UK Competitiveness Index: 2026 Report



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Local and Regional Competitiveness in a Period of Global Uncertainty

November 2026

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Executive Summary

- The UK Competitiveness Index (UKCI), first published in 2000, benchmarks the competitiveness of the UK's localities using a 3-Factor model of inputs, outputs and outcomes. This 2026 edition, the thirteenth, covers 349 localities and compares their performance with 2022, a period marked by geopolitical uncertainty, trade disruption and cost-of-living pressures.
- The City of London remains by far the most competitive locality (UKCI 778.7), but since 2022 it has also experienced the largest fall in competitiveness relative to the UK average (−66.2 points). This may reflect concerns about its position as a global financial centre, with a number of UK-listed companies moving their listings elsewhere, particularly to the USA.
- Of the larger urban areas outside London, Edinburgh, with its financial specialism and government role, is the most competitive (UKCI 117.7), overtaking Milton Keynes, which led in 2022.
- Manchester's competitive position is improving (UKCI 113.3, ranked 31st), but the Greater Manchester Combined Authority as a whole ranks only fifth among combined authorities and city regions (UKCI 96.7), showing that competitiveness is unevenly distributed across the wider area.
- Belfast records the largest improvement among the core cities, rising from 96.7 to 100.1 to move just above the UK average, driven by increases in highly qualified residents and business registrations.
- The least competitive locality is Blaenau Gwent in Wales (UKCI 72.5), with a slight decrease in UKCI score since 2022; however, this should be set against a longer-run improvement relative to the UK average.
- Only 101 of the 349 localities covered have a UKCI score at or above the UK average of 100. This reflects the concentration of the most competitive localities in London and the South East, two regions that together account for 27.9 percent of the population of Great Britain.
- Localities experiencing larger improvements in UKCI score are generally more rural, although a number of localities in Inner London also fall into this group. Larger declines are generally found in more densely populated areas, including Outer London, traditionally more prosperous areas in the South East, and former industrial cities.
- As a positive sign for ambitions to 'rewire the state' and support broader growth and prosperity, there is some evidence of convergence. Since 2011 less competitive localities have tended to improve their UKCI scores faster than more competitive ones,

although the overall spread of scores has not narrowed to a statistically significant degree.

- Convergence is not occurring within all regions. London is pulling apart internally, with Inner London localities improving while many Outer London localities decline, and there is some evidence of divergence within London since 2019. Certain localities therefore risk being 'left behind' even in the most competitive regions.
- Many 'left behind places' continue to be urban areas that were previously reliant on heavy industry and have struggled to move to a more service-based economy or build on their remaining manufacturing strengths in the face of international competition and trade barriers, for example Kingston upon Hull (Yorkshire and the Humber) and Sunderland (North East).
- At the regional level there are three groups of competitiveness performance: (1) the leading regions of London (UKCI 114.9) and the South East (102.4) have seen slight falls in UKCI score; (2) regions in the middle of the distribution, such as the East of England, Scotland and the North West, have improved their competitiveness; and (3) most of the less competitive regions, including the East Midlands, Yorkshire and the Humber and Wales, have slipped slightly, although the North East, the least competitive region, has edged up.
- The West of England is the most competitive combined authority (UKCI 105.7), with a mix of service and manufacturing strengths.
- The least competitive combined authorities and city regions are Swansea Bay City Region (UKCI 83.1), Mid Wales (84.0), Tees Valley (84.6) and the North East (84.7). Mid Wales is one of the most rural areas considered, and Swansea Bay and the North East, although centred on cities, also have large rural areas, which makes economic planning and strategy more difficult.
- The weaknesses of these areas differ. The Welsh city regions lack knowledge-intensive enterprises (8.0 percent in Swansea Bay against a UK average of 22.7 percent), whereas the North East lags on higher-level skills. Without sufficient skilled labour the North East may struggle to retain its knowledge-based enterprises, while without suitable businesses the Welsh city regions may struggle to retain their skilled workers.
- Competitiveness is positively correlated with all three measures of foreign influence (the share of enterprises that are foreign-owned, and their shares of employment and turnover) and with each UKCI sub-index, whether or not Inner London is included. The analysis suggests that a broad base of smaller, more knowledge-intensive foreign-

owned firms matters more than a single large branch-plant employer. Causality is likely to run in both directions.

- When using the UKCI to predict future economic growth, it is London and the South East that are expected to grow most quickly in terms of GVA per capita. Seven of the ten fastest-growing localities in the long-run scenario are in London, led by Camden (7.71 percent per annum).
- Large gaps are predicted within city regions. In the Cardiff Capital Region, Monmouthshire is expected to have the fastest growth in GVA per capita in Wales (1.61 percent per annum), while Merthyr Tydfil faces the steepest decline (−0.90 percent).
- Other clusters of localities are predicted to have higher growth associated with improving living standards. These often include some of the more established combined authorities, but also some of the more rural areas around them, which may partly reflect the changing patterns of work since the COVID-19 pandemic, with greater working from home.

1. Introduction

The UK Competitiveness Index (UKCI) was first published in 2000; this report is the 2026 edition. The UKCI provides a benchmarking of the competitiveness of the UK's localities,[1] and it has been designed to be an integrated measure of competitiveness focusing on both the development and sustainability of businesses and the economic welfare of individuals. In this respect, competitiveness is considered to consist of the capability of an economy to attract and maintain firms with stable or rising market shares in an activity, while maintaining stable or increasing standards of living for those who participate in it.

The above definition makes clear that competitiveness is not a zero-sum game, and does not rely on the shifting of a finite amount of resources from one place to another. Competitiveness involves the upgrading and economic development of all places together, rather than the improvement of one place at the expense of another. However, competitiveness does involve balancing the different types of advantages that one place may hold over another, i.e. the range of differing strengths that the socio-economic environment affords to a particular place compared to elsewhere.

1.1. Period of Coverage

This report publishes competitiveness indices that incorporate the most up-to-date data available in 2026 (with not all data referring to this year due to lags in the release of certain indicators). As a recent historic comparator and measure of change, an index is also generated for 2022. All of the data used to calculate this UKCI for 2022 are drawn from 2022. As indicated, this provides a means of comparison and an examination of the UK's changing competitiveness landscape. Overall, this report seeks to provide a measure of the on-going competitiveness of localities across the UK and begins to analyse how they have continued to recover from the COVID-19 pandemic, but also emerging patterns relating to global uncertainty, particularly relating to energy price shocks caused by the Russian invasion of Ukraine in 2022 and more recent conflict in the Middle East. Section 5 provides a longer-term analysis of UKCI scores for 2011-2023.

[1] It should be noted that although the term 'UK' is used, due to a lack of compatible data, localities from Northern Ireland are largely excluded from the index.

Changes over time are considered to assess if prior policy has closed disparities in competitiveness across localities. This will allow the challenges faced by 'levelling up' and 'rewiring the state' policies to be considered. Data for 2011 to 2023 are examined so that consistent data from each year can be considered, with an analysis of convergence/divergence in competitiveness undertaken (see Appendix 1 for details of convergence analysis). We also use data starting in 2019 to look at a shorter period of time, and to consider what effect the COVID-19 pandemic and supply chain constraints had on the distribution of competitiveness.

1.2. Structure of Report

After outlining the methodology utilised in creating the UKCI, the key findings of the 2026 UKCI are analysed and outlined in the following sections. For those readers interested in the score and rank of a particular locality or localities they may wish to refer directly to Appendix 3, which provides a ranked order list of all localities, and/or Appendix 4, which ranks localities within their relevant regional grouping.

2. Methodology

This section outlines the theoretical perspective that is applied to the concept of competitiveness within the UKCI reports, and how this is used to generate a measure of competitiveness at the local level. The section, therefore, sets out the aims and objectives of the UKCI with regard to the perspective on competitiveness to be taken. This perspective is encapsulated within the UKCI 3-Factor model underpinning the index. The data included within the UKCI is noted while outlining the model before we describe how the data are brought together to produce an overall measure of competitiveness.

2.1. Aims and Objectives of the UKCI

The aim of the UKCI is to assess the relative economic competitiveness of regions and localities in Great Britain by constructing a single index that reflects, as fully as possible, the measurable criteria constituting place competitiveness. The UKCI considers the competitiveness of localities and the competitiveness of firms to be interdependent concepts. Measuring such competitiveness, however, is no easy matter and, as indicators of national competitiveness have shown, cannot be reduced solely to notions of Gross Domestic Product (GDP) and productivity.

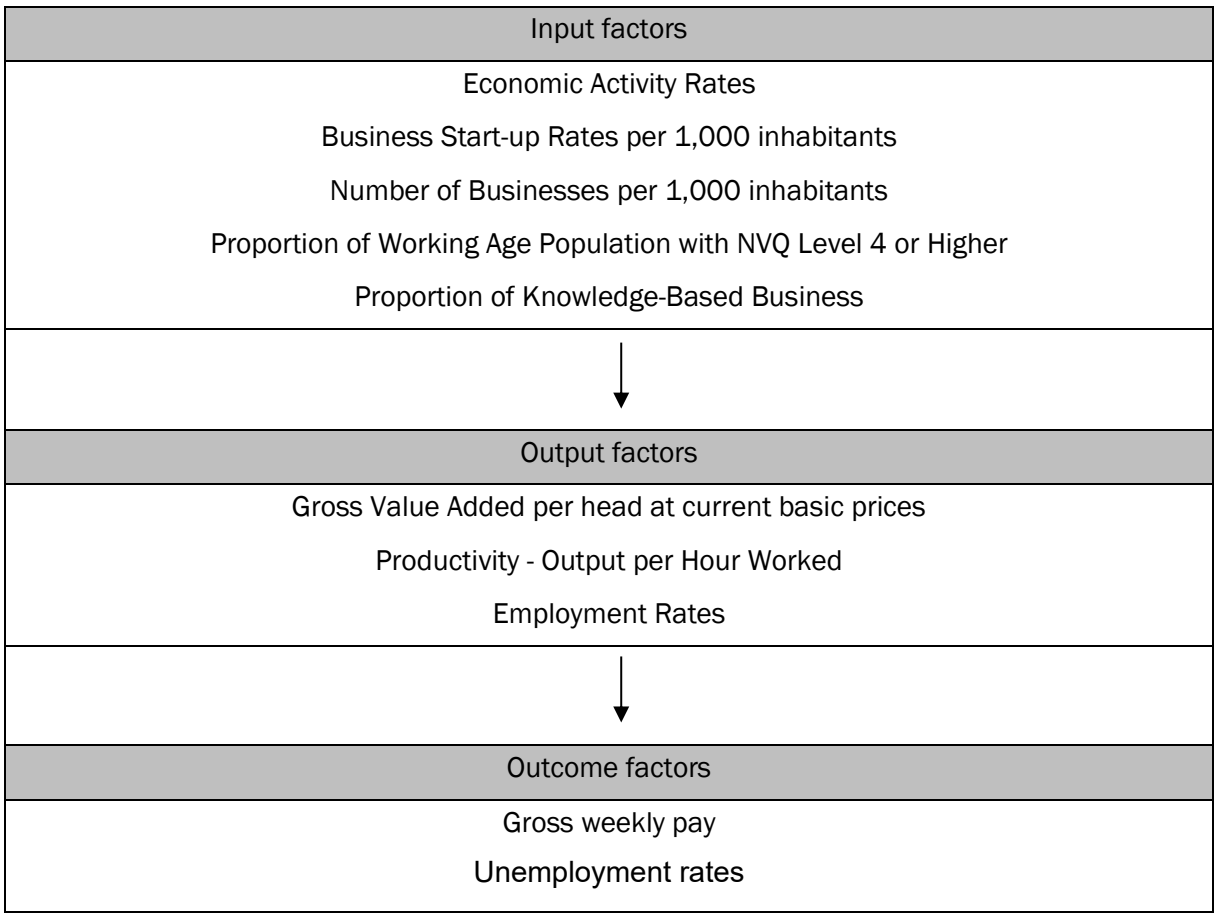
Similarly, place competitiveness cannot be measured by ranking any one variable in isolation, since it is the result of a complex interaction between input, output, and outcome factors. Clearly, not all of these factors are readily measurable, given that as well as consisting of economic variables, they also include political, social and cultural parameters. However, since the focus of the UKCI is on relative competitive performance within the UK, the assumption can be made that these factors will have an identifiable effect on key economic measures. For example, the cultural differences between a traditional manufacturing economy and a knowledge-based economy should have an obvious bearing on their relative economic performance.

The key concern with the design process of the UKCI is to develop a series of indices incorporating data that are available and comparable at the local level, and that go some way towards reflecting the link between macro-economic performance and innovative business behaviour. Consideration also has to be given to the overall 'value' of indicators, and their relative effectiveness as performance measures. In particular, the interrelationships between the 'measure-chain' of inputs, outputs and outcomes, and the underlying ability of the index to be updated as frequently as possible, are of major significance.

2.2. UKCI 3-Factor Model of Competitiveness

Given the methodological parameters, a number of different modes of creating the index, and the variables to be included, were considered. After testing, the 3-Factor model for measuring competitiveness as shown in Figure 2.01 is adopted. The 3-Factor model consists of a linear framework for analysing competitiveness based on: (1) input; (2) output; and (3) outcome factors.

FIGURE 2.01: THE 3 FACTOR MODEL UNDERLYING THE UK LOCAL COMPETITIVENESS INDEX



Source: Huggins, R. and Thompson, P. (2013) UK Competitiveness Index 2013, School of Planning and Geography, Cardiff University: Cardiff

In order to achieve a valid balance between each of the indicators, in terms of their overall significance to the composite index, each of the three measures - Measure 1: Inputs; Measure 2: Output; and Measure 3: Outcomes - is given an equal weighting, since it is hypothesised that each will be interrelated and economically bound by the other. [2]

[2] Huggins, R. (2003) 'Creating a UK Competitiveness Index: regional and local benchmarking', *Regional Studies*, 37 (1), 89-96.

2.3. Establishment of UKCI Scores

The index is produced by creating an index with a base of 100 for the UK average value for each indicator. To reduce the impact of outliers and skewness in the distribution of values for indicators an adjustment is made to generate a more normal distribution. Each indicator index is multiplied by 10,000 and the cube root taken to reduce the impact of outliers. The averages are then taken for all the adjusted indicators to generate the sub-index value. To reverse the compression caused by the outlier adjustment, the value is cubed and divided by 10,000 to produce the final sub-index values.

For the composite UKCI the sub-index values for all three sub-indices (Inputs, Outputs, and Outcomes) prior to the final adjustment are averaged. The adjustment is then applied to reverse the compression of values (cube the UKCI value and divide by 10,000).

Section 10 also provides a set of scenario forecasts of growth in GVA per capita using the UKCI. This approach is covered in detail in Appendix 2, but effectively is based on previous patterns of growth experienced by localities with particular UKCI sub-index scores, and uses this to predict which localities will experience growth in the future given their current UKCI sub-index scores. As is appropriate for the uncertain times we live in, four scenarios are presented, each based on a past period, reflecting how the national and global economy might respond to the uncertainty created by various conflicts around the world, their impact on global trade, and the resulting cost-of-living pressures.

2.4. Geographical Coverage

The UKCI 2026 covers the localities in England, Scotland and Wales at the local authority district level. The areas covered are a mix of English local authority districts, English and Welsh unitary authorities, Scottish Council Areas, and London Boroughs. The areas covered are those in operation in April 2023.

Due to local government reorganisation in recent years the localities considered are therefore not the same as in the UKCI 2023 or earlier reports. Since the UKCI 2023 report, which used the local authority districts present in April 2021, a number of two-tier local authority areas (areas covered by a local authority district council and a geographically larger county council) have been combined into larger unitary authorities. In the North West of England: Barrow-in-Furness, Eden and South Lakeland have been combined to form Westmorland and Furness; and Allerdale, Carlisle, and Copeland have been combined to form Cumberland.

In Yorkshire and the Humber the unitary authority of North Yorkshire has been created from Craven, Hambleton, Harrogate, Richmondshire, Ryedale, Scarborough, and Selby, although York remains its own unitary authority area. The final reorganisation is in the South West of England where Mendip, Sedgemoor, Somerset West and Taunton, and South Somerset have been combined to form Somerset. It should be noted that Somerset does not cover the whole of the ceremonial county of Somerset with Bath and North East Somerset and North Somerset remaining separate unitary authorities.

As such, when making comparisons readers should use the rankings provided in this report for 2022 where an equivalent UKCI has been estimated using the same areas that came into operation in 2023. Any comparison of rankings in editions prior to this will in part reflect the dissolution of some localities so may provide an inaccurate picture.

UKCI 2026 figures are estimated for all local authority district level areas with the exception of the Isles of Scilly where unfortunately data availability issues make it impossible to provide a reliable figure for this geographically very small local authority district with a small population.

The 2023 local authority district areas are also used in the convergence analysis in Section 5. UKCI scores for earlier years are retrospectively estimated for these local authority district areas. This is necessary so that like for like comparisons are made.

As well as producing UKCI figures for individual localities, the report includes data for the English Local Enterprise Partnerships (LEPs) and City Regions in Wales and Scotland that already have City Deals in place and can be easily geographically identified. This means that Isles of Scilly is covered within the larger Cornwall and the Isles of Scilly LEP area to which it belongs. Some of the Scottish City Deals cannot be included as they not only overlap one another, but also do not align completely or nearly completely with the local authority district areas. The latter makes it impossible to generate some of the indicators covered in the UKCI (see sub-section 2.2) accurately. In particular, the Tay Cities Region overlaps the Edinburgh and South East Scotland City Region and also incorporates a portion of the Fife Scottish Council District area.

As with the locality measures, care should be taken when making comparisons with figures in previous UKCI reports. This is because there have been some major revisions to the LEP areas in England. The LEP areas considered are again consistent with those in the 2021 and 2023 editions, but not those in previous editions. Changes that took place prior to the 2021 edition relate to removal of many of the overlaps between LEP areas, so that in the main the localities only lie within a single LEP. The remaining exceptions are in the West Midlands.

With the Labour Government's devolution agenda an increasing number of combined authorities have been created in England. UKCI data are now generated for those combined authorities in existence in 2026. As the roles of LEPs have been gradually subsumed into many of these combined authorities it is expected that combined authorities will replace the LEPs in future editions for these larger sub-regional comparisons with city regions in Scotland and Wales.

3. The Most and Least Competitive Localities

This section of the report concentrates on the 'extremes' of the rankings of the UKCI for 2026 by focusing on those localities that display the highest and lowest levels of competitiveness.

3.1. The Most Competitive Localities

As has been the case in previous years the top ten most competitive localities according to the UKCI are concentrated in London (Table 3.01). A slight change from some previous reports is that Runnymede, the only non-London locality previously found in the top ten, is now joined by Mole Valley. Nevertheless, this continues a pattern of the most competitive localities being located in London or in close proximity with good transportation links to London.

Although by far the most competitive locality in the UK, the City of London has followed a similar pattern to that found in more recent UKCI reports of a declining UKCI score. This may be reflective of concerns that the City of London is struggling to remain as a key global financial centre, with a number of UK listed companies changing their listings to alternatives, in particular those in the USA, although it has been noted that this is likely to be a relatively slow process.[3]

Between 2022 and 2026 the locality that drops out of the top ten most competitive localities is Southwark in London. This is just a drop of a single position to 11th in 2026, so does not reflect a major change in competitiveness patterns.

TABLE 3.01: UKCI 2026 TOP 10 LOCALITIES (UK=100)

Rank 2026	Locality	Region	UKCI 2026	UKCI 2022	Rank 2022	Change 2022-2026 UKCI	Change 2022-2026 Rank
1	City of London	London	778.7	844.9	1	-66.2	0
2	Westminster	London	234.6	229.0	2	5.6	0
3	Camden	London	184.2	178.3	3	5.9	0
4	Islington	London	162.2	159.1	4	3.1	0
5	Tower Hamlets	London	153.8	150.5	5	3.3	0
6	Hackney	London	136.2	133.1	6	3.1	0
7	Hammersmith and Fulham	London	131.7	130.9	9	0.8	+2
8	Kensington and Chelsea	London	129.5	131.4	8	-1.9	0
9	Runnymede	South East	128.0	131.4	7	-3.5	-2
10	Mole Valley	South East	126.9	117.2	21	9.7	+11

[3] Iliopoulos, P. (T.), Ioannou, S. and Wójcik, D. (2024) 'The City of London after Brexit: sticky power in the Global Financial Network', *Progress in Economic Geography*, 2, 100011. doi:10.1016/j.peg.2024.100011

3.2. The Least Competitive Localities

The ten least competitive localities based on the UKCI in 2026 are more varied in their regional location than the most competitive localities (Table 3.02). However, many of the localities have a shared history of being based around heavier large-scale industry. These industries' role in providing employment diminished rapidly in the second half of the twentieth century, and in many cases ceased to operate completely in the first quarter of the twenty first century if it had not done so already. Examples come from a number of regions, including: Rhondda Cynon Taf, Merthyr Tydfil and Blaenau Gwent in the South Wales Valleys; Redcar and Cleveland, Hartlepool, and South Tyneside in the North East.

Other localities with slightly different social and economic histories include more rural areas, such as the Lincolnshire localities of East Lindsey and Boston (East Midlands). There is also Torbay in the South West, which has traditionally relied on tourism and hospitality, but like many UK seaside resorts has struggled to match the offer of international alternatives with flights much cheaper in real terms and lower labour costs.[4] As will be returned to in Section 4, Inverclyde neighbouring the City of Glasgow in Scotland falls in the rankings to drop into the 10 least competitive localities.

TABLE 3.02: UKCI 2026 BOTTOM 10 LOCALITIES (UK=100)

			UKCI			Change 2022-2026	
Rank 2026	Locality	Region	2026	2022	Rank 2022	UKCI	Rank
340	Torbay	South West	78.1	78.5	339	-0.3	-1
341	Rhondda Cynon Taf	Wales	77.8	78.7	338	-0.9	-3
342	East Lindsey	East Midlands	77.4	75.4	347	2.1	+5
343	Redcar and Cleveland	North East	77.3	76.7	343	0.6	0
344	Inverclyde	Scotland	77.0	80.7	324	-3.7	-20
345	Boston	East Midlands	76.8	77.7	341	-0.9	-4
346	Hartlepool	North East	75.7	77.2	342	-1.5	-4
347	Merthyr Tydfil	Wales	75.1	73.6	348	1.5	+1
348	South Tyneside	North East	74.6	75.5	346	-0.9	-2
349	Blaenau Gwent	Wales	72.5	72.9	349	-0.4	0

[4] House of Lords (2019) *The Future of Seaside Towns*, London: Select Committee on Regenerating Seaside Towns and Communities.

3.3. Geographical Distribution of Competitiveness in Britain

In the preceding two sub-sections we noted that although higher levels of competitiveness tend to be concentrated in London and to a lesser degree the South East, there are less competitive localities in a larger range of regions. This section highlights the extent that less competitive localities can be found in geographically diverse locations in Great Britain. Figure 3.01 below helps to illustrate this by presenting the competitiveness of localities across Great Britain.

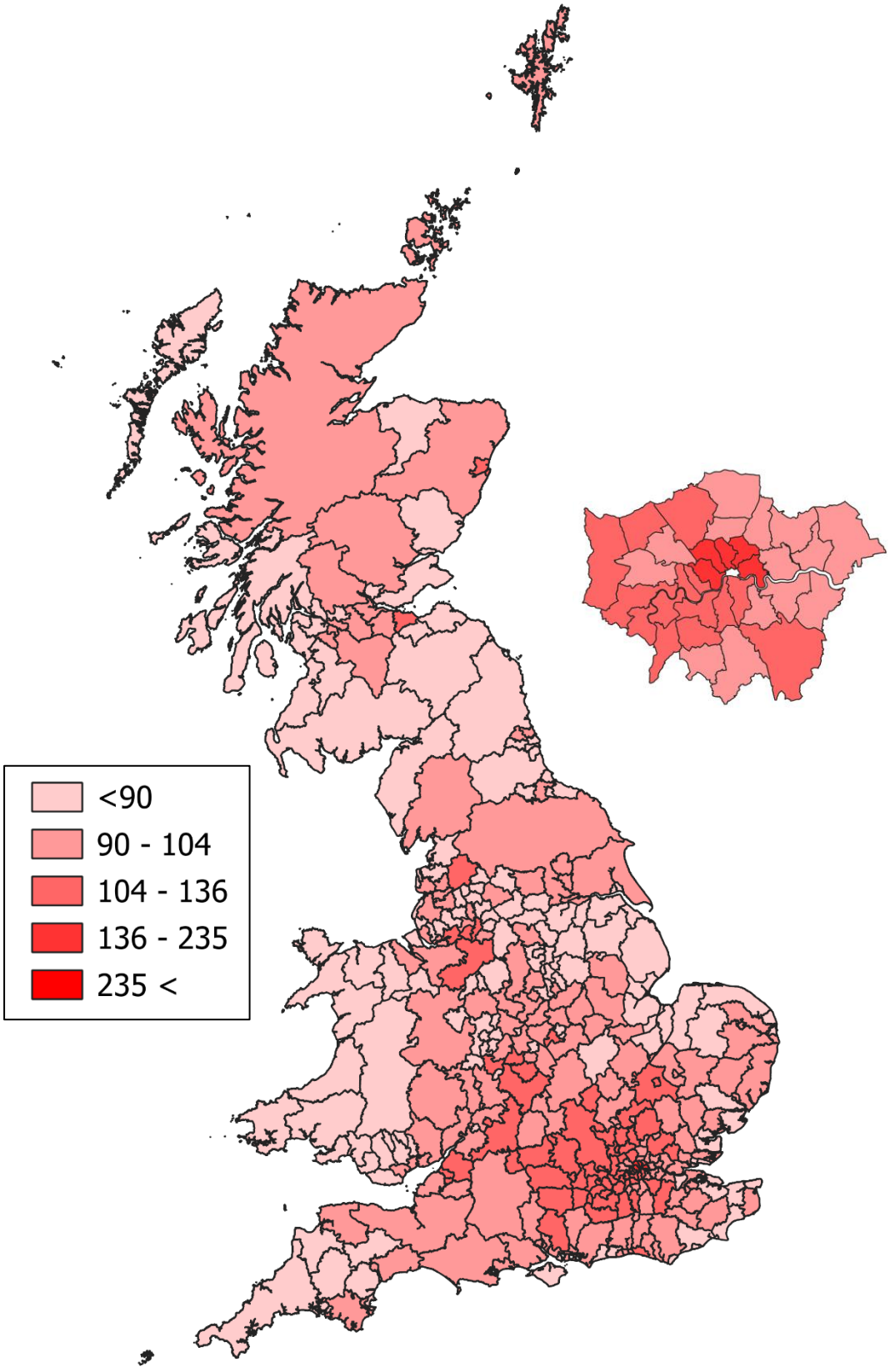
What is immediately apparent is that a majority of localities have a lower level of competitiveness than the UK average. As indicated in Appendix 3, only 101 of 349 localities covered have a UKCI score at or above the value of 100 that represents the UK average. This is reflective of the dominance of the London and South East regions that are home to a disproportionate number of more competitive localities, but also relatively densely populated. As a result, the two regions, London (9.123 million) and the South East (9.692 million) account for 27.9 percent of the population of Great Britain (67.555 million) in 2025.

Although there is a clear pattern of higher competitiveness in those areas surrounding London, particularly stretching along the M4 corridor and northwards towards the knowledge centre of Cambridge, there are also less competitive localities in the South East. These include areas in close proximity to London, such as those in Kent, including Swale (UKCI 86.3 ranked 254) and Canterbury (UKCI 89.1 ranked 221). There are also the seaside resorts on the South Coast such as Eastbourne (UKCI 81.1 ranked 319) and Hastings (UKCI 82.8 ranked 300). All are well below the average for the UK of 100.

Similarly, although more peripheral localities in Scotland and Wales are less competitive there are also more competitive localities. The cities of Edinburgh, with its capital city function and financial sector (UKCI 117.7 ranked 20); Aberdeen, with its oil industry (UKCI 107.1 ranked 55); and Cardiff, also with a relatively large financial sector and capital city function (UKCI 100.0 ranked 101); outperform the majority of other localities in their regions.

Other clusters of more competitive localities can be identified around Manchester (UKCI 113.3 ranked 31) and those localities to its south such as Cheshire East (UKCI 106.1 ranked 65), and in the West Midlands stretching down from just south of Birmingham, for example, Bromsgrove (UKCI 106.5 ranked 62), and continuing south west across the regional boundary to Bristol itself (106.4 ranked 63).

FIGURE 3.01: GEOGRAPHICAL DISTRIBUTION OF COMPETITIVENESS IN 2026 (UK UKCI = 100)



4. Biggest Climbers and Fallers

In the UKCI 2023 report the disruption caused by the COVID-19 pandemic led to some changes in UKCI rankings that were larger than had been typical in previous years. This reflected the extreme government restrictions that were imposed, which 'closed' some sectors that individual localities had relied on for many years for their success. As these restrictions affected some sectors to a greater extent than others this led to an uneven pattern of change.

All restrictions for COVID-19 that affected everyday social and working life have been removed. Although this led to a rapid recovery for many local economies, there were lasting impacts on patterns of social and economic behaviour that are still apparent. The most evident example of this has been the adoption of more technology to allow working from home,[5] which has affected major city centres with footfall and spending still below the levels experienced in 2019 prior to the COVID-19 pandemic.[6]

The lifting of restrictions, followed by conflicts firstly in Ukraine and then in the Middle East, has led to rapid increases in inflation due to supply chain bottlenecks and then rapidly rising energy costs, leading to a cost-of-living crisis.[7] As with the COVID-19 pandemic the impact of this cost-of-living crisis has not fallen evenly,[8] with the likely impact being that consumer confidence will be reduced to a greater extent in some areas. Add in the impact of Donald Trump's various tariff/trade wars affecting different sectors to greater or lesser extents,[9] and the relatively stable conditions experienced after the Great Recession up to 2019 are yet to return.

[5] According to the ONS Public Opinions and Social Trends data for 1st to 26th July 2026 (https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/datasets/publicopinionsandsocialtrendsgreatbritainworkingarrangements) 12 percent of respondents in the UK work at home all of the time, and a further 29 percent some of the time. This compares to estimates of around 5 percent usually working from home in 2019 (ONS, 2020 Coronavirus and homeworking in the UK labour market: 2019, Newport, ONS. https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/coronavirusandhomeworkingintheuklabourmarket/2019)

[6] Centre for Cities (2025) *The Impact of Hybrid Working on the High Street*, Birmingham, Centre for Cities.

[7] Francis-Devine, B. (2026) *High Cost of Living: Impact on Households*, Research Briefing CBP-10100, London: House of Commons Library.

[8] Rodrigues, G. and Quinio, V. (2022) *Out of Pocket: The Places at the Sharp End of the Cost of Living Crisis*, Birmingham: Centre for Cities.

[9] Kaya, A. I. (2024) *Implications of Higher US Tariffs for the UK Economy*, London: National Institute of Economic and Social Research; Saussay, A. (2024) *The Economic Impacts of Trump's Tariff Proposals on Europe*, London: Grantham Research Institute on Climate Change and the Environment.

This means that although no single shock of the magnitude of the COVID-19 period is captured by the changes in the scores for UKCI between 2022 and 2026, the geopolitical uncertainty experienced over this period is still likely to have lasting impacts with some localities affected to a greater degree than others. This section will examine which localities have experienced the largest climbs in competitiveness as captured by the UKCI, and which the greatest falls.

All of these changes, it should be noted, are in comparison to the UK average. Therefore, they are not necessarily seeing 'absolute' improvements or falls in the individual indicators that make up the UKCI, but are 'relatively' more or less competitive when compared to the UK average (100). This means these localities are likely to be better or worse placed to retain and attract key resources such as labour,[10] and investment.[11] As noted in Section 2, this is not a 'winner takes all' scenario, but is likely to leave some localities gaining or falling behind in relative terms with regard to maintenance and improvement of the living standards of residents.[12]

4.1. Biggest Climbers 2022 to 2026

When considering those displaying the greatest improvements in competitiveness there is a need to take care as to whether this is considered in terms of ranking or UKCI score. As was shown in Section 3 there are more localities with competitiveness levels below the UK average than above it. This reflects the skewed nature of the distribution with a smaller number of localities having much higher levels of competitiveness, and a majority having lower levels. This means that a moderate change in UKCI score can result in a relatively large change in ranking for these less competitive localities.

Given the geopolitical uncertainty and lasting impact of the COVID-19 pandemic, it is not surprising that there are more changes in UKCI score than in pre-pandemic editions of the UKCI reports. Table 4.01 presents the eleven localities with the largest positive change in rankings between 2022 and 2026. As predicted all the localities listed are those with levels of competitiveness below the UK average (UKCI = 100).

[10] Martin, R. and Gardiner, B. (2019) 'The resilience of cities to economic shocks: a tale of four recessions (and the challenge of Brexit)', *Papers in Regional Science*, 98 (4), 1801-1832.

[11] Cui, L. Fan, D. Li, Y. and Choi, Y. (2020) 'Regional competitiveness for attracting and retaining foreign direct investment: a configurational analysis of Chinese provinces', *Regional Studies*, 54 (5), 692-703.

[12] Huggins, R. and Thompson, P. (2017) 'Introducing regional competitiveness and development', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 1-31.

Many of the localities in Table 4.01 are relatively more rural, such as Mid Devon (South West) and Herefordshire (West Midlands). At least in the short run these localities which rely to a greater extent on agriculture and domestic tourism and are less exposed (although not immune) to cost effects and international trade impacts have experienced relative improvements compared to the UK average.

TABLE 4.01: UKCI TOP 11 RANKING CLIMBERS (UK=100)

Rank 2026	Locality	Region	UKCI 2026	UKCI 2022	Rank 2022	Change 2022-2026 UKCI	Change 2022-2026 Rank
227	Mid Devon	South West	88.6	84.1	287	4.5	+60
164	Lewes	South East	93.4	88.8	222	4.6	+58
184	Chorley	North West	91.9	87.4	242	4.5	+58
197	Havant	South East	90.7	86.9	252	3.8	+55
180	Adur	South East	92.1	87.9	234	4.3	+54
283	Thanet	South East	83.8	80.2	334	3.7	+51
107	Chichester	South East	99.3	94.6	152	4.7	+45
178	Herefordshire, County of	West Midlands	92.3	88.8	223	3.5	+45
193	North Lanarkshire	Scotland	91.0	87.6	238	3.4	+45
160	Hinckley and Bosworth	East Midlands	93.9	89.9	203	4.0	+43
278	Pendle	North West	84.1	81.2	321	2.9	+43

When considering the largest changes in UKCI score between 2022 and 2026 (Table 4.02) there is a degree of overlap with some of those localities experiencing the greatest rankings changes, such as Chichester and Lewes (both in the South East). However, the top three localities in terms of improving UKCI score are drawn from the ten most competitive localities (Mole Valley, Camden and Westminster). These localities saw smaller or even no changes in ranking given the greater dispersion of UKCI scores for the most competitive localities. This helps to illustrate that there is neither a simple story of the most competitive localities pulling away from the least competitive, nor evidence of levelling up taking place, a topic considered in more detail in Section 5.

As well as the most competitive localities from London and the South East, and the more rural areas of England, there are also relatively large improvements in competitiveness from towns and smaller cities across the regions, such as Lewes and Chichester (South East) and Chorley and Cheshire West and Chester (North West).

TABLE 4.02: UKCI TOP 10 CHANGES IN UKCI SCORE (UK=100)

Rank 2026	Locality	Region	UKCI 2026	UKCI 2022	Rank 2022	Change 2022-2026 UKCI	Change 2022-2026 Rank
10	Mole Valley	South East	126.9	117.2	21	9.7	+11
3	Camden	London	184.2	178.3	3	5.9	0
2	Westminster	London	234.6	229.0	2	5.6	0
107	Chichester	South East	99.3	94.6	152	4.7	+45
164	Lewes	South East	93.4	88.8	222	4.6	+58
227	Mid Devon	South West	88.6	84.1	287	4.5	+60
184	Chorley	North West	91.9	87.4	242	4.5	+58
180	Adur	South East	92.1	87.9	234	4.3	+54
82	Cheshire West and Chester	North West	102.6	98.4	123	4.2	+41
147	West Suffolk	East of England	95.2	90.9	187	4.2	+40

4.2. Biggest Fallers 2022 to 2026

Turning to those localities that display patterns of diminishing competitiveness, the ten localities with the greatest falls in UKCI ranking between 2022 and 2026 (Table 4.03) all had competitiveness levels below the UK average in 2022. A number of these localities host, or are economic centres near to, maritime or other international transport functions. These include Folkestone and Hythe (South East), Ipswich (East of England) and North Lincolnshire (Yorkshire and the Humber). The latter of these is also the location of Scunthorpe Steel Works that has recently been taken under national control due to the threat of closure from its Chinese owner. It is possible that disruptions to international trade of various types have affected these localities.

We noted in sub-section 3.2 that Inverclyde (Scotland) had dropped into the bottom ten least competitive localities and is worthy of a mention. The fall between 2022 and 2026 largely relates to declining economic activity and employment rates. This exemplifies how many of the old industrial areas in Great Britain that have lost large employers they relied on in the twentieth century (and sometimes the nineteenth century) are now highly sensitive to the loss of those businesses that remain. As covered in Section 9, this can often include foreign-owned enterprises, such as Amazon and IBM, as has been the case for Inverclyde.[13]

TABLE 4.03: UKCI 10 LARGEST RANKING FALLERS (UK=100)

			UKCI			Change 2022-2026	
Rank 2026	Locality	Region	2026	2022	Rank 2022	UKCI	Rank
326	Wigan	North West	80.6	83.3	290	-2.8	-36
308	Gedling	East Midlands	82.1	85.2	269	-3.2	-39
304	Newcastle-under-Lyme	West Midlands	82.6	85.5	262	-2.9	-42
228	Folkestone and Hythe	South East	88.6	91.0	184	-2.5	-44
319	Eastbourne	South East	81.1	85.1	272	-4.0	-47
235	South Staffordshire	West Midlands	88.3	91.6	182	-3.3	-53
222	North Lincolnshire	Yorkshire and the Humber	89.1	93.4	165	-4.2	-57
182	Ipswich	East of England	92.0	98.8	116	-6.8	-66
272	South Holland	East Midlands	84.6	89.8	204	-5.2	-68
248	Gravesham	South East	86.9	91.8	178	-4.9	-70

[13] https://www.inverclyde.gov.uk/news/2026/may/appeal-to-first-minister-over-jobs-crisis

When considered in terms of the largest falls in UKCI score, the locality experiencing the largest decline in competitiveness between 2022 and 2026 is the City of London (Table 4.04). Although the City of London maintains by far the highest UKCI score, it has declined by 66.2 points, while the next largest decline is for Ipswich (6.8 points). This combined story of remaining by far the most competitive locality while also seeing a decline in its position relative to the UK average is consistent with Brexit to a degree diminishing London's position as a financial centre in Europe, and a reduced ability to compete with the ever-growing liquidity pools in the US.

Other notable localities with declines in UKCI scores over the period are the Oxfordshire areas of Oxford itself and the Vale of White Horse. In the case of Oxford, the cause of decline is not one particular source but rather smaller declines in all input indicators (knowledge-intensive businesses, skilled labour, business registrations, business population, and economic activity).

TABLE 4.04: UKCI 10 LARGEST DECLINES IN UKCI SCORE (UK=100)

			UKCI			Change 2022-2026	
Rank 2026	Locality	Region	2026	2022	Rank 2022	UKCI	Rank
319	Eastbourne	South East	81.1	85.1	272	-4.0	-47
66	Oxford	South East	105.8	109.9	46	-4.1	-20
150	South Derbyshire	East Midlands	95.0	99.1	115	-4.1	-35
56	Vale of White Horse	South East	106.9	111.1	36	-4.2	-20
222	North Lincolnshire	Yorkshire and the Humber	89.1	93.4	165	-4.2	-57
136	Newham	London	96.2	101.1	101	-4.9	-35
248	Gravesham	South East	86.9	91.8	178	-4.9	-70
272	South Holland	East Midlands	84.6	89.8	204	-5.2	-68
182	Ipswich	East of England	92.0	98.8	116	-6.8	-66
1	City of London	London	778.7	844.9	1	-66.2	0

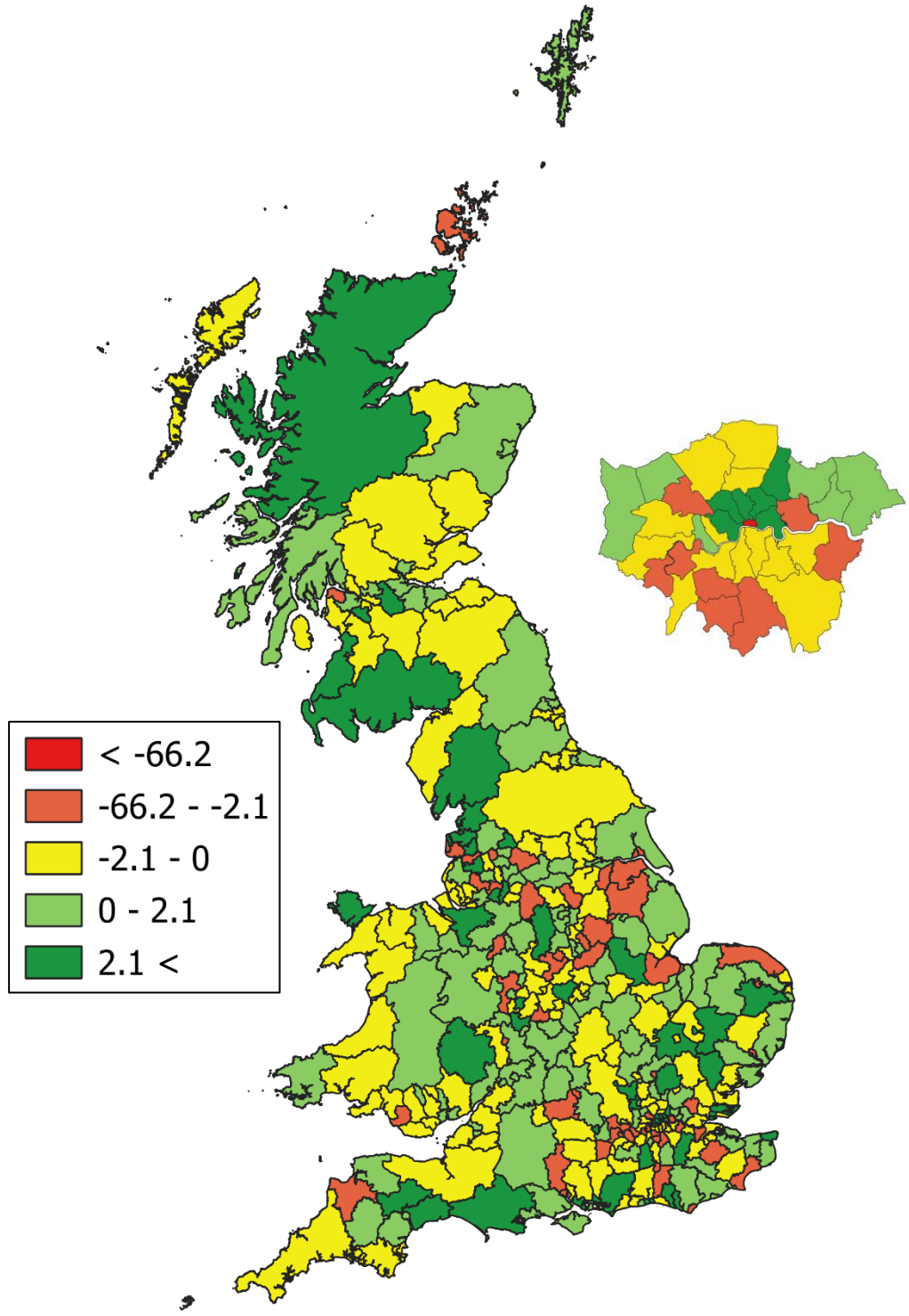
4.3. Geographical Distribution of Competitiveness Changes

As discussed in Sections 4.1 and 4.2 above, localities of quite different natures are experiencing increases and decreases in competitiveness in the 2022 to 2026 period. Figure 4.01 below confirms this with the darker green areas indicating improvements in competitiveness and those in reds and oranges indicating declines in competitiveness.

As was evident in sub-section 4.1, many of the localities improving their competitiveness are more rural in nature. They are spread across the whole of Great Britain, with larger improvements in competitiveness found in areas as geographically dispersed as Highland in Scotland to East Devon in the South West, and most regions between (for example the Isle of Anglesey in Wales and South Kesteven in the East Midlands).

Those localities with declining UKCI are also found across Great Britain with both more urban localities in Outer London heavily represented, and areas as remote as the Orkney Islands in Scotland and rural areas such as Torridge in the South West. However, it does appear that it is the more densely populated areas that are more likely to be in this group as will be considered in more depth in sub-section 6.2.

FIGURE 4.01: GEOGRAPHICAL DISTRIBUTION OF LOCAL AUTHORITIES DISPLAYING LARGER INCREASES AND DECREASES IN UKCI BETWEEN 2022 AND 2026



5. Competitiveness and Rewiring the State

At the time of the publication of the UKCI 2023 report, the UK had a Conservative Government that had previously outlined a 'levelling up' agenda to reduce the geographical inequalities across the economy.[14] The report sought to examine whether there had been any evidence of the competitiveness of localities diverging or converging prior to the COVID-19 pandemic. The presence of economic divergences has been noted to have considerable consequences not just for the well-being of residents of less competitive localities, but also in the direction that political support has taken. This has been captured in the work on the geography of discontent that has observed the increased support for populist and more extreme political movements in recent years as the prevailing capitalist paradigm has been perceived to have left many places and groups behind.[15]

The UK now has a Labour Government with Andy Burnham as the current Prime Minister; however, the same concerns and desires to reduce inequalities are evident. As will be discussed in greater detail in Section 8 when the competitiveness of combined authorities is considered in more detail, the desire to devolve powers away from Whitehall in London is seen as a key lever to achieve this.[16]

In this section we not only consider the convergence or divergence over a longer period, but also more recent changes before and after the COVID-19 pandemic. Sub-section 5.1 starts by presenting a descriptive analysis of the variation of competitiveness across localities and within regions over time. Sub-section 5.2 then considers if there are changes in the spread of competitiveness over time. Sub-section 5.3 employs a technique known as beta convergence to ascertain if less competitive localities are increasing their competitiveness to a greater degree than more competitive localities. Details of how these measures of convergence are calculated are provided in Appendix 1.

[14] HM Government (2022) *Levelling Up: Levelling Up the United Kingdom*, London: HMSO (CP 604).

[15] Dijkstra, L. Poelman, H. and Rodríguez-Pose, A. (2020) 'The geography of EU discontent', *Regional Studies*, 54 (6), 737-753.

Lenzi, C. and Perucca, G. (2021) 'People or places that don't matter? Individual and contextual determinants of the geography of discontent', *Economic Geography*, 97 (5), 415-445.

McKay, L. Jennings, W. and Stoker, G. (2024) 'Understanding the geography of discontent: perceptions of government's biases against left-behind places', *Journal of European Public Policy*, 31 (6), 1719-1748.

[16] The Cabinet (2026) *Rewiring the State: Statement from the Cabinet*, 31 July, London: HM Government. https://assets.publishing.service.gov.uk/media/6a6c7acf0ddb7e4831c62abd/REWIRING_THE_STATE_-_CABINET_STATEMENT.pdf

5.1. Disparities in Local Competitiveness 2011 to 2023

This sub-section starts by considering the statistical distribution of competitiveness over time. This is illustrated in Table 5.01 which considers how the expected level of competitiveness for localities has changed (the mean average level of competitiveness), the range of competitiveness identified (using the highest and lowest values of competitiveness) and the degree that the competitiveness scores are clustered around the average value or more spread out (standard deviation of competitiveness).[17] In the analysis we exclude the outlying localities of the City of London and Westminster as changes in their competitiveness are likely to overly influence the whole analysis while only representing a relatively small proportion of localities.

As was found in the UKCI 2023 report, there is a continued pattern of decreasing average UKCI score over time from 96.0 in 2011 to 95.1 in 2023. The average locality score differs from the UK value (UKCI = 100) because the latter accounts for the population sizes of the localities, while the former does not.

There continues to be an interesting pattern of UKCI scores improving at both extremes of the distribution, so that positively the UKCI score for the worst performing locality is moving closer to the UK value over time, while the best performing locality (excepting the atypical localities of City of London and Westminster) is also improving its UKCI score. This means that although the worst performing locality is improving its position relative to the UK average, there is still an increase in dispersion of UKCI scores captured by the range between the best and worst performing (99.7 in 2011 and 107.7 in 2023). However, it should be noted that the range is only affected by the extreme values, the standard deviation measure captures deviations from the average for all localities and shows the opposite pattern with this falling from 14.5 in 2011 to only 13.4 in 2023.

With regard to disparities in competitiveness within Great Britain, these figures can be viewed in a positive light although, as the work on the geography of discontent has shown, such improvements have not necessarily been of sufficient speed or magnitude to meet all the population's needs. However, it also raises the question as to whether particular localities that were traditionally more competitive are losing their strengths.

[17] Please note that as the focus in this section is on the disparities between localities no weighting of localities is undertaken based on the populations of different localities. In effect the unit of analysis is focused on the local authority area - the locality, as a whole - rather than the expected experience of individual residents in groups of localities. This means that the average competitiveness will not necessarily be equal to 100.

TABLE 5.01: DESCRIPTIVE STATISTICS FOR UKCI FOR PERIODS COVERING 2011 TO 2023

	Mean Average	Standard Deviation	Minimum	Maximum	Range
2011	96.0	14.5	66.8	166.5	99.7
2013	95.8	14.4	67.7	164.0	96.3
2015	95.6	14.5	68.7	172.4	103.7
2017	95.2	14.5	70.3	176.8	106.5
2019	95.3	14.3	71.5	172.8	101.3
2021	95.2	13.5	71.3	172.8	101.4
2023	95.1	13.4	74.0	181.7	107.7

Table 5.02 below presents the descriptive statistics for localities in each region of England along with the devolved nations of Wales and Scotland separately. Although Section 7 considers regional competitiveness in more depth, there is evidence of more competitive localities in London and the South East falling back towards the UK average, while the South West, already below the UK average, falls further behind. The opposite pattern is found for the West Midlands with improving average competitiveness.

In terms of distribution within regions, a greater number of regions have a pattern of falling standard deviation, and in some cases the coefficient of variation. These include the East Midlands, Scotland, South East, South West, Wales, West Midlands and Yorkshire and the Humber. This would imply that even if localities in individual regions are not moving towards the UK average, they do seem to be clustering more tightly around the regional averages, which is investigated more deeply in sub-section 5.2.

Most regions experience an increase in the UKCI score of their least competitive locality over time, although the opposite is the case for London, the North East, the North West and Scotland. Although this is only looking at the extreme least competitive locality in each region, it is promising that in most regions those localities left behind to the greatest extent are closing the gap with their neighbours.

TABLE 5.02: DESCRIPTIVE STATISTICS FOR UKCI FOR PERIODS COVERING 2011 TO 2023 FOR INDIVIDUAL REGIONS

East Midlands	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	89.9	7.7	0.09	73.3	106.3	33.0
2013	89.7	7.4	0.08	73.5	106.7	33.2
2015	89.6	7.7	0.09	76.4	106.7	30.3
2017	88.2	7.5	0.08	73.0	102.8	29.8
2019	88.9	7.6	0.09	75.4	106.1	30.7
2021	89.4	6.9	0.08	71.3	104.2	32.9
2023	89.0	6.9	0.08	76.2	102.7	26.5

East of England	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	97.6	11.2	0.11	73.8	120.8	47.0
2013	97.7	11.3	0.12	75.5	119.6	44.1
2015	97.1	11.5	0.12	75.3	121.8	46.5
2017	97.3	12.3	0.13	75.0	124.2	49.2
2019	97.2	12.3	0.13	76.2	125.8	49.5
2021	96.9	11.1	0.11	76.5	125.7	49.2
2023	97.0	11.6	0.12	75.5	127.6	52.1

London	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	114.4	19.6	0.17	92.2	166.5	74.3
2013	115.1	19.2	0.17	94.4	164.0	69.6
2015	116.2	20.3	0.17	96.1	172.4	76.3
2017	115.0	20.3	0.18	91.5	176.8	85.4
2019	114.3	19.5	0.17	89.2	172.8	83.6
2021	114.8	19.5	0.17	90.2	172.8	82.6
2023	112.3	21.4	0.19	88.8	181.7	92.9

North East	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	84.4	5.9	0.07	75.5	94.0	18.5
2013	84.5	5.0	0.06	77.9	93.7	15.9
2015	85.6	5.6	0.07	79.0	96.2	17.3
2017	84.2	5.6	0.07	77.3	93.3	16.0
2019	83.2	5.8	0.07	75.0	92.7	17.7
2021	84.1	5.7	0.07	76.8	92.4	15.6
2023	84.0	6.0	0.07	74.6	94.5	19.9

TABLE 5.02: CONTINUED

North West	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	90.2	10.3	0.11	76.5	113.2	36.7
2013	90.0	9.7	0.11	76.6	111.1	34.5
2015	90.0	9.7	0.11	76.7	111.4	34.7
2017	91.0	10.2	0.11	77.1	113.8	36.7
2019	90.4	10.0	0.11	79.3	109.2	29.9
2021	90.3	9.5	0.10	78.3	109.5	31.3
2023	90.9	10.2	0.11	75.8	112.3	36.5

Scotland	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	91.4	9.6	0.10	79.9	123.6	43.7
2013	91.6	9.6	0.10	80.3	123.2	42.9
2015	91.3	9.0	0.10	80.5	117.9	37.4
2017	90.6	8.0	0.09	81.4	115.6	34.2
2019	90.2	7.7	0.09	80.3	114.2	33.9
2021	89.7	7.2	0.08	80.0	112.6	32.6
2023	90.8	7.9	0.09	77.4	117.5	40.1

South East	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	105.8	14.2	0.13	77.7	132.8	55.1
2013	104.5	14.6	0.14	74.4	137.7	63.3
2015	104.0	14.1	0.14	75.7	130.5	54.8
2017	103.2	13.9	0.13	78.1	133.8	55.7
2019	104.0	13.9	0.13	77.0	134.2	57.2
2021	102.2	12.8	0.13	74.2	130.9	56.7
2023	102.3	12.3	0.12	79.6	131.4	51.7

South West	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	95.2	9.8	0.10	76.6	114.9	38.3
2013	94.4	9.1	0.10	78.4	110.8	32.3
2015	94.1	9.7	0.10	76.6	110.5	33.9
2017	93.4	10.1	0.11	76.7	112.0	35.3
2019	93.0	9.6	0.10	76.7	110.1	33.4
2021	93.0	9.3	0.10	76.2	110.0	33.8
2023	93.7	8.7	0.09	77.7	111.4	33.7

TABLE 5.02: CONTINUED

Wales	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	83.2	7.2	0.09	66.8	97.9	31.1
2013	83.6	6.8	0.08	67.7	98.3	30.6
2015	83.1	6.6	0.08	68.7	98.0	29.3
2017	83.6	6.8	0.08	70.3	98.4	28.1
2019	83.8	6.6	0.08	71.5	98.8	27.4
2021	84.8	6.7	0.08	72.3	101.1	28.7
2023	84.6	6.2	0.07	74.0	99.1	25.0

West Midlands	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	91.1	9.7	0.11	78.7	112.4	33.8
2013	91.5	10.3	0.11	78.3	115.2	36.9
2015	91.4	10.5	0.12	79.4	119.9	40.5
2017	91.7	12.1	0.13	77.3	122.2	44.9
2019	92.7	11.1	0.12	79.2	125.2	46.0
2021	93.2	9.0	0.10	81.0	113.1	32.1
2023	92.4	8.9	0.10	80.8	112.9	32.0

Yorkshire and the Humber	Mean Average	Standard Deviation	Coefficient of Variation	Minimum	Maximum	Range
2011	87.0	7.3	0.08	78.5	100.8	22.3
2013	87.0	7.1	0.08	78.2	100.3	22.0
2015	87.1	6.5	0.07	79.7	100.4	20.7
2017	86.5	6.6	0.08	77.9	99.3	21.4
2019	87.0	6.6	0.08	79.6	99.5	19.8
2021	87.1	6.3	0.07	79.7	99.8	20.1
2023	88.3	6.8	0.08	79.9	102.2	22.3

5.2. Sigma Convergence/Divergence of Local Competitiveness 2011 to 2023

The data in sub-section 5.1 indicate that disparities in competitiveness across Great Britain may be continuing to fall as time passes. Some of this appears to be driven by the localities in the most competitive regions falling back towards the UK average, with less evidence of localities in less competitive regions closing on the UK average. Within regions there are also different patterns. The figures tend to show reduced dispersion in UKCI scores within most regions, but the opposite pattern is the case in London. This section provides a more robust check of these patterns by drawing on the concept of sigma convergence to test for differences in dispersion over time.

Table 5.03 presents the F-tests when considering the British localities as a whole. As the standard deviation did not fall or rise consistently over the period, we compare all possible combinations of periods. The figure in the brackets reflects the probability of observing a difference at least this large if the dispersion were in fact unchanged. Any value of 0.05 or less is traditionally regarded as statistically significant, indicating that any difference of this size would happen at random less than 1 in 20 times.

None of the tests indicate a statistically significant value. When a value in the 0.05 to 0.10 range is found it is typically considered to provide 'weak evidence' of the pattern being tested for, and this is the case for the comparisons of 2021 and 2023 with a number of the earlier periods. Therefore, under this measure there is no hard evidence of convergence or divergence in the competitiveness of British localities, but some suggestion that if current patterns continue evidence may emerge in future years. If this is the case it might explain the finding in the geography of discontent literature that any improvements are happening too slowly for some in the population.

TABLE 5.03: TESTS OF SIGMA CONVERGENCE/DIVERGENCE (TESTS OF DIFFERENCES IN STANDARD DEVIATION)

	2011	2013	2015	2017	2019	2021
2013	1.021 (0.423)					
2015	1.001 (0.497)	0.980 (0.574)				
2017	1.001 (0.495)	0.981 (0.572)	1.001 (0.498)			
2019	1.032 (0.386)	1.011 (0.461)	1.031 (0.388)	1.030 (0.390)		
2021	1.153 (0.093)	1.129 (0.130)	1.152 (0.094)	1.151 (0.095)	1.117 (0.151)	
2023	1.168 (0.075)	1.144 (0.106)	1.167 (0.076)	1.166 (0.076)	1.132 (0.125)	1.013 (0.452)

Notes: F-statistic of differences in standard deviation; p-values in parentheses

Tables 5.04 to 5.08 repeat the sigma tests for different periods of comparison for localities in each region separately. The smaller number of localities within each individual region means that the differences in dispersion must be much larger to be statistically significant in these tests. As such it is no surprise that even when making comparisons of the dispersion of UKCI scores in the first period (2011) with those in the later periods 2019 (In Table 5.04 to cover the pre-COVID-19 period) and 2023 (In Table 5.05 the longest period available) there are no significant results.

Table 5.04: Tests of Sigma Convergence/Divergence (Tests of Difference in Standard Deviation) for Individual Regions (comparison of 2011 and 2019)

	F-statistic	p-value
East Midlands	1.041	(0.454)
East of England	0.825	(0.737)
London	1.011	(0.489)
North East	1.009	(0.494)
North West	1.071	(0.422)
Scotland	1.529	(0.122)
South East	1.047	(0.428)
South West	1.038	(0.463)
Wales	1.189	(0.348)
West Midlands	0.766	(0.761)
Yorkshire and the Humber	1.211	(0.363)

Table 5.05: Tests of Sigma Convergence/Divergence (Tests of Difference in Standard Deviation) for Individual Regions (comparison of 2011 and 2023)

	F-statistic	p-value
East Midlands	1.241	(0.266)
East of England	0.931	(0.594)
London	0.844	(0.678)
North East	0.961	(0.526)
North West	1.019	(0.479)
Scotland	1.455	(0.151)
South East	1.334	(0.128)
South West	1.268	(0.278)
Wales	1.375	(0.236)
West Midlands	1.211	(0.305)
Yorkshire and the Humber	1.147	(0.400)

Tables 5.06 to 5.08 examine shorter more recent potential changes. This is to ascertain if the shocks associated with the COVID-19 pandemic and the uncertain period afterwards have led to statistically significant changes. Tables 5.06 and 5.07 indicate that there is no significant change in dispersion of UKCI scores for localities within any single region between the pre-Covid-19 period of 2019 and either during the COVID-19 restrictions (Table 5.06, 2021) or the period of global uncertainty afterwards (Table 5.07, 2023).

Table 5.06: Tests of Sigma Convergence/Divergence (Tests of Difference in Standard Deviation) for Individual Regions (comparison of 2019 and 2021)

	F-statistic	p-value
East Midlands	1.194	(0.304)
East of England	1.225	(0.252)
London	1.004	(0.496)
North East	1.048	(0.470)
North West	1.109	(0.383)
Scotland	1.145	(0.355)
South East	1.170	(0.267)
South West	1.051	(0.451)
Wales	0.985	(0.513)
West Midlands	1.516	(0.134)
Yorkshire and the Humber	1.097	(0.433)

Table 5.07: Tests of Sigma Convergence/Divergence (Tests of Difference in Standard Deviation) for Individual Regions (comparison of 2019 and 2023)

	F-statistic	p-value
East Midlands	1.192	(0.306)
East of England	1.128	(0.346)
London	0.835	(0.688)
North East	0.952	(0.532)
North West	0.952	(0.557)
Scotland	0.952	(0.554)
South East	1.274	(0.170)
South West	1.222	(0.310)
Wales	1.156	(0.371)
West Midlands	1.581	(0.112)
Yorkshire and the Humber	0.948	(0.539)

Table 5.08 considers if there is a change from the COVID-19 period in 2021 and the period of global uncertainty afterwards (2023). This period is worth considering as there was both a rapid recovery and then further shocks experienced within a very short period of time. Again, there is no evidence of changes in dispersion of UKCI scores for any of the individual regions.

TABLE 5.08: TESTS OF SIGMA CONVERGENCE/DIVERGENCE (TESTS OF DIFFERENCE IN STANDARD DEVIATION) FOR INDIVIDUAL REGIONS (COMPARISON OF 2021 AND 2023)

	F-statistic	p-value
East Midlands	0.999	(0.502)
East of England	0.920	(0.608)
London	0.832	(0.691)
North East	0.908	(0.562)
North West	0.858	(0.671)
Scotland	0.832	(0.694)
South East	1.088	(0.369)
South West	1.162	(0.355)
Wales	1.174	(0.359)
West Midlands	1.043	(0.455)
Yorkshire and the Humber	0.864	(0.606)

5.3. Beta Convergence/Divergence of Local Competitiveness

The test for sigma convergence found no evidence that the spread of competitiveness scores was significantly increasing or decreasing through time, but this does not mean that localities with lower levels of competitiveness are not improving their UKCI scores more or less than those with higher levels of competitiveness. Hypothetically, it is possible for the standard deviation values to remain exactly the same, because less competitive localities improve their competitiveness to such an extent that they replace the most competitive, whereas the most competitive fall back and replace the least competitive. This indicates the potential for sigma convergence not to be present but at the same time the situation is improving for the least competitive localities.

In this sub-section beta convergence is used to understand if less competitive localities are catching up with their more competitive counterparts. The analysis tests whether or not those localities with the lowest (highest) UKCI scores at the beginning of the time period considered experienced greater (lesser) improvements in the UKCI score. A negative value will indicate beta convergence whereas a positive value represents beta divergence, i.e. the less competitive localities are being left further behind over time. To account for other factors, we also control for the influence of the rural or urban nature of the locality and the region it is located. Unfortunately, it is not possible to control for both at the same time as localities in London are all classed as being part of a major agglomeration.

As with sigma convergence we repeat the analysis from the UKCI 2023 report that considered beta convergence prior to the COVID-19 pandemic, but using the latest locality configurations. However, we also consider if there is evidence of convergence over the longest available time (from 2011 to 2023), and whether there is convergence/divergence when just considering the period since immediately before the COVID-19 shock until different points such as the depths of COVID restrictions (2021) and until entering the period of global geopolitical uncertainty (2023).

Table 5.09 shows that with the latest definition of the local authority district areas there remains evidence of beta convergence for the period before the COVID-19 pandemic. The coefficient on the UKCI score in 2011 is negative and significant whichever controls are included. This means the higher the value of UKCI score in 2011 the smaller the change in UKCI score between 2011 and 2019, so that the less competitive localities catch up with the localities which at the start of the period were more competitive.

TABLE 5.09: BETA CONVERGENCE/DIVERGENCE TESTS (2011-2019)

	Model 1	Model 2	Model 3
UKCI 2011	**-0.0497 (0.000)**	**-0.0638 (0.000)**	**-0.0547 (0.002)**
Urban or Rural Nature (base category - Significant Rural)			
Major Urban		1.2262 (0.055)	
Large Urban		0.3254 (0.650)	
Other Urban		-0.2474 (0.691)	
Rural-50		**-1.8530 (0.006)**	
Rural-80		**-2.2014 (0.002)**	
Region (base category - South East)			
East Midlands			0.0482 (0.953)
East of England			1.0561 (0.146)
London			**2.1969 (0.007)**
North East			-0.5160 (0.669)
North West			1.1500 (0.158)
Scotland			-0.0665 (0.936)
South West			-0.8999 (0.301)
Wales			1.2133 (0.218)
West Midlands			**2.6197 (0.002)**
Yorkshire and the Humber			0.7812 (0.476)
Constant	4.1455 (0.002)	5.8390 (0.000)	3.9274 (0.036)
N	347	347	347
F-test p-value	12.89 (0.0004)	8.33 (0.000)	3.59 (0.000)
R^2	0.036	0.128	0.105

Notes: p-values in parentheses

Table 5.10 presents the results when testing for beta convergence in the pre-COVID-19 period for the localities in each individual region. When no other controls are included (Model 1), only Scotland displays beta convergence that is significant at the 5 percent level. However, after controlling for the rurality of localities (Model 2), significant negative coefficients are found for the South East and Wales as well as Scotland. All three of these regions were noted as displaying improving competitiveness for the least competitive localities and for Wales and the South East falling standard deviations.

TABLE 5.10: BETA CONVERGENCE/DIVERGENCE TESTS FOR REGIONS (2011-2019)

	Model 1	Model 2
East Midlands	-0.1267 (0.111)	-0.1185 (0.111)
East of England	0.0406 (0.463)	0.0241 (0.714)
London	-0.0345 (0.444)	n/a
North East	-0.0735 (0.537)	-0.1765 (0.111)
North West	-0.0832 (0.127)	-0.0507 (0.340)
Scotland	**-0.2326** **(0.000)**	**-0.2506** **(0.000)**
South East	-0.0649 (0.076)	**-0.0799** **(0.031)**
South West	-0.0402 (0.345)	-0.0633 (0.186)
Wales	-0.1297 (0.058)	**-0.1744** **(0.015)**
West Midlands	0.0316 (0.736)	0.0446 (0.691)
Yorkshire and the Humber	-0.1289 (0.096)	-0.1199 (0.170)
Control for Urban or Rural Nature	No	Yes

Notes: p-values in parentheses

Tables 5.11 and 5.12 repeat the tests, but consider the period up to 2021 and 2023 respectively. Including the years after the start of the COVID-19 pandemic does not change the results. Higher levels of competitiveness in 2011 remain negatively associated with the change in UKCI score in the years that follow.

TABLE 5.11: BETA CONVERGENCE/DIVERGENCE TESTS (2011-2021)

	Model 1	Model 2	Model 3
UKCI 2011	**-0.1119 (0.000)**	**-0.1309 (0.000)**	**-0.1236 (0.000)**
Urban or Rural Nature (base category - Significant Rural)			
Major Urban		**2.7278 (0.000)**	
Large Urban		0.8555 (0.268)	
Other Urban		0.4902 (0.464)	
Rural-50		-1.4080 (0.051)	
Rural-80		-1.4581 (0.058)	
Region (base category - South East)			
East Midlands			1.2064 (0.158)
East of England			**1.9315 (0.011)**
London			**5.0369 (0.000)**
North East			0.6216 (0.622)
North West			**1.7529 (0.040)**
Scotland			0.1261 (0.884)
South West			0.1339 (0.883)
Wales			**2.4881 (0.016)**
West Midlands			**3.9199 (0.000)**
Yorkshire and the Humber			1.3972 (0.223)
Constant	9.9331 (0.000)	11.4084 (0.000)	9.4561 (0.000)
N	347	347	347
F-test p-value	54.9 (0.000)	18.1 (0.000)	11.0 (0.000)
R^2	0.137	0.242	0.265

Notes: p-values in parentheses

TABLE 5.12: BETA CONVERGENCE/DIVERGENCE TESTS (2011-2023)

	Model 1	Model 2	Model 3
UKCI 2011	**-0.1245 (0.000)**	**-0.1340 (0.000)**	**-0.1103 (0.000)**
Urban or Rural Nature (base category - Significant Rural)			
Major Urban		**1.7162 (0.025)**	
Large Urban		1.5120 (0.079)	
Other Urban		0.4357 (0.559)	
Rural-50		-0.5257 (0.512)	
Rural-80		-0.8354 (0.328)	
Region (base category - South East)			
East Midlands			0.9169 (0.339)
East of England			**2.0284 (0.018)**
London			**2.3855 (0.013)**
North East			0.7000 (0.621)
North West			**2.5022 (0.009)**
Scotland			1.3803 (0.157)
South West			0.8114 (0.427)
Wales			**2.4874 (0.032)**
West Midlands			**3.2183 (0.001)**
Yorkshire and the Humber			**2.7337 (0.034)**
Constant	11.0962 (0.000)	11.5669 (0.000)	8.1478 (0.000)
N	347	347	347
F-test p-value	59.6 (0.000)	12.9 (0.000)	7.4 (0.000)
R^2	0.147	0.185	0.195

Notes: p-values in parentheses

Including the years after the start of the COVID-19 pandemic in the analysis of localities by region does lead to a change in results. Whereas only Scotland displayed a statistically significant result in Table 5.10 when no other controls are included, when using the period up to 2021 (Table 5.13) and 2023 (Table 5.14) other regions produce significant results. In fact, it is only the East of England, London, North East and Yorkshire and the Humber that do not produce a significant result in at least one test over these longer periods.

All the coefficients estimated are negative suggesting that this pattern of beta convergence is geographically widespread. It is not just a case of localities in less competitive regions catching up with those in more competitive regions, as might be the case with the results for Great Britain, but there is evidence of less competitive localities catching up with the more competitive localities in their own regions. This is positive, but as noted earlier it may not be occurring sufficiently fast as far as the populations of less competitive localities are concerned given the long-standing economic divisions present.

TABLE 5.13: BETA CONVERGENCE/DIVERGENCE TESTS FOR REGIONS (2011-2021)

	Model 1	Model 2
East Midlands	**-0.2034** **(0.008)**	**-0.1810** **(0.014)**
East of England	-0.0557 (0.248)	-0.0848 (0.130)
London	-0.0573 (0.331)	n/a
North East	-0.0704 (0.454)	-0.1358 (0.136)
North West	**-0.1640** **(0.018)**	-0.1105 (0.112)
Scotland	**-0.3021** **(0.000)**	**-0.3194** **(0.000)**
South East	**-0.1472** **(0.000)**	**-0.1579** **(0.000)**
South West	-0.0783 (0.151)	**-0.1288** **(0.021)**
Wales	-0.1182 (0.070)	**-0.1785** **(0.015)**
West Midlands	**-0.1360** **(0.042)**	**-0.1632** **(0.032)**
Yorkshire and the Humber	-0.2871 (0.057)	-0.2239 (0.173)
Control for Urban or Rural Nature	No	Yes

Notes: p-values in parentheses

TABLE 5.14: BETA CONVERGENCE/DIVERGENCE TESTS FOR REGIONS (2011-2023)

	Model 1	Model 2
East Midlands	**-0.1662** **(0.007)**	**-0.1495** **(0.019)**
East of England	-0.0409 (0.500)	-0.0470 (0.517)
London	-0.0014 (0.987)	n/a
North East	-0.0338 (0.751)	-0.0662 (0.618)
North West	-0.0766 (0.229)	-0.0572 (0.372)
Scotland	**-0.2576** **(0.001)**	**-0.2870** **(0.000)**
South East	**-0.1857** **(0.000)**	**-0.1938** **(0.000)**
South West	**-0.1654** **(0.013)**	**-0.2418** **(0.001)**
Wales	**-0.2411** **(0.012)**	**-0.3032** **(0.010)**
West Midlands	**-0.1226** **(0.010)**	-0.0794 (0.153)
Yorkshire and the Humber	-0.0993 (0.169)	-0.1036 (0.177)
Control for Urban or Rural Nature	No	Yes

Notes: p-values in parentheses

We now turn to concentrate just on the changes that have occurred since the start of the COVID-19 pandemic. Tables 5.15 (2019 to 2021) and 5.16 (2019 to 2023) test for beta convergence in Great Britain. Once again, it is consistently found that those localities which had higher UKCI scores at the start of the period (2019) have less positive changes in competitiveness in the period that followed. On this basis, the COVID-19 pandemic did not alter the pattern of convergence and this might be consistent with the COVID-19 pandemic disturbing established patterns of economic activity, such as increased working from home and greater use of technology hurting urban areas, but allowing more rural areas to connect more strongly.[18]

[18] Lee, K. (2023) 'Working from home as an economic and social change: a review', *Labour Economics*, 85, 102462. doi: 10.1016/j.labeco.2023.102462

TABLE 5.15: BETA CONVERGENCE/DIVERGENCE TESTS (2019-2021)

	Model 1	Model 2	Model 3
UKCI 2019	**-0.0755 (0.000)**	**-0.0842 (0.000)**	**-0.0917 (0.000)**
Urban or Rural Nature (base category - Significant Rural)			
Major Urban		**1.6724 (0.001)**	
Large Urban		0.5088 (0.372)	
Other Urban		0.6576 (0.184)	
Rural-50		0.2582 (0.628)	
Rural-80		0.5092 (0.371)	
Region (base category - South East)			
East Midlands			0.8775 (0.157)
East of England			0.8245 (0.135)
London			**3.1944 (0.000)**
North East			0.7079 (0.442)
North West			0.4299 (0.484)
Scotland			-0.0717 (0.910)
South West			0.7613 (0.253)
Wales			0.9813 (0.185)
West Midlands			**1.2774 (0.045)**
Yorkshire and the Humber			0.3514 (0.673)
Constant	7.0209 (0.000)	7.2039 (0.000)	7.7774 (0.000)
N	347	347	347
F-test p-value	48.7 (0.000)	10.4 (0.000)	7.5 (0.000)
R^2	0.124	0.155	0.198

Notes: p-values in parentheses

TABLE 5.16: BETA CONVERGENCE/DIVERGENCE TESTS (2019-2023)

	Model 1	Model 2	Model 3
UKCI 2019	**-0.0846** **(0.000)**	**-0.0804** **(0.000)**	**-0.0697** **(0.000)**
Urban or Rural Nature (base category - Significant Rural)			
Major Urban		0.6179 (0.256)	
Large Urban		1.1916 (0.051)	
Other Urban		0.6375 (0.229)	
Rural-50		**1.1650** **(0.042)**	
Rural-80		1.1679 (0.056)	
Region (base category - South East)			
East Midlands			0.7074 (0.298)
East of England			0.9606 (0.112)
London			0.4302 (0.530)
North East			0.9592 (0.341)
North West			1.2716 (0.059)
Scotland			1.2930 (0.062)
South West			**1.5388** **(0.035)**
Wales			1.1249 (0.166)
West Midlands			0.6293 (0.366)
Yorkshire and the Humber			**1.8128** **(0.047)**
Constant	7.8411 (0.000)	6.6929 (0.000)	5.5852 (0.000)
N	347	347	347
F-test p-value	54.3 (0.000)	10.2 (0.000)	5.7 (0.000)
R^2	0.136	0.152	0.157

Notes: p-values in parentheses

At a regional level, it is interesting that Scotland and Wales are two regions that displayed more evidence of beta convergence prior to the COVID-19 pandemic but are among those that have less consistent evidence of beta convergence in the later period.

TABLE 5.17: BETA CONVERGENCE/DIVERGENCE TESTS FOR REGIONS (2019-2021)

	Model 1	Model 2
East Midlands	-0.0766 (0.241)	-0.0625 (0.274)
East of England	**-0.1165** **(0.000)**	**-0.1404** **(0.000)**
London	-0.0107 (0.667)	n/a
North East	-0.0464 (0.505)	0.0199 (0.794)
North West	-0.0938 (0.067)	-0.0734 (0.182)
Scotland	**-0.1011** **(0.039)**	-0.1005 (0.070)
South East	**-0.0925** **(0.000)**	**-0.0873** **(0.001)**
South West	-0.0372 (0.255)	**-0.0729** **(0.043)**
Wales	-0.0233 (0.678)	-0.0413 (0.558)
West Midlands	**-0.3104** **(0.001)**	**-0.3678** **(0.001)**
Yorkshire and the Humber	-0.1294 (0.256)	-0.0753 (0.523)
Control for Urban or Rural Nature	No	Yes

Notes: p-values in parentheses

TABLE 5.18: BETA CONVERGENCE/DIVERGENCE TESTS FOR REGIONS (2019-2023)

	Model 1	Model 2
East Midlands	**-0.1751** **(0.016)**	-0.1378 (0.065)
East of England	**-0.0907** **(0.020)**	-0.0934 (0.063)
London	0.0713 (0.098)	n/a
North East	-0.0298 (0.781)	0.1019 (0.475)
North West	-0.0003 (0.994)	-0.0147 (0.736)
Scotland	-0.0296 (0.626)	-0.0458 (0.464)
South East	**-0.1358** **(0.000)**	**-0.1302** **(0.000)**
South West	**-0.1230** **(0.012)**	**-0.1866** **(0.001)**
Wales	-0.1263 (0.092)	-0.1336 (0.161)
West Midlands	**-0.2554** **(0.000)**	**-0.2395** **(0.001)**
Yorkshire and the Humber	0.0158 (0.717)	0.0031 (0.936)
Control for Urban or Rural Nature	No	Yes

Notes: p-values in parentheses

For the period 2019 to 2023 (Table 5.18), most regional coefficients remain negative, with beta convergence significant at the 5 percent level in Model 1 for the East Midlands, East of England, South East, South West and West Midlands. London is the exception: its coefficient is positive (0.0713) and significant at the 10 percent level, providing weak evidence of divergence among London localities, consistent with Inner London localities improving their UKCI scores while many Outer London localities decline. The coefficients for Yorkshire and the Humber, and for the North East when controlling for rurality, are also positive, although not statistically significant.

5.4. Convergence Trends: A Summary

The analysis presented in this section highlights that whether there is evidence for less competitive localities catching up with more competitive ones differs depending on the measure of convergence used. Although it appears that localities' competitiveness is becoming less dispersed over time, the statistical tests of sigma convergence cannot prove this to be anything more than a random pattern in the data. On the other hand, when looking at the change in competitiveness for localities this is found to be significantly related to the starting UKCI score, with less competitive localities on average improving their UKCI scores in the subsequent period by a greater amount than those which were more competitive (beta convergence).

At the regional level, most of the coefficients estimated are negative, as would be associated with beta convergence, although the results are not statistically significant for all regions. The pattern of regions that produce significant results also changes depending on the time period considered, pre or post COVID-19 pandemic.

It is positive that little evidence of divergence in competitiveness is found, the exception being weak evidence of divergence among London localities between 2019 and 2023 (Table 5.18). However, the speed and consistency of convergence mean that there are still considerable differences in UKCI score across Great Britain, which is consistent with the work on the geography of discontent.

6. A City Perspective

Included within the localities covered by the UKCI are those that cover the cities of Great Britain. This section focuses on those localities in order to allow a closer comparison of similarly urbanised areas. There are also comparisons of the average competitiveness of larger urban areas with that found for the more rural areas (sub-section 6.2). This analysis provides insight into the patterns of convergence found in Section 5 above by examining whether rural localities have seen a stronger performance than in previous years, as suggested in sub-section 4.3. In the UKCI 2023 report a change away from the largest urban areas' greater competitiveness towards more rural localities was noted, but it was questioned as to whether this pattern was temporary or a more lasting change in the way of working and living.[19] Sub-section 6.3 concentrates on the largest cities within the UK, which in previous years have been transforming from their historical strengths towards service-oriented economies.

6.1. Cities in Great Britain

Table 6.01 outlines the UKCI scores and rankings for the larger urban areas classified as cities.[20] We only consider larger urban areas in terms of population (100,000) within this comparison and we also exclude London which is considered to be a 'region', so the areas in focus are more similar.[21]

[19] Florida, R. Rodríguez-Pose, A. and Storper, M. (2023) 'Critical commentary: cities in a post-COVID world', *Urban Studies*, 60 (8), 1509-1531.
Wolff, M. and Mykhnenko, V. (2023) 'COVID-19 as a game-changer? The impact of the pandemic on urban trajectories', *Cities*, 134, 104162. Doi: 10.1016/j.cities.2022.104162

[20] The designation of city was taken from the UK Government's list of cities https://www.gov.uk/government/publications/list-of-cities/list-of-cities-html. This means that some new cities formed relatively recently as part of the Platinum Jubilee celebrations have been included such as Doncaster and those such as Southend-on-Sea given the designation in honour of Sir David Amess are included.

[21] In contrast to previous editions of the UKCI before 2023, the qualifying criterion of population of 100,000 has changed a little. Previously the definition was based on the population of the local authority district with a focus on those localities specifically associated with a city. The current definition uses the built-up area population where available with these being distinguished by the following: "A 'bricks and mortar' approach, with built-up areas defined as land with a minimum area of 20 hectares (200,000 m2), while settlements within 200 metres of each other are linked." (https://www.nomisweb.co.uk/), or alternatively the large town or city definition from NOMIS if this is not available. This means that some cities previously included such as St Albans, Winchester and Lichfield are no longer included as they have populations less than 100,000 under these definitions with less connected areas in the local authority district area making up the remainder of the population. It also means some cities such as Bath (and North East Somerset) are included as the built up area of Bath meets the criterion.

In 2026 the most competitive city under this definition is the City of Edinburgh with its well-developed financial sector. It swaps positions with Milton Keynes from the South East, which held the top position in 2022. Whereas the UKCI for the City of Edinburgh has improved from 115.7 in 2022 to 117.7 in 2026, Milton Keynes has seen a decline from 115.8 to 113.8 over the same time period. The source of this change is associated with the City of Edinburgh's ability to convert inputs into output (UKCI Outputs Index improved from 134.2 to 138.1) and then outcomes for its population (UKCI Outcomes Index improved from 101.9 to 105.0). Milton Keynes actually has a slightly stronger UKCI Inputs Index in 2026 (112.4 compared to 111.6 for Edinburgh). This is in part a reflection of Milton Keynes' greater proportion of knowledge-based businesses, new business registrations, and existing business population. However, it has not enjoyed the same increase in wages and experienced an increase in unemployment, whereas this stayed at a low level for the City of Edinburgh with little change between 2022 and 2026.

The next city on the list is Manchester (UKCI in 2026 of 113.3), which is currently perceived to be the principal model for urban development by many. It is also expected to be the template for the devolution of powers and economic control by the former mayor of Greater Manchester, Andy Burnham, now that he is Prime Minister. The university cities of Cambridge and Oxford both fall in the city rankings. Cambridge drops from 3rd in 2022 to 4th, while Oxford experiences a larger drop in UKCI to 105.8 from 109.9 and its ranking falls from 6th to 8th.

Aberdeen City which for many years was one of the most competitive cities, being at the centre of the North Sea oil industry, has slipped over the years as the tax regime for oil production in the UK has become more hostile at the same time as reserves have diminished. However, the geopolitical uncertainty since the COVID-19 pandemic will produce winners as well as losers and issues of energy security and rising oil prices, due to supply shocks linked to the war in Ukraine and the Middle East, may see this pattern reversed.

Many of the cities towards the bottom of the UKCI city rankings are not in the group of the largest cities, which will be discussed in more detail in sub-section 6.3. With the exception of Plymouth with its links to the armed forces, the least competitive cities tend to have industrial pasts such as Kingston upon Hull – fishing and whaling industry (Yorkshire and the Humber), Sunderland – shipbuilding and more recently automotives (North East) and Stoke-on-Trent - ceramics (West Midlands). With the decline of these industries in the UK these cities lack the scale to benefit from agglomeration economies, such as those enjoyed by Manchester, or the specialisms linked to the knowledge economy of Cambridge.

TABLE 6.01: CITY UK COMPETITIVENESS INDEX 2026 (UK=100)

City Rank 2026	City	UKCI 2022	City Rank 2022	UKCI 2026
1	City of Edinburgh	115.7	2	117.7
2	Milton Keynes	115.8	1	113.8
3	Manchester	110.1	4	113.3
4	Cambridge	112.3	3	111.8
5	Brighton and Hove	110.0	5	108.1
6	Aberdeen City	105.3	8	107.1
7	Bristol, City of	105.9	7	106.4
8	Oxford	109.9	6	105.8
9	Chelmsford	102.1	11	101.9
10	Exeter	99.4	16	101.5
11	Leeds	102.1	12	101.2
12	York	102.7	9	101.2
13	Cardiff	100.6	15	100.0
14	Glasgow City	101.1	14	99.7
15	Salford	102.1	10	98.2
16	Southampton	101.3	13	97.3
17	Preston	93.9	25	96.3
18	Worcester	98.5	17	96.3
19	Peterborough	95.7	20	95.6
20	Bath (and North East Somerset)	96.2	18	95.6
21	Portsmouth	93.4	26	95.1
22	Liverpool	95.7	21	94.9
23	Colchester	94.7	24	94.3
24	Coventry	95.1	23	94.2
25	Newcastle upon Tyne	93.0	27	94.1
26	Derby	95.9	19	92.9
27	Norwich	95.5	22	92.8
28	Birmingham	92.4	28	92.2
29	Nottingham	90.5	30	91.7
30	Sheffield	90.7	29	89.9
31	Newport	89.6	32	89.9
32	Canterbury	88.9	33	89.1
33	Gloucester	87.1	37	88.5
34	Leicester	90.0	31	88.5
35	Lancaster	85.5	38	87.7
36	Southend-on-Sea	87.6	35	87.4
37	Wolverhampton	84.8	43	86.9
38	Dundee City	88.4	34	86.8
39	Wakefield	85.0	41	86.2
40	Lincoln	84.9	42	85.6
41	Swansea	87.1	36	85.1
42	Bradford	84.5	44	83.9
43	Doncaster	85.1	39	83.5

TABLE 6.01: CONTINUED

City Rank 2026	City	UKCI 2022	City Rank 2022	UKCI 2026
44	Stoke-on-Trent	83.1	46	83.4
45	Plymouth	85.0	40	83.2
46	Sunderland	82.0	47	81.1
47	Kingston upon Hull, City of	83.4	45	81.0

6.2. Competitiveness within Rural and Urban Localities

Table 6.02 presents the weighted average UKCI score for localities based on their urban or rural nature.[22] As in previous years, those localities in the larger urban areas display the highest levels of competitiveness. In part this may reflect the dominance of the London localities within this group. Also within this group are the localities in the West Midlands, Manchester and West Yorkshire urban agglomerations. Although remaining above the UKCI average with a UKCI score of 102.7 (UK = 100), the largest urban areas continue to experience a decline in competitiveness although there is still a considerable gap to the next most competitive type of locality, those with a significant rural part of the locality (UKCI score of 96.6 in 2026).

All types of urban locality have experienced a fall in their UKCI score relative to the UK average. In contrast all more rural areas have seen an improvement in their UKCI score between 2022 and 2026. As noted previously in Sections 4 and 5, COVID-19 has been linked to a desire to move out of cities to areas with more green space. The increased use of hybrid working has also allowed those living in less urbanised areas to remain based in more highly rewarded knowledge-based occupations.[23]

[22] The UKCI scores for areas by rural or urban nature are weighted averages based on the populations of those localities that are classified as belonging to each type of areas. This provides a better idea of what someone living in each type of area is likely to experience rather than atypical smaller areas being allowed to over-influence the average.

[23] Adams-Prassl, A. Boneva, T. Golin, M. and Rauh, C. (2022) 'Work that can be done from home: evidence on variation within and across occupations and industries', *Labour Economics*, 74, 102083. doi: 10.1016/j.labeco.2021.102083 Barrero, J. M. Bloom, N. and Davis, S. J. (2023) 'The evolution of work from home', *Journal of Economic Perspectives*, 37 (4), 23-50.

TABLE 6.02: UKCI INDEX BY RURAL/URBAN NATURE OF LOCALITIES (UK=100)

	2022	2026	Change 2022 to 2026
Major Urban	103.0	102.7	-0.3
Large Urban	95.3	95.2	-0.1
Other Urban	93.4	92.7	-0.7
Significant Rural	96.4	96.6	0.2
Rural-50	92.4	92.7	0.3
Rural-80	91.5	91.8	0.3

6.3. Competitiveness of the UK's Largest Urban Areas

This final sub-section covers the largest cities outside London: the alliance of core cities[24] plus Edinburgh the second largest city in Scotland. It has already been noted above that the City of Edinburgh and Manchester are two of the most competitive cities overall, so it is no surprise to find them ranked first and second in the rankings for the largest cities. Consistent with 2022, the third and fourth most competitive cities in 2026 are Bristol (UKCI = 106.4) and Leeds (UKCI = 101.2).

The greatest change is found for Belfast, which improves its UKCI score from 96.7 in 2022 to a UKCI 2026 score of 100.1 just above the value representing the UK average. This means that Belfast moves up two places in the extended core city rankings to 5th.

Some care needs to be taken with the figures for Belfast as productivity figures are not available yet for 2023, so the 2022 figure must be used as the most recent figure unlike the other cities. Nevertheless, the improvement in Belfast's UKCI is positive and driven by large increases in the presence of more highly qualified residents and increasing business registrations. Northern Ireland is of course the one part of the UK that still has greater access to the European Union markets in a fashion closer to pre-Brexit arrangements, which may benefit its economy although at the expense of some frictions with the rest of the UK.[25] The results here provide tentative support for the view that fears that having to abide by European Union regulations may prevent Northern Ireland benefiting from other UK negotiated trade agreements to its detriment,[26] may be exaggerated and outweighed by the benefits.

[24] https://www.corecities.com/about-us/what-core-cities-uk

[25] Duparc-Portier, G. and Figus, G. (2022) 'The impact of the new Northern Ireland protocol: can Northern Ireland enjoy the best of both worlds?', *Regional Studies*, 56 (8), 1404-1417.

[26] Melo Araujo, B. and Wilkinson, D. (2024) 'Northern Ireland's hybrid trade regime: an examination of the relationship between the Ireland-Northern Ireland Protocol and the UK's post-Brexit trade agreements', *Journal of International Trade Law and Policy*, 23 (1), 37-58.

The least competitive major cities in the UK in 2026 are Sheffield (UKCI = 89.9) and Nottingham (UKCI = 91.7). These two cities swapped places in the rankings between 2022 and 2026, but remain the two least competitive of the extended core cities. In relative terms they are smaller core cities compared to Manchester, Birmingham and Glasgow for example. They have also gained fewer devolved powers than Manchester and Birmingham, but with positive changes more recently. It will be of interest to see if this will allow them to improve their competitiveness through more place-based sensitive policies as envisaged by those promoting greater devolution,[27] or if having missed out on first mover advantage this ground will be hard to recover, in a similar fashion to concerns about more rural areas being left behind by devolution.[28]

TABLE 6.03: UKCI INDEX AND RANK FOR EXTENDED CORE CITIES

Extended Core City Rank 2026	City	Extended Core City Rank 2022	UKCI 2022	UKCI 2026	Change 2022-2026 UKCI	Change 2022-2026 Extended Core City Rank
1	City of Edinburgh	1	115.7	117.7	2.0	0
2	Manchester	2	110.1	113.3	3.2	0
3	Bristol, City of	3	105.9	106.4	0.5	0
4	Leeds	4	102.1	101.2	-0.9	0
5	Belfast	7	96.7	100.1	3.4	+2
6	Cardiff	6	100.6	100.0	-0.6	0
7	Glasgow City	5	101.1	99.7	-1.4	-2
8	Liverpool	8	95.7	94.9	-0.8	0
9	Newcastle upon Tyne	9	93.0	94.1	1.1	0
10	Birmingham	10	92.4	92.2	-0.3	0
11	Nottingham	12	90.5	91.7	1.2	+1
12	Sheffield	11	90.7	89.9	-0.7	-1

[27] Bailey, D. and Hildreth, P. (2024) 'Place, devolution and industrial strategy: three key tests for labour', *Contemporary Social Science*, 19 (4), 407-423.

[28] Warner, S. Newman, J. Diamond, P. and Richards, D. (2024) 'The challenge of devolved English governance and the rise of political spatial inequality', *Parliamentary Affairs*, 77 (4), 735-764.

7. A Regional Perspective

This section focuses on competitiveness performance at regional level and the results presented below are weighted averages of the local UKCI scores aggregated to a regional level. The weighting is based on each locality's population so that the overall average reflects the competitiveness of a region as a whole.

7.1. Regional Competitiveness in 2026

Table 7.01 indicates that at regional level there have not been any ranking changes between 2022 and 2026. London is on average much more competitive than other regions (UKCI 2026 = 114.9), and only the South East is also above the UK average (UKCI 2026 = 102.4). The North East (UKCI 2026 = 84.2) and Wales (UKCI 2026 = 85.6) remain the least competitive regions.

Changes in UKCI scores between 2022 and 2026 are small. The two most competitive regions of London and the South East each see their UKCI score fall by 0.4 points, whereas those ranked 3rd (East of England) to 6th (North West) all see a small improvement in UKCI score. However, this is not a simple story of regional convergence (see Section 5), as the 8th ranked region (East Midlands) through to the 10th (Wales) all see small decreases in their UKCI scores between 2022 and 2026.

It was also evident in sub-section 3.3 that for most regions there was more variation between the localities in a region than appears to be present between regions. It is important that this last point is not forgotten when considering attempts to 'level up' or 'rewire' Great Britain through place based policies and devolution. This is something that is partly considered in Section 8 where we address the competitiveness of combined authorities and city regions, as well as the outgoing local enterprise partnerships (LEPs).

TABLE 7.01: AVERAGE UKCI LOCAL SCORE AND RANK BY REGION (UK=100)

Region	UKCI		UKCI Rank		Change 2022-2026	
	2022	2026	2022 Rank	2026 Rank	UKCI	Average Rank Change by Locality
London	115.3	114.9	71	74	-0.4	-3.1
South East	102.9	102.4	108	107	-0.4	+0.6
East of England	96.8	97.1	150	147	0.3	+2.3
South West	94.5	94.7	167	165	0.2	+2.4
Scotland	93.5	94.0	182	178	0.4	+4.8
North West	92.8	93.1	191	189	0.3	+2.5
West Midlands	91.1	91.1	202	204	0	-1.2
East Midlands	90.4	89.9	204	210	-0.5	-5.7
Yorkshire and the Humber	90.1	89.5	213	218	-0.6	-4.9
Wales	86.2	85.6	256	260	-0.6	-4.0
North East	84.1	84.2	277	275	0.1	+2.0

8. Devolution and Place-Based Development

In previous editions of the UKCI reports we have focused on the competitiveness of the local enterprise partnerships (LEPs) that were introduced in England as an effort to drive local development, and their city region equivalents in Wales and Scotland. It was argued that LEPs, by giving a greater role to the private sector, would more effectively support local economic development, but the manner in which they operated has been criticised as lacking accountability and transparency.[29] In more recent years, there have been growing arguments for genuine devolution and decentralisation with mayoral combined authorities becoming the preferred mechanism to achieve this.[30] As city deals have been agreed, the LEPs have been subsumed into the combined authorities formed and/or effectively retired.

We now provide measures of competitiveness for the combined authorities. Although there are plans to devolve power further both in terms of depth and in geographical coverage, currently these do not cover all parts of the country and have differing degrees of devolved power. Nevertheless, these areas are likely to be of growing importance in years to come, and as such we measure their competitiveness, alongside that of the City Regions of Wales and Scotland, in sub-section 8.1.

As well as overall UKCI index, we break down the UKCI into its component sub-indices and report these in sub-sections 8.2 to 8.4 below. This will provide an indication of the resources available to decision makers which will be of particular relevance for those with both more authority and accountability as elected mayors, and the extent to which they are generating outputs and the benefits experienced by the residents.

Although the LEPs are disappearing we provide one last measure of their competitiveness in 2026 (sub-section 8.5). This allows those who are interested to use figures from previous UKCI reports as a glimpse of how successful, or otherwise, they have been in improving competitiveness over their time in existence.

[29] Newman, J. and Gilbert, N. (2022) 'The role of the private sector in subnational governance: learning lessons from England's local enterprise partnerships', *Local Economy*, 37 (1/2), 66-83.

[30] Fransham, M. Herbertson, M. Pop, M. Bandeira Morais, M. and Lee, N. (2023) 'Level best? The levelling up agenda and UK regional inequality', *Regional Studies*, 57 (11), 2339-2352.

8.1. Competitiveness of Combined Authorities and City Regions

The combined authorities, as part of the agenda to generate greater devolution, are becoming more important for economic development decision making, but they do not cover the whole of England geographically. Although the North and to a lesser extent the Midlands are gradually being covered, there remain large gaps further south as shown in Figure 8.01 below.

FIGURE 8.01: GEOGRAPHICAL COVERAGE OF COMBINED AUTHORITIES IN ENGLAND (2026)

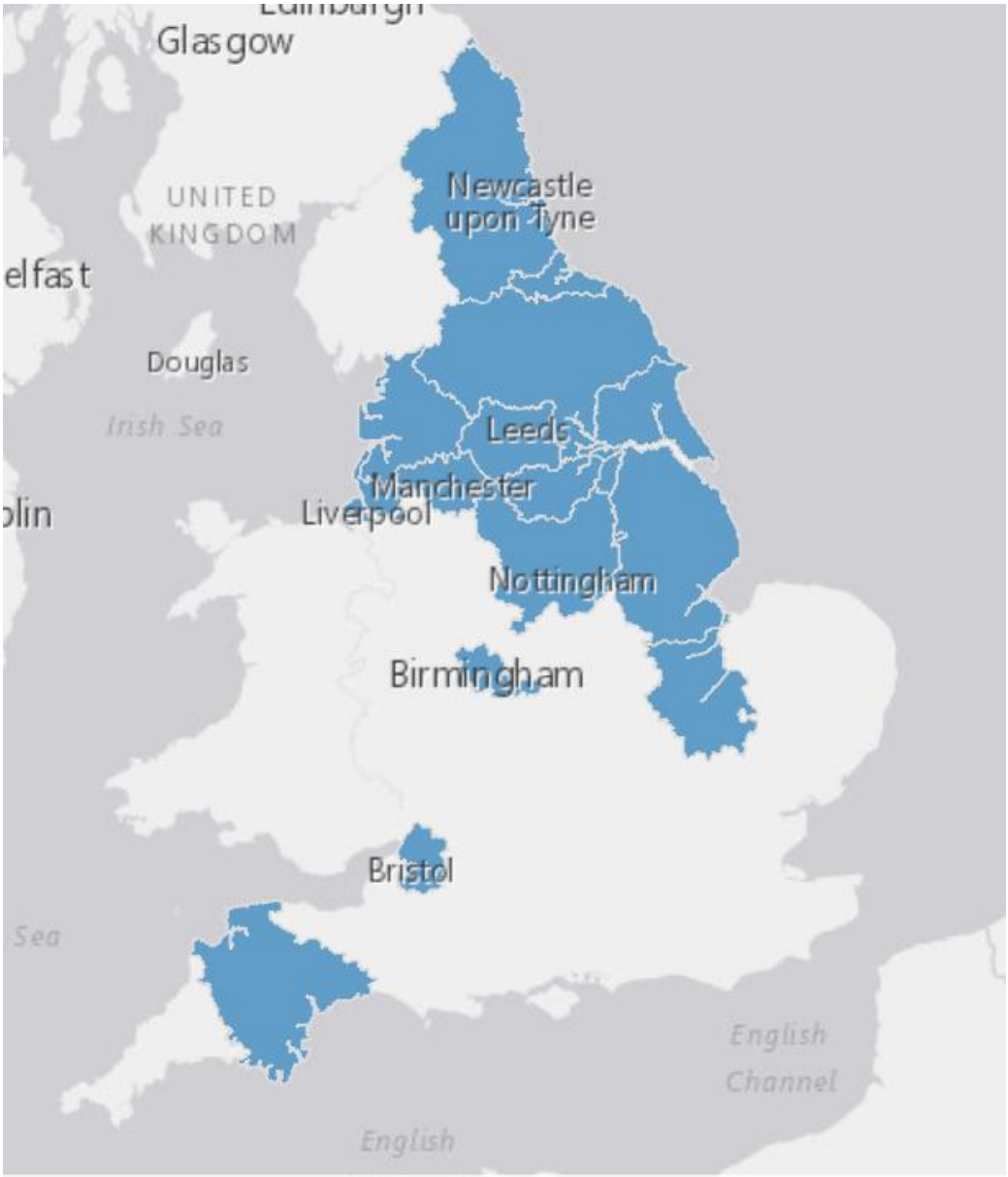


Table 8.01 below presents the UKCI for the Combined Authority areas of England, and the City Regions of Scotland and Wales for 2022 and 2026. The West of England combined authority that is centred around Bristol is ranked first (UKCI 105.7). This is consistent with the results found in sub-section 6.3 when considering the core cities where Bristol was ranked 3rd. The West of England combined authority as well as containing Bristol contains Bath and North East Somerset, and South Gloucestershire. These provide strengths in the advanced manufacturing present in South Gloucestershire in particular, and the knowledge-intensive services such as the creative industries in Bristol.[31]

In 2026, the next most competitive areas are Aberdeen City Region (UKCI 102.0) and Edinburgh and South East Scotland City Region (UKCI 101.4). As noted in previous sections, they benefit from their long-established oil and finance specialisms respectively. The fourth most competitive combined authority and city region area is Cambridgeshire and Peterborough (UKCI 101.2), which contains the life sciences hub of Cambridge.

Interestingly, when considering the core cities and defining them by their locality, Manchester was one of the most competitive, but Greater Manchester is only ranked fifth in the combined authority and city region rankings. Its UKCI score of 96.7 is lower by a margin than the top four areas. This highlights how although Manchester has been held up as an example of where devolution has been successful, some care needs to be taken as the broader Greater Manchester combined authority is less competitive. This highlights that there are considerable variations in the competitiveness of localities within the combined authority. For example, Bolton has a UKCI score in 2026 of 87.4, well below the 100 figure representing the UK average, which contrasts with 113.3 for Manchester.

At the other end of the scale, the Welsh City Regions of Swansea Bay (UKCI 83.1) and Mid Wales (UKCI 84.0) along with the combined authorities from the North East, Tees Valley (UKCI 84.6) and North East (UKCI 84.7) take up the bottom four positions. Mid Wales is one of the most rural areas considered, and although Swansea Bay and the North East (Newcastle) are centred around cities, they also have large rural areas. The cities and towns in these combined authorities have histories of heavy industry and have suffered deindustrialisation with less success than cities, such as Manchester, in moving to more knowledge and services led economies.

[31] https://www.westofengland-ca.gov.uk/about-us/regional-insights/regional-evidence-report/

TABLE 8.01: UKCI INDEX AND RANK FOR COMBINED AUTHORITIES

Combined Authority Rank 2026	Combined Authority	Combined Authority Rank 2022	UKCI 2022	UKCI 2026	Change 2022-2026 UKCI	Change 2022-2026 Combined Authority Rank
1	West of England	1	105.8	105.7	-0.1	0
2	Aberdeen City Region	3	100.6	102.0	1.4	+1
3	Edinburgh and South East Scotland City Region	4	100.5	101.4	0.9	+1
4	Cambridgeshire and Peterborough	2	100.9	101.2	0.3	-2
5	Greater Manchester	5	96.3	96.7	0.4	0
6	York and North Yorkshire	6	96.1	95.8	-0.4	0
7	Stirling and Clackmannanshire City Region	7	94.8	94.5	-0.3	0
8	Glasgow and Clyde Valley City Region	8	93.4	93.4	0.0	0
9	Inverness and Highland City Region	10	90.9	93.2	2.3	+1
10	West Yorkshire	9	92.1	92.0	-0.1	-1
11	West Midlands	11	90.4	90.0	-0.4	0
12	Lancashire	14	89.0	89.8	0.8	+2
13	Devon and Torbay	15	88.8	89.6	0.8	+2
14	East Midlands	12	89.9	89.3	-0.6	-2
15	Liverpool City Region	13	89.5	89.0	-0.5	-2
16	Cardiff Capital Region	16	88.8	87.9	-0.9	0
17	Hull and East Yorkshire	17	87.6	86.6	-1.0	0
18	North Wales	20	86.0	86.0	0.0	+2
19	Greater Lincolnshire	19	86.2	85.7	-0.5	0
20	South Yorkshire	18	86.6	85.7	-0.9	-2
21	North East	21	84.6	84.7	0.0	0
22	Tees Valley	22	84.6	84.6	0.0	0
23	Mid Wales	24	83.3	84.0	0.7	+1
24	Swansea Bay City Region	23	84.3	83.1	-1.2	-1

8.2. Input Competitiveness of Combined Authorities and City Regions

The UKCI Inputs Index highlights that the more competitive combined authorities have access to a greater quantity of the resources associated with competitiveness. The West of England, although seeing a slight reduction of its UKCI Inputs Index between 2022 (UKCI Inputs = 106.0) and 2026 (UKCI Inputs = 103.5), remains ranked first ahead of Aberdeen City Region and Cambridgeshire and Peterborough. Only the top two combined authorities have a UKCI Inputs Index score that indicates that they have access to more resources than the UK average.

Even with hosting the knowledge centre of Cambridge, Cambridgeshire and Peterborough as a whole lags the UK average (UKCI Inputs 98.6). The potential to misinterpret the combined authority as being similar to its most successful locality means that it can come as a surprise that the West of England has a greater proportion of its population holding higher qualifications (54.8 percent) than Cambridgeshire and Peterborough (45.3 percent). Similarly, the West of England has a slightly higher proportion of its enterprises classed as knowledge-intensive (26.9 percent compared to 24.0 percent).

Two of the three combined authorities and city regions with the least access to resources are located in Wales, Swansea Bay City Region and North Wales, which is joined in the bottom three by the North East combined authority (containing Newcastle upon Tyne). Swansea Bay City Region lags the UK average in terms of key inputs relating to knowledge-intensive enterprises (8.0 percent compared to a UK average of 22.7 percent), business registrations (31.1 per 10,000 residents compared to the UK average of 45.8), and existing business population (32.9 per 1000 residents compared to 39.5 for the UK).

North Wales also performs weakly with regard to knowledge inputs. In the case of the North East, while the creation of new enterprises and existing enterprise population are relatively weak, it is the proportion of the population with higher skills rather than knowledge-intensive businesses where it lags the UK average. Although, the weaker indicators differ for the North East and the Welsh combined authorities/city regions, over time each may lead to a fall in the other. Without sufficient skilled labour the North East may struggle to retain its knowledge-based enterprises. In contrast, the Welsh city regions may struggle to retain their skilled workers if there are not businesses present to provide appropriate employment.

TABLE 8.02: UKCI INPUTS SCORES AND RANK FOR COMBINED AUTHORITIES

Rank 2026	Combined Authority	Rank 2022	UKCI Inputs 2022	UKCI Inputs 2026	Change 2022-2026 UKCI Inputs Index	Change 2022-2026 Inputs Index Rank
1	West of England	1	106.0	103.5	-2.5	0
2	Aberdeen City Region	3	100.1	101.9	1.8	+1
3	Cambridgeshire and Peterborough	2	100.2	98.6	-1.7	-1
4	Greater Manchester	4	98.3	98.0	-0.3	0
5	York and North Yorkshire	5	97.3	94.0	-3.3	0
6	Edinburgh and South East Scotland City Region	6	94.7	93.4	-1.2	0
7	West Yorkshire	8	89.8	90.2	0.4	+1
8	Stirling and Clackmannanshire City Region	7	90.4	90.1	-0.3	-1
9	West Midlands	9	88.2	88.9	0.7	0
10	Devon and Torbay	12	86.8	88.7	1.8	+2
11	Inverness and Highland City Region	18	83.2	88.4	5.3	+7
12	Mid Wales	17	83.4	86.9	3.5	+5
13	Glasgow and Clyde Valley City Region	11	87.1	86.7	-0.4	-2
14	Lancashire	14	85.8	86.0	0.1	0
15	East Midlands	10	87.9	85.8	-2.1	-5
16	Liverpool City Region	13	86.3	84.2	-2.1	-3
17	Cardiff Capital Region	15	84.5	82.4	-2.1	-2
18	South Yorkshire	16	84.0	80.8	-3.2	-2
19	Tees Valley	23	78.1	79.8	1.6	+4
20	Hull and East Yorkshire	19	82.1	79.7	-2.4	-1
21	Greater Lincolnshire	22	78.2	78.4	0.2	+1
22	North Wales	20	78.6	78.2	-0.4	-2
23	North East	21	78.3	77.5	-0.9	-2
24	Swansea Bay City Region	24	77.6	76.3	-1.3	0

8.3. Output Competitiveness of Combined Authorities and City Regions

Moving to the extent that the combined authorities are capable of generating high value outputs from the resources available to them, Table 8.03 reports the UKCI Outputs Index for the combined authorities and city regions in 2022 and 2026. The West of England is the highest ranked combined authority in 2026 (UKCI Outputs = 109.5), but this time is followed by the Edinburgh and South East Scotland City Region (UKCI Outputs = 109.2). Both areas have high employment rates compared to the UK average, but whereas the West of England outperforms the UK average for GVA per capita, it is labour productivity that is Edinburgh and South East Scotland's strength. These two combined authorities/city regions lead the other areas by some distance, with Cambridgeshire and Peterborough having the next highest score at 102.0, just over the UK average (UKCI Outputs = 100).

Again, the bottom three places are taken by Welsh city regions and a combined authority from the North East of England region. However, while Swansea Bay City Region (UKCI Outputs = 78.1) remains a constant, it is Tees Valley (UKCI Outputs = 80.2) and Mid Wales (UKCI Outputs = 72.5) that join it. Although for all three combined authorities/city regions their employment rates slightly lag the UK average, it is their GVA per capita and labour productivity where they perform markedly worse. On this basis, they do get their population into work, but the jobs create less value than in other areas.

TABLE 8.03: UKCI OUTPUTS SCORES AND RANK FOR COMBINED AUTHORITIES

Rank 2026	Combined Authority	Rank 2022	UKCI Outputs 2022	UKCI Outputs 2026	Change 2022-2026 UKCI Outputs Index	Change 2022-2026 Outputs Index Rank
1	West of England	1	108.2	109.5	1.3	0
2	Edinburgh and South East Scotland City Region	2	107.3	109.2	1.9	0
3	Cambridgeshire and Peterborough	3	101.6	102.0	0.4	0
4	Aberdeen City Region	4	99.9	100.2	0.3	0
5	York and North Yorkshire	5	95.6	95.3	-0.3	0
6	Greater Manchester	6	94.2	94.6	0.4	0
7	Stirling and Clackmannanshire City Region	7	93.5	92.9	-0.7	0
8	Glasgow and Clyde Valley City Region	8	92.8	92.7	-0.1	0
9	Inverness and Highland City Region	10	89.9	91.4	1.6	+1
10	West Yorkshire	9	90.0	89.8	-0.2	-1
11	Lancashire	11	86.5	87.3	0.8	0
12	Liverpool City Region	12	86.2	86.0	-0.3	0
13	Devon and Torbay	18	84.5	85.9	1.4	+5
14	East Midlands	14	86.0	85.8	-0.2	0
15	Hull and East Yorkshire	13	86.1	85.3	-0.8	-2
16	Greater Lincolnshire	15	85.7	85.2	-0.6	-1
17	Cardiff Capital Region	16	85.2	85.1	-0.1	-1
18	North Wales	17	84.6	84.9	0.3	-1
19	West Midlands	19	84.5	84.5	0.03	0
20	North East	21	81.6	82.7	1.0	+1
21	South Yorkshire	20	81.7	81.2	-0.4	-1
22	Tees Valley	22	81.3	80.2	-1.1	0
23	Swansea Bay City Region	23	79.8	78.1	-1.6	0
24	Mid Wales	24	72.2	72.5	0.3	0

8.4. Outcome Competitiveness of Combined Authorities and City Regions

Lastly, we consider the extent that the outputs created by the combined authorities and city regions lead to positive outcomes for the population. As in the other sub-indices, the West of England leads the rankings with a UKCI Outcomes Index score of 104.3. A further six combined authorities achieve, or better, the UK average score for the UKCI Outcomes Index (UK = 100). Interestingly five of these are located in Scotland (Aberdeen City Region, Edinburgh and South East Scotland City Region, Glasgow and Clyde Valley City Region, Stirling and Clackmannanshire City Region, and Inverness and Highland City Region). Although not ranked towards the bottom of the UKCI Inputs and UKCI Outputs Indices, they are not always the top ranked either. With the exception of Aberdeen City Region, that also has a relatively high median weekly wage (£820) compared to the UK average of £767, it is lower unemployment rates where they perform more strongly. However, this should be set against a lower economic activity and employment rate, which appear in the UKCI Inputs Index and UKCI Outputs Index respectively. This means these city regions, while not fully utilising their labour resource are providing jobs for more of those who are engaged with the labour force.

The relatively rural combined authorities/city regions of Mid Wales (UKCI Outcomes = 93.5) and Greater Lincolnshire (UKCI Outcomes = 94.0) are the lowest ranked on the UKCI Outcomes Index. In both cases the issue is not high unemployment, but rather the employment that is available is less highly rewarded than that in the UK as a whole.

TABLE 8.04: UKCI OUTCOMES SCORES AND RANK FOR COMBINED AUTHORITIES

Rank 2026	Combined Authority	Rank 2022	UKCI Outcomes 2022	UKCI Outcomes 2026	Change 2022-2026 UKCI Outcomes Index	Change 2022-2026 Outcomes Index Rank
1	West of England	1	103.1	104.3	1.1	0
2	Aberdeen City Region	2	102.0	104.1	2.1	0
3	Cambridgeshire and Peterborough	3	101.0	103.1	2.2	0
4	Edinburgh and South East Scotland City Region	7	99.7	101.9	2.2	+3
5	Glasgow and Clyde Valley City Region	5	100.5	101.0	0.6	0
6	Stirling and Clackmannanshire City Region	4	100.6	100.8	0.2	-2
7	Inverness and Highland City Region	6	100.1	100.0	-0.1	-1
8	York and North Yorkshire	15	95.5	98.0	2.4	+7
9	Greater Manchester	12	96.3	97.3	1.0	+3
10	Liverpool City Region	13	96.2	97.3	1.1	+3
11	West Midlands	8	99.0	96.8	-2.2	-3
12	Cardiff Capital Region	9	97.1	96.7	-0.4	-3
13	East Midlands	14	96.1	96.7	0.6	+1
14	Lancashire	22	94.7	96.3	1.6	+8
15	West Yorkshire	10	96.7	96.1	-0.6	-5
16	Swansea Bay City Region	11	96.3	95.9	-0.5	-5
17	South Yorkshire	24	94.4	95.5	1.1	+7
18	North Wales	17	95.4	95.5	0.1	-1
19	Hull and East Yorkshire	20	94.9	95.2	0.3	+1
20	Devon and Torbay	16	95.4	94.5	-0.9	-4
21	North East	23	94.5	94.4	0.05	+2
22	Tees Valley	21	94.9	94.3	-0.7	-1
23	Greater Lincolnshire	19	95.2	94.0	-1.1	-4
24	Mid Wales	18	95.3	93.5	-1.8	-6

8.5. Competitiveness of LEP and City Regions

As noted above, the LEPs are largely being replaced by combined authorities with their responsibilities for local development passing to these bodies. In some cases, the old LEPs align perfectly with the new combined authorities, as is the case for the D2N2 LEP and the new East Midlands Combined County Authority (EMCCA). However, there are other LEP areas, particularly those in more rural areas and localities in southern England, that are not yet covered by a combined authority deal in the same way. An example of this would be the South East Midlands which includes Northampton and Milton Keynes.

In the next UKCI report it is likely that the gaps in the combined authority map will be much smaller. Until that time Table 8.05 presents the UKCI scores for the previous LEP areas. The Scottish and Welsh City Regions are included again to provide comparators in the other countries of Great Britain.

Given the results presented in Section 7 on regional competitiveness, it is no surprise that the most competitive LEPs are generally found in London (1st London Economic Action Partnership) and the South East (2nd Thames Valley Berkshire, 3rd Enterprise M3, 5th Buckinghamshire, 6th OxLEP). The only exception to this in the top six LEPs is Hertfordshire, which is ranked 4th and is in the East of England.

Given the UKCI scores for the combined authorities and city regions, it is not a surprise that Swansea Bay City Region is the least competitive area, followed by Mid Wales. The least competitive English LEP is the Black Country LEP in the West Midlands, and then the Tees Valley and North East LEPs in the North East region of England.

The rankings of the LEPs and City Regions have changed very little over the time that they have been in existence. This supports the argument of moving from LEPs to combined authorities. When the LEPs were first introduced the argument was that rescaling responsibility from regions to a more local level would enable policy to be tailored for local needs with greater discretion over the intended outcomes.[32] However, limited resources, powers and accountability were quickly identified as something that would limit the potential for less competitive LEPs to change their relative positions.[33]

[32] Pike, A. Marlow, D. McCarthy, A. O'Brien, P. and Tomaney, J. (2015) 'Local institutions and local economic development: the Local Enterprise Partnerships in England, 2010-', *Cambridge Journal of Regions, Economy and Society*, 8 (2), 185—204.

[33] Pugalis, L. and Bentley, G. (2013) 'Storming or performing? Local Enterprise Partnerships two years on', *Local Economy*, 28 (7/8), 863-874.

As outlined in Subsections 8.2 to 8.4 the more competitive combined authorities appear to have an advantage in terms of not just the inputs needed, but are already more effective at using them productively. As such, policies to allow combined authorities to keep more of the value they create, such as retention of a share of income tax raised,[34] may incentivise appropriate policies and activities, but it also disadvantages those combined authorities that start off from a less competitive position. Based on the findings of this report, it will be necessary for central government to continue to provide resources to support less competitive combined authorities even if they allow more autonomy over the use of these resources.

[34] National Audit Office (2026) *Devolution in England: Funding and Accountability*, London: National Audit Office.

TABLE 8.05: UKCI BY ENGLISH LOCAL ENTERPRISE PARTNERSHIP AREAS AND SCOTTISH AND WELSH CITY REGIONS (UK = 100)

Rank 2026	Local Enterprise Partnership Area/City Region	UKCI 2026	UKCI 2022	Rank 2022	Change 2022-2026 UKCI	Change 2022-2026 UKCI Rank
1	The London Economic Action Partnership	128.2	127.9	1	0.3	0
2	Thames Valley Berkshire	118.3	119.0	2	-0.7	0
3	Enterprise M3	111.0	112.3	3	-1.3	0
4	Hertfordshire	110.6	109.6	4	1	0
5	Buckinghamshire	107.1	107.7	5	-0.6	0
6	OxLEP	105.6	106.8	6	-1.2	0
7	Cheshire and Warrington	105.1	103.4	8	1.7	+1
8	West of England	103.8	104.0	7	-0.2	-1
9	Coast to Capital	103.7	103.2	9	0.5	0
10	Aberdeen City Region	102.0	100.6	12	1.4	+2
11	Edinburgh and South East Scotland City Region	101.4	100.5	13	0.9	+2
12	The Business Board	101.2	100.9	10	0.3	-2
13	Coventry and Warwickshire	100.6	100.7	11	-0.1	-2
14	GFirst	99.5	98.6	16	0.9	+2
15	Swindon and Wiltshire	99.4	99.5	14	-0.1	-1
16	South East Midlands	98.2	98.7	15	-0.5	-1
17	Greater Manchester	96.7	96.2	17	0.5	0
18	York and North Yorkshire	95.8	96.1	18	-0.3	0
19	Worcestershire	95.5	95.7	19	-0.2	0
20	Dorset	95.0	93.7	25	1.3	+5
21	Solent	94.8	94.6	21	0.2	0
22	Stirling and Clackmannanshire City Region	94.5	94.8	20	-0.3	-2
23	South East	94.4	94.4	23	0	0
24	Greater Birmingham and Solihull	93.9	94.4	22	-0.5	-2
25	Leicester and Leicestershire	93.5	93.8	24	-0.3	-1
26	Glasgow and Clyde Valley City Region	93.4	93.4	26	0	0
27	Inverness and Highland City Region	93.2	90.9	28	2.3	+1
28	Leeds City Region	92.0	91.6	27	0.4	-1
29	Cumbria	91.0	90.4	29	0.6	0
30	The Marches	90.5	89.3	33	1.2	+3
31	New Anglia	90.1	90.0	30	0.1	-1
32	Lancashire	89.8	89.0	36	0.8	+4
33	D2N2	89.3	89.9	31	-0.6	-2
34	Liverpool City Region	89.0	89.5	32	-0.5	-2
35	Heart of the South West	88.9	89.0	35	-0.1	0
36	Stoke-on-Trent and Staffordshire	88.2	89.1	34	-0.9	-2
37	Cardiff Capital Region	87.9	88.8	37	-0.9	0
38	Cornwall and Isles of Scilly	86.8	86.9	39	-0.1	+1

TABLE 8.05: CONTINUED

Rank 2026	Local Enterprise Partnership Area/City Region	UKCI 2026	UKCI 2022	Rank 2022	Change 2022-2026 UKCI	Change 2022-2026 UKCI Rank
39	Hull and East Yorkshire	86.6	87.6	38	-1	-1
40	Greater Lincolnshire	86.1	86.5	41	-0.4	+1
41	North Wales	86.0	86.0	42	0	+1
42	South Yorkshire	85.7	86.6	40	-0.9	-2
43	North East	84.7	84.6	43	0.1	0
44	Tees Valley	84.6	84.6	44	0	0
45	Black Country	84.1	82.3	47	1.8	+2
46	Mid Wales	84.0	83.3	46	0.7	0
47	Swansea Bay City Region	83.1	84.3	45	-1.2	-2

9. Competitiveness and Foreign-Owned Investment

This section considers the potential for foreign investment, in the form of foreign-owned enterprises, to be related to competitiveness. It does not attempt to argue for the direction of causality to run from one to the other. It is highly likely that foreign businesses will be attracted to more competitive localities as these areas will have the knowledge resources desired and efficient institutions that utilise these resources in an effective manner.[35] However, it is also possible that competitiveness will be improved by foreign firms, which may be more efficiently run or more innovative, produce knowledge spillovers to other businesses operating in the locality,[36] or simply create demand for inputs from local businesses.[37] It is probable that relationships exist running in both directions to create a virtuous circle for those competitive localities that attract foreign enterprises, and a vicious one for those less competitive localities that are less attractive. It should also be noted that potentially the type of employment created by foreign businesses may have a differing effect,[38] but that is beyond the analysis here.

We consider three measures of foreign influence drawn from analysis by the ONS.[39] This data captures the influence of foreign-owned enterprises in a number of different manners as discussed below. Unfortunately, it is measured at the unitary authority and county spatial levels rather than the local authority district level. This means for two-tier localities the county values are applied to all constituent local authority district areas. Similarly, figures are not available for individual London Boroughs, but rather for Inner London and Outer London. This largely avoids missing data where anonymity might be problematic, for example, where a small local economy is dominated by a large foreign-owned employer. It does, however, mean that some important variations within counties will not be captured in this initial analysis.

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[35] Majocchi, A. and Presutti, M. (2009) 'Industrial clusters, entrepreneurial culture and the social environment: the effects on FDI distribution', *International Business Review*, 18 (1), 76–88.
Fahed, W. B. (2013) 'The effect of entrepreneurship on foreign direct investment', *International Journal of Social, Behavioural, Educational, Economic, Business and Industrial Engineering*, 7 (6), 1346–1358.

[36] Kim, P.-H. and Li, M. (2014) 'Injecting demand through spillovers: foreign direct investment, domestic socio-political conditions, and host-country entrepreneurial activity', *Journal of Business Venturing*, 29 (2), 210–231.

[37] Markusen, J. R. and Venables, A. J. (1999) 'Foreign direct investment as a catalyst for industrial development', *European Economic Review*, 43 (2), 335–356.

[38] Thompson, P. and Zang, W. (2022) 'A matter of life and death? Knowledge intensity of FDI activities and domestic enterprise', *Papers in Regional Science*, 101 (5), 1157-1179.

[39] Data from the Office for National Statistics at the county and unitary authority level https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/adhocs/2020foreignownershipofenterprisesbycountyandunitaryauthority2023. The data is drawn from the Inter-Departmental Business Register (IDBR). The main administrative sources for the IDBR are VAT trader and PAYE employer information passed to the ONS by HM Revenue & Customs under the Value Added Tax Act 1994 for VAT traders and the Finance Act 1969 for PAYE employers.

The first measure considers the proportion of enterprises that are foreign owned. This captures the relative presence of foreign-owned enterprises, but not their impact on the local economy as these enterprises may be of different sizes, which may affect the local economy differently.[40] The second and third measures attempt to account for the relative influences of these foreign-owned enterprises by looking at their impact on employment and turnover respectively. For both measures these are expressed as a percentage of the total for the locality, so capturing their relative importance rather than the absolute scale of foreign influence.

Again, there could be differences between the two measures as foreign enterprises differ in nature across countries such as the UK. In the past more peripheral regions of the UK have attracted foreign investment leading to lower value added jobs being created and research intensive roles remaining in the foreign enterprises' home countries.[41] Equally, there are examples of knowledge centres attracting foreign investors, particularly from emerging economies, seeking to tap into these ecosystems.[42]

As noted above, the measurement of foreign influence at the county level rather than local authority district level helps to reduce the problem of missing data. However, for the employment and turnover based measures there are still some examples of missing data for some areas. These tend to be the economically smaller localities where anonymity and confidentiality may become issues.[43]

[40] Thompson, P. and Zang, W. (2023) 'The relationship between foreign direct investment and domestic entrepreneurship: the impact and scale of investments in China', *Growth and Change*, 54 (3), 694-735.

[41] Simmie, J. and Martin, R. (2010) 'The economic resilience of regions: towards an evolutionary approach', *Cambridge Journal of Regions, Economy and Society*, 3 (1), 27-43.

[42] Driffield, N. Surdu, I. and Yuan, X. (2024) 'Country-level dynamic capabilities and inward FDI: a framework on future policy adaptations applied to post-Brexit UK', *Journal of International Business Policy*, 7 (3), 276-294.
Majocchi, A. and Presutti, M. (2009) 'Industrial clusters, entrepreneurial culture and the social environment: the effects on FDI distribution', *International Business Review*, 18 (1), 76-88.

[43] Foreign-owned enterprise employment data is not available for: Clackmannanshire, Darlington, East Dunbartonshire, Merthyr Tydfil, and Orkney Islands. Foreign-owned enterprise turnover data is not available for: Bournemouth, Christchurch and Poole, Carmarthenshire, Clackmannanshire, East Dunbartonshire, Gwynedd, Merthyr Tydfil, Inverclyde and Orkney Islands.

For each measure of foreign influence, the analysis is undertaken for all localities where data is available except the City of London and Westminster. The extreme outlier nature of these two localities' UKCI scores mean they dominate any attempt to capture the relationship between competitiveness and other measures. A second analysis is also conducted with the other Inner London localities excluded. The reason for this is that although there is a wide range of competitiveness found in Inner London it typically contains the most competitive localities and, for the presence of foreign-owned enterprises in particular, higher measures of foreign influence. It is possible that the more competitive inner London localities are outliers that therefore create any relationships found. To check if this is the case, the analysis is therefore repeated without their inclusion.

The following sub-section 9.1 considers the correlation between the UKCI in 2026 and different measures of foreign influence in the localities. Sub-section 9.2 then moves on to consider how the different sub-indices relate to the measures of foreign influence. Brief conclusions from the analysis are covered in sub-section 9.3.

9.1. Foreign-Owned Enterprises and UKCI in 2026

Table 9.01 presents the Pearson correlation coefficients for the UKCI 2026 scores and the measures of foreign influence. We present figures for all localities apart from the outliers of the City of London and Westminster, and then excluding the rest of Inner London. As was suggested above, it might be the case that the correlations are affected to some degree by the presence of the Inner London localities, which include some of the most competitive localities, but are also highly influenced by foreign-owned enterprises, and indeed the correlations are all stronger when these localities are included. Nevertheless, all correlations are positive and statistically significant regardless of whether the Inner London localities are included.

The correlation is strongest when considering the number of foreign-owned enterprises as a percentage of the total. The positive but smaller correlations for the alternative measures would be consistent with some larger foreign-owned enterprises generating high levels of employment in particular, but not being as beneficial for the local economy as potentially some smaller, but more knowledge-intensive enterprises.[44]

[44] Becker, B. Driffield, N. Lancheros, S. and Love, J. H. (2020) 'FDI in hot labour markets: the implications of the war for talent', *Journal of International Business Policy*, 3 (2), 107-133.

Munday, M. Huggins, R. Cai, W. Kapitsinis, N. and Roberts, A. (2024) 'The transformative potential of inward investment on industrial cluster development: the case of the semiconductor industry in Wales', *European Planning Studies*, 32 (7), 1594-1612.

TABLE 9.01: CORRELATION BETWEEN UKCI 2026 AND FOREIGN OWNERSHIP MEASURES

		Foreign-Owned Enterprises	Employment by Foreign-Owned Enterprises	Turnover from Foreign-Owned Enterprises
Including Inner London	UKCI	0.636 (0.000)	0.434 (0.000)	0.458 (0.000)
Excluding Inner London	UKCI	0.547 (0.000)	0.399 (0.000)	0.408 (0.000)

Notes: Foreign-owned enterprises measured as percentage of total enterprises; Employment by Foreign-Owned Enterprises measured as a percentage of total employment; Turnover from Foreign-Owned Enterprises measured as a percentage of total turnover; foreign-owned enterprises measures all captured at the unitary authority and county level and the value applied to all constituent local authority district areas in two-tier areas. Westminster and the City of London excluded from all calculations; p-values in parentheses.

Figures 9.01 to 9.03 below present scatter diagrams to further illustrate the relationship between competitiveness as captured by the UKCI and the level of foreign influence. We present these with the Inner London localities excluded to illustrate the distribution and trend when these potential atypical localities cannot influence them.

When using the measures based on employment (Figure 9.02) and turnover (Figure 9.03) it can be seen that particularly for counties with higher levels of foreign influence many of their constituent localities tend to fall above or below the trend line. In other words, they have high levels of foreign influence, but rather than have the level of competitiveness we would expect they either have more or less competitiveness than expected. In Figure 9.01 the trend line tends to pass through the middle of most counties distribution of localities. Nearly 30 percent of the variation in competitiveness can be explained by the trendline ($R^2 = 0.299$). For employment ($R^2 = 0.159$) and turnover ($R^2 = 0.167$) the proportion of variation in competitiveness explained by changes in foreign influence is only a little over 15 percent.

FIGURE 9.01: CORRELATION BETWEEN UKCI 2026 AND FOREIGN-OWNED ENTERPRISES (PERCENTAGE OF TOTAL ENTERPRISES)

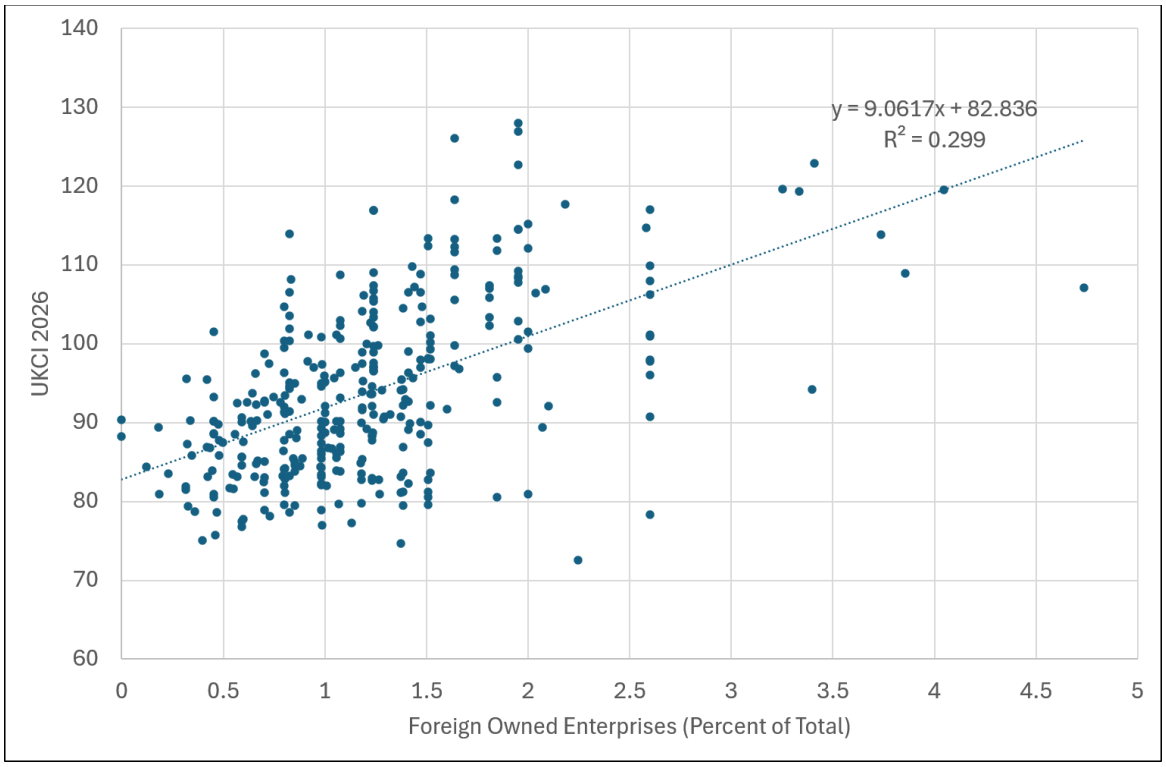


FIGURE 9.02: CORRELATION BETWEEN UKCI 2026 AND FOREIGN-OWNED ENTERPRISE EMPLOYMENT (PERCENTAGE OF TOTAL EMPLOYMENT)

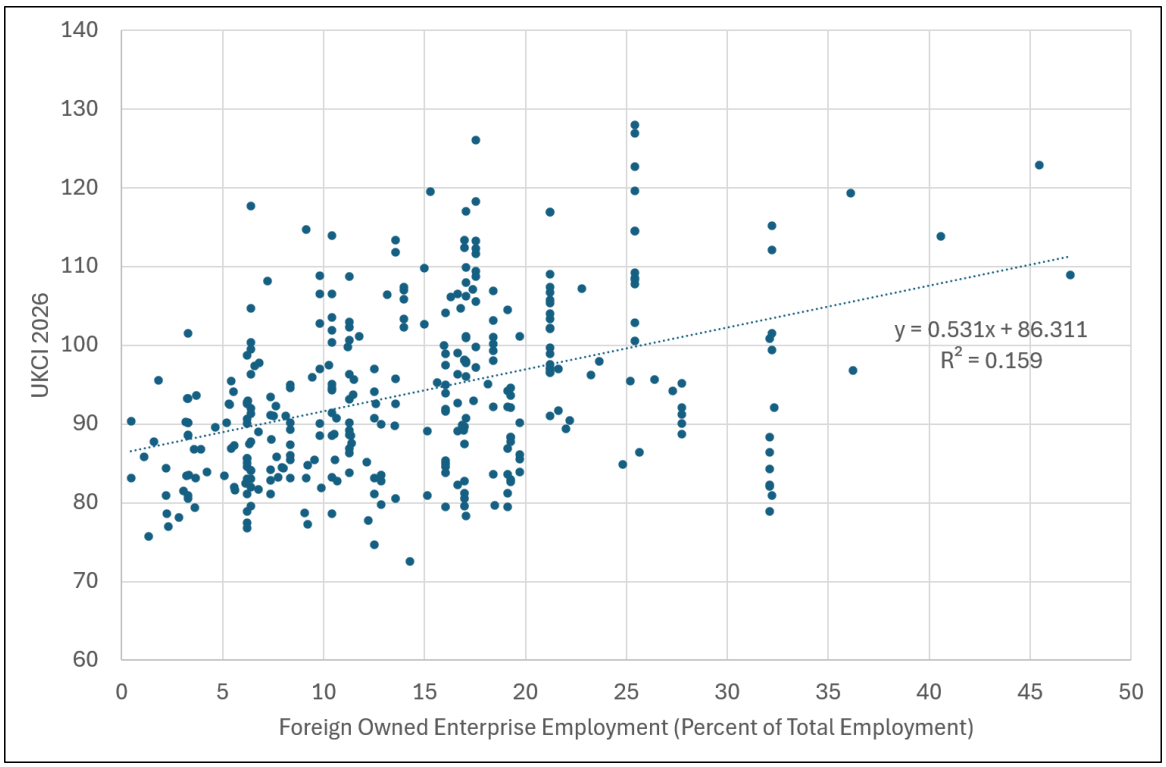
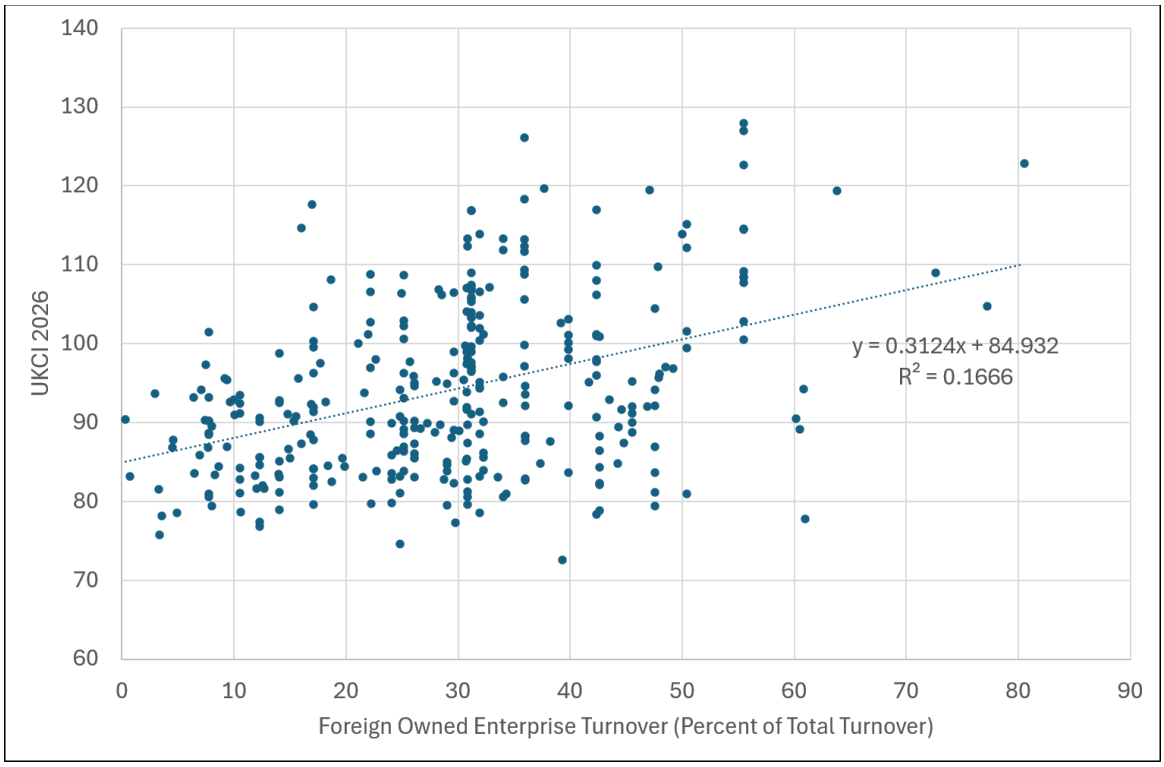


FIGURE 9.03: CORRELATION BETWEEN UKCI 2026 AND FOREIGN-OWNED ENTERPRISE TURNOVER (PERCENTAGE OF TOTAL TURNOVER)



9.2. Foreign-Owned Enterprises and UKCI Sub-Indices 2026

This section considers the correlation between foreign influence measures and the UKCI sub-indices (Table 9.02). All the coefficients are statistically significant and all positive. However, the relative strength of these relationships differs by the measure of foreign influence. We provide figures both including inner London and excluding inner London.

When looking at the proportion of enterprises that are foreign owned, the UKCI Inputs Index has the strongest relationship but only when including the localities in Inner London. The outputs measure has the weakest relationship but the reverse when excluding the Inner London localities. The reason for this switch is that the highly competitive Inner London localities tend to have a very high proportion of enterprises that are foreign owned, but potentially reflecting the vibrant startup culture in these localities,[45] they are relatively smaller as they account for a high but not exceptional level of employment.

[45] Evans, G. L. (2019) 'Emergence of a digital cluster in east London: birth of a new hybrid firm', *Competitiveness Review*, 29 (3), 253-266.

As noted above it is not possible to determine whether competitiveness attracts foreign-owned enterprises, foreign-owned enterprises builds competitiveness, or both. What we do know is that those areas with more foreign-owned enterprises have more abundant resources to create high value outputs. Employment by foreign-owned enterprises is also most strongly related to the UKCI Inputs Index. This could relate to the opportunities for highly remunerated employment in foreign firms attracting resources, particularly skilled labour,[46] but equally that very same labour may continue to attract foreign enterprises to create employment.[47]

It is the UKCI Outputs Index that has the slightly greater correlation with foreign influence as measured by the proportion of turnover attributed to foreign-owned enterprises. As the sub-index includes measures of GVA per capita and labour productivity, and foreign-owned enterprises are traditionally found to be more productive,[48] this relationship makes intuitive sense. However, as with the other measures it is also possible for foreign-owned firms to be attracted to more productive areas by well-functioning institutions.[49]

[46] Martins, P. S. (2011) 'Paying more to hire the best? Foreign firms, wages, and worker mobility', *Economic Inquiry*, 49 (2), 349-363.
Rozen-Bakher, Z. (2017) 'Impact of inward and outward FDI on employment: the role of strategic asset-seeking FDI', *Transnational Corporations Review*, 9 (1), 16-30.

[47] Tsiapa, M. Kallioras, D. Petrakos, G. Rasvanis, E. Adamakou, M. Manetos, P. and Almazán-Gómez, M. Á. (2025) 'The geography of interregional FDI activity in Europe: uneven distribution and determinants', *Spatial Economic Analysis*. doi: 10.1080/17421772.2025.2456185.

[48] Davies, S. W. and Lyons, B. R. (1991) 'Characterising relative performance: the productivity advantage of foreign-owned firms in the UK', *Oxford Economic Papers*, 43 (4), 584-595.
Driffield, N. Sun, K. and Temouri, Y. (2018) 'Investigating the link between foreign ownership and firm performance – an endogenous threshold approach', *Multinational Business Review*, 26 (3), 277-298.
Boghean, C. and State, M. (2015) 'The relation between foreign direct investments (FDI) and labour productivity in the European Union countries', *Procedia Economics and Finance*, 32, 278-285.

[49] Daude, C. and Stein, E. (2007) 'The quality of institutions and foreign direct investment', *Economics and Politics*, 19 (3), 317-344.
Villaverde, J. and Maza, A. (2012) 'Foreign direct investment in Spain: regional distribution and determinants', *International Business Review*, 21 (4), 722-733.

TABLE 9.02: CORRELATION BETWEEN UKCI SUB-INDICES 2026 AND FOREIGN OWNERSHIP MEASURES

		Foreign-Owned Enterprises	Employment by Foreign-Owned Enterprises	Turnover from Foreign-Owned Enterprises
Including Inner London	Inputs index	0.615 (0.000)	0.422 (0.000)	0.407 (0.000)
	Outputs index	0.539 (0.000)	0.363 (0.000)	0.417 (0.000)
	Outcome index	0.552 (0.000)	0.351 (0.000)	0.403 (0.000)
Excluding Inner London	Inputs index	0.431 (0.000)	0.377 (0.000)	0.329 (0.000)
	Outputs index	0.535 (0.000)	0.337 (0.000)	0.391 (0.000)
	Outcome index	0.412 (0.000)	0.280 (0.000)	0.323 (0.000)

Notes: Foreign-owned enterprises measured as a percentage of total enterprises; Employment by Foreign-Owned Enterprises measured as a percentage of total employment; Turnover from Foreign-Owned Enterprises measured as a percentage of total turnover; foreign-owned enterprises measures all captured at the unitary authority and county level and the value applied to all constituent local authority district areas in two-tier areas. Westminster and the City of London excluded from all calculations; p-values in parentheses.

Figures 9.04 to 9.06 below show the relationship between the first foreign influence measure based on the proportion of enterprises that are foreign owned and each of the sub-indices of the UKCI. This time we retain the Inner London localities to illustrate how these atypical areas skew the distribution of resources, outputs, and outcomes.

Figure 9.04 shows the positive correlation between foreign ownership and the resources present. The high levels of foreign ownership and greater levels of resources in some of the Inner London localities can be seen as partly driving this relationship, where the trend line sees around 38 percent of the variation explained (R^2 = 0.378). Excluding the Inner London localities sees the proportion of variation in competitiveness explained by the equation halves to under 19 percent (R^2 = 0.186).

Interestingly, the impact of the Inner London localities is less pronounced when considering the relationship between the UKCI Outputs Index and foreign-owned enterprises. This reflects there being other localities with high UKCI Outputs Index scores, but less extreme levels of foreign enterprise ownership. Examples of such localities are Rushmoor (UKCI Outputs Index = 167.7) and Runnymede (UKCI Outputs Index = 166.4), both in the South East. While they both have high levels of UKCI Outputs Index they have only 2.6 percent and 2.0 percent of enterprises that are foreign owned compared to the Inner London localities level of 5.9 percent. This means that when including the Inner London localities the trendline explains nearly 30 percent of variation in UKCI Outputs Index scores (R^2 = 0.290), and excluding them barely changes this (R^2 = 0.286). This contrasts with the halving seen for the UKCI Inputs Index.

The UKCI Outcomes Index and percent of enterprises that are foreign owned provides a similar picture to that for the UKCI Outputs Index. Although a positive relationship is present, as shown in Table 9.02 above when excluding Inner London, it is strengthened by the presence of these localities with extreme levels of foreign enterprise ownership. Figure 9.06, however, also shows that the relationship is far from perfect whereby localities with much lower levels of foreign enterprise ownership also generate high level outcomes for their populations. Particular examples of this are Three Rivers (UKCI Outcomes Index = 118.4; Foreign Enterprise Ownership = 1.6 percent), Stratford-on-Avon (UKCI Outcomes Index = 112.9; Foreign Enterprise Ownership = 2.0 percent), Stevenage (UKCI Outcomes Index = 112.7; Foreign Enterprise Ownership = 1.6 percent), Mole Valley (UKCI Outcomes Index = 112.4; Foreign Enterprise Ownership = 2.0 percent), and Ribble Valley (UKCI Outcomes Index = 112.2; Foreign Enterprise Ownership = 0.8 percent). These localities are spread throughout the English regions with, for example, Stratford-on-Avon in the West Midlands, Ribble Valley in the North West, Stevenage and Three Rivers in the East of England, and Mole Valley in the South East. None of the localities are parts of the largest conurbations, but many residents may work in neighbouring large urban areas, while enjoying the natural amenities available.

FIGURE 9.04: CORRELATION BETWEEN UKCI INPUTS INDEX 2026 AND FOREIGN-OWNED ENTERPRISES (PERCENTAGE OF TOTAL ENTERPRISES)

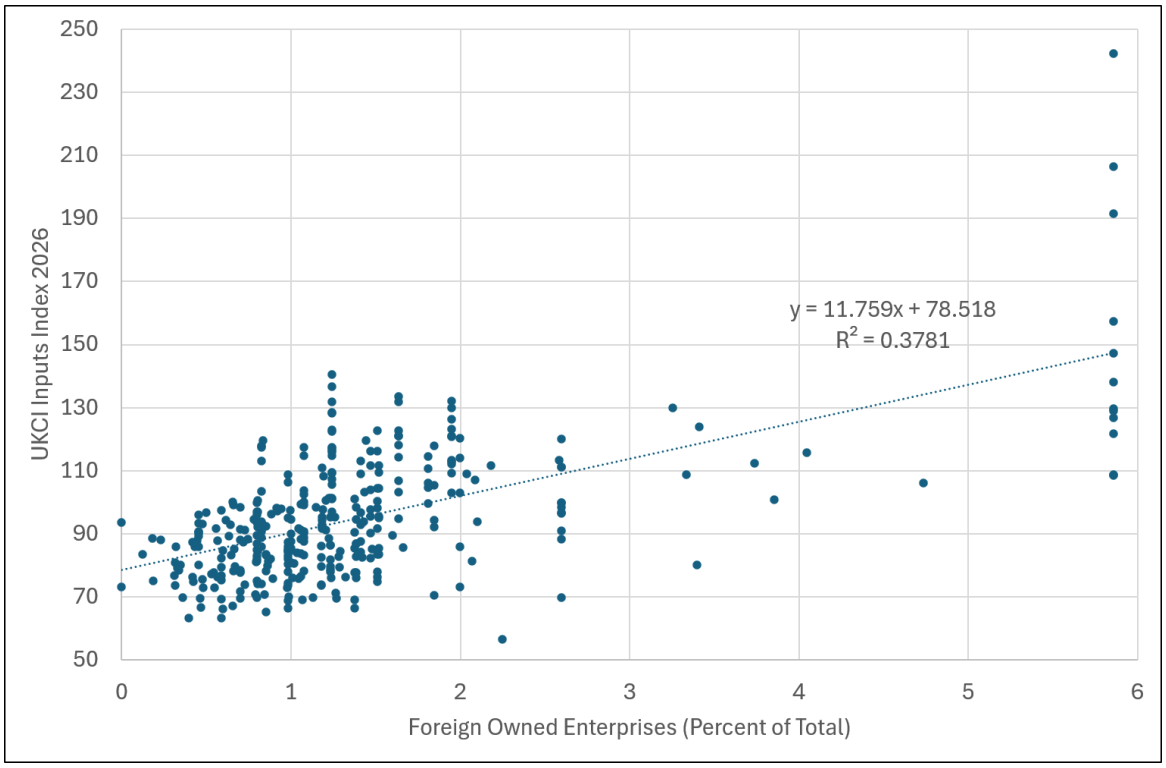


FIGURE 9.05: CORRELATION BETWEEN UKCI OUTPUTS INDEX 2026 AND FOREIGN-OWNED ENTERPRISES (PERCENTAGE OF TOTAL ENTERPRISES)

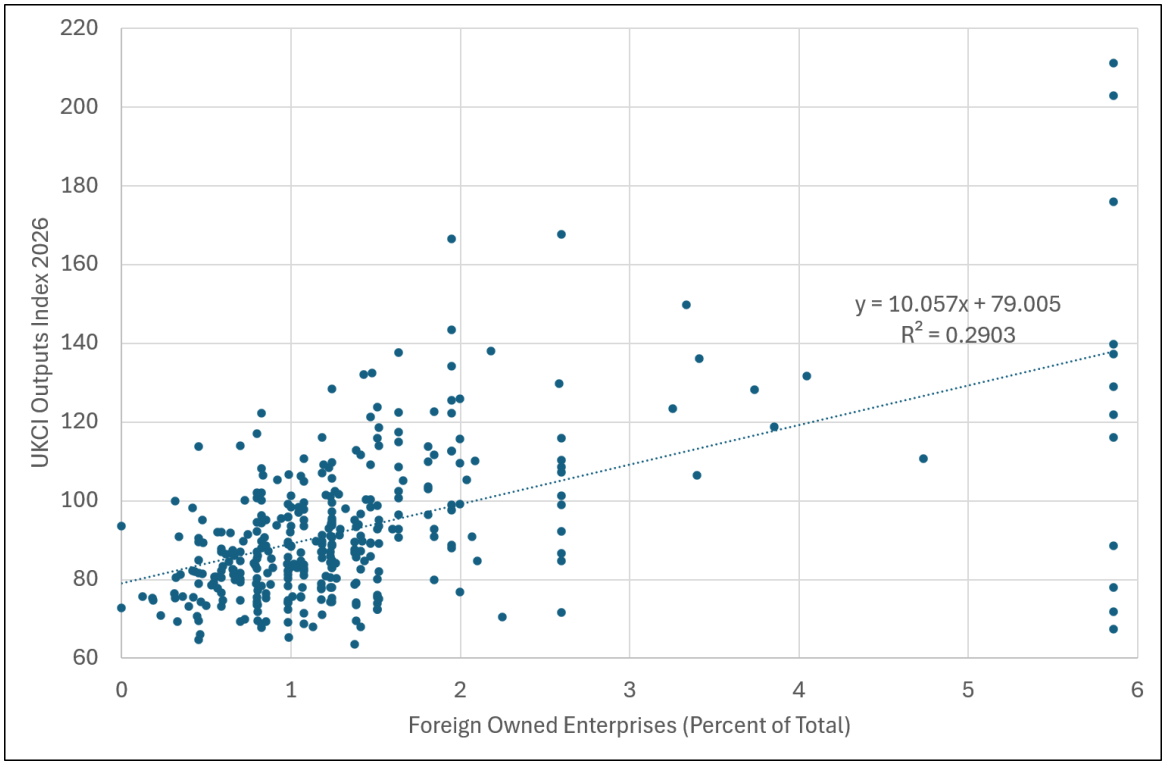
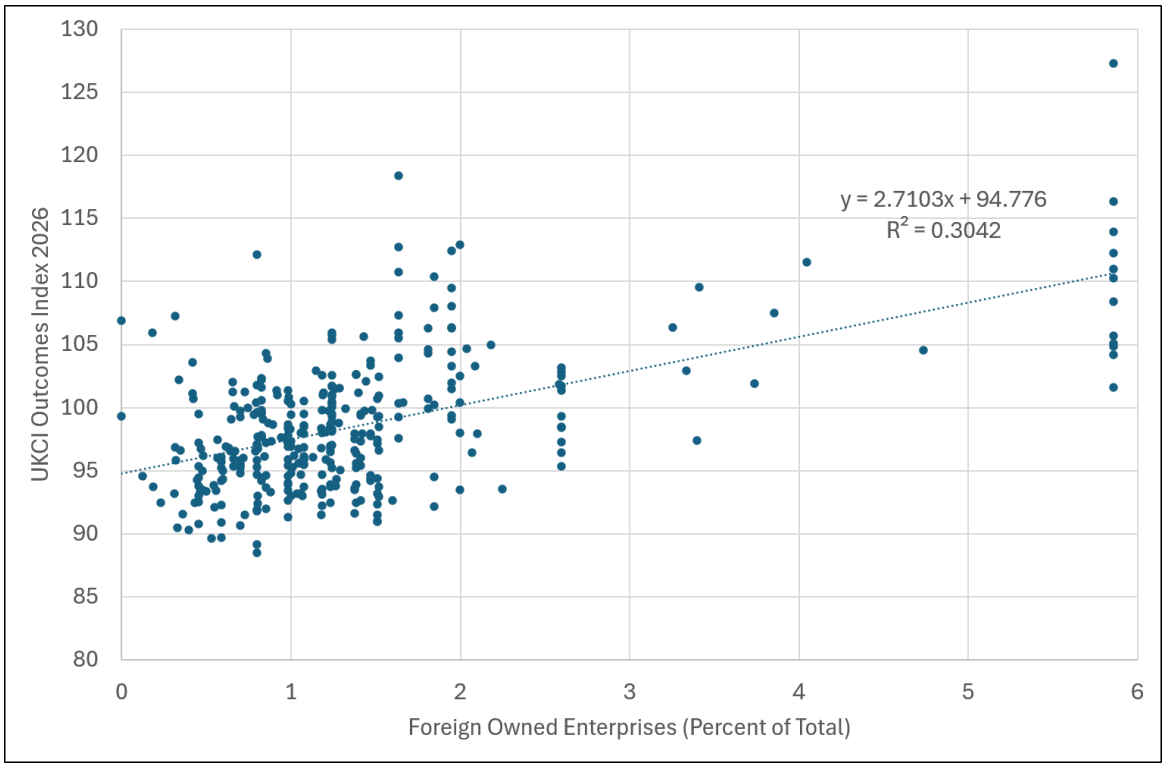


FIGURE 9.06: CORRELATION BETWEEN UKCI OUTCOMES INDEX 2026 AND FOREIGN-OWNED ENTERPRISES (PERCENTAGE OF TOTAL ENTERPRISES)



9.3. Competitiveness and Foreign Influence: Summary

This section examines relationships between competitiveness and foreign influence as captured by the presence of foreign-owned enterprises, the employment they create, and the turnover they generate. The analysis finds that not only is the overall UKCI positively correlated with all measures of foreign influence, so are the sub-indices. This is the case whether or not the localities with more extreme competitiveness or foreign influence measures are excluded. As noted above, correlations do not represent causation and based on existing theory it is likely that competitiveness and foreign influence both affect one another in a virtuous circle.

The stronger relationships are generally, though not universally found, between the UKCI Inputs Index and foreign influence. This is understandable where foreign firms are attracted to those localities with the most resources available, but also then draw in human and financial capital seeking higher rewards.

The relationships also tend to be stronger when the foreign influence measure is based on the percentage of enterprises which are foreign owned, rather than their contribution to local employment and turnover. This would be consistent with work that has noted the importance of entrepreneurial ecosystems with strong networks of entrepreneurs and other key actors rather than the traditional branch plant employer.[50]

Further work will be required to more fully establish causal relations, but based on existing knowledge and the relationships found here, policies seeking to attract foreign direct investment are likely to have a positive effect on competitiveness. However, interventions are likely to require much greater state support in less competitive localities. There is also a need to carefully consider the nature of the foreign investments with potentially a greater number of smaller more knowledge-intensive enterprises having a more positive impact on competitiveness than a single larger employer. Recent geopolitical shocks, particularly those relating to international trade relationships, could also make any employment created precarious.

[50] Huggins, R. Kitagawa, F. Prokop, D. Theodoraki, C. and Thompson, P. (eds.) (2024) *Entrepreneurial Ecosystems in Cities and Regions: Emergence, Evolution, and Future*, Oxford: Oxford University Press.

10. Forecasting Growth with the UKCI

Input or process competitiveness assesses the potential of a locality to provide a high level of living standards for its residents on an on-going basis. This means that the UKCI will provide an insight into those localities with the greatest potential to generate high value jobs and production in the future.

This section of the report uses these insights to forecast the economic growth of localities in Great Britain. As the growth of localities will be bound up with the national and global economic prospects a single forecast would provide a false measure of accuracy. Rather we consider four different scenarios based on previous economic conditions.[51] Appendix 2 provides more detail of the method used, but in simple terms we consider how the UKCI sub-indices at the start of each period affected the subsequent growth of localities during the period. Using this insight, we can estimate how localities will grow depending on macroeconomic conditions, i.e. boom, bust or recovery. The figures used are based on the UKCI for 2026 and the estimated growth figures for all localities are available in Appendices 5 and 6.

In the UKCI 2023 report we noted that the circumstances were quite unique and it was difficult to predict which of our scenarios would be most appropriate for the next few years. This has proved to be the case with fresh macroeconomic shocks caused by increasing geopolitical uncertainty. Trade and military interventions from the US have threatened to make the 'bust' scenario the most relevant on a regular basis, but with the world having adapted to the energy crisis caused by Russia's war in Ukraine, the recovery scenario would appear most appropriate if the US were to declare a longer lasting peace both militarily and with regard to trading relations.

As we are most interested in changes in living standards, we concentrate on growth in GVA per capita rather than growth in GVA. The first measure better captures the share of income generated within the locality enjoyed by each resident, whereas growth in GVA might be driven by inward migration and might result in little benefit to the existing population. Of course, it must be noted that GVA per capita is an average, and even with this measure some residents are likely to benefit to a much greater extent than others. Forecasts using the UKCI 2026 figures for growth of GVA for all localities are available in Appendix 5 and figures for growth of GVA per capita for all localities can be found in Appendix 6. We exclude the City of London and Westminster from the analysis as they are highly atypical, and are first and second in all the forecasts by a large margin.

[51] These are based on the 'boom' period prior to the Global Financial Crisis, the 'bust' of the Financial Crisis period itself, the 'recovery' characterised by limited productivity gains after the Financial Crisis, and the longer-run pattern over all these periods.

10.1. GVA per Capita Growth in the Long-Run Scenario

Under the long-run scenario, the ten localities expected to display the fastest rates of growth in GVA per capita are largely located in London (Table 10.01), with seven of the top ten being located in the capital. However, it is interesting that the remaining three are not only located in the next most competitive regions of the South East and East of England, but in Stratford-on-Avon we have a representative from the West Midlands. With its strong tourism-based economy this locality is perhaps atypical of the other localities in the West Midlands. Camden in London is the locality with the fastest predicted growth at 7.71 percent per annum, and has a rate which is more than double that of the 10th fastest growing locality.

TABLE 10.01: TOP 10 FASTEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (LONG-RUN SCENARIO)

Rank	Locality	Region	Annual Growth Rate
1	Camden	London	7.71
2	Islington	London	6.36
3	Tower Hamlets	London	6.14
4	Hackney	London	5.44
5	Three Rivers	East of England	4.53
6	Hammersmith and Fulham	London	4.43
7	Kensington and Chelsea	London	3.86
8	Mole Valley	South East	3.84
9	Southwark	London	3.73
10	Stratford-on-Avon	West Midlands	3.55

Table 10.02 similarly highlights the extent that the fastest growing localities do not represent the typical locality's likely experience of growth in GVA per capita in future years. This table presents the slowest growing localities based on the estimates from the UKCI 2026 figures. All of these localities are expected to not just stagnate, but actually see a slight fall in GVA per capita over time. This would very much fit with the experience of the UK economy over the past few years with growth on average low compared to the period before the Financial Crisis, and the recovery afterwards but before Brexit. Given this slower overall growth, it is understandable that the weaker localities will on average see living standards fall.

A majority of these localities are found in the Midlands, North of England and Wales, as might be expected. The Isle of Wight in the South East is also present. This shows the importance of considering not just regional inequality, but inequality within regions. As discussed in Section 8 it is important that greater devolution comes with a focus on the combined authorities as a whole, and they do not become the UK in microscale with the leading urban service centres becoming more competitive and growing more quickly at the expense of the hinterlands.

The potential for this was highlighted by considering Greater Manchester, where Manchester itself is seen as a success story (see sub-sections 6.1 and 6.3), but as a combined authority there are less competitive localities found within its boundaries. Although outside Greater Manchester's boundaries, Burnley (contracting GVA per capita of -0.80 percent per annum) and Pendle (-0.48 percent) are closely located and not gaining necessarily from their neighbour's success.

TABLE 10.02: 10 SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES (LONG-RUN SCENARIO)

Rank	Locality	Region	Annual Growth Rate
338	Pendle	North West	-0.48
339	Blackpool	North West	-0.54
340	Isle of Wight	South East	-0.59
341	South Holland	East Midlands	-0.59
342	Sunderland	North East	-0.63
343	Boston	East Midlands	-0.64
344	East Lindsey	East Midlands	-0.65
345	Blaenau Gwent	Wales	-0.67
346	Burnley	North West	-0.80
347	Merthyr Tydfil	Wales	-0.90

Table 10.03 highlights that London has the widest range of predicted growth rates for GVA per capita across its localities. Bexley is estimated to be the slowest growing locality (0.97 percent), which is less than a seventh of that of the fastest growing locality, Camden (7.71 percent). The North East has the smallest range, which is a reflection of the lower growth rates expected across the region. Sunderland is expected to see the largest fall in GVA per capita at a rate of 0.63 percent per year, but Newcastle, the fastest growing locality according to estimates, is only growing at a rate of 0.72 percent annually. Wales provides another interesting example: the fastest growing rate of GVA per capita is estimated to be in Monmouthshire (1.61 percent), and the biggest rate of decline in living standards is expected to be in Merthyr Tydfil (-0.90 percent). That both are located in the same city region – the Cardiff Capital Region – highlights the continued challenges city regional policymakers are likely to face in coming years.

TABLE 10.03: FASTEST AND SLOWEST PREDICTED GVA PER CAPITA GROWING LOCALITIES IN EACH REGION (LONG-RUN SCENARIO)

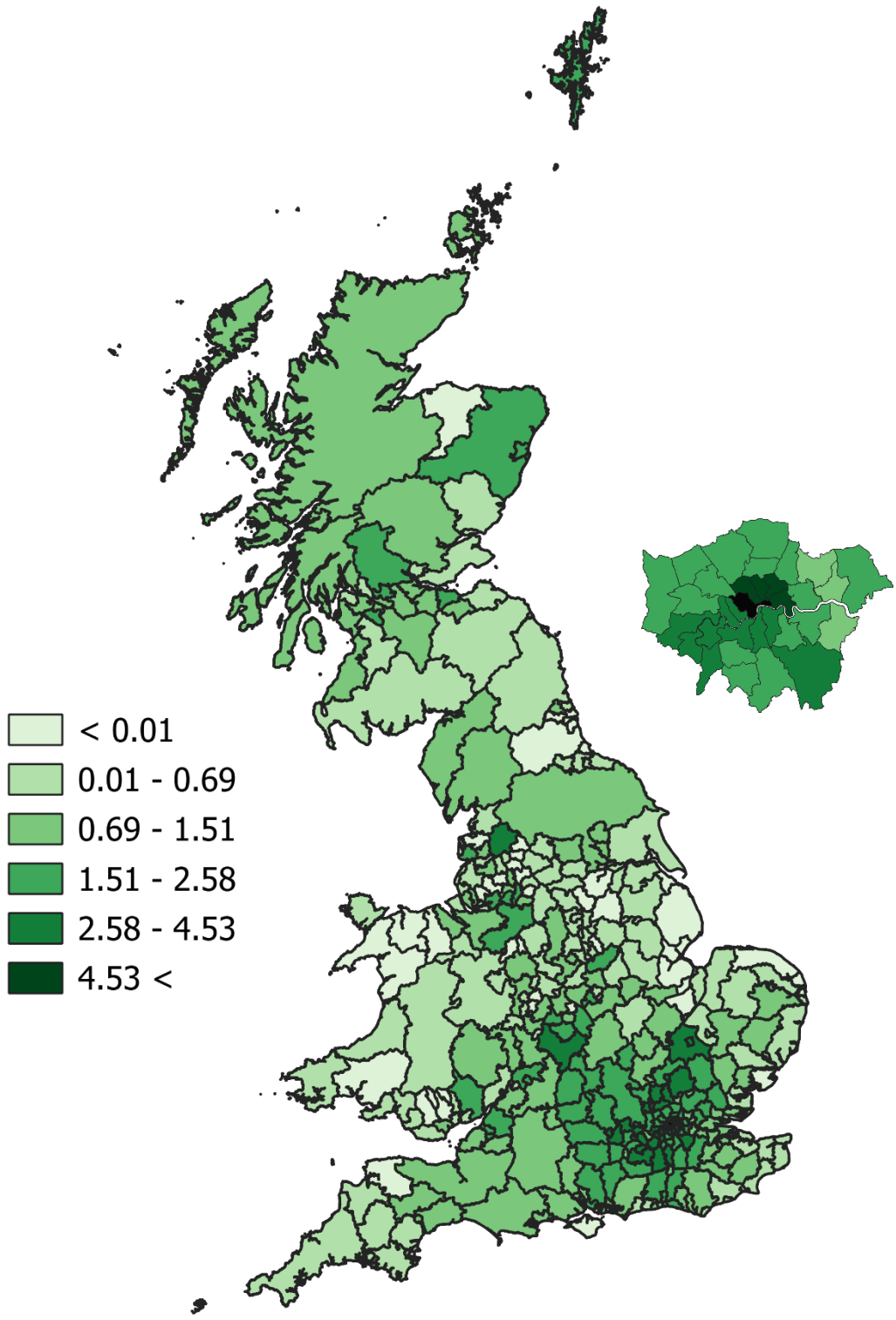
Region	Growth Rank	Locality	Annual Growth Rate
East Midlands	90	Rushcliffe	1.70
	344	East Lindsey	-0.65
East of England	5	Three Rivers	4.53
	337	Fenland	-0.44
London	1	Camden	7.71
	163	Bexley	0.97
North East	197	Newcastle upon Tyne	0.72

North West	342	Sunderland	-0.63
	20	Ribble Valley	3.04
	346	Burnley	-0.80
Scotland	35	City of Edinburgh	2.43
	314	Moray	-0.12
South East	8	Mole Valley	3.84
	340	Isle of Wight	-0.59
South West	39	Cheltenham	2.35
	333	Torbay	-0.43
Wales	95	Monmouthshire	1.61
	347	Merthyr Tydfil	-0.90
West Midlands	10	Stratford-on-Avon	3.55
	322	Sandwell	-0.20
Yorkshire and the Humber	102	York	1.50
	336	Rotherham	-0.44

Figure 10.01 below presents the geographic distribution of estimated growth. While, as might be expected, there are higher levels of growth in and around the global financial centre of Greater London, there are also areas in other regions predicted to grow more rapidly in the future. Manchester and some of the neighbouring localities are good examples of this. These not only include localities within the Greater Manchester Combined Authority, but those beyond the border, such as Cheshire East. Stratford-on-Avon may provide a West Midlands equivalent, Stirling in Scotland, and Monmouthshire in Wales, similarly. It will be interesting to see to what extent greater hybrid working allows these areas outside the city knowledge centres to continue to grow.

Other examples of growth come from the university knowledge centre of Cambridge and the surrounding locality of South Cambridgeshire, and Aberdeen with its specialism in oil, with Aberdeenshire also appearing to benefit. Interestingly the remote Shetland Islands in Scotland are identified as a locality which will experience higher rates of growth. The Shetland Islands, like Aberdeen, have benefited from the North Sea oil industry but only have a UKCI of 95.6. This reflects a low UKCI Inputs Index of 80.9 in particular, but this is offset by an UKCI Outcomes Index of 107.3. In general, high rewards with regard to low unemployment (1.3 percent compared to a UK average of 3.8) and higher pay (£859.1 per week compared to a UK average of £766.6) may attract more resources in the future. With changing working patterns, it is also possible that the Shetland Islands' location may also be less of a drag on their growth in the future.

FIGURE 10.01: LOCAL AUTHORITY GVA PER CAPITA PREDICTED GROWTH – PERCENT PER ANNUM (LONG-RUN SCENARIO)



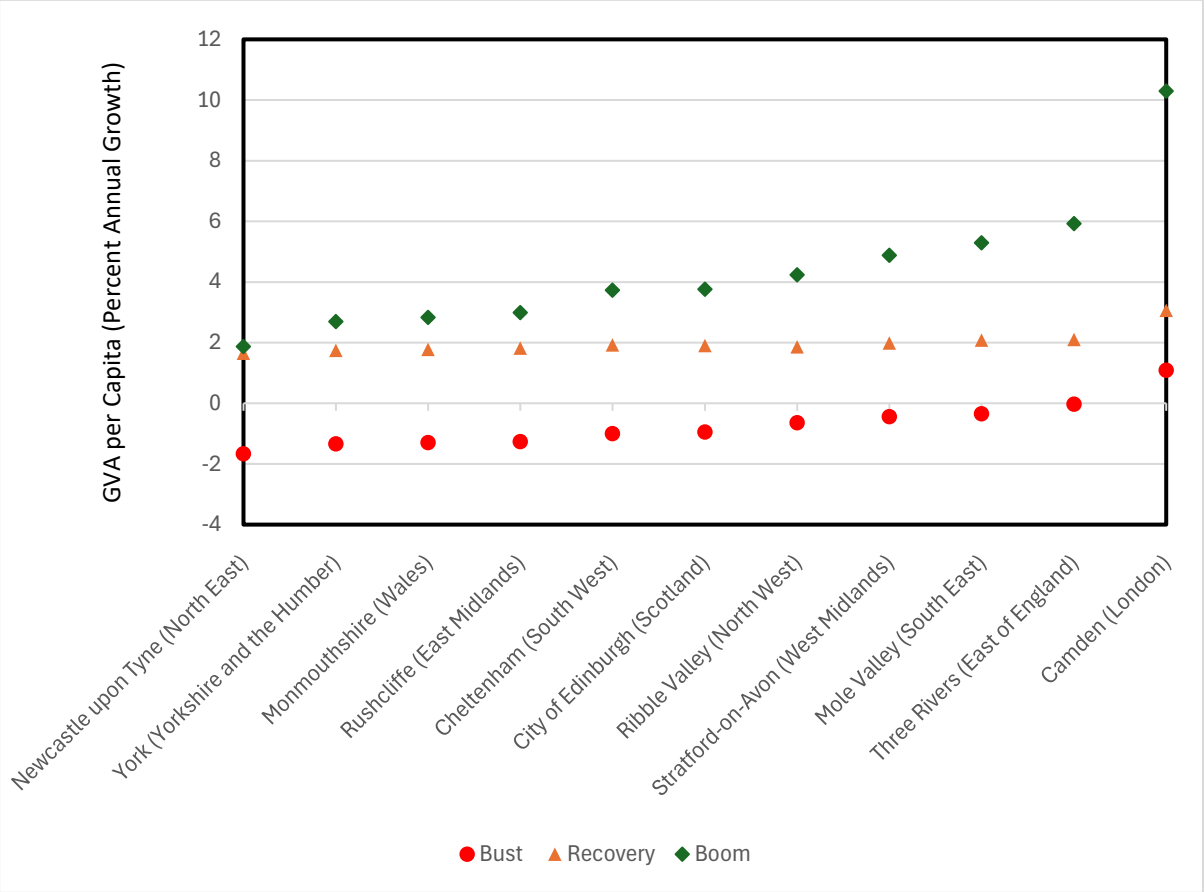
10.2. Comparisons of Growth Predictions of GVA per Capita by Scenario

As well as the long-run growth forecasts, three other scenarios are used to estimate growth of GVA per capita. Although the rankings do not necessarily change greatly between these scenarios there are some differences. A much larger change, however, can be detected in the absolute growth rates. As noted above, the last few years have seen the UK and other economies largely flip between conditions most closely associated with the recovery scenario and the bust scenario. The latter has tended to occur when the US has undertaken aggressive actions against others either via trade restrictions or military action, and has then dissipated when court rulings or other negotiations have resulted in one kind of peace or another.

In this sub-section we briefly consider the relative outcomes for those localities identified in sub-section 10.1 as being the fastest and slowest growing in each of the regions. Figure 10.02 presents the outcomes for the strongest performing localities in each region. We suspect that if the geopolitical shocks were to abate the recovery scenario would probably be most consistent with the underlying conditions. This scenario produces the least variation between the fastest growing localities from each region. The outcomes range from 1.66 percent annually for Newcastle upon Tyne (North East) to 3.07 percent annually for Camden (London).

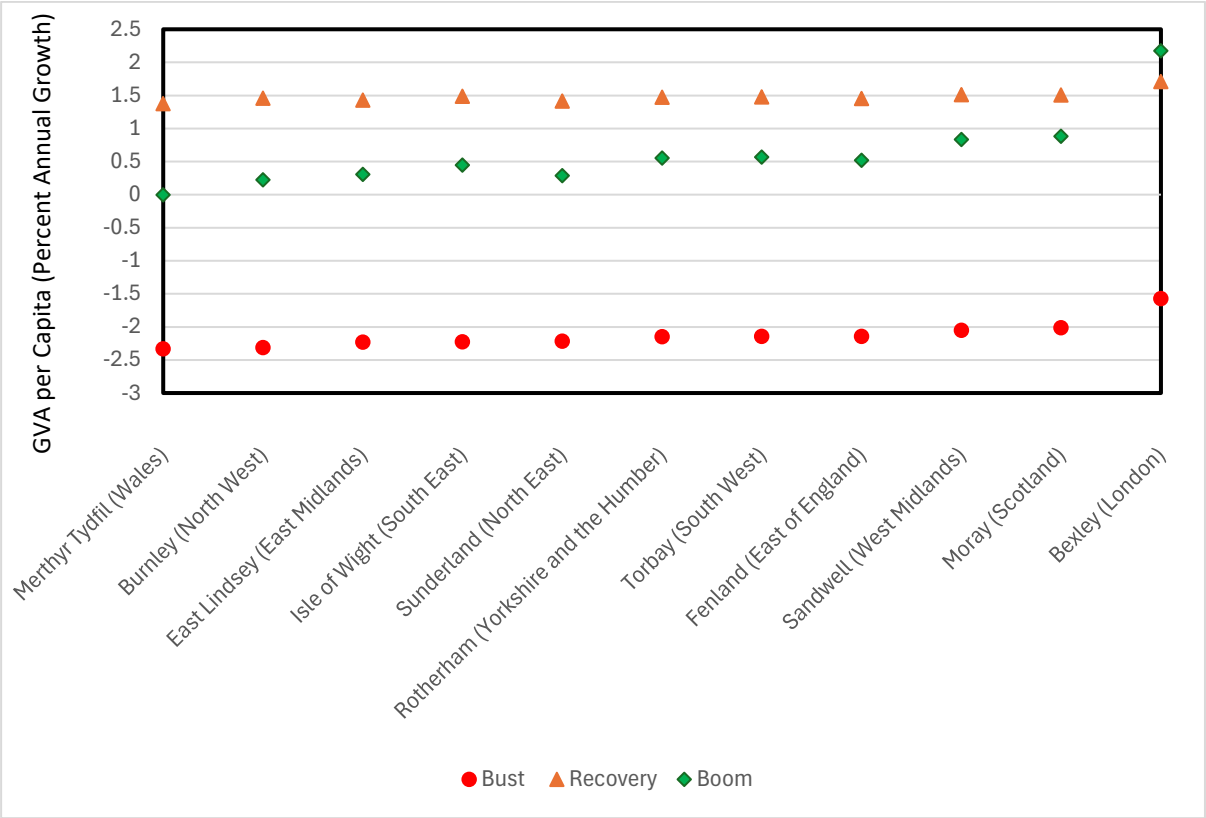
The bust scenario generates a greater range of estimated growth rates of GVA per capita. In this scenario Newcastle upon Tyne sees an annual decline of 1.67 percent, whereas Camden grows by 1.10 percent each year. This highlights that during periods of recovery all localities tend to perform relatively well, and the least competitive localities are not left as quickly behind relatively in terms of improving living standards, but during downturns these already less prosperous areas suffer the greatest setbacks.

FIGURE 10.02: GVA PER CAPITA PERCENT ANNUAL GROWTH BY SCENARIO – FASTEST GROWING LOCALITIES FOR EACH REGION



For the least competitive localities in each region whether it is a bust or recovery scenario has relatively little effect on the scenario rankings as either all grow at just below or above 1.5 percent annually (recovery) or all experience a decline of around 2 to 2.5 percent (bust) (Figure 10.03). The exception is that the London locality of Bexley in the bust scenario only sees GVA per capita fall by 1.57 percent. This indicates that across all regions of Great Britain there are less competitive localities that perform in a similar fashion to one another, and generally fall behind both the most competitive localities in their own region and Great Britain as a whole. It is this inequality that greater devolution will hope to address in years to come.

FIGURE 10.03: GVA PER CAPITA PERCENT ANNUAL GROWTH BY SCENARIO – SLOWEST GROWING LOCALITIES FOR EACH REGION



11.Conclusions: Uncertainty and Devolution

This report has analysed the competitiveness of localities, cities and regions across Great Britain. This has been achieved through examining the performance of these places based on a basket of economic indicators that measure the capability and capacity to grow economically. All the data used in the main measures of this report now relate to the period after the lifting of restrictions associated with the COVID-19 pandemic. However, this period has been characterised by economic shocks associated with Russia's invasion of Ukraine and interventions by one of the UK's traditionally most important trading partners, the USA.

These shocks have combined with a period of rapid change in working patterns and employment as the workforce has not returned to a traditional five days in the office, but continued to work from home more often. The rise of artificial intelligence (AI) as a work tool will also be starting to influence employment within some occupations both potentially positively due to productivity gains, and negatively where roles become redundant.

Domestically, the UK Government has changed from a Conservative administration to a Labour one. When including the UKCI 2022 figures as well as those for 2026 this means that five different prime ministers have held office in the period covered by this report.[52] There remains a focus on achieving a more even distribution of prosperity across the country, but with 'levelling up' being replaced by 'rewiring the state'. Under the latter there is an emphasis on further accelerating devolution of powers in England.

This report indicates a lower level of ranking changes compared to the previous report in 2023, which is understandable given the inclusion of the COVID-19 period in the previous report. However, the level of change remains greater than was typical in the period prior to COVID-19. This is also understandable given the geopolitical shocks that have induced multiple international trade and energy shocks, and the aforementioned rise of AI - all of which have threatened the success of particular industries and the occupations they support.

London and the South East continue to host the most competitive localities, but more rural localities have improved both their UKCI scores and their positions in the rankings. The continuation of hybrid working, particularly those in the knowledge sectors, has seen cities remain key focal points, but now often coordinating resources located more broadly. However, this also means that smaller urban locations outside the knowledge hubs continue to experience declining competitiveness. Often these localities remain dependent on the UK's remaining manufacturing specialisms, which have often been hit hardest by the energy shocks of the last few years.

[52] Boris Johnson (2019 – 2022); Liz Truss (2022); Rishi Sunak (2022 – 2024); Keir Starmer (2024 – 2026); Andy Burnham (2026 – present).

The ambition to increase accountability through greater devolution of powers to combined authorities in theory can help with the convergence of competitiveness that is noted in this report. However, it relies upon being sufficiently resourced and with sufficient political stability to allow longer term planning. For many combined authority areas, they face the same issue as the UK as a whole, but on a smaller scale, supporting their strengths while addressing their weaknesses. Even combined authorities such as Greater Manchester and the West Midlands, which are almost entirely urban in nature, have less and more competitive localities.

For combined authorities such as the East Midlands Combined County Authority with two major urban areas specialising in different activities (Derby – manufacturing; Nottingham – services), and relatively large more rural areas, the competing demands make success far from guaranteed. A similar story can be found in the devolved nations with areas such as Cardiff Capital Region combining larger urban areas, old industrial areas based around extractive industries, and more rural agricultural focused economies.

The growth estimates based on the UKCI raise another question: are the boundaries of the combined authorities more closely aligned with functional economic areas than some of their predecessors? With continuing patterns of working from home, it appears that not only are there higher growth rates associated with some of the more competitive combined authorities, but also in the more rural areas surrounding them. There have always been patterns of commuting into larger urban areas, but now with the commute often not having to take place everyday this means a greater share of a 'city's labour force' may choose to live further afield.

The UKCI has long identified that a focus on regional inequality, and a desire to 'level up' with London and the South East may hide the fact that considerable inequality is present within all regions of Great Britain. A push for greater devolution in theory allows planning to take place at a level where this can be recognised more fully. However, devolution still comes with its own risks in terms of how resourcing of combined authorities is organised.

Allowing more resources from tax revenues to be retained in a combined authority will incentivise initiatives that improve the welfare of residents on average. However, it also comes with the issue that combined authorities will face trade-offs where a project may bring greater tax revenues, but largely benefit specific groups of workers and areas in the combined authority against broader inclusive growth. Devolution is also envisaged as boosting accountability through the democratic process, but it also connects local economic planning to the political cycle rather than for the longer term.

In summary, the UKCI suggests that there are positive signs from early devolution, but more broadly any convergence in competitiveness seems to be related to social, technological and economic changes often coming from international sources rather than previous governments' efforts.

Appendix 1: Testing for Convergence and Divergence

In Section 5 we consider evidence that the competitiveness of localities in Great Britain is changing its distribution over time. Specifically, we consider evidence to examine whether or not disparities between the less competitive localities and the most competitive are declining, i.e. the localities are converging in terms of competitiveness. Alternatively, there may be evidence of the opposite pattern whereby the localities become less similar in terms of their competitiveness. There are a number of approaches that can be used to investigate this. We consider two approaches that are used in the literature to understand whether the growth rates of areas (for example localities, regions or countries) are becoming more or less similar, sigma and beta convergence.

Sigma convergence considers whether the spread of competitiveness is becoming greater over time or diminishing. This is achieved by examining the standard deviation of competitiveness scores in different periods ($sd_{comp,t}$). This is based on examining the extent to which the average levels of competitiveness ($Comp_{i,t}$) diverge from the average value for all localities being considered ($\overline{Comp_t}$).

$$sd_{comp,t} = \sqrt{\frac{\sum\left(Comp_{i,t} - \overline{Comp_t}\right)^2}{N}}$$

Squaring and square rooting are required to ensure that the divergence from the mean is considered in absolute terms as it is the distance from the average not the direction which is important. If values were not squared, they would cancel out and sum to zero.

An F-test is used to examine whether or not any change in the standard deviation is statistically significant by considering the ratio of the two variances (square of standard deviation) in time periods $t1$ and $t2$.

$$F = \frac{sd^2_{comp,t1}}{sd^2_{comp,t2}}$$

The resulting F statistic is compared to an F distribution with n_{t1}-1 and n_{t2}-1 degrees of freedom, where n_t is the number of localities in period t. Where the probability of such a difference is found to happen at random with less than a 5 percent probability this is usually regarded as statistically significant. When there is a less than 10 percent probability, but greater than 5 percent probability, this might be regarded as there being weak statistical support.

Any statistical differences will indicate if the spread of competitiveness is declining or increasing over time. However, it does not focus on which localities' changes in competitiveness are causing this. It is theoretically possible for the most competitive localities to experience declines in competitiveness that are so great and the least competitive improve their position to such an extent that they completely switch positions. The overall distribution would not change, just the positions within this distribution of individual localities. This means there would be no evidence of sigma convergence.

Equally the localities at either extreme could maintain their competitiveness levels, so the range of values remain the same, but those in the middle of the distribution could cluster more or less tightly around the mean. In the case of the former this would be identified as sigma convergence, and the latter sigma divergence.

An alternative method of testing for convergence and divergence is beta convergence. In beta convergence tests a regression is run of the following form:

$$\Delta Comp_{i,0-T} = \alpha_0 + \beta_1 Comp_0 + \gamma Controls_i + \varepsilon_i$$

Here the change in competitiveness from one period to another for each locality ($\Delta Comp_{i,0\text{-}T}$) is regressed on the competitiveness of the locality at the beginning of the period ($Comp_0$). The relationship between the starting competitiveness and the change is captured by the coefficient β_1. If those with the lowest competitiveness are catching up they will improve their competitiveness by a greater extent, so β will take a negative value and beta convergence will be present if this coefficient is significantly different from zero. A statistically significant positive value will imply those with greater competitiveness at the start of the period are improving their competitiveness to a greater extent than those with lower competitiveness, so they will be experiencing beta divergence.

We can account for other factors that might affect the change in competitiveness as well as the starting level of competitiveness ($Controls_i$). In this analysis we consider the regions that localities are located within, and whether or not the rural or urban nature of the locality will affect the change in competitiveness. If the beta coefficient remains significantly different from zero after adding such controls, this confirms that beta convergence or divergence is not just a function of their rural/urban nature or the region the localities are located within but is present after accounting for any effect from their nature.

Appendix 2: Forecasting Growth with the UKCI

The overall UK Competitiveness Index is a composite measure of both outcome competitiveness and process/input competitiveness.[53] Outcome competitiveness reflects the ability of a locality to utilise the inputs available to improve the welfare of residents of the locality.[54] Process or input competitiveness considers the resources that are available to utilise to renew and generate favourable outcomes for businesses and residents of the locality thereby taking a more dynamic perspective.[55]

The inclusion of both process and outcome competitiveness dimensions in the UKCI means that it provides an insight into the future progress of a locality's success in terms of the resources available and its current success in converting these into better welfare outcomes for residents. The report utilises this strength of the UKCI to provide forecasts of the future growth of the UK localities. In recognising that growth is in part dependent on external factors - in particular the growth of the national UK economy - a number of scenarios are generated. The analysis focuses on growth of GVA per capita of the locality in preference to growth of GVA as a stronger measure of changes in average standards of living across localities.[56]

The process used to generate the forecasts is to utilise previous UKCI figures and examine the relationship between the input and outcome sub-indices (which capture the resources available and the ultimate ability to generate welfare benefits for the population) and growth in GVA per capita in the following years.[57] Recognising that this relationship may not remain constant for different periods of the business cycle, the relationship is estimated using the following UKCI figures and periods of growth:

UKCI 1997 → GVA per capita growth 1997 – 2007 (boom period)

UKCI 2009 → GVA per capita growth 2007 – 2012 (bust period)

UKCI 2013 → GVA per capita growth 2012 – 2016 (recovery period)

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[53] See for example: Aiginger, K. (2006) 'Competitiveness: from a dangerous obsession to a welfare creating ability with positive externalities', *Journal of Industry, Competition and Trade*, 6 (2), 161-177.

[54] See for example: Kitson, M. Martin, R. and Tyler, P. (2004) 'Regional competitiveness: an elusive yet key concept?', *Regional Studies*, 38 (9), 991-999. Porter, M. (2007) 'Competitiveness implications for central Europe and the Czech Republic', Paper presented in Prague, 22 October.

[55] See for example: Aiginger, K. and Firgo, M. (2017) 'Regional competitiveness: connecting an old concept with new goals', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 155-191. Fratesi, U. (2017) 'The dynamics of regional competitiveness', in R. Huggins and P. Thompson (eds.), *Handbook of Regions and Competitiveness: Contemporary Theories and Perspectives on Economic Development*, Cheltenham: Edward Elgar, pp. 207-231.

[56] https://ig.ft.com/sites/numbers/economies/uk/

[57] The relationship between UKCI figures and GVA per capita growth is established using regression analysis.

UKCI 1997 → GVA per capita growth 1997 – 2013 (long-run estimate)

Each estimate provides a slightly different insight in terms of the period under examination, whether it is pre-Great Recession (boom), Great Recession (bust), or post-Great Recession (recovery), or alternatively a longer-run analysis that covers all three periods to some degree, but excluding data where uneven patterns of the recovery and concerns about Brexit may have led to short-run fluctuations.

We retain the same periods used to estimate the relationships for the scenarios as those used in the 2019 report because of the large fluctuations and uncertainty present in more recent data due to the Brexit decision, COVID-19 pandemic, the brief recovery and cost-of-living crisis from the war in Ukraine which have all affected business decisions with rapid changes in business sentiment over the period. The relationships take the following form:

$$AnnualGrowth_{Y1-YN,i} = \beta_0 + \beta_1 Inputs_{UKCI,i} + \beta_2 Outcomes_{UKCI,i} + \varepsilon_i$$

Where $AnnualGrowth_{Y1\text{-}YN,i}$ is the average GVA per capita growth for the period *Y*1 to *YN* (i.e. 1997 to 2007; 2007 to 2012; 2012 to 2016; or 1997 to 2013) in locality *i*. This is firstly determined by β_0 which is a base level of growth in per capita GVA that would be experienced by a theoretical locality with a UKCI of 0. $Inputs_{UKCI,i}$ and $Outcomes_{UKCI,i}$ are the UKCI Inputs and Outcomes sub-indices for locality *i* at the beginning of the period. The coefficients β_1 and β_2 are estimated and reflect the relationship between GVA per capita growth and the UKCI sub-indices for Inputs and Outcomes respectively. The final term ε is an error term reflecting the fact that other factors beyond the UKCI will influence annual growth during the period that will lead to deviations from the predictions.

The relationships between the UKCI sub-indices and GVA per capita for each period are as summarised below:

TABLE A2.1 - RELATIONSHIP BETWEEN UKCI INPUTS AND OUTCOMES SUB-INDICES WITH GVA GROWTH

Scenario	Period	Input Sub-Index	Outcome Sub-Index
Boom	1997-2007	0.000397	0.001322
Bust	2007-2012	0.000106	0.000611
Recovery	2012-2016	0.000084	0.0000886
Long-run	1997-2013	0.000296	0.001345

The full equations for the estimates are as follows:

Boom

$$AnnualGrowth_{97-07,i} = 0.879 + 0.000397Inputs_{97,i} + 0.001322Outcomes_{97,i} + \varepsilon_i$$

Bust

$$AnnualGrowth_{07-12,i} = 0.931 + 0.000106Inputs_{09,i} + 0.000611Outcomes_{09,i} + \varepsilon_i$$

Recovery

$$AnnualGrowth_{12-16,i} = 1.027 + 0.000084Inputs_{13,i} + 0.0000886Outcomes_{13,i} + \varepsilon_i$$

Long-Term

$$AnnualGrowth_{97-13,i} = 0.870 + 0.000296Inputs_{97,i} + 0.001345Outcomes_{97,i} + \varepsilon_i$$

To produce forecasts from these relationships, current data is taken from the UKCI for 2026 and using the relationships outlined above estimates of GVA and GVA per capita growth are produced.

The overall equations used to estimate each of the scenarios are as follows:

Boom

$$AnnualGrowth_{97-07,i} = \left[\left(\frac{\left(0.879 + 0.000397Inputs_{26,i} + 0.001322Outcomes_{26,i}\right)}{1.051} \times 1.027\right) - 1\right] \times 100$$

Bust

$$AnnualGrowth_{07-12,i} = \left[\left(\frac{\left(0.931 + 0.000106Inputs_{26,i} + 0.000611Outcomes_{26,i}\right)}{1.003} \times 0.986\right) - 1\right] \times 100$$

Recovery

$$AnnualGrowth_{12-16,i} = \left[\left(\frac{\left(1.027 + 0.000084Inputs_{26,i} + 0.0000886Outcomes_{26,i}\right)}{1.044} \times 1.018\right) - 1\right] \times 100$$

Long-Term

$$AnnualGrowth_{97-13,i} = \left[\left(\frac{\left(0.870 + 0.000296Inputs_{26,i} + 0.001345Outcomes_{26,i}\right)}{1.034} \times 1.012\right) - 1\right] \times 100$$

Appendix 3: UKCI in Rank Order

In the table below localities are presented in rank order.

Locality	Region	2022	Rank 2022	2026	Rank 2026
City of London	London	844.9	1	778.7	1
Westminster	London	229.0	2	234.6	2
Camden	London	178.3	3	184.2	3
Islington	London	159.1	4	162.2	4
Tower Hamlets	London	150.5	5	153.8	5
Hackney	London	133.1	6	136.2	6
Hammersmith and Fulham	London	130.9	9	131.7	7
Kensington and Chelsea	London	131.4	8	129.5	8
Runnymede	South East	131.4	7	128.0	9
Mole Valley	South East	117.2	21	126.9	10
Southwark	London	127.3	10	126.2	11
Three Rivers	East of England	123.5	11	126.1	12
Wokingham	South East	121.9	14	122.9	13
Elmbridge	South East	123.4	12	122.7	14
Windsor and Maidenhead	South East	123.3	13	119.6	15
Reading	South East	116.5	23	119.5	16
Slough	South East	120.6	15	119.3	17
Lambeth	London	119.2	17	118.8	18
Hertsmere	East of England	118.3	18	118.3	19
City of Edinburgh	Scotland	115.7	26	117.7	20
Rushmoor	South East	117.2	20	117.0	21
Richmond upon Thames	London	119.7	16	116.9	22
Hounslow	London	117.5	19	116.9	23
Warwick	West Midlands	113.3	30	115.2	24
West Berkshire	South East	116.3	24	114.6	25
Guildford	South East	114.2	28	114.5	26
Reigate and Banstead	South East	114.5	27	114.5	27
Brentwood	East of England	116.6	22	113.9	28
Milton Keynes	South East	115.8	25	113.8	29

Locality	Region	2022	Rank 2022	2026	Rank 2026
South Cambridgeshire	East of England	111.1	37	113.3	30
Manchester	North West	110.1	44	113.3	31
Welwyn Hatfield	East of England	111.4	34	113.2	32
Trafford	North West	109.7	48	112.4	33
Watford	East of England	110.7	39	112.3	34
Stratford-on-Avon	West Midlands	110.9	38	112.1	35
Cambridge	East of England	112.3	31	111.8	36
St Albans	East of England	113.5	29	111.6	37
Winchester	South East	110.7	40	109.9	38
South Gloucestershire	South West	110.5	41	109.8	39
North Hertfordshire	East of England	107.7	53	109.4	40
Surrey Heath	South East	110.4	43	109.2	41
Kingston upon Thames	London	109.8	47	109.0	42
Bracknell Forest	South East	112.0	32	108.9	43
Cotswold	South West	108.0	51	108.8	44
East Hertfordshire	East of England	105.9	63	108.7	45
Sevenoaks	South East	104.6	73	108.7	46
Woking	South East	110.5	42	108.5	47
Waverley	South East	108.4	50	108.4	48
Brighton and Hove	South East	110.0	45	108.1	49
Hart	South East	111.6	33	108.0	50
Spelthorne	South East	111.2	35	107.8	51
South Oxfordshire	South East	106.4	59	107.4	52
Hillingdon	London	105.5	65	107.4	53
Buckinghamshire	South East	107.7	54	107.1	54
Aberdeen City	Scotland	105.3	66	107.1	55
Vale of White Horse	South East	111.1	36	106.9	56
Wandsworth	London	107.5	56	106.9	57
Warrington	North West	106.3	60	106.9	58
Merton	London	109.1	49	106.7	59

Locality	Region	2022	Rank 2022	2026	Rank 2026
Cheltenham	South West	105.3	67	106.5	60
Epping Forest	East of England	106.4	58	106.5	61
Bromsgrove	West Midlands	102.8	81	106.5	62
Bristol, City of	South West	105.9	64	106.4	63
Basingstoke and Deane	South East	107.7	52	106.2	64
Cheshire East	North West	106.1	62	106.1	65
Oxford	South East	109.9	46	105.8	66
Barnet	London	106.2	61	105.7	67
Dacorum	East of England	103.3	77	105.6	68
Harrow	London	105.1	70	105.3	69
Swindon	South West	106.4	57	104.7	70
Ribble Valley	North West	103.9	75	104.6	71
Solihull	West Midlands	107.7	55	104.5	72
Blaby	East Midlands	104.8	72	104.1	73
Bromley	London	104.4	74	104.0	74
Uttlesford	East of England	105.1	69	103.6	75
Cherwell	South East	102.6	85	103.3	76
Ealing	London	103.7	76	103.3	77
Worthing	South East	102.0	94	103.1	78
Tunbridge Wells	South East	102.3	88	102.9	79
Epsom and Ewell	South East	100.8	103	102.8	80
Tewkesbury	South West	102.6	84	102.7	81
Cheshire West and Chester	North West	98.4	123	102.6	82
West Oxfordshire	South East	101.4	95	102.3	83
Tonbridge and Malling	South East	103.1	79	102.3	84
Brent	London	104.9	71	102.2	85
Croydon	London	105.2	68	102.1	86
Chelmsford	East of England	102.1	92	101.9	87
Rugby	West Midlands	101.4	96	101.5	88
Exeter	South West	99.4	114	101.5	89

Locality	Region	2022	Rank 2022	2026	Rank 2026
Leeds	Yorkshire and the Humber	102.1	93	101.2	90
Eastleigh	South East	102.9	80	101.2	91
York	Yorkshire and the Humber	102.7	83	101.2	92
Horsham	South East	101.2	100	101.0	93
Fareham	South East	98.6	119	101.0	94
Rushcliffe	East Midlands	103.2	78	100.8	95
Dartford	South East	102.2	90	100.6	96
Tandridge	South East	98.5	121	100.5	97
Basildon	East of England	101.2	99	100.4	98
South Ribble	North West	102.6	86	100.3	99
Crawley	South East	102.7	82	100.1	100
Cardiff	Wales	100.6	104	100.0	101
Stevenage	East of England	102.3	89	99.8	102
Glasgow City	Scotland	101.1	102	99.7	103
Enfield	London	100.4	105	99.6	104
Fylde	North West	102.4	87	99.5	105
North Warwickshire	West Midlands	101.3	97	99.4	106
Chichester	South East	94.6	152	99.3	107
Wychavon	West Midlands	97.4	128	99.0	108
Havering	London	98.6	118	98.9	109
North West Leicestershire	East Midlands	99.4	113	98.9	110
Broadland	East of England	98.3	124	98.7	111
Salford	North West	102.1	91	98.2	112
Mid Sussex	South East	100.3	106	98.1	113
Stockport	North West	99.6	110	98.0	114
New Forest	South East	96.7	133	98.0	115
West Northamptonshire	East Midlands	99.7	108	98.0	116
Stirling	Scotland	98.6	117	97.7	117
East Hampshire	South East	99.6	109	97.7	118
Redbridge	London	97.2	130	97.6	119

Locality	Region	2022	Rank 2022	2026	Rank 2026
Thurrock	East of England	98.0	125	97.5	120
Harborough	East Midlands	97.3	129	97.4	121
Southampton	South East	101.3	98	97.3	122
Broxbourne	East of England	95.4	145	97.1	123
Bexley	London	99.8	107	97.1	124
Bournemouth, Christchurch and Poole	South West	96.8	132	97.0	125
Sutton	London	99.6	111	97.0	126
Aberdeenshire	Scotland	95.9	138	97.0	127
Stroud	South West	97.1	131	97.0	128
Haringey	London	97.8	127	96.9	129
West Lothian	Scotland	95.4	146	96.8	130
Waltham Forest	London	94.1	158	96.6	131
Greenwich	London	98.0	126	96.5	132
Maidstone	South East	98.4	122	96.3	133
Preston	North West	93.9	163	96.3	134
Worcester	West Midlands	98.5	120	96.3	135
Newham	London	101.1	101	96.2	136
Monmouthshire	Wales	96.6	134	96.2	137
Test Valley	South East	99.5	112	96.0	138
Wiltshire	South West	95.5	143	95.9	139
Huntingdonshire	East of England	96.6	135	95.8	140
Peterborough	East of England	95.7	140	95.6	141
Bath and North East Somerset	South West	96.2	137	95.6	142
Shetland Islands	Scotland	94.6	151	95.6	143
Westmorland and Furness	North West	92.7	172	95.4	144
Bedford	East of England	94.3	155	95.4	145
Central Bedfordshire	East of England	94.5	153	95.2	146
West Suffolk	East of England	90.9	187	95.2	147
Rochford	East of England	91.0	186	95.1	148
Portsmouth	South East	93.4	166	95.1	149

Locality	Region	2022	Rank 2022	2026	Rank 2026
South Derbyshire	East Midlands	99.1	115	95.0	150
Liverpool	North West	95.7	141	94.9	151
Derbyshire Dales	East Midlands	91.9	177	94.6	152
East Staffordshire	West Midlands	95.5	142	94.6	153
Braintree	East of England	91.7	180	94.6	154
Colchester	East of England	94.7	150	94.3	155
Halton	North West	96.2	136	94.2	156
Coventry	West Midlands	95.1	147	94.2	157
Flintshire	Wales	95.1	148	94.1	158
Newcastle upon Tyne	North East	93.0	169	94.1	159
Hinckley and Bosworth	East Midlands	89.9	203	93.9	160
North Yorkshire	Yorkshire and the Humber	93.9	164	93.7	161
Perth and Kinross	Scotland	94.2	157	93.7	162
Lichfield	West Midlands	94.7	149	93.6	163
Lewes	South East	88.8	222	93.4	164
East Devon	South West	90.6	193	93.2	165
Highland	Scotland	90.9	189	93.2	166
Ashford	South East	94.0	160	93.1	167
Derby	East Midlands	95.9	139	92.9	168
North Somerset	South West	93.9	162	92.9	169
Norwich	East of England	95.5	144	92.8	170
Malvern Hills	West Midlands	94.5	154	92.7	171
Rutland	East Midlands	93.3	167	92.6	172
Dorset	South West	90.2	200	92.6	173
East Cambridgeshire	East of England	94.3	156	92.5	174
South Norfolk	East of England	89.3	211	92.5	175
Medway	South East	92.5	173	92.4	176
Lewisham	London	94.0	159	92.3	177
Herefordshire, County of	West Midlands	88.8	223	92.3	178
Birmingham	West Midlands	92.4	174	92.2	179

Locality	Region	2022	Rank 2022	2026	Rank 2026
Adur	South East	87.9	234	92.1	180
Stafford	West Midlands	90.9	188	92.1	181
Ipswich	East of England	98.8	116	92.0	182
Luton	East of England	94.0	161	92.0	183
Chorley	North West	87.4	242	91.9	184
Melton	East Midlands	91.3	183	91.9	185
Nottingham	East Midlands	90.5	195	91.7	186
Charnwood	East Midlands	93.2	168	91.6	187
Harlow	East of England	92.7	171	91.4	188
West Lancashire	North West	90.0	202	91.3	189
Mid Suffolk	East of England	92.2	176	91.2	190
Wealden	South East	91.0	185	91.1	191
Barking and Dagenham	London	90.4	198	91.0	192
North Lanarkshire	Scotland	87.6	238	91.0	193
East Riding of Yorkshire	Yorkshire and the Humber	90.6	194	91.0	194
Stockton-on-Tees	North East	91.6	181	90.8	195
North Tyneside	North East	90.3	199	90.7	196
Havant	South East	86.9	252	90.7	197
South Kesteven	East Midlands	88.3	231	90.6	198
Falkirk	Scotland	89.7	205	90.5	199
East Renfrewshire	Scotland	87.7	237	90.4	200
South Lanarkshire	Scotland	90.5	196	90.2	201
Orkney Islands	Scotland	92.8	170	90.2	202
South Hams	South West	91.7	179	90.2	203
Amber Valley	East Midlands	88.5	226	90.2	204
Dover	South East	89.5	209	90.2	205
Somerset	South West	90.8	191	90.2	206
North Devon	South West	89.0	217	90.2	207
Calderdale	Yorkshire and the Humber	92.3	175	90.1	208
North Kesteven	East Midlands	88.8	220	90.1	209

Locality	Region	2022	Rank 2022	2026	Rank 2026
Forest of Dean	South West	89.0	218	90.1	210
East Suffolk	East of England	89.3	212	90.0	211
Sheffield	Yorkshire and the Humber	90.7	192	89.9	212
Newport	Wales	89.6	207	89.9	213
Shropshire	West Midlands	89.0	215	89.7	214
Bury	North West	90.8	190	89.7	215
Argyll and Bute	Scotland	89.1	213	89.5	216
Telford and Wrekin	West Midlands	89.7	206	89.4	217
East Dunbartonshire	Scotland	88.1	233	89.4	218
Chesterfield	East Midlands	88.4	228	89.3	219
North Northamptonshire	East Midlands	88.5	227	89.2	220
Canterbury	South East	88.9	219	89.1	221
North Lincolnshire	Yorkshire and the Humber	93.4	165	89.1	222
Redditch	West Midlands	88.7	224	89.1	223
Renfrewshire	Scotland	89.0	216	89.0	224
Wrexham	Wales	88.3	232	88.7	225
Babergh	East of England	86.9	251	88.7	226
Mid Devon	South West	84.1	287	88.6	227
Folkestone and Hythe	South East	91.0	184	88.6	228
Maldon	East of England	90.4	197	88.6	229
Gloucester	South West	87.1	247	88.5	230
Leicester	East Midlands	90.0	201	88.5	231
Teignbridge	South West	87.3	244	88.5	232
Broxtowe	East Midlands	87.6	241	88.3	233
Cannock Chase	West Midlands	87.3	245	88.3	234
South Staffordshire	West Midlands	91.6	182	88.3	235
Clackmannanshire	Scotland	87.1	248	88.2	236
South Ayrshire	Scotland	85.4	267	88.1	237
Moray	Scotland	89.0	214	87.8	238
Lancaster	North West	85.5	265	87.7	239

Locality	Region	2022	Rank 2022	2026	Rank 2026
Tamworth	West Midlands	89.6	208	87.7	240
Scottish Borders	Scotland	87.7	236	87.6	241
Bolton	North West	85.5	263	87.4	242
Southend-on-Sea	East of England	87.6	239	87.4	243
High Peak	East Midlands	89.5	210	87.3	244
East Lothian	Scotland	88.4	229	87.3	245
Wolverhampton	West Midlands	84.8	276	86.9	246
Cumberland	North West	88.7	225	86.9	247
Gravesham	South East	91.8	178	86.9	248
Dundee City	Scotland	88.4	230	86.8	249
Cornwall	South West	87.0	250	86.8	250
Darlington	North East	87.3	243	86.7	251
Midlothian	Scotland	87.0	249	86.4	252
Newark and Sherwood	East Midlands	88.8	221	86.4	253
Swale	South East	86.2	254	86.3	254
Wakefield	Yorkshire and the Humber	85.0	274	86.2	255
Bolsover	East Midlands	85.7	260	86.1	256
Pembrokeshire	Wales	85.9	256	85.8	257
Dumfries and Galloway	Scotland	82.8	298	85.8	258
Lincoln	East Midlands	84.9	275	85.6	259
West Lindsey	East Midlands	87.7	235	85.6	260
Kirklees	Yorkshire and the Humber	84.5	278	85.5	261
Fife	Scotland	85.8	258	85.5	262
Erewash	East Midlands	86.0	255	85.4	263
West Dunbartonshire	Scotland	85.5	264	85.4	264
Oadby and Wigston	East Midlands	84.3	283	85.4	265
Swansea	Wales	87.1	246	85.1	266
Breckland	East of England	84.2	284	85.1	267
Knowsley	North West	85.2	268	85.0	268
Blackburn with Darwen	North West	85.7	259	84.8	269

Locality	Region	2022	Rank 2022	2026	Rank 2026
Angus	Scotland	86.2	253	84.8	270
Wirral	North West	85.4	266	84.6	271
South Holland	East Midlands	89.8	204	84.6	272
Middlesbrough	North East	82.6	302	84.5	273
Ceredigion	Wales	84.4	279	84.4	274
Bridgend	Wales	87.6	240	84.4	275
Bassetlaw	East Midlands	85.6	261	84.3	276
Rother	South East	84.2	285	84.2	277
Pendle	North West	81.2	321	84.1	278
Rossendale	North West	83.3	291	84.1	279
Bradford	Yorkshire and the Humber	84.5	277	83.9	280
Vale of Glamorgan	Wales	85.8	257	83.9	281
Sefton	North West	84.4	281	83.8	282
Thanet	South East	80.2	334	83.8	283
Dudley	West Midlands	84.3	282	83.7	284
Arun	South East	84.4	280	83.6	285
Doncaster	Yorkshire and the Humber	85.1	271	83.5	286
Powys	Wales	82.4	303	83.5	287
Stoke-on-Trent	West Midlands	83.1	293	83.4	288
Denbighshire	Wales	81.6	315	83.4	289
Plymouth	South West	85.0	273	83.2	290
Castle Point	East of England	80.5	327	83.2	291
Gateshead	North East	84.1	288	83.2	292
Na h-Eileanan Siar	Scotland	85.1	270	83.2	293
North East Derbyshire	East Midlands	82.8	295	83.1	294
North Ayrshire	Scotland	84.2	286	83.1	295
Isle of Anglesey	Wales	80.6	326	83.1	296
King's Lynn and West Norfolk	East of England	82.0	310	83.1	297
Wyre	North West	80.8	323	83.0	298
Staffordshire Moorlands	West Midlands	82.8	294	82.9	299

Locality	Region	2022	Rank 2022	2026	Rank 2026
Hastings	South East	81.4	317	82.8	300
Barnsley	Yorkshire and the Humber	80.8	322	82.8	301
Oldham	North West	82.8	296	82.8	302
North East Lincolnshire	Yorkshire and the Humber	82.2	306	82.7	303
Newcastle-under-Lyme	West Midlands	85.5	262	82.6	304
Northumberland	North East	82.2	307	82.5	305
Ashfield	East Midlands	82.4	304	82.3	306
Wyre Forest	West Midlands	82.0	309	82.3	307
Gedling	East Midlands	85.2	269	82.1	308
Torfaen	Wales	81.8	312	82.0	309
Burnley	North West	81.4	318	82.0	310
Carmarthenshire	Wales	82.6	300	81.9	311
Isle of Wight	South East	80.3	332	81.7	312
County Durham	North East	81.2	320	81.6	313
East Ayrshire	Scotland	82.8	297	81.5	314
Rochdale	North West	79.6	335	81.2	315
Sandwell	West Midlands	77.9	340	81.2	316
Great Yarmouth	East of England	82.1	308	81.1	317
Sunderland	North East	82.0	311	81.1	318
Eastbourne	South East	85.1	272	81.1	319
Kingston upon Hull, City of	Yorkshire and the Humber	83.4	289	81.0	320
Torridge	South West	83.3	292	81.0	321
Nuneaton and Bedworth	West Midlands	82.7	299	80.9	322
Gwynedd	Wales	81.7	313	80.9	323
Fenland	East of England	80.5	328	80.6	324
West Devon	South West	80.2	333	80.6	325
Wigan	North West	83.3	290	80.6	326
Rotherham	Yorkshire and the Humber	82.6	301	79.8	327
Caerphilly	Wales	80.7	325	79.7	328
Tameside	North West	80.3	331	79.6	329
Hyndburn	North West	82.3	305	79.6	330

Locality	Region	2022	Rank 2022	2026	Rank 2026
St. Helens	North West	79.6	336	79.5	331
Walsall	West Midlands	81.4	319	79.4	332
Conwy	Wales	80.4	329	79.4	333
North Norfolk	East of England	81.6	316	78.9	334
Mansfield	East Midlands	79.0	337	78.9	335
Blackpool	North West	81.7	314	78.7	336
Neath Port Talbot	Wales	80.3	330	78.6	337
Tendring	East of England	76.5	344	78.6	338
Gosport	South East	75.8	345	78.4	339
Torbay	South West	78.5	339	78.1	340
Rhondda Cynon Taf	Wales	78.7	338	77.8	341
East Lindsey	East Midlands	75.4	347	77.4	342
Redcar and Cleveland	North East	76.7	343	77.3	343
Inverclyde	Scotland	80.7	324	77.0	344
Boston	East Midlands	77.7	341	76.8	345
Hartlepool	North East	77.2	342	75.7	346
Merthyr Tydfil	Wales	73.6	348	75.1	347
South Tyneside	North East	75.5	346	74.6	348
Blaenau Gwent	Wales	72.9	349	72.5	349

Appendix 4: UKCI in Regional Rank Order

In the table below localities are grouped by region and then placed in rank order.

Locality	Region	2022	Rank 2022	2026	Rank 2026
Localities in the East Midlands					
Blaby	East Midlands	104.8	72	104.1	73
Rushcliffe	East Midlands	103.2	78	100.8	95
North West Leicestershire	East Midlands	99.4	113	98.9	110
West Northamptonshire	East Midlands	99.7	108	98.0	116
Harborough	East Midlands	97.3	129	97.4	121
South Derbyshire	East Midlands	99.1	115	95.0	150
Derbyshire Dales	East Midlands	91.9	177	94.6	152
Hinckley and Bosworth	East Midlands	89.9	203	93.9	160
Derby	East Midlands	95.9	139	92.9	168
Rutland	East Midlands	93.3	167	92.6	172
Melton	East Midlands	91.3	183	91.9	185
Nottingham	East Midlands	90.5	195	91.7	186
Charnwood	East Midlands	93.2	168	91.6	187
South Kesteven	East Midlands	88.3	231	90.6	198
Amber Valley	East Midlands	88.5	226	90.2	204
North Kesteven	East Midlands	88.8	220	90.1	209
Chesterfield	East Midlands	88.4	228	89.3	219
North Northamptonshire	East Midlands	88.5	227	89.2	220
Leicester	East Midlands	90.0	201	88.5	231
Broxtowe	East Midlands	87.6	241	88.3	233
High Peak	East Midlands	89.5	210	87.3	244
Newark and Sherwood	East Midlands	88.8	221	86.4	253
Bolsover	East Midlands	85.7	260	86.1	256
Lincoln	East Midlands	84.9	275	85.6	259
West Lindsey	East Midlands	87.7	235	85.6	260
Erewash	East Midlands	86.0	255	85.4	263
Oadby and Wigston	East Midlands	84.3	283	85.4	265
South Holland	East Midlands	89.8	204	84.6	272

Locality	Region	2022	Rank 2022	2026	Rank 2026
Bassetlaw	East Midlands	85.6	261	84.3	276
North East Derbyshire	East Midlands	82.8	295	83.1	294
Ashfield	East Midlands	82.4	304	82.3	306
Gedling	East Midlands	85.2	269	82.1	308
Mansfield	East Midlands	79.0	337	78.9	335
East Lindsey	East Midlands	75.4	347	77.4	342
Boston	East Midlands	77.7	341	76.8	345
Localities in the East of England					
Three Rivers	East of England	123.5	11	126.1	12
Hertsmere	East of England	118.3	18	118.3	19
Brentwood	East of England	116.6	22	113.9	28
South Cambridgeshire	East of England	111.1	37	113.3	30
Welwyn Hatfield	East of England	111.4	34	113.2	32
Watford	East of England	110.7	39	112.3	34
Cambridge	East of England	112.3	31	111.8	36
St Albans	East of England	113.5	29	111.6	37
North Hertfordshire	East of England	107.7	53	109.4	40
East Hertfordshire	East of England	105.9	63	108.7	45
Epping Forest	East of England	106.4	58	106.5	61
Dacorum	East of England	103.3	77	105.6	68
Uttlesford	East of England	105.1	69	103.6	75
Chelmsford	East of England	102.1	92	101.9	87
Basildon	East of England	101.2	99	100.4	98
Stevenage	East of England	102.3	89	99.8	102
Broadland	East of England	98.3	124	98.7	111
Thurrock	East of England	98.0	125	97.5	120
Broxbourne	East of England	95.4	145	97.1	123
Huntingdonshire	East of England	96.6	135	95.8	140
Peterborough	East of England	95.7	140	95.6	141
Bedford	East of England	94.3	155	95.4	145

Locality	Region	2022	Rank 2022	2026	Rank 2026
Central Bedfordshire	East of England	94.5	153	95.2	146
West Suffolk	East of England	90.9	187	95.2	147
Rochford	East of England	91.0	186	95.1	148
Braintree	East of England	91.7	180	94.6	154
Colchester	East of England	94.7	150	94.3	155
Norwich	East of England	95.5	144	92.8	170
East Cambridgeshire	East of England	94.3	156	92.5	174
South Norfolk	East of England	89.3	211	92.5	175
Ipswich	East of England	98.8	116	92.0	182
Luton	East of England	94.0	161	92.0	183
Harlow	East of England	92.7	171	91.4	188
Mid Suffolk	East of England	92.2	176	91.2	190
East Suffolk	East of England	89.3	212	90.0	211
Babergh	East of England	86.9	251	88.7	226
Maldon	East of England	90.4	197	88.6	229
Southend-on-Sea	East of England	87.6	239	87.4	243
Breckland	East of England	84.2	284	85.1	267
Castle Point	East of England	80.5	327	83.2	291
King's Lynn and West Norfolk	East of England	82.0	310	83.1	297
Great Yarmouth	East of England	82.1	308	81.1	317
Fenland	East of England	80.5	328	80.6	324
North Norfolk	East of England	81.6	316	78.9	334
Tendring	East of England	76.5	344	78.6	338
Localities in London					
City of London	London	844.9	1	778.7	1
Westminster	London	229.0	2	234.6	2
Camden	London	178.3	3	184.2	3
Islington	London	159.1	4	162.2	4
Tower Hamlets	London	150.5	5	153.8	5
Hackney	London	133.1	6	136.2	6

Locality	Region	2022	Rank 2022	2026	Rank 2026
Hammersmith and Fulham	London	130.9	9	131.7	7
Kensington and Chelsea	London	131.4	8	129.5	8
Southwark	London	127.3	10	126.2	11
Lambeth	London	119.2	17	118.8	18
Richmond upon Thames	London	119.7	16	116.9	22
Hounslow	London	117.5	19	116.9	23
Kingston upon Thames	London	109.8	47	109.0	42
Hillingdon	London	105.5	65	107.4	53
Wandsworth	London	107.5	56	106.9	57
Merton	London	109.1	49	106.7	59
Barnet	London	106.2	61	105.7	67
Harrow	London	105.1	70	105.3	69
Bromley	London	104.4	74	104.0	74
Ealing	London	103.7	76	103.3	77
Brent	London	104.9	71	102.2	85
Croydon	London	105.2	68	102.1	86
Enfield	London	100.4	105	99.6	104
Havering	London	98.6	118	98.9	109
Redbridge	London	97.2	130	97.6	119
Bexley	London	99.8	107	97.1	124
Sutton	London	99.6	111	97.0	126
Haringey	London	97.8	127	96.9	129
Waltham Forest	London	94.1	158	96.6	131
Greenwich	London	98.0	126	96.5	132
Newham	London	101.1	101	96.2	136
Lewisham	London	94.0	159	92.3	177
Barking and Dagenham	London	90.4	198	91.0	192
Localities in the North East					
Newcastle upon Tyne	North East	93.0	169	94.1	159
Stockton-on-Tees	North East	91.6	181	90.8	195

Locality	Region	2022	Rank 2022	2026	Rank 2026
North Tyneside	North East	90.3	199	90.7	196
Darlington	North East	87.3	243	86.7	251
Middlesbrough	North East	82.6	302	84.5	273
Gateshead	North East	84.1	288	83.2	292
Northumberland	North East	82.2	307	82.5	305
County Durham	North East	81.2	320	81.6	313
Sunderland	North East	82.0	311	81.1	318
Redcar and Cleveland	North East	76.7	343	77.3	343
Hartlepool	North East	77.2	342	75.7	346
South Tyneside	North East	75.5	346	74.6	348
Localities in the North West					
Manchester	North West	110.1	44	113.3	31
Trafford	North West	109.7	48	112.4	33
Warrington	North West	106.3	60	106.9	58
Cheshire East	North West	106.1	62	106.1	65
Ribble Valley	North West	103.9	75	104.6	71
Cheshire West and Chester	North West	98.4	123	102.6	82
South Ribble	North West	102.6	86	100.3	99
Fylde	North West	102.4	87	99.5	105
Salford	North West	102.1	91	98.2	112
Stockport	North West	99.6	110	98.0	114
Preston	North West	93.9	163	96.3	134
Westmorland and Furness	North West	92.7	172	95.4	144
Liverpool	North West	95.7	141	94.9	151
Halton	North West	96.2	136	94.2	156
Chorley	North West	87.4	242	91.9	184
West Lancashire	North West	90.0	202	91.3	189
Bury	North West	90.8	190	89.7	215
Lancaster	North West	85.5	265	87.7	239
Bolton	North West	85.5	263	87.4	242

Locality	Region	2022	Rank 2022	2026	Rank 2026
Cumberland	North West	88.7	225	86.9	247
Knowsley	North West	85.2	268	85.0	268
Blackburn with Darwen	North West	85.7	259	84.8	269
Wirral	North West	85.4	266	84.6	271
Pendle	North West	81.2	321	84.1	278
Rossendale	North West	83.3	291	84.1	279
Sefton	North West	84.4	281	83.8	282
Wyre	North West	80.8	323	83.0	298
Oldham	North West	82.8	296	82.8	302
Burnley	North West	81.4	318	82.0	310
Rochdale	North West	79.6	335	81.2	315
Wigan	North West	83.3	290	80.6	326
Tameside	North West	80.3	331	79.6	329
Hyndburn	North West	82.3	305	79.6	330
St. Helens	North West	79.6	336	79.5	331
Blackpool	North West	81.7	314	78.7	336
Localities in Scotland					
City of Edinburgh	Scotland	115.7	26	117.7	20
Aberdeen City	Scotland	105.3	66	107.1	55
Glasgow City	Scotland	101.1	102	99.7	103
Stirling	Scotland	98.6	117	97.7	117
Aberdeenshire	Scotland	95.9	138	97.0	127
West Lothian	Scotland	95.4	146	96.8	130
Shetland Islands	Scotland	94.6	151	95.6	143
Perth and Kinross	Scotland	94.2	157	93.7	162
Highland	Scotland	90.9	189	93.2	166
North Lanarkshire	Scotland	87.6	238	91.0	193
Falkirk	Scotland	89.7	205	90.5	199
East Renfrewshire	Scotland	87.7	237	90.4	200
South Lanarkshire	Scotland	90.5	196	90.2	201

Locality	Region	2022	Rank 2022	2026	Rank 2026
Orkney Islands	Scotland	92.8	170	90.2	202
Argyll and Bute	Scotland	89.1	213	89.5	216
East Dunbartonshire	Scotland	88.1	233	89.4	218
Renfrewshire	Scotland	89.0	216	89.0	224
Clackmannanshire	Scotland	87.1	248	88.2	236
South Ayrshire	Scotland	85.4	267	88.1	237
Moray	Scotland	89.0	214	87.8	238
Scottish Borders	Scotland	87.7	236	87.6	241
East Lothian	Scotland	88.4	229	87.3	245
Dundee City	Scotland	88.4	230	86.8	249
Midlothian	Scotland	87.0	249	86.4	252
Dumfries and Galloway	Scotland	82.8	298	85.8	258
Fife	Scotland	85.8	258	85.5	262
West Dunbartonshire	Scotland	85.5	264	85.4	264
Angus	Scotland	86.2	253	84.8	270
Na h-Eileanan Siar	Scotland	85.1	270	83.2	293
North Ayrshire	Scotland	84.2	286	83.1	295
East Ayrshire	Scotland	82.8	297	81.5	314
Inverclyde	Scotland	80.7	324	77.0	344
Localities in the South East					
Runnymede	South East	131.4	7	128.0	9
Mole Valley	South East	117.2	21	126.9	10
Wokingham	South East	121.9	14	122.9	13
Elmbridge	South East	123.4	12	122.7	14
Windsor and Maidenhead	South East	123.3	13	119.6	15
Reading	South East	116.5	23	119.5	16
Slough	South East	120.6	15	119.3	17
Rushmoor	South East	117.2	20	117.0	21
West Berkshire	South East	116.3	24	114.6	25
Guildford	South East	114.2	28	114.5	26

Locality	Region	2022	Rank 2022	2026	Rank 2026
Reigate and Banstead	South East	114.5	27	114.5	27
Milton Keynes	South East	115.8	25	113.8	29
Winchester	South East	110.7	40	109.9	38
Surrey Heath	South East	110.4	43	109.2	41
Bracknell Forest	South East	112.0	32	108.9	43
Sevenoaks	South East	104.6	73	108.7	46
Woking	South East	110.5	42	108.5	47
Waverley	South East	108.4	50	108.4	48
Brighton and Hove	South East	110.0	45	108.1	49
Hart	South East	111.6	33	108.0	50
Spelthorne	South East	111.2	35	107.8	51
South Oxfordshire	South East	106.4	59	107.4	52
Buckinghamshire	South East	107.7	54	107.1	54
Vale of White Horse	South East	111.1	36	106.9	56
Basingstoke and Deane	South East	107.7	52	106.2	64
Oxford	South East	109.9	46	105.8	66
Cherwell	South East	102.6	85	103.3	76
Worthing	South East	102.0	94	103.1	78
Tunbridge Wells	South East	102.3	88	102.9	79
Epsom and Ewell	South East	100.8	103	102.8	80
West Oxfordshire	South East	101.4	95	102.3	83
Tonbridge and Malling	South East	103.1	79	102.3	84
Eastleigh	South East	102.9	80	101.2	91
Horsham	South East	101.2	100	101.0	93
Fareham	South East	98.6	119	101.0	94
Dartford	South East	102.2	90	100.6	96
Tandridge	South East	98.5	121	100.5	97
Crawley	South East	102.7	82	100.1	100
Chichester	South East	94.6	152	99.3	107
Mid Sussex	South East	100.3	106	98.1	113

Locality	Region	2022	Rank 2022	2026	Rank 2026
New Forest	South East	96.7	133	98.0	115
East Hampshire	South East	99.6	109	97.7	118
Southampton	South East	101.3	98	97.3	122
Maidstone	South East	98.4	122	96.3	133
Test Valley	South East	99.5	112	96.0	138
Portsmouth	South East	93.4	166	95.1	149
Lewes	South East	88.8	222	93.4	164
Ashford	South East	94.0	160	93.1	167
Medway	South East	92.5	173	92.4	176
Adur	South East	87.9	234	92.1	180
Wealden	South East	91.0	185	91.1	191
Havant	South East	86.9	252	90.7	197
Dover	South East	89.5	209	90.2	205
Canterbury	South East	88.9	219	89.1	221
Folkestone and Hythe	South East	91.0	184	88.6	228
Gravesham	South East	91.8	178	86.9	248
Swale	South East	86.2	254	86.3	254
Rother	South East	84.2	285	84.2	277
Thanet	South East	80.2	334	83.8	283
Arun	South East	84.4	280	83.6	285
Hastings	South East	81.4	317	82.8	300
Isle of Wight	South East	80.3	332	81.7	312
Eastbourne	South East	85.1	272	81.1	319
Gosport	South East	75.8	345	78.4	339

Locality	Region	2022	Rank 2022	2026	Rank 2026
Localities in the South West					
South Gloucestershire	South West	110.5	41	109.8	39
Cotswold	South West	108.0	51	108.8	44
Cheltenham	South West	105.3	67	106.5	60
Bristol, City of	South West	105.9	64	106.4	63
Swindon	South West	106.4	57	104.7	70
Tewkesbury	South West	102.6	84	102.7	81
Exeter	South West	99.4	114	101.5	89
Bournemouth, Christchurch and Poole	South West	96.8	132	97.0	125
Stroud	South West	97.1	131	97.0	128
Wiltshire	South West	95.5	143	95.9	139
Bath and North East Somerset	South West	96.2	137	95.6	142
East Devon	South West	90.6	193	93.2	165
North Somerset	South West	93.9	162	92.9	169
Dorset	South West	90.2	200	92.6	173
South Hams	South West	91.7	179	90.2	203
Somerset	South West	90.8	191	90.2	206
North Devon	South West	89.0	217	90.2	207
Forest of Dean	South West	89.0	218	90.1	210
Mid Devon	South West	84.1	287	88.6	227
Gloucester	South West	87.1	247	88.5	230
Teignbridge	South West	87.3	244	88.5	232
Cornwall	South West	87.0	250	86.8	250
Plymouth	South West	85.0	273	83.2	290
Torridge	South West	83.3	292	81.0	321
West Devon	South West	80.2	333	80.6	325
Torbay	South West	78.5	339	78.1	340

Locality	Region	2022	Rank 2022	2026	Rank 2026
Localities in Wales					
Cardiff	Wales	100.6	104	100.0	101
Monmouthshire	Wales	96.6	134	96.2	137
Flintshire	Wales	95.1	148	94.1	158
Newport	Wales	89.6	207	89.9	213
Wrexham	Wales	88.3	232	88.7	225
Pembrokeshire	Wales	85.9	256	85.8	257
Swansea	Wales	87.1	246	85.1	266
Ceredigion	Wales	84.4	279	84.4	274
Bridgend	Wales	87.6	240	84.4	275
Vale of Glamorgan	Wales	85.8	257	83.9	281
Powys	Wales	82.4	303	83.5	287
Denbighshire	Wales	81.6	315	83.4	289
Isle of Anglesey	Wales	80.6	326	83.1	296
Torfaen	Wales	81.8	312	82.0	309
Carmarthenshire	Wales	82.6	300	81.9	311
Gwynedd	Wales	81.7	313	80.9	323
Caerphilly	Wales	80.7	325	79.7	328
Conwy	Wales	80.4	329	79.4	333
Neath Port Talbot	Wales	80.3	330	78.6	337
Rhondda Cynon Taf	Wales	78.7	338	77.8	341
Merthyr Tydfil	Wales	73.6	348	75.1	347
Blaenau Gwent	Wales	72.9	349	72.5	349
Localities in the West Midlands					
Warwick	West Midlands	113.3	30	115.2	24
Stratford-on-Avon	West Midlands	110.9	38	112.1	35
Bromsgrove	West Midlands	102.8	81	106.5	62
Solihull	West Midlands	107.7	55	104.5	72
Rugby	West Midlands	101.4	96	101.5	88
North Warwickshire	West Midlands	101.3	97	99.4	106

Locality	Region	2022	Rank 2022	2026	Rank 2026
Wychavon	West Midlands	97.4	128	99.0	108
Worcester	West Midlands	98.5	120	96.3	135
East Staffordshire	West Midlands	95.5	142	94.6	153
Coventry	West Midlands	95.1	147	94.2	157
Lichfield	West Midlands	94.7	149	93.6	163
Malvern Hills	West Midlands	94.5	154	92.7	171
Herefordshire, County of	West Midlands	88.8	223	92.3	178
Birmingham	West Midlands	92.4	174	92.2	179
Stafford	West Midlands	90.9	188	92.1	181
Shropshire	West Midlands	89.0	215	89.7	214
Telford and Wrekin	West Midlands	89.7	206	89.4	217
Redditch	West Midlands	88.7	224	89.1	223
Cannock Chase	West Midlands	87.3	245	88.3	234
South Staffordshire	West Midlands	91.6	182	88.3	235
Tamworth	West Midlands	89.6	208	87.7	240
Wolverhampton	West Midlands	84.8	276	86.9	246
Dudley	West Midlands	84.3	282	83.7	284
Stoke-on-Trent	West Midlands	83.1	293	83.4	288
Staffordshire Moorlands	West Midlands	82.8	294	82.9	299
Newcastle-under-Lyme	West Midlands	85.5	262	82.6	304
Wyre Forest	West Midlands	82.0	309	82.3	307
Sandwell	West Midlands	77.9	340	81.2	316
Nuneaton and Bedworth	West Midlands	82.7	299	80.9	322
Walsall	West Midlands	81.4	319	79.4	332
Localities in Yorkshire and the Humber					
Leeds	Yorkshire and the Humber	102.1	93	101.2	90
York	Yorkshire and the Humber	102.7	83	101.2	92
North Yorkshire	Yorkshire and the Humber	93.9	164	93.7	161
East Riding of Yorkshire	Yorkshire and the Humber	90.6	194	91.0	194
Calderdale	Yorkshire and the Humber	92.3	175	90.1	208

Locality	Region	2022	Rank 2022	2026	Rank 2026
Sheffield	Yorkshire and the Humber	90.7	192	89.9	212
North Lincolnshire	Yorkshire and the Humber	93.4	165	89.1	222
Wakefield	Yorkshire and the Humber	85.0	274	86.2	255
Kirklees	Yorkshire and the Humber	84.5	278	85.5	261
Bradford	Yorkshire and the Humber	84.5	277	83.9	280
Doncaster	Yorkshire and the Humber	85.1	271	83.5	286
Barnsley	Yorkshire and the Humber	80.8	322	82.8	301
North East Lincolnshire	Yorkshire and the Humber	82.2	306	82.7	303
Kingston upon Hull, City of	Yorkshire and the Humber	83.4	289	81.0	320
Rotherham	Yorkshire and the Humber	82.6	301	79.8	327

Appendix 5: GVA Growth Forecasts (UKCI 2026)

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Camden	7.91	1	1.87	1	3.85	1	10.85	1
Islington	6.56	2	1.35	3	3.53	2	9.14	2
Tower Hamlets	6.33	3	1.44	2	3.09	4	8.21	3
Hackney	5.63	4	0.97	4	3.38	3	8.08	4
Three Rivers	4.72	5	0.75	5	2.88	8	6.46	6
Hammersmith and Fulham	4.62	6	0.63	6	3.03	6	6.62	5
Kensington and Chelsea	4.05	7	0.34	9	3.06	5	6.17	7
Mole Valley	4.03	8	0.42	7	2.86	11	5.82	8
Southwark	3.92	9	0.36	8	2.87	10	5.74	9
Stratford-on-Avon	3.74	10	0.32	10	2.76	26	5.41	11
Reading	3.61	11	0.26	11	2.77	24	5.30	14
Wokingham	3.58	12	0.22	12	2.82	19	5.36	12
Hertsmere	3.57	13	0.19	14	2.88	9	5.45	10
South Cambridgeshire	3.52	14	0.21	13	2.77	23	5.23	15
Lambeth	3.51	15	0.18	15	2.83	15	5.32	13
Guildford	3.36	16	0.12	17	2.80	20	5.14	17
Windsor and Maidenhead	3.33	17	0.09	21	2.84	12	5.18	16
Runnymede	3.25	18	0.10	20	2.72	33	4.92	22
Welwyn Hatfield	3.24	19	0.12	18	2.69	48	4.85	24
Ribble Valley	3.23	20	0.13	16	2.64	66	4.76	26
Kingston upon Thames	3.20	21	0.04	22	2.82	18	5.03	19
Wandsworth	3.16	22	0.01	23	2.83	17	5.01	20
Stevenage	3.15	23	0.11	19	2.60	79	4.63	28
Richmond upon Thames	3.14	24	-0.03	25	2.89	7	5.10	18
Woking	3.08	25	0.00	24	2.77	25	4.84	25

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
St Albans	3.08	26	-0.03	26	2.83	13	4.95	21
Elmbridge	2.99	27	-0.07	29	2.83	14	4.87	23
East Hertfordshire	2.94	28	-0.05	27	2.74	28	4.67	27
Bromley	2.89	29	-0.07	30	2.72	34	4.60	29
Hounslow	2.84	30	-0.10	32	2.73	30	4.57	30
Cambridge	2.83	31	-0.07	28	2.65	63	4.43	34
Reigate and Banstead	2.81	32	-0.10	31	2.69	45	4.48	31
North Hertfordshire	2.76	33	-0.13	33	2.70	42	4.45	33
Bracknell Forest	2.65	34	-0.14	34	2.61	78	4.20	43
City of Edinburgh	2.62	35	-0.18	36	2.68	53	4.29	38
South Oxfordshire	2.62	36	-0.19	37	2.69	44	4.32	37
Vale of White Horse	2.60	37	-0.18	35	2.63	69	4.19	45
Winchester	2.58	38	-0.23	39	2.73	31	4.33	36
Cheltenham	2.54	39	-0.23	41	2.70	43	4.26	40
Harrow	2.54	40	-0.29	49	2.83	16	4.47	32
Lewisham	2.52	41	-0.22	38	2.65	60	4.16	47
Bristol, City of	2.51	42	-0.23	40	2.65	59	4.15	48
Tandridge	2.48	43	-0.24	42	2.65	61	4.12	49
Buckinghamshire	2.48	44	-0.27	46	2.72	37	4.23	42
Haringey	2.47	45	-0.28	48	2.73	29	4.24	41
Barnet	2.46	46	-0.31	51	2.79	21	4.34	35
Brentwood	2.45	47	-0.28	47	2.70	40	4.18	46
Epsom and Ewell	2.43	48	-0.30	50	2.72	35	4.19	44
Newham	2.42	49	-0.27	44	2.64	64	4.06	52
Waverley	2.41	50	-0.33	53	2.78	22	4.27	39
Aberdeen City	2.41	51	-0.27	45	2.63	71	4.02	55
East Renfrewshire	2.36	52	-0.25	43	2.54	106	3.84	69
Ealing	2.33	53	-0.35	58	2.72	32	4.12	50
Hart	2.28	54	-0.34	57	2.65	62	3.95	60

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Dacorum	2.28	55	-0.37	63	2.71	38	4.05	53
Warwick	2.27	56	-0.37	65	2.71	39	4.03	54
Surrey Heath	2.27	57	-0.35	59	2.66	56	3.96	57
Warrington	2.27	58	-0.33	54	2.62	73	3.89	68
Slough	2.27	59	-0.34	56	2.63	67	3.91	67
West Berkshire	2.26	60	-0.36	60	2.66	55	3.95	58
Milton Keynes	2.24	61	-0.36	61	2.66	58	3.92	62
Merton	2.22	62	-0.41	73	2.76	27	4.07	51
Uttlesford	2.22	63	-0.37	66	2.66	57	3.91	65
Oxford	2.22	64	-0.33	55	2.57	90	3.76	72
Epping Forest	2.21	65	-0.39	68	2.69	47	3.95	59
Hillingdon	2.21	66	-0.39	67	2.68	52	3.92	61
South Gloucestershire	2.19	67	-0.33	52	2.53	109	3.68	74
Manchester	2.19	68	-0.39	69	2.68	51	3.91	64
Trafford	2.19	69	-0.41	72	2.72	36	3.98	56
Waltham Forest	2.19	70	-0.40	70	2.68	50	3.92	63
Watford	2.14	71	-0.43	77	2.70	41	3.91	66
Enfield	2.12	72	-0.41	71	2.63	70	3.77	71
East Dunbartonshire	2.08	73	-0.37	64	2.49	133	3.51	85
Brighton and Hove	2.07	74	-0.46	81	2.69	46	3.82	70
Rugby	2.05	75	-0.42	75	2.58	88	3.63	76
Basingstoke and Deane	2.04	76	-0.42	74	2.56	92	3.60	79
Shetland Islands	2.03	77	-0.37	62	2.44	171	3.39	96
Chelmsford	2.02	78	-0.44	78	2.58	87	3.61	77
Cheshire East	2.02	79	-0.45	80	2.61	76	3.66	75
Tewkesbury	1.99	80	-0.43	76	2.53	112	3.50	88
Aberdeenshire	1.97	81	-0.44	79	2.55	102	3.51	84
Sevenoaks	1.95	82	-0.51	90	2.67	54	3.69	73
West Oxfordshire	1.93	83	-0.50	85	2.62	72	3.60	78

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Solihull	1.93	84	-0.46	82	2.55	105	3.47	90
Croydon	1.92	85	-0.49	84	2.59	84	3.53	81
Cherwell	1.90	86	-0.50	86	2.59	82	3.52	83
Sutton	1.90	87	-0.51	91	2.61	77	3.55	80
Havering	1.89	88	-0.49	83	2.56	93	3.47	91
Mid Sussex	1.88	89	-0.50	87	2.58	89	3.49	89
Rushcliffe	1.88	90	-0.51	89	2.59	83	3.51	87
Greenwich	1.87	91	-0.51	93	2.60	81	3.51	86
Fareham	1.85	92	-0.50	88	2.55	101	3.40	95
Brent	1.81	93	-0.56	98	2.64	65	3.52	82
Blaby	1.80	94	-0.51	92	2.51	119	3.30	99
Monmouthshire	1.79	95	-0.53	94	2.55	103	3.36	97
Horsham	1.76	96	-0.58	101	2.62	74	3.44	93
Stirling	1.75	97	-0.54	96	2.53	110	3.29	100
Fylde	1.75	98	-0.54	95	2.52	117	3.27	102
East Hampshire	1.74	99	-0.59	104	2.61	75	3.42	94
Central Bedfordshire	1.70	100	-0.57	99	2.53	113	3.24	103
Glasgow City	1.69	101	-0.56	97	2.51	121	3.20	106
York	1.68	102	-0.57	100	2.52	116	3.21	105
Bath and North East Somerset	1.68	103	-0.59	105	2.56	94	3.28	101
Redbridge	1.66	104	-0.66	115	2.68	49	3.46	92
Tunbridge Wells	1.64	105	-0.64	113	2.63	68	3.35	98
Tonbridge and Malling	1.63	106	-0.61	106	2.55	99	3.22	104
Coventry	1.59	107	-0.59	103	2.45	165	3.02	114
Spelthorne	1.59	108	-0.63	111	2.55	98	3.18	108
Barking and Dagenham	1.59	109	-0.63	110	2.54	108	3.16	109
South Ayrshire	1.56	110	-0.58	102	2.40	204	2.91	128
Rushmoor	1.54	111	-0.62	108	2.47	147	3.01	117
Thurrock	1.54	112	-0.62	109	2.47	146	3.01	116

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Dartford	1.54	113	-0.66	116	2.55	97	3.14	110
Wychavon	1.54	114	-0.67	120	2.59	85	3.19	107
Crawley	1.53	115	-0.61	107	2.44	176	2.94	126
Preston	1.49	116	-0.66	117	2.51	122	3.03	113
Huntingdonshire	1.49	117	-0.65	114	2.49	138	2.99	120
Malvern Hills	1.47	118	-0.67	118	2.50	123	3.00	119
Stroud	1.47	119	-0.69	125	2.55	100	3.07	112
Test Valley	1.43	120	-0.69	123	2.50	125	2.96	122
Cheshire West and Chester	1.43	121	-0.70	130	2.53	111	3.01	115
Cumberland	1.42	122	-0.64	112	2.37	235	2.73	151
Basildon	1.41	123	-0.69	124	2.48	145	2.91	129
Gravesham	1.41	124	-0.68	121	2.46	158	2.88	133
Adur	1.41	125	-0.69	126	2.49	132	2.93	127
Westmorland and Furness	1.41	126	-0.67	119	2.44	172	2.84	137
Broxbourne	1.40	127	-0.72	135	2.54	107	3.00	118
Bromsgrove	1.40	128	-0.75	151	2.60	80	3.10	111
Rutland	1.39	129	-0.70	128	2.49	141	2.90	131
Colchester	1.38	130	-0.70	131	2.48	144	2.89	132
Cardiff	1.38	131	-0.72	137	2.52	115	2.95	124
Bedford	1.38	132	-0.72	138	2.53	114	2.96	123
Stockport	1.38	133	-0.73	142	2.55	104	2.99	121
Hinckley and Bosworth	1.38	134	-0.70	129	2.47	149	2.86	134
South Derbyshire	1.37	135	-0.68	122	2.42	185	2.78	144
Leeds	1.34	136	-0.73	145	2.51	118	2.90	130
Worcester	1.34	137	-0.72	136	2.47	148	2.83	138
Eastleigh	1.33	138	-0.73	144	2.50	131	2.86	136
Wiltshire	1.32	139	-0.74	147	2.50	126	2.86	135
Derby	1.32	140	-0.70	132	2.41	195	2.72	154
Southampton	1.31	141	-0.71	134	2.42	186	2.73	152

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Rochford	1.31	142	-0.73	139	2.46	161	2.78	143
Orkney Islands	1.30	143	-0.70	127	2.38	231	2.64	164
East Devon	1.29	144	-0.73	146	2.45	162	2.76	147
Highland	1.29	145	-0.73	141	2.44	173	2.73	150
South Norfolk	1.28	146	-0.74	148	2.46	159	2.76	146
West Northamptonshire	1.27	147	-0.76	153	2.50	128	2.81	139
West Lothian	1.26	148	-0.73	143	2.42	189	2.68	158
Perth and Kinross	1.26	149	-0.74	149	2.44	175	2.70	155
Cotswold	1.26	150	-0.81	163	2.58	86	2.94	125
Bournemouth, Christchurch and Poole	1.25	151	-0.77	155	2.50	129	2.80	140
Salford	1.24	152	-0.78	158	2.50	127	2.79	141
Mid Suffolk	1.24	153	-0.74	150	2.42	191	2.65	163
Falkirk	1.24	154	-0.73	140	2.38	230	2.59	172
Lewes	1.23	155	-0.78	157	2.49	139	2.77	145
South Lanarkshire	1.21	156	-0.76	152	2.41	196	2.62	168
Wealden	1.21	157	-0.80	161	2.51	120	2.78	142
Portsmouth	1.19	158	-0.77	154	2.43	180	2.63	166
Knowsley	1.19	159	-0.71	133	2.29	302	2.39	190
Swindon	1.18	160	-0.77	156	2.41	198	2.59	171
Luton	1.17	161	-0.80	160	2.47	152	2.68	159
North Somerset	1.17	162	-0.81	162	2.48	143	2.70	156
Bexley	1.15	163	-0.82	164	2.49	140	2.69	157
Midlothian	1.13	164	-0.78	159	2.38	225	2.50	180
Charnwood	1.12	165	-0.82	165	2.45	167	2.60	170
West Suffolk	1.12	166	-0.83	166	2.47	151	2.63	165
New Forest	1.11	167	-0.84	171	2.49	136	2.67	161
Ashford	1.10	168	-0.85	174	2.50	124	2.67	160
Maidstone	1.09	169	-0.85	175	2.50	130	2.65	162
Derbyshire Dales	1.09	170	-0.88	187	2.56	96	2.75	148

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Braintree	1.09	171	-0.83	168	2.45	168	2.57	174
Stafford	1.09	172	-0.84	173	2.47	150	2.61	169
Chichester	1.07	173	-0.89	190	2.56	95	2.74	149
Herefordshire, County of	1.07	174	-0.86	180	2.49	135	2.63	167
Dorset	1.06	175	-0.85	176	2.46	155	2.57	173
South Staffordshire	1.05	176	-0.83	170	2.41	200	2.48	181
Chorley	1.05	177	-0.85	177	2.46	160	2.55	176
Worthing	1.04	178	-0.86	181	2.47	153	2.56	175
Liverpool	1.04	179	-0.85	178	2.45	166	2.53	177
Harborough	1.04	180	-0.91	196	2.57	91	2.73	153
Argyll and Bute	1.02	181	-0.84	172	2.39	218	2.42	189
Birmingham	1.00	182	-0.88	188	2.46	157	2.51	179
Na h-Eileanan Siar	0.99	183	-0.83	167	2.34	269	2.30	203
Harlow	0.99	184	-0.87	183	2.42	187	2.44	187
Mid Devon	0.98	185	-0.88	184	2.43	179	2.45	184
Norwich	0.97	186	-0.90	195	2.48	142	2.53	178
North Yorkshire	0.96	187	-0.89	192	2.45	169	2.46	183
Peterborough	0.96	188	-0.89	191	2.44	174	2.45	185
Flintshire	0.96	189	-0.86	182	2.38	227	2.35	196
North Warwickshire	0.95	190	-0.88	185	2.40	207	2.38	193
Medway	0.94	191	-0.89	189	2.41	197	2.39	191
North Ayrshire	0.94	192	-0.83	169	2.28	307	2.17	219
North Lanarkshire	0.93	193	-0.86	179	2.34	264	2.25	206
Havant	0.93	194	-0.89	194	2.42	194	2.38	194
Renfrewshire	0.92	195	-0.88	186	2.37	234	2.30	201
Castle Point	0.92	196	-0.89	193	2.40	209	2.34	197
Newcastle upon Tyne	0.91	197	-0.91	198	2.43	181	2.38	192
Bury	0.90	198	-0.94	205	2.49	137	2.48	182
Exeter	0.90	199	-0.93	203	2.46	156	2.43	188

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Somerset	0.89	200	-0.91	199	2.42	190	2.36	195
North Tyneside	0.88	201	-0.91	197	2.40	215	2.30	202
Lichfield	0.86	202	-0.96	215	2.49	134	2.45	186
Newport	0.85	203	-0.91	200	2.37	232	2.24	207
North Northamptonshire	0.83	204	-0.95	209	2.43	182	2.31	200
Canterbury	0.82	205	-0.95	210	2.42	183	2.30	204
East Staffordshire	0.81	206	-0.94	207	2.40	213	2.24	208
Sheffield	0.80	207	-0.95	208	2.39	216	2.23	210
Amber Valley	0.79	208	-0.94	206	2.38	228	2.20	212
South Kesteven	0.79	209	-0.98	222	2.47	154	2.34	198
North West Leicestershire	0.79	210	-0.98	219	2.45	163	2.32	199
East Suffolk	0.77	211	-0.95	211	2.38	223	2.19	215
King's Lynn and West Norfolk	0.77	212	-0.92	201	2.30	291	2.06	232
Newark and Sherwood	0.77	213	-0.95	212	2.38	226	2.19	216
South Ribble	0.77	214	-0.97	217	2.41	199	2.24	209
Shropshire	0.76	215	-0.98	223	2.44	177	2.27	205
Chesterfield	0.76	216	-0.95	213	2.37	242	2.15	223
Clackmannanshire	0.76	217	-0.93	202	2.31	285	2.05	233
Fife	0.75	218	-0.94	204	2.32	276	2.07	228
East Riding of Yorkshire	0.74	219	-0.98	220	2.40	210	2.18	217
Dover	0.72	220	-0.96	214	2.34	265	2.07	229
Erewash	0.71	221	-0.99	224	2.40	214	2.16	221
Maldon	0.70	222	-1.01	229	2.43	178	2.21	211
Thanet	0.70	223	-1.00	225	2.40	206	2.16	220
North East Derbyshire	0.70	224	-0.97	216	2.34	268	2.05	236
Halton	0.70	225	-0.98	218	2.35	253	2.07	230
Folkestone and Hythe	0.68	226	-1.01	227	2.40	212	2.13	224
High Peak	0.68	227	-1.03	237	2.44	170	2.20	213
East Cambridgeshire	0.67	228	-1.02	236	2.42	184	2.17	218

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
East Lothian	0.67	229	-1.01	226	2.38	224	2.10	226
Calderdale	0.67	230	-1.02	235	2.42	192	2.16	222
Southend-on-Sea	0.66	231	-1.04	244	2.45	164	2.20	214
Broadland	0.65	232	-1.02	234	2.40	211	2.10	225
Barnsley	0.65	233	-0.98	221	2.31	287	1.95	245
Redditch	0.64	234	-1.01	230	2.37	236	2.06	231
Cannock Chase	0.64	235	-1.01	228	2.36	247	2.03	237
Telford and Wrekin	0.61	236	-1.02	232	2.35	252	2.00	240
Wolverhampton	0.61	237	-1.04	241	2.39	222	2.05	234
Pembrokeshire	0.60	238	-1.02	233	2.34	258	1.98	242
North Kesteven	0.60	239	-1.03	239	2.36	245	1.99	241
Swansea	0.58	240	-1.03	240	2.34	267	1.94	247
Forest of Dean	0.57	241	-1.06	248	2.40	205	2.05	235
Oadby and Wigston	0.57	242	-1.07	250	2.42	188	2.08	227
Dundee City	0.56	243	-1.04	243	2.34	256	1.94	246
Ashfield	0.54	244	-1.02	231	2.27	317	1.80	264
Dudley	0.54	245	-1.06	246	2.36	249	1.94	249
Wrexham	0.54	246	-1.04	242	2.31	282	1.87	255
Teignbridge	0.52	247	-1.08	258	2.40	208	2.00	239
Stockton-on-Tees	0.52	248	-1.07	249	2.37	241	1.94	248
Inverclyde	0.52	249	-1.03	238	2.27	314	1.79	266
Leicester	0.52	250	-1.09	261	2.41	201	2.02	238
Scottish Borders	0.52	251	-1.07	251	2.37	240	1.94	250
Vale of Glamorgan	0.52	252	-1.08	254	2.39	220	1.97	243
Bridgend	0.49	253	-1.05	245	2.29	299	1.79	265
West Lancashire	0.49	254	-1.09	259	2.37	239	1.91	251
Staffordshire Moorlands	0.46	255	-1.08	255	2.33	272	1.83	260
West Lindsey	0.46	256	-1.08	256	2.33	274	1.83	262
Lancaster	0.46	257	-1.09	260	2.34	262	1.85	258

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Breckland	0.45	258	-1.08	257	2.32	277	1.81	263
Eastbourne	0.45	259	-1.07	252	2.29	296	1.76	270
South Hams	0.45	260	-1.13	273	2.42	193	1.96	244
East Ayrshire	0.45	261	-1.07	253	2.29	297	1.75	272
Wirral	0.44	262	-1.10	264	2.35	251	1.85	257
Bolsover	0.44	263	-1.06	247	2.25	330	1.67	287
Ceredigion	0.43	264	-1.11	266	2.35	250	1.85	259
Isle of Anglesey	0.41	265	-1.10	262	2.31	288	1.75	275
Babergh	0.41	266	-1.14	275	2.39	217	1.89	253
Northumberland	0.40	267	-1.11	265	2.32	281	1.75	273
Rother	0.39	268	-1.15	280	2.41	202	1.89	252
Kirklees	0.39	269	-1.14	276	2.38	229	1.85	256
Ipswich	0.39	270	-1.12	271	2.33	271	1.77	269
Angus	0.38	271	-1.12	268	2.32	280	1.74	276
Melton	0.38	272	-1.16	284	2.41	203	1.88	254
Wakefield	0.37	273	-1.12	267	2.31	289	1.71	280
Gloucester	0.37	274	-1.13	274	2.34	261	1.77	268
Hyndburn	0.37	275	-1.10	263	2.26	320	1.63	293
Nottingham	0.35	276	-1.16	285	2.39	221	1.83	261
Broxtowe	0.35	277	-1.15	281	2.36	243	1.79	267
North Lincolnshire	0.34	278	-1.13	272	2.30	293	1.68	285
Dumfries and Galloway	0.34	279	-1.12	270	2.28	309	1.64	291
Plymouth	0.33	280	-1.12	269	2.27	318	1.61	297
Torridge	0.32	281	-1.15	279	2.33	275	1.70	281
Swale	0.31	282	-1.16	287	2.34	257	1.72	278
Sefton	0.31	283	-1.16	289	2.34	259	1.72	279
Torfaen	0.31	284	-1.14	277	2.30	294	1.64	292
Wyre Forest	0.30	285	-1.18	291	2.37	237	1.76	271
West Devon	0.29	286	-1.18	290	2.36	244	1.73	277

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Powys	0.29	287	-1.19	292	2.37	233	1.75	274
Lincoln	0.28	288	-1.15	282	2.29	298	1.61	298
West Dunbartonshire	0.27	289	-1.15	278	2.26	319	1.55	301
Darlington	0.26	290	-1.19	293	2.34	255	1.68	284
Hastings	0.26	291	-1.19	294	2.35	254	1.68	283
Mansfield	0.25	292	-1.16	286	2.28	311	1.56	300
Bradford	0.25	293	-1.19	296	2.34	260	1.67	288
Oldham	0.24	294	-1.19	297	2.34	263	1.66	289
Blackburn with Darwen	0.24	295	-1.19	295	2.33	270	1.65	290
Cornwall	0.23	296	-1.21	302	2.36	248	1.67	286
Redcar and Cleveland	0.23	297	-1.16	288	2.25	326	1.50	305
Neath Port Talbot	0.23	298	-1.15	283	2.23	335	1.46	310
Middlesbrough	0.22	299	-1.20	298	2.33	273	1.62	295
Arun	0.22	300	-1.21	301	2.34	266	1.63	294
Bolton	0.20	301	-1.24	309	2.39	219	1.70	282
Tamworth	0.18	302	-1.21	303	2.31	286	1.54	303
Doncaster	0.17	303	-1.22	305	2.31	283	1.54	302
Denbighshire	0.17	304	-1.21	304	2.30	292	1.52	304
Rossendale	0.16	305	-1.24	311	2.36	246	1.61	296
Stoke-on-Trent	0.16	306	-1.21	299	2.28	312	1.48	306
Walsall	0.13	307	-1.22	306	2.29	304	1.47	308
Gosport	0.13	308	-1.21	300	2.25	328	1.40	315
Gateshead	0.12	309	-1.23	308	2.30	295	1.48	307
Tendring	0.11	310	-1.23	307	2.27	315	1.43	312
North Devon	0.10	311	-1.28	317	2.37	238	1.57	299
Bassetlaw	0.08	312	-1.26	314	2.31	284	1.47	309
Gwynedd	0.08	313	-1.25	312	2.28	313	1.41	313
Moray	0.06	314	-1.26	313	2.28	310	1.39	317
Great Yarmouth	0.06	315	-1.24	310	2.24	333	1.33	321

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Carmarthenshire	0.05	316	-1.26	315	2.29	306	1.40	316
Wyre	0.04	317	-1.28	319	2.32	279	1.44	311
Gedling	-0.01	318	-1.31	325	2.32	278	1.41	314
Nuneaton and Bedworth	-0.01	319	-1.28	318	2.26	322	1.30	322
Newcastle-under-Lyme	-0.01	320	-1.29	321	2.29	300	1.35	318
Kingston upon Hull, City of	-0.01	321	-1.27	316	2.23	334	1.26	324
Sandwell	-0.02	322	-1.30	322	2.29	303	1.34	320
Rochdale	-0.02	323	-1.30	323	2.29	301	1.34	319
North East Lincolnshire	-0.03	324	-1.29	320	2.24	331	1.26	325
St. Helens	-0.07	325	-1.32	327	2.29	305	1.30	323
Rhondda Cynon Taf	-0.11	326	-1.31	324	2.21	342	1.13	329
South Tyneside	-0.12	327	-1.32	326	2.22	339	1.15	326
Hartlepool	-0.14	328	-1.33	328	2.23	337	1.14	328
Caerphilly	-0.19	329	-1.35	329	2.22	340	1.08	335
County Durham	-0.21	330	-1.37	330	2.24	332	1.10	332
Wigan	-0.23	331	-1.39	331	2.25	324	1.10	333
Conwy	-0.23	332	-1.40	335	2.28	308	1.14	327
Torbay	-0.25	333	-1.39	333	2.25	327	1.07	336
North Norfolk	-0.25	334	-1.40	337	2.27	316	1.11	331
Tameside	-0.26	335	-1.40	336	2.26	321	1.09	334
Rotherham	-0.26	336	-1.40	334	2.25	329	1.06	337
Fenland	-0.26	337	-1.39	332	2.23	338	1.03	338
Pendle	-0.30	338	-1.44	339	2.30	290	1.12	330
Blackpool	-0.36	339	-1.43	338	2.21	341	0.92	341
Isle of Wight	-0.41	340	-1.47	343	2.26	323	0.95	339
South Holland	-0.41	341	-1.48	344	2.25	325	0.94	340
Sunderland	-0.45	342	-1.46	342	2.19	344	0.79	343
Boston	-0.46	343	-1.46	341	2.17	345	0.75	344
East Lindsey	-0.47	344	-1.48	345	2.20	343	0.81	342

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Blaenau Gwent	-0.49	345	-1.45	340	2.12	347	0.66	346
Burnley	-0.61	346	-1.56	346	2.23	336	0.73	345
Merthyr Tydfil	-0.72	347	-1.58	347	2.15	346	0.50	347

Appendix 6: GVA per Capita Growth Forecasts (UKCI 2026)

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Camden	7.71	1	1.10	1	3.07	1	10.30	1
Islington	6.36	2	0.58	3	2.75	2	8.60	2
Tower Hamlets	6.14	3	0.67	2	2.31	4	7.67	3
Hackney	5.44	4	0.20	4	2.60	3	7.54	4
Three Rivers	4.53	5	-0.02	5	2.11	8	5.93	6
Hammersmith and Fulham	4.43	6	-0.14	6	2.26	6	6.09	5
Kensington and Chelsea	3.86	7	-0.43	9	2.28	5	5.63	7
Mole Valley	3.84	8	-0.35	7	2.08	11	5.30	8
Southwark	3.73	9	-0.40	8	2.09	10	5.21	9
Stratford-on-Avon	3.55	10	-0.44	10	1.99	26	4.88	11
Reading	3.42	11	-0.51	11	1.99	24	4.77	14
Wokingham	3.39	12	-0.54	12	2.04	19	4.83	12
Hertsmere	3.38	13	-0.58	14	2.10	9	4.92	10
South Cambridgeshire	3.33	14	-0.56	13	2.00	23	4.71	15
Lambeth	3.32	15	-0.58	15	2.05	15	4.79	13
Guildford	3.17	16	-0.64	17	2.02	20	4.61	17
Windsor and Maidenhead	3.14	17	-0.67	21	2.06	12	4.65	16
Runnymede	3.07	18	-0.66	20	1.95	33	4.40	22
Welwyn Hatfield	3.06	19	-0.65	18	1.91	48	4.32	24
Ribble Valley	3.04	20	-0.64	16	1.87	66	4.24	26
Kingston upon Thames	3.01	21	-0.73	22	2.04	18	4.50	19
Wandsworth	2.97	22	-0.75	23	2.05	17	4.48	20
Stevenage	2.97	23	-0.66	19	1.83	79	4.11	28
Richmond upon Thames	2.96	24	-0.79	25	2.12	7	4.58	18
Woking	2.89	25	-0.76	24	1.99	25	4.31	25

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
St Albans	2.89	26	-0.79	26	2.06	13	4.42	21
Elmbridge	2.81	27	-0.83	29	2.05	14	4.34	23
East Hertfordshire	2.76	28	-0.82	27	1.96	28	4.15	27
Bromley	2.70	29	-0.84	30	1.95	34	4.08	29
Hounslow	2.66	30	-0.86	32	1.95	30	4.04	30
Cambridge	2.64	31	-0.83	28	1.87	63	3.90	34
Reigate and Banstead	2.63	32	-0.86	31	1.92	45	3.96	31
North Hertfordshire	2.58	33	-0.89	33	1.93	42	3.93	33
Bracknell Forest	2.46	34	-0.90	34	1.83	78	3.68	43
City of Edinburgh	2.43	35	-0.95	36	1.90	53	3.76	38
South Oxfordshire	2.43	36	-0.95	37	1.92	44	3.80	37
Vale of White Horse	2.41	37	-0.94	35	1.85	69	3.67	45
Winchester	2.39	38	-0.99	39	1.95	31	3.81	36
Cheltenham	2.35	39	-0.99	41	1.92	43	3.74	40
Harrow	2.35	40	-1.05	49	2.05	16	3.95	32
Lewisham	2.34	41	-0.98	38	1.88	60	3.64	47
Bristol, City of	2.32	42	-0.99	40	1.88	59	3.63	48
Tandridge	2.29	43	-1.00	42	1.88	61	3.60	49
Buckinghamshire	2.29	44	-1.03	46	1.94	37	3.71	42
Haringey	2.28	45	-1.04	48	1.95	29	3.72	41
Barnet	2.27	46	-1.07	51	2.02	21	3.82	35
Brentwood	2.26	47	-1.04	47	1.93	40	3.66	46
Epsom and Ewell	2.24	48	-1.06	50	1.95	35	3.67	44
Newham	2.24	49	-1.03	44	1.87	64	3.54	52
Waverley	2.23	50	-1.09	53	2.00	22	3.75	39
Aberdeen City	2.22	51	-1.03	45	1.85	71	3.50	55
East Renfrewshire	2.17	52	-1.02	43	1.77	106	3.32	69
Ealing	2.15	53	-1.11	58	1.95	32	3.60	50
Hart	2.09	54	-1.10	57	1.87	62	3.43	60

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Dacorum	2.09	55	-1.13	63	1.94	38	3.53	53
Warwick	2.08	56	-1.13	65	1.93	39	3.51	54
Surrey Heath	2.08	57	-1.11	59	1.89	56	3.44	57
Warrington	2.08	58	-1.09	54	1.85	73	3.37	68
Slough	2.08	59	-1.10	56	1.86	67	3.39	67
West Berkshire	2.07	60	-1.12	60	1.89	55	3.43	58
Milton Keynes	2.05	61	-1.12	61	1.88	58	3.40	62
Merton	2.04	62	-1.17	73	1.98	27	3.55	51
Uttlesford	2.04	63	-1.13	66	1.88	57	3.39	65
Oxford	2.03	64	-1.09	55	1.80	90	3.25	72
Epping Forest	2.03	65	-1.15	68	1.91	47	3.43	59
Hillingdon	2.02	66	-1.15	67	1.90	52	3.40	61
South Gloucestershire	2.01	67	-1.09	52	1.76	109	3.16	74
Manchester	2.01	68	-1.15	69	1.90	51	3.39	64
Trafford	2.01	69	-1.17	72	1.94	36	3.46	56
Waltham Forest	2.00	70	-1.16	70	1.91	50	3.40	63
Watford	1.95	71	-1.19	77	1.93	41	3.39	66
Enfield	1.93	72	-1.17	71	1.85	70	3.25	71
East Dunbartonshire	1.89	73	-1.13	64	1.72	133	2.99	85
Brighton and Hove	1.88	74	-1.22	81	1.91	46	3.31	70
Rugby	1.86	75	-1.18	75	1.81	88	3.11	76
Basingstoke and Deane	1.86	76	-1.17	74	1.79	92	3.08	79
Shetland Islands	1.85	77	-1.13	62	1.67	171	2.87	96
Chelmsford	1.83	78	-1.20	78	1.81	87	3.09	77
Cheshire East	1.83	79	-1.21	80	1.84	76	3.14	75
Tewkesbury	1.80	80	-1.19	76	1.76	112	2.98	88
Aberdeenshire	1.79	81	-1.20	79	1.78	102	2.99	84
Sevenoaks	1.76	82	-1.27	90	1.89	54	3.17	73
West Oxfordshire	1.74	83	-1.26	85	1.85	72	3.08	78

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Solihull	1.74	84	-1.22	82	1.77	105	2.95	90
Croydon	1.73	85	-1.25	84	1.82	84	3.02	81
Cherwell	1.71	86	-1.26	86	1.82	82	3.00	83
Sutton	1.71	87	-1.27	91	1.84	77	3.03	80
Havering	1.71	88	-1.25	83	1.79	93	2.95	91
Mid Sussex	1.70	89	-1.26	87	1.81	89	2.97	89
Rushcliffe	1.70	90	-1.27	89	1.82	83	2.99	87
Greenwich	1.69	91	-1.27	93	1.82	81	2.99	86
Fareham	1.66	92	-1.26	88	1.78	101	2.89	95
Brent	1.62	93	-1.32	98	1.87	65	3.01	82
Blaby	1.62	94	-1.27	92	1.74	119	2.79	99
Monmouthshire	1.61	95	-1.29	94	1.77	103	2.84	97
Horsham	1.58	96	-1.34	101	1.84	74	2.93	93
Stirling	1.57	97	-1.30	96	1.76	110	2.77	100
Fylde	1.56	98	-1.30	95	1.75	117	2.75	102
East Hampshire	1.55	99	-1.34	104	1.84	75	2.90	94
Central Bedfordshire	1.51	100	-1.33	99	1.75	113	2.72	103
Glasgow City	1.51	101	-1.32	97	1.74	121	2.69	106
York	1.50	102	-1.33	100	1.75	116	2.70	105
Bath and North East Somerset	1.50	103	-1.35	105	1.79	94	2.76	101
Redbridge	1.47	104	-1.41	115	1.91	49	2.94	92
Tunbridge Wells	1.45	105	-1.40	113	1.86	68	2.84	98
Tonbridge and Malling	1.45	106	-1.37	106	1.78	99	2.70	104
Coventry	1.41	107	-1.34	103	1.68	165	2.50	114
Spelthorne	1.40	108	-1.39	111	1.78	98	2.67	108
Barking and Dagenham	1.40	109	-1.39	110	1.77	108	2.64	109
South Ayrshire	1.37	110	-1.34	102	1.63	204	2.40	128
Rushmoor	1.35	111	-1.38	108	1.70	147	2.49	117

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Thurrock	1.35	112	-1.38	109	1.70	146	2.50	116
Dartford	1.35	113	-1.42	116	1.78	97	2.62	110
Wychavon	1.35	114	-1.43	120	1.81	85	2.68	107
Crawley	1.34	115	-1.37	107	1.66	176	2.42	126
Preston	1.31	116	-1.42	117	1.73	122	2.51	113
Huntingdonshire	1.30	117	-1.41	114	1.72	138	2.48	120
Malvern Hills	1.28	118	-1.43	118	1.73	123	2.48	119
Stroud	1.28	119	-1.45	125	1.78	100	2.56	112
Test Valley	1.25	120	-1.44	123	1.73	125	2.44	122
Cheshire West and Chester	1.25	121	-1.46	130	1.76	111	2.50	115
Cumberland	1.23	122	-1.39	112	1.60	235	2.22	151
Basildon	1.23	123	-1.44	124	1.71	145	2.39	129
Gravesham	1.23	124	-1.44	121	1.69	158	2.36	133
Adur	1.23	125	-1.45	126	1.72	132	2.41	127
Westmorland and Furness	1.22	126	-1.43	119	1.67	172	2.32	137
Broxbourne	1.22	127	-1.48	135	1.77	107	2.49	118
Bromsgrove	1.21	128	-1.51	151	1.83	80	2.58	111
Rutland	1.21	129	-1.46	128	1.71	141	2.39	131
Colchester	1.20	130	-1.46	131	1.71	144	2.37	132
Cardiff	1.20	131	-1.48	137	1.75	115	2.44	124
Bedford	1.19	132	-1.48	138	1.75	114	2.44	123
Stockport	1.19	133	-1.49	142	1.77	104	2.48	121
Hinckley and Bosworth	1.19	134	-1.46	129	1.70	149	2.35	134
South Derbyshire	1.18	135	-1.44	122	1.65	185	2.26	144
Leeds	1.16	136	-1.49	145	1.74	118	2.39	130
Worcester	1.15	137	-1.48	136	1.70	148	2.31	138
Eastleigh	1.14	138	-1.49	144	1.72	131	2.35	136
Wiltshire	1.14	139	-1.50	147	1.73	126	2.35	135
Derby	1.14	140	-1.46	132	1.64	195	2.21	154

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Southampton	1.13	141	-1.47	134	1.65	186	2.21	152
Rochford	1.13	142	-1.48	139	1.68	161	2.27	143
Orkney Islands	1.11	143	-1.45	127	1.61	231	2.13	164
East Devon	1.10	144	-1.49	146	1.68	162	2.24	147
Highland	1.10	145	-1.49	141	1.67	173	2.22	150
South Norfolk	1.10	146	-1.50	148	1.69	159	2.25	146
West Northamptonshire	1.08	147	-1.52	153	1.72	128	2.30	139
West Lothian	1.08	148	-1.49	143	1.65	189	2.17	158
Perth and Kinross	1.07	149	-1.50	149	1.67	175	2.19	155
Cotswold	1.07	150	-1.57	163	1.81	86	2.43	125
Bournemouth, Christchurch and Poole	1.07	151	-1.53	155	1.72	129	2.28	140
Salford	1.05	152	-1.54	158	1.73	127	2.27	141
Mid Suffolk	1.05	153	-1.50	150	1.64	191	2.14	163
Falkirk	1.05	154	-1.49	140	1.61	230	2.08	172
Lewes	1.05	155	-1.54	157	1.72	139	2.25	145
South Lanarkshire	1.03	156	-1.51	152	1.64	196	2.11	168
Wealden	1.02	157	-1.56	161	1.74	120	2.27	142
Portsmouth	1.01	158	-1.53	154	1.66	180	2.12	166
Knowsley	1.00	159	-1.47	133	1.51	302	1.88	190
Swindon	0.99	160	-1.53	156	1.64	198	2.08	171
Luton	0.99	161	-1.55	160	1.69	152	2.16	159
North Somerset	0.99	162	-1.56	162	1.71	143	2.19	156
Bexley	0.97	163	-1.57	164	1.71	140	2.18	157
Midlothian	0.95	164	-1.54	159	1.61	225	1.99	180
Charnwood	0.93	165	-1.57	165	1.68	167	2.09	170
West Suffolk	0.93	166	-1.58	166	1.69	151	2.12	165
New Forest	0.93	167	-1.59	171	1.72	136	2.15	161
Ashford	0.91	168	-1.61	174	1.73	124	2.16	160
Maidstone	0.91	169	-1.61	175	1.72	130	2.14	162

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Derbyshire Dales	0.91	170	-1.63	187	1.78	96	2.24	148
Braintree	0.90	171	-1.59	168	1.67	168	2.06	174
Stafford	0.90	172	-1.60	173	1.70	150	2.10	169
Chichester	0.89	173	-1.64	190	1.79	95	2.23	149
Herefordshire, County of	0.88	174	-1.62	180	1.72	135	2.11	167
Dorset	0.88	175	-1.61	176	1.69	155	2.06	173
South Staffordshire	0.87	176	-1.59	170	1.64	200	1.97	181
Chorley	0.86	177	-1.61	177	1.68	160	2.04	176
Worthing	0.86	178	-1.62	181	1.69	153	2.05	175
Liverpool	0.86	179	-1.61	178	1.68	166	2.02	177
Harborough	0.86	180	-1.66	196	1.79	91	2.21	153
Argyll and Bute	0.83	181	-1.59	172	1.62	218	1.90	189
Birmingham	0.81	182	-1.64	188	1.69	157	2.00	179
Na h-Eileanan Siar	0.81	183	-1.58	167	1.56	269	1.79	203
Harlow	0.80	184	-1.62	183	1.65	187	1.93	187
Mid Devon	0.80	185	-1.63	184	1.66	179	1.94	184
Norwich	0.79	186	-1.66	195	1.71	142	2.02	178
North Yorkshire	0.78	187	-1.65	192	1.67	169	1.95	183
Peterborough	0.77	188	-1.65	191	1.67	174	1.93	185
Flintshire	0.77	189	-1.62	182	1.61	227	1.84	196
North Warwickshire	0.77	190	-1.63	185	1.63	207	1.87	193
Medway	0.76	191	-1.64	189	1.64	197	1.88	191
North Ayrshire	0.75	192	-1.59	169	1.51	307	1.66	219
North Lanarkshire	0.74	193	-1.62	179	1.57	264	1.74	206
Havant	0.74	194	-1.65	194	1.64	194	1.87	194
Renfrewshire	0.74	195	-1.63	186	1.60	234	1.79	201
Castle Point	0.73	196	-1.65	193	1.63	209	1.83	197
Newcastle upon Tyne	0.72	197	-1.67	198	1.66	181	1.87	192
Bury	0.72	198	-1.70	205	1.72	137	1.97	182

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Exeter	0.71	199	-1.69	203	1.69	156	1.92	188
Somerset	0.71	200	-1.67	199	1.65	190	1.85	195
North Tyneside	0.69	201	-1.67	197	1.62	215	1.79	202
Lichfield	0.67	202	-1.72	215	1.72	134	1.93	186
Newport	0.66	203	-1.67	200	1.60	232	1.73	207
North Northamptonshire	0.65	204	-1.70	209	1.66	182	1.80	200
Canterbury	0.63	205	-1.71	210	1.65	183	1.79	204
East Staffordshire	0.62	206	-1.70	207	1.62	213	1.73	208
Sheffield	0.62	207	-1.70	208	1.62	216	1.72	210
Amber Valley	0.61	208	-1.70	206	1.61	228	1.69	212
South Kesteven	0.61	209	-1.74	222	1.69	154	1.83	198
North West Leicestershire	0.61	210	-1.73	219	1.68	163	1.81	199
East Suffolk	0.59	211	-1.71	211	1.61	223	1.68	215
King's Lynn and West Norfolk	0.59	212	-1.67	201	1.53	291	1.54	232
Newark and Sherwood	0.59	213	-1.71	212	1.61	226	1.68	216
South Ribble	0.59	214	-1.72	217	1.64	199	1.73	209
Shropshire	0.58	215	-1.74	223	1.66	177	1.75	205
Chesterfield	0.57	216	-1.71	213	1.59	242	1.63	223
Clackmannanshire	0.57	217	-1.69	202	1.54	285	1.54	233
Fife	0.57	218	-1.70	204	1.55	276	1.56	228
East Riding of Yorkshire	0.55	219	-1.73	220	1.62	210	1.67	217
Dover	0.54	220	-1.72	214	1.57	265	1.56	229
Erewash	0.53	221	-1.75	224	1.62	214	1.65	221
Maldon	0.52	222	-1.77	229	1.66	178	1.70	211
Thanet	0.52	223	-1.75	225	1.63	206	1.65	220
North East Derbyshire	0.52	224	-1.72	216	1.56	268	1.54	236
Halton	0.52	225	-1.73	218	1.58	253	1.56	230
Folkestone and Hythe	0.50	226	-1.76	227	1.62	212	1.62	224
High Peak	0.49	227	-1.78	237	1.67	170	1.69	213

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
East Cambridgeshire	0.49	228	-1.78	236	1.65	184	1.66	218
East Lothian	0.49	229	-1.76	226	1.61	224	1.59	226
Calderdale	0.49	230	-1.78	235	1.64	192	1.64	222
Southend-on-Sea	0.47	231	-1.80	244	1.68	164	1.69	214
Broadland	0.47	232	-1.78	234	1.62	211	1.59	225
Barnsley	0.47	233	-1.74	221	1.53	287	1.44	245
Redditch	0.46	234	-1.77	230	1.60	236	1.55	231
Cannock Chase	0.45	235	-1.76	228	1.58	247	1.52	237
Telford and Wrekin	0.43	236	-1.77	232	1.58	252	1.49	240
Wolverhampton	0.43	237	-1.79	241	1.61	222	1.54	234
Pembrokeshire	0.42	238	-1.78	233	1.57	258	1.47	242
North Kesteven	0.41	239	-1.78	239	1.58	245	1.48	241
Swansea	0.39	240	-1.79	240	1.57	267	1.43	247
Forest of Dean	0.39	241	-1.82	248	1.63	205	1.54	235
Oadby and Wigston	0.39	242	-1.83	250	1.65	188	1.56	227
Dundee City	0.38	243	-1.79	243	1.57	256	1.43	246
Ashfield	0.36	244	-1.77	231	1.49	317	1.29	264
Dudley	0.36	245	-1.81	246	1.58	249	1.43	249
Wrexham	0.35	246	-1.79	242	1.54	282	1.36	255
Teignbridge	0.34	247	-1.84	258	1.63	208	1.49	239
Stockton-on-Tees	0.34	248	-1.82	249	1.59	241	1.43	248
Inverclyde	0.34	249	-1.78	238	1.50	314	1.28	266
Leicester	0.34	250	-1.85	261	1.64	201	1.50	238
Scottish Borders	0.33	251	-1.83	251	1.59	240	1.43	250
Vale of Glamorgan	0.33	252	-1.84	254	1.61	220	1.46	243
Bridgend	0.31	253	-1.80	245	1.52	299	1.28	265
West Lancashire	0.31	254	-1.84	259	1.59	239	1.40	251
Staffordshire Moorlands	0.28	255	-1.84	255	1.56	272	1.32	260

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
West Lindsey	0.28	256	-1.84	256	1.56	274	1.32	262
Lancaster	0.28	257	-1.84	260	1.57	262	1.34	258
Breckland	0.27	258	-1.84	257	1.55	277	1.30	263
Eastbourne	0.27	259	-1.83	252	1.52	296	1.25	270
South Hams	0.26	260	-1.88	273	1.64	193	1.45	244
East Ayrshire	0.26	261	-1.83	253	1.52	297	1.25	272
Wirral	0.25	262	-1.86	264	1.58	251	1.34	257
Bolsover	0.25	263	-1.81	247	1.47	330	1.16	287
Ceredigion	0.25	264	-1.86	266	1.58	250	1.34	259
Isle of Anglesey	0.23	265	-1.85	262	1.53	288	1.24	275
Babergh	0.23	266	-1.89	275	1.62	217	1.38	253
Northumberland	0.22	267	-1.86	265	1.54	281	1.24	273
Rother	0.21	268	-1.90	280	1.63	202	1.38	252
Kirklees	0.21	269	-1.89	276	1.61	229	1.34	256
Ipswich	0.20	270	-1.88	271	1.56	271	1.26	269
Angus	0.20	271	-1.87	268	1.54	280	1.23	276
Melton	0.19	272	-1.91	284	1.63	203	1.37	254
Wakefield	0.19	273	-1.87	267	1.53	289	1.20	280
Gloucester	0.19	274	-1.89	274	1.57	261	1.26	268
Hyndburn	0.18	275	-1.85	263	1.49	320	1.13	293
Nottingham	0.17	276	-1.91	285	1.61	221	1.32	261
Broxtowe	0.17	277	-1.91	281	1.59	243	1.28	267
North Lincolnshire	0.16	278	-1.88	272	1.53	293	1.17	285
Dumfries and Galloway	0.16	279	-1.87	270	1.51	309	1.13	291
Plymouth	0.15	280	-1.87	269	1.49	318	1.10	297
Torridge	0.14	281	-1.90	279	1.55	275	1.19	281
Swale	0.13	282	-1.92	287	1.57	257	1.21	278
Sefton	0.12	283	-1.92	289	1.57	259	1.21	279
Torfaen	0.12	284	-1.90	277	1.52	294	1.13	292

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Wyre Forest	0.12	285	-1.93	291	1.60	237	1.25	271
West Devon	0.11	286	-1.93	290	1.59	244	1.22	277
Powys	0.11	287	-1.94	292	1.60	233	1.24	274
Lincoln	0.10	288	-1.91	282	1.52	298	1.10	298
West Dunbartonshire	0.09	289	-1.90	278	1.49	319	1.04	301
Darlington	0.08	290	-1.94	293	1.57	255	1.17	284
Hastings	0.07	291	-1.94	294	1.58	254	1.17	283
Mansfield	0.07	292	-1.92	286	1.51	311	1.05	300
Bradford	0.07	293	-1.95	296	1.57	260	1.16	288
Oldham	0.06	294	-1.95	297	1.57	263	1.15	289
Blackburn with Darwen	0.06	295	-1.94	295	1.56	270	1.14	290
Cornwall	0.05	296	-1.96	302	1.58	248	1.16	286
Redcar and Cleveland	0.04	297	-1.92	288	1.48	326	0.99	305
Neath Port Talbot	0.04	298	-1.91	283	1.46	335	0.96	310
Middlesbrough	0.04	299	-1.95	298	1.56	273	1.11	295
Arun	0.03	300	-1.96	301	1.57	266	1.12	294
Bolton	0.01	301	-1.99	309	1.62	219	1.19	282
Tamworth	0.00	302	-1.96	303	1.53	286	1.04	303
Doncaster	-0.01	303	-1.97	305	1.54	283	1.04	302
Denbighshire	-0.01	304	-1.97	304	1.53	292	1.01	304
Rossendale	-0.02	305	-1.99	311	1.58	246	1.11	296
Stoke-on-Trent	-0.02	306	-1.96	299	1.51	312	0.97	306
Walsall	-0.05	307	-1.98	306	1.51	304	0.96	308
Gosport	-0.05	308	-1.96	300	1.47	328	0.90	315
Gateshead	-0.06	309	-1.99	308	1.52	295	0.97	307
Tendring	-0.07	310	-1.98	307	1.50	315	0.93	312
North Devon	-0.09	311	-2.03	317	1.59	238	1.06	299
Bassetlaw	-0.10	312	-2.01	314	1.54	284	0.96	309
Gwynedd	-0.10	313	-2.00	312	1.50	313	0.90	313

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Moray	-0.12	314	-2.01	313	1.51	310	0.89	317
Great Yarmouth	-0.12	315	-1.99	310	1.47	333	0.82	321
Carmarthenshire	-0.13	316	-2.02	315	1.51	306	0.89	316
Wyre	-0.14	317	-2.04	319	1.55	279	0.93	311
Gedling	-0.19	318	-2.06	325	1.55	278	0.90	314
Nuneaton and Bedworth	-0.19	319	-2.03	318	1.49	322	0.80	322
Newcastle-under-Lyme	-0.19	320	-2.05	321	1.52	300	0.84	318
Kingston upon Hull, City of	-0.19	321	-2.02	316	1.46	334	0.75	324
Sandwell	-0.20	322	-2.05	322	1.51	303	0.83	320
Rochdale	-0.20	323	-2.05	323	1.52	301	0.83	319
North East Lincolnshire	-0.21	324	-2.04	320	1.47	331	0.75	325
St. Helens	-0.25	325	-2.07	327	1.51	305	0.79	323
Rhondda Cynon Taf	-0.29	326	-2.06	324	1.44	342	0.62	329
South Tyneside	-0.30	327	-2.07	326	1.45	339	0.64	326
Hartlepool	-0.32	328	-2.08	328	1.46	337	0.63	328
Caerphilly	-0.37	329	-2.10	329	1.45	340	0.58	335
County Durham	-0.39	330	-2.12	330	1.47	332	0.60	332
Wigan	-0.41	331	-2.14	331	1.48	324	0.60	333
Conwy	-0.42	332	-2.15	335	1.51	308	0.64	327
Torbay	-0.43	333	-2.14	333	1.48	327	0.57	336
North Norfolk	-0.43	334	-2.16	337	1.50	316	0.61	331
Tameside	-0.44	335	-2.16	336	1.49	321	0.58	334
Rotherham	-0.44	336	-2.15	334	1.47	329	0.56	337
Fenland	-0.44	337	-2.14	332	1.45	338	0.52	338
Pendle	-0.48	338	-2.19	339	1.53	290	0.62	330
Blackpool	-0.54	339	-2.18	338	1.44	341	0.41	341
Isle of Wight	-0.59	340	-2.23	343	1.49	323	0.45	339
South Holland	-0.59	341	-2.23	344	1.48	325	0.44	340
Sunderland	-0.63	342	-2.22	342	1.41	344	0.29	343

	Long-Run		Bust		Recovery		Boom	
	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank	Annual Growth Rate	Rank
Boston	-0.64	343	-2.21	341	1.39	345	0.25	344
East Lindsey	-0.65	344	-2.23	345	1.43	343	0.31	342
Blaenau Gwent	-0.67	345	-2.21	340	1.35	347	0.15	346
Burnley	-0.80	346	-2.31	346	1.46	336	0.22	345
Merthyr Tydfil	-0.90	347	-2.33	347	1.38	346	0.00	347

About the Report and the Authors

This report is the thirteenth edition of the UK Competitiveness Index (UKCI), which was first published by Cardiff University in 2000. The 2026 edition of the UKCI is a collaboration between Cardiff University's City Region Co-Lab, which is hosted by the School of Social and Spatial Sciences, and Nottingham Business School at Nottingham Trent University along with the Department of Accountancy, Finance and Economics at Birmingham City University.

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