



*Networking the North  
Past, Present & Future*

**Dr Malcolm Cooper**  
**Head of Research**  
**Centre for Cities**



## The Past

# A Global Industrial Economy



## The Lancashire Cotton Industry, 1913

**Cotton exports peak at over 7,000 million yards – 65% of total global output**

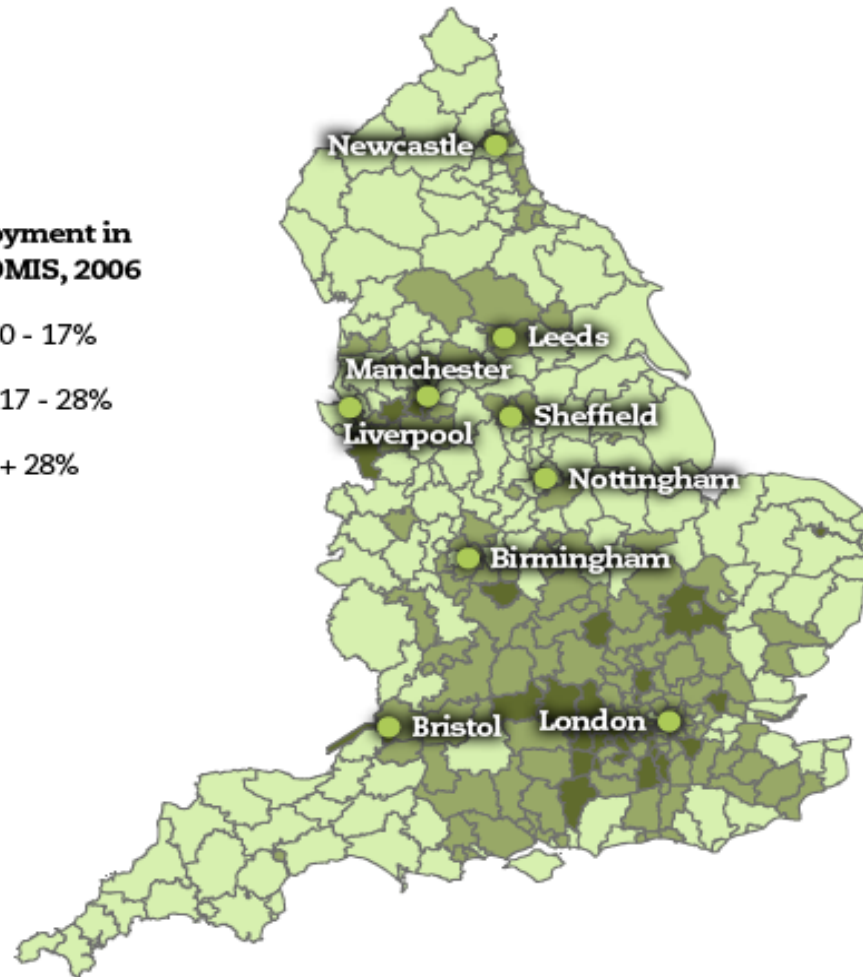
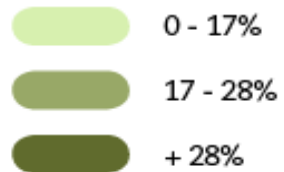


## The Present

### **A Global Services Economy?**



**% of employment in  
finance NOMIS, 2006**

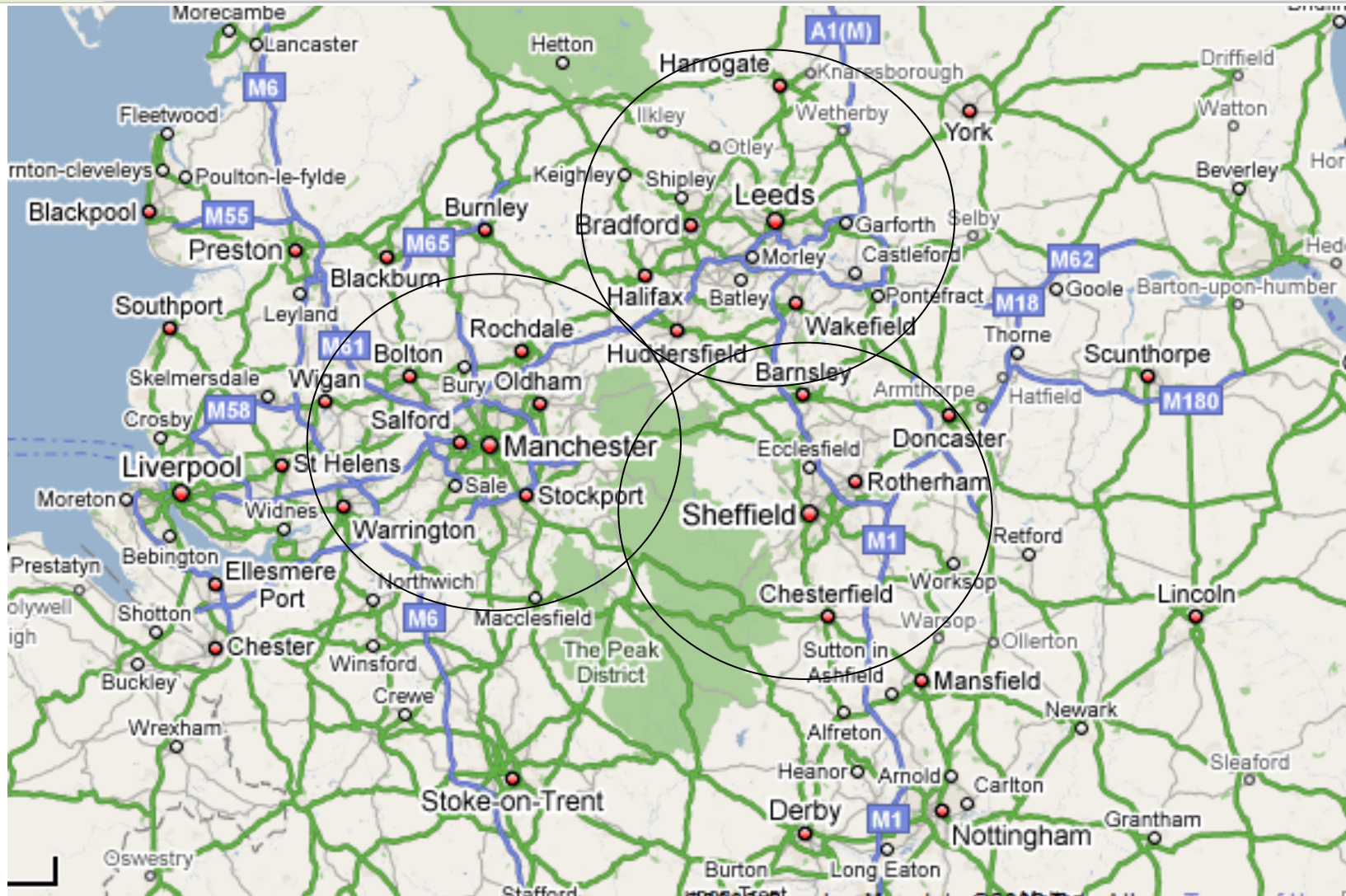


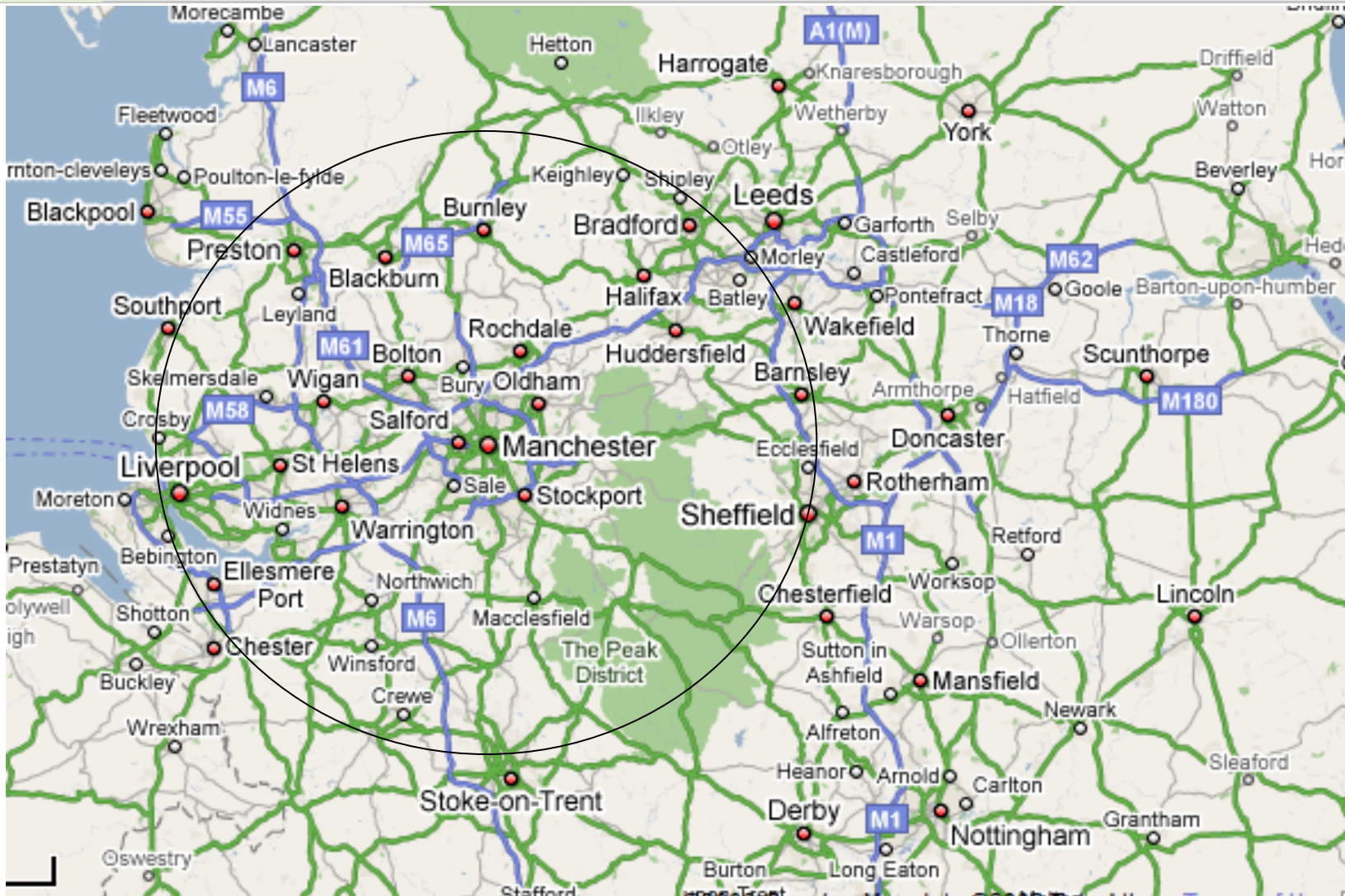
Source: Annual Business Inquiry.

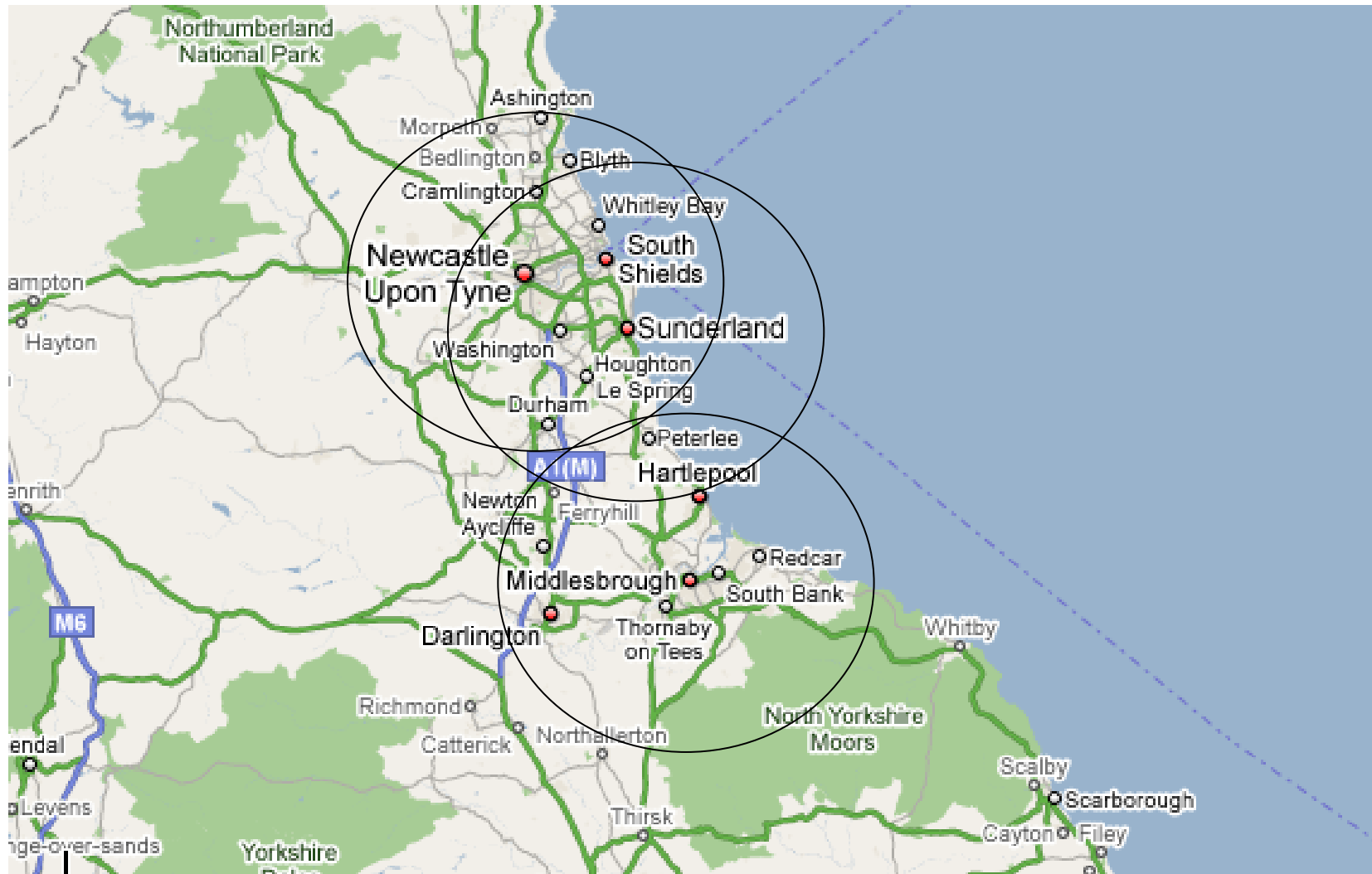


## Geography & Infrastructure

# Shrinking Distance to Accelerate Growth







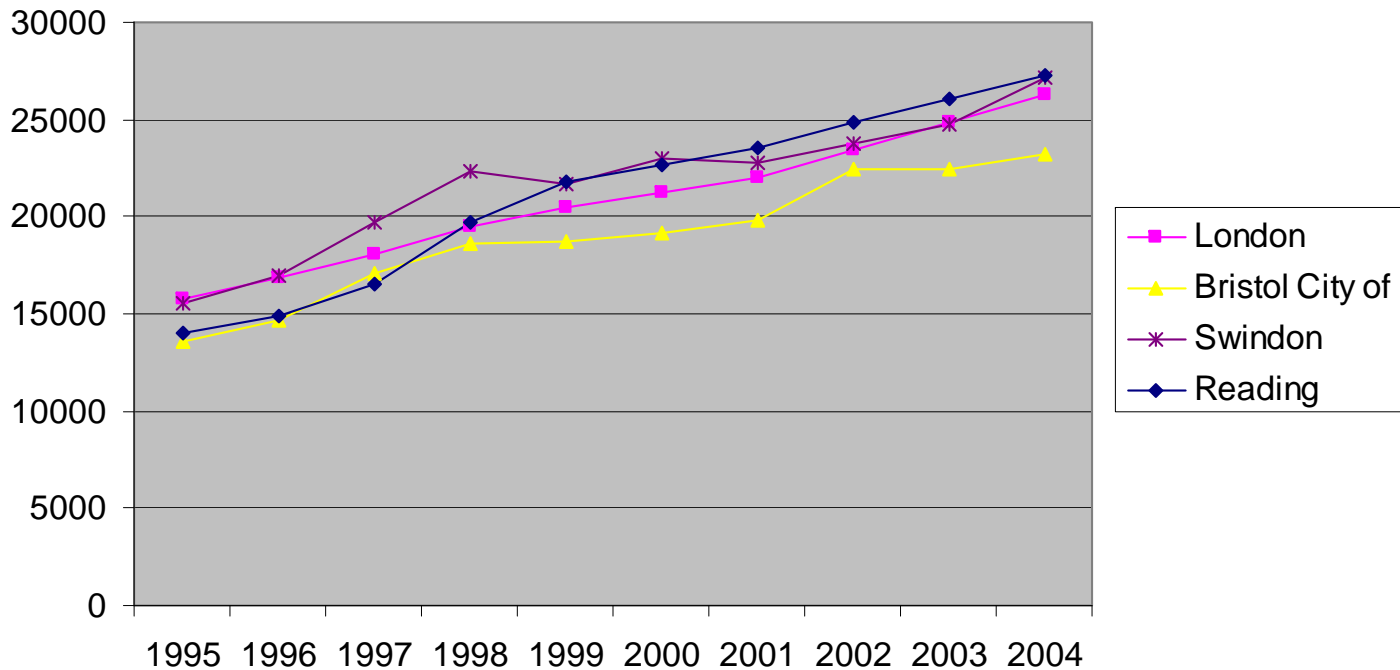


## A Northern Tube?

- **Central Line** 46 miles  
Manchester/Blackpool 52 miles
- **District Line** 40 miles  
Manchester/Sheffield 41 miles
- **Jubilee Line** 23 miles  
Manchester/Wigan 21 miles
- **Metropolitan Line** 42 miles  
Manchester/Leeds 42 miles
- **Northern Line** 36 miles  
Manchester/Bradford 36 miles

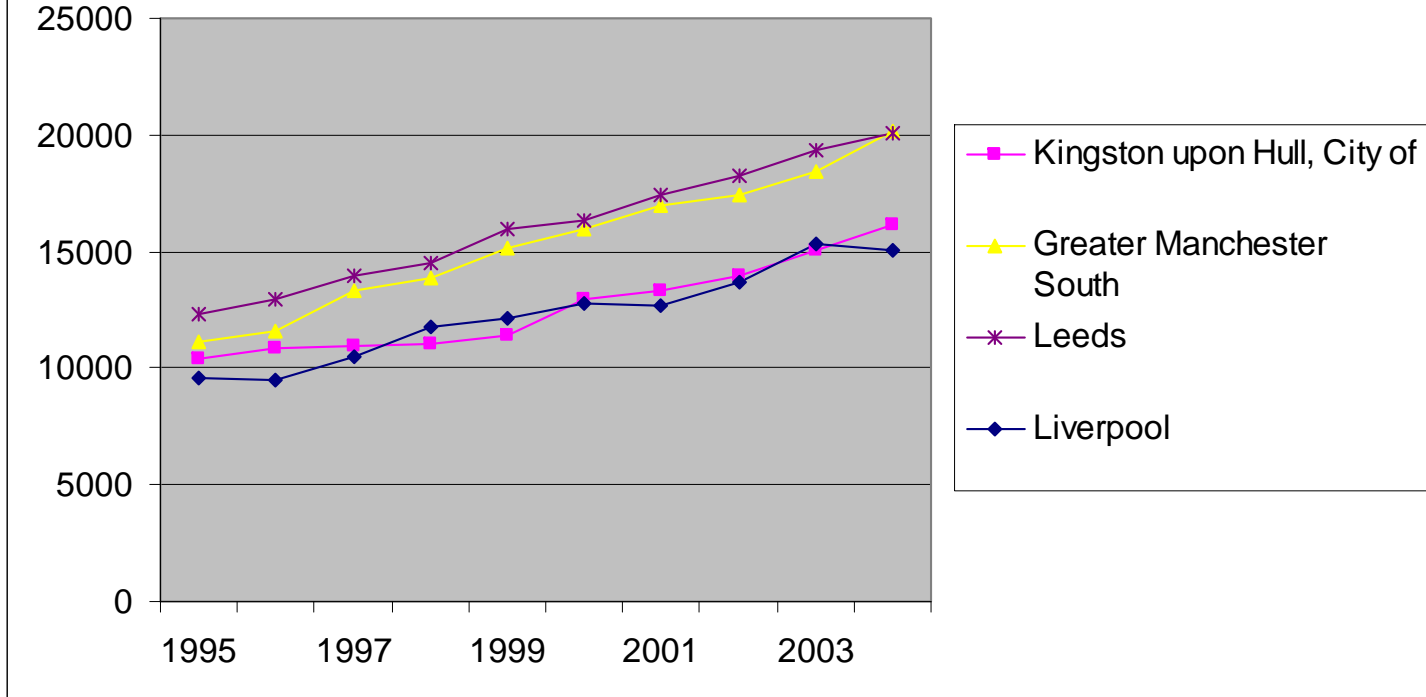


### M 4 Corridor - GVA per capita (£), 1995-2004





### M 62 Corridor - GVA per capita (£), 1995-2004





## Productive Capital

### City Specialization and Clustering



<b>Cities</b>	<b>High Tech</b>	<b>Cities</b>	<b>Knowledge-Intensive Business Sectors (KIBS) (Wide def)</b>
<b>Top 15</b>	<b>2005 Emp %</b>	<b>Top 15</b>	<b>2005 Emp %</b>
<b>Derby (EM)</b>	<b>11.7</b>	<b>Cambridge (E)</b>	<b>36.0</b>
<b>Aldershot (SE)</b>	<b>8.4</b>	<b>Oxford(SE)</b>	<b>28.2</b>
<b>Blackpool (NW)</b>	<b>7.5</b>	<b>Southampton(SE)</b>	<b>27.3</b>
<b>Portsmouth (SE)</b>	<b>6.1</b>	<b>Milton Keynes(SE)</b>	<b>27.1</b>
<b>Swindon (SW)</b>	<b>6.1</b>	<b>Reading(SE)</b>	<b>26.6</b>
<b>Cambridge (E)</b>	<b>5.8</b>	<b>London (LON)</b>	<b>26.4</b>
<b>Burnley (NW)</b>	<b>5.7</b>	<b>Norwich (E)</b>	<b>24.8</b>
<b>Hastings (SE)</b>	<b>5.7</b>	<b>Brighton(SE)</b>	<b>23.9</b>
<b>Worthing (SE)</b>	<b>5.5</b>	<b>Bristol (SW)</b>	<b>23.8</b>
<b>Bristol (SW)</b>	<b>4.9</b>	<b>Aldershot (SE)</b>	<b>23.7</b>
<b>Reading (SE)</b>	<b>4.4</b>	<b>Leeds (Y&amp;H)</b>	<b>22.8</b>
<b>Crawley (SE)</b>	<b>4.4</b>	<b>Bournemouth (SW)</b>	<b>21.9</b>
<b>Luton (E)</b>	<b>4.4</b>	<b>Worthing (SE)</b>	<b>21.2</b>
<b>Telford (WM)</b>	<b>4.3</b>	<b>York (Y&amp;H)</b>	<b>20.1</b>
<b>Preston (NW)</b>	<b>4.0</b>	<b>Northampton (EM)</b>	<b>19.9</b>

Source: State of the English Cities Database



<b>Sheffield – Sector Specialization</b>	<b>Location Quotient</b>
<b>Manufacture of basic Iron and Steel and of Ferro-Alloys</b>	<b>18.6</b>
<b>Manufacture of Tools</b>	<b>12.0</b>
<b>Call Centre Activities</b>	<b>9.2</b>
<b>Forging, Pressing, Stamping, and Roll Forming of Metal; Powder Metallurgy</b>	<b>4.4</b>



<b>Sunderland Sector Specialization</b>	<b>Location Quotient</b>
<b>Manufacture of Motor Vehicles</b>	<b>11.3</b>
<b>Call Centre Activities</b>	<b>10.2</b>
<b>Manufacture of Parts and Accessories for Motor Vehicles and their Engines</b>	<b>8.0</b>
<b>Data Base Activities</b>	<b>7.5</b>



<b>Middlesbrough Sector Specialization</b>	<b>Location Quotient</b>
<b>Manufacture of other organic Chemicals</b>	<b>23.2</b>
<b>Manufacture of basic Iron and Steel and of Ferro-Alloys</b>	<b>17.6</b>
<b>Processing and Preserving of Potatoes</b>	<b>13.6</b>
<b>Processing of Tea and Coffee</b>	<b>12.4</b>



## Intellectual Capital

### **Building the Knowledge Economy**



## **UK Higher Education – A Global Asset**

- **The UK has 1% of world population but contributes 5% of world scientific research**
- **20% of HEI academic staff come from outside the UK**
- **HEIs contribute £45 billion annually to the UK economy**
- **£5.5 billion annual contribution from international students**



## Gold Standard Centres of Excellence

- **Manchester** – Accounting & Finance; Metallurgy & Materials; Music; Theology, Divinity & Religious Studies
- **Leeds** – Food Science & Technology; Italian; Mechanical, Aeronautical & Manufacturing Engineering; Town & County Planning
- **Sheffield** – Electrical & Electronic Engineering; Library & Information; Metallurgy & Materials



<b>Accepted University Applicants</b>	<b>2007</b>
<b>North East</b>	<b>19,239</b>
<b>North West</b>	<b>37,907</b>
<b>Yorks &amp; Humber</b>	<b>44,755</b>
<b>Merseyside</b>	<b>12,724</b>
	<b>114,625</b>
<b>Eastern</b>	<b>20,247</b>
<b>Greater London</b>	<b>63,461</b>
<b>South East</b>	<b>48,359</b>
	<b>132,067</b>



## The Future

## Going Global



## London's Central Activity Zone

- **1.5 million jobs**: 33% of London employment in 2% of total land space
- **Workforce**: 640,000 from inner London, 480,000 from outer London & 380,000 from outside London
- **Annual financial services exports = £7.8 billion**
- **Annual business services exports = £7.7 billion**



## The Global Competitive Challenge for the North

- **Scale** of Business Base
- **Specialization** of Activity
- **Skills** of Workforce
- **Service** Products
- **Single** Internal Market
- **Synchronized** Economic Governance



## Questions / Comments ?

[m.cooper@centreforcities.org](mailto:m.cooper@centreforcities.org)

[www.centreforcities.org](http://www.centreforcities.org)

+44 20 7803 4305

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