

Institute for Public Policy Research



# **TRANSPORT INVESTMENT IN THE NORTHERN POWERHOUSE**

**2019 UPDATE**

**Luke Raikes**

August 2019

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# SUMMARY

Transport investment is crucial for the north of England. Every region needs a reliable and effective transport network for people to live and work, but the North – with its five major cities, 265 towns, almost 1,000 villages and smaller communities, eight major ports and four national parks – needs it more than most. This transport network has let down the North's people and its economy for decades, and especially in recent years. One of the major reasons this happens is that politicians and civil servants who are based in London fail to invest in the North's infrastructure.

Every year IPPR North undertakes two analyses of transport spending: **historic spending**, and **planned spending**. Every year this shows that central government has spent significantly more on transport in London historically, and still plans to do so in future.

This year, our analysis of **historic** spending shows that:

- Over the last 10 years (2008/09–2017/18), the average annual public spending on transport has been £739 per capita on London, compared to £305 per capita on the North – this means that for the last 10 years London has received 2.4 times more public spending on transport than the North.
- This gap has grown over the last 10 years – spending per capita on London has increased by 2.5 times more than it has in the North since 2007/08.

We also analyse **planned** spending and compare this to the government's own analysis. This analysis does not account for the recent news that Crossrail and HS2 may overspend. It also doesn't include Northern Powerhouse Rail because, despite recent promises, this isn't yet in the infrastructure pipeline.

The government's own analysis appears to show that the North West is set to receive the most transport investment per capita. But the government excludes almost two-thirds of spending in the pipeline. They make two assumptions which we believe to be mistaken, and which lead to the government significantly under-representing the level of transport investment in London.

1. **Excluding spending beyond 2021.** The government argues we should only analyse spending within the current spending review period. However, the point of the pipeline is to set out a long-term plan; and this approach becomes more meaningless with each year because fewer and fewer years of data are included as we approach the end of a spending review period.
2. **Excluding local spending in London.** The government argues that Transport for London's (TfL) spending isn't funded directly by the Department for Transport (DfT). However, this is because London has a special business rates deal, which means they keep the business rates they raise, instead of receiving a grant from central government. This deal not only means central government effectively still funds TfL, but the arrangement actually gives London an additional spending boost.

IPPR North's more comprehensive analysis includes spending beyond 2021 and local spending in London – for which central government is still responsible. IPPR North's analysis of **planned** transport investment finds that:

- £3,636 per capita is planned on London, compared to just £1,247 per capita on the North
- planned transport investment on London is therefore 2.9 times higher per capita than on the North
- planned transport spending on London is 7.0 times more per capita than on the North East (£519) and 7.1 times more per capita than on Yorkshire and the Humber (£511 per capita). The North West is set to receive more than the England regional average, at £2,062 per capita, but this is still far less than London.

This is a crucial time and the upcoming spending review presents an opportunity for the government to demonstrate their commitment to the Northern Powerhouse. We therefore recommend that the government should do the following.

1. **Deliver on promises to invest in the full Northern Powerhouse Rail project and other projects in the North** – not just the Manchester-Leeds section of the project.
2. **Build HS2 Phase 2 in the North first** – so that the intra-North connectivity can be established before the project is complete, and so that Northern Powerhouse Rail can be accelerated using its infrastructure.
3. **Invest in 'quick wins' in the North as well as the long-term infrastructure projects** – there are many transport projects which can make a difference in the North and can be delivered relatively soon.
4. **Devolve a £400 million project development budget to the North** – so that Transport for the North and the transport authorities within the North can bring forward projects for investment.
5. **Devolve transport powers and fair funding** to the North's local transport authorities and Transport for the North as appropriate – so that the North can take responsibility for its own infrastructure.

# 1. INTRODUCTION

Transport is vital to any region's economy, and it is particularly important for the north of England. The right transport interventions can enable significant economic, social and environmental benefits (Laird and Mackie 2010; Frontier Economics 2016). This is especially needed in the North – where cities, towns and economic assets are distributed across its diverse geography but are poorly connected with one another (TFN 2019). Transport isn't the only thing holding the North back – IPPR North has highlighted the importance of education and skills, health, trade and investment and business support (Raikes et al 2018). And it is also fair to say that evaluations of individual transport projects have shown mixed results (WWCLEG 2015). But transport remains an important catalyst for economic growth and prosperity.

Research has consistently shown how much more the government invests in London compared to the North. Previous IPPR North analyses have found a severe inequality in **historic** spending, and a severe inequality in **planned** future spending. Last year's analysis found that London had received more than twice as much transport investment per person as the North **historically**; and our analysis of **planned** transport infrastructure spending in the 2017 pipeline showed that 2.6 times more per person was planned in London than in the North (Raikes 2018).

There are several reasons for this.

- 1. Institutional capacity.** In the UK, major transport projects need to be actively developed and brought forward for central government investment. This is a function performed very effectively by TfL and Transport Scotland. Elsewhere there are only much smaller, under-resourced and far less powerful transport authorities that cover city regions (such as Transport for Greater Manchester (TfGM) and Merseytravel). This is one of the reasons why historically there haven't been many projects in England outside London in the pipeline. The vital regional tier has only recently evolved into something of substance in the form of Transport for the North, which has already demonstrated its value by setting out a £70 billion pipeline of investment.
- 2. Transport appraisal methodologies.** Decisions about whether to invest in a particular transport project are based, in part, on value-for-money assessments. These value-for-money assessments are underpinned by benefit-cost ratios (BCRs) which have historically valued journey-time savings of high-income individuals or land value increases – which means London's projects tend to be favoured (Metro Dynamics 2018). However, the importance of appraisal methodologies can be overstated – spending decisions are ultimately political decisions, which are informed by these methodologies. Nonetheless, there has been some minor improvement in this situation – the government has produced a 'rebalancing toolkit', which aims to improve this regional spending disparities by providing supplementary guidance.
- 3. Political pressure and influence.** Decisions to invest in transport projects are ultimately political. The influences on political decisions are by their nature difficult to pinpoint. But this effect can be observed, to an extent, by looking at projects which have been developed to the point of decision making, and demonstrate good value-for-money, but – for some unknown reason – don't receive the assent of government ministers (Coyle and Sensier 2018; Forth

2017). Because we have centralised governance and political institutions, political decisions privilege the centre and therefore the capital (Martin and Gardiner 2018). However, new mayors have now been elected to govern city regions across the country and have demonstrated the capability to exercise political influence on central government – particularly in the North.

(Raikes 2019)

It should be clear from the above that this picture is slowly starting to improve, and these changes should be welcomed. However, it remains to be seen whether the new government’s commitments to Northern Powerhouse Rail will indeed be followed through, and until that point the true impact of all these changes will be unclear.

## 2. HISTORIC SPENDING

In order to analyse historic transport spending we use statistics published by the ONS, which are based on the Treasury's spending records (ONS 2019). These figures only include public spending (ie not private spending leveraged in by public spending). But they include both revenue and capital spending and spending from central and local government. The *planned* spending figures that IPPR North have previously published are sometimes challenged by central government ministers<sup>1</sup> (this is discussed in section 3 of this report); but our analysis of these *historic* figures has yet to be directly challenged by government ministers (as far as we are aware).

IPPR North's analysis of historic spending figures shows that:

**London has received on average more than twice as much public transport spending per capita than the North or the UK over the last 10 years (2008/09–2017/18).**

- London received £739 per capita each year.
- The North received £305 per capita each year.
- The UK as a whole received £368 per capita each year.
- London has therefore received 2.4 times more public spending per capita on transport than the North, and two times more public spending on transport than on the UK as a whole, on average, each year for the past 10 years.<sup>2</sup>

**The gap between per capita transport spending in London and per capita spending in the North has increased in the last 10 years.**

- Spending on London has increased by £409 per capita since 2007/08.
- Spending on the North increased by £162 per capita since 2007/08.
- Spending on the UK increased by £157 per capita since 2007/08.
- Spending on London has therefore increased by 2.5 times more per capita than on the North and 2.6 times more per capita than the UK as a whole.

If the North had received the same amount per person as London over the last 10 years, then £66 billion more would have been spent in the North.

(IPPR North analysis of ONS 2019)

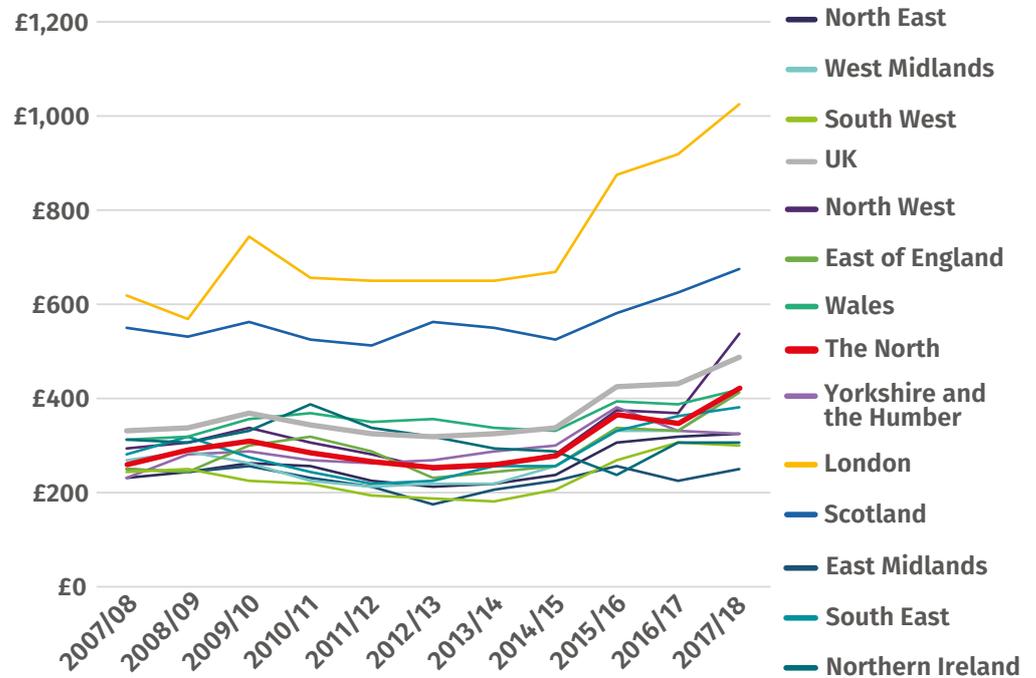
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1 See for example: <https://www.theyworkforyou.com/debates/?id=2018-12-11a.132.9>

2 Per capita figures are derived using average population for the years 2018–2033 (the length of the pipeline) – to account for population change (ONS 2018).

**FIGURE 2.1: TRANSPORT SPENDING PER CAPITA HAS BEEN MORE THAN TWICE AS HIGH ON LONDON AS ON THE NORTH OVER THE LAST DECADE**

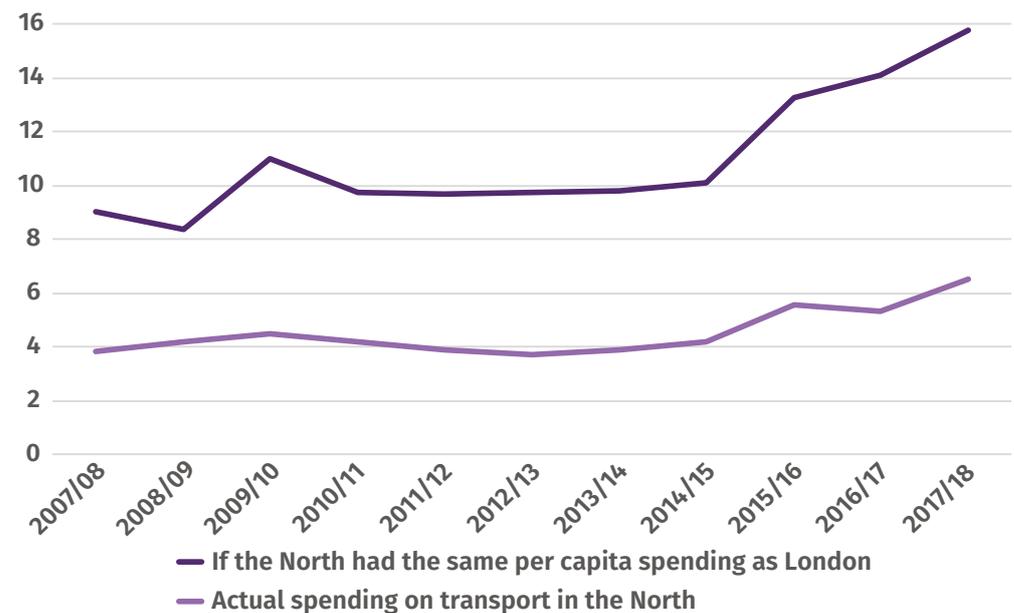
Total public spending on transport per capita – including revenue and capital, and from central and local government (private spending not included)



Source: IPPR North analysis of ONS 2019

**FIGURE 2.2: IF THE NORTH HAD THE SAME PER CAPITA SPENDING AS LONDON OVER THE LAST 10 YEARS, £66 BILLION MORE WOULD HAVE BEEN SPENT IN THE REGION**

Total public spending on northern transport, and total public spending on transport at London's per capita levels (£bn)



Source: IPPR North analysis of ONS 2019

## 3.

# PLANNED SPENDING

The government also publishes data on its **planned** spending on transport infrastructure. This includes only capital spending (as revenue is not forecast). Each year the government publishes the National Infrastructure and Construction Pipeline, which is produced by the Infrastructure and Projects Authority – the government’s centre of expertise for infrastructure and major projects – reporting to the Cabinet Office and HM Treasury.

The 2017 pipeline introduced a new government analysis of planned per capita spending (HM Treasury and IPA 2017). This shows that government acknowledges that per capita spending is a meaningful analysis – something which they had previously challenged. However, the methodology underpinning this is different from the one used by IPPR.

This section first sets out the government’s approach and results for the 2018 pipeline – which we believe to be incomplete – before presenting our own analysis and results, which are more comprehensive.

### 3.1. THE GOVERNMENT’S OWN ANALYSIS OF PLANNED SPENDING

The government’s own analysis appears to show that the North West is the region with the highest per capita spending (see figure 3.1).<sup>3</sup>

They make two major assumptions that lead to this conclusion and, for the reasons set out below, we disagree with these assumptions. An in-depth discussion of the methodologies is provided in last year’s publication and summarised below.<sup>4</sup>

#### **Assumption 1: Government analysis only includes spending up to the financial year 2020/21.**

- This excludes £42.8 billion of spending, of which almost half (£20.3 billion) is in London.<sup>5</sup>
- Government says we should only analyse projects within the spending review period, which ends in 2020/21.
- IPPR North believes this to be flawed because the purpose of this pipeline is to set out the government’s long-term investment plans – but 2021 is only two years away.

#### **Assumption 2: Government analysis excludes all local spending in London.**

- This excludes £9.9 billion in London from consideration.<sup>6</sup>
- The government argues that this is not *technically* funded directly by the DfT so it should be excluded.
- IPPR North believes this is flawed because central government is responsible for transport funding in London. London used to receive a grant from central

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3 From this point onward all figures refer to spending in England only – the £1.7 billion planned in Scotland and Wales is excluded.

4 See Raikes 2018

5 This includes local spending and therefore overlaps with assumption 2 below.

6 This includes spending beyond 2021 and therefore overlaps with assumption 1 above.

government, but swapped this for a deal with central government whereby they keep business rates raised in the capital – which would otherwise be redistributed across the country as they are for other regions. While London isn't the only place to have such an arrangement, the capital benefits far more than any other area – estimated at £431 million (Amin-Smith et al 2018). London also benefits from the unique powers granted to TfL, and denied elsewhere in the country, which allow it to raise revenue and invest in infrastructure.<sup>7</sup>

These two assumptions together mean that:

- the government analysis includes only £40.2 billion of the £117.6 billion total<sup>8</sup> transport investment in the pipeline – thereby including only 34.2 per cent and excluding 65.8 per cent of planned transport spending from their analysis
- £29.6 billion of the £50.9 billion that the government excludes is in London – almost one-third (42.3 per cent) of excluded spending
- of the £34.5 billion of spending in London that IPPR North include in our analysis (below), the government includes only £4.9 billion (14.2 per cent).<sup>9</sup>

However, it is important to note the improvements that have been made to the quality of the data again this year. In addition to the improvements made in the 2017 publication (such as breaking out the combination of central, local and private sources of spending), this year's edition also breaks down nation-wide programmes by region and year – including for HS2, which we recommended. But this is only done up to the year 2021, which – as with last year's pipeline – leaves a category of spending which cannot be attributed to regions: national programmes and projects with spending beyond 2021 – this notably includes a large amount of spending on HS2. We also continue to have some concerns about the methodology used to make some estimates of national schemes – which are sometimes done on a 'flat' or per capita basis because of data availability. It may be that more information is unavailable because the decisions may not have been made but, if possible, we would like to see this data improved.

This incomplete analysis of the figures is presented in figure 3.1.

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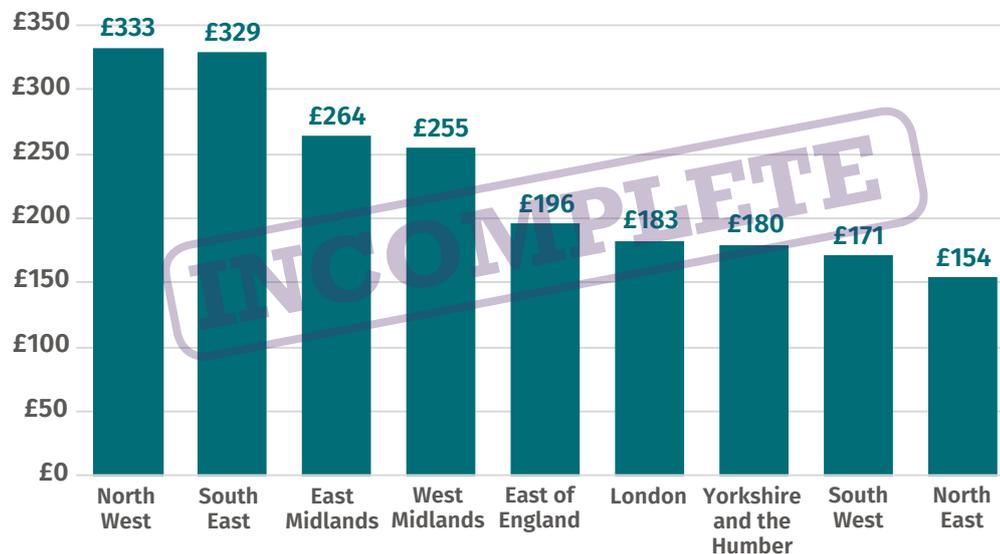
7 Bus regulation powers have now been granted to the mayoral combined authorities in England, but this is a challenging process.

8 All figures exclude investment that is funded only from the private sector unless otherwise stated – see table 3.1. This excludes a total of £5.3 billion.

9 NB IPPR North were only able to include £91.2 billion of spending, for reasons outlined below.

**FIGURE 3.1: THE INCOMPLETE IPA ANALYSIS APPEARS TO SHOW THE NORTH WEST RECEIVING MORE TRANSPORT SPENDING**

IPA analysis 'Central government transport capital spending per head across regions' (2017/18 prices) – Annual average 2018/19–2020/21



Source: IPA and HM Treasury 2018

**3.2. IPPR NORTH ANALYSIS OF PLANNED SPENDING**

We have conducted our own analysis of the latest National Infrastructure and Construction Pipeline (IPA and HM Treasury 2018). It is important to understand the following points which explain the difference between the two. This analysis:

- includes HS2 regional spending estimates based on the IPA’s 2017 pipeline methodology for the whole HS2 project – because this remains the best way to estimate the total cost of HS2 beyond the IPA’s time horizon<sup>10</sup>
- includes all spending beyond 2021 if this is available (£91.2 billion) – but therefore excludes £26.5 billion spending for programmes and projects for which regional spending data is not available
- includes capital spending only, not revenue – because revenue isn’t forecast
- includes all spending for which central government is responsible: *central government*; *central government/local government*; *central government/private*<sup>11</sup>; *local government* – because central government is responsible for local government finance, and the government is accountable when public money is used to leverage in private investment
- does not account for the most recent overspends on Crossrail and speculated increased costs for HS2 – because these are not yet factored into their cost within the pipeline
- does not account for the commitment to Northern Powerhouse Rail in part or in full – because despite government commitments, this project is not yet in the pipeline.

10 The IPA does include HS2 regionally allocated by cost (not economic impact) within the pipeline, but only up to 2021. Therefore, in order to apportion HS2 beyond 2021, to remain consistent, we used the IPA methodology from the 2017 iteration of the pipeline for the whole project.

11 Central government/private spending only amounted to £1.6 billion in the total pipeline.

**TABLE 3.1: COMPARISON OF IPA ASSUMPTIONS ALONGSIDE IPPR NORTH ASSUMPTIONS**

Assumption	IPA analysis	IPPR North analysis
National projects and programmes allocated according to region	Included – though detailed data unavailable to consider	Included – following IPA methodology as far as possible
HS2 allocated by region according to predicted regional benefits	Included – though this methodology varies from other national projects	Included – following IPA methodology despite concerns about consistency of approach
Categories of spending	Only ‘central’ and central component of ‘central/private’, ‘central local’ and ‘central/local/private’ spending category included	Includes ‘central’, ‘central/private’, ‘central/local’, ‘central/local/private’ and ‘local/private’ <sup>12</sup>
Consideration of GLA/TfL spending	Excluded on the grounds funding comes from business rates and fare revenues	Included on the grounds that central government remains responsible for the agreements which underpin these revenue streams
Timeframe considered	Only considers spending up to and including 2020/21	Includes the whole pipeline where possible, on the grounds that this is what the pipeline is intended for

Source: IPPR North

Our analysis based on these assumptions shows that:

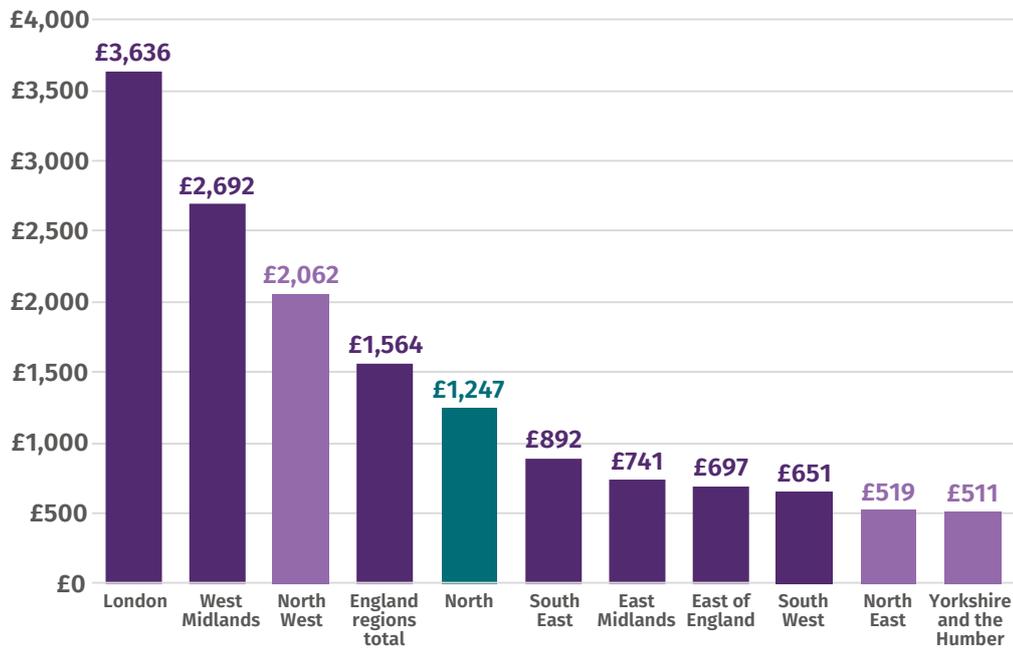
- £3,636 per capita is planned on London, compared to just £1,247 in the North
- planned transport investment on London is therefore 2.9 times higher per capita than on the North
- planned transport spending on London is 7.0 times more per capita than on the North East (£519) and 7.1 times more per capita than on Yorkshire and the Humber (£511 per capita)
- the North West is set to receive more than the England regional average, at £2,062 per capita, but still far less than London, and also less than the West Midlands (£2,692 per capita).

(IPPR North analysis of IPA and HM Treasury 2018)

<sup>12</sup> In practice transport projects all currently fall within the categories of: central government; central government/local government; central government/private; local government; private.

**FIGURE 3.2: PLANNED TRANSPORT SPENDING ON LONDON IS 2.9 TIMES HIGHER PER CAPITA THAN IN THE NORTH**

IPPR North analysis of planned central and local public/private transport infrastructure spending per capita 2018/19 onwards (real terms 2017/18 prices)



Source: IPPR North analysis of IPA and HM Treasury 2018

## 4.

# CONCLUSIONS AND RECOMMENDATIONS

Despite five years of the Northern Powerhouse agenda, the government continues to underinvest in northern transport infrastructure. Our analysis of **historic** spending reveals yet another disproportionate increase in transport spending on London, which has received more than twice as much transport spending per capita than the North each year for a decade. And our analysis of **planned** spending shows that London is set to receive 2.9 times more transport spending per capita than the North.

The government analysis of planned spending is still incomplete. Their analysis still excludes almost two-thirds of planned transport spending by making two assumptions which we think to be flawed: excluding spending beyond 2021 – despite the fact that this is the purpose of the pipeline; and excluding local spending in London – despite the fact that this is still central government’s responsibility, because of the unique financing arrangements in the capital. We are aware that the government response to these figures may well be to challenge some of the assumptions we have made – but we stand by these assumptions and urge the government to be more transparent and consistent. This pattern of spending cannot be justified – despite many efforts to do so.

But this is also an opportunity for a new government. The prime minister has pledged to support and accelerate investment in Northern Powerhouse Rail. This £39 billion project would go a significant way to addressing the gap in spending (although this would depend on progress with the proposed £31 billion Crossrail 2 project in the capital). Transport for the North have also set out a broader programme of investment which, including Northern Powerhouse Rail, comes to £70 billion. The new prime minister has also set out his intention to devolve power to the North and areas within it, and the Williams Rail Review promises to investigate this issue with regard to rail.

The government does need to act, however, and the upcoming spending review presents an important opportunity to do so. We therefore recommend that the government should do the following.

- 1. Deliver on promises to invest in the full Northern Powerhouse Rail project and other projects in the North** – not just the Manchester-Leeds section of the project.
- 2. Build HS2 Phase 2 in the North first** – so that the intra-North connectivity can be established before the project is complete, and so that Northern Powerhouse Rail can be accelerated using its infrastructure.
- 3. Invest in ‘quick wins’ in the North as well as the long-term infrastructure projects** – there are many transport projects which can make a difference in the North and can be delivered relatively soon.
- 4. Devolve a £400 million project development budget to the North** – so that Transport for the North and the transport authorities within the North can bring forward projects for investment.
- 5. Devolve transport powers and fair funding** to the North’s local transport authorities and Transport for the North as appropriate – so that the North can take responsibility for its own infrastructure.

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