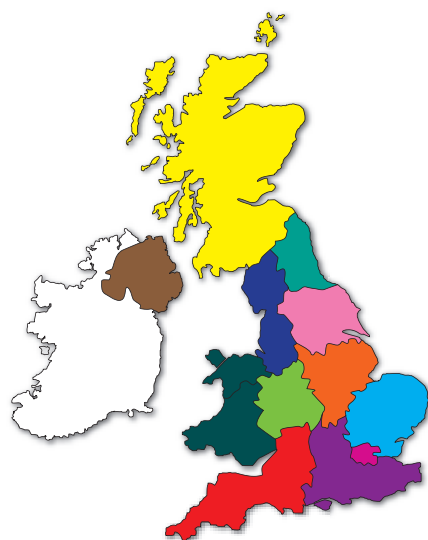


England – East of England



Cogent in the Region

The Cogent Industries are strategically important to the East of England Region:

- The East of England **manufacturing sector** is responsible for **600,000 jobs** and is the second most important contributor to regional wealth.
- The Cogent workforce accounts for **14%** of the regions manufacturing workforce and **10%** of manufacturing employers.
- The East of England **Regional Economic Strategy** highlights global leadership in developing innovation in **science, technology and research**.
- The East of England accounts for **10%** of Cogent **employers** and **8%** of Cogent **employees**.
- The East of England is focused on increasing the number of young people studying **mathematics, science, engineering and technology**.

The region has a dominant cluster of Cogent industries:

There are clusters of pharmaceutical and bioscience companies in the Cambridgeshire area and a significant number of polymer companies across the region including composites. The East is a significant centre for the offshore oil and gas industry with approximately 2,100 jobs directly dependent and 10,000 jobs indirectly dependent upon the industry. Activity is focused around Norfolk – a major landfall site for North Sea Gas production. Lowestoft & Great Yarmouth provide the onshore support base for the Southern North Sea gas fields. There is a refinery and petrochemical facility in the region with numerous marketing operations. Sizewell and Bradwell Power Stations employ people in the nuclear industry. Cogent also plays a strategic role in the East of England Manufacturing Alliance working with other SSC's.

More information on Regional and Industry Research can be found at: www.cogent-ssc.com/research

Cogent UK Sector Headlines

- **900,000 employees**
- **20,000 employers**
- **6.5% of UK GVA**
- **12% of UK manufacturing workforce**
- **7% of UK manufacturing enterprises**

Cogent Headline Figures

Key Economic Indicators

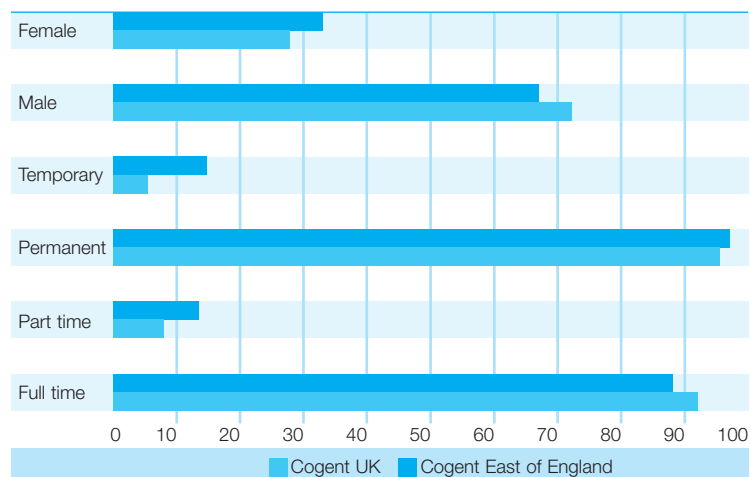
2006	Cogent EE	Cogent UK
Turnover	£9.3bn	£156bn
Cogent GVA	£3.0bn	£49bn
Cogent GVA per Employee*	£76,634	£98,394
Number of employees	39,200	500,000**
Mean weekly pay***	£555.58	£381.50

Source: Annual Business Inquiry 2005
*UK GVA average per employee £31,419
**Industry estimate of total Cogent employment 906,000
***Annual Survey of Hours and Earnings 2006

The East of England Cogent industries account for:

- **6% of Cogent sector total turnover**
- **6% of Cogent sector total GVA**

Workforce Distribution



Source: Labour Force Survey Q3 2006 – Q2 2007

Cogent Workforce

Employers by Size Band

	1-10 Employees	11-49 Employees	50-199 Employees	200+ Employees	% of Total Employers	Total Employers
Cogent – East of England	69%	23%	6%	2%	10%	1,800
Cogent – Great Britain	68%	23%	7%	2%	100%	18,500
Regional Economy – All sectors	85%	12%	3%	<1%	100%	234,100

Source: Annual Business Inquiry 2005 (Rounded)

Cogent Workforce

Regional Employment by Industry

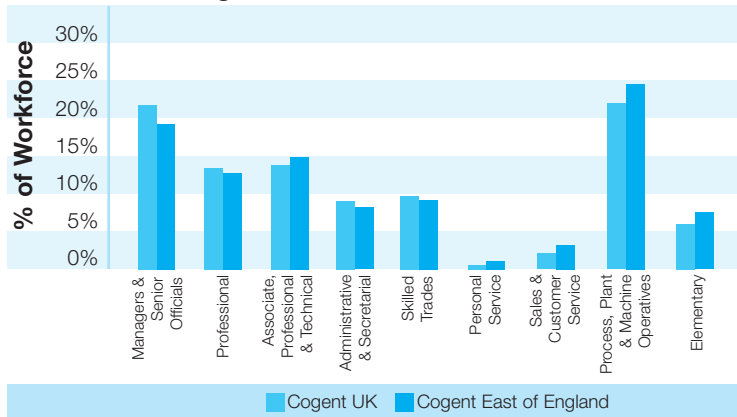
Industry Category	EE Employees	GB Total	EE Regional % of GB Total
Chemicals Manufacturing and Processing	7,400	108,300	7%
Pharmaceuticals Manufacturing	6,700	57,600	12%
Polymers Manufacturing and Processing	19,200	179,200	11%
Manufacture of Refined Petroleum Products	*	10,100	*
Oil and Gas	2,100	28,000	7%
Nuclear (inc direct supply chain)	*	49,500	*

12% of the **Polymer industry** workforce is based in the East of England.

The **Oil and Gas industry** in the East of England accounts for **7%** of the total Oil and Gas industry GB workforce.

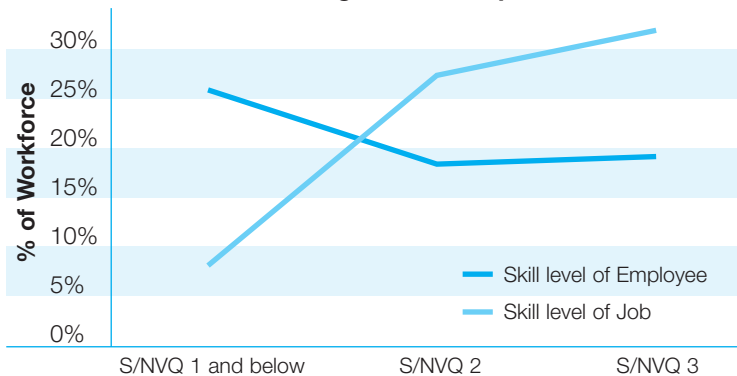
Source: Annual Business Inquiry 2005 (regional data rounded and is only Great Britain)
* Data suppressed

Occupational Distribution of the Cogent Sector in the East of England



Source: Labour Force Survey Q3 2006 - Q2 2007.

Current Workforce: The Cogent Skills Gap



Source: Labour Force Survey Q3 2006 - Q2 2007

Cogent Sector Skills Demand¹

The **proportion of vacancies** reported in the Cogent sector is **higher** than the UK average by **2%**. Hard-to-fill and skills shortage vacancies are also lower than the UK average.

INTERNAL SKILLS GAPS are **3% lower** than the UK average.

	Cogent EE	UK
Proportion of companies reporting vacancies	20%	18%
Proportion of companies reporting 'hard-to-fill' vacancies	6%	8%
Proportion of companies reporting a skills shortage vacancy	5%	6%
Proportion of companies reporting internal skills gaps	13%	16%

Cogent Sector Training¹

The proportion of companies who have trained their staff in the previous 12 months is **16% higher** than the UK incidence of training.

	Cogent EE	UK
Proportion of firms that have provided funding for staff training within the previous 12 months	80%	64%
Of those firms which provided training, the proportion of staff trained	56%	68%

¹National Employer Skills Survey 2005

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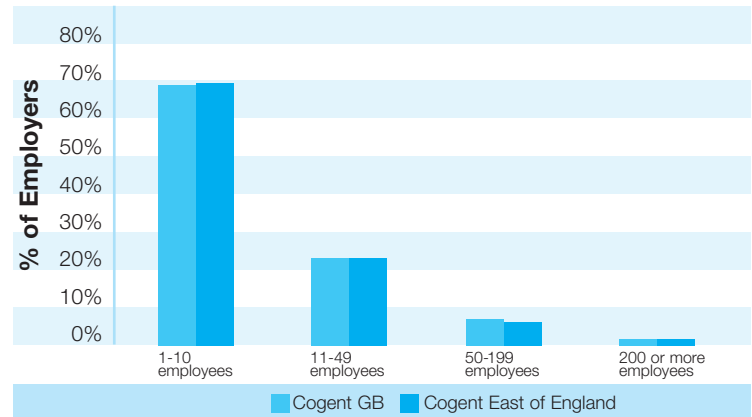
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website

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Business Size of the Cogent Sector in the East of England



Source: Annual Business Inquiry 2005

Key issues for the Cogent industries in the East of England:

- **18% SURPLUS** of the workforce qualified to Level 1 and below
- **9% DEFICIT** of the workforce qualified to Level 2
- **13% DEFICIT** of the workforce qualified to Level 3