

A young girl with curly hair, wearing a green sweater, is sitting on the floor and holding a black video game controller. She is smiling and looking towards the camera. Next to her, an older man with glasses and a yellow sweater is also sitting on the floor, holding a black video game controller. He is looking off to the side with a focused expression. The background shows a potted plant and a window. A large green circular graphic is overlaid on the right side of the image.

# Impacts of Full Fibre Rollout

A 2024 summary of the spatial, employment and social impacts of Openreach's Full Fibre Rollout Programme.

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# Delivering ultrafast broadband to the nation

Openreach has commissioned the Centre for Economics and Business Research (Cebr) and Stantec to produce a joint report into the impact of our rollout of Full Fibre broadband across the nations and regions of the UK.

Using data from the existing and planned roll out, this report estimates the spatial, employment and social impacts of Full Fibre on the next 5 and 10 years, coinciding with the electoral calendar. This follows independent pieces of research we commissioned from the Cebr in 2019, 2021 and 2023 evaluating the impact of our rollout across the United Kingdom.

## The Headlines

This updated research from the Cebr confirms overwhelmingly positive impacts on productivity and workforce, supporting the government's growth mission. Taken together, the productivity and workforce boosts to Gross Value Added (GVA) will total £66 billion per year by 2029 and £73 billion per year by 2034.

| <b>GVA (£ million, 2023 prices)</b> | <b>2029</b>   | <b>2034</b>   | <b>2024-2030 PV</b> |
|-------------------------------------|---------------|---------------|---------------------|
| Productivity impact                 | 46,838        | 51,972        | 226,230             |
| Workforce impact                    | 19,297        | 21,121        | 93,826              |
| <b>Total impact</b>                 | <b>66,135</b> | <b>73,092</b> | <b>320,056</b>      |

The report estimates that our rollout could bring over 620,000 people back into the workforce by the end of this parliament, which is worth over £19 billion per year to the UK economy by 2029. By the end of 2034, 652,000 people could be back in work, adding over £21 billion per year to the UK economy. Crucial at a time when a quarter of people of working age are not in work<sup>1</sup>.

| <b>Employment</b> | <b>2029</b>    | <b>2034</b>    |
|-------------------|----------------|----------------|
| Carers            | 217,562        | 221,824        |
| Parents           | 225,962        | 231,107        |
| Older workers     | 176,977        | 199,040        |
| <b>Total</b>      | <b>620,501</b> | <b>651,971</b> |

## Reinvigorating local and rural economies

The working world has changed dramatically since the pandemic, and the ability to work flexibly provides people across the UK with the freedom to work from home and live further from their place of work. Our research highlights that by 2029 there will be 1.4 million home workers, an increase of nearly 900,000 on 2024. With enhanced digital connectivity, physical proximity becomes less important.

Full Fibre development has the potential to reinvigorate local and rural economies across the country, reversing current trends of rural depopulation.

As more people switch away from commuting, it's modelled that some of the time saved commuting will be spent working.

### *Estimated number of new home workers and GVA impact (2024 £ million)*

| <b>Year</b>                    | <b>2024</b> | <b>2029</b> | <b>2034</b> |
|--------------------------------|-------------|-------------|-------------|
| <b>Additional home workers</b> | 562,378     | 1,456,973   | 1,482,508   |
| <b>Addition to GVA £m</b>      | 1,392       | 3,779       | 4,052       |

<sup>1</sup> Unemployment: Who are the millions of Britons not working? - BBC News

## Environmental Impact

Our impact on the environment shapes our decision-making and it challenges us to think about how we can do things better.

The reduction in commuting trips brought about by increased home working can be expected to deliver environmental benefits. The report estimates that by 2034 an annual saving of over 400 million commuting trips will be realised. 258 million of these trips would have been made by car, which equates to 4 billion less kilometres travelled by car every year.

This is equivalent to over 320,000 tonnes fewer of carbon dioxide emitted annually from 2034, after allowing for the decarbonisation of our vehicle fleet. That is more than the current CO2 emissions of the entire telecommunications industry.

## Delivering Social Value

Beyond the impacts of improved connectivity on the economy and society, the rollout itself is an enormous undertaking – the second largest infrastructure project in the UK after HS2. This provides the opportunity for the delivery of social value.

Openreach boosts small and medium sized enterprises to the tune of £1.2 billion per year, and through our onboarding process for contracts, nearly 16,000 partners have been through modern slavery and ethical work training.

Internally, our staff gave over 8,250 hours of time volunteering with different causes last year, equating to 1,100 days.

## Education

The internet is a powerful tool for education, and online learning tools have been widely adopted in schools across the UK, enhanced by necessity through the pandemic.

An ultrafast, ultra-reliable connection supports access to knowledge and information, expands students' capabilities for independent research, and facilitates greater use of individualised learning programs based on students' learning styles.

Based on our existing rollout and future plans, our research shows that over 13,000 pupils, 1% of the total number of Key Stage 2 students, could achieve pass rates or higher at Key Stage 2 Maths, Reading and Writing as a result of the increase in Full Fibre connectivity between 2023 and 2029.

Over 8,700 pupils, 1% of the total number of Key Stage 4 students, could achieve pass rates or higher at Key Stage 4 Maths and English as a result of the increase in Full Fibre connectivity between 2023 and 2029.

## Making more NHS appointments available

Through enabling digitisation Full Fibre broadband is crucial in improving access and supporting plans to give NHS patients access to online or video appointments.

As a result of our rollout, we're enabling approximately 5 million more online and video appointments by 2029, when compared with 2024. This is over a 50% increase in currently online and video appointments, per NHS data.

The Government and NHS has to invest £0 to realise a 1% increase in share of appointments taking place online from now until 2029 – our rollout makes this possible.

Openreach has already made Full Fibre available to over 13,400 medical facilities – including hospitals, GP surgeries and pharmacies across the country, as well as 8,300 care and nursing homes.



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## Case study

# Powering up Public Services

One key example of Full Fibre improving access, is eConsult. eConsult is a platform used by the NHS to provide patients with a means to interact with their GP online, enabling a more efficient use of resources.

Operating in roughly 1 in 3 GP practices, eConsult has supported over 50 million patients to access care online.

Platforms like eConsult are just the beginning of the technological transformation for the healthcare industry. In the words of Dr Ellender “the rollout of Full Fibre enables every single patient, wherever they are, to access their GP online.”

Further adoption of digital tools will help to reduce waiting times, reduce GP workloads and drive innovations. However, this needs to be underpinned by world-class digital infrastructure.



*Dr Murray Ellender, CEO of eConsult*



## Get in touch

For further information on the findings of this report, please get in touch at [public.affairs@openreach.co.uk](mailto:public.affairs@openreach.co.uk).

We also offer caseworker training sessions to help with problems such as fibre availability / workmanship / reinstatement concerns / network objections / digital switchover and much more. If you feel your team could benefit, please do get in touch.

We would be delighted to discuss how you can play your part in supporting a pro-growth, capital investment agenda, supporting our build and delivering Full Fibre broadband to your constituents and the nation.

