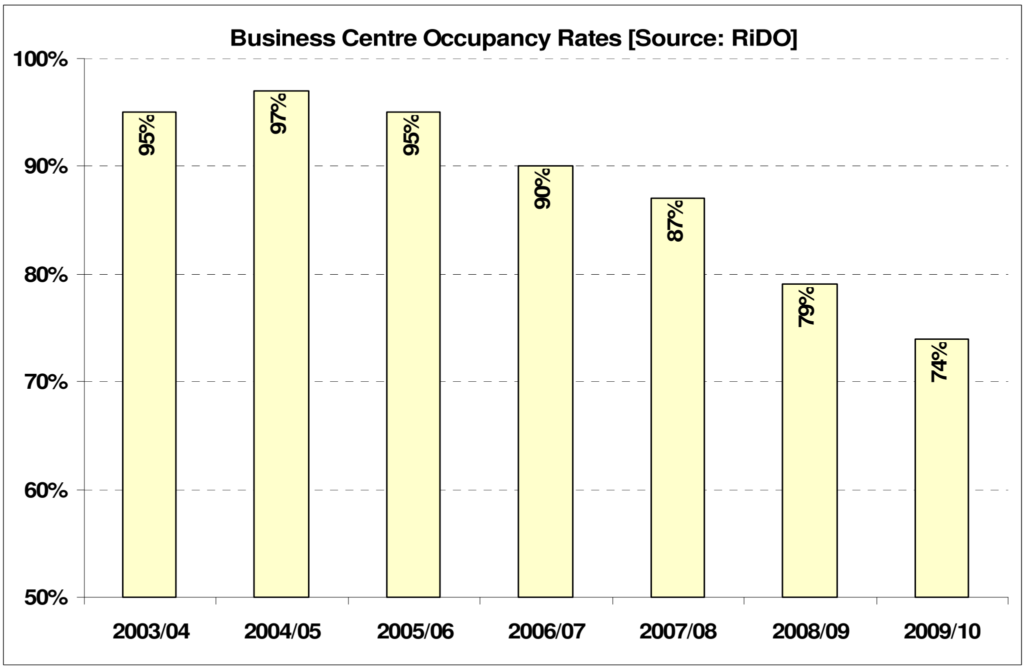


Property enquiries for new start businesses have been falling in line with general property enquiries since 2006/07, however, the rate of decline has not been as marked. This is because many people who have been facing redundancy or struggling to enter the job market have decided to start a business themselves, a further breakdown of our enquiries shows that most demand for office and industrial units is at the smaller end of the market - which is typically properties sought after by start-ups.

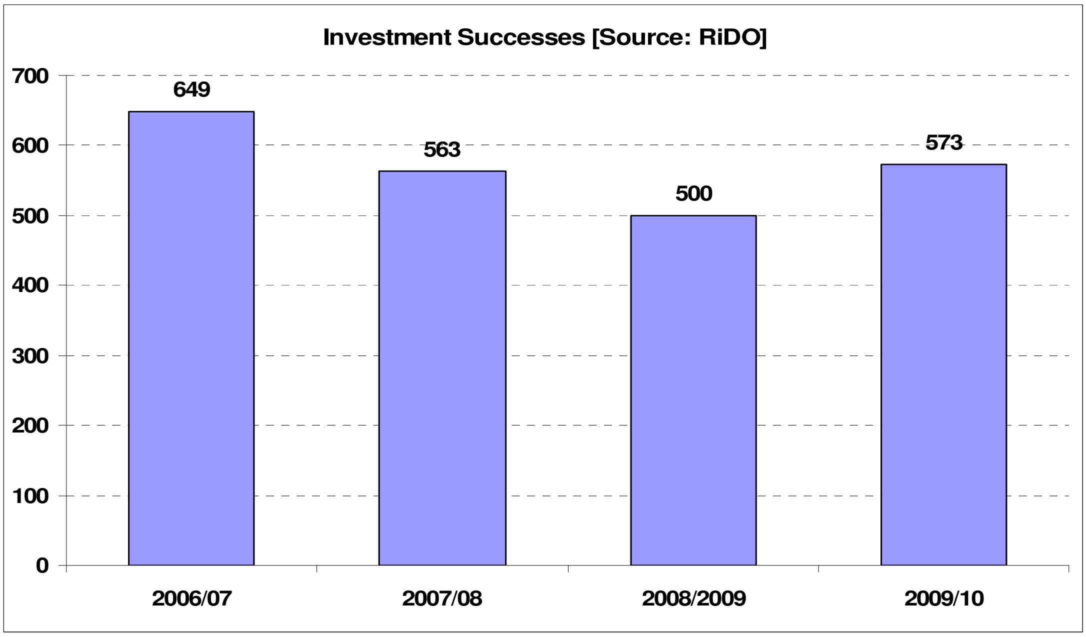


Occupancy at the RiDO managed business centres (Century, Moorgate, Fusion@Magna but excluding Matrix@Dinnington which has only recently opened) has been gradually falling since 2004/05. The centres operate easy in / easy out lease terms, but are restricted to start-up businesses, many of whom started at home. Due to the financial climate many of the tenants have been looking to save on costs, and for many, the simplest option was for them to terminate their lease and move back home. Another factor is that one of the centres, Moorgate Crofts, had a specific target group of financial/service sector companies, this sector was especially hard hit in the recent recession.

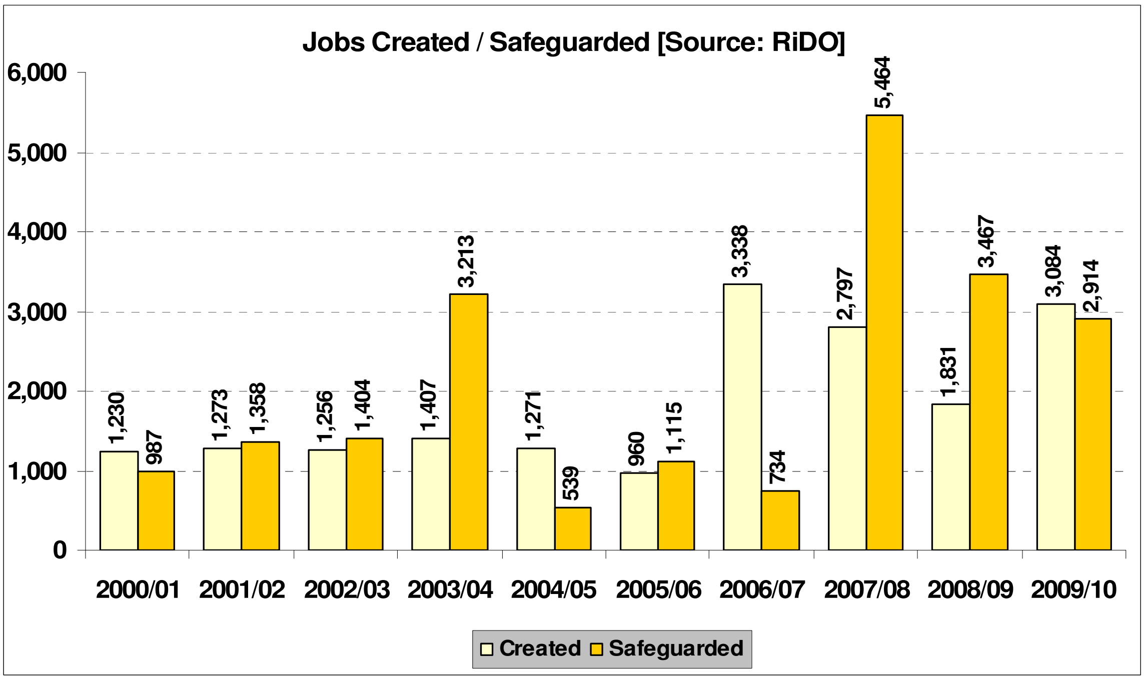
A point worth mentioning is that the target occupancy for the centres is just 85%, not 100%, this is because they are “incubation centres”, ideally a business should grow and move out, so there needs to always be room for new businesses to move in and start the growth process.



Investment successes are defined as any business occupying a property within Rotherham, this could be due to a new business starting up or an existing business expanding or relocating. Due to the financial climate we have understandably seen a fall in investment successes since 06/07, however, we saw a significant rise in 09/10 of 15%. This could be due to a number of factors, but is mostly likely due to businesses looking to relocate, either to downsize or to take advantage of the lower property values / rentals.

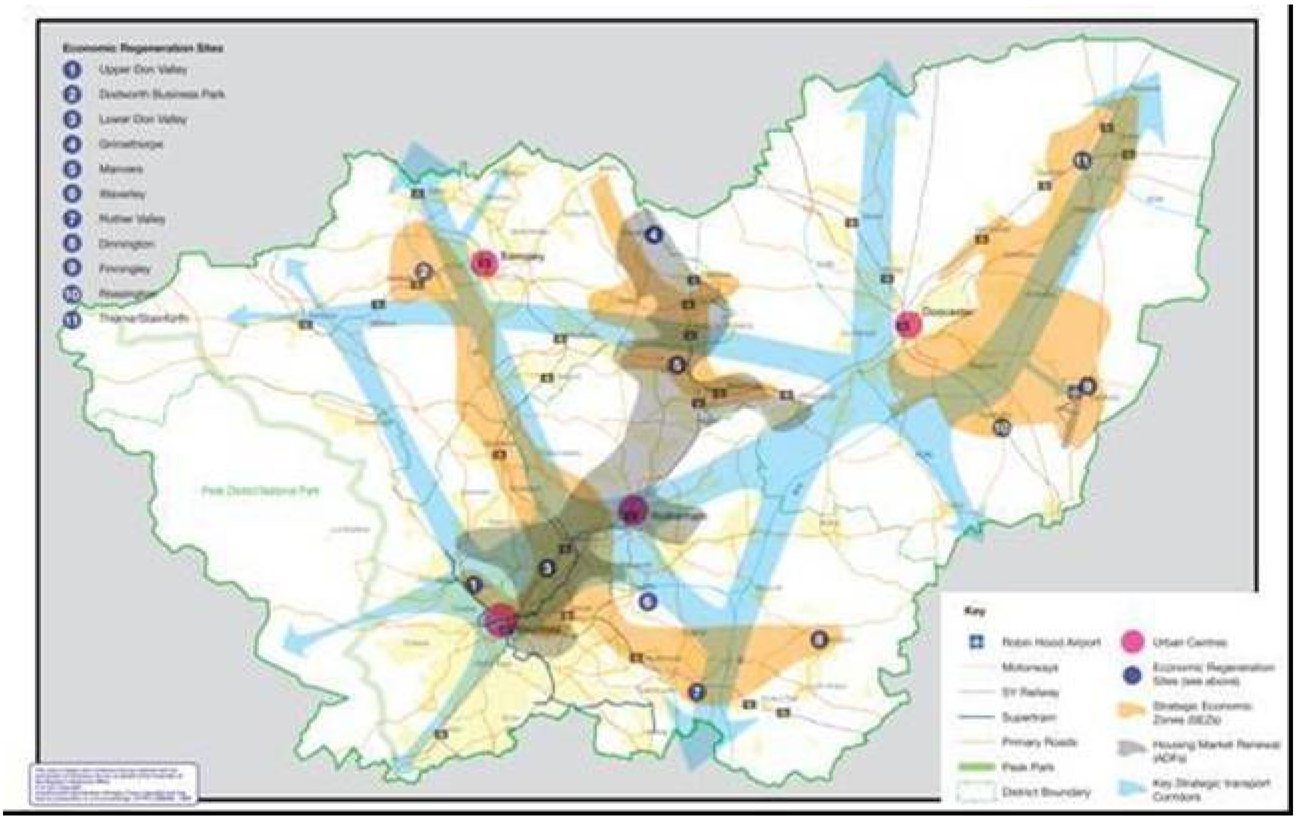


RiDO track the number of companies locating / expanding in the borough and calculate the number of jobs that have been created or safeguarded. The number of jobs created in the borough has been falling from 2006/07 to 2008/09, but then saw a surprising increase of 68% for 2009/10. It is important to note that these jobs are counted when the jobs are announced and not created and there were a number of significant announcements during 09/10. These include the 300 jobs to be created at the Nuclear AMRC, 90 jobs at a new Pegler factory in Manvers and significant investments from Metalysis, Sandvick & Cash4Gold.



Transport:

Poor transport links will act as a barrier to long term sustainable economic growth and strong evidence that Rotherham and Sheffield share a single economy means it is essential that good transport links exist between the two. Transport strategy and planning is covered by the South Yorkshire Local Transport Plan (SYLTP), a jointly developed plan by the four South Yorkshire authorities and the Passenger Transport Executive. Key strategic transport corridors and future growth areas are shown on the map below.



Of particular relevance to Rotherham are the identified key economic regeneration sites at Manvers, Waverley, Dinnington, and Rother Valley in the borough, but also the Lower Don Valley area just over the border in Sheffield.

The current rail link, particularly to Sheffield, with low capacity and irregular services, needs improvement, while road transport suffers from congestion around the M1 junctions and on the main approaches into the town and through Parkgate. Traffic flow between Rotherham and Sheffield is slowed at either end of Tinsley viaduct (particularly at the south) by roundabouts; consideration should therefore be given to improving traffic flow in this area as the two economies are so integrally linked. Potential medium to long term solutions include extending Supertram or provision of a Bus Rapid Transport (BRT) system, with a park-and-ride scheme. A new link road at Waverley and the A57 M1 Junction 31-Todwick Crossroads scheme, improving access to Dinnington, are shorter-term interventions.
Equally important are transport links to other major cities (such as Leeds, Manchester and London), as potential markets for local businesses, as well

as providing a pool of skilled labour and higher-paid jobs for Rotherham residents. Rotherham, unlike Sheffield and Doncaster, is disadvantaged by not having any direct rail service to London. Rotherham is accessible to three international airports, Robin Hood (19 miles), Manchester (49 miles) and East Midlands (50 miles). Manchester is by far the largest of these airports, with the widest range of destinations, and trans-Pennine links need improvement, particularly by rail.

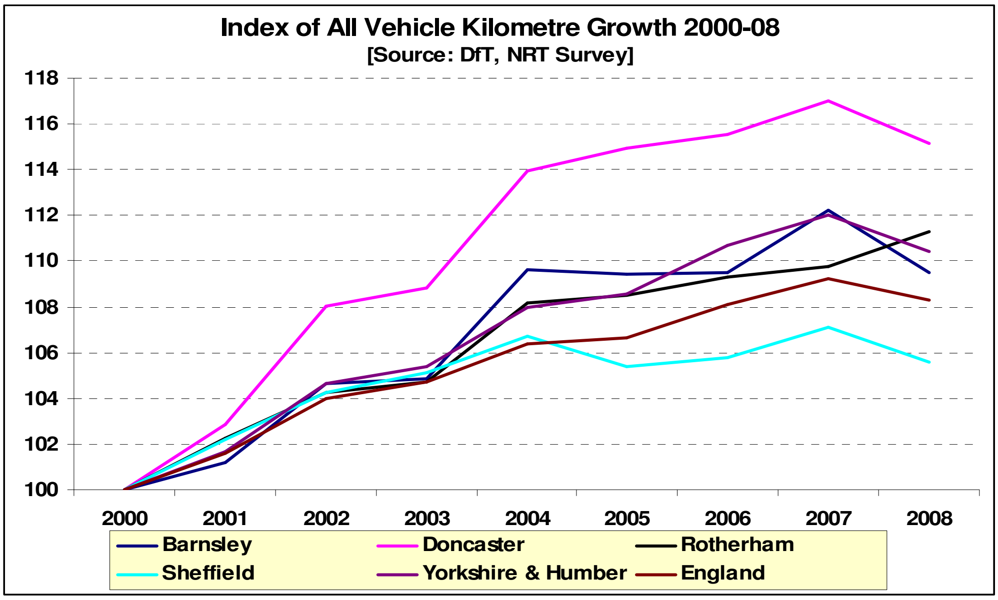
Evidence suggests that expanding and successful economies tend to generate an increase in commuting and freight transportation, with associated congestion problems. The increase in traffic volumes / distance travelled is clearly illustrated in the table below, with all areas in South Yorkshire seeing significant increases up to 2007.

Million vehicle kilometres - All Vehicles 2000-2008

	2000	2005	2006	2007	2008
Barnsley	1,742	1,906	1,907	1,955	1,907
Doncaster	2,666	3,065	3,081	3,119	3,069
Rotherham	2,147	2,329	2,347	2,356	2,389
Sheffield	2,571	2,710	2,719	2,754	2,715
Yorkshire & Humber	38,502	41,794	42,612	43,128	42,525
England	402,890	429,705	435,658	440,156	436,325

Source: DfT, National Road Traffic Survey

Road traffic nationally fell in 2008 for the first time since monitoring of this dataset began in 1993 – factors are likely to have been the large increases in fuel prices and the impact of the recession. Interestingly traffic volumes in Rotherham continued to rise by 1.4%. Over the full period since 2000 Doncaster showed the largest percentage increase in overall traffic volumes (15.1%) but Rotherham was also above the regional and national rates of increase at 11.3%.



Possible solutions to ever increasing traffic volumes include moving people from their cars to public transport and transfer of road freight onto rail.

However, transport links within the borough must provide the opportunity for all residents to access the employment and training opportunities which will be created; this is of particular importance to those people from the more deprived areas who are often reliant on public transport. Any improvements to the transport infrastructure are challenging due to the high costs involve, particularly in the current economic climate, and are largely dependent on support and funding from Central Government.

Land, Buildings & Infrastructure: Key Issues

Housing market
- Despite a fall in population between 1981 and 2001 of around 5,000 people, the number of households in this period increased by over 13,000 (large increase in one-person households)
- Prediction for 129,000 households in Rotherham by 2026 (20% increase, but this is likely to be revised downwards in 2008-based projections)
- Housing remains relatively more affordable at 77% of national average price (90% of regional) but house price to earnings ratio has increased substantially, particularly in the more desirable parts of the borough
- Higher levels of social rented housing (26.4%) than nationally (19.2%)

Future housing requirements
- Net housing completions currently below the level required to meet the targets given to Rotherham within the Regional Spatial Strategy
- Current economic downturn impacted severely on the house building / construction sector
- Affordable housing completions were high in Rotherham in 2008/09 but the amount of affordable housing provided in future years is primarily linked to an improvement in the overall market

Commercial and industrial land / floorspace
- Rateable values in Rotherham comparatively low across all classes
- 2.84 million sq m of floorspace on the main industrial estates with over 22% constructed within the last 10 years
- Vacancy rates rising in current recession with some older units in less desirable locations being long-term vacant.

Future employment land requirements
- Identified need for around 250 hectares of employment land to 2027
- Additional 5 hectares of office space required – Rotherham town centre should be the prime focus
- Need to keep a 5 year supply of market ready employment sites, offering a range of size and type in attractive locations

Commercial property enquiries / inward investment
- Overall property enquiries have fallen over last few years but decline less for new-start businesses
- 2009/10 shows an encouraging increase in number of jobs 'created'

Transport
- Need for improved transport links, road and public transport, particularly to the Rotherham-Sheffield corridor
- Congestion at peak times on some routes in/out of Rotherham
- Bus Rapid Transport scheme currently being planned to connect Sheffield and Rotherham centres, incorporating new Waverley development

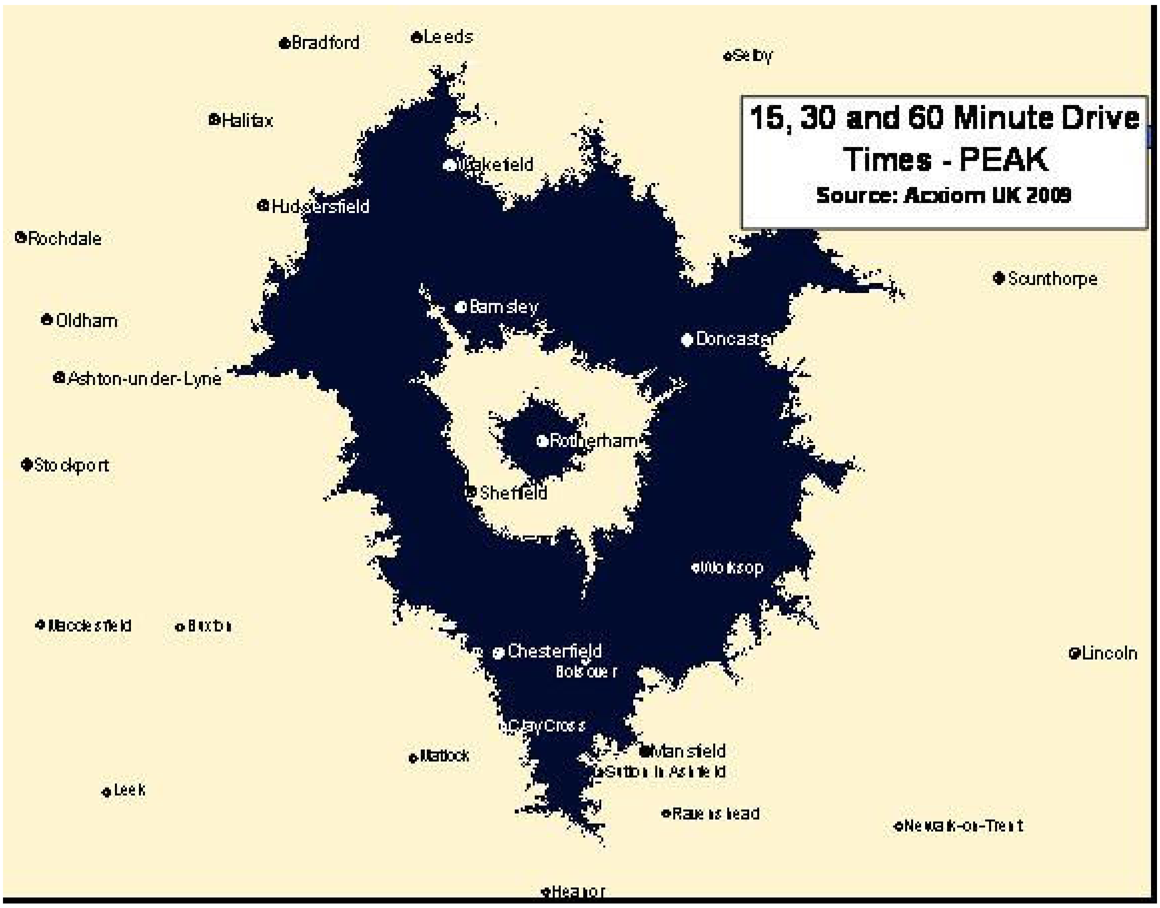
ENVIRONMENT

It is becoming increasingly important to consider the impact of local economic development on the environment and how the local economy will be affected by a transition to a low-carbon economy. Whilst it is important that Rotherham invests its efforts in those sectors of the economy that illustrate growth and where it has a competitive advantage, the environmental implications must be considered throughout. Some of the key challenges will be –

- Decoupling the link between economic growth and the environmental harm it can cause;
- Focusing on environmental and technology sectors;
- Improving local supply chains, the use of local services and employing local people;
- New developments using sustainable and/or recycled construction materials and improving their energy efficiency;
- Reducing levels of CO_2 produced by travel and transportation.

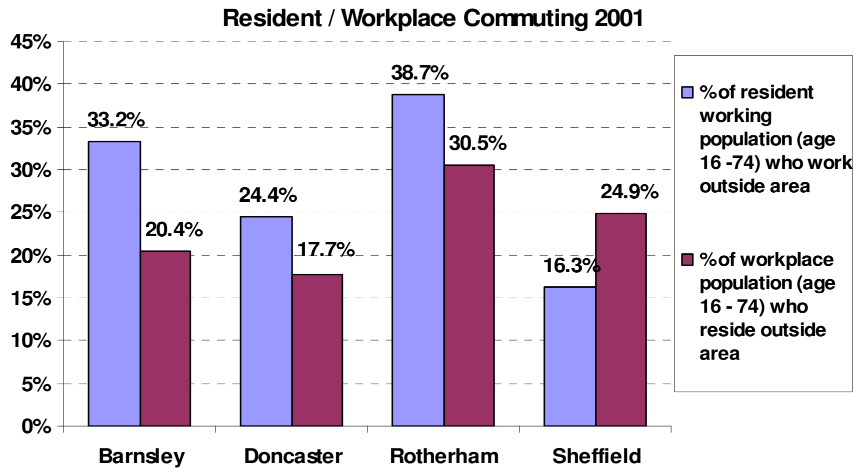
Commuting / travel to work:

Rotherham's economic relationships and the strong links that exist with Sheffield, including commuting between the two centres, were briefly discussed in the economic relationships section of the introduction.

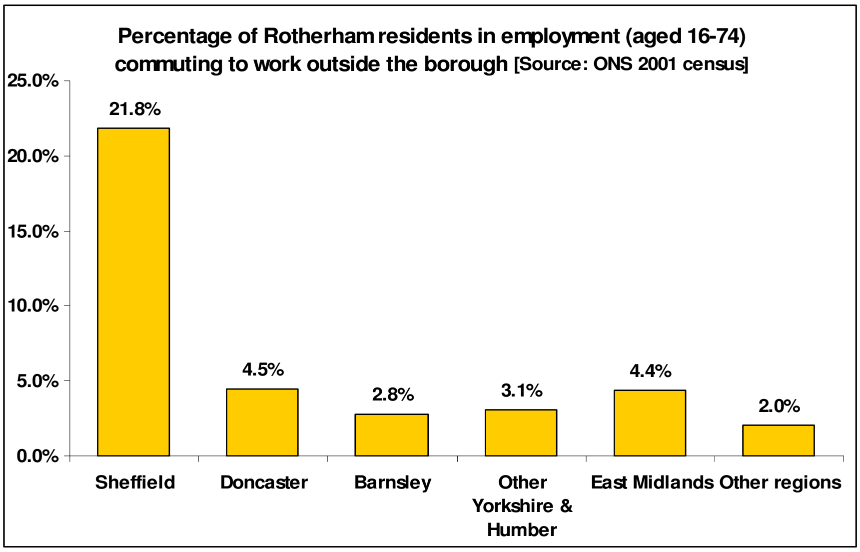


From the centre of Rotherham a peak hour journey of 60 minutes will take you beyond Wakefield (almost to Leeds) in the north and to Chesterfield / Mansfield in the south; Sheffield will take somewhere in the region of 30 minutes. Obviously these times will vary greatly by location within the borough; many residents in the south of the borough would find relatively easy commutes to places such as Chesterfield and Worksop, whilst those in the north or east of the borough may find commuting to Doncaster or Barnsley easier than coming into central Rotherham.

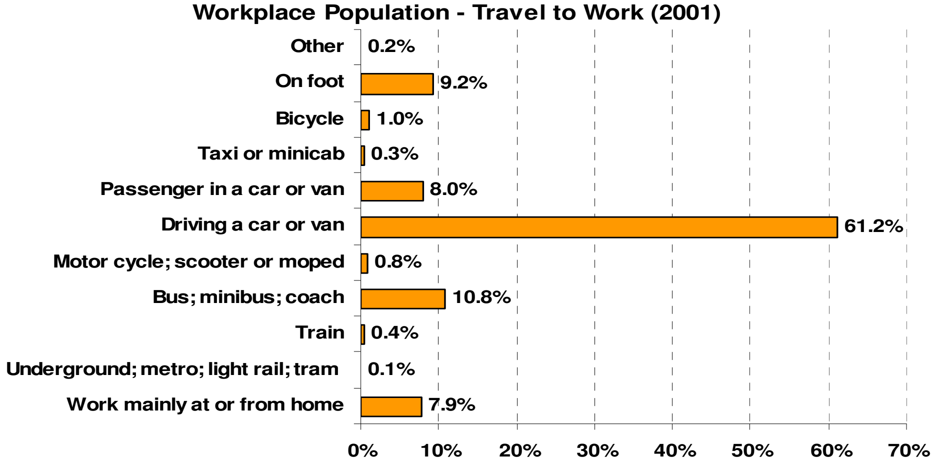
Commuting data from the Census is now dated but remains the best comprehensive source of travel to work flows available – these highlight Rotherham's central location within the sub-region with significantly higher percentage of resident and workplace population cross border flows than the other districts in South Yorkshire. Almost 39% of Rotherham's resident working population travel outside the borough for work and over 30% of the workplace population in Rotherham have travelled into the borough.

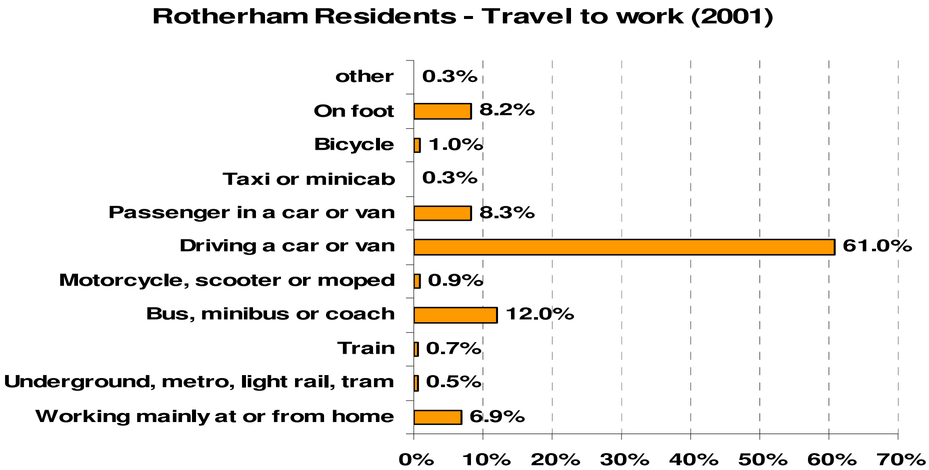


Given the proximity, and the fact that it is a city economy, it is unsurprising that Sheffield is by far the most popular destination for Rotherham residents -

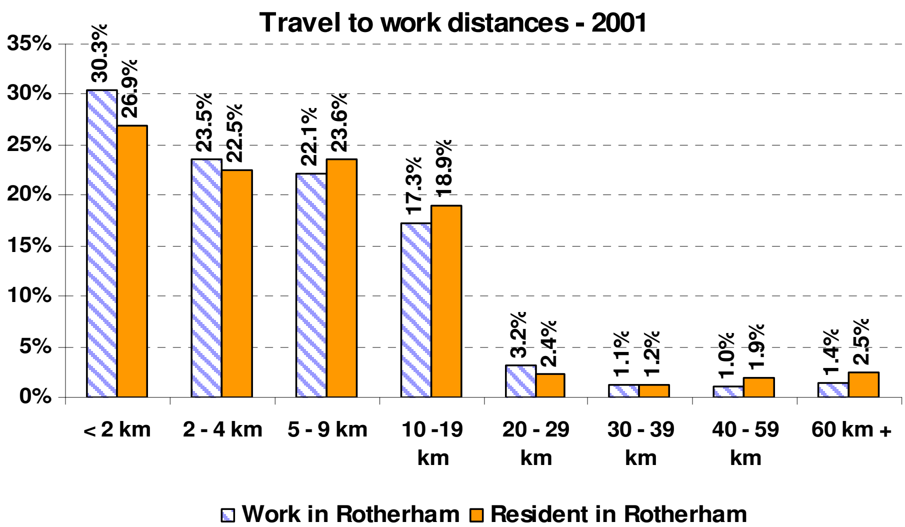


The mode of transport for both residents travelling to their workplace and for the workplace population of Rotherham shows a similar breakdown, with relatively low public transport usage and a high car usage.



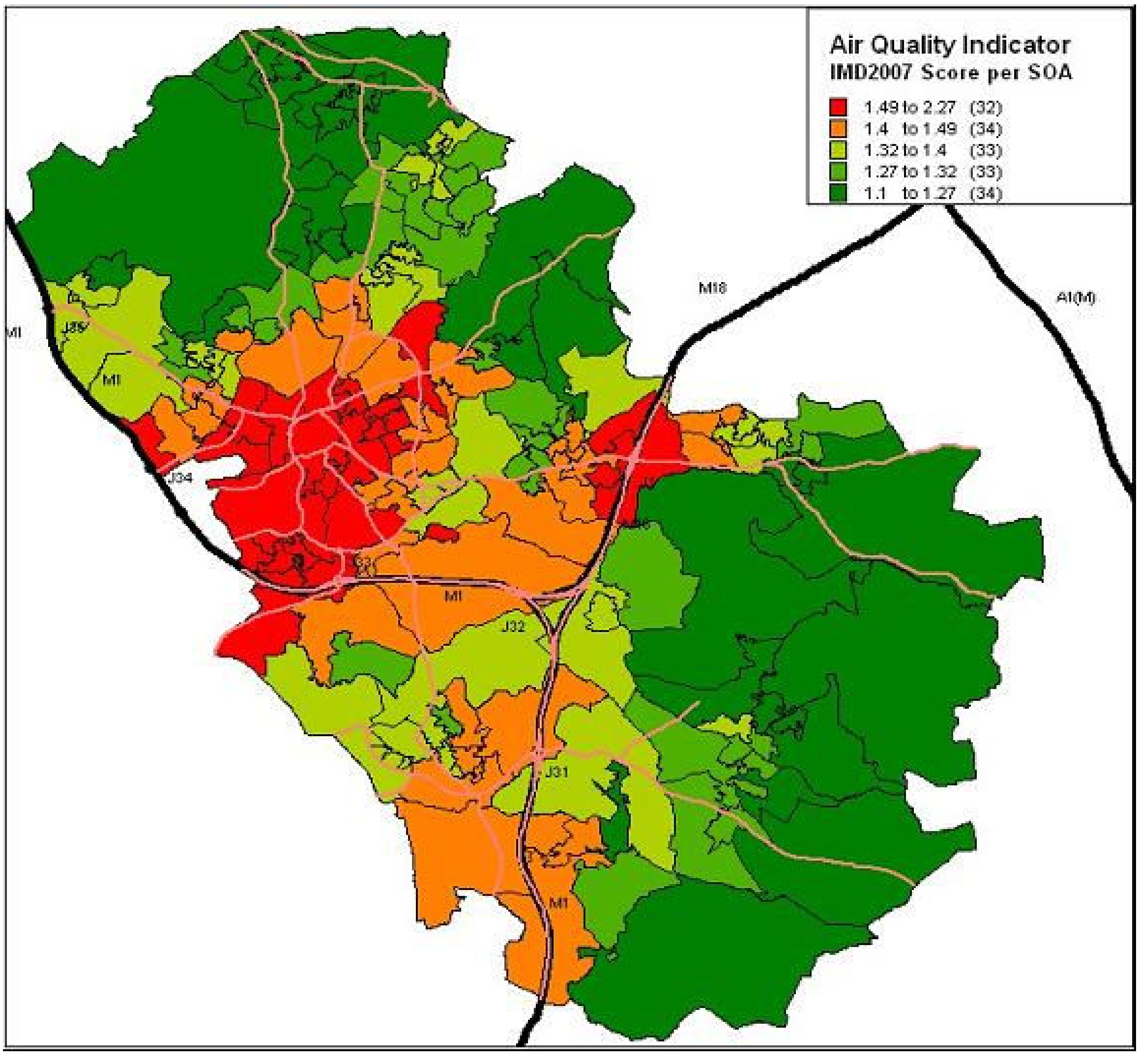


Analysis by the distance people travel to work indicates that on average people who work in Rotherham have shorter commutes than people who are commuting from Rotherham to work.



Air Quality:

The high level of commuting in/out of Rotherham has obvious implications for levels of congestion and the air quality in communities within the borough, particularly around the main arterial roads. As part of the Index of Deprivation 2007 Living Environment domain a combined measure of air quality[52] is included and a score is available for each Lower Super Output Area (LSOA). The map below clearly indicates that areas with the poorest air quality (i.e. with the highest score) are within the town centre, the industrial corridor running towards Sheffield and close to the M1 and M18 motorways. It is also noticeable that 'hotspots' are often close to motorway junctions – e.g. junction 1 of the M18 at Hellaby.



[52] *Overall air quality score represents the addition of four individual indices (Nitrogen Dioxide, Particulates, Sulphur Dioxide and Benzene). A higher value implies poorer overall air quality.*

Energy Consumption / CO2 Emissions:

Scientific evidence for climate change caused by human activities continues to grow along with the necessity to ensure that measures are taken to mitigate the impact of economic growth in the future. Just some of the possible consequences to come out of the latest UK Climate Projections 09 (UKCP09) for the Yorkshire & Humber region and for Rotherham –

- Drier summers? Mean precipitation level in the summer period throughout the region is generally predicted to decrease by as much as 20% or even 30% at the most extreme of the wider probability levels. For Rotherham this storyline is very similar.
- Wetter winters? In the winter period, the regional precipitation levels are predicted to increase. The upper predicted change for the region, (at a 67% level), sees a 10% rise. For Rotherham this figure may be as much as 16.5% (at the 67% level). Rotherham therefore may experience wetter winters than the regional mean.
- Annual temperature rise? Rotherham's annual temperature is predicted to be the highest in the region. Rotherham's temperature range between 33% and 67% for the 2050's is modelled at approximately a 2-2.7℃ increase.

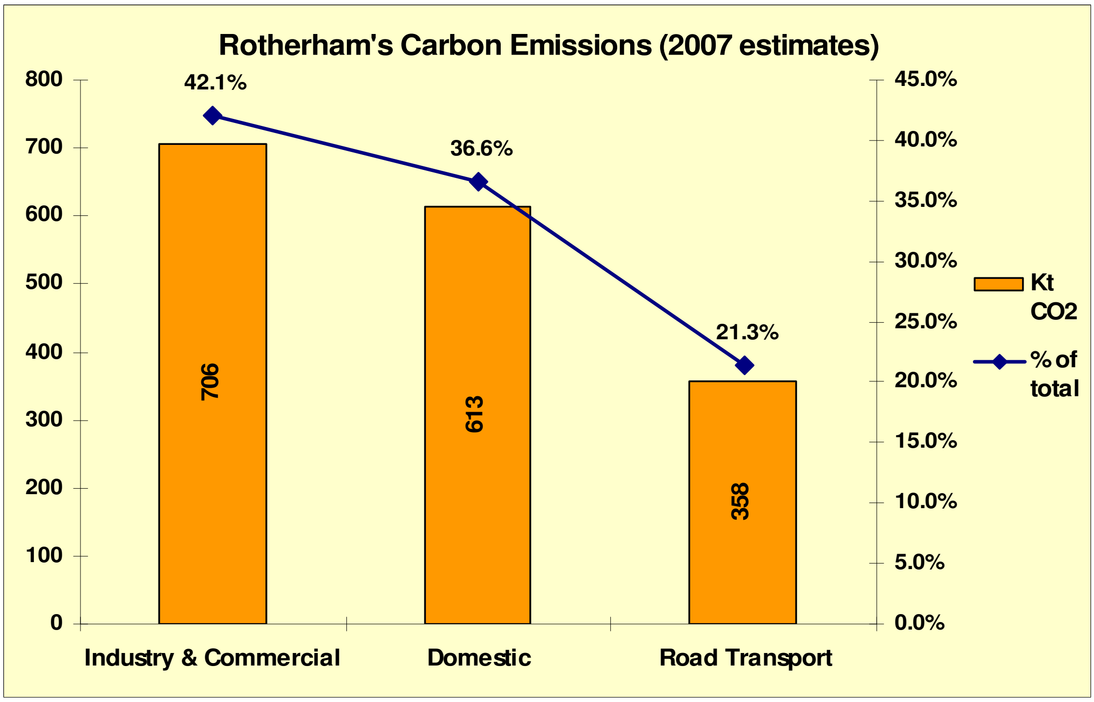
Rotherham's CO2 emissions by sector and fuel for the last two years is shown in the table below -

Emissions [kt CO2] by Sector / Fuel (2006 to 2007)			
	2006	**2007**	**Change:**
Industry and Commercial Electricity	430	398	-32
Industry and Commercial Gas	193	168	-25
Industry and Commercial Oil	46	46	1
Industry and Commercial Solid fuel	5	4	0
Industry and Commercial Process gases	26	28	2
Industry and Commercial Wastes and biofuels	1	1	0
Industry and Commercial Non fuel	2	2	0
Industry Offroad	54	55	0
Agriculture Oil	3	3	0
Total Industry & Commercial	**760**	**706**	**-54**
Domestic Electricity	230	223	-7
Domestic Gas	351	331	-20
Domestic Oil	7	6	-1
Domestic Solid fuel	48	46	-2
Domestic House and Garden Oil	2	2	0
Domestic Products	7	7	0
Total Domestic	**644**	**613**	**-31**
A-Roads Petrol	89	86	-3
A-Roads Diesel	80	84	4
Minor Petrol	104	103	0
Minor Diesel	79	83	4
Road Transport Other	3	2	0
Total Transport	**353**	**358**	**5**
Total Emissions	**1757**	**1677**	**13**
Total Emissions Per Capita	**6.9**	**6.6**	

Source: Defra, DECC

Due to Rotherham's retention of a strong manufacturing base the production of CO2 emissions per head had been above the UK average but falls in the last two years has seen this fall to just below average. The official data shows a large fall in emissions since 2005 for Rotherham (as per National Indicator NI186) but the Department for Energy & Climate Change (DECC) have advised use of 2006 as a proxy baseline for industrial and commercial emissions – this still sees an overall reduction for all emissions of 4.5% from 2006 to 2007.

This reduction could well be a result of diversification in the local economy and reflect a move away from the more traditional heavy industries, which usually produce high carbon emissions, to more high-tech manufacturing and service sectors. There has also been a steady fall in domestic gas related emissions but relatively little change in emissions from road transport. Latest data shows that the percentage of total CO2 emissions in Rotherham produced by industry and commerce has fallen from just over half of the total to just over 42% with domestic emissions accounting for 36.6% and emissions from transport accounting for 21.3%.



Source: Defra, DECC

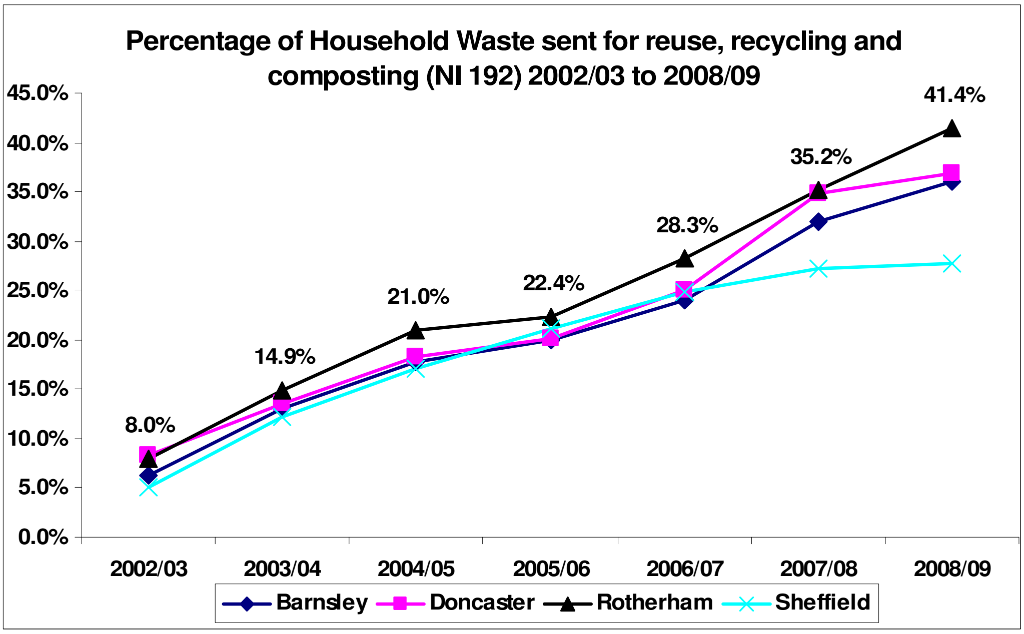
Whilst the need to cut emissions can be viewed as a problem it also presents opportunities for Rotherham as the UK moves to a low carbon economy. There is large potential in growing the number of businesses and increasing employment within the Environmental Technologies sector – e.g. waste management / treatment, renewable and low-carbon energy. One example is the recent announcement of the new £25m Nuclear Advanced Manufacturing Research Centre (Nuclear AMRC) to be built at the Advanced Manufacturing Park at Waverley and Rolls-Royce's planned civil nuclear factory, also to be built in South Yorkshire.

Waste / Recycling:

In the past an inevitable consequence of economic growth has been an increase in the amount of waste produced – in the future newer / more modern ways of working in businesses will be needed to ensure a more sustainable use of resources. Over recent years the handling of waste in Rotherham has been transformed; the percentage of municipal waste sent for land fill has fallen from almost 90% in 2002/03 to under 44% for the year 2008/09 (new National Indicator NI 193). Sheffield has by far the lowest percentage of its waste going to land fill due to the use of the incinerator in the city.

Percentage of Municipal waste sent to Land Fill							
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Barnsley	91.2%	83.4%	n/a	78.0%	74.5%	67.8%	59.7%
Doncaster	83.1%	84.6%	78.1%	72.5%	73.5%	65.4%	60.6%
Rotherham	88.8%	81.7%	75.6%	74.5%	69.4%	63.2%	43.9%
Sheffield	51.9%	43.7%	39.0%	34.9%	14.6%	16.4%	13.3%
Source: DEFRA WasteDataFlow							

Given the scarcity of suitable sites for land fill and the need to maximise use of natural resources this figure will need to reduce further which will primarily be done by greater reuse and recycling. This will also provide opportunities for new businesses within this sector in dealing with the processes in handling and recycling of this waste. The percentage[53] of household waste sent for reuse, recycling and composting (new National Indicator NI 192) is shown below. Rotherham has seen a vast improvement from just 8% being recycled in 2002/03 to 41.4% in 2008/09, the highest rate in the sub-region.



Source: DEFRA, WasteDataFlow

[53] *Estimates prior to 2007/08 have been produced by Defra's waste statistics team. They provide an indication of what LA performance would have been against the new NI if they had been in operation at the time.*

Environment: Key Issues

Commuting / travel to work

- Strongest cross-border flows in South Yorkshire, particularly to/from Sheffield.
- Almost 39% of Rotherham's resident working population travel outside the borough for work and over 30% of the workplace population in Rotherham have travelled into the borough.
- Low public transport usage and high car usage.

Air Quality

- Traffic congestion impacting on air quality in some parts of the borough, particularly close to Rotherham town centre and around M1 / M18 motorway junctions

Energy consumption / CO2 emissions

- Overall energy consumption and CO2 per head in Rotherham has been falling as the economy becomes less reliant on traditional manufacturing
- Road transport now accounts for over 21% of all CO2 emissions
- Potential for Rotherham to increase businesses / employment within the expanding Environmental Technologies sector as the UK moves towards a low-carbon economy

Waste / Recycling

- In the last 6 years the amount of municipal waste sent to land fill has reduced by over half to 44%.
- Rotherham has highest recycling rate in South Yorkshire, improving from 8% to 41.4% in six years

Rotherham Town Centre

Over the past few decades Rotherham has witnessed a steady drift of people away from the town centre, resulting in many people living, working and shopping outside of the centre. In 2006 the Council's Reachout 13 survey revealed that Rotherham residents were most likely to use Parkgate Retail World for shopping, Meadowhall / Sheffield City Centre for eating out and cinema / theatre, and local centres for pubs / clubs. The result has been the stagnation and decline of Rotherham as both an economic and social centre.

In the autumn of 2001 Yorkshire Forward launched its urban renaissance programme to help support the regeneration of major towns and cities in Yorkshire. In Rotherham a 'town team' comprised of community, business and Council interests developed the Renaissance Charter which set out a broad 25 year vision and identified 10 goals for Rotherham town centre. Following on from this was a master planning stage which led to production of the Strategic Development Framework (SDF).

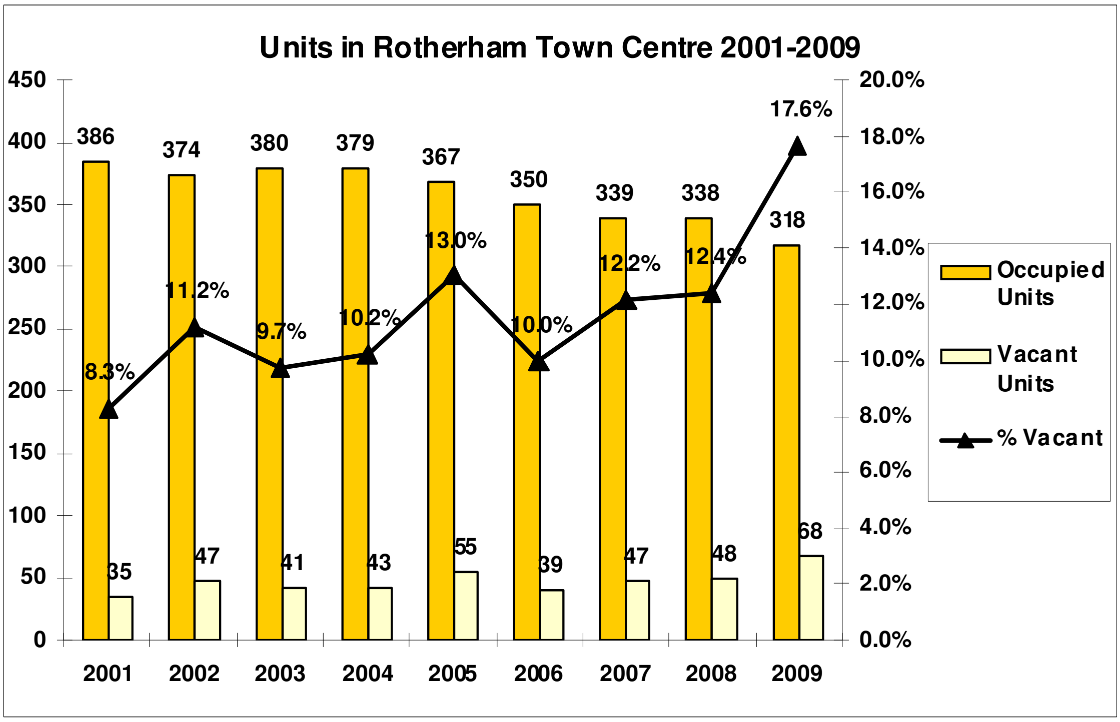
The Town Team Charter sets out ten goals that will underpin Rotherham's Renaissance. These are seen as being essential to the transformation of the town and the creation of a great place -

- Make the river and the canal a key part of the town's future
- Populate the town's centre by creating good quality living
- Place Rotherham within a sustainable landscape setting of the highest quality
- Put Rotherham at the centre of a public transport network
- Improve parts of major road infrastructure
- Make Forge Island a major new piece of the town centre
- Establish a new civic focus that not only promotes a more open and accessible type of governance but also embraces culture and the arts
- Demand the best in architecture, urban design and public spaces for Rotherham
- Improve community access to health, education and promote social well being
- Create a broadly based, dynamic local economy with a vibrant town centre as its focus

These goals can only be achieved through investment in the town centre with new housing, retail, leisure, recreation and commercial development, as well as new and improved public spaces. Significant progress has already taken place with successful completion of the Westgate Demonstrator Project, a new leisure centre at St Ann's, a new 'walk-in' PCT centre, and the refurbishment of Imperial Buildings to provide new retail units and living accommodation. There have been improvements around the High Street and the Minster through the Townscape Heritage Initiative and work has begun on Rotherham Central train station and on the new civic offices on the former Guest & Chrimes site.

Vacancy Rates

However the economic downturn has impacted on the speed of some developments, for example the All Saints Building has been demolished but development is on hold due to the current economic climate, and on the number of empty commercial properties in the town centre. The impact on the retail sector can be clearly seen in 2009 on Rotherham town centre, with an additional 20 units vacant compared to the previous year, the vacancy rate increasing to 17.6%.



Source: RMBC

At the end of 2009 there were a total of 386 units in the town centre (excluding the new Imperial Building units which at the time of the survey were not available to let) with approximately 63,743 sq m of floorspace. Of these 68 units were vacant - this equates to 11,985 sq m of vacant floorspace, or 17.6% of total units (and 18.8% of total floorspace). There are 146 units on defined prime shopping streets, totalling over 31,000 sq m of floorspace. The majority of these are retail units (i.e. A1-A5 uses) however 26 units accounting for 5,567 sq m are vacant.

Rotherham Town Centre Retail & Leisure Study

In January 2009 Colliers CRE and The Retail Group were commissioned to produce a Retail Study for Rotherham town centre. The study identifies that the current retail offer is out of sync with the town centre's potential customer base. Whilst it is appealing to the mass market shoppers, it is missing out on opportunities to satisfy the other key shopper groups such as better quality, lower mid market and mid market shoppers. They all want bigger stores, recognised, national retailers, more choice and variety, a family friendly environment, better children's facilities, improved catering and an easy and convenient shopping experience.

The opportunity is for Rotherham town centre to increase its appeal to all three customer groups, particularly the mass market value shoppers and the better quality, lower mid market shoppers, by meeting more of their 'every day basics', their top up shopping and their 'work related' retail needs and requirements.

As the table below shows by 2026 there is estimated to be capacity for a further 3,135 sq.m. of convenience goods floorspace and 11,150 sq.m. of non bulky comparison goods floorspace.

Retail Floorspace Requirements to 2026	Gross floorspace (sq m)		
	2014	2019	2026
Convenience goods (i.e. frequently bought goods such as groceries)	2,060	2,410	3,135
Non-bulky comparison goods (i.e. clothing, footwear, or other goods for which the consumer expects to visit a range of shops before making a choice)	8,555	9,315	11,150

It is forecast that there will be no requirement for further floorspace for bulky comparison goods (i.e. DIY and large retail items). The table below shows the forecast need for various leisure uses:

Leisure Activity	Frequency of Visiting (1)	Rotherhams Share of Visits(2)	Consumer Demand For Attraction in Rotherham Town Centre (3)	Forecast Growth of Market in UK(4)	Need for Activity In Rotherham Town Centre(5)
Restaurants	High	Average	Average	Average	**
Pubs/Bars	High	Average	Average	Average	**
Swimming Pool	Average	Average	Average	High	*
Cinema	Average	Low	High	High	***
Museums/Libraries	Average	Average	Low	Average	*
Health Centre/Gym	Average	Average	Average	High	*
Bingo	Low	High	Low	Low	*
Nightclub/Disco	Low	Average	Low	Average	*
Ice Rink	Low	Low	High	Average	*
Theatre/Concert Hall	Low	Average	Low	Average	*
Ten-Pin Bowling	Low	High	Low	High	*
Casino	Low	Low	Low	Average	*

Notes:
(1) Frequency with which households in the survey area visit specific leisure activities.
(2) Rotherham's existing share of trips for leisure activity.
(3) Consumer demand for leisure facilities in Rotherham Town Centre (derived from household telephone survey).
(4) Forecast growth of leisure activity in UK (source: Mintel).
(5) Colliers CRE assessment of need for new/further provision of leisure activity in Rotherham Town Centre (3 stars = strong, to 1 star = limited).

A cinema stands out as being the most appropriate for Rotherham town centre, with a relatively high level of consumer demand.

The research concluded that Rotherham’s retail and leisure offer has been left behind. There is a significant need for an improved retail and leisure offer in the town centre. All of the research areas pointed to the need for bigger shops providing more choice and variety, clear anchors, more recognisable branded retailers, more clothing retailers, more quality independent operators, more and better quality catering and restaurants, more of a leisure offer – including a cinema and more of a family friendly focus. There are too many vacant units which reinforce the negative perceptions that exist amongst retailers and shoppers. The town centre’s positive attributes are not being fully utilised and are overshadowed by the negative aspects of the town. Future changes to the retail and leisure offer will need to be very clearly visible and high profile in order to start to change existing views and perceptions about the town centre.

Rotherham Town Centre: Key Issues

Rotherham Renaissance

- Rotherham town centre has been suffering long-term decline, partly due to proximity of Meadowhall and Parkgate Retail World shopping centres
- Rotherham Renaissance launched to transform the town centre
- Progress has begun with many projects completed / in-progress

Vacancy Rates

- Recent economic downturn has impacted on many town centres across the UK, Rotherham no exception
- Increase in vacancy of commercial units in the town centre – increasing to 17.6% in 2009

Retail Study

- There is a significant need for an improved retail and leisure offer in the town centre
- Potential capacity for a further 3,135 sq.m. of convenience goods floorspace and 11,150 sq.m. of non bulky comparison goods floorspace.
- A need for bigger shops providing more choice and variety, clear anchors, more recognisable branded retailers, more clothing retailers, more quality independent operators, more and better quality catering and restaurants, more of a leisure offer – including a cinema
- Too many vacant units reinforce the negative perceptions that exist amongst retailers and shoppers

Conclusions

Rotherham has gone through a major transition in recent years to recover from the downturn and massive job losses in the traditional coal and steel industries suffered during the 1980s. Rotherham has progressed on many economic and social measures, often far faster than nationally or regionally, including levels of deprivation, job creation, and inward investment. Much of this improvement has been a result of major public sector interventions with historically high levels of UK and European funding which in turn attracted new private investment. Large areas of the borough were transformed with new business parks on former old industrial / colliery sites such as at Manvers in the Dearne Valley and at Dinnington.

However significant weaknesses remain within the local economy and levels of deprivation, worklessness and entrepreneurship compare poorly to the UK average. There is now a need for Rotherham to enter into its next transitional phase of growth to close this gap. With large scale public sector funding likely to be much more limited in the future this can only be achieved in partnership and with drive from the private sector as the lead on economic growth. The recent period of deep recession, from which the UK economy is only just beginning to recover, has impacted badly on Rotherham and made this next step even more challenging.

The current output of the Rotherham economy is close to £3.7 billion but productivity per worker or output per capita is significantly lower than the UK average – closing this productivity gap would potentially increase the output of the Rotherham economy to over £4.5 billion. Rotherham showed a fall in output for 2008, the first signs of the national recession impacting on the local economy. Looking beyond this the latest projections of output for the region show significant falls expected during 2009, the Sheffield City region being the worst affected with an estimated fall of over 6%. 2010 is expected to see only a very modest rate of growth of around one percentage point for all parts of the region. The challenge for Rotherham is how to stop the gap widening again and to improve over the long-term - this assessment has highlighted the following key areas:

- The need to continue to restructure and diversify the business base
- To increase the quantity and quality of businesses, particularly in strong and emerging sectors such as low carbon industries
- Reducing reliance on large employers, many of which are in traditional sectors
- Increase levels of employment and reduce levels of economic inactivity and rates of worklessness
- Increase the skills levels of the working age population to take advantage of more highly skilled jobs / occupations
- Ensure all sections of the community are equipped to take advantage of the economic upturn

- Revitalising Rotherham town centre, improving the retail and leisure offer to reduce vacancy rates and overcome the current negative image

This must be achieved whilst taking into account the following factors:

- An ageing population with the number of working age, as a percentage of the overall population, falling
- A potentially unstable global economy, particularly due to debt problems within some countries in the Euro-zone (and the UK)
- Likely public sector (a major source of employment in Rotherham) job losses over the next few years
- Cuts in public sector funded regeneration programmes and impact on reclamation of brownfield land
- The need to improve transport infrastructure, improve connectivity and reduce congestion
- Environmental concerns including the increasing importance of reducing emissions, disposal of waste and tackling climate change

Although Rotherham is much better placed to take advantage of a sustained economic recovery than it was in the aftermath of the large scale closures in the mining and steel industries, the future remains very uncertain. The basic fundamental weaknesses in the local economy of low business numbers, high rates of worklessness, and poor skills levels have improved but still compare poorly to the national average. It is unlikely that Rotherham will benefit again from large scale public sector funding / regeneration in the foreseeable future, given the need to tackle the UK budget deficit. Future investment is therefore likely to come mainly from the private sector and Rotherham can encourage this by providing the right conditions, including a skilled workforce, to help attract new businesses to the borough.

Appendix 2

Proposed list of consultees on the draft Local Economic Assessment

RMBC – EDS
RMBC – NAS
RMBC – CYPS
RMBC – Chief Executives
Rotherham NHS
Barnsley & Rotherham Chamber of Commerce
Voluntary Action Rotherham
LSP – Achieving Board
LSP – Enterprise Board
LSP – Work & Skills Board
LSP – Learning Partnership
Yorkshire Forward
SYPTE
Government Office for Yorkshire & the Humber
South Yorkshire Police
RCAT
Dearne Valley College
DWP
Skills Funding Agency

ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS

1.	**Meeting:**	**Cabinet Member for Economic Development, Planning & Transportation**
2.	**Date:**	**19th July 2010**
3.	**Title:**	**Reallocation of RERF and LABGI funding**
4.	**Programme Area:**	**Environment and Development Services**

5. Summary

To seek Cabinet Member approval to reallocate existing RERF and LABGI allocations, in order to cover potential funding gaps for the Community Stadium and All Saints Development projects, which have arisen as a result of the Government cutting 50% of the LAA Reward Grant the Council was expecting to receive

6. Recommendations

- **To note the report.**

- **To agree that £400,000 of RERF funding and £108,737 of LABGI funding is awarded to the Community Stadium project.** ***(The award of RERF will be conditional on submission of an application form that the Economic Strategy Team endorse as meeting the criteria of the RERF Programme)***

- **To agree that £26,463 of LABGI funding is awarded to the All Saints project**

7. Proposals and Details

Due to its achievement of a number of stretch targets under the 2006-09 Local Area Agreement (LAA), Rotherham was expecting to receive around £6 million of reward grant. This was split 50/50 between capital and revenue and was due to be paid half in 2010/11 and half in 2011/12. Although the first tranche of money was paid, the 2011/12 payment has been withdrawn as part of the Coalition Government's cuts in public spending.

An allocation of £2 million had already been agreed to purchase land at Guest & Chrimes for building of a community stadium. With the total capital award from the reduced Reward Grant being £1,491,263, this left a funding gap of £508,737 against this activity

Similarly, the reductions in Yorkshire Forward's budget (£40M+ in the current year) meant that a number of proposed Geographic Programme projects have been cut or deferred, including development of the All Saints site into high quality public realm. This would also have drawn down ERDF monies, but the loss of the YF funding has meant any project is now no longer large enough to meet the £1 million threshold needed to access ERDF.

£300,000 is required to provide "temporary" public realm, of a good standard but allowing the possibility of further redevelopment should funds become available in future years. £268,500 has been approved from the reduced reward grant allocation and the remaining WNF monies. However a funding gap of £31,500 still exists.

£420,000 of RERF funding was approved by Cabinet Member on 18th January 2010 for delivery of Undercroft parking as part of the Weirside project within the Town Centre Renaissance. With the cuts in YF support meaning Weirside is indefinitely delayed, we are requesting that the funding is removed from the Undercroft parking and £400,000 of it used to fund the Community stadium.

There is also a proportion of money allocated under the Local Authority Business Grant Incentives (LABGI) that has still to be spent/allocated. This includes:-

- £117,700 allocated to the Transformers project
- £17,500 still to be allocated under "technology and innovation initiatives."

It is proposed that this £135,200 is removed from its current activity and used to fund the Community Stadium (£108,737), with the remainder (£26,463) funding All Saints Public Realm, meaning it will have £294,963 available to spend.

8. Finance

The RERF capital allocation is currently overbid by £22,112. The recouping of the £420,000 from the Undercroft parking and the allocation of £400,000 to the Community Stadium will leave an overbid of £2,112. It is expected this will be absorbed through underspend on other RERF capital projects.

9. Risks and Uncertainties

RMBC will purchase the land, but it is the responsibility of the football club to secure the finance for the construction of the Stadium.

Although the proposed works on All Saints will allow future redevelopment, it is highly unlikely that any funding will become available in the near future with the current squeeze on the public finances.

Even with the award of the funding to redevelop All Saints, the current hoardings are likely to remain in place until summer 2011, as work must be completed on Minister Yard, followed by the work on All Saints itself before they can be removed

10. Policy and Performance Agenda Implications
Delivery of the Community Stadium and the All Saints development meet the following priorities of the Rotherham Community Strategy

- Revitalise the town centre

The town centre, together with employability, has been identified as the two most important current priorities by the LSP.

11. Background Papers and Consultation
A copy of the original RERF application for the Undercroft Parking is available on request.

RMBC Finance have been consulted on this report

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