

Proposed New Nuclear Power Stations – the potential to contribute to local economies: November 2021 Update

Summary

In June 2020, Development Economics Ltd prepared a paper that assessed the comparative economic performance of eight locations that had been selected by the UK Government in October 2010 as being potentially suitable for the development of new nuclear power stations.

To enable this assessment, 12 wide-ranging indicators of socio-economic performance of candidate host areas were selected based on Office for National Statistics (ONS) data sets. These indicators covered aspects such as demographic characteristics and change, availability of jobs, labour market activity, workforce characteristics, structure of the employment base, earnings, annual contributions to wealth generation and levels of new business formation.

The specific criteria originally selected were as follows:

• Proportion of the population of working age	• Average annual rate of job growth
• Trend in working age population	• Business start-up rate per capita
• Employment rate	• Proportion of employment in Construction
• Spare capacity in local labour force	• Proportion of employment in the Hospitality sector
• Proportion of workforce in relevant occupations	• Full time earnings of residents
• Job density	• Gross Value Added per capita

These criteria were used in the assessment because they are widely used, regularly updated, and are readily available for GB local authority areas from the ONS.

Having assembled the relevant data, an overall assessment of rankings by location was then obtained by aggregating the ranking for each individual indicator and generating an overall average score across all indicators.

The overall rankings from the June 2020 assessment across all indicators is summarised in the table below. Hartlepool (average score 2.75) emerged as the location that would potentially benefit the most from a decision to invest in a new nuclear power station, followed by Wylfa on Anglesey (3.67).

On the other hand, Sizewell in East Suffolk (5.58) occupied the second lowest of the ranking positions.

Overall rankings: 2020 analysis

Site	Local authority area	Average score	Ranking
Hartlepool	Hartlepool	2.75	1
Wylfa	Anglesey	3.67	2
Heysham	Lancaster	3.75	3
Moorside	Copeland	3.83	4
Bradwell	Maldon	5.17	5
Oldbury	South Gloucestershire	5.33	6
Sizewell	East Suffolk	5.58	7
Hinkley Point	Somerset West & Taunton	5.75	8

In January-February 2021 an update was undertaken by Development Economics, using more recent data for the majority of indicators as listed above. However, for one indicator a change had to be made: the ONS is no longer updating the GVA per capita data series for individual local authorities. Instead, a similar ONS dataset was used i.e., the average value of GVA per filled job located in each local authority area. This replacement indicator had the advantage of better reflecting the average productivity of the deployed workforce in each local authority area, plus it also had the advantage of being available for a more recent year (2018).

The conclusion of the updated assessment undertaken in Jan-Feb 2021 was that the location that would benefit most from an investment decision is Moorside in Copeland, followed by Hartlepool and Wylfa (Anglesey). In this assessment East Suffolk occupied the third lowest of the ranking positions with only Somerset West & Taunton and South Gloucestershire possessing a lower aggregate score.

Now, in November 2021, a second update of the assessment has been undertaken by Development Economics using the most current data for the various indicators. Compared to the previous (Jan-Feb 2021) update, revised data was available for 8 out of 12 indicators (and, compared to the original June 2020 assessment, updated data is available for all 12 indicators).

The table below provides a revised set of location rankings based on the data available as of 9th November 2021:

Overall rankings: November 2021

Site	Local authority area	Average score	Ranking
Hartlepool	Hartlepool	3.25	1
Moorside	Copeland	3.42	2
Wylfa	Anglesey	3.92	3
Heysham	Lancaster	4.17	4
Bradwell	Maldon	4.67	5
Sizewell	East Suffolk	4.92	6
Hinkley Point	Somerset W & Taunton	5.67	7
Oldbury	South Gloucestershire	5.83	8

The overall rankings have changed only slightly since the previous (Jan-Feb 2021) update. The two changes are:

- Hartlepool has returned to the top of the table, replacing Moorside (Copeland) as the most advantageous location from a 'levelling up' perspective.
- Oldbury (South Gloucestershire) has replaced Hinkley Point (Somerset West & Taunton) as the least favourable location from a 'levelling up' perspective.

Introduction

Eight sites were selected by the UK Government in October 2010 as potentially suitable as locations for the next generation of nuclear power stations.¹ Of these, development of a new power station is currently underway at one site: at Hinkley Point in West Somerset.

Large infrastructure projects have the potential to create significant levels of local and regional economic impacts. However, the ability of a large infrastructure project to contribute positively to the area that hosts it depends on several variables, such as:

- the ability to provide a local workforce without the need for extended commuting from other population centres;
- the size and structure of the local business base; and
- the presence of industries that could be either positively or adversely affected by the construction and/or operation of the proposed infrastructure project.

The purpose of this paper is to assess each of the shortlisted locations and identify the ones where a decision to build and operate a new power station has the greatest potential to make a net positive contribution towards enhancing the economic performance of host areas.

This paper is an update of an assessment that was originally produced in June 2020 (and which was previously updated in January-February 2021). The methodology used in this update is the same as that used in the original assessment, but there has been a change in terms of one of the indicators used in the assessment which was necessitated by the discontinuation of data available from the ONS. Details of this change are provided below.

Locations

The locations included in the assessment are those nominated by Government as being potentially suited to host a new nuclear power station. These are as follows:

Site Location	Local authority area	Region/country
Moorside	Copeland	North West
Heysham	Lancaster	North West
Hartlepool	Hartlepool	North East
Wylfa	Anglesey	Wales
Sizewell	East Suffolk	East of England
Bradwell	Maldon	East of England
Oldbury	South Gloucestershire	South West
Hinkley Point	Somerset West & Taunton	South West

Indicators

To assess these locations, in common with the approach taken in the original (June 2020) paper we have examined 12 indicators of socio-economic performance that provide a basis of assessing the extent to which each host area could accommodate a development. The criteria are as follows:

Indicator (and most recent date of data used)	Explanation	Source
Proportion of resident population that is working age (2020)	The ONS continue to define working age population as 16-64. A higher proportion of population of working age is an indicator of potential workforce availability.	ONS Population estimates
Change in working age population (2001-2020)	As above. The long term (2001-2020) trend in working age population is an indicator of the availability of	ONS Population estimates

¹ <https://www.bbc.co.uk/news/uk-politics-11564152>

	employment opportunity, with areas of restricted opportunity tending to see out-migration of younger age groups.	
Employment rate (July 2020-June 2021)	The employment rate is a measure of the proportion of the working age population either in employment or who are self-employed. A lower-than-average employment rate is an indicator of restricted economic opportunity.	ONS Annual population survey
Spare capacity in local labour force as a proportion of the working age population (2020)	This is the sum of two indicators as a proportion of the working age population: (1) the number of working age people who are unemployed (according to the International Labour Organisation definition, i.e., currently without a job but ready and available for work) plus (2) the number of currently economically inactive people (i.e., not in employment and not actively seeking work) who report via regular surveys say they would like a job.	ONS Annual population survey
Proportion of workforce in relevant occupations (2020)	The proportion of the resident population that are currently working in managerial, professional, associate professional, skilled trades or who are process/plant/machinery operatives.	ONS Annual population survey
Job density (2019)	The ratio of the total number of jobs (employees and self-employed) located in the area divided by the resident working age population (16-64) of the area.	ONS jobs density data series
Average annual rate of job growth, 2001-2019	The long term (2001-2019) annual change in the total number of jobs located in the area (employee jobs plus self-employed jobs)	ONS jobs density data series
Business start-up rate (per 10,000 working age population) 2019	The latest annual number of new enterprises established in the area divided by the working age population of the area.	ONS Business demography data series
Proportion of employment in the Construction sector (July 2020-June 2021)	The proportion of the jobs located in the area that are found in the Construction and Engineering sector. This is an indicator of the current importance of the sector to the local economy compared to the national average.	ONS Business register and employment survey
Proportion of employment in the Hospitality sector (July 2020-June 2021)	The proportion of the jobs located in the area that are found in the Accommodation and Food & drink services sectors.	ONS Business register and employment survey
Full time earnings of residents as proportion of GB average (2020)	A measure of the business structure and levels of productivity in the local economy	ONS Annual survey of hours and earnings
Gross Value Added per filled job (2019)	A measure of the average annual value of economic activity produced in each area.	ONS GVA by local authority in the UK

The final indicator (GVA/filled job) replaces the original indicator (GVA/capita). This change was necessitated by the discontinuation of the GVA/capita data series at a local authority level by the ONS.

For each indicator, the most up-to-date available data was used in the assessment. Where the indicator concerns a long-term trend, the starting point for the trend analysis is the earliest date for which comparable data is available for all authorities.

Ranking locations

The purpose of collecting data for the 12 indicators is to rank each of the eight potential site locations based on that indicator. The majority of the indicators chosen operate on the demand side of the labour market and are essentially 'needs-based'. For these, the rankings are undertaken from the perspective that locations that have the weakest level of outturn on any individual indicator will be ranked highly as a potential location. For example:

- Locations that possess a relatively low employment rate may suffer from restricted job opportunities compared to other area. The benefit of a large infrastructure investment in these areas would be to create additional employment opportunities – both directly and indirectly – during both the construction and operational phases of a scheme.
- Similarly, areas with low rates of new business formation are exhibiting restricted business and job opportunities. A major new investment in such an area would create new business and enterprise opportunities or compensate for the lack of local enterprise dynamism by creating replacement job opportunities that otherwise would be expected to originate from new business formation and early-stage growth.

However, several of the indicators operate on the supply side of the labour market and assess the potential of the local labour market to supply sufficient quantities of appropriately skilled workers to the construction or operational stages of the project. For example, areas with a higher proportion of working age population or local residents with relevant skills would score more highly on these indicators than areas with relatively low levels of working age population or a lower proportion of the workforce with relevant skills or working in the most relevant occupations.

Results

The results of the assessment for the 12 indicators are described in the section that follows.

Working age population

Despite changes to both normal school-leaving age and state pension age, the ONS continues to use the 16-64 age range to define working age population in the UK's official labour market statistics. The table below provides details of the most recent data for working age population for each of the seven candidate locations plus Hinkley Point site currently under construction.

Working age population (2020), proportion of normally resident population

Site	Local authority area	Working age population (%)	Ranking
Heysham	Lancaster	63.3%	1
Oldbury	South Gloucestershire	62.3%	2
Hartlepool	Hartlepool	61.3%	3
Moorside	Copeland	60.3%	4
Bradwell	Maldon	58.1%	5
Hinkley Point	Somerset West & Taunton	56.8%	6
Wylfa	Anglesey	56.7%	7
Sizewell	East Suffolk	55.6%	8

Source: ONS Population estimates

Lancaster has the greatest proportion of its population being of working age (63.3%). This compares to a GB average of 62.4% (2020). On the other hand, East Suffolk has only 55.6% of its population being of working age, which is the lowest proportion of any of the eight locations considered here.

The locational rankings for this indicator are unchanged from the previous (Jan-Feb 2021) updated assessment.

Trend in working age population since 2001

Nationally, there has been annual growth in the working age population of around 0.68% per annum over the 2001-2020 period. Of the eight areas under consideration here, only South Gloucestershire is close to the overall national rate of increase (0.64% p.a.). The lowest growth has been in Copeland, where the average annual rate of change has been a decline of 0.39% per annum followed by Anglesey (-0.24% p.a.).

The rankings in the table below reflect a needs-based assessment, with the areas suffering the lowest rate of increase judged to be most in need of additional stimulation from large scale infrastructure projects. Copeland is the highest ranked area on this basis, followed by Anglesey.

Annual change in working age population (2001-2020)

Site	Local authority area	Annual growth in working age population (%)	Ranking
Moorside	Copeland	-0.39%	1
Wylfa	Anglesey	-0.24%	2
Bradwell	Maldon	0.06%	3
Hartlepool	Hartlepool	0.14%	4
Sizewell	East Suffolk	0.15%	5
Hinkley Point	Somerset W & Taunton	0.30%	6
Heysham	Lancaster	0.50%	7
Oldbury	South Gloucestershire	0.64%	8

Source: ONS Population estimates

The updated locational rankings for this indicator are largely unchanged from the previous update (Jan-Feb 2021). The only change is that Hartlepool has risen by one place (from fifth to fourth), with East Suffolk moving down one place (from fourth to fifth).

Employment rate

The employment rate is an internationally used statistic of labour market competitiveness. It reflects the number of people in employment (employees and self-employed) as a proportion of the working age population.

Nationally, the average employment rate between July 2020 and June 2021 (the latest period over which local authority level data is available) was 74.4%. Across the eight areas considered here there is a very wide range of data for the same period, with the highest rate (80.8%) found in South Gloucestershire and the lowest (67.6%) found in Hartlepool.

Employment rate (July 2020-June 2021)

Site	Local authority area	Employment rate (%)	Ranking
Hartlepool	Hartlepool	67.6%	1
Moorside	Copeland	70.1%	2
Sizewell	East Suffolk	71.1%	3
Wylfa	Anglesey	73.2%	4
Bradwell	Maldon	73.6%	5
Hinkley Point	Somerset W & Taunton	77.0%	6
Heysham	Lancaster	77.1%	7
Oldbury	South Gloucestershire	80.8%	8

Source: ONS Annual Population survey

Compared to the June 2020 assessment results, the employment rate among the majority of local authority areas has fallen, presumably reflecting the national economic difficulties associated with the Covid19 pandemic. The most significant change in the relative rankings is that affecting Lancaster, which has experienced an increase in its employment rate by over three percentage points and has consequently fallen in the rankings from 3rd to 7th.

Readily available labour pool

One measure of spare capacity in a local economy is the number of individuals who are unemployed – in the sense that they do not have a job but are actively seeking and are available for work. Another measure is the proportion of the economically inactive who state (via survey responses) that they would like a job if one was available.

Local data on the current extent of these two sources of spare capacity data in local labour markets was obtained from the ONS via the NOMIS data portal. The table below presents the sum of these two indicators as a proportion of the working age population of each local authority area.

Model based unemployment plus Economically inactive seeking work (July 2020 – June 2021)

Site	Local authority area	Available Labour pool as a % of working age population	Ranking
Hartlepool	Hartlepool	17.2%	1
Moorside	Copeland	9.3%	2
Wylfa	Anglesey	9.0%	3
Sizewell	East Suffolk	7.7%	4
Bradwell	Maldon	7.4%	5
Heysham	Lancaster	7.2%	6
Hinkley Point	Somerset W & Taunton	6.9%	7
Oldbury	South Gloucestershire	6.4%	8

Source: ONS Annual Population survey

The largest available labour pool in proportionate terms is in Hartlepool (17.2% of the working age population), followed by Copeland (9.3%). Compared to the previous (Jan-Feb 2021) updated assessment results, the numbers of people in the readily available local labour pool have in most cases increased significantly, reflecting the national economic difficulties associated with the Covid19 pandemic. The largest change in the rankings is that experienced by East Suffolk (which has risen from 6th to 4th place) and Lancaster (which has fallen from 4th to 6th position).

Proportion of workforce in relevant occupations

This indicator focuses on the proportion of the normally resident population of each area working in managerial, professional, associate professional, skilled trades or who are process/plant/machinery operatives.

As can be seen in the table below, the highest proportion found amongst the eight areas that is the focus of this analysis is the 63.9% found in Lancaster, followed by 62.8% found in East Suffolk. The lowest proportion is the 57.8% found in Hartlepool.

Occupational structure (July 2020 – June 2021)

Site	Local authority area	Proportion of resident workforce in managerial, professional, skilled trades or who are plant/machinery operatives	Ranking
Heysham	Lancaster	63.9%	1
Sizewell	East Suffolk	62.8%	2
Moorside	Copeland	62.1%	3
Bradwell	Maldon	62.0%	4
Oldbury	South Gloucestershire	61.9%	5
Hinkley Point	Somerset W & Taunton	61.4%	6
Wylfa	Anglesey	60.1%	7
Hartlepool	Hartlepool	57.8%	8

Source: ONS Annual Population survey

Job density

The job density ratio reflects the number of jobs found in an area (employee jobs plus self-employed jobs) as a proportion of the working age population of an area. Nationally, the latest (2019) overall job-density ratio is 0.87. This reflects the fact that not all working age people are economically active, but also that some people have more than one job. Areas with lower-than-average job density tend to see net outward flows of workers who commute to other nearby places to work.

Of the eight local authority areas considered here, the area with the highest ratio is South Gloucestershire. This suggests that the local labour market is quite intensively employed and that there are significant flows of workers from other areas. On the other hand, the ratio for Hartlepool is only 0.60, suggesting that significant numbers of residents of Hartlepool are commuting to other places to work.

Job density ratio (2019)

Site	Local authority area	Ratio of jobs to working age population	Ranking
Hartlepool	Hartlepool	0.60	1
Bradwell	Maldon	0.68	2
Wylfa	Anglesey	0.69	3
Heysham	Lancaster	0.71	4
Sizewell	East Suffolk	0.79	5
Moorside	Copeland	0.91	6
Hinkley Point	Somerset West & Taunton	0.99	7
Oldbury	South Gloucestershire	1.04	8

Source: ONS Annual Population survey

The data for this indicator is unchanged since the previous (Jan-Feb 2021) update so the relative rankings are also unchanged.

Trend job growth (2000-2019)

Historic data used to estimate the jobs density ratio can also be used to estimate the long-term job growth trend for each area. Given the re-organisations affecting some of the local authority areas, the furthest back that consistently defined data is available is the period 2000-2019.

For Great Britain as a whole, the average annual growth rate for workforce jobs over this period has been just under 0.9%. Among the eight areas we are focusing on here, the strongest growth has been found in South Gloucestershire where the average annual growth (2.13% p.a.) is over double the national average. The weakest performance is found in Hartlepool, where the annual growth rate over the same period is an average decline of 0.15% per annum.

For East Suffolk, the average annual rate has been 0.84%, indicating that the area has a similar level of performance as the national economy in terms of generating jobs.

Workforce jobs trend (2000-2019)

Site	Local authority area	Annual growth in workforce jobs	Ranking
Hartlepool	Hartlepool	-0.15%	1
Bradwell	Maldon	0.42%	2
Sizewell	East Suffolk	0.84%	3
Heysham	Lancaster	0.87%	4
Hinkley Point	Somerset West & Taunton	0.92%	5
Moorside	Copeland	1.25%	6
Wylfa	Anglesey	1.33%	7
Oldbury	South Gloucestershire	2.13%	8

Source: ONS Workforce Jobs

The data for this indicator is unchanged since the previous (Jan-Feb 2021) update so the relative rankings are also unchanged.

Entrepreneurship

A frequently used measure of local economic competitiveness is the annual rate of new enterprise formation as a proportion of the working age population. A widely used statistic measuring relative rates of enterprise formation is the annual number of new starts per 10,000 working age population.

Amongst the eight areas that is the focus of this report, the area with the lowest level of entrepreneurship is Copeland (47.3) followed by Anglesey (49.1).

Entrepreneurism (2019)

Site	Local authority area	Annual new business registrations per 10,000 working age population	Ranking
Moorside	Copeland	47.3	1
Wylfa	Anglesey	49.1	2
Hartlepool	Hartlepool	54.4	3
Heysham	Lancaster	56.3	4
Sizewell	East Suffolk	65.8	5
Oldbury	South Gloucestershire	72.5	6
Hinkley Point	Somerset W & Taunton	94.3	7
Bradwell	Maldon	100.3	8

Source: ONS Business demography datasets; ONS Population estimates

The data for this indicator is unchanged since the previous (Jan-Feb 2021) update so the relative rankings are also unchanged.

Proportion of employment in Construction and Civil Engineering

A relevant indicator is the proportion of the jobs located in the area that are found in the Construction and Engineering sector. This is an indicator of the current importance of the sector to the local economy compared to the national average, which in turn is a proxy for the capacity of the local economy to respond positively to the supply chain opportunities created during the extended construction phase of a major infrastructure project.

Nationally, the average proportion of the workforce accounted for by the Construction and Civil Engineering sector is 4.9%. In the eight areas we are considering the proportion ranges from a low of 4.2% (Lancaster) to a high of 11.3% (Maldon).

Relative importance of the Construction and Civil Engineering sector (2020)

Site	Local authority area	Proportion of employment accounted for by Construction and Civil Engineering	Ranking
Bradwell	Maldon	11.3%	1
Moorside	Copeland	7.5%	=2
Wylfa	Anglesey	7.5%	=2
Oldbury	South Gloucestershire	6.5%	4
Sizewell	East Suffolk	5.4%	5
Hartlepool	Hartlepool	5.2%	6
Hinkley Point	Somerset W & Taunton	5.1%	7
Heysham	Lancaster	4.2%	8

Source: ONS Business register and employment survey

The most significant change compared to the previous updated assessment (Jan-Feb 2021) is the placing for Anglesey, which has gone from sixth to equal second place (i.e., now sharing the ranking with Copeland).

Proportion of employment in the Hospitality sector

Another useful indicator is the proportion of the jobs located in the area that are found in the Accommodation and Food & drink services sectors. This is used as an indicator of the potential vulnerability of hospitality sector employment from displacement of activity during the construction phase of the development. Across Great Britain, the overall average contribution to the workforce made by the Accommodation & food services sector is 7.7%. The proportions of employment accounted for by this sector in the eight areas considered here range from a low of 5.2% (South Gloucestershire) to a high of 17.5% (Anglesey).

Relative importance of the Accommodation, Food & drinks services sector (2020)

Site	Local authority area	Proportion of employment accounted for by Accommodation & Food & drink services	Ranking
Oldbury	South Gloucestershire	5.2%	1
Moorside	Copeland	5.8%	2
Heysham	Lancaster	8.3%	3
Hartlepool	Hartlepool	8.6%	4
Hinkley Point	Somerset W & Taunton	8.7%	5
Sizewell	East Suffolk	9.8%	6
Bradwell	Maldon	10.0%	7
Wylfa	Anglesey	17.5%	8

Source: ONS Business register and employment survey

The most significant change in the rankings compared to the previous update (Jan-Feb 2021) is the ranking for Maldon, which has changed from 5th to 7th.

Average earnings of full-time workers (by place of residence)

Average earnings earned by residents reflects both the local employment and other income-generating opportunities available locally as well as those available within a commutable distance. The dataset used here covers gross weekly earnings for full time employees as a proportion of the national (GB) average.

From the perspective of ‘levelling up’, the strongest contribution to national wellbeing would be to create additional income generating opportunities in the areas with the lowest average weekly earnings. On this indicator Anglesey – where average earnings for full time workers is only 91.1% of the GB average – would be the best location for new investment whilst Copeland (132.4%) would be the least advantageous location.

Average weekly earnings (full time workers) (2020)

Site	Local authority area	Average weekly earnings by place of residence (as a proportion of the GB average)	Ranking
Wylfa	Anglesey	91.1%	1
Heysham	Lancaster	93.7%	=2
Hartlepool	Hartlepool	93.7%	=2
Hinkley Point	Somerset W & Taunton	95.1%	4
Sizewell	East Suffolk	103.1%	5
Oldbury	South Gloucestershire	103.4%	6
Bradwell	Maldon	118.4%	7
Moorside	Copeland	132.4%	8

Source: ONS Annual survey of hours and earnings

There is no change in the rankings in this updated assessment for this indicator compared to the original assessment.

Gross Value Added per filled job

Gross Value Added (GVA) is a widely used statistic reflecting the contribution that sub-national areas, specific industries, and individual companies make towards Gross National Product. Areas with higher-than-average levels of GVA per capita are thereby the most prosperous areas of the country.

The original assessment used GVA per capita data for each local authority. Unfortunately, this dataset was based on ONS data that is no longer being updated. To fill this gap, we have instead used alternative data from the ONS concerning average levels of GVA per filled job in each local authority area. Data for this indicator is available for years up to 2019.

On the basis that a frequently stated Government objective is to facilitate ‘levelling up’ between areas with differing levels of prosperity, the best approach would be to facilitate the creation of additional wealth-generating activities in areas with below average levels of GVA per worker. On this indicator Anglesey would be the best location to encourage or facilitate new investment whilst East Suffolk would be the least advantageous location.

GVA per filled job (2018)

Site	Local authority area	GVA per filled job	Ranking
Wylfa	Anglesey	£41,995	1
Hinkley Point	Somerset W & Taunton	£44,314	2
Heysham	Lancaster	£45,842	3
Moorside	Copeland	£46,138	4
Hartlepool	Hartlepool	£52,855	5
Oldbury	South Gloucestershire	£57,310	6
Bradwell	Maldon	£58,122	7
Sizewell	East Suffolk	£58,681	8

Source: ONS productivity stats, 2018

Conclusion: overall ranking of locations – November 2021

An overall assessment of rankings by location can be obtained by aggregating the ranking for each individual indicator and generating an overall average score across all indicators.

The overall rankings across all 12 indicators as of November 2021 are summarised in the table below, with Hartlepool (average score 3.25) emerging as the location that would potentially benefit the most from a decision to invest in a major infrastructure project. The location that is second in the ranking is Moorside in Copeland (3.42), followed by Wylfa on Anglesey (3.92).

Overall rankings: November 2021

Site	Local authority area	Average score	Ranking
Hartlepool	Hartlepool	3.25	1
Moorside	Copeland	3.42	2
Wylfa	Anglesey	3.92	3
Heysham	Lancaster	4.17	4
Bradwell	Maldon	4.67	5
Sizewell	East Suffolk	4.92	6
Hinkley Point	Somerset W & Taunton	5.67	7
Oldbury	South Gloucestershire	5.83	8

On the other hand, East Suffolk (4.92) occupies the third lowest of the ranking positions with only Somerset West & Taunton (5.67) and South Gloucestershire (5.83) possessing a greater average score.

The overall rankings have changed only slightly since the previous (Jan-Feb 2021) update. The two changes are:

- Hartlepool has replaced Moorside (Copeland) as the most advantageous location from a ‘levelling up’ perspective
- Oldbury (South Gloucestershire) has replaced Hinkley Point (Somerset West & Taunton) as the least favourable location from a ‘levelling up’ perspective.