



East of England

Reviving Regions:
Empowering places to revive and thrive

- East of England growth priorities
- Regional scorecard identifying strengths
- 16 sub-regional scorecards



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Introduction

The UK has a productivity challenge. Productivity growth has stagnated since the financial crisis, with the knock-on impact of low wage growth and growing inequalities, which the CBI explored in **Reviving regions**, and have now expanded upon by publishing regional-specific scorecards and growth priorities.

Disparities between economic performance are large both across and within English regions. London remains the most productive part of the country in absolute terms, and many marginalised places are in the North of England. But the picture is not as clear cut as north vs. south, with most regions having areas that are doing well, and some that are underperforming.

The CBI has set out a series of recommendations to close productivity gaps and level up the country. The recommendations are underpinned by the idea that interventions must reflect local needs, and regions should be further empowered if we are to level up the country. This becomes increasingly important given the impacts of the pandemic could affect regions differently.

The report recommendations included:

- **Building vibrant local labour markets:** including increasing local capacity to deliver back to work programmes alongside a long-term focus on the devolution of adult skills to meet our growing skills gap.
- **Transforming local physical and digital infrastructure to facilitate new ways of working:** including a focus on the future of towns and cities, and a reform of regional funding to ensure a strategic approach to future investments.
- **Inspiring world-class, innovative businesses to invest in the regions:** including short term interventions to help businesses grow, locally designed and delivered business support with a focus on access to exporting opportunities, and interventions to close the gap in regional R&D funding.

The CBI has now developed a series of scorecards to support policymakers and business to understand the unique strengths of regions, and areas of focus for interventions. These provide a snapshot of the economic and social health of the nine regions of England, alongside a more detailed picture for sub-regions.

Based on this data, the recommendations set out above, as well as insights from local businesses the CBI has also developed growth priorities for each region, setting out what we hope to achieve working collaboratively with local and national stakeholders.

[Click here
to download
the report](#)



East of England growth priorities

Context

The East of England is ranked third out of nine English regions for productivity (GVA £ per hour), and benefits from proximity to London. It is ranked number one for R&D per head and has strong diversity of higher education. The region plans to expand upon existing offshore wind assets, hydrogen production and storage technologies. Recently two Freeports for Felixstowe and Harwich (Freeport East) and for the Thames have been announced strengthening the region's role as an international gateway.

Competitive strengths



Renewable energy



Life sciences



Agri-tech/
agriculture



Advanced manufacturing



Travel and tourism



Professional and financial services

Regional assets

- Stansted and Luton international airports
- Offshore Renewable Energy Catapult
- Cell & Gene Therapy Catapult
- Adastral Park
- Cambridge Biomedical Campus and a rich R&D ecosystem

The CBI has developed the following growth priorities

- **Build vibrant local labour markets** by addressing the skills gap, youth unemployment and futureproofing. With a focus on both transferable skills such as digital and management and those needed for clean growth and the green recovery, including for retrofitting and renewable energy generation. With the East increasingly looking to the opportunities presented by the race to net zero, for example hydrogen production, there is a need to ensure the provision of skills at all levels.
- **Transform local infrastructure to facilitate new ways of working** by developing and improving east to west connectivity. This should include road and rail schemes such as Ely Area Capacity Enhancement, A47 dualling and East West Rail combined with preventing digital exclusion in rural and coastal areas.
- **Inspire world-class innovative businesses to invest in the East** by encouraging research and development and promoting existing competitive strengths. Local Enterprise Partnerships and the Combined Authority should provide targeted support to facilitate growth and decarbonisation. The Oxford Cambridge Arc is vital, providing a significant opportunity for investment and growth. To be successful the development of the spatial framework must be collaborative and should provide a platform for linking the Arc with the rest of the East for example through the Cambridge Norwich Tech Corridor.

Next steps

The CBI, working alongside local and national leaders, is focused on the implementation of these priorities. To become involved, please contact

[Helena Coe](#).

About the scorecards

The scorecards below provide a snapshot of the economic health of regions. Each scorecard includes 20 indicators, focussed on a region's productivity and some of the factors that can influence it. The scorecards are designed to help businesses, central and local government identify priority areas for intervention to improve local economic outcomes.

Regions and sub-regions

Because there are differences within regions, as well as between them, we have developed two different types of scorecards – one for each of the nine large English regions (known as ITL1 regions), and one for each of 133 sub-regions (known as ITL3 regions).

This pack contains a scorecard for the East of England ITL1 region, followed by scorecards showing values for each of the 16 ITL3 sub-regions within it.

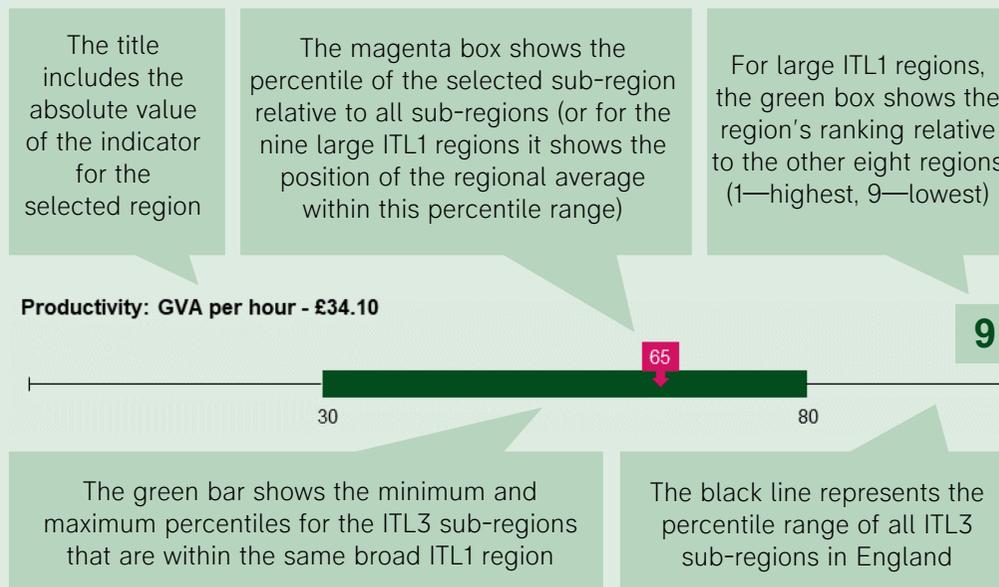
How to read the charts

All data in the charts are expressed as percentiles, which show how the value of an indicator for the selected area compares with the values of all English sub-regions. Taking productivity as an example, if a sub-region's productivity is at the 65th percentile, this means it is more productive than 65% of sub-regions.

The charts in the first scorecard show the range of outcomes within the East of England ITL1 region (the dark green bar), plotting the position of the average for the region within this range (the magenta box).

Rankings are also provided showing how the averages for the East of England ITL1 region compare with the averages of other large English regions.

The ITL1 scorecard is followed by scorecards showing values for each ITL3 sub-region within it, with the figure in the magenta box representing the percentile for the selected sub-region.

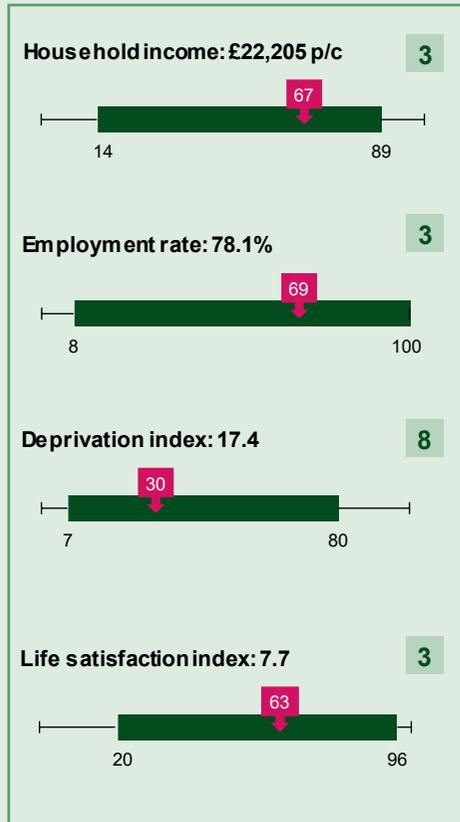


Is productivity converging or diverging?

To capture how productivity has changed over the decade to 2018 (latest available data), the scorecards assign each region to one of four groups:

-  Above average productivity and above average productivity growth. Regions have pulled further ahead, increasing their advantage.
-  Above average productivity but below average productivity growth. Regions are still doing well but have lost ground relative to the average.
-  Below average productivity but above average productivity growth. Regions have narrowed the gap to the average, but some still lag behind.
-  Below average productivity and below average productivity growth. Regions are falling further behind the average.

Economic & social outcomes^{1, 2}



Productivity drivers & barriers^{1, 2}

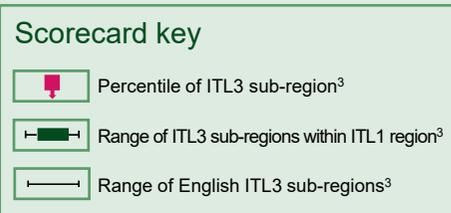
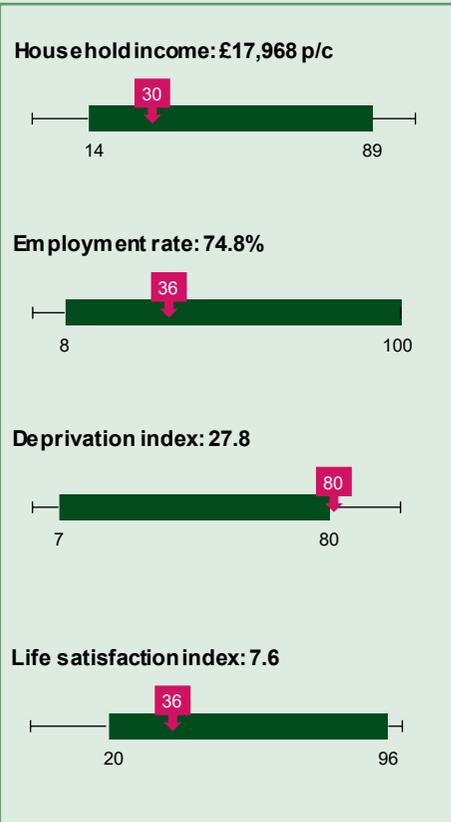


Scorecard key

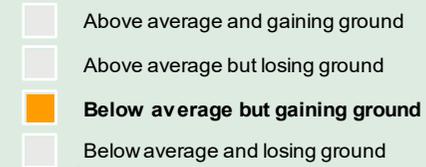
- Rank out of 9 regions, 1=highest value
- Percentile of average for ITL1 region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
 2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
 3) For R&D sub-regional data is for ITL2 level regions. For innovation activity all data is for ITL1 regions only.

Economic & social outcomes^{1,2}

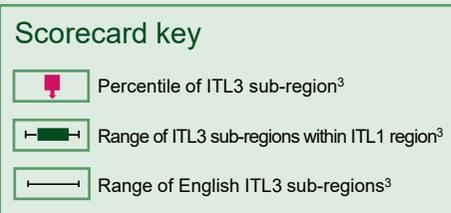
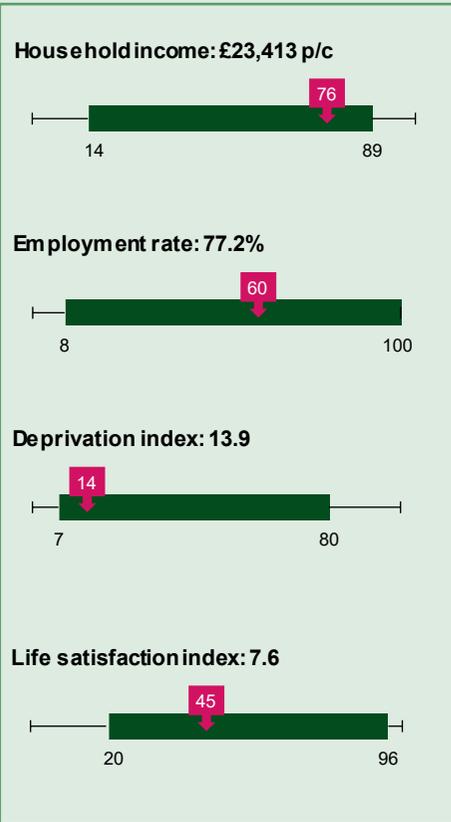


Productivity drivers & barriers^{1,2}



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Economic & social outcomes^{1, 2}



Productivity drivers & barriers^{1, 2}



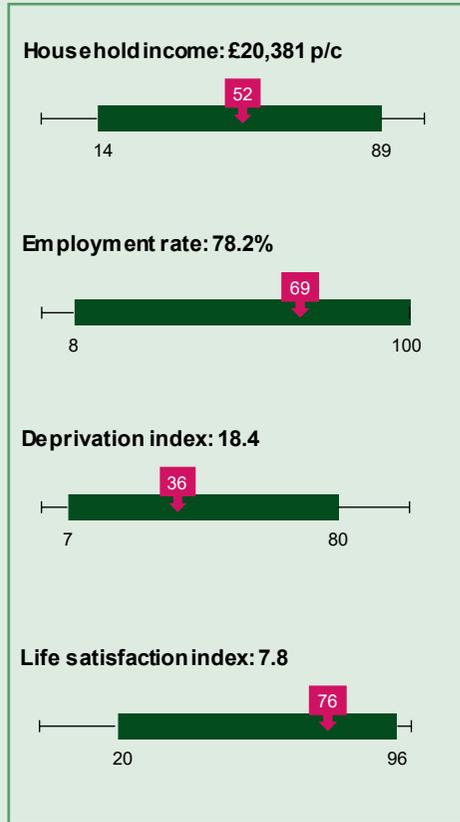
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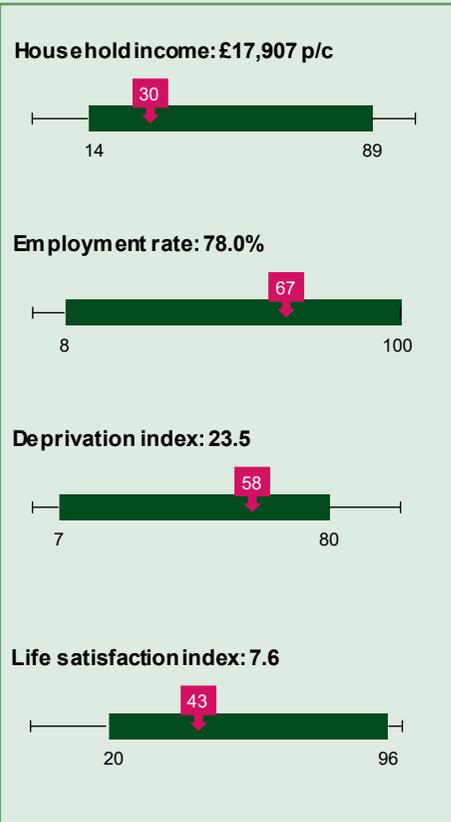
Economic & social outcomes^{1, 2}

Productivity drivers & barriers^{1, 2}



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Economic & social outcomes^{1, 2}



Scorecard key

- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

Productivity drivers & barriers^{1, 2}

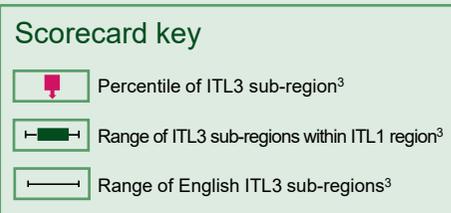
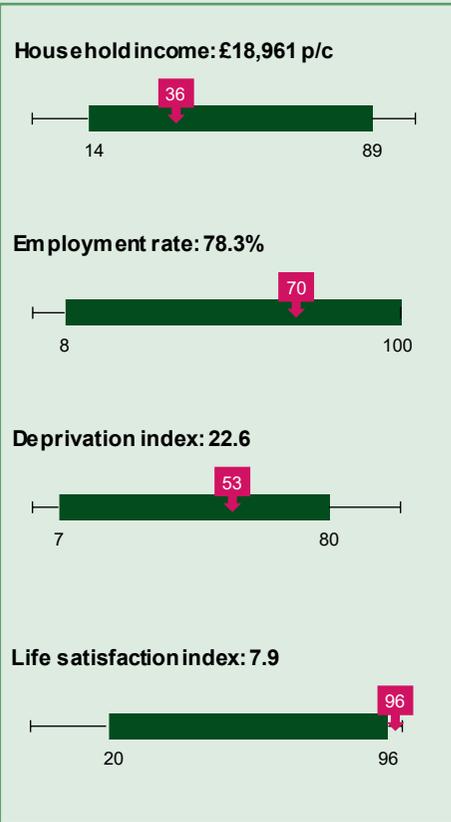


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Economic & social outcomes^{1,2}



Productivity drivers & barriers^{1,2}

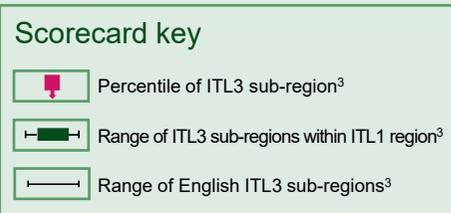
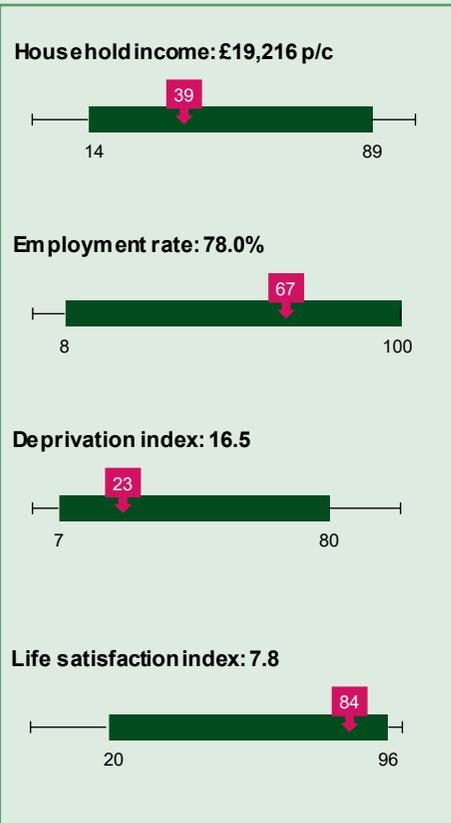


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Economic & social outcomes^{1,2}



Productivity drivers & barriers^{1,2}



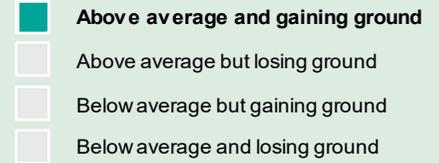
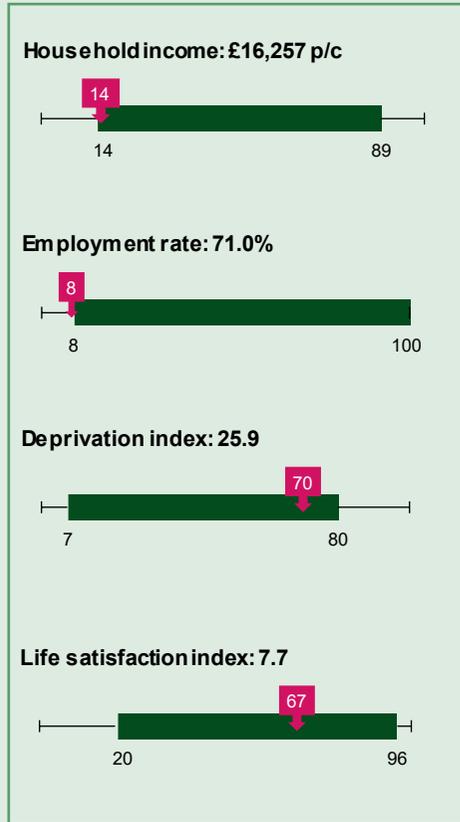
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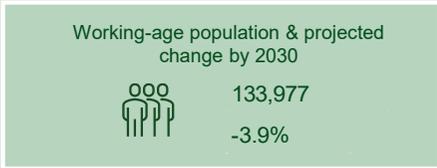
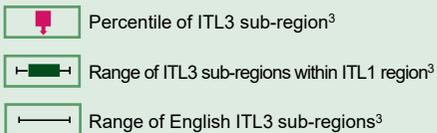
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Economic & social outcomes^{1, 2}

Productivity drivers & barriers^{1, 2}



Scorecard key



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Economic & social outcomes^{1,2}

Household income: £27,072 p/c



Employment rate: 79.5%



Deprivation index: 12.7



Life satisfaction index: 7.7



Scorecard key

- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

Productivity drivers & barriers^{1,2}

Productivity (GVA per hour): £34.96



Vibrant local labour markets

Schools above standard: 95.9%



Graduates in workforce: 44.2%



In-work training: 17.5%



Working-age population & projected change by 2030



739,879
0.2%

Well-connected, accessible places

Broadband speed: 68.2 m b/s



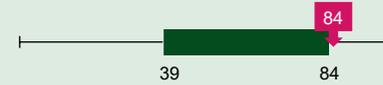
Commute time: 34.2 mins



Home working index: 3.4



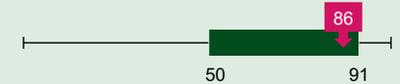
Median house prices: £400,000



- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

World-class, innovative businesses³

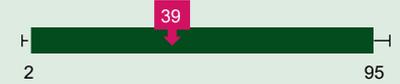
R&D per head (ITL2): £1,027



Innovation activity (ITL1): 38.6%



High growth firms: 4.0%



Exports intensity: 31.9% of GVA

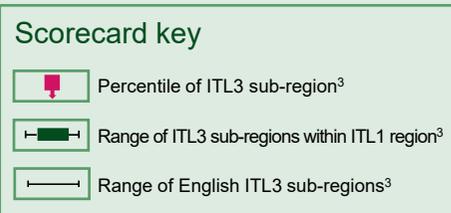
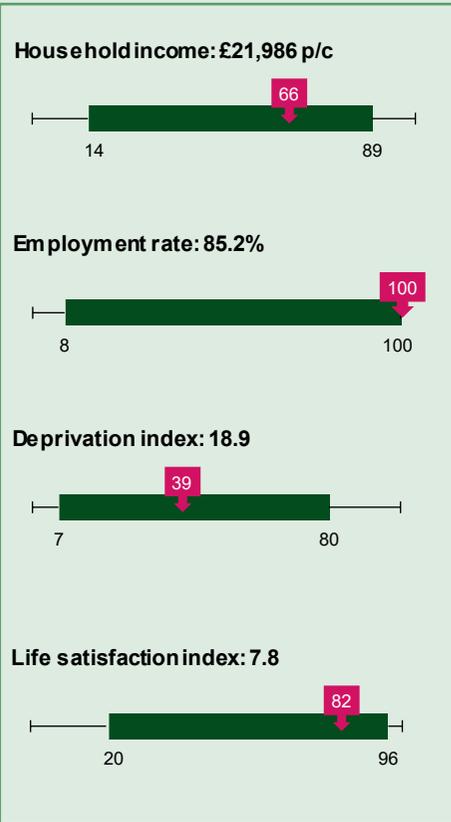


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Economic & social outcomes^{1, 2}

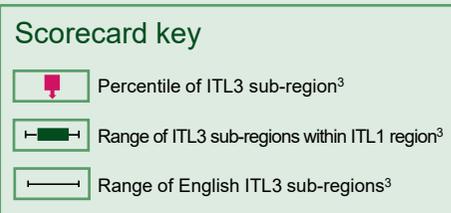
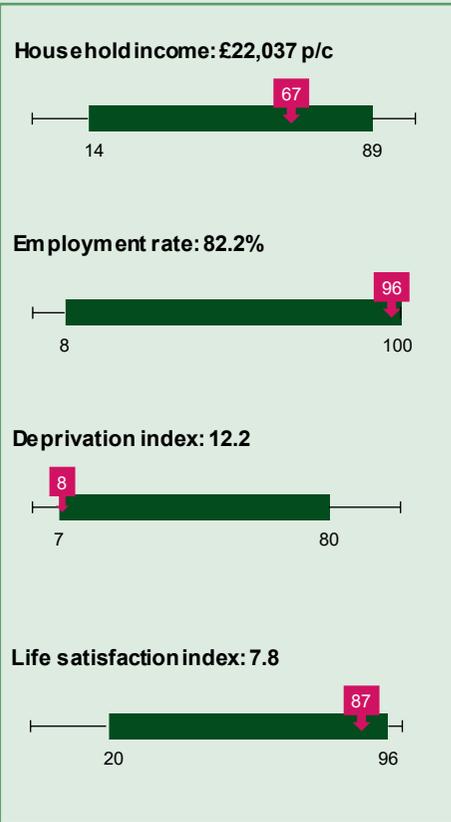


Productivity drivers & barriers^{1, 2}



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Economic & social outcomes^{1, 2}



Productivity drivers & barriers^{1, 2}



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Economic & social outcomes^{1,2}

Household income: £21,064 p/c



Employment rate: 79.1%



Deprivation index: 22.4



Life satisfaction index: 7.7



Scorecard key

- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

Productivity drivers & barriers^{1,2}

Productivity (GVA per hour): £25.45



Vibrant local labour markets

Schools above standard: 81.8%



Graduates in workforce: 31.3%



In-work training: 17.8%



Working-age population & projected change by 2030



111,594
5.3%

Well-connected, accessible places

Broadband speed: 54.8 m b/s



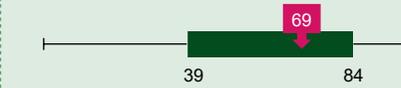
Commute time: 32.9 mins



Home working index: 3.3



Median house prices: £293,500



- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

World-class, innovative businesses³

R&D per head (ILT2): £405



Innovation activity (ITL1): 38.6%



High growth firms: 2.4%



Exports intensity: 12.3% of GVA



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Economic & social outcomes^{1, 2}

Household income: £18,976 p/c



Employment rate: 75.4%



Deprivation index: 20.9



Life satisfaction index: 7.6



Scorecard key

- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

Productivity drivers & barriers^{1, 2}

Productivity (GVA per hour): £34.18



Vibrant local labour markets

Schools above standard: 80.0%



Graduates in workforce: 28.6%



In-work training: 21.3%



Working-age population & projected change by 2030



109,614
10.6%

Well-connected, accessible places

Broadband speed: 57.9 m b/s



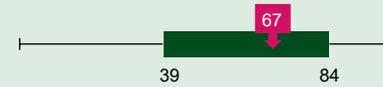
Commute time: 36.0 mins



Home working index: 3.1



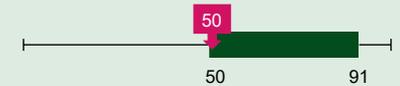
Median house prices: £290,000



- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

World-class, innovative businesses³

R&D per head (ILT2): £405



Innovation activity (ITL1): 38.6%



High growth firms: 3.8%



Exports intensity: 14.8% of GVA

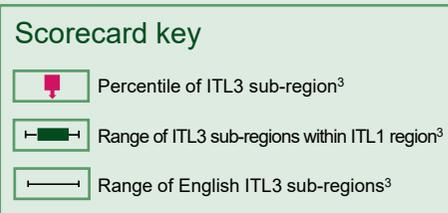
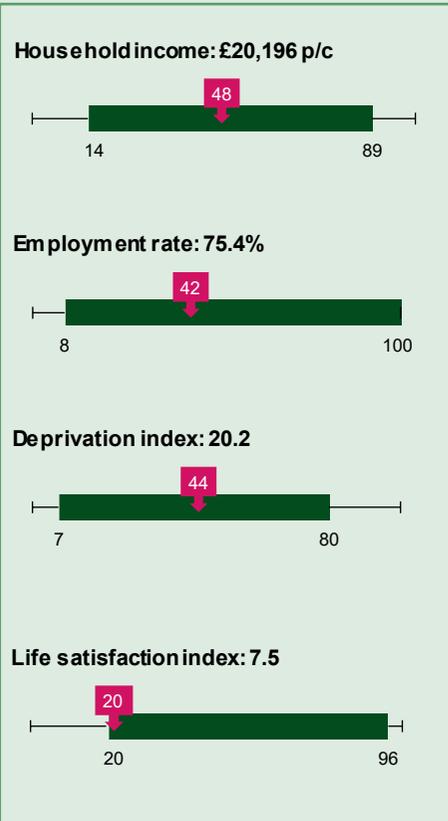


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Economic & social outcomes^{1, 2}



Productivity drivers & barriers^{1, 2}



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Economic & social outcomes^{1, 2}

Productivity drivers & barriers^{1, 2}

Household income: £26,039 p/c



Employment rate: 79.7%



Deprivation index: 15.1



Life satisfaction index: 7.7



Scorecard key

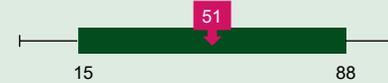
- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

Productivity (GVA per hour): £35.60



Vibrant local labour markets

Schools above standard: 89.0%



Graduates in workforce: 40.5%



In-work training: 18.7%



Working-age population & projected change by 2030

189,758
2.8%

Well-connected, accessible places

Broadband speed: 57.0 m b/s



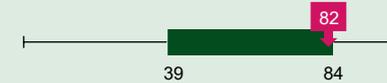
Commute time: 37.7 mins



Home working index: 3.4



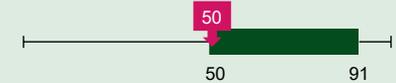
Median house prices: £385,000



- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

World-class, innovative businesses³

R&D per head (ILT2): £405



Innovation activity (ITL1): 38.6%



High growth firms: 5.9%



Exports intensity: 25.2% of GVA



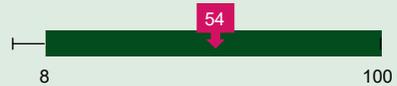
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Economic & social outcomes^{1,2}

Household income: £25,752 p/c



Employment rate: 76.5%



Deprivation index: 12.1



Life satisfaction index: 7.8



Scorecard key

- Percentile of ITL3 sub-region³
- Range of ITL3 sub-regions within ITL1 region³
- Range of English ITL3 sub-regions³

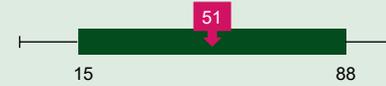
Productivity drivers & barriers^{1,2}

Productivity (GVA per hour): £34.57



Vibrant local labour markets

Schools above standard: 89.0%



Graduates in workforce: 35.2%



In-work training: 18.7%



Working-age population & projected change by 2030



194,732
2.9%

Well-connected, accessible places

Broadband speed: 45.5 m b/s



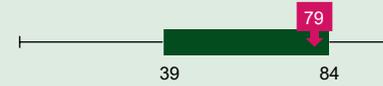
Commute time: 39.1 mins



Home working index: 3.4



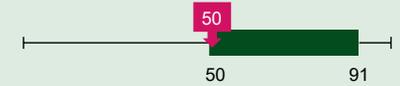
Median house prices: £362,500



- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

World-class, innovative businesses³

R&D per head (ILT2): £405



Innovation activity (ITL1): 38.6%



High growth firms: 3.8%



Exports intensity: 15.0% of GVA

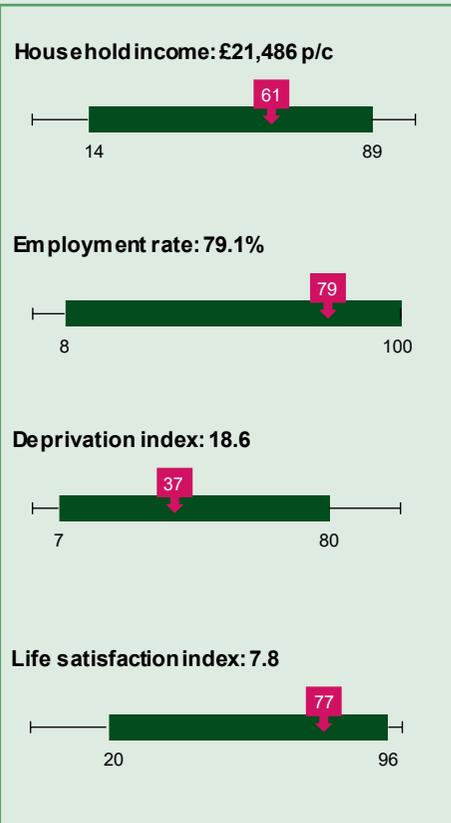


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Economic & social outcomes^{1,2}



Scorecard key

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- Range of English ITL3 sub-regions³

Productivity drivers & barriers^{1,2}



1) Indicators are plotted on a percentile scale of all ITL3 areas in England.

2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.

3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Notes and sources

Regions & classifications

Units of analysis

The geographic areas for much of our analysis are defined by the International Territorial Levels (ITLs), which were introduced in 2021 as a successor to the EU's Nomenclature of Units for Territorial Statistics (NUTS) classifications. There are two different types of scorecards:

- ITL1 regions: Nine major English regions, with an average population of 6.3m, ranging from a minimum of 2.7m (North East) to 9.2m (South East).
- ITL3 regions: 133 smaller regions with an average population of 423k, ranging from a minimum of 106k (Darlington) to a maximum of 1.2m (Hertfordshire).

In all but two cases the ITL3 and the old NUTS3 boundaries are aligned. The exceptions are "Bournemouth and Poole" and "Dorset CC", which under ITLs are classified as "Bournemouth, Christchurch and Poole", and "Dorset". Where possible we have created ITL data for these two sub-regions using Local Authority District (LAD) data.

Rural-urban classification

Region is defined as: Predominantly Rural if the rural population share is greater than or equal to 50%; Urban With Significant Rural if the rural population share is 26%-49%; Predominantly Urban if the rural population share is less than or equal to 25%. ONS 2011 Census data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Economic & social outcomes

Household income – £ per person

Gross disposable household income per capita. Current basic prices. ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Employment rate – %

Employment rate for 16-64 year-old residents. ONS data for October 2019 to September 2020. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Deprivation index

Index of Multiple Deprivation Average Score, where the larger the score, the more deprived the area. Ministry of Housing, Communities & Local Government data for 2019. Scores derived from LAD values, weighted by population. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Life satisfaction index

Average rating, ranging from 0 to 10, where 10 implies complete satisfaction. ONS data for 2019/20. Data derived from LAD values, weighted by population. Percentiles based on NUTS regions, mapped from LAD data.

Productivity

Productivity – GVA per hour worked, £

Gross value added per hour worked in £, nominal (smoothed). ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Productivity – convergence/divergence taxonomy

The level of productivity is defined by gross value added per hour in £, nominal (smoothed). ONS 2018 data. Productivity growth is annual average % change in real value added per hour over 2009-18. NUTS regions. The methodology is based on an approach used in "UK Regional Productivity Differences: An Evidence Review", Industry Strategy Council.

Notes and sources

Vibrant Local Labour Markets

Schools above standard – %

Percentage of schools categorised as above floor standard. Department for Education 2017/18 data. Values derived from Local Education Authority (LEA) data. Where the LEA encompasses more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Graduates in workforce – %

Percentage of 16-64 year-old population with NVQ4+. ONS data for 2019. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

In-work training – %

Percentage of firms offering management training. Data from Department for Education, Employers Skills Survey 2019. Values derived from LEA data. Where the LEA corresponds to more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Working-age population

Number of people aged 16-64. ONS data for 2019. Projected % change, 2019-2030. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Well-Connected Places

Broadband Speed – mb/s

Median download speed in megabits per second. Ofcom data for 2020. Values are derived from LAD data, weighted by population. Percentiles are based on ITL regions, mapped from LAD data.

Commute times – minutes

Usual home to work travel time in minutes. Figures provided by ONS. 2019 data. Percentiles based on NUTS regions.

Home working index

CBI index of ability to home work, with scores ranging from 0 to 5, where 5 implies the ability for all tasks to be carried out remotely. Calculated from ONS “Which jobs can be done from home?” (derived from US Labor Department) and ONS Annual Population Survey on occupational employment by NUTS3, 2018 data. Percentiles based on NUTS regions.

Median house prices – £

Median price paid (all house types). ONS data for year ending September 2020. Percentiles based on NUTS regions.

World-class, innovative businesses

R&D per head – £

Gross domestic R&D expenditure (GERD), £ per inhabitant. Eurostat data for 2018. Data are only available at NUTS1 and NUTS2 levels, therefore each NUTS3 sub-region takes the value of the larger NUTS2 region of which it is a part. Percentiles are based on NUTS2 regions.

Innovation activity – %

Percentage of businesses that are classified as innovation active. Data from BEIS, UK Innovation Survey for 2016-18. Data are only available at NUTS1 level, therefore each NUTS3 sub-region takes the value of the larger NUTS1 region of which it is a part. Percentiles also based on NUTS1 regions.

High Growth Firms – %

Percentage of businesses that are classified as “high growth”. ONS data for 2019. Percentiles are based on ITL regions, mapped from LAD data.

Exporting intensity – % of GVA

Exports of goods and services as a % of gross value added. Data derived from HMRC and ONS. Percentiles based on NUTS regions.