



Cebr 2023 report summary

openreach

The gigabit economy – a national success

In 2019 and [2021](#) we commissioned the Centre for Economics and Business Research (Cebr), a leading economics consultancy, to do independent pieces of research looking at the impact of our rollout of Full Fibre broadband across the United Kingdom. The research focussed on productivity and the workforce benefits. In 2023 we then asked Cebr to update their analysis.

Recognising that the world has changed since the dramatic events of 2020, we decided it was time to re-examine these projected benefits, taking into account the progress we have already made.

In March 2023, we reached the milestone of making Full Fibre broadband available to 10 million premises, connecting 3 million customers along the way. All part of our £15 billion investment to provide reliable, fast broadband that meets the needs of our modern lives.

The Headline

This updated research from the Centre for Economic and Business Research (Cebr) confirms overwhelmingly positive impacts both on the number of people in the workforce and output per worker of Full Fibre broadband.

Taken together, the productivity and workforce boosts to GVA will total £56 billion in 2026, and **£72 billion in 2030**.

This is the equivalent of 294,960 new small and medium-sized enterprises being created across the country or adding 25 new businesses in every local council area in the UK.

Productivity

£59 billion. This was the estimated annual uplift Full Fibre broadband would add to Britain's GVA according to the 2019 research. In 2022 prices, this is now £69 billion.

This updated analysis takes account from planned rollout so far, adding confidence to estimated benefits now on track to be worth £42 billion a year by 2026 in terms of productivity gains alone rising to £54 billion by 2030.

That means an annual uplift to productivity of £1,323 per worker in just three years' time.

Summary national results

GVA (£ million, 2022 prices)	2026	2030	2022-2030 PV
Productivity impact	42,310	53,688	271,460
Workforce impact	14,009	18,002	85,708
Total impact	56,319		357,168

Workforce

Similarly, the updated analysis on workforce impacts from the rollout already achieved adds to confidence of 2026 projections.

These now show an estimated 431,000 additional workers in the UK, representing a 1.4% boost to employment in three years. By 2030, this is on course to reach 533,000, contributing £18 billion to the economy.

The modelling indicates the bulk of this growth to the workforce will come from parents by 2026. We estimate an additional 187,000 women with dependent children will be participating in the labour market, contributing £5.6 billion in GVA. Meanwhile an extra 114,000 older workers and 130,000 informal carers will be enabled to work thanks to the Full Fibre roll-out by 2026, according to the estimates.

The trend is set to continue and by 2030 we will see an extra 533,000 Carers, Parents and Older Workers added to the UK workforce.

The corresponding GVA impact is £14 billion in 2026, or **£18 billion in 2030**.

Summary national results

Employment	2026	2030
Carers	129,834	157,166
Parents	186,672	222,875
Older workers	114,336	153,407
Total	430,842	533,448

Nations and regions impact

Cebr breaks this information down for us so we can see GVA impact of productivity and workforce effects combined in England, Scotland, Wales and Northern Ireland. The data is split further so we can look and at the regions such as the South West, the Midlands, the South East and the North.

By 2030 the roll out of Full Fibre broadband is expected to have added **£4.5bn** to Scotland, **£2.2bn** to Wales and £155m to Northern Ireland. For England that figure is **£65bn**.

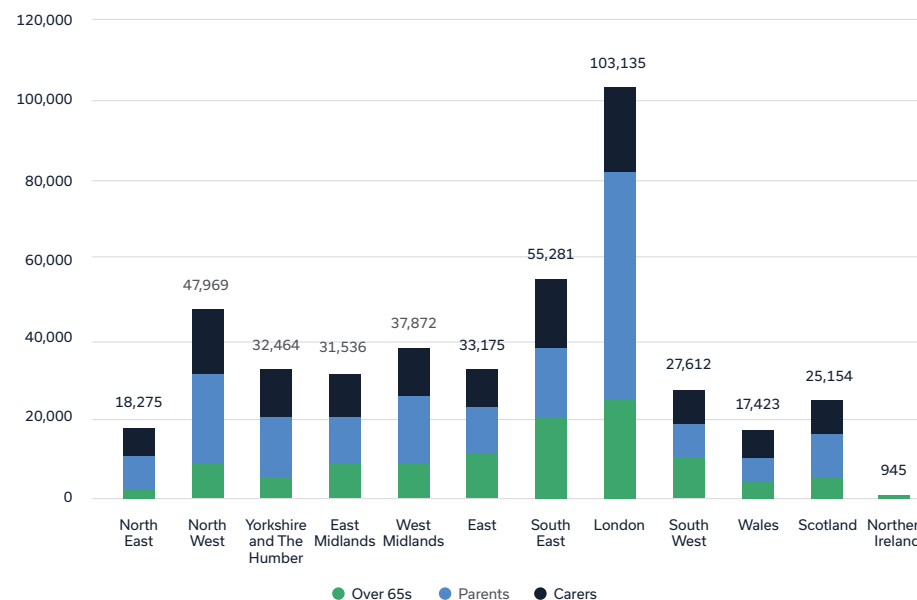
Spotlight on regions

There are some great figures for the regional impact as well.

Region	2030 combined productivity and workforce impact (£bn)
The Midlands & East Anglia	£14.2
The North	£13.8
The South	£14.8
London	£22.0

In the next three years...

The graph below shows the number of additional parents, carers, and older workers the rollout of Full Fibre broadband will help into employment by 2026, broken down by region.



We are also able to provide workforce and productivity figures by constituency, or local authority, so if you're an MP, Mayor or Councillor, please get in touch via public.affairs@openreach.co.uk to discuss how you can play your part in supporting a pro-growth capital investment agenda, supporting our build, and delivering Full Fibre to your constituents and to the nation.

Case study

Powering up Public Services

As well as improving the broadband that people use on a daily basis, the upgrade is set to improve the quality of the UK's public services.

Openreach has already made Full Fibre available to over 9,000 medical facilities including GP surgeries, hospitals and research labs across the country. Ultrafast broadband will benefit health services by improving connections with experts, remote monitoring of patients, easier access of records and faster appointments. The future applications are also exciting, such as the use of AI to achieve better health outcomes by helping review, triage and refer patients based on diagnostic scans and data.

Openreach has also made Full Fibre available to over 13,500 educational facilities such as nurseries, schools and universities, improving online learning facilities for students nationally.

