Rebalancing the economy: time to seize the opportunity

EY UK region and city economic forecast

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Building a better working world

EY UK region and city economic forecast

Our reports provide the latest UK economic forecast and examine the current economic trends and outlook for the next three years in 12 regions and 30 cities across the UK. They represent a detailed and directly comparable analysis of UK economic performance at a regional and city level. This report is part of our Economics for Business programme, which provides knowledge, analysis and insight to help businesses understand the economic environments in which they operate.

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Foreword

Mark Gregory
EY Chief Economist UK&I
economics@uk.ey.com

@MarkGregoryEY

uk.linkedin.com/in/markgregoryuk

I'm delighted to welcome you to the second edition of our UK region and city economic forecast, our series monitoring the progress on geographic rebalancing of the UK economy. We believe that this forecast, together with our UK Attractiveness Surveys and our regular EY ITEM Club forecasts, provide valuable insights to help businesses and policy makers to successfully navigate what could be a challenging medium-term economic outlook.

It has been a very full 12 months since our last full region and city forecast, with the EU referendum, David Cameron's resignation and the appointment of a new Prime Minister amongst the more significant events. The new Prime Minister has made clear her desire for a significant shift in the direction of economic policy and the Chancellor of the Exchequer provided the first hints of what this might look like in the Autumn Statement.

The UK has embarked on a concerted move from a centralised model towards the devolution of political and economic decision-making to the UK's regions and cities. The signs are that this will continue but will be influenced by the new Government agenda:

- The desire of the Prime Minister to create an economy that works for everyone
- The development of an industrial strategy
- The negotiations on the terms of the UK leaving the EU and on securing future trade agreements

This changing landscape means, therefore, that it is even more important to continue to monitor economic developments at regional and city levels and to analyse the potential implications of emerging economic, industrial and trade policy for all parts of the UK. It is vital that all stakeholders – national and regional government, policymakers, companies, inward investment agencies, media organisations, voters and more – understand what is happening in local economies across the country and how future developments might influence this outlook.

This report draws on our long-standing relationship with EY ITEM Club. The EY ITEM Club UK Autumn forecast is the starting point for our analysis of the current economic trends and outlook for the next three years in 12 regions and 30 cities across the UK. This is almost double the number of cities we covered in our first report and reflects the popularity and interest in our analysis from cities not included in our earlier efforts.

Our report last year identified how national policy initiatives may work against regional activity and hence there is a clear need to ensure national and regional economic policies are designed to complement each other, especially in key areas such as public expenditure reform, manufacturing, technology and trade. This is even more marked as a result of the UK's decision to leave the EU and the deterioration in the UK economic outlook. The UK needs to rebalance geographically more than ever to maximise our economic potential.

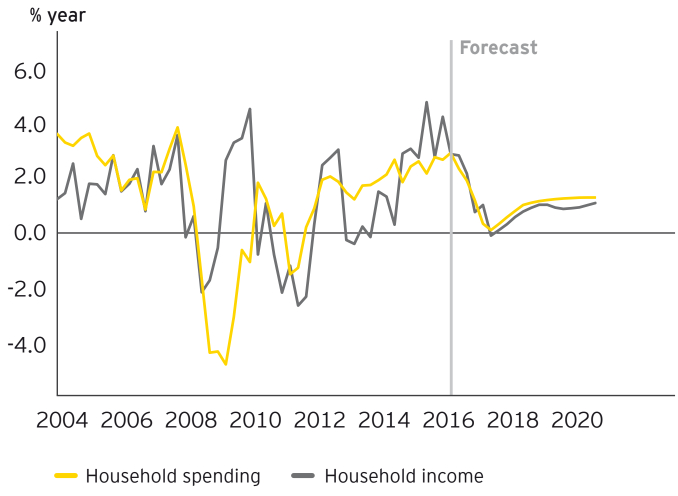
A slowing economy

All change at the national level ...

We are told that a week is a long time in politics, but it is certainly true that a year can be a long time in economics. The recent EY ITEM Club UK Autumn forecast shows just how much the outlook for the UK has changed since this time last year.

The vote by the UK electorate to leave the EU is often cited as the reason for the forecast slowdown in economic activity but the reality is that a number of factors are at play. Whatever the causes, it is clear that the combination of low inflation and rising employment and average earnings that made 2015 a bumper year for UK consumer spending is fading fast. 2017 is set to be much tougher for consumers, with higher inflation, subdued average earnings growth and welfare reforms such as the cap on benefit cap entitlements, leading to slower income growth. EY ITEM Club expect employment growth to slow to just 0.2% in 2017 before falling in 2018 with an associated negative impact on consumer spending.

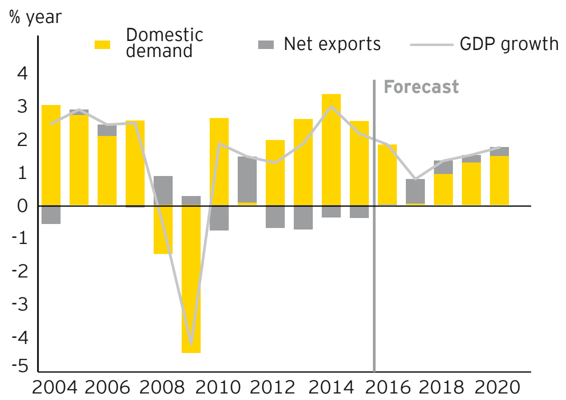
UK: Real household income and spending



Source: *EY ITEM Club*

Lower consumer demand growth, together with the increased uncertainty the UK faces in the short-term on its future relationship with the EU, means that business investment is expected to be lower than previously forecast. The increased capital spending by government on infrastructure and the support for housebuilding announced in the Autumn Statement should stimulate UK fixed investment but overall the contribution of the domestic economy to growth will be lower than we thought it would be at this time last year. GDP growth in 2017 will be dependent on net export growth and EY ITEM Club forecast that UK GDP will expand by just 0.8% in 2017 and 1.4% in 2018.

UK: Contributions to GDP growth



Source: *EY ITEM Club*

... with direct consequences at the regional level.

The economic changes at the national level will have clear regional impacts. No region or city will be immune from the consequences and economic growth will be lower across the country.

There will, however, be significant variations in the impact of the projected lower overall growth across the UK's regions and cities. Individual sectors of the economy will grow at different rates and hence the existing economic structure of a local area and its relative exposure to different sectors will influence outturns, as will other externally driven factors such as migration.

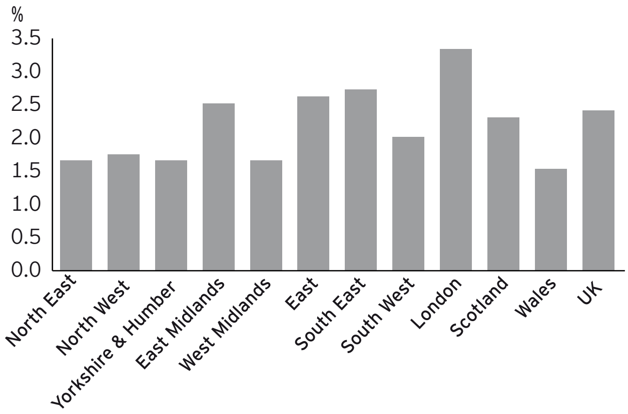
As we discussed in our last report, Government policy is also a major driver of regional outcomes. The Autumn Statement confirmed the thrust of policy is to reshape the economy in parallel with ensuring a successful Brexit over the next few years. The design of the industrial strategy and the impact of moves to create fairer economic outcomes, including the approach to public expenditure and taxation, will be the key drivers of future economic performance at the regional and city level.

Any sign of rebalancing?

Pockets of growth ...

Our analysis confirms that London and the South East have been the fastest-growing regions of the UK economy since 2013: we expect this to continue in 2016 with London's GVA[1] forecast to grow by 3.2% for 2016 as a whole, and the South East's by 2.9%, compared with the UK's projected outturn GVA growth of 2%. But it is not just London that is growing faster than the UK average. The East and East Midlands have also grown in excess of the national average rate since 2013.

Annual average GVA growth 2013-2015



Source: *EY ITEM Club*

Our forecast for 2016 suggests that Yorkshire and Humber, Wales and the West Midlands are all also likely to outperform the UK as a whole on GVA with growth rates above 2%.

- The expansion in the West Midlands has been driven in part by the traditionally dominant sectors of manufacturing and logistics. The relatively strong performance of professional and administrative services has also been a significant contributory factor in 2016.
- In Yorkshire and Humber, a number of sectors have contributed to growth this year. Professional and administrative services, logistics, construction and real estate, financial services and manufacturing have all grown faster than the UK average outside of London.

1 *Gross Value Added (GVA). GVA data is presented in 2013 prices and excludes output from the 'extra region' i.e., the contribution from North Sea oil and gas extraction, UK embassies abroad and UK forces stationed overseas. The latter are included in the GDP definition used in the EY macroeconomic forecasts*

What is GVA?

Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK. GVA is used in the estimation of Gross Domestic Product (GDP).

What is it used for?

GVA (at current basic prices; available by industry only) plus taxes on products (available at whole economy level only) less subsidies on products (available at whole economy level only) equals GDP (at current market prices; available at whole economy level only).

GVA + taxes on products − subsidies on products = GDP.

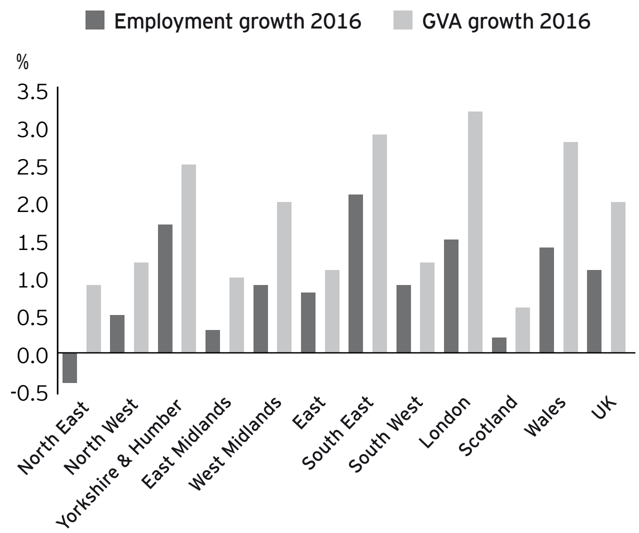
Source: Office for National Statistics website – http://www.ons.gov.uk/

- Wales is benefitting in 2016 from faster than average manufacturing growth and strong growth in professional and administrative services and construction. By contrast, public sector spending has not fallen as rapidly as in some other regions, though this may not be the case from 2017 onwards.

… but many regions are experiencing a slowdown …

The analysis does however also serve to illustrate the challenges facing the UK economy in the short to medium-term. The forecast outturn for 2016 is for a significant slowdown in the North East, North West, East Midlands, East, South West and Scotland. In the case of Scotland, the challenges facing the oil and gas sectors are a significant factor. Elsewhere, a fall in public expenditure is a consistent theme, together with slowdowns in construction and real estate which have been experienced in most regions.

Employment and GVA growth by region



Source: EY ITEM Club

… and we expect more challenges ahead …

The UK's 12 nations and regions divide equally between: 6 in which companies report faster output growth in October 2016 compared with a year earlier, (according to the 'Lloyds Bank Regional Purchasing Managers' Index (PMI)' complied by IHS Markit); and 6 which report slower growth.

The regions reporting the most marked slowdowns are London and the East Midlands. They are very different to one another, but they may share particular concerns over Brexit, and access to EU markets — for financial services in London's case, and for aerospace and machinery for the East Midlands'. Both may also have failed to benefit from sterling's fall, either because their companies are particularly likely to price in dollars or euros, or in the case of the East Midlands, because they are heavy buyers of imported components and supplies.

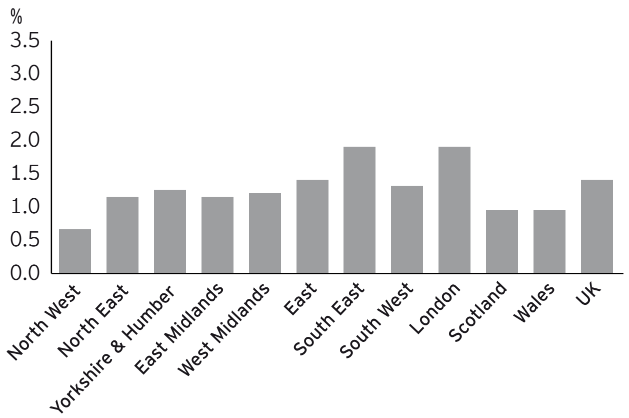
… even for the 'Southern Powerhouse'…

Looking forward, our forecasts largely point to several challenging years. We expect that London and the South East will continue to outperform all other UK regions through to 2019, with growth averaging 1.9% compared to UK average annual GVA growth of 1.5%. However, this growth will significantly be below London and the South East average annual growth of 3.4% and 2.7% respectively between 2013-2015.

In London, real estate, professional services and retail are forecast to grow in 2017-2019 at less than half the rate achieved from 2013-2015. This is similar to the South East, albeit the decline in growth will not be quite as severe.

The East of England, South West and Yorkshire and Humber will be the other fastest growing regions but all three will grow at just below the UK average rate.

Annual average GVA growth, 2017—2019



Source: *EY ITEM Club*

We expect that the weakest parts of the UK in terms of GVA growth will be the economies on the country's geographical periphery: the three devolved nations of Scotland, Wales and the North East. The traditional English industrial heartlands such as the North West, West Midlands and Yorkshire and Humber will occupy an intermediate position between the two extremes, both economically as well as geographically — perhaps underlining the fact that geographical position and accessibility within the UK do seem to affect the level of economic activity on a consistent basis.

… but there will be no acceleration in rebalancing …

Slower growth in London and the South East does not have a silver lining for the rest of the country. Forecast growth will be lower across the country as a whole and there will be no closing of the gap with London and the South East, just a slowing of the rate of increasing disparity. All service sectors slow and this has an impact across the country but more so in London and the South East. Elsewhere the expected slowdown in manufacturing, a fall in construction activity and the continued squeeze on public expenditure explain the lower forecast growth for the North, Midlands and Devolved Administrations.

… hence the need is for more action.

The regional analysis shows us how different factors drive relative economic performance across the UK. What is clear is that the economic slowdown and the additional challenges posed by the need to prepare for a successful Brexit mean that even more resources and effort have to be devoted to driving geographic rebalancing and hence boosting overall growth.

The need is more urgent: the UK must look to drive economic growth and boost productivity. This means we cannot afford to waste our talent. We need every part of the country to provide the maximum possible contribution and policy should be designed to make this possible.

Spotlight on:

The labour and housing markets

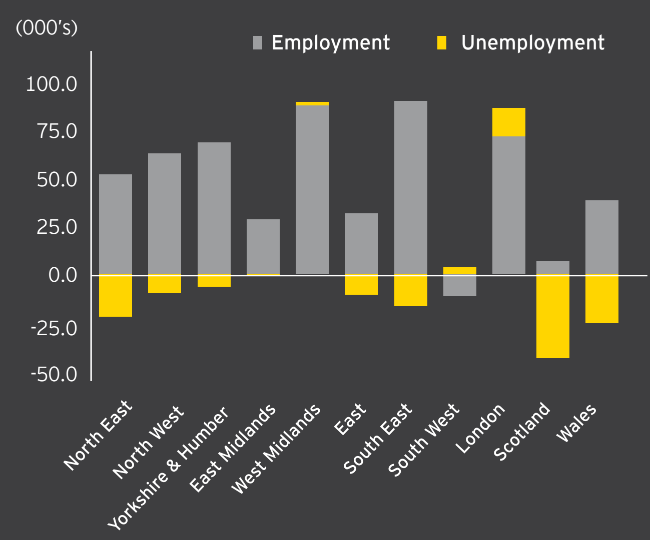
In each edition of our UK region and city economic forecast, we examine a topical issue from an economic perspective. For this report, we've chosen two interrelated issues that are close to the top of the post-referendum political agenda: labour and housing.

To analyse the regional trends in these vital aspects of the economy, the first step is look at relative economic growth rates. As referenced earlier, the UK's nations and regions are currently evenly divided between those in which companies reported faster output growth in October 2016 compared with a year earlier, and those which reported slower growth ('Lloyds Bank Regional PMI' compiled by IHS Markit). The most marked slowdowns were London and the East Midlands, while companies in Scotland reported the weakest growth of any nation or region. In contrast, three regions with important manufacturing sectors reported sharp accelerations in output growth – the West Midlands, the North East and, most markedly, the North West.

The latest Labour Force Survey (LFS) data reinforces some of these messages, including strong performances over the previous year by the West Midlands and Yorkshire and Humber. And in London, the slowdown in activity reported by businesses has been accompanied by a rise in unemployment. Whilst lacklustre employment in Scotland is consistent with that nation's weak PMI reading, a much larger fall than the other regions in Scottish unemployment implies the situation is not straightforward. According to the LFS, the South West is the only region to suffer a net loss of jobs in the year to August 2016.

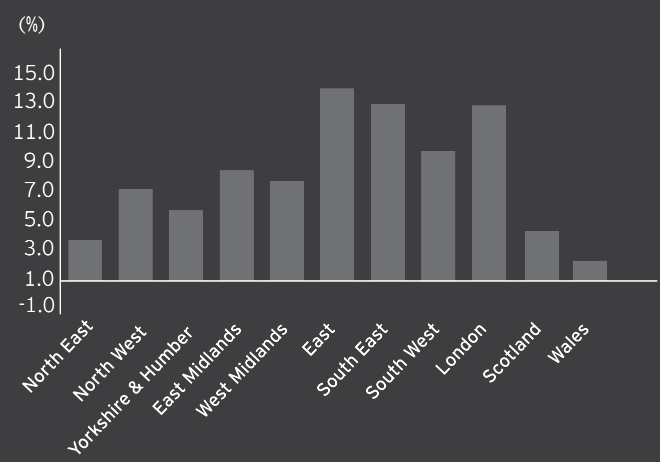
House prices provide an alternative perspective on economic activity at a regional level. The four southern regions show the largest price gains in the year to August, with the East of England (which includes Cambridge) slightly in the lead. The three devolved nations, plus the North East, report the slowest increases – illustrating how proximity to London continues to influence the market.

Change on year, Jun-Aug 2015 to Jun-Aug 2016



Source: ONS

House prices, change on year to Aug 2016



Source: ONS

UK's city performance: not a simple 'North-South divide'

Strong performance by some southern cities ...

In general over the 2017-19 period, cities in southern England (outside London) are set to out-perform those in the rest of the UK. Reading tops the growth league for both employment and GVA, with average annual rises of 0.9% and 2.5% respectively. Digital, the UK's fastest growing sector, accounts for 25% of Reading's GVA, and this together with growth in other services, explains the strong performance. Cambridge, Oxford, Milton Keynes and the Thames Valley are also likely to do particularly well, at least as far as GVA growth is concerned, again thanks to their strength in the digital and scientific sectors.

Northern English and Midlands cities mostly do less well, and indeed we forecast that several are likely to experience falls in employment. Beyond England, the strongest growth in the cities we cover in this report occurs in Edinburgh and Cardiff. The former is expected to experience a 0.3% per year employment rise, and 1.6% for GVA. The latter will see GVA grow by 1.6% and employment by 0.1% annually. Edinburgh has a highly educated workforce and is both a capital city and an important centre for financial and business services, as well as being a major tourist destination. Cardiff is expected to benefit from strong growth in digital and professional services, also reflecting its capital city role in part.

At first sight, this projection might appear to confirm that the UK's cities are set to fit in with a general widening of the 'North-South divide'. Newcastle, Hull and Liverpool all face a challenging outlook as is the case for the north eastern cities. And Birmingham is also expected to lag the country as a whole. A significant factor in this pattern of slower growth is the impact of slower growth in manufacturing which remains a key component of many UK local economies.

Employment and GVA outlook 2016-2019

	Total employment		GVA (£m, 2013)
City/city region	2016 (000s)	% Growth 2017-2019	% Growth 2017-2019
Newcastle	195.9	-0.4	0.8
Liverpool	254.1	-0.2	1.1
Manchester	390.5	0.7	2.0
Hull	132.6	-0.4	1.0
Leeds	493.8	0.3	1.7
Birmingham	553.5	-0.1	1.2
Stoke-on-Trent	125.1	-0.5	0.8
Cambridge	111.0	0.2	1.8
Luton	98.0	0.2	1.4
Reading	115.2	0.9	2.5
Southampton	133.4	0.4	1.6
South Coast	1,033.7	0.1	1.6
Thames Valley	1,208.3	0.5	2.1
Bristol	294.5	0.3	1.6
Exeter	100.6	0.4	1.8
Belfast	239.8	-0.1	1.2
Aberdeen	191.6	-0.7	0.8
Dundee	79.1	-0.6	0.6
Edinburgh	349.5	0.3	1.6
Glasgow	430.3	0.0	1.3
Inverness	49.1	-0.5	0.9
Perth and Kinross	77.4	-0.3	1.1
Stirling	52.8	-0.2	1.0
Sunderland	129.1	-0.9	0.6
Sheffield	846.9	-0.3	1.1
Oxford	135.1	0.2	1.7
Cardiff	229.2	0.1	1.6
Portsmouth	123	0.1	1.5
Cornwall	266.1	0.0	1.3
Milton Keynes	189	0.5	2.0
Tees Valley	300.7	0.0	-0.6
UK	**34,308**	**0.0**	**1.5**

Source: *EY ITEM Club*

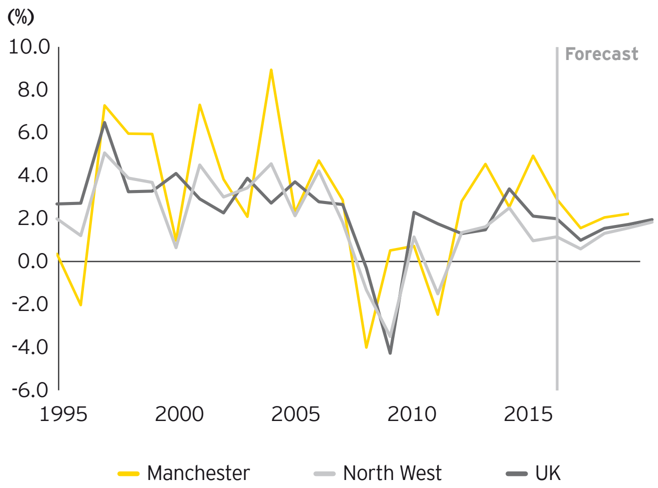
... but there are exceptions to the rule ...

However, the reality is more complex. Leeds and especially Manchester do not conform to the general pattern; indeed we forecast that the latter will experience the second fastest employment growth of all the cities that we cover (0.7% a year over the 2017-19 period), reflecting the transformation that has occurred in perceptions of the city, and significant investment in key assets.

We estimate that Manchester GVA is growing by 3.0% in 2016, significantly outpacing the North West (1.2%) and UK (2.0%). Looking ahead to the 2017-2019 period, we expect average GVA growth to slow to 2.0%, accompanied by employment growth of 0.7%; however this will still be faster than the UK's and North West's regional average rates of growth. The administration and support, real estate, arts, entertainment and recreation and professional services sectors are all set to enjoy employment growth equal to, or above, 1.8% per year. That will soften the blow of losses elsewhere, particularly in manufacturing and public administration.

Manchester

GVA growth, 1995-2019



Source: *EY ITEM Club*

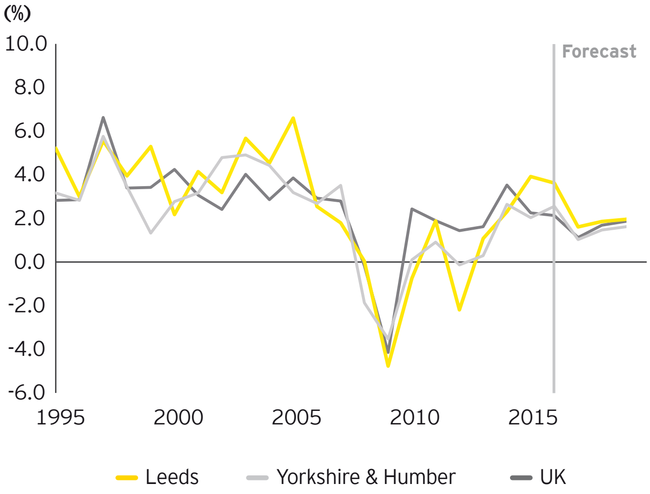
We estimate that employment in Leeds has risen by 2.5% in 2016, equivalent to 12,000 new jobs. This rate of growth places the city significantly ahead of Yorkshire and Humber (1.7%) and the UK (1.1%). Sector-wise, administration and support and wholesale and retail are likely to have enjoyed the most significant growth over the year, with an additional 2,600 and 2,100 jobs respectively.

Looking ahead to the 2017-2019 period, GVA growth in Leeds is expected to average 1.7% annually, outpacing both Yorkshire and Humber (1.3%) and the UK (1.5%).

Leeds is expected to achieve jobs growth of 0.3% per year between 2017 and 2019, bucking the wider regional trend of falling employment. Losses from public administration and manufacturing are likely to be more than offset by strong outturns in the professional services and administration and support sectors.

Leeds

GVA growth, 1995-2019



Source: *EY ITEM Club*

… illustrate both the opportunity and challenge …

These findings clearly highlight that the more disaggregate the geographic level we analyse economic performance at, the more insight we develop into how policy and different industrial structures influence economic performance. The comparison of some of the fastest growing cities across the regions cited above really brings this point home.

The performance of Reading, Cambridge and several other southern cities illustrates the importance of sectors in determining performance in the short to medium term. We forecast that the GVA of information and communications and professional services will grow by 11% and 10% in total respectively over the next three years. By contrast, manufacturing will only grow by 2% over the period. This translates into strong performance for Reading, where the information and communications sector accounts for more than twice as large a share of GVA as the national average, and Cambridge where professional services account for twice as much of local GVA as the national average.

But it is also clear that geographic location is not a binding constraint. The strong GVA performance both historic and projected for Manchester and Leeds reflect a number of factors. In Manchester's case this includes the substantial investments made over more than a decade in revitalising the city centre and the surrounding business infrastructure, and a clear positive reputational effect. Leeds has also benefitted from focused initiatives in the city centre allowing it to exploit its diversified local economy and ensuring it is not exposed to a slowdown in a single sector.

Manchester and Leeds show how targeted initiatives can drive superior growth and clearly illustrate the opportunity geographic rebalancing presents. National economic success requires a clear industrial strategy that is based around priority sectors and tightly integrated with regional and city growth plans.

However, the success of Manchester and Leeds highlights another challenge; the power of cities, especially the larger ones. As we identified in our UK Attractiveness survey 2016[2], cities are becoming increasingly important as sources of economic activity. Manchester, Leeds and Edinburgh are all emerging as destinations for technology investors, a major potential shift in geographic focus for this sector which has traditionally been centred on the South East especially the M4 corridor. However, modern technology companies recognise that their workforces are attracted to city centre living and hence their location decisions are shifting.

This is an opportunity for geographic rebalancing to an extent, but also a potential issue as it risks a concentration of activity in a small number of stronger cities. The national approach to geographic rebalancing must identify how to ensure that smaller cities and the more remote parts of regions can benefit from the success of the faster growing cities. Improved connectivity, both physical and digital, will be critical in ensuring the economy is one in which everyone has a chance to participate fully regardless of location.

2 *'Positive rebalancing?', EY 2016 UK attractiveness report*

Rebalancing the economy: time to seize the opportunity

Rebalancing is more important than ever …

As both EY ITEM Club and the OBR's most recent UK forecasts make clear, the UK economy is entering a challenging period as we prepare to make a success of leaving the EU. This means that the case for driving geographic rebalancing to maximise the potential of all the UK's regions and cities, moving the country to a higher sustainable rate of economic growth, is stronger than ever. Brexit makes this policy even more important both to maximise growth but also to support the UK's transformation to be in a position to prosper after Brexit.

… but the pace of change is not increasing …

In this context, we believe our economic forecasts for the UK's regions and cities provide a lot of food for thought — not least for government policymakers seeking to stimulate a faster and more balanced pattern of growth across the UK, and for local, regional and city authorities seeking to claim their fair share of that growth.

Our projection is that with some notable exceptions, primarily among the major northern cities, the North-South divide is set to widen slightly over the next three years. The potential of targeted initiatives is clear but at the current pace, the drive for rebalancing will take years to have a noticeable impact. In the meantime, other policy initiatives, such as reduction in welfare allowances, will potentially drive the economy in the other direction.

… time for a new push …

The Government has made clear that is believes the UK needs an industrial strategy. We see this as an extremely positive development. It is also opportune, the world economy is changing and the UK has a once in a generation opportunity to reposition itself in a world of changing trade dynamics and technology led disruption. At its core, the industrial strategy must articulate a vision for the linkages between priority sectors and the UK's regions and cities. This will provide the basis for prioritising the policy initiatives required to create faster economic growth.

... with sectors to the fore.

This report has demonstrated how sectors are a key driver of economic outcomes and hence how the existing sector mix of a geographic area has a significant impact on short to medium-term economic performance. Our analysis of the sector outlook and the make-up of local economies across the UK has allowed us to identify the priority sectors to drive UK growth and geographic rebalancing. The key sectors in this context are:

- Manufacturing remains a key element of the economy of many regions and cities of the UK, especially outside of the South East — the resurgence in the Midlands shows what is possible. Our report on reshoring manufacturing demonstrated that the UK has a once in a generation chance to capture share in selected industries as the world economy changes. Automotive is an industry with opportunities in electric vehicles and autonomous driving but other capital intensive industries such as machinery, electronics, food and drink and chemicals all offer opportunity to boost exports and to substitute imports, something that is more urgent following the fall in the value of sterling.
- It is clear that technology will be a key component of UK growth both within the information and communication sectors but also more broadly across other sectors of the economy. Support for the digital sectors to include robotics, Fintech, analytics and 3D printing is essential.
- The UK has been the leader in Europe in attracting FDI in knowledge industries such as pharmaceuticals, biotechnology and cleantech. Any negative impact on the UK's attractiveness of Brexit has to be compensated for by policy change to ensure the UK continues to have the opportunity to build on its strength in these sectors.

In an unpredictable and increasingly competitive global economy, guiding the UK towards more balanced growth will not be easy. Devolution is a clear step in the right direction but enabling the regions alone will not be sufficient. Other elements of national policy must be designed to complement the industrial and regional strategy. The key components of this policy will be:

- A **trade strategy** which links all the elements of UK trade in the context of the industrial strategy. The UK's post-Brexit trade deals must guarantee access to the right markets for the right products and enable imports to the UK.
- A commitment to **deliver infrastructure** that has to go beyond the welcome first steps in the Autumn Statement. A cross-country rail and road network fit for purpose in the North and Midlands are essential requirements. Broadband and mobile access also needs to be upgraded to ensure all parts of the country are connected so that people can participate fully in the economy.
- Investment in the **skills** required to build a successful modern economy that is competing on the world stage. Digital skills will be a key part of this but so will the communications and interpersonal skills that employers value so highly.
- The appropriate policy and incentive regime to allow the UK to reposition itself in existing markets and to create a platform for growth in new sectors. Incentives for investment in R&D, tax and business rate schemes that incentivise capital investment and competitive profit taxes are all necessary components of positioning for a successful economy post-Brexit.

Economics for Business

Our Economics for Business Programme provides knowledge, analysis and insight to help businesses understand the economic environments in which they operate.

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Economics for Business blog:
markgregoryeconomics.ey.com

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economics@uk.ey.com

Definitions

Newcastle	Newcastle upon Tyne LA
Liverpool	Liverpool LA
Manchester	Manchester LA
Kingston upon Hull	UA
Leeds	Leeds LA
Birmingham	Birmingham LA
Stoke-on-Trent	Stoke on Trent UA
Cambridge	Cambridge LA
Luton	Luton LA
Reading	Reading UA
Southampton	Southampton UA
South Coast	Bournemouth UA, Poole UA, Test Valley LA, Southampton UA, New Forest LA, Eastleigh LA, Winchester LA, Fareham LA, Gosport LA, East Hampshire LA, Havant LA, Portsmouth UA, Isle of Wight UA
Thames Valley	West Berkshire UA, Reading UA, Windsor and Maidenhead UA, Wokingham UA, Slough UA, Bracknell Forest UA, Basingstoke and Deane LA, Hart LA, Rushmoor LA, Cherwell LA, West Oxfordshire LA, Oxford LA, Vale of White Horse LA, South Oxfordshire LA
Bristol	Bristol LA
Exeter	Exeter LA
Belfast	Belfast LGD
Aberdeen	City of Aberdeen CA
Dundee	City of Dundee CA
Edinburgh	City of Edinburgh CA
Glasgow	City of Glasgow CA
Inverness	Highland CA*
Perth and Kinross	Perth and Kinross CA
Stirling	Stirling CA
Sheffield City Region Combined Authority	Barnsley LA, Bassetlaw LA, Bolsover LA, Chesterfield LA, Derbyshire Dales LA, Doncaster LA, North East Derbyshire LA, Rotherham LA, Sheffield LA
Portsmouth	Portsmouth UA
Oxford	Oxford LA
East Anglia Combined Authority	Babergh LA, Breckland LA, Broadland LA, East Cambridgeshire LA, Fenland LA, Forest Heath LA, Great Yarmouth LA, Huntingdonshire LA , Ipswich LA, King's Lynn and West Norfolk LA, Mid Suffolk LA, North Norfolk LA, Norwich LA, Peterborough LA, St Edmundsbury LA, South Cambridgeshire LA, South Norfolk LA, Suffolk Coastal, Waveney LA
Tees Valley Combined Authority	Middlesbrough UA, Hartlepool UA, Redcar and Cleveland UA, Stockton-on-Tees UA, Darlington UA
Liverpool City Region Combined Authority	Halton LA, Knowsley LA, Liverpool LA, Sefton LA, St Helens LA, Wirral LA
Cardiff	Cardiff LA
Milton Keynes	Milton Keynes UA
Swansea	Swansea LA
Sunderland	Sunderland LA
Cornwall	Cornwall UA
West Midlands Combined Authority	Birmingham LA, Coventry LA, Dudley LA, Sandwell LA, Solihull LA, Walsall LA, Wolverhampton LA
Greater Manchester	Manchester LA, Stockport LA, Tameside LA, Oldham LA, Rochdale LA, Bury LA, Bolton LA, Wigan LA, Salford LA, Trafford LA

UA = Unitary Authority
LA = Local Authority District
CA = Council Area
LGD = Local Government District

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