

Working Paper 31

Employment in London by firm size

By **Richard Prothero**



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Executive summary

This report provides data and analyses on employment in London according to firm size and broad industrial sector.

The data used in this report is sourced from the Inter Departmental Business Register (IDBR) of the Office for National Statistics (ONS). The IDBR provides data nationally on both enterprises and the local units that belong to these enterprises. Whilst other published information on employment by firm size focus on analysing either enterprise level data, or local unit data, this report compiles a dataset of regional employment by firm size using both enterprise and local unit data from the single IDBR source.

The ability to analyse data at both the enterprise and local unit level on a consistent comparable basis represents an important advance. There are a number of significant advantages to using this data and as such this report is considered to provide the most robust information on employment by firm size in London currently available.

The report finds that 42 per cent of all private sector large firms in the UK (ie, enterprises employing at least 250 people across the UK) have some employment in London. London's relative specialisation in financial services can be seen by the fact that 75 per cent of all large firms in the UK in financial services have some employment in London. By contrast only 19 per cent of large UK firms in the manufacturing sector have any employment within London.

Analysis of private sector employment in London shows that 51 per cent occurs within large firms. This means that 49 per cent of private sector employment in London occurs within small and medium-sized enterprises (SMEs).

The financial services sector (76 per cent), the transport and communications sector (73 per cent), and the retail sector (68 per cent) all have a high proportion of employment within large private sector firms in London. By contrast, the wholesale sector (33 per cent) and the construction sector (34 per cent) have a relatively small proportion of employment within large firms and therefore a higher proportion within SMEs.

In addition to examining data on large firms and SMEs (using existing definitions), this report has also created a new category of ultra large firms. These have been defined as enterprises employing at least 2,500 people in the UK. The data shows that 31 per cent of private sector employment in London occurs within ultra large UK firms.

Employment in the public sector occurs almost entirely within large organisations. Thus, 97 per cent of London's public sector employment is within organisations that employ at least 250 people. In the case of the non-profit sector, 57 per cent of employment is within large organisations and 43 per cent within SMEs.

Combining the data on private, public and non-profit sectors shows that 76 per cent of London's employment is in the private sector, 17 per cent is in the public sector and 7 per cent is in the non-profit sector.

The combined data also shows that 60 per cent of employment in London is in either a large private sector enterprise, a large public sector organisation or a large non-profit organisation.

In addition to analysing employment split by UK firm size, an analysis has also been carried out identifying the number of firms who are significant London employers ie, to identify enterprises that employ a large number of people within London itself. This analysis has shown that London's 110 largest private sector firms are responsible for 24 per cent of London's total private sector employment.

This analysis also found that there are 1,365 private sector enterprises that employ at least 250 people within London (including the 110 ultra large London employers), and that these 1,365 enterprises are responsible for 49 per cent of London's total private sector employment.

In the public sector, there are 220 organisations employing at least 250 people within London and these are responsible for 97 per cent of London's total public sector employment. In the non-profit sector, there are 185 organisations employing at least 250 people in London and they are responsible for 54 per cent of London's total non-profit sector employment.

Overall, the 1,365 large private sector employers in London, the 220 large public sector employers in London and the 185 large non-profit employers are responsible for 58 per cent of London's total employment.

Introduction

Information on the size structure of firms is regularly sought and used in economic research and policy discussions. This report provides data and analyses on the size structure of firms in London and on the levels of employment according to both firm size and by broad industrial sector.

There are a number of current sources of such data. However, it is our view that none of them can provide a robust breakdown of employment in London by size of firm. Therefore, the aim of this report is to provide a more accurate measure of employment by firm size for London.

The data used in this report is sourced from the Inter Departmental Business Register (IDBR) of the Office for National Statistics (ONS). The IDBR combines administrative information on VAT traders and Pay As You Earn (PAYE) employers with ONS survey data in a statistical register comprising over two million enterprises. These comprehensive administrative sources combined with ONS survey data contribute to the coverage on the IDBR representing nearly 99 per cent of UK economic activity. The IDBR only misses some very small businesses without VAT or PAYE schemes.

Key to this report is the way in which statistical samples from the IDBR are provided and used by users. The IDBR has facilities to provide statistical samples at enterprise and local unit level where the enterprise address is generally the head office and an individual site (factory, shop etc.) in an enterprise is called a local unit. Therefore, one enterprise may consist of one or many local units.

Currently published data based on these IDBR statistical samples take a variety of approaches to presenting this data, some based on enterprise level data and some based on local unit level data. This report, however, uses both the enterprise and local unit data from the IDBR within one methodology in order to compile a dataset of regional employment by firm size. Using both the enterprise and local unit data together brings a number of significant advantages compared to using just one set of data alone and as such the approach used in this report is considered to provide the most robust dataset on employment by firm size in London currently available.

More details on the other sources of firm size data currently available, and the differences in methodology between these sources and this report can be found in Appendix A.

Section 1: London's employment by size of UK firm

Throughout Section 1 the analysis defines the size of each firm based on each enterprise's total employment in the UK. Section 2 looks at employment in London broken down by the size of an enterprise's employment within London. The full methodology used in deriving the results for Section 1 is set out in Appendix B.

Table 1 provides information on the size distribution of enterprises and is split into three sections.

- The first section (1a) splits all the private sector enterprises included in the IDBR database for the United Kingdom by size of enterprise and by main sector of business. For example, it shows that in the UK there are 198,500 enterprises whose main business is retail. It also shows that 445 of these enterprises are large (of which 110 are ultra large).
- The second section (1b) shows how many of the UK private sector enterprises detailed in section 1a have some employment in London. For example, 29,535 of the private sector UK enterprises whose main UK business is retail have some employment in London. It also shows that 295 of these enterprises are large (of which 95 are ultra large).
- The third section (1c) combines the previous two sections to show the share of total UK private sector enterprises, by sector and enterprise size, that have some London employment. For example, the share of UK private sector retail enterprises that have some employment in London is 15 per cent (calculated as $29,535/198,500$). Similarly 86 per cent of UK ultra large retail firms have some employment in London.

The results from Table 1 show that 83 per cent of the ultra large enterprises that operate in the UK have some employment in London. This is unsurprising as it would be expected that the majority of firms that employ at least 2,500 people within the UK would have at least some of that employment in London.

Table 1 also shows that 42 per cent of all large UK enterprises (including the ultra large enterprises) have some employment within London; 19 per cent of medium UK enterprises have employment in London and 17 per cent of small UK enterprises have employment in London.

Table 1: UK Private sector enterprises with employment in London - by size of enterprise

	No. of Large Enterprises	<i>of which Ultra Large</i>	No. of Medium Enterprises	No. of Small Enterprises	No. of 0 employing Enterprises	Total No. of Enterprises
1a) Total number of private sector enterprises in the UK, by size and main UK sector						
Primary and Utilities	85	10	375	51,850	102,765	155,070
Manufacturing	1,665	100	7,085	120,275	20,340	149,365
Construction	320	25	1,975	160,195	70,025	232,515
Wholesale	585	40	3,370	139,090	37,415	180,460
Retail	445	110	1,245	149,800	47,010	198,500
Hotels and Restaurants	335	50	2,095	113,065	11,980	127,475
Transport and Communications	430	65	1,455	54,830	24,855	81,565
Financial Services	325	55	695	21,450	1,295	23,770
Business Services	1,600	125	6,950	533,490	105,515	647,555
Education and Public Admin	100	5	440	19,675	2,305	22,520
Health and Social Work	190	15	2,190	53,565	930	56,880
Other Services	265	30	1,095	101,010	37,115	139,485
Total Private Sector	6,345	630	28,970	1,518,295	461,550	2,015,160
1b) Of which the following have some employment in London (sorted by size and main sector of UK enterprise)						
Primary and Utilities	20	10	25	805	335	1,180
Manufacturing	320	55	585	14,430	2,090	17,425
Construction	125	25	220	16,635	5,350	22,330
Wholesale	255	35	570	21,180	3,430	25,440
Retail	295	95	290	23,085	5,870	29,535
Hotels and Restaurants	180	45	445	15,190	1,230	17,040
Transport and Communications	205	50	350	8,125	1,670	10,355
Financial Services	245	55	385	6,215	435	7,285
Business Services	795	105	2,025	118,910	21,515	143,245
Education and Public Admin	35	-	105	2,885	270	3,295
Health and Social Work	65	15	205	7,695	135	8,105
Other Services	130	30	285	21,400	10,535	32,355
Total Private Sector	2,670	520	5,490	256,555	52,865	317,590
1c) Share of UK private sector enterprises that have some employment in London, by size and main sector of UK enterprise						
Primary and Utilities	24%	<i>n.a.</i>	7%	2%	0%	1%
Manufacturing	19%	55%	8%	12%	10%	12%
Construction	39%	100%	11%	10%	8%	10%
Wholesale	44%	88%	17%	15%	9%	14%
Retail	66%	86%	23%	15%	12%	15%
Hotels and Restaurants	54%	90%	21%	13%	10%	13%
Transport and Communications	48%	77%	24%	15%	7%	13%
Financial Services	75%	100%	55%	29%	34%	31%
Business Services	50%	84%	29%	22%	20%	22%
Education and Public Admin	35%	<i>n.a.</i>	24%	15%	12%	15%
Health and Social Work	34%	<i>n.a.</i>	9%	14%	15%	14%
Other Services	49%	100%	26%	21%	28%	23%
Total Private Sector	42%	83%	19%	17%	11%	16%

Comparing across sectors, Table 1 confirms that, relative to the rest of the UK, London tends to specialise in services and not in manufacturing. There is a particularly strong focus in London on the financial services sector. Thus, 75 per cent of large UK financial services enterprises (and all ultra large financial services enterprises) have employment in London, as do 55 per cent of medium financial services enterprises and 29 per cent of small financial services enterprises.

By contrast, only a relatively low proportion of UK enterprises specialising in manufacturing have some employment in London with just 19 per cent of large UK manufacturing enterprises employing staff in London compared to a 42 per cent average across all sectors.

Amongst medium and small enterprises, those UK enterprises specialising in business services and other services, as well as financial services, are more likely than those in other sectors to be located, or have some employment, within London.

It would be very interesting to be able to compare the results in Table 1 with similar Tables for other regions of the UK to see the extent to which these results vary across the UK. For instance, it might be expected that a slightly higher proportion of UK large enterprises may have employment in London than in other regions. However, at the present time we do not have data for other regions to make such a comparison. This is an area for potential future work.

Table 2 shows how the employment that is located in London is split by sector and by size of enterprise. Table 2 uses the same size definition as used in Table 1, ie, size of enterprise at the UK level, but redistributes employment by sector depending on the sector of activity of each local unit – not the predominant sector of activity of the UK enterprise (as was the case for Table 1). **As a result, Table 2 is not directly comparable with Table 1.**

Table 2 shows, for example, that there are 250,010 people working in the retail sector in London who work for large UK enterprises. More precisely what this is telling us is that 250,010 people work in local units (branches) within London which give their main business sector as retail and furthermore that these local units belong to enterprises which at the UK level are defined as large because they employ at least 250 people in total across the UK¹.

¹ Note it cannot be assumed that these 250,010 people all work for 'large retail enterprises'. Rather it is strictly only correct to say that they work in the retail sector in London (at local unit level) and that they work for a large UK enterprise. This is because it is possible in some cases that the enterprise overall may specialise in a different sector of the economy (at the UK level) but nevertheless have a proportion of its UK workforce employed within the London retail sector. A hypothetical example might be Manchester United Football Club (MUFC). Suppose MUFC were defined as a large enterprise at the UK level (ie employing at least 250 people across the UK). At the UK level the predominant sector of activity would be classified as 'other services' (where 'sporting activities' are classified). Then in London suppose MUFC has a shop selling replica football strips etc. In London this local unit will be classified as 'retail' (not the 'other services' sector) although it would still be classed as being a large enterprise because MUFC is a large enterprise at the UK level.

Table 2: Private sector London employment, by local unit sectors and by size of UK enterprises

	Employment in Large Enterprises	<i>of which Ultra Large</i>	Employment in Medium Enterprises	Employment in Small Enterprises	Employment in 0 employing Enterprises	Total Employment
Primary and Utilities	8,030	5,010	1,565	3,505	485	13,580
Manufacturing	78,625	32,940	38,635	75,570	2,685	195,520
Construction	37,070	14,405	17,615	56,490	6,310	117,485
Wholesale	66,425	25,255	35,235	98,350	4,340	204,350
Retail	250,010	211,965	17,935	89,340	8,040	365,325
Hotels and Restaurants	139,555	91,845	37,855	89,845	1,870	269,120
Transport and Communications	178,145	131,605	25,560	40,055	1,900	245,655
Financial Services	226,105	153,910	33,610	36,010	340	296,065
Business Services	468,920	215,735	165,015	393,995	23,805	1,051,730
Education and Public Admin	13,780	1,855	7,430	16,705	315	38,240
Health and Social Work	33,210	21,685	15,590	54,685	205	103,695
Other Services	80,405	45,320	24,385	80,835	13,280	198,905
Total	1,580,280	951,530	420,430	1,035,385	63,575	3,099,670
percentage shares						
Primary and Utilities	59%	37%	12%	26%	4%	100%
Manufacturing	40%	17%	20%	39%	1%	100%
Construction	32%	12%	15%	48%	5%	100%
Wholesale	33%	12%	17%	48%	2%	100%
Retail	68%	58%	5%	24%	2%	100%
Hotels and Restaurants	52%	34%	14%	33%	1%	100%
Transport and Communications	73%	54%	10%	16%	1%	100%
Financial Services	76%	52%	11%	12%	0%	100%
Business Services	45%	21%	16%	37%	2%	100%
Education and Public Admin	36%	5%	19%	44%	1%	100%
Health and Social Work	32%	21%	15%	53%	0%	100%
Other Services	40%	23%	12%	41%	7%	100%
Total	51%	31%	14%	33%	2%	100%

Table 2 shows that just over half of private sector employment in London takes place in large UK enterprises. Thus, 51 per cent of all private sector workers in London work for large enterprises compared to 49 per cent who work for small and medium-sized enterprises.

An alternative way of looking at this data in Table 2 is to say that:

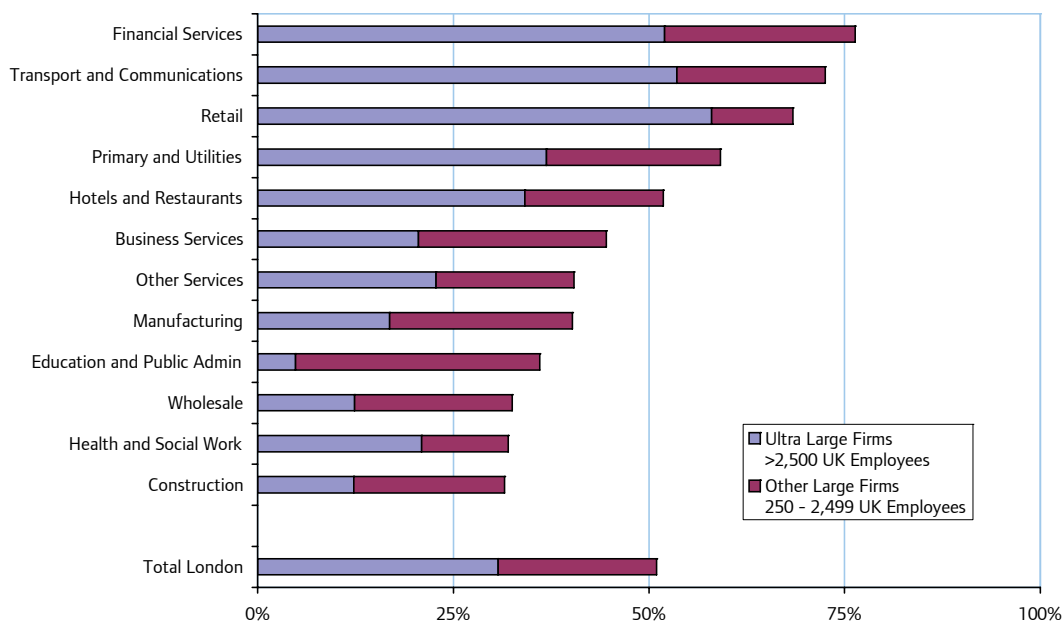
- 31 per cent of private sector employment is in enterprises employing at least 2,500 people (ie, ultra large firms)
- 34 per cent of private sector employment is in enterprises employing between 50-2,499 people
- 35 per cent of private sector employment is in enterprises employing less than 50 people (ie, small firms).

Examining the data by sector, it shows that there are three industrial sectors which in London have a very high proportion of employment within large (including ultra large) enterprises. These are the:

- financial services sector (76 per cent of London employment within large enterprises and 52 per cent within ultra large enterprises);
- transport and communications sector (73 per cent of London employment within large enterprises and 54 per cent within ultra large enterprises);
- retail sector (68 per cent of London employment within large enterprises and 58 per cent within ultra large enterprises).

These results are illustrated in Figure 1 which shows the percentage of employment within each sector that occurs in large firms.

Figure 1: Share of private sector employment within large firms by industrial sector



Source: Inter-Departmental Business Register, Office for National Statistics Table prepared by LDA/GLA

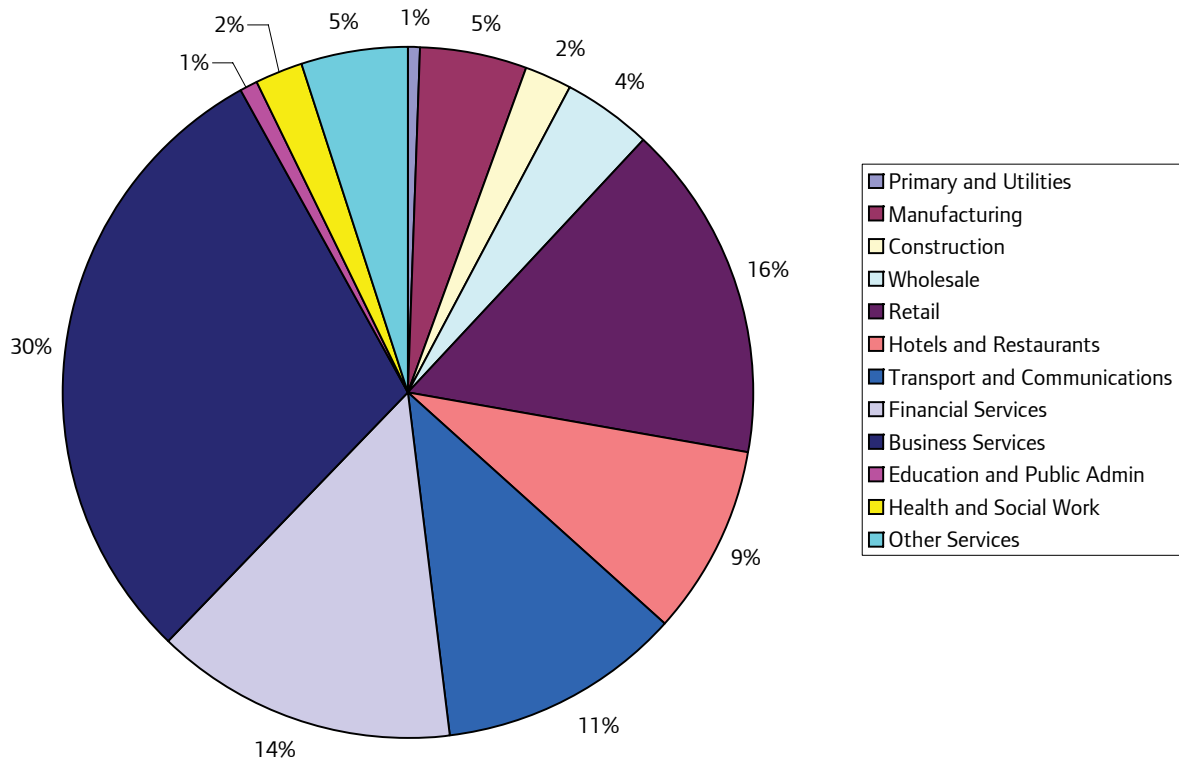
Table 2 also shows that there are three industrial sectors where the majority of employment (in the private sector) occurs within small firms (including zero-employing firms). These sectors are:

- construction (53 per cent of London employment within small enterprises)
- health and social work (53 per cent of London employment within small enterprises)
- wholesale (50 per cent of London employment within small enterprises).

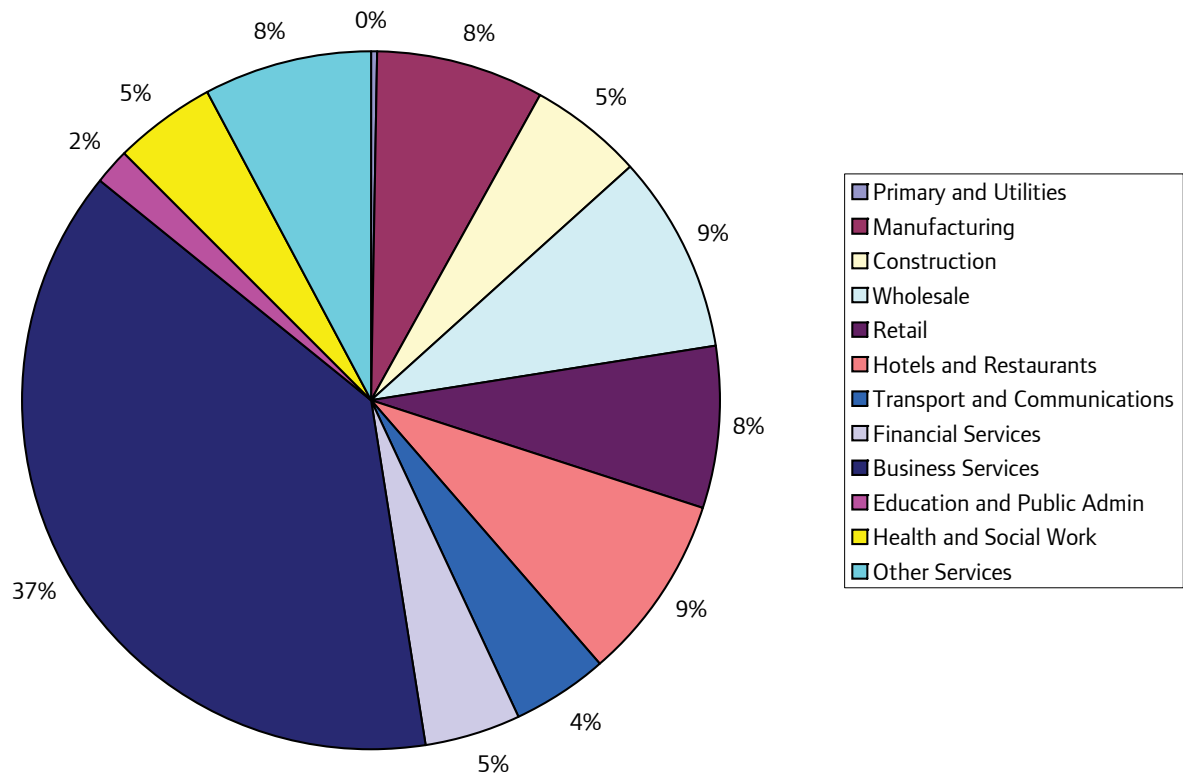
These results appear consistent with typical perceptions of the London economy. In the financial services sector there are a number of large national and multinational banks that dominate the high-street banking sector whilst the City of London also has a significant number of large multinational companies working within it. Similarly, in the retail sector a lot of employment occurs within the UK's major supermarket chains and within branches of national comparison goods stores that typically have branches on many London high streets.

The results from Table 2 also allows an analysis to be carried out concerning the sectors in which private sector employment in large enterprises is to be found and comparing this to the data for small and medium-sized enterprises. Figures 2a and 2b show these results.

Figure 2a: Employment in large private sector enterprises by sector



Source: Inter-Departmental Business Register, Office for National Statistics Table prepared by LDA/GLA

Figure 2b: Employment in private sector SMEs by sector

Source: Inter-Departmental Business Register, Office for National Statistics Table prepared by LDA/GLA

Figure 2a shows that 80 per cent of private sector large firm employment in London occurs within 5 industrial sectors: business services (30 per cent), retail (16 per cent), financial services (14 per cent), transport and communications (11 per cent), and hotels and restaurants (9 per cent).

Figure 2b shows that amongst private sector SMEs, the largest sector by some distance is the business services sector, which accounts for 37 per cent of SME private sector employment in London. There are then five sectors that have 8–9 per cent of SME employment each. These are manufacturing, wholesale, retail, hotels and restaurants, and other services.

Comparing Figures 2a and 2b shows that employment in both the financial services sector and the retail sector is most likely to be found within large enterprises. Thus, 14 per cent of total large enterprise employment in London is in financial services compared to just 5 per cent of total SME employment. Similarly, 16 per cent of total large enterprise employment in London is to be found in the retail sector compared to the retail sector's share of total SME employment in London which is just 8 per cent.

In contrast a number of sectors are more prevalent within SMEs. Thus, business services account for 37 per cent of SME employment in London compared to 30 per cent of large enterprise employment. Manufacturing, construction and wholesale employment is also more common within London amongst SMEs than amongst large enterprises.

Table 3 combines the total results from Tables 1b and 2 to show the average number of people employed per enterprise for the different enterprise size bands. Thus, Table 3 shows for example that the 2,670 large UK enterprises which have some employment in London (see Table 1b) employ on average 592 people each within London – thus providing London employment of 1.58 million (see Table 2).

The majority of this 1.58 million is actually to be found within ultra large UK enterprises that operate in London. Thus, Table 3 shows that the 520 ultra large UK enterprises that have employment in London employ on average 1,830 people each in London to provide total London employment of 0.95 million.

Table 3: Average employment by size of enterprise

	in Large Enterprises	<i>of which Ultra Large</i>	in Medium Enterprises	in Small Enterprises	in 0 employing Enterprises	Total Employment
No. of UK Enterprises with employment in London	2,670	520	5,490	256,555	52,865	317,590
Total London Employment Across these Enterprises	1,580,280	951,530	420,430	1,035,385	63,575	3,099,670
Average Employment / Enterprise	592	1,830	77	4	1	10

For the reasons mentioned earlier, it is only possible to make this analysis for ‘total’ employment data. At the sectoral level it is not appropriate because enterprises and employment are allocated to the industrial sectors in different ways in Tables 1 and 2.

Public and non-profit sectors

The above analysis has focused solely on private sector employment. Data is, however, also available for public sector organisations and for non-profit organisations. Because of disclosure constraints, this data is not provided in this report split by industrial sector. However, total employment in London and its split by size of UK organisation is provided and is shown in Table 4.

Table 4: Employment in London by size of enterprise in public and non-profit sectors

	Employment in Large Enterprises	<i>of which Ultra Large</i>	Employment in Medium Enterprises	Employment in Small Enterprises*	Total Employment
Public Sector	683,640	584,595	15,860	2,365	701,865
Non-Profit	158,600	57,710	54,825	63,615	277,045

percentage shares

Public Sector	97%	83%	2%	0%	100%
Non-Profit	57%	21%	20%	23%	100%

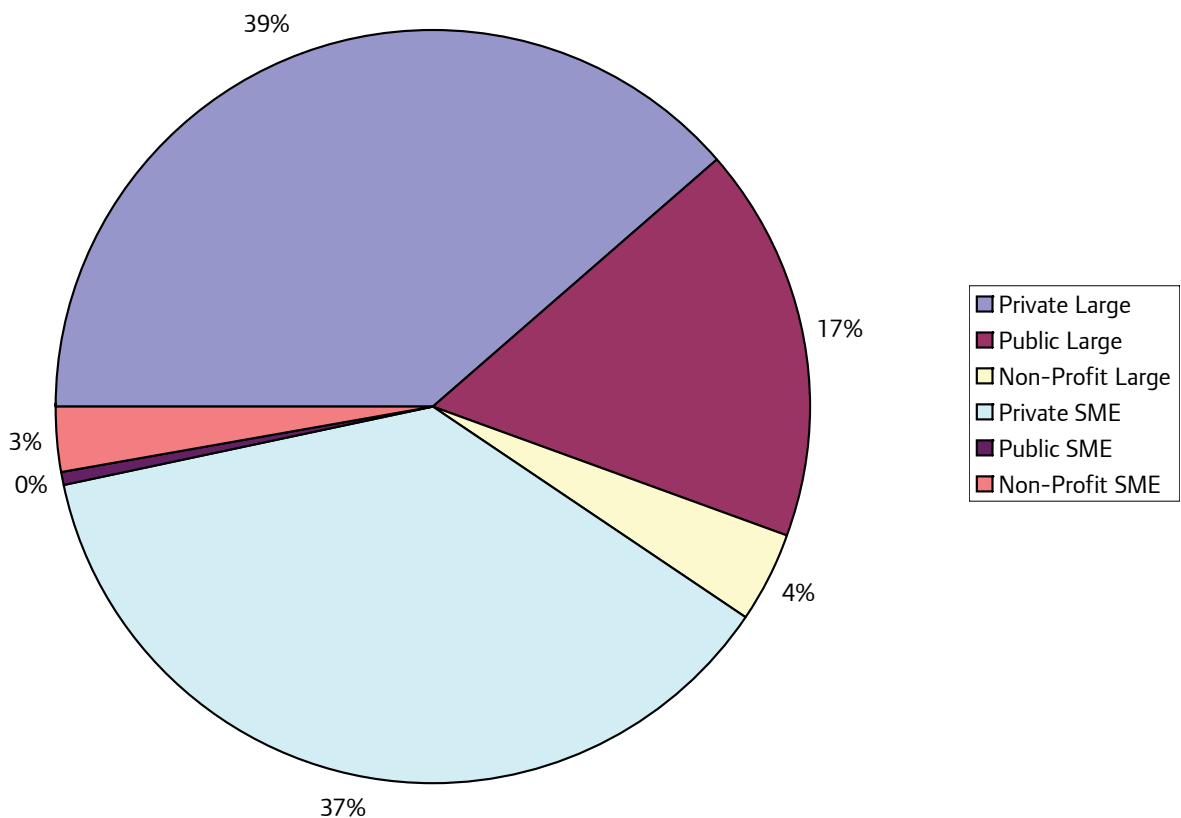
* including employment in 0 employing enterprises

This data shows that employment in the public sector occurs almost entirely within large organisations. Thus, 97 per cent of London's public sector employment is within organisations that employ at least 250 people. In the case of the non-profit sector, 57 per cent of employment is within large organisations and 43 per cent within SMEs.

Total London employment

The public sector employment data can be combined with the private sector data to provide a full picture of employment within London. This data (represented in Figure 3) shows that based on data from the IDBR, 76 per cent of London's employment is in the private sector, 17 per cent is in the public sector and 7 per cent is in the non-profit sector. Sixty per cent of employees in London work for a large private sector enterprise, a large public sector organisation or a large non-profit organisation.

Figure 3: London employment by firm size and private/public/non-profit status, with firm size defined by UK employment levels



Source: Inter-Departmental Business Register, Office for National Statistics Table prepared by LDA/GLA

Summary of Section 1

- Section 1 has investigated how employment in London is split by enterprise size, with the size of an enterprise defined by the level of its total UK employment.
- The results show that 42 per cent of all large private UK enterprises (including the ultra large enterprises) have some employment within London. This varies by sector with 75 per cent of large UK financial services enterprises having some employment in London but only 19 per cent of large UK manufacturing enterprises employing staff in London.
- The majority of private sector employment in London takes place in large enterprises. Thus, 51 per cent of all private sector workers in London work for large enterprises compared to 49 per cent who work for SMEs. An alternative way of splitting the data shows that: 31 per cent is in enterprises employing at least 2,500 people (ie, ultra large firms); 34 per cent is in enterprises employing between 50-2,499 people; and 35 per cent is in enterprises employing less than 50 people (ie, small firms).
- The financial services sector, the retail sector and the transport and communications sector all have a high share of their total private sector employment within large firms. By contrast, employment within the construction and wholesale sectors are to be found largely within SMEs.
- Employment in the public sector is almost entirely to be found within large organisations.
- Combining the private sector analysis with data on the public sector and the non-profit sector shows that 76 per cent of London's employment occurs within private sector firms. It also shows that 60 per cent of all employment in London is within a large private sector enterprise, a large public sector organisation or a large non-profit organisation.

Section 2: Investigating large London employers

In the preceding section, the split of employment in London between large, medium and small enterprises – based on defining the size of enterprises according to their total UK employment – was investigated. Therefore, if an enterprise employed 10 people in London but 1,000 over the whole of the UK, then the 10 people employed in London would be categorised as working for a large firm.

We consider that this is the correct way to divide London's employment by size of firm and therefore the results from Section 1 are those we consider appropriate for any analysis or discussion on splitting London's total employment by firm size.

However, it is also possible to undertake a slightly different line of analysis in order to obtain some further informative results to add to those in the preceding section. In particular, using the IDBR database we are able to investigate the size of London's employers based solely on their London employment. This will enable us to reach results such as "the x largest employers in London account for y employment". Thus, whilst the previous section asked "how many people work for large (UK) enterprises", this section asks "how many people work for large London employers".

To return to the example above, if an enterprise employed 10 people in London but 1,000 over the whole of the UK, then in this section that enterprise would be considered a 'small London employer' because it employs less than 50 people within London.

Details of the exact methodology used to derive the results in this section are set out in Appendix C.

Results

Table 5 shows the enterprises operating in London split according to the amount of London employment each one provides and the main sector that they operate in within London.

Table 5 shows that there are 1,365 private sector firms operating in London who employ more than 250 people within London and 110 of these are ultra large firms who employ at least 2,500 people within London.

Note the data in Table 5 covers the same enterprises as that in Table 1b. The difference is that in Table 1 firms were split by size based on their UK size whereas in Table 5 they are split by size based only on their London employment. Thus, the 1,365 large employers in Table 5 are a sub-set of the 2,670 large enterprises identified in Table 1b. In other words, out of the 2,670 firms that employ at least 250 people in the UK, 1,365 firms employ at least 250 people in London and the remainder employ some people in London but less than 250.

Similarly, the 110 ultra large London employers identified in Table 5 are a subset of the 520 ultra large UK enterprises identified in Table 1b.

Table 5: Number of London private sector enterprises, by size of London workforce and main London sector

	No. of Large London Employers	<i>of which Ultra Large London Employers</i>	No. of Medium London Employers	No. of Small London Employers	No. of 0 employing Enterprises in London	Total No. of Enterprises
Primary and Utilities	5	0	15	825	335	1,180
Manufacturing	90	5	450	14,600	2,090	17,230
Construction	50	0	225	16,705	5,350	22,325
Wholesale	85	0	455	21,505	3,430	25,480
Retail	130	20	280	23,355	5,870	29,635
Hotels and Restaurants	110	10	430	15,255	1,230	17,030
Transport and Communications	105	15	310	8,280	1,670	10,360
Financial Services	155	20	390	6,305	435	7,290
Business Services	480	25	1,755	119,550	21,520	143,305
Education and Public Admin	20	0	85	2,920	270	3,300
Health and Social Work	35	5	180	7,755	135	8,105
Other Services	90	5	275	21,455	10,535	32,350
Total Private Sector	1,365	110	4,850	258,500	52,875	317,590

Table 6 splits London's private sector employment by sector according to the sector of each local unit and by firm size based on the level of London employment of each enterprise. Note data at a sector level in Table 6 is not directly comparable to data at the sector level in Table 5. Such a comparison can only be made for the 'total private sector' row in both Tables and not when split by sector.

Table 6 shows that 49 per cent of London's total private sector employment occurs amongst large London employers, ie, amongst the 1,365 private sector enterprises that employ at least 250 people within London.

A further 15 per cent of London's private sector employment occurs amongst medium London employers ie, amongst the 4,850 enterprises that employ between 50 and 249 people within London.

The remaining 36 per cent of London's private sector employment occurs amongst London's SMEs (including 0 employing enterprises) ie, amongst the 311,375 enterprises that employ less than 50 people within London.

The data for ultra large employers are a subset of the data for large London employers. Table 6 shows that 24 per cent of London's private sector employment occurs within ultra large London employers ie, amongst the 110 enterprises that employ at least 2,500 people each within London.

Table 6: Private sector employment in London, by local unit sectors and by enterprise size based on London employment

	Employment in Large London Employers	<i>of which in Ultra Large London Employers</i>	Employment in Medium London Employers	Employment in Small London Employers	Employment in 0 employing London Enterprises	Total Employment
Primary and Utilities	7,525	3,110	1,810	3,765	485	13,580
Manufacturing	72,870	15,805	42,575	77,395	2,685	195,520
Construction	32,765	9,395	21,090	57,325	6,305	117,485
Wholesale	54,655	7,310	42,885	102,470	4,340	204,350
Retail	236,440	163,890	28,320	92,530	8,035	365,325
Hotels and Restaurants	135,490	73,635	41,545	90,225	1,870	269,120
Transport and Communications	172,090	113,020	29,730	41,935	1,900	245,655
Financial Services	221,815	145,000	37,315	36,595	340	296,065
Business Services	451,815	172,485	176,055	400,090	23,765	1,051,730
Education and Public Admin	12,470	155	8,320	17,120	310	38,240
Health and Social Work	30,640	15,145	17,575	55,275	205	103,695
Other Services	77,320	24,415	27,015	81,290	13,280	198,905
Total Private Sector	1,505,895	743,365	474,235	1,056,015	63,520	3,099,670
percentage shares						
Primary and Utilities	55%	23%	13%	28%	4%	100%
Manufacturing	37%	8%	22%	40%	1%	100%
Construction	28%	8%	18%	49%	5%	100%
Wholesale	27%	4%	21%	50%	2%	100%
Retail	65%	45%	8%	25%	2%	100%
Hotels and Restaurants	50%	27%	15%	34%	1%	100%
Transport and Communications	70%	46%	12%	17%	1%	100%
Financial Services	75%	49%	13%	12%	0%	100%
Business Services	43%	16%	17%	38%	2%	100%
Education and Public Admin	33%	0%	22%	45%	1%	100%
Health and Social Work	30%	15%	17%	53%	0%	100%
Other Services	39%	12%	14%	41%	7%	100%
Total Private Sector	49%	24%	15%	34%	2%	100%

For data by sector it is not possible to directly compare the results in Table 6 with those in Table 5. Nevertheless, Table 6 does give a number of clear results in terms of the spread of employment by sector and firm size.

Table 6 shows that 75 per cent of financial services employment in London occurs within large London employers ie, enterprises that employ at least 250 people in London. The transport and communications sector and the retail sector are two other sectors that have a high proportion of their London workforce operating within large London employers at 70 per cent and 65 per cent respectively.

The wholesale sector by contrast has over half of its London employment occurring within London's SMEs ie, enterprises that employ less than 250 people in London. The construction sector and the health and social work sector also have a similarly high share of private sector employment within London's SMEs.

Data on large firms in Table 6 and in Table 2 can be compared. Whilst Table 6 shows that 49 per cent of London employment is within large London employers, Table 2 showed that 51 per cent of London employment is within large UK enterprises. The 2 per cent difference between these figures is accounted for by enterprises which are large in terms of their UK employment (ie, they employ at least 250 people in the UK so are termed a large UK enterprise in Table 2) but which are not large in terms of their London employment (ie, employ less than 250 people in London and are therefore termed either medium or small London employers in Table 5).

Table 6 also shows that 24 per cent of London employment is within ultra large London employers whilst Table 2 shows that 31 per cent of London employment is within ultra large UK enterprises. This infers that 7 per cent of London's employment occurs in firms that are ultra large in terms of their UK employment but not ultra large in terms of their London employment.

Table 7 reaffirms the total London data as discussed above. It shows that the 110 ultra large London employers on average employ 6,758 people each within London with total London employment across ultra large London employers at 743,365.

Table 7: Employment by enterprise split by London employment level

	Employment in Large London Employers	<i>of which in Ultra Large London Employers</i>	Employment in Medium London Employers	Employment in Small London Employers	Employment in 0 employing London Enterprises	Total Employment
No. of Enterprises split by Size of their London Employment	1,365	110	4,850	258,500	52,875	317,590
Total London Employment Across these Enterprises	1,505,895	743,365	474,235	1,056,015	63,520	3,099,670
Average Employment/Enterprise	1,103	6,758	98	4	1	10

As mentioned earlier, it is only possible to make the analysis in Table 7 for 'total' employment data. At the sectoral level it is not appropriate because enterprises and employment are allocated to the industrial sectors in different ways in Tables 5 and 6.

Public and non-profit sectors

The above analysis has focused solely on the private sector. However, data is also available for public sector organisations and for non-profit organisations.

The public sector data shows that there are approximately 220 large employers within the public sector in London (ie, organisations that employ at least 250 people within London). Between them, these 220 organisations employ approximately 685,000 people, which is 97 per cent of the total public sector employment in London.

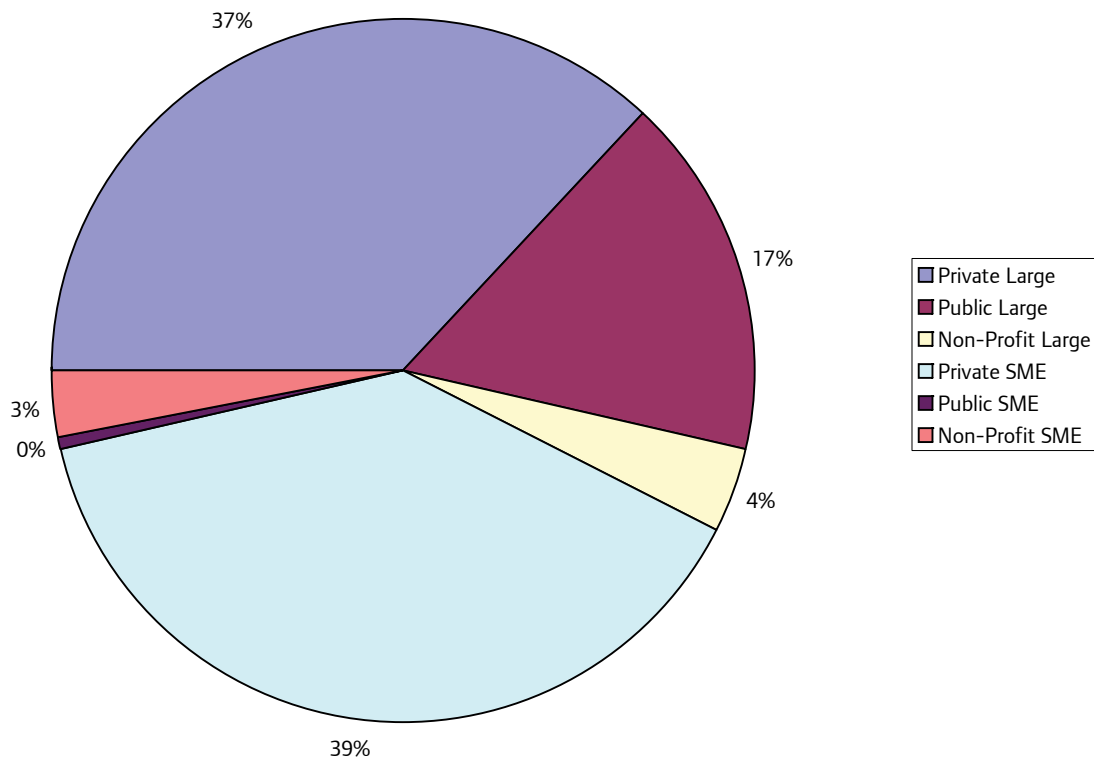
In the non-profit sector, there are approximately 185 large employers who employ at least 250 people in London. Between them they employ approximately 150,000 people, which is 54 per cent of the total non-profit sector employment in London.

Total London employment

Based on the above private sector, public sector and non-profit sector analysis, Figure 4 splits total employment in London according to the size of employers. It shows that 37 per cent of employment occurs amongst the private sector firms that employ at least 250 people in London with a further 17 per cent occurring amongst the public sector organisations that employ at least 250 people in London and 4 per cent within non-profit organisations that employ at least 250 people in London².

² Thus, 58 per cent of London's employment is within enterprises that employ more than 250 people within London. This compares to 60 per cent of London's employment which is to be found within large UK enterprises (see Figure 3). The 2 per cent difference is accounted for by people who are employed in enterprises that are defined as large in terms of their UK employment, but not in terms of their London employment (ie, by firms that employ at least 250 people in the UK, but less than 250 people in London).

Figure 4: London employment by firm size and private/public/non-profit status – size of firm defined by each firm’s London employment level



Source: Inter-Departmental Business Register, Office for National Statistics Table prepared by LDA/GLA

Summary of Section 2

- Section 2 investigates employment in London by firm size where the size of a firm is based on the actual London employment of each enterprise, rather than its UK size.
- The results show that London’s 110 ultra large private sector firms each employ an average of 6,758 people and are jointly responsible for 24 per cent of London’s total private sector employment.
- 49 per cent of London’s private sector employment is accounted for by the 1,365 enterprises (including the 110 ultra large companies) that each employ at least 250 people within London.
- In the public sector, there are 220 organisations employing at least 250 people and these are responsible for 97 per cent of total public sector employment in London. In the non-profit sector, there are 185 organisations employing at least 250 people in London and they are responsible for 54 per cent of total non-profit sector London employment.
- Overall, the 1,365 large private sector employers in London, the 220 large public sector employers in London and the 185 large non-profit employers are responsible for 58 per cent of London’s total employment.

Appendix A: Sources of data on firm size and employment

There are currently three main sources of data that researchers can examine for information on employment by firm or workplace size. These are the Annual Business Inquiry, the SME Statistics, and the ONS publication “UK Business Activity, Size and Location”.

The data underlying all three of these sources is the same, namely the ONS’ Inter Departmental Business Register (IDBR). However, the way in which IDBR data is presented differs in the three information sources. To understand these differences, and the new approach taken in this working paper, it is necessary to understand the way in which the IDBR collects and distributes data, particularly concerning the difference between enterprise data and local unit data.

The IDBR combines administrative information on VAT traders and Pay As You Earn (PAYE) employers with ONS survey data in a statistical register comprising over two million enterprises. These comprehensive administrative sources combined with ONS survey data contribute to the coverage on the IDBR representing nearly 99 per cent of UK economic activity. The IDBR misses some very small businesses without VAT or PAYE schemes (self employed and those with low turnover and without employees).

Key to the discussions in this working paper is the way in which statistical samples from the IDBR are provided to users. The IDBR has facilities to provide statistical samples at enterprise and at local unit level where the enterprise address is generally the head office and an individual site (factory, shop etc.) in an enterprise is called a local unit. Therefore, one enterprise may consist of one or many local units.

Currently published data based on these IDBR statistical samples take a variety of approaches to presenting this data, some based on enterprise level data and some based on local unit level data. These approaches are briefly described in the following paragraphs.

Annual Business Inquiry

The annual business inquiry (ABI) is a business survey which uses information from the IDBR to create its initial sample. The ABI’s workplace analysis, available via Nomis (a web-based database of labour market statistics), provides a survey of the number of workplaces and their size (in terms of employees) in an area broken down by detailed industry (4 digit SIC).

ABI data can be broken down to a detailed industrial level. The ability to disaggregate the data at the industrial and geographic level makes the use of this data popular when describing regional economies. Occasionally, however, tables based on this analysis may be misrepresented as describing the size of firms in a region. However, this is incorrect and it is not possible to use ABI data to assign employment in an area by size of firm.

This is because data obtained from the ABI workplace analysis does not split employment in a region by the size of firms or businesses. Rather it assigns employment to ‘data units’ and

these data units do not readily correspond to the commonly used terms firms, companies or businesses by which employers are sometimes identified. Instead, they are roughly equivalent to workplaces³. This means that when a size analysis is carried out, the size bands refer to the number of employees at each data unit and not to the size of the parent company.

Thus, for example, employers working for a major supermarket chain in London will not be assigned to a sizeband based on the size of the parent company, but instead will be assigned based on the size of their branch. Thus, in the retail sector, ABI data shows that many retail employees work in small and medium-sized workplaces. However, this must not be interpreted as meaning these employees work for small or medium-sized firms – as many of these small and medium-sized workplaces are actually branches of large national and multinational firms.

Overall, therefore, the ABI provides a highly detailed dataset describing employment split by the size of workplaces. However, the ABI does not provide data on employment split by size of firm.

Small and medium-sized enterprise (SME) statistics

The Enterprise Directorate Analytical Unit at the Department for Business Enterprise & Regulatory Reform produces an annual statistics bulletin on small and medium-sized enterprises (SME). The SME publication contains a breakdown of the number of businesses in the UK, from small traders with no employees to those with 500 or more employees by size classification. It also shows the contribution to total employment and turnover made by businesses of different sizes, with an industry breakdown.

The SME statistics are based largely on the IDBR database. However, the coverage in the IDBR is known to be incomplete among the very smallest businesses. Therefore, the SME statistics also include an estimate of the number of unregistered businesses, their employment and turnover. This estimate is represented in the zero employee sizeband of the SME statistics.

Biannually, the SME statistics are published on a regional basis. The regional statistical press release, which relates solely to the private sector⁴, provides employment allocated to three size bands of enterprise: small enterprises are defined as those with 0-49 employees; medium enterprises are defined as those with 50-249 employees; and large enterprises are defined as those with 250 or more employees. The tables then split regional private sector data into ten

³ They are roughly equivalent to workplaces but because of the way the data are collected two or more units can be present in the same workplace. For example, a bank may have several branches and offices in a city; each one of these would be counted as a separate data unit. A single workplace can be counted as two data units where there are two distinct business activities at the same site. Each business activity will be coded to a separate SIC code and, therefore, counted as a separate data unit.

⁴ Private sector comprising companies (including public corporations/nationalised bodies), partnerships and sole proprietors. The SME Statistics private sector definition therefore differs from the definition in this analysis which excludes public corporations and nationalised bodies.

sizebands. This data is the most commonly used data by researchers wishing to describe the employment structure of a region by firm size.

Whilst this SME data provides a very useful information source on the number of small and medium-sized businesses, and is useful for a number of purposes, it nevertheless cannot be considered a definite source of data for analysing regional employment by firm size. The reason for this is that where enterprises have employees in more than one region or country, these employees are counted in the SME statistics only in the region in which the enterprise is registered. This means that the estimates of total employment in a region will differ from actual employment because employees who work in one region but belong to an enterprise based in a different region will be allocated to the region in which the enterprise is based rather than the region in which they actually work.

In other words, to return to the methodology of the IDBR, the SME statistics assign employment by region, based only on the location of the enterprise (ie, the address of its head office). The SME statistics do not take any account of the location of the local units. This means that, particularly for large enterprises, there may be some biases in the SME data where employees are not being correctly allocated to the region in which they actually work. For example, in the SME statistics, all UK employees for Sainsbury's will be allocated to London, as this is the location of its head office. In reality, of course, employees of Sainsbury's are spread across all UK regions.

ONS: UK business activity, size and location

A third source for data on firm size is the annual ONS publication, "UK Business Activity, Size and Location". This publication presents a snapshot of Value Added Tax (VAT) registered businesses in the UK as at March of each year. It presents analysis of these VAT-registered businesses by business activity, their size of employment or turnover and their geographical location.

By focusing solely on VAT-based enterprises and local units, this publication excludes 500,000 PAYE only enterprises held on the IDBR⁵. The absence of these PAYE enterprises mean that the data in this publication cannot be considered comprehensive. In particular, this means that the coverage of this publication in VAT exempt areas such as education, health and public administration is incomplete. Nevertheless, the publication does provide a useful overview of data in the IDBR, which otherwise would not be available⁶.

⁵ Work relating to implementing recommendations from the Allsopp 'Review of Statistics for Economic Policymaking' is being undertaken by the ONS to permit the inclusion of the remaining PAYE units that are currently excluded from this publication. The work has extended to the identification of additional units that are registered with Companies House but are not included on the IDBR. While the work is proceeding the ONS are continuing to exclude these PAYE units from the publication.

⁶ It should be noted that the data in the "UK Business Activity, Size and Location" publication are not directly comparable to those in the Small and medium enterprise (SME) statistics, despite the fact both are based on the IDBR. This is due to differences in coverage, timing and methodology. Whilst the publication "UK Business Activity, Size and Location" only includes businesses with a VAT registration and excludes those with both zero turnover and employment, SME statistics are based on the broadest definition of a business, including those without a VAT registration and incorporating an estimate of the number of small unregistered businesses.

In particular, the report provides data on the location of VAT-registered enterprises and local units in each local authority in the UK. For example, it shows that in 2007 Camden was home to 16,995 enterprises and 19,995 local units. Additionally, it splits this data by employment size band, showing for example that Camden is home to 130 large (at least 250 employees) enterprises and has 120 local units employing at least 250 people. The report also counts enterprises and local units by industry (SIC 2 digit) split by region.

What the “UK Business Activity, Size and Location” publication does not do is split regional employment by size band. This is because the report focuses on providing information on the distribution of enterprises and local units. Thus, having counted the number of enterprises in London it then splits these by employment size band, and also by industry, and also by local authority. However, it only ever presents data on the number of enterprises. It doesn’t provide employment data.

Determining a new set of figures

The ABI, the SME statistics and the “UK Business Activity, Size and Location” publication all provide useful data series on workplace and firm size. However, none of them is able to provide a comprehensive breakdown of employment by firm size and region. This is because none of these data sources bring together both enterprise and local unit data in terms of analysing employment, and this is the key requirement if such a breakdown is to be achieved.

Instead, the ABI focuses solely on local unit data – and as such cannot say whether a local unit belongs to a large enterprise or a small enterprise. By contrast the SME statistics focus solely on enterprise data. As such it is able to accurately split employment by firm size at the national level but is not able to do so at the regional level as it is unable to allocate all employees to the regions in which their workplaces (local units) are based. The “UK Business Activity, Size and Location” publication, meanwhile, does provide both local unit and enterprise data, but does not provide employment data.

The aim of this working paper therefore is to work towards closing the gap between these data sources, by allocating employment in a region in terms of both enterprises and local units. In particular, this paper seeks to identify enterprises, in the same manner as the SME statistics, but then to add an additional step and identify the local units belonging to each enterprise such that the enterprises’ employment can be allocated according to the sites of the actual local units rather than just the location of the head office.

In other words, we use the enterprise data to allocate employment to the correct firm size category – but then additionally use local unit data to ensure that the enterprises employment is correctly distributed across the actual regional locations of its workplaces.

Appendix B: Methodology used to derive results in Section 1

The methodology used in deriving the results for Section 1 is as follows:

Step 1

The full IDBR sample for the UK covering all UK enterprises is split into one of three groups:

- Private sector firms are defined as those enterprises on the IDBR that are registered as a company, a sole proprietor, or a partnership.
- Public sector organisations are defined as those enterprises which are registered on the IDBR as a public corporation/nationalised industry, central government or a local authority.
- Non-Profit organisations are defined as those enterprises that are registered on the IDBR as being non-profit institutions serving households.

Steps 2-5 are then carried out for each of these three groups in turn, and the results in this report are presented according to the status split described above.

Step 2

For each grouping defined in step 1, an analysis of all the UK enterprise level data is carried out to identify the size of each UK enterprise. Each enterprise is allocated into one of four sub-groups depending on its UK size. Thus, enterprises employing at least 250 people in the UK are grouped together as 'large enterprises'; those employing 50-249 people in the UK are grouped together as 'medium-enterprises'; those employing 1-49 people in the UK are grouped together as 'small enterprises'; and those enterprises in the IDBR which have zero employment to their name are grouped together as '0 employee enterprises'.

The end result of step 2 for the private sector can be seen in Table 1a and shows the total sample of private sector UK enterprises split by firm size (and by the main industrial sector of the UK enterprise).

The four sub-groups identified in step 2 are from this point onwards treated as separate sample groups for analysis. Thus, steps 3,4 and 5 are first carried out to the 'large enterprise' sample, and then the process is repeated for the 'medium enterprise' sample etc. In other words, which enterprises are considered 'large' has been set in step 2 and will not be altered through the remainder of the process.

Step 3

For each enterprise size sub-group identified in Step 2, there now exists a list of all UK enterprises belonging to the size-band. Step 3 examines the local unit data related to each enterprise in order to determine for each enterprise whether or not it has any employment within Greater London.

Table 1b and 1c display the results of this process – showing the percentage share of all private sector UK enterprises which have local unit employment within London.

Note that the amount of employment that exists in London and indeed the sector of the employment within London is not considered at this stage. This step is simply to determine which of the enterprises from Table 1a have some local unit employment within London.

Thus, the size-band of the enterprises in Table 1b and 1c continues to refer to its overall UK level of private sector employment – whilst the sector designations continue at this stage to refer to the main industrial sector of the UK enterprise (whether or not its London employment is within the same sector). The key here is that Table 1b relates directly to Table 1a, thus allowing the percentage shares to be calculated in Table 1c.

Step 4

The end of step 3 has provided us with four new sub-groups of data to be carried forward for further analysis. These being a list of all large UK enterprises which have some employment in London; a list of all medium UK enterprises which have some employment in London etc.

Step 4 takes each of these sub-groups and examines in detail both the level of employment that each enterprise has in London and also the sector(s) of the economy in which the London employment is to be found. To do this all the London local unit data related to each of the enterprises in the sub-group is examined. Because each local unit in the IDBR has an associated level of employment and also an industrial SIC code classification then it is possible to group together all the local units that operate within a certain industrial sector and then add up the total employment across these local units.

The results of this analysis for the private sector are shown in Table 2.

To take an example, consider an enterprise that at the UK level has at least 250 employees. It has therefore been grouped as a 'large enterprise'. Examination of its local units has shown it has three local units in London. Two of these are in 'business services' and employ a total of 40 people between them; the third is in the sector of 'manufacturing' and employs 75 people. The contribution of this enterprise to the results in Table 2 will be 40 people allocated to the 'business services' row and the 'large enterprise' column; and 75 people allocated to the 'manufacturing' row and the 'large enterprise' column'.

In other words this example confirms the fact that in Table 2 it is the size of the enterprise at the UK level which determines into which column employment is allocated whilst it is the industrial sector of each local unit in London which determines into which row employment is allocated.

One point to note is that in Table 1, sectors were allocated according to the main industrial sector of the UK enterprise. In Table 2 employment is split by sector according to the industrial sector of each local unit. Thus data at a sector level in Table 2 is not directly comparable to data at the sector level in Table 1 so it is not possible, for example, to compare employment in large enterprises in retail in Table 2 with the number of large enterprises in retail in Table 1 to determine an employment/enterprise total for retail. Such a comparison can only be made for the 'total private sector' row in both Tables and not split by sector.

Appendix C: Methodology used to derive the results in Section 2

Step 1

The first step in the analysis for Section 2 was to obtain from the IDBR a list of all enterprises with some employment (in their local units) within London.

Step 2

For each enterprise, sum up all of its London employment across its local units and then split the enterprises into one of the following four groups based on the sum of their London employment.

- enterprises employing at least 250 people in London are grouped together as ‘large London employers’;
- enterprises employing 50-249 people in London are grouped together as ‘medium London employers’;
- enterprises employing 1-49 people in London are grouped together as ‘small London employers’;
- enterprises in the IDBR which have zero employment but are registered in London are grouped together as ‘0 employee enterprises’.

For each enterprise, the IDBR provides a ‘main London sector’ categorisation. In other words, for each enterprise the IDBR tells us in which sector the majority of an enterprise’s London employment is to be found. Data in Table 5 utilises this enterprise sector categorisation.

Step 3

For step 3 we stop considering sectors based on the ‘main London sector’ of the enterprise and instead investigate the sectors as defined in the IDBR for each local unit.

Therefore, we take the enterprise data in turn for each of the four size groups identified in step 2 and in each case we examine all of the local units belonging to the enterprises which have been allocated to that size band. Step 3 is simply to allocate the employment of each local unit to the appropriate industrial sector as given in the IDBR for the local unit. Table 6 summarises the results.

Note that in the same way as it was not possible to compare Tables 1 and 2 at the sector level, it is also not possible to compare Tables 5 and 6. This is because in Table 5 sectors are allocated according to the main industrial sector of each enterprise’s overall London employment whilst in Table 6 employment is split by sector according to the industrial sector of each local unit. Thus data at a sector level in Table 6 is not directly comparable to data at the sector level in Table 5 so it is not possible, for example, to compare employment in large London employers in retail in Table 6 with the number of large London employers in retail in Table 5 to determine an employment/enterprise total. Such a comparison can only be made for the ‘total private sector’ row in both Tables and not when split by sector.

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Chinese

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Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.