

2025 Edition

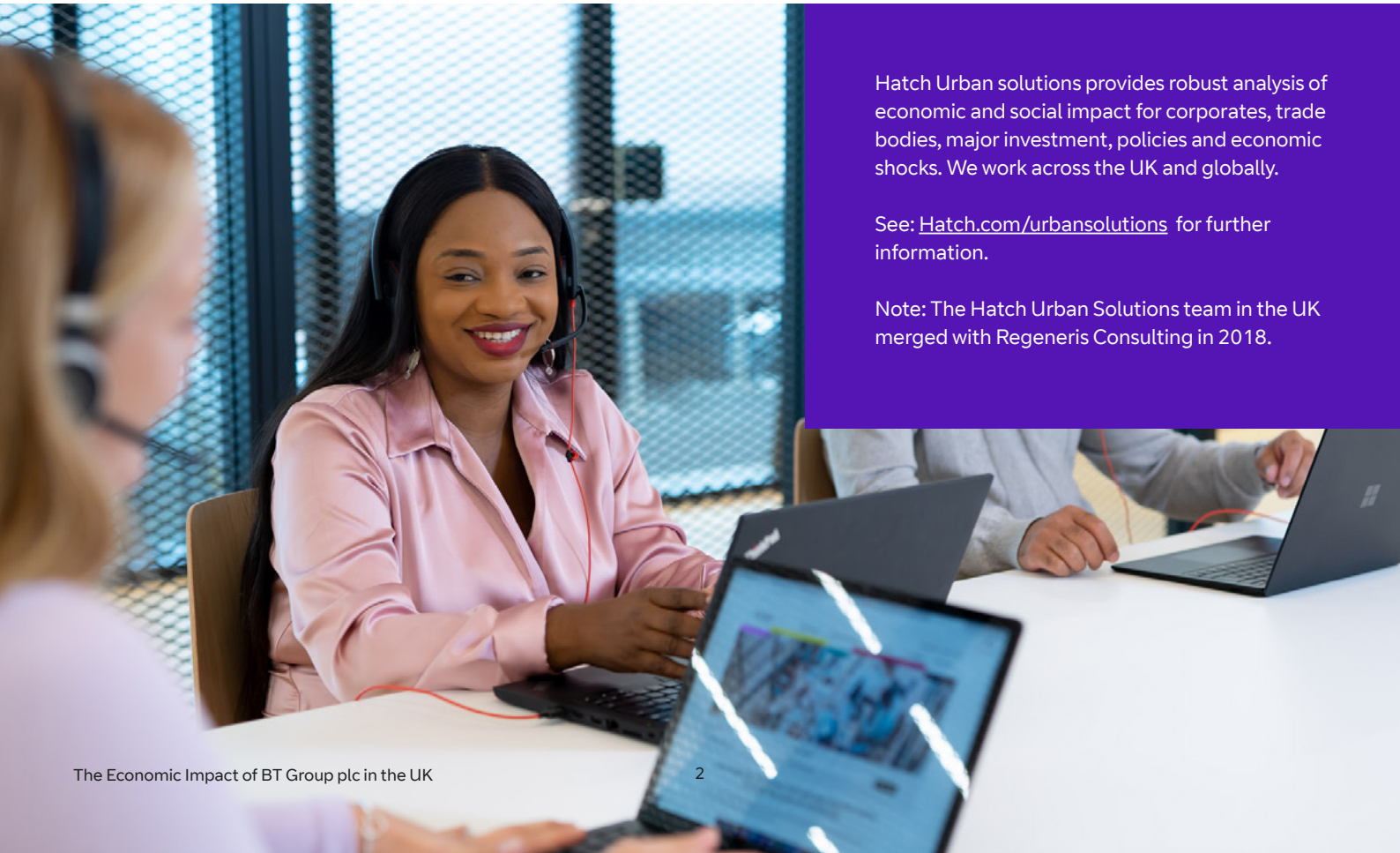
The Economic Impact of BT Group plc in the UK



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Hatch Urban solutions provides robust analysis of economic and social impact for corporates, trade bodies, major investment, policies and economic shocks. We work across the UK and globally.

See: Hatch.com/urbansolutions for further information.

Note: The Hatch Urban Solutions team in the UK merged with Regeneris Consulting in 2018.

Introduction

Supporting the UK

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Introduction

BT Group delivered £23 billion to the UK economy in 2023/2024



Few companies have the footprint and presence across our nations and regions that BT Group does.

During my first year I have spent time with customer-facing and frontline colleagues across many locations – from contact centres and retail stores, to technology hubs and masts in rural fields. The impact we have is far-reaching and crystal clear, enabling the digital upgrade of the country which underpins our ambition to be the UK's most trusted connector of people, business and society.

BT is investing in a once-in-a-generation upgrade of our nation-wide broadband and mobile networks. The scale of these projects mean we are the FTSE 100's largest capex investor into the UK. Through Openreach, the full fibre broadband network we are building is one of the UK's most successful private sector infrastructure projects, calculated to be worth £72bn to the UK's economy by 2030*. Along with EE's 5G networks, these networks will fuel the UK's future prosperity – including, among other things, the proliferation of AI technologies, boosting productivity for British businesses and unlocking economic growth.

We employ over 80,000 people directly in the UK. Whether they are engineers delivering the networks on which we are ever-more reliant, teams in offices supporting everyone from individuals to multinational organisations, or colleagues working in our retail stores to help shoppers choose the best product for them, our people are essential in ensuring all our customers can make the most of the digital world.

* Source: [Openreach](#)

We publish this Economic Impact Report so that, behind the headline of the £23bn contribution to the UK economy, you can understand BT's presence in the parts of the country that matter to you: what our workforce looks like in your area, where the 212,000 jobs we support are located, and how much of the £9.6bn that we spend with UK suppliers and subcontractors goes to your local businesses.

Since 2019, we have been moving ahead to complete the biggest workplace transformation project that has been seen across England, Scotland, Wales and Northern Ireland: the Better Workplace programme. Through it, we have opened brand new hub locations, and refurbished larger offices in the UK's nations and regions.

Since our previous report, these offices have been joined by state-of-the-art centres of excellence – such as Sheffield, where our 24/7 operational monitoring experts keep our customers' networks running smoothly and securely, or our teams in Dundee supporting small and medium sized businesses, and the public sector.

The publication of this report coincides with the completion of our final new regional hub to serve the North West of England, at New Bailey in Salford, Greater Manchester. Providing a base to around 2,000 colleagues, this flagship office is comparable to the already completed sites in Cardiff, Birmingham, Belfast, Bristol, Glasgow and our headquarters in London.

In addition to all this, there are the intangible benefits across the country as we build digital skills, from equipping young people with the skills they need in the modern workplace, to helping the elderly to access essential services online, and supporting small businesses so that they can tap into new markets and grow securely.

BT's networks connect our customers to the people and places that matter most to them, and the investments in our workforce and workplaces connect us to communities we serve right across the UK. Together, these connections are more important than ever, and I am proud to lead BT as we build the foundations for sustainable growth and help to unlock economic opportunity and prosperity in the years to come.

Allison Kirkby

Chief Executive, BT Group

Our report

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Our report

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The Economic Impact Report 2025 has been prepared independently by Hatch Urban Solutions, drawing upon data for BT Group.

Estimates in this report relate to BT Group plc activities in the UK during the financial year 2023/2024. Procurement data relates to that year while the headcount data was collected for July 2024. BT Group plc includes all wholly owned subsidiaries, including Openreach Limited and EE (now part of the Consumer unit).

Further information about BT Group's activities can be found in the BT Group plc Annual Report 2024.

Impact calculations are in accordance with Government guidelines and the HM Treasury's Green Book Guidance for appraisal and evaluation, and are consistent with the Office for National Statistics' national accounts.

Details of our approach are shown in Appendix 5.

Economic Impact Report 2025

This study shows BT Group's economic contribution to the UK national economy and to regional economies in terms of jobs, output and Gross Value Added (GVA) supported. The report covers several effects of BT Group's activities:

Direct impact: people employed directly by BT Group (including contractor employees) who receive wages and salaries.

Indirect impact: income and employment created with suppliers as a result of BT Group's spending on goods and services.

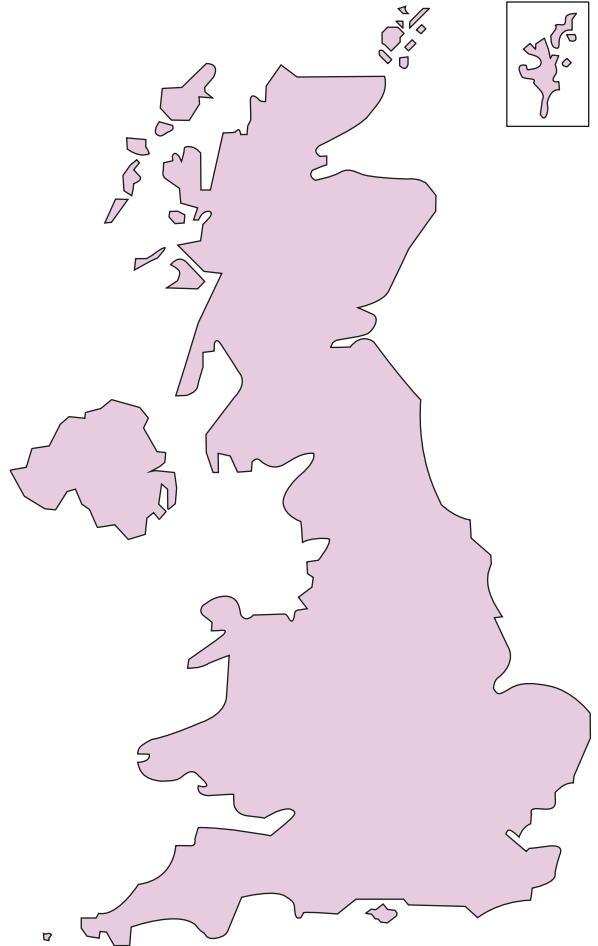
Induced impact: further income and employment generated as wages created directly and indirectly are spent within the economy.

The economic impact of BT Group in the UK

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Key points – Across the UK in 2023/24

- **69,700 employees** directly working for BT Group, and 15,500 contractors (FTE)
- **212,000 total FTE jobs** supported (including indirect and induced effects)
- **£3.4 billion** total income of BT Group employees (including contractors)
- **£9.6 billion** spend with suppliers based in the UK
- **£22.8 billion** total GVA impact associated with BT Group activities (including indirect and induced effects)
- BT Group directly employed **1 in every 260 employees** in the private sector across the UK, and **1 in every 16** in the IT and Communications sector
- BT Group directly created **£1 in every £195** of GVA in the UK
- As a result of the full economic impact of BT Group, the firm supported **£1 in every £100** of GVA in the UK economy and **1 in every 100 employees** working in the UK economy



The figures below show the number of employees working in each English region, Scotland, Wales and Northern Ireland.

	Working	Living	Spend with Suppliers £m	Total direct GVA £m
East of England	7,100	8,270	650	1,070
East Midlands	2,700	3,820	160	340
London	11,520	8,470	4,130	1,970
North East	7,270	0,350	70	750
North West	9,520	9,290	560	1,230
South East	7,220	8,900	2,420	910
South West	8,160	7,660	410	1,190
West Midlands	9,530	8,880	450	1,310
Yorkshire and the Humber	6,570	6,220	390	830
Scotland	7,630	7,700	180	940
Wales	4,540	5,180	130	490
Northern Ireland	3,480	3,490	90	470

Note: Three digit figures are rounded to 2 significant figures.

Figures with more than three digits are rounded to 3 significant figures.

Source: Hatch

Economic impacts

Direct impact

BT Group directly employs a total of 69,700 people in the UK, with a further 15,500 employed as contractors. These employees have an associated £3.4 billion in wages and salary spend.

Procurement impact (Indirect)

BT Group spent a total of £9.6 billion with UK based suppliers in 2023/24. This results in significant benefits for the UK economy, including knock-on benefits further down the supply chain, which results in additional employment and output. This is summarised below.

BT Group supply chain spend in the United Kingdom = £9.6 billion

79,300
FTE



Employment supported amongst suppliers

£7.1
billion

£££

GVA generated

Figure 3-1: Indirect (supply chain impacts)

Source: Hatch



Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and their contractors based in the UK earned around £3.4 billion in 2023/24 before tax. In turn, the expenditure of these employees, contractors and the employees working for firms within BT Group's supply chain

supported further employment and output in consumer industries. Through these knock-on effects, BT Group supported further jobs and turnover as shown below.

Salaries of BT Group employees and contractors in the United Kingdom = £3.4 billion

47,300
FTE



Employment supported

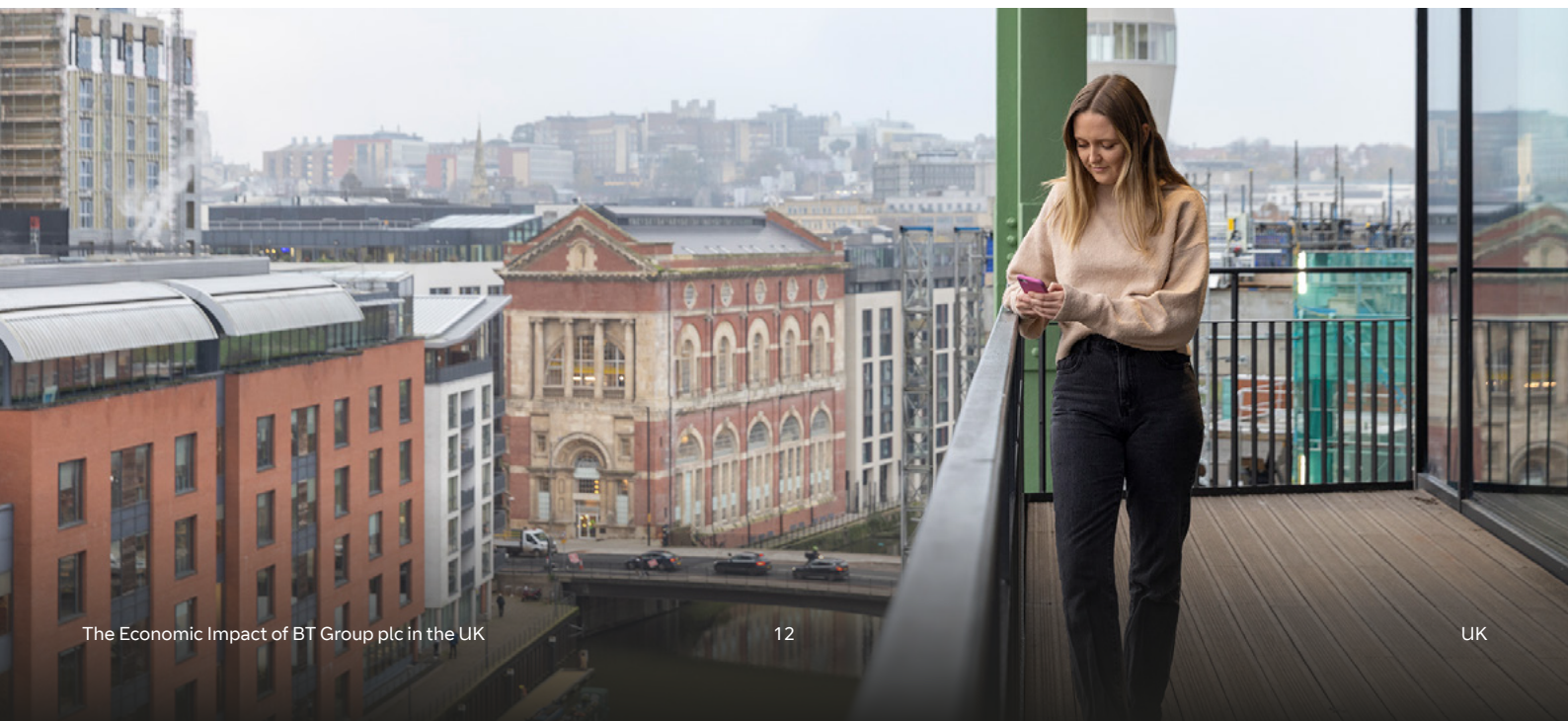
£4.2
billion



GVA generated

Figure 3-2: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the UK

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of BT Group’s operations in the UK in 2023/24. This is summarised below.

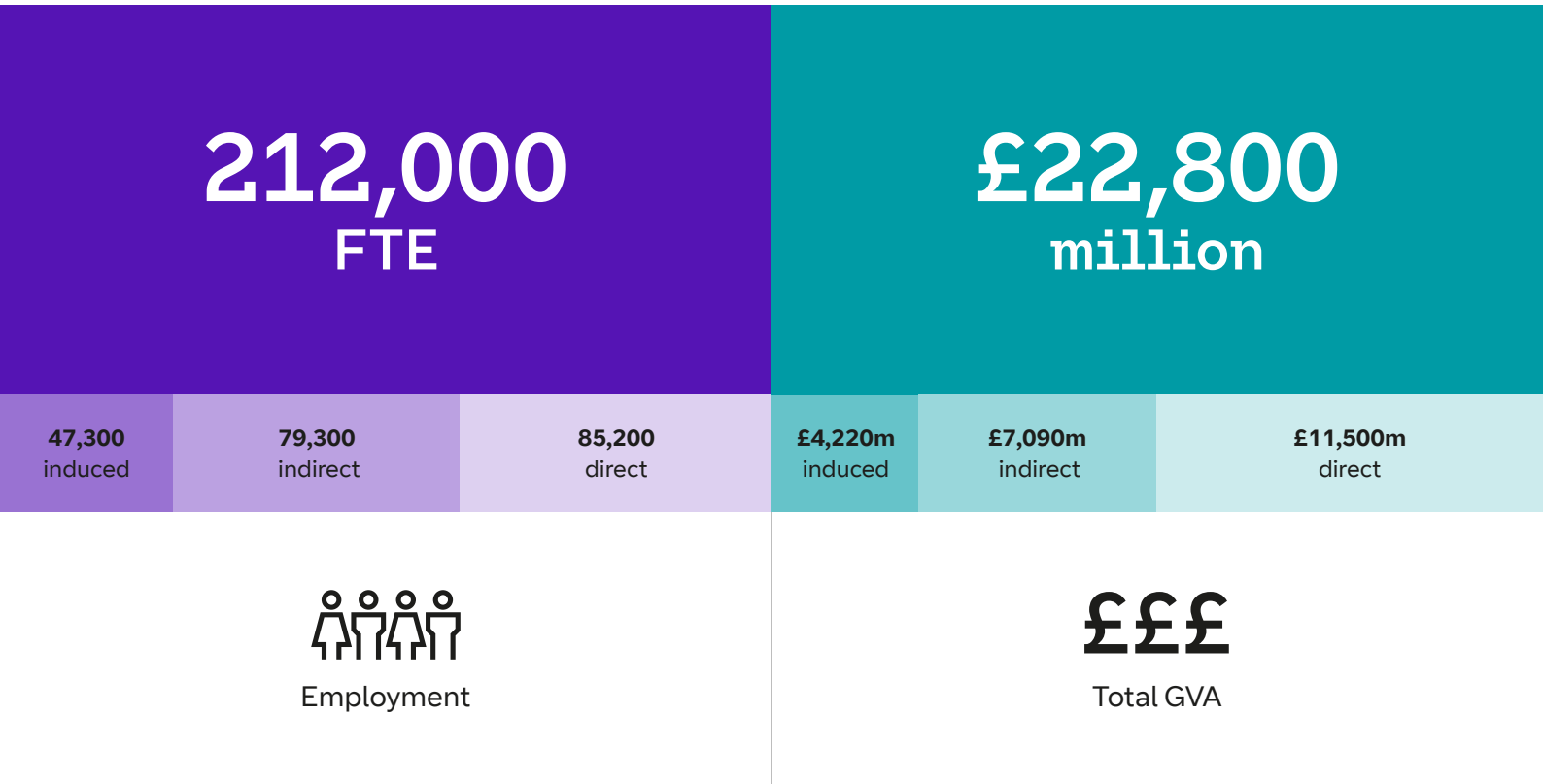


Figure 3-3: Total impact of BT Group

Source: Hatch

BT Group across the UK

East of England	16
East Midlands	24
London	31
North East	38
North West	44
South East	51
South West	60
West Midlands	67
Yorkshire and the Humber	74
Scotland	80
Wales	87
Northern Ireland	94

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BT Group in the UK nations and regions

This section presents key statistics on the economic impact of BT Group for each of the English regions, Scotland, Wales and Northern Ireland.

These geographies are presented in order as follows:

1. East of England
2. East Midlands
3. London
4. North East
5. North West
6. South East
7. South West
8. West Midlands
9. Yorkshire and the Humber
10. Scotland
11. Wales
12. Northern Ireland

To go straight to the information for your area, please click on your location.

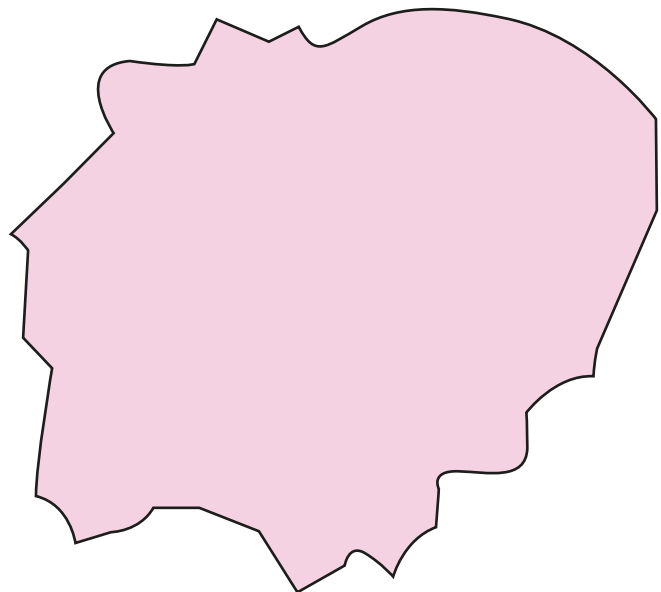
East of England



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Key points – Across the East of England in 2023/24

- **8,270 BT Group employees** live in the region (FTE)
- **7,110 BT Group employees** work in the region (FTE)
- **£310 million** total income of BT Group employees working in the region
- **£650 million** spend with suppliers based in the region
- **£1,950 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 280 employees** working in the private sector, and **1 in every 12 employees** working in the IT and Communications sectors
- **£1 in every £180** of GVA was generated directly by BT Group
- BT Group supported **1 in every 120 employees** working in the private sector and **£1 in every £100** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 6,000 people in the East of England, with a further 1,100, employed as contractors. These employees earned £310 million in wages and salaries.

Procurement impact

BT Group together spent around £650 million with suppliers based in the East of England in 2023/2024. The largest item was telecommunications, as illustrated below.

Total spend **£650 million**

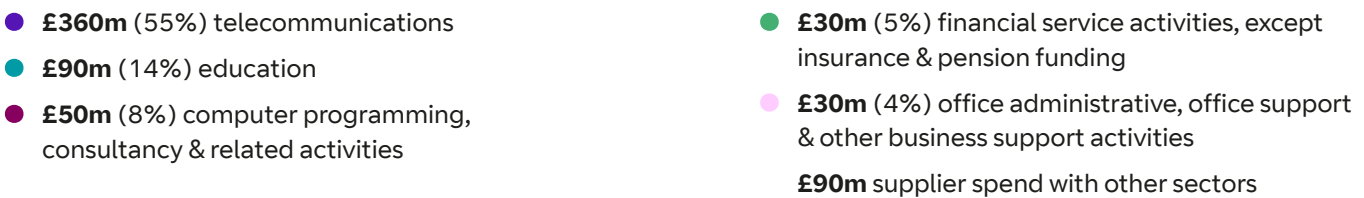


Figure 4-1: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the East of England economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the East of England = £650 million

5,700
FTE

Employment supported amongst suppliers

£510
million

GVA generated

Figure 4-2: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the East of England earned £390 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-3 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the East of England = £390 million

4,200
FTE



Employment supported in consumer industries

£370
million

£££

GVA generated

Figure 4-3: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the East of England

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the East of England. This is summarised in Figure 4-4 below.

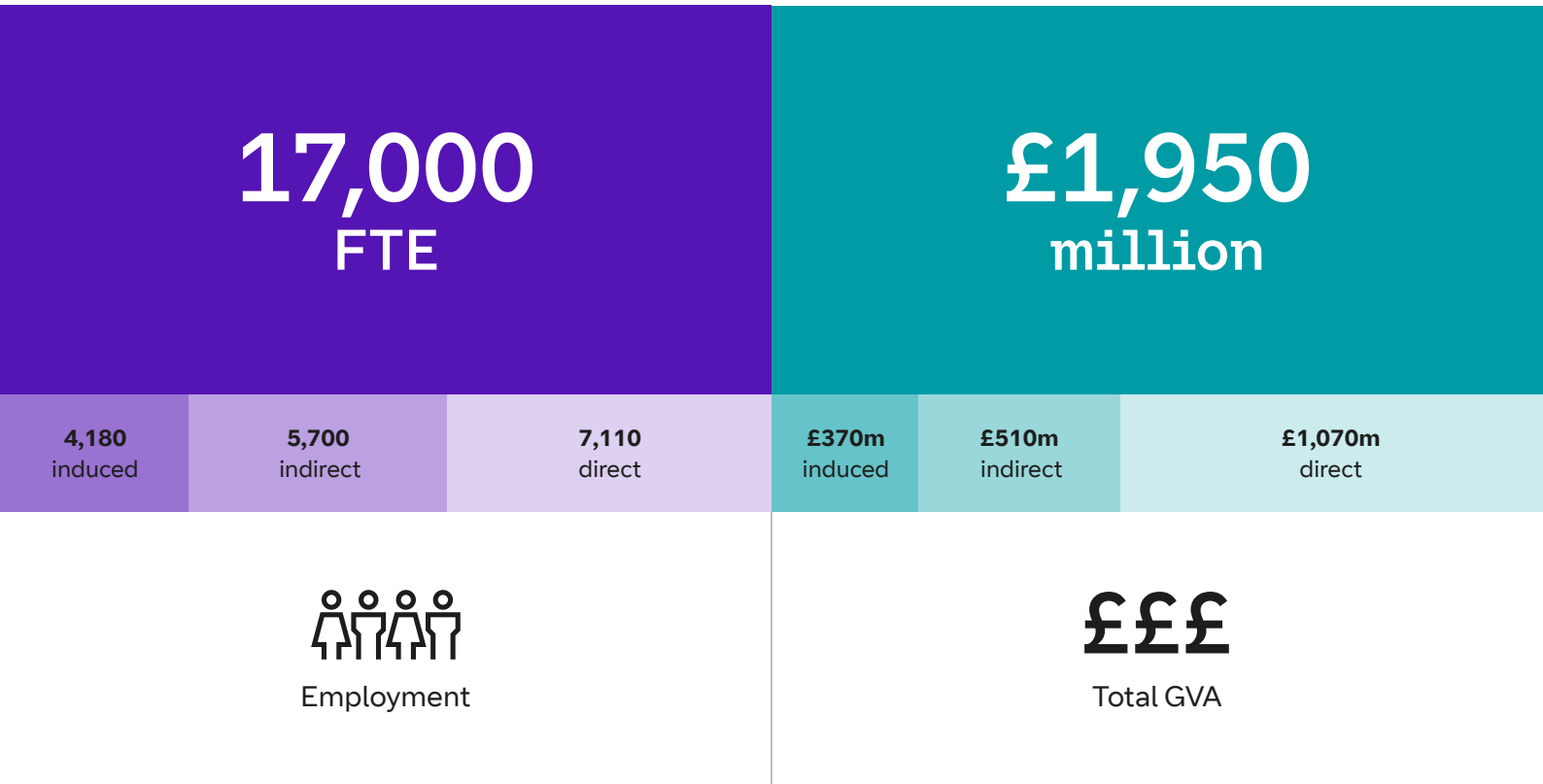


Figure 4-4: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the East of England across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Babergh	20	210	40	5
Basildon	230	330	340	40
Bedford	170	200	270	30
Braintree	60	150	110	10
Breckland	60	120	60	10
Brentwood	50	110	60	10
Broadland	190	160	230	30
Broxbourne	90	120	90	10
Cambridge	160	40	400	40
Castle Point	30	90	30	5
Central Bedfordshire	90	300	160	20
Chelmsford	180	160	280	30
Colchester	210	290	210	30
Dacorum	170	280	500	50
East Cambridgeshire	30	60	40	<5

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
East Hertfordshire	100	190	510	50
East Suffolk	2,840	1,340	2,940	510
Epping Forest	30	110	50	10
Fenland	40	40	50	10
Great Yarmouth	20	70	20	<5
Harlow	80	110	120	10
Hertsmere	130	120	290	40
Huntingdonshire	70	140	320	30
Ipswich	110	770	230	30
King's Lynn and West Norfolk	70	110	70	10
Luton	270	260	500	50
Maldon	30	60	30	<5
Mid Suffolk	30	280	30	5
North Hertfordshire	50	120	50	10
North Norfolk	30	50	160	20
Norwich	180	110	1,660	160
Peterborough	170	120	220	30

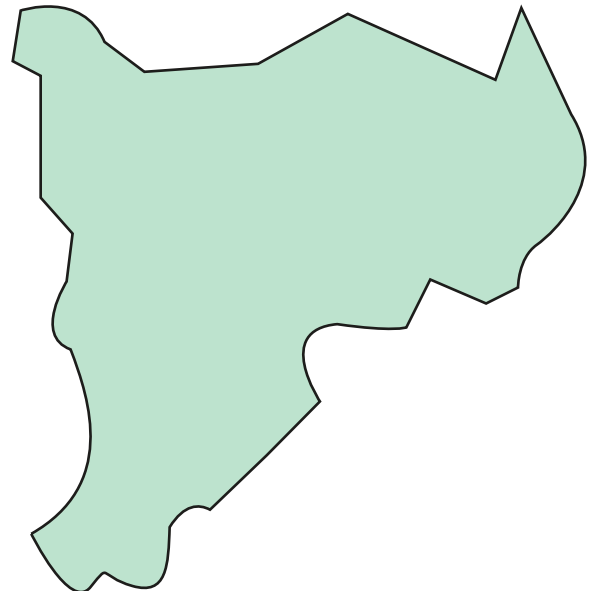
	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Rochford	10	80	10	<5
South Cambridgeshire	30	90	440	40
South Norfolk	50	120	310	30
Southend-on-Sea	60	110	130	10
St Albans	90	190	210	20
Stevenage	40	100	3,080	280
Tendring	50	180	90	10
Three Rivers	10	100	730	70
Thurrock	70	160	110	10
Uttlesford	20	60	80	10
Watford	130	100	660	60
Welwyn Hatfield	450	180	450	70
West Suffolk	190	200	190	20

East Midlands

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Key points – Across the East Midlands in 2023/24

- **3,820 BT Group employees** live in the region (FTE)
- **2,700 BT Group employees** work in the region (FTE)
- **£100 million** total income of BT Group employees working in the region
- **£160 million** spend with suppliers based in the region
- **£550 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 570 employees** working in the private sector, and 1 in every 20 employees working in the IT and Communications sectors
- **£1 in every £390** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 280 employees** working in the private sector and **£1 in every £240** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 2,200 people in the East Midlands region, with a further 500 employed as contractors. These employees earned £100 million in wages and salaries.

Procurement impact

BT Group together spent around £160 million with suppliers based in the East Midlands region in 2023/2024. The largest item was Land transport services and transport services via pipelines, excluding rail transport, as illustrated below.

Total spend **£160 million**

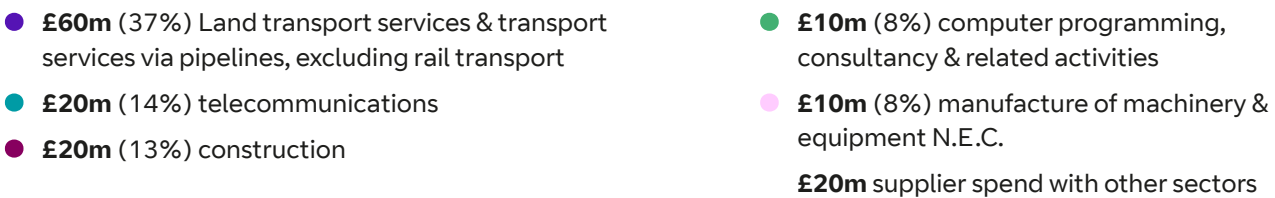


Figure 4-5: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the East Midlands economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the East Midlands = £160 million

1,670
FTE

Employment supported amongst suppliers

£110
million

GVA generated

Figure 4-6: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the East Midlands earned £160 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-7 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the East Midlands = £160 million

1,100
FTE



Employment supported in consumer industries

£100
million

£££

GVA generated

Figure 4-7: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the East Midlands

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the East Midlands. This is summarised in Figure 4-8 below.

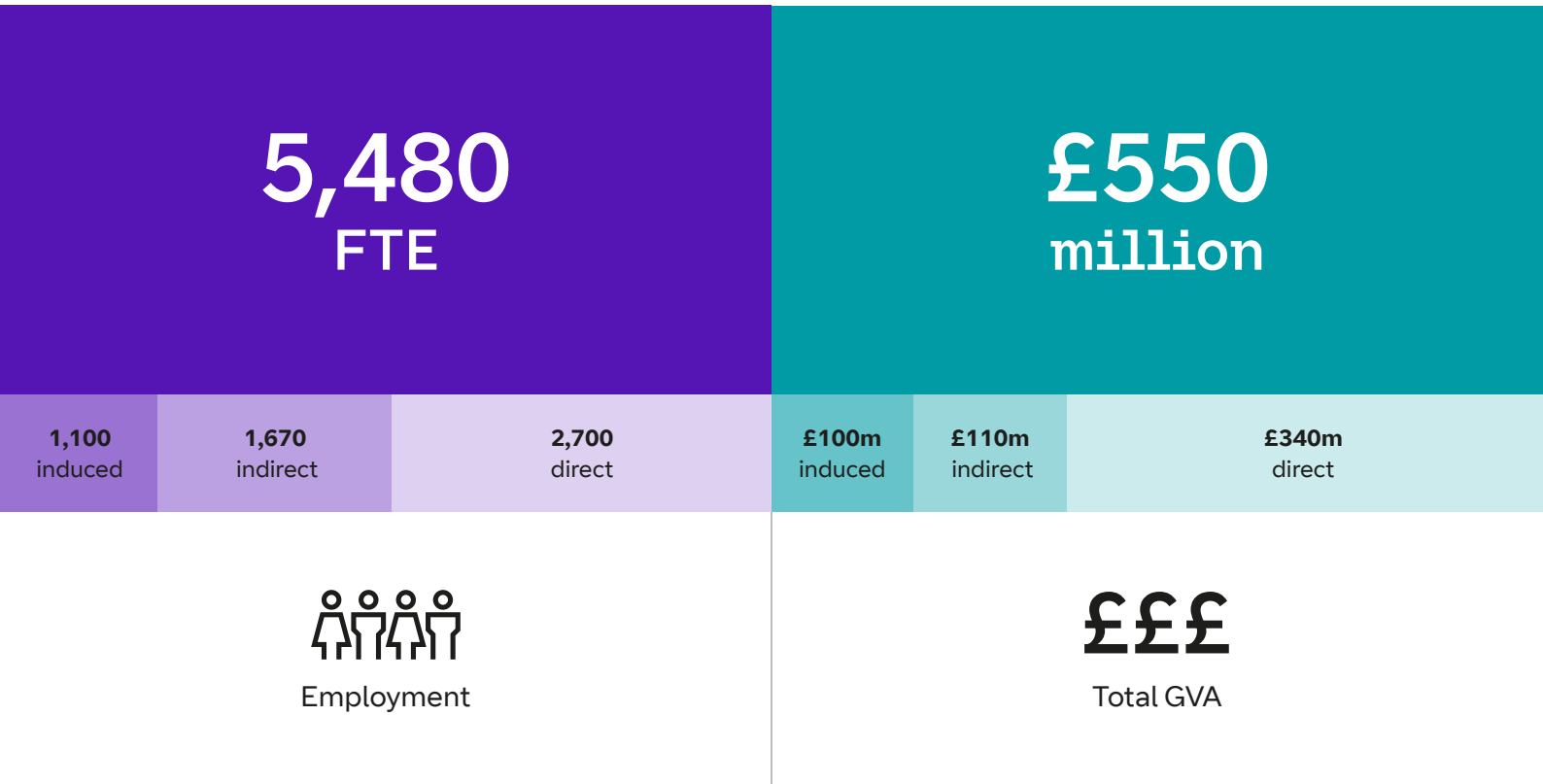


Figure 4-8: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the East Midlands across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Amber Valley	20	90	70	£0
Ashfield	20	100	40	<5
Bassetlaw	30	100	50	10
Blaby	30	100	130	10
Bolsover	90	110	120	£0
Boston	40	40	50	10
Broxtowe	10	50	20	<5
Charnwood	30	120	70	10
Chesterfield	40	170	100	10
Derby	190	130	260	30
Derbyshire Dales	30	30	50	10
East Lindsey	30	50	40	<5
Erewash	10	60	160	10
Gedling	50	110	70	10
Harborough	260	280	350	40
High Peak	40	70	60	10
Hinckley and Bosworth	20	90	90	10
Leicester	250	210	380	40

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Lincoln	310	190	350	40
Mansfield	50	60	60	10
Melton	10	30	10	<5
Newark and Sherwood	20	70	110	10
North East Derbyshire	<5	130	30	<5
North Kesteven	60	160	90	10
North Northamptonshire	40	50	100	10
North West Leicestershire	90	220	320	30
Nottingham	350	140	530	60
Oadby and Wigston	30	90	50	10
Rushcliffe	10	70	110	10
Rutland	10	20	50	10
South Derbyshire	20	80	40	10
South Holland	30	50	40	10
South Kesteven	50	80	60	10
West Lindsey	10	60	20	<5
West Northamptonshire	450	420	1,410	120

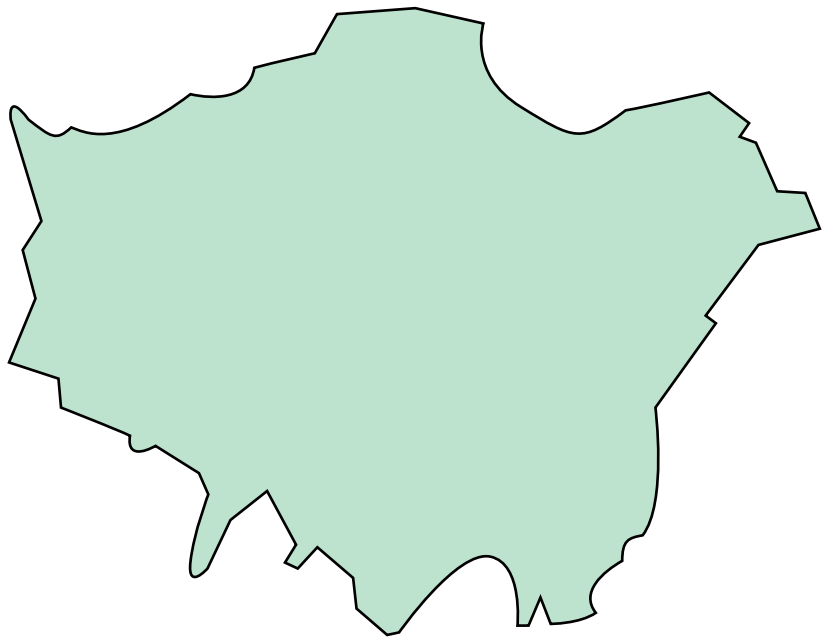
London



4

Key points – Across London in 2023/24

- **8,470 BT Group employees** live in the region (FTE)
- **11,500 BT Group employees** work in the region (FTE)
- **£580 million** total income of BT Group employees working in the region
- **£4,130million** spend with suppliers based in the region
- **£6,230 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 360 employees** working in the private sector, and **1 in every 42 employees** working in the IT and Communications sectors
- **£1 in every £270** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 70 employees** working in the private sector and **£1 in every £90** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 9,130 people in London, with a further 2,400 employed as contractors. These employees earned £580 million in wages and salaries.

Procurement impact

BT Group together spent around £4,130 million with suppliers based in London in 2023/2024. The largest item was telecommunications as illustrated below.

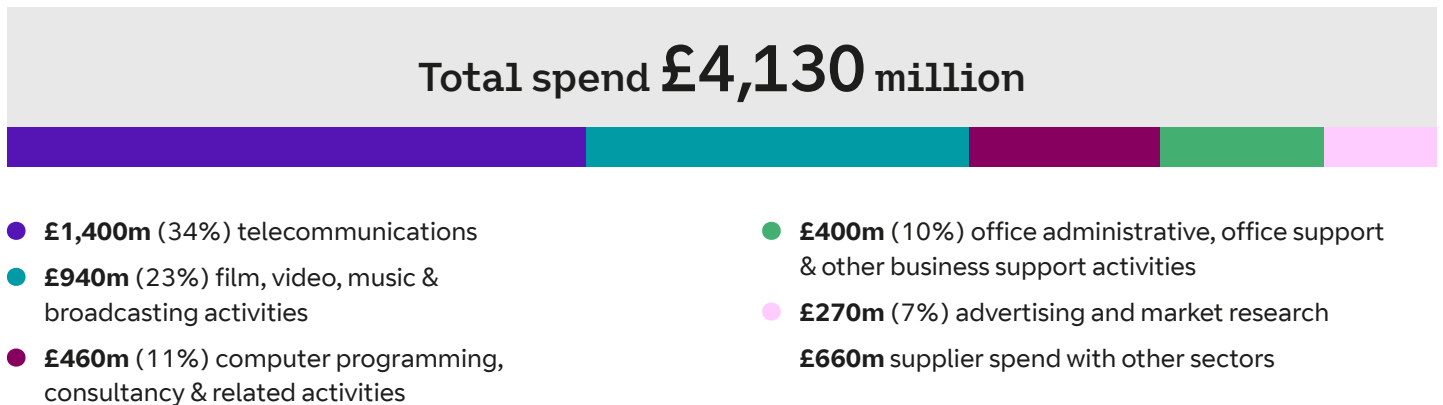


Figure 4-9: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the London economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in London = £4,130 million

43,400
FTE

Employment supported amongst suppliers

£3,060
million

GVA generated

Figure 4-10: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in London earned £380 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-11 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in London = £380 million

12,600
FTE



Employment supported in consumer industries

£1,190
million

£££

GVA generated

Figure 4-11: Induced (wage expenditure) impacts

Source: Hatch



Total impact in London

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in London. This is summarised in Figure 4-12 below.

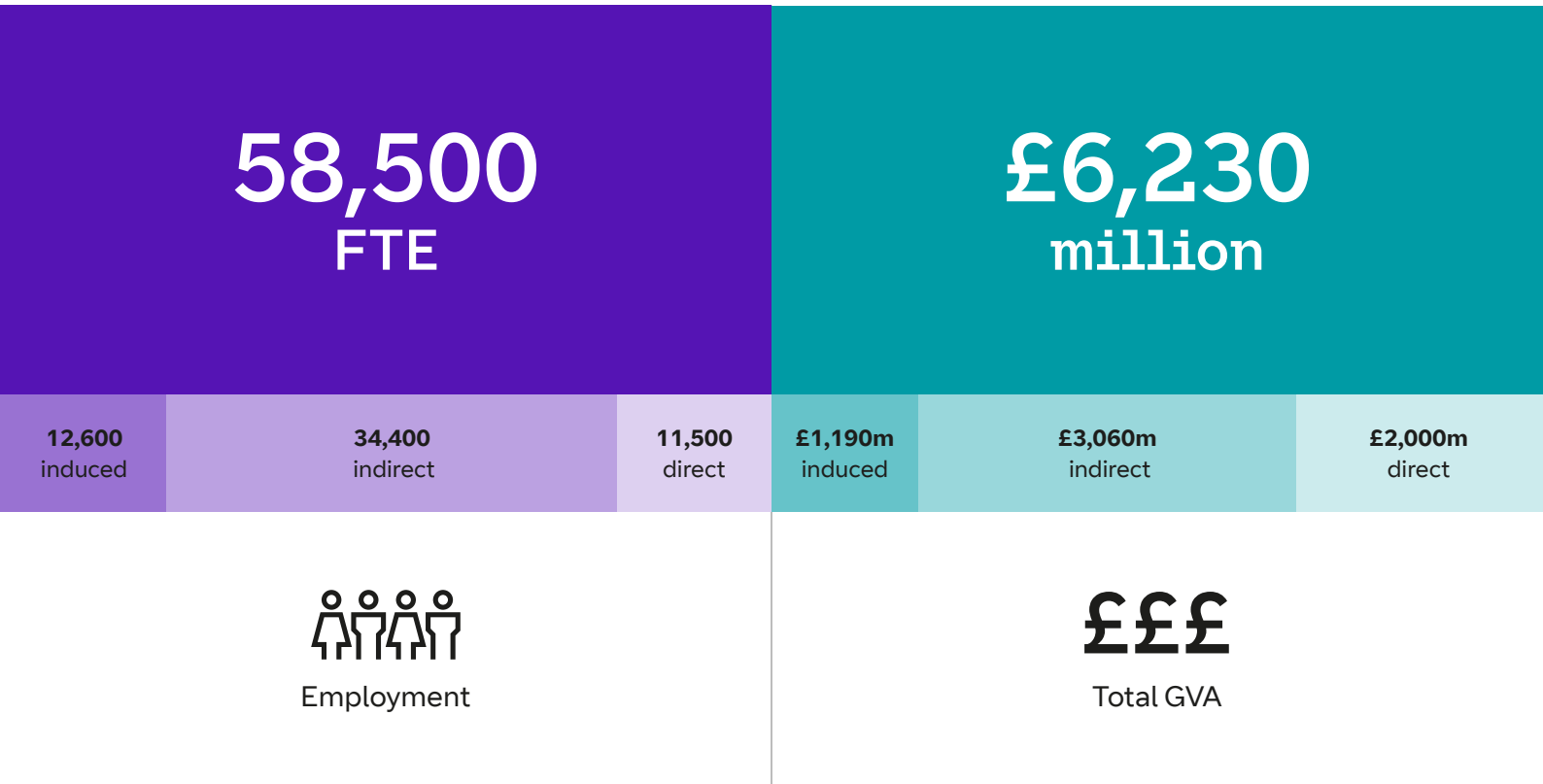


Figure 4-12: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in London local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Barking and Dagenham	90	190	170	20
Barnet	160	240	330	40
Bexley	130	290	280	30
Brent	70	220	1,610	150
Bromley	140	340	340	40
Camden	1,280	625	2,330	290
City of London	950	120	7,330	770
Croydon	220	320	410	50
Ealing	120	225	490	50
Enfield	190	285	370	40
Greenwich	220	220	370	40
Hackney	150	125	470	50
Hammersmith and Fulham	150	65	410	40
Haringey	70	150	160	20
Harrow	90	260	260	30

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Havering	170	320	330	40
Hillingdon	120	265	390	40
Hounslow	40	145	12,200	1,110
Islington	300	200	1,800	180
Kensington and Chelsea	60	30	90	10
Kingston upon Thames	90	110	340	40
Lambeth	110	195	250	30
Lewisham	80	245	330	30
Merton	60	155	240	30
Newham	110	240	250	20
Redbridge	200	255	340	40
Richmond upon Thames	40	80	150	20
Southwark	420	220	4,340	410
Sutton	60	195	180	20
Tower Hamlets	5,000	1,605	6,980	1,220
Waltham Forest	50	225	180	20
Wandsworth	90	180	260	30
Westminster	470	120	14,510	1,330

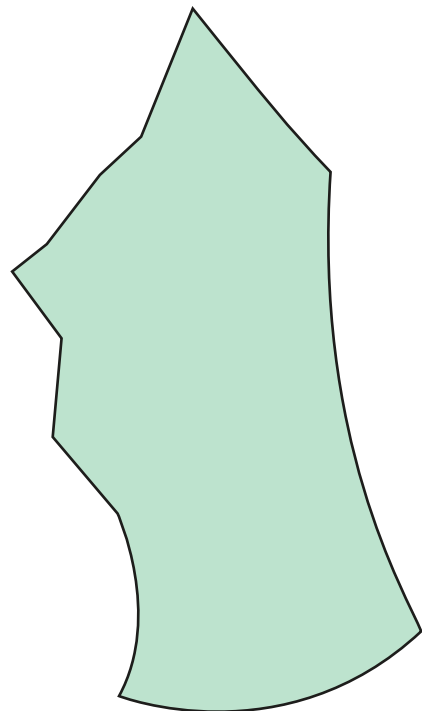
North East



4

Key points – Across the North East in 2023/24

- **7,350 BT Group employees** live in the region (FTE)
- **7,270 BT Group employees** work in the region (FTE)
- **£220 million** total income of BT Group employees working in the region
- **£70 million** spend with suppliers based in the region
- **£970million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 100 employees** working in the private sector, and **1 in every 4 employees** working in the IT and Communications sectors
- **£1 in every £90** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 70 employees** working in the private sector and **£1 in every £60** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 6,550 people in the North East, with a further 720 employed as contractors. These employees earned £220 million in wages and salaries.

Procurement impact

BT Group together spent around £70 million with suppliers based in the North East in 2023/2024. The largest item was construction, as illustrated below.

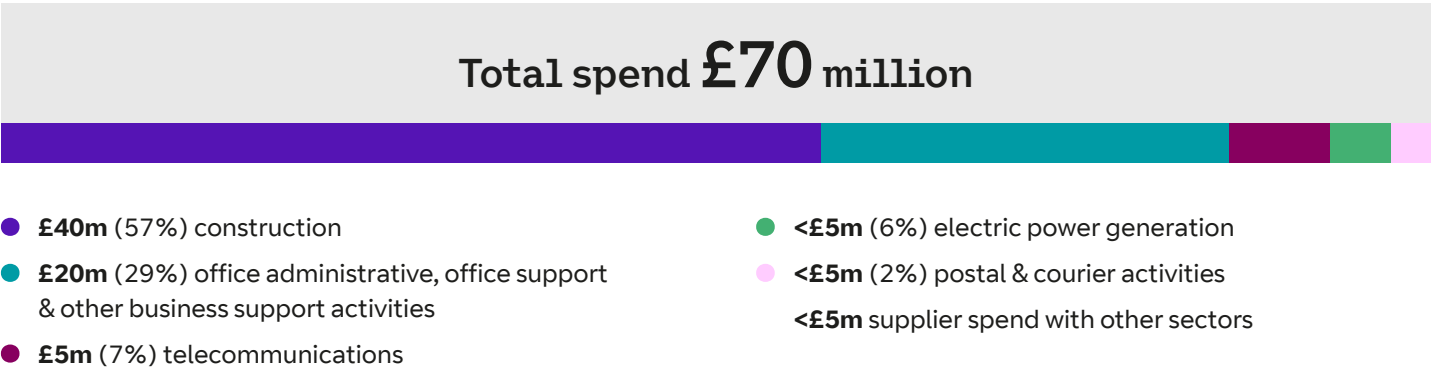


Figure 4- 13: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group’s spend with suppliers results in significant benefits for the North East economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the North East = £70 million

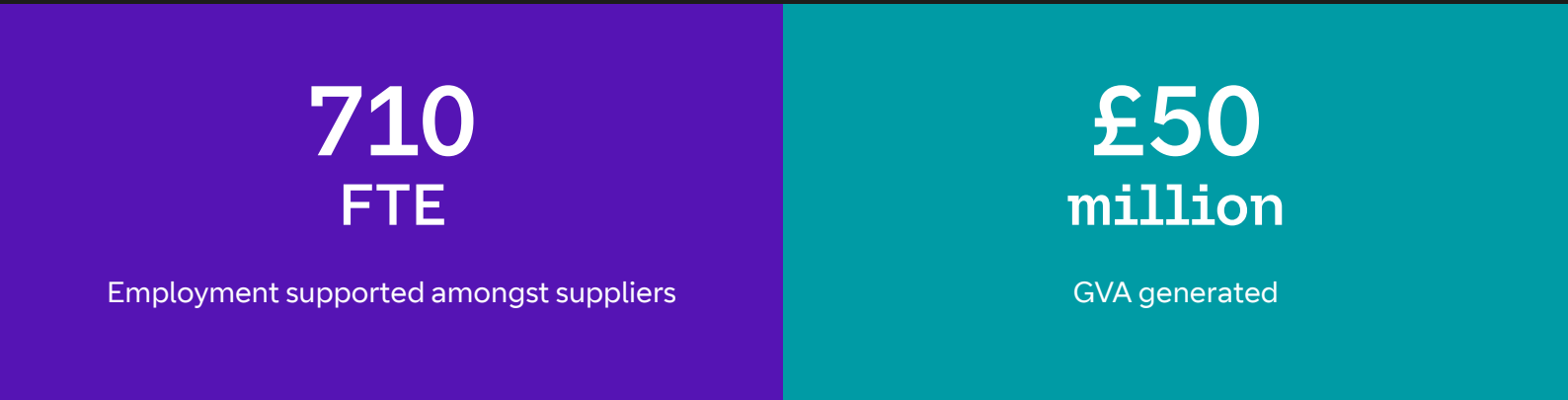


Figure 4- 14: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the North East earned £230 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-15 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the North East = £230 million

1,770
FTE



Employment supported in consumer industries

£180
million

£££

GVA generated

Figure 4-15: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the North East

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the North East. This is summarised in Figure 4- 16 below.

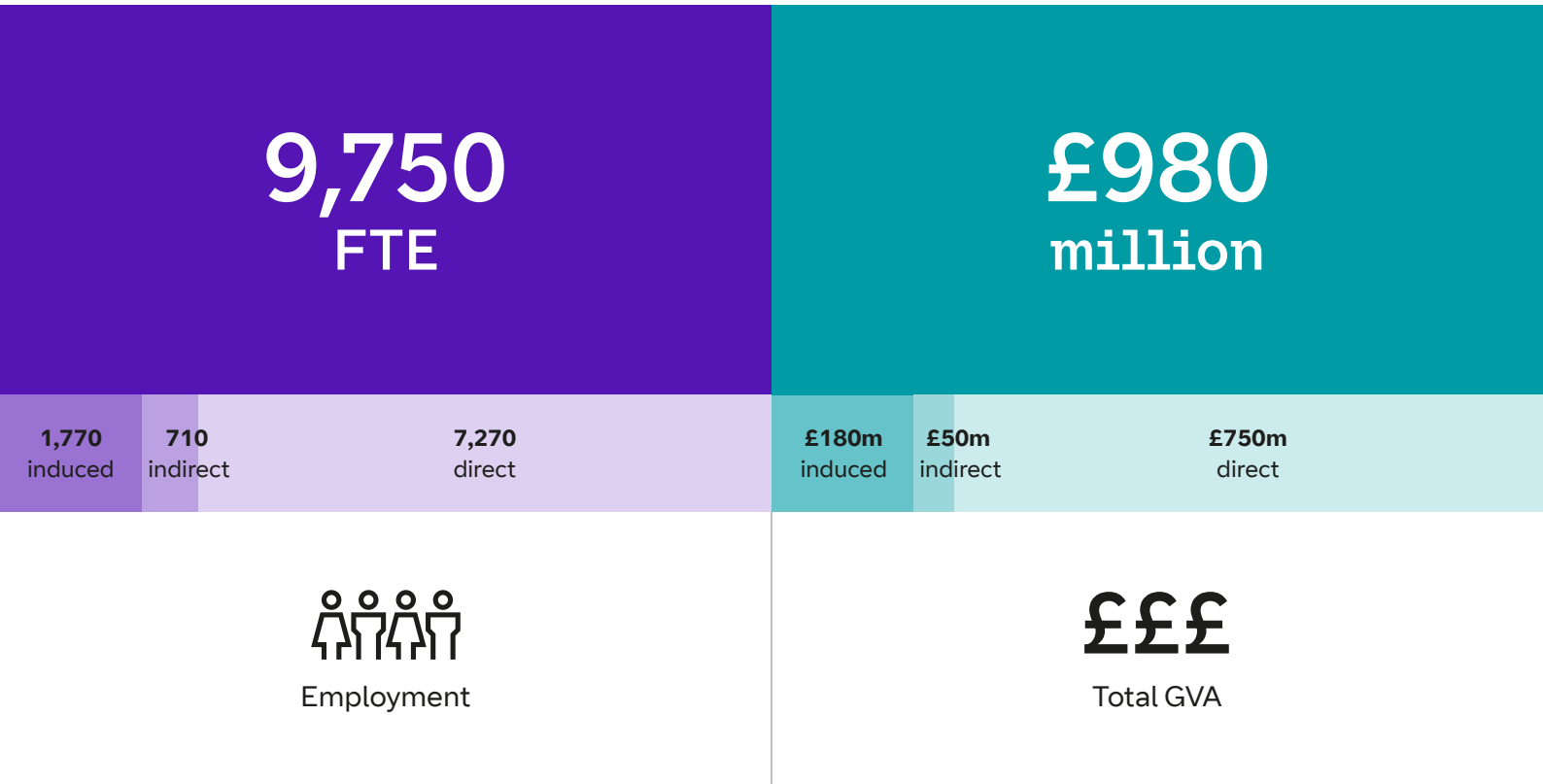


Figure 4- 16: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the North East across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
County Durham	380	1,160	710	70
Darlington	2,070	1,100	2,300	220
Gateshead	340	510	470	50
Hartlepool	30	80	50	5
Middlesbrough	100	230	150	20
Newcastle upon Tyne	350	730	520	70
North Tyneside	3,000	1,330	3,550	340
Northumberland	130	740	300	30
Redcar and Cleveland	10	130	50	10
South Tyneside	10	360	110	10
Stockton-on-Tees	100	320	610	50
Sunderland	750	660	920	100

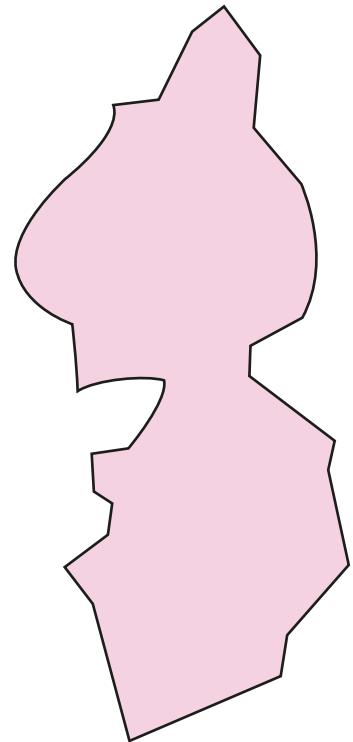
North West



4

Key points – Across the North West in 2023/24

- **9,290 BT Group employees** live in the region (FTE)
- **9,520 BT Group employees** work in the region (FTE)
- **£360 million** total income of BT Group employees working in the region
- **£560 million** spend with suppliers based in the region
- **£2,020 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 250 employees** working in the private sector, and **1 in every 12 employees** working in the IT and Communications sectors
- **£1 in every £180** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 130 employees** working in the private sector and **£1 in every £110** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 7,940 people in the North West, with a further 1,580 employed as contractors. These employees earned £350 million in wages and salaries.

Procurement impact

BT Group together spent around £560 million with suppliers based in the North West in 2023/24. The largest item was telecommunications, as illustrated below.

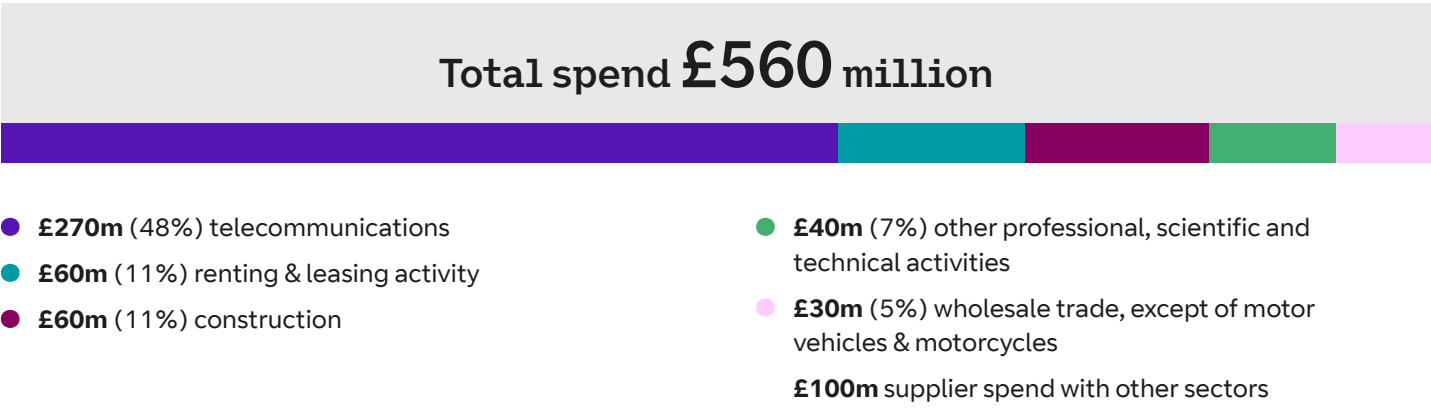


Figure 4-17: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group’s spend with suppliers results in significant benefits for the North West economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the North West = £560 million

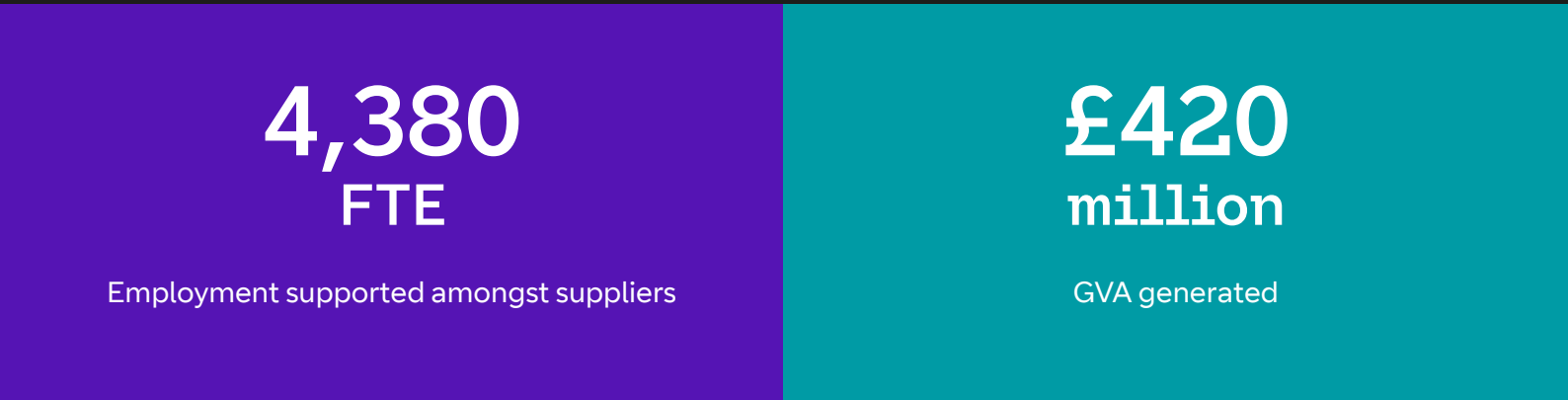


Figure 4-18: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the North West earned £350 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-19 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the North West = £350 million

4,100
FTE



Employment supported in consumer industries

£380
million

£££

GVA generated

Figure 4-19: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the North West

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the North West. This is summarised in Figure 4-20 below.

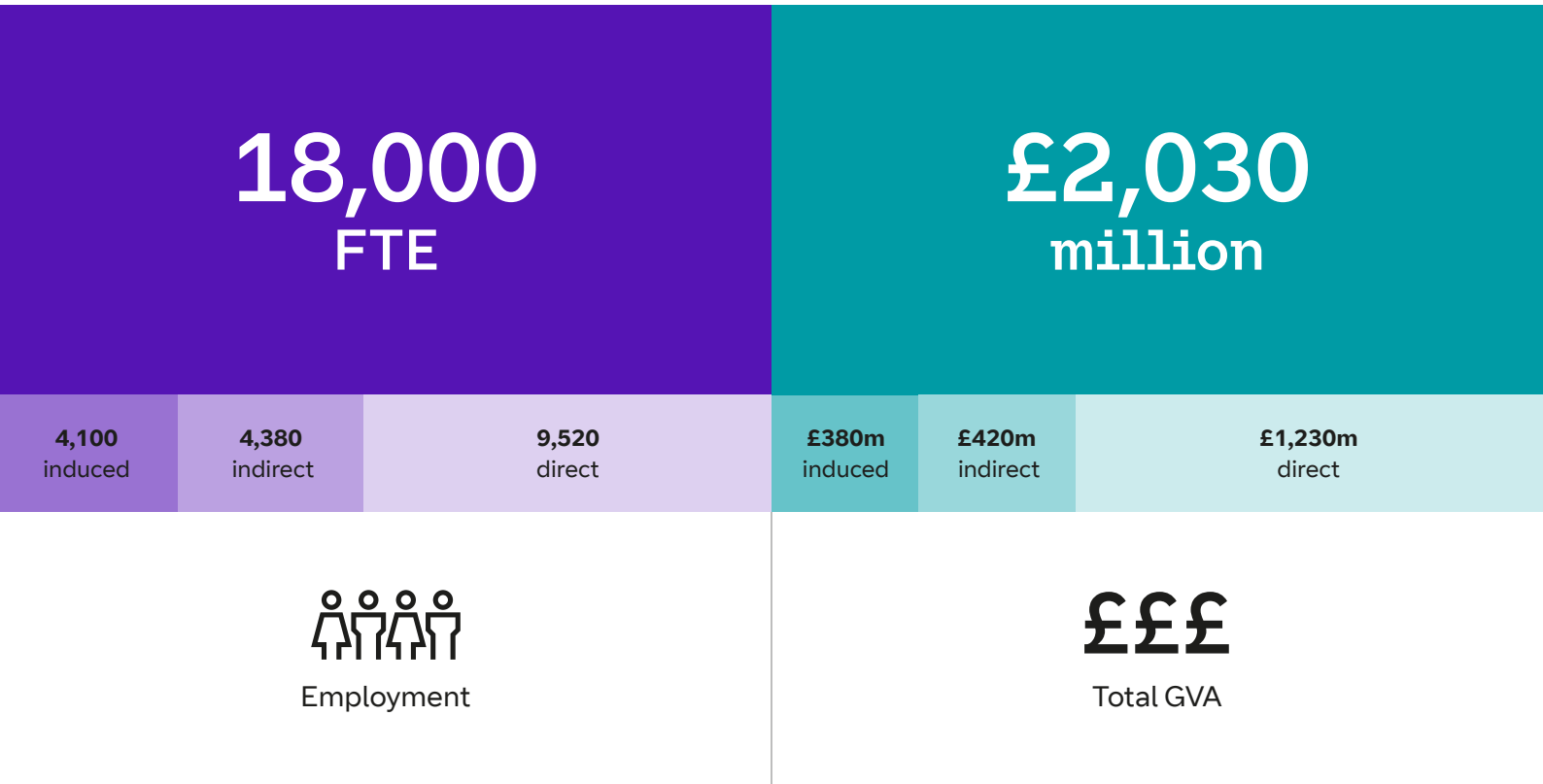


Figure 4-20: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the North West across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Blackburn with Darwen	310	400	480	50
Blackpool	40	80	70	10
Bolton	100	230	190	20
Burnley	30	100	180	20
Bury	60	170	130	10
Cheshire East	120	230	400	40
Cheshire West and Chester	290	330	450	50
Chorley	50	120	102	10
Cumberland	160	200	250	30
Fylde	30	40	81	10
Halton	60	200	520	50
Hyndburn	400	210	480	50
Knowsley	70	300	1,950	190
Lancaster	330	320	410	40
Liverpool	1,600	860	1,880	220
Manchester	1,750	420	2,650	400

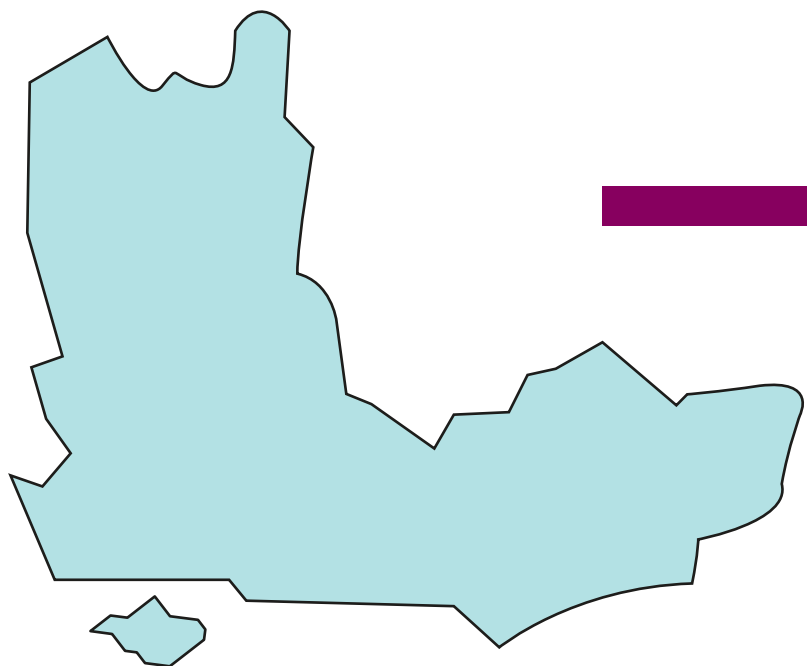
	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Oldham	70	190	140	20
Pendle	10	80	40	<5
Preston	340	220	500	60
Ribble Valley	30	60	50	10
Rochdale	120	190	190	20
Rossendale	10	90	40	<5
Salford	610	380	1,250	150
Sefton	90	310	200	20
South Ribble	30	120	70	10
St. Helens	50	250	160	20
Stockport	680	620	1,360	150
Tameside	150	320	270	30
Trafford	110	200	250	30
Warrington	770	90	1,660	160
West Lancashire	100	160	190	20
Westmorland and Furness	150	120	200	20
Wigan	610	840	850	90
Wirral	150	350	290	30
Wyre	40	100	70	10

South East



Key points – Across the South East in 2023/24

- **8,910 BT Group employees** live in the region (FTE)
- **7,220 BT Group employees** work in the region (FTE)
- **£270 million** total income of BT Group employees working in the region
- **£2,420 million** spend with suppliers based in the region
- **£3,500 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 430 employees** working in the private sector, and **1 in every 34 employees** working in the IT and Communications sectors
- **£1 in every £370** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 90 employees** working in the private sector and **£1 in every £100** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 4,660 people in the South East, with a further 2,560 employed as contractors. These employees earned £270 million in wages and salaries.

Procurement impact

BT Group together spent around £2,420 million with suppliers based in the South East in 2023/2024. The largest item was telecommunications as illustrated below.

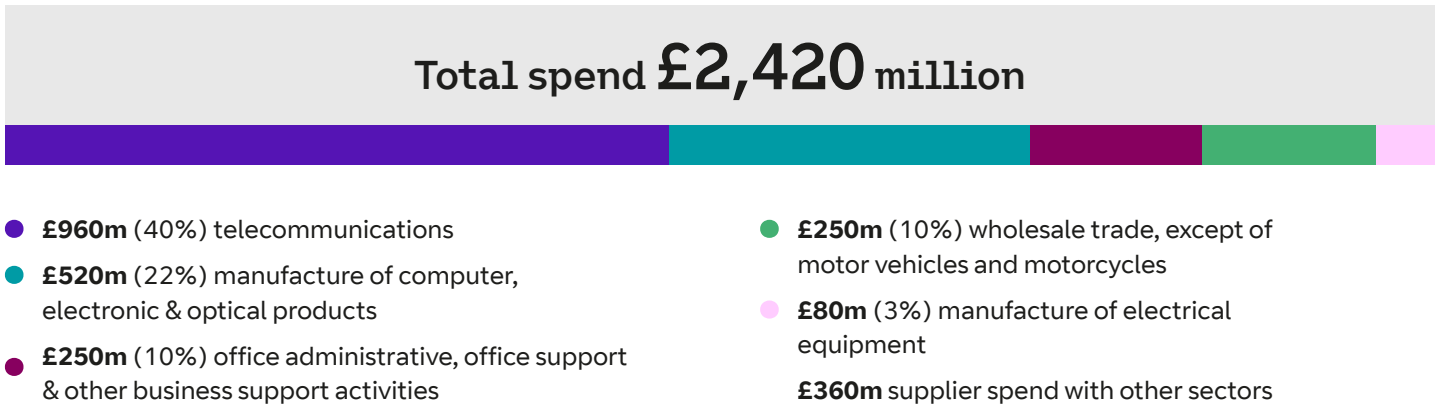


Figure 4-21: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the South East economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the South East = £2,420 million

18,200
FTE

Employment supported amongst suppliers

£1,860
million

GVA generated

Figure 4-22: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the South East earned £390 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-23 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the South East = £390 million

8,550
FTE



Employment supported in consumer industries

£1,340
million

£££

GVA generated

Figure 4-23: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the South East

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the South East. This is summarised in Figure 4-24 below.

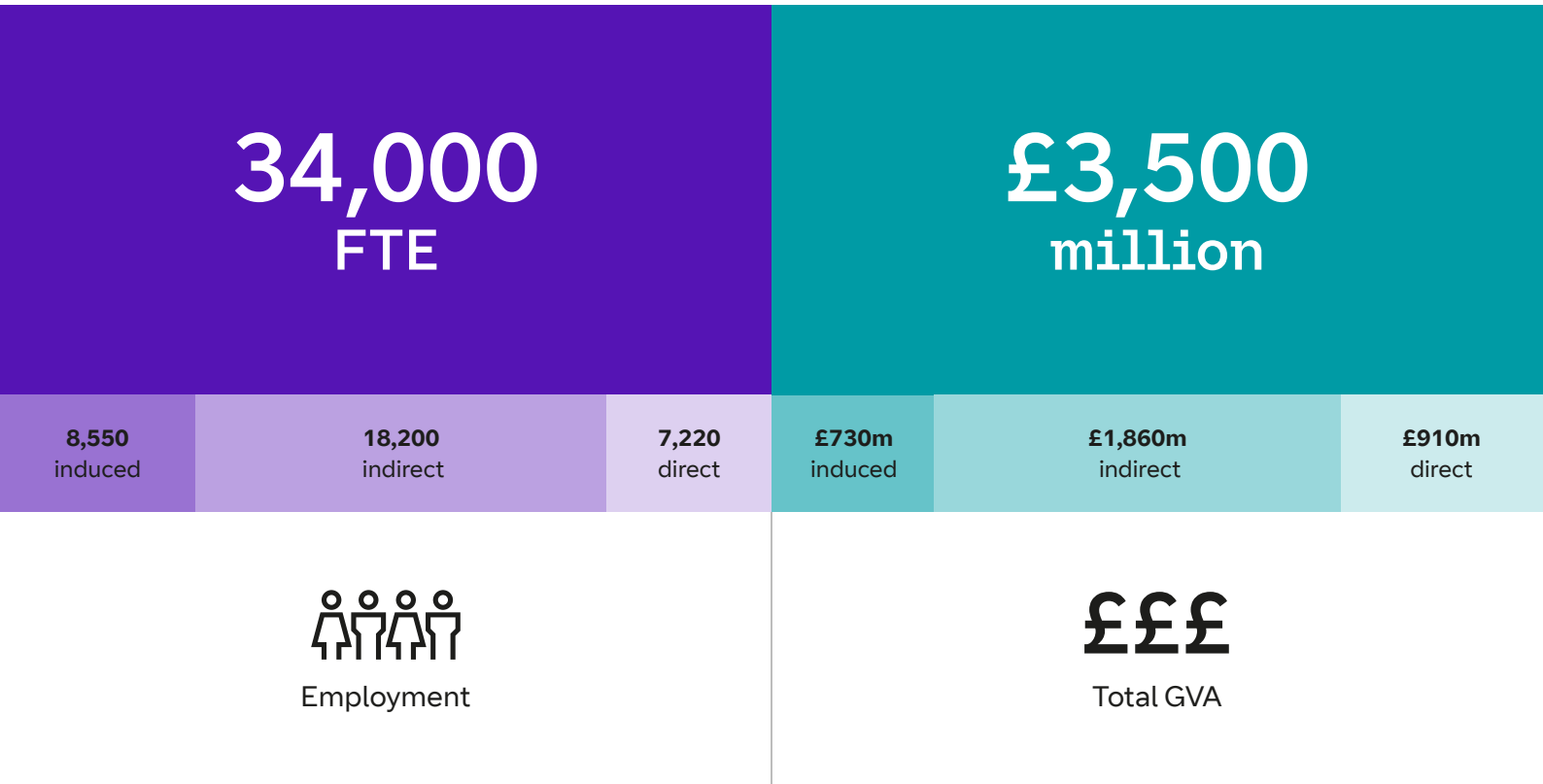


Figure 4-24: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the South East across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Adur	<5	40	30	<5
Arun	40	110	70	10
Ashford	50	120	320	30
Basingstoke and Deane	100	120	600	60
Bracknell Forest	60	110	340	40
Brighton and Hove	200	110	280	30
Buckinghamshire	300	480	1,000	100
Canterbury	170	130	2,960	300
Cherwell	80	100	160	20
Chichester	50	70	100	10
Crawley	170	140	250	30
Dartford	60	140	120	10
Dover	30	90	50	5
East Hampshire	40	70	180	20

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Eastbourne	50	70	70	10
Eastleigh	40	90	1,050	110
Elmbridge	100	80	200	20
Epsom and Ewell	20	60	50	5
Fareham	250	300	330	30
Folkestone and Hythe	60	70	90	10
Gosport	<5	30	10	<5
Gravesham	20	80	50	<5
Guildford	70	80	280	30
Hart	470	500	690	70
Hastings	90	90	120	10
Havant	30	70	60	10
Horsham	50	100	110	10
Isle of Wight	40	50	70	10
Lewes	30	60	60	10
Maidstone	100	170	300	30
Medway	150	230	250	30
Mid Sussex	60	110	140	10

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Milton Keynes	1,070	1,110	1,710	180
Mole Valley	30	50	60	10
New Forest	100	130	210	20
Oxford	110	40	130	20
Portsmouth	220	80	660	70
Reading	540	320	2,580	270
Reigate and Banstead	40	110	2,110	210
Rother	20	60	40	<5
Runnymede	430	470	5,730	580
Rushmoor	120	90	190	20
Sevenoaks	60	110	120	10
Slough	60	110	3,200	320
South Oxfordshire	30	80	70	10
Southampton	130	140	320	40
Spelthorne	90	90	350	40
Surrey Heath	100	150	150	20
Swale	40	100	80	10
Tandridge	30	80	70	10

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Test Valley	140	90	260	30
Thanet	50	90	70	10
Tonbridge and Malling	160	200	270	30
Tunbridge Wells	130	110	180	20
Vale of White Horse	30	60	60	10
Waverley	60	80	220	20
Wealden	60	150	120	10
West Berkshire	60	170	1,430	140
West Oxfordshire	40	60	60	10
Winchester	40	50	190	20
Windsor and Maidenhead	60	120	870	90
Woking	10	60	130	10
Wokingham	120	250	1,860	190
Worthing	60	80	90	10

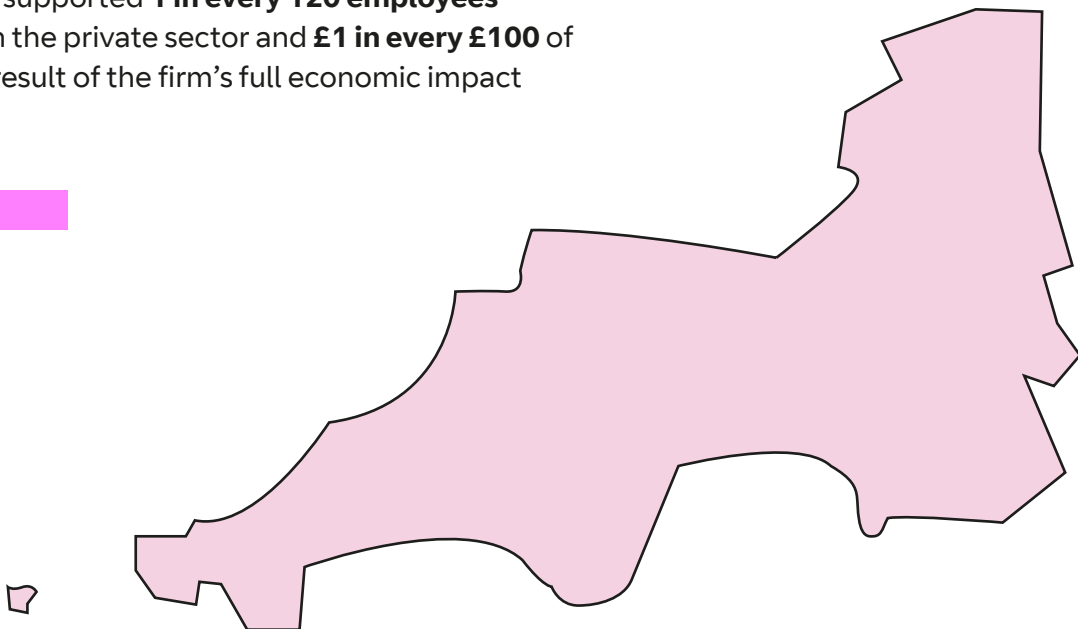
South West



4

Key points – Across the South West in 2023/24

- **7,660 BT Group employees** live in the region (FTE)
- **8,160 BT Group employees** work in the region (FTE)
- **£350 million** total income of BT Group employees working in the region
- **£410 million** spend with suppliers based in the region
- **£1,810 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 220 employees** working in the private sector, and **1 in every 10 employees** working in the IT and Communications sectors
- **£1 in every £150** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 120 employees** working in the private sector and **£1 in every £100** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 7,420 people in the South West, with a further 730 employed as contractors. These employees earned £350 million in wages and salaries.

Procurement impact

BT Group together spent around £410 million with suppliers based in the South West in 2023/2024. The largest item was telecommunications as illustrated below.

Total spend **£410 million**



Figure 4-25: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the South West economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the South West = £410 million

3,150
FTE

Employment supported amongst suppliers

£290
million

GVA generated

Figure 4-26: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the South West earned £320 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-27 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the South West = £320 million

3,390
FTE



Employment supported in consumer industries

£330
million

£££

GVA generated

Figure 4-27: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the South West

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the South West. This is summarised in Figure 4-28 below.

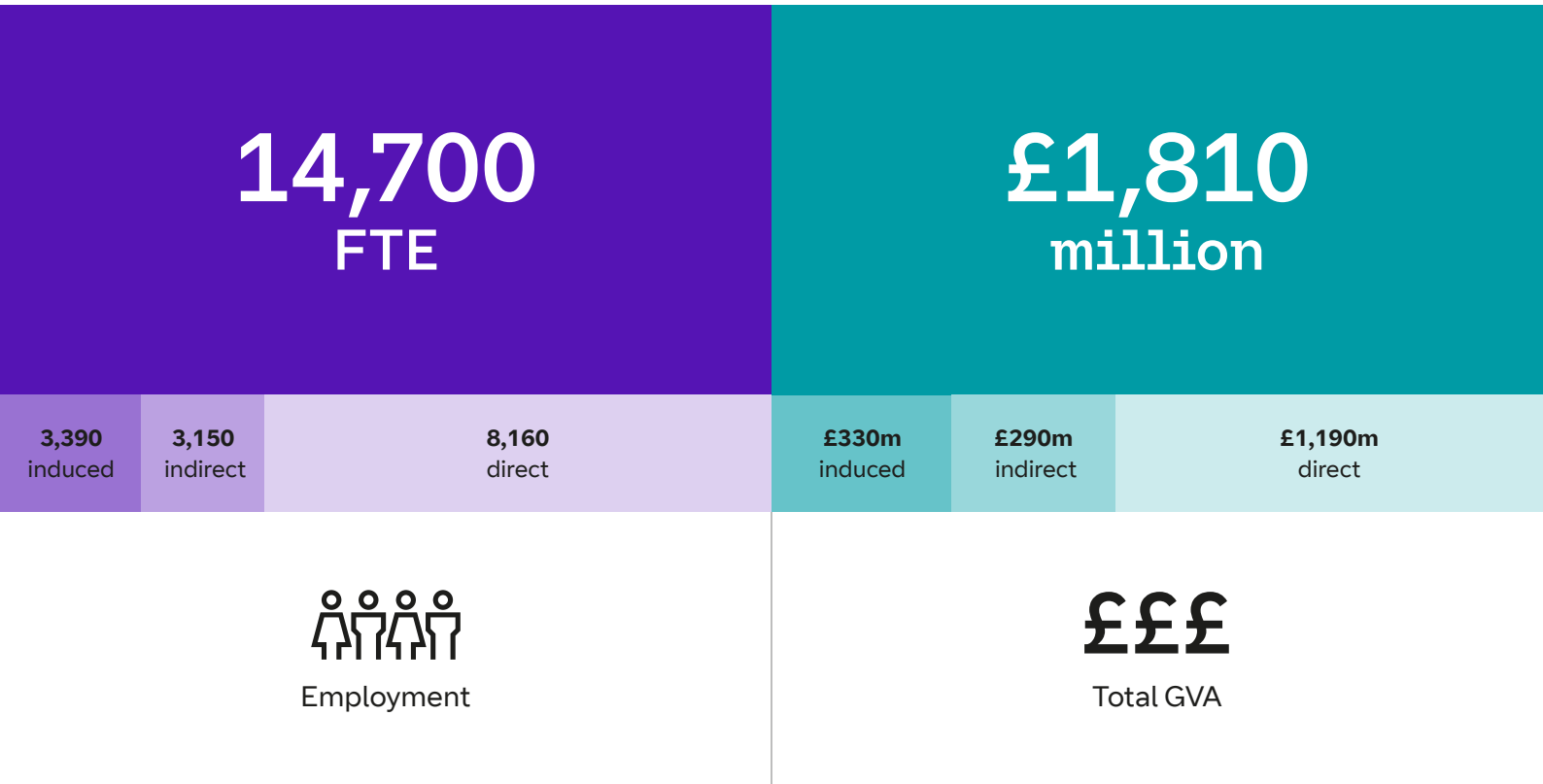


Figure 4-28: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the South West across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Bath and North East Somerset	100	210	230	30
Bournemouth, Christchurch and Poole	180	210	430	50
Bristol, City of	3,340	1,260	3,850	660
Cheltenham	190	100	410	50
Cornwall	520	590	690	80
Cotswold	40	40	180	20
Dorset	180	230	300	40
East Devon	60	160	130	20
Exeter	660	290	760	90
Forest of Dean	20	90	70	10
Gloucester	130	140	210	20

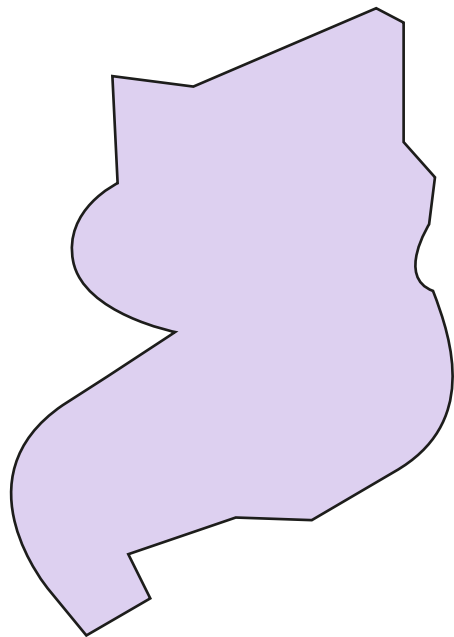
	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Mid Devon	40	80	60	10
North Devon	100	110	140	20
North Somerset	80	340	240	30
Plymouth	270	980	540	60
Somerset	370	500	560	70
South Gloucestershire	320	900	2,100	200
South Hams	830	100	860	70
Stroud	20	120	80	10
Swindon	140	280	1,220	120
Teignbridge	50	160	110	10
Tewkesbury	20	90	90	10
Torbay	70	110	100	10
Torridge	30	40	40	5
West Devon	50	60	70	10
Wiltshire	350	470	1,280	140
Isles of Scilly	<5	<5	<5	<5

West Midlands

4

Key points – Across the West Midlands in 2023/24

- **8,880 BT Group employees** live in the region (FTE)
- **9,530 BT Group employees** work in the region (FTE)
- **£380 million** total income of BT Group employees working in the region
- **£450 million** spend with suppliers based in the region
- **£1,820 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 200 employees** working in the private sector, and **1 in every 8 employees** working in the IT and Communications sectors
- **£1 in every £130** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 110 employees** working in the private sector and **£1 in every £90** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 6,230 people in the West Midlands, with a further 2,910 employed as contractors. These employees earned £380 million in wages and salaries.

Procurement impact

BT Group together spent around £450 million with suppliers based in the West Midlands in 2023/2024. The largest item wholesale/retail/repair of motor vehicles & motorcycles as illustrated as below.

Total spend **£450 million**

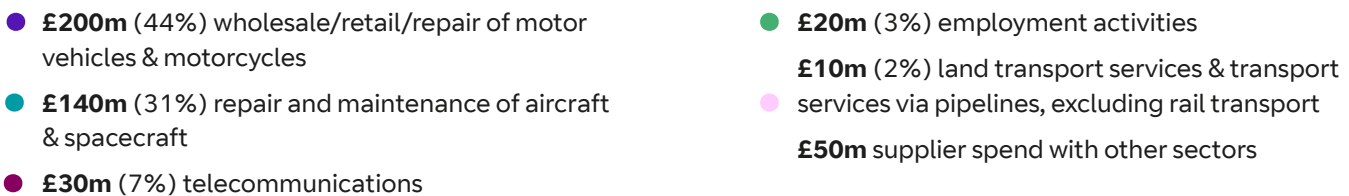


Figure 4-29: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the West Midlands economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in the West Midlands = £450 million

4,360
FTE

Employment supported amongst suppliers

£260
million

GVA generated

Figure 4-30: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in the West Midlands earned £350 million in 2023/24 in turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-31 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in the West Midlands = £350 million

3,880
FTE



Employment supported in consumer industries

£350
million

£££

GVA generated

Figure 4-31: Induced (wage expenditure) impacts

Source: Hatch



Total impact in the West Midlands

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in the West Midlands. This is summarised in Figure 4-32 below.

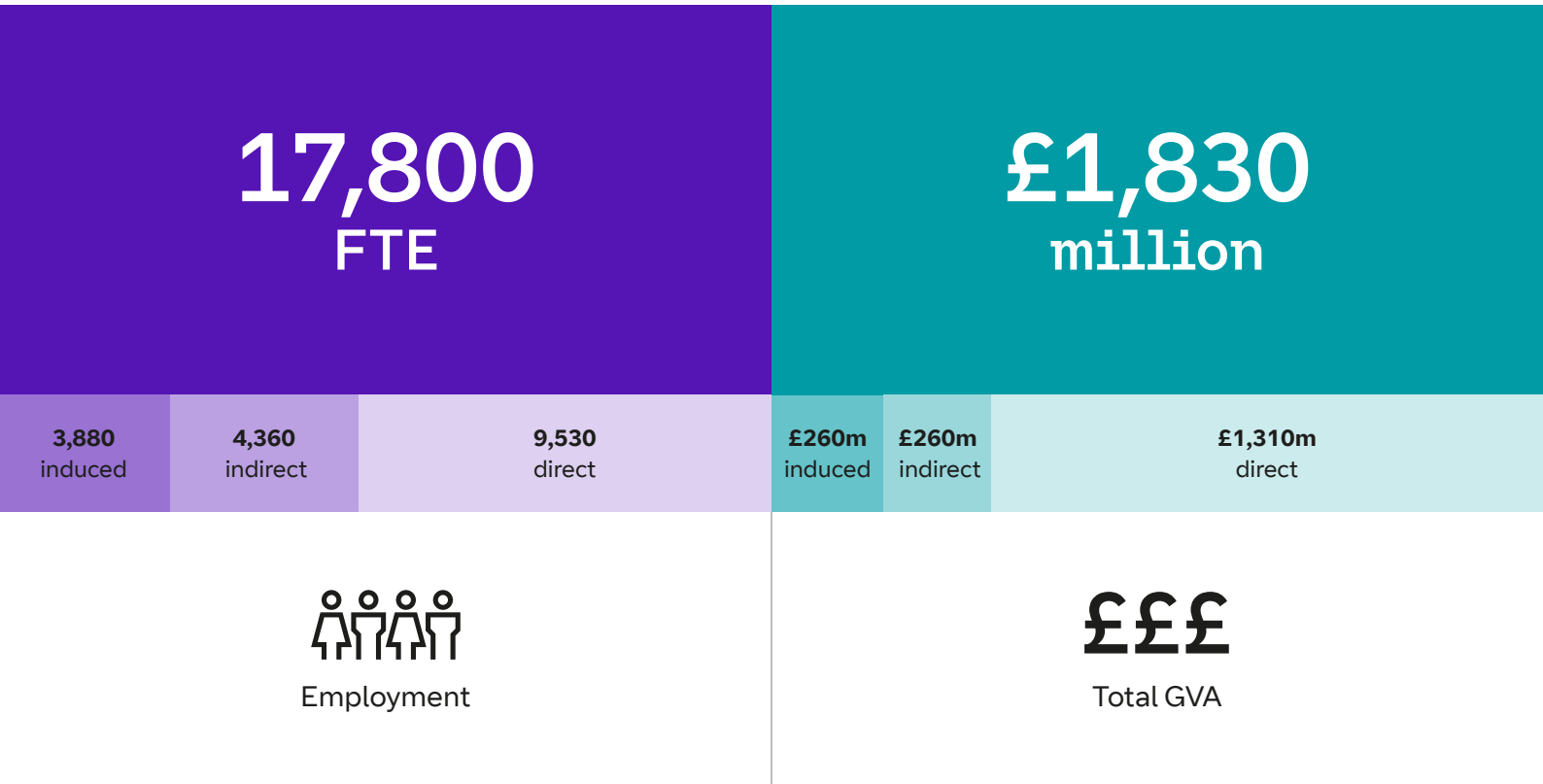


Figure 4-32: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in the West Midlands across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Birmingham	5,430	2,660	6,420	880
Bromsgrove	20	120	80	10
Cannock Chase	30	100	90	10
Coventry	280	340	430	50
Dudley	950	1,150	1,310	130
East Staffordshire	80	80	110	10
Herefordshire, County of	210	230	360	40
Lichfield	20	90	70	10
Malvern Hills	20	70	50	5
Newcastle- under-Lyme	50	90	80	10
North Warwickshire	10	60	40	<5
Nuneaton and Bedworth	80	180	160	10
Redditch	30	80	70	10

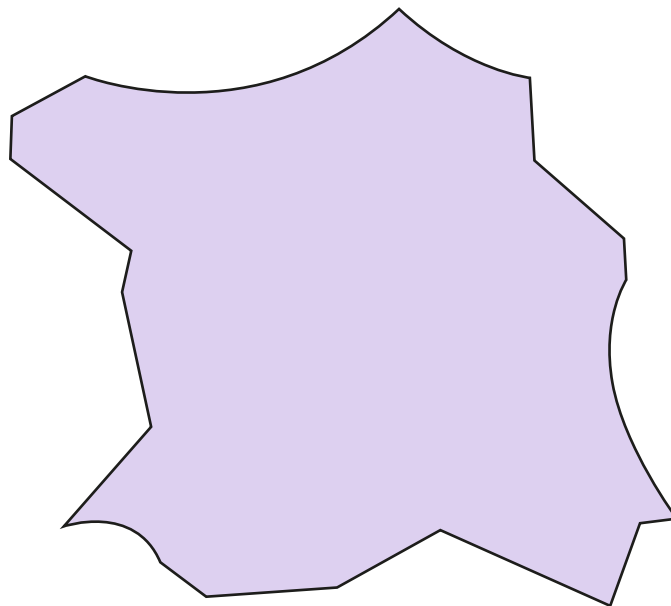
	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Rugby	50	100	170	10
Sandwell	200	550	540	40
Shropshire	410	510	600	70
Solihull	150	350	2,740	180
South Staffordshire	10	110	50	<5
Stafford	100	140	160	20
Staffordshire Moorlands	10	70	40	<5
Stoke-on-Trent	340	290	620	60
Stratford-on-Avon	30	90	110	10
Tamworth	40	80	60	10
Telford and Wrekin	130	180	280	30
Walsall	380	500	540	50
Warwick	80	100	1,800	120
Wolverhampton	150	300	320	30
Worcester	130	100	170	20
Wychavon	40	90	200	20
Wyre Forest	60	90	90	10

Yorkshire and the Humber



Key points – Across Yorkshire and the Humber in 2023/24

- **6,220 BT Group employees** live in the region (FTE)
- **6,570 BT Group employees** work in the region (FTE)
- **£240 million** total income of BT Group employees working in the region
- **£390 million** spend with suppliers based in the region
- **£1,330 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 260 employees** working in the private sector, and **1 in every 10 employees** working in the IT and Communications sectors
- **£1 in every £180** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 140 employees** working in the private sector and **£1 in every £110** of GVA as a result of the firm's full economic impact



Regional impacts

Direct impact

BT Group directly employs a total of 5,640 people in Yorkshire and the Humber, with a further 930 employed as contractors. These employees earned £240 million in wages and salaries.

Procurement impact

BT Group together spent around £390 million with suppliers based in Yorkshire and the Humber in 2023/2024. The largest item was the electric power generation, transmission and distribution sector, as illustrated below.

Total spend **£390 million**



Figure 4-33: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the Yorkshire and the Humber economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in Yorkshire and the Humber = £390 million

2,810
FTE

Employment supported amongst suppliers

£250
million

GVA generated

Figure 4-34: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in Yorkshire and the Humber earned £230 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the region.

Figure 4-35 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in Yorkshire and the Humber = £230 million

2,590
FTE



Employment supported in consumer industries

£250
million

£££

GVA generated

Figure 4-35: Induced (wage expenditure) impacts

Source: Hatch



Total impact in Yorkshire and the Humber

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in Yorkshire and the Humber. This is summarised in Figure 4-36 below.

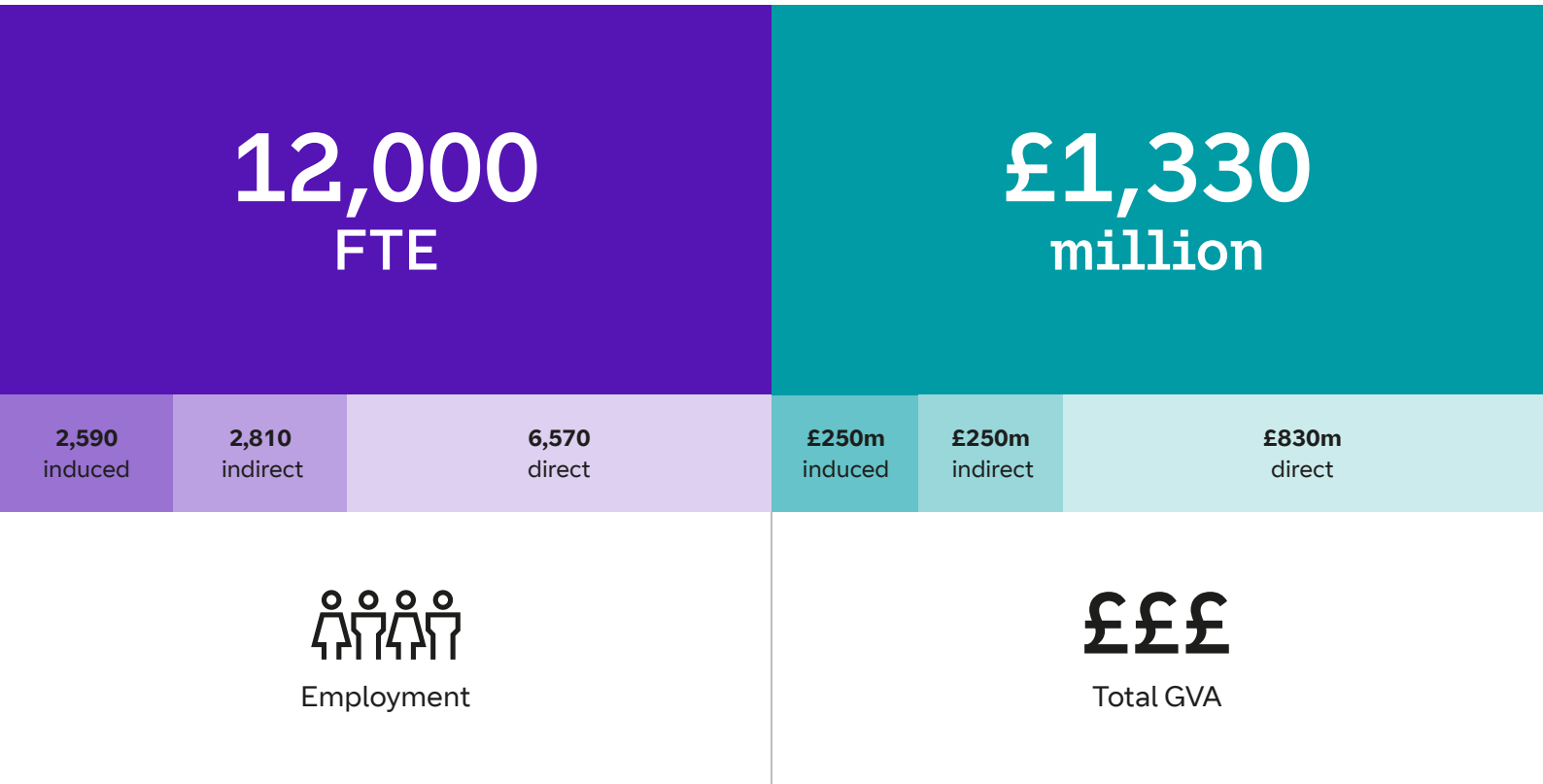


Figure 4-36: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in Yorkshire and the Humber across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Barnsley	250	430	370	40
Bradford	220	370	360	40
Calderdale	50	120	90	10
Doncaster	870	870	1,090	100
East Riding of Yorkshire	70	150	150	20
Kingston upon Hull, City of	260	270	580	60
Kirklees	120	330	240	30
Leeds	2,070	1,100	2,580	350
North East Lincolnshire	90	80	110	10
North Lincolnshire	30	90	70	10
North Yorkshire	210	430	2,690	250
Rotherham	150	410	290	30
Sheffield	1,840	1,080	2,180	260
Wakefield	130	310	300	30
York	220	200	890	90

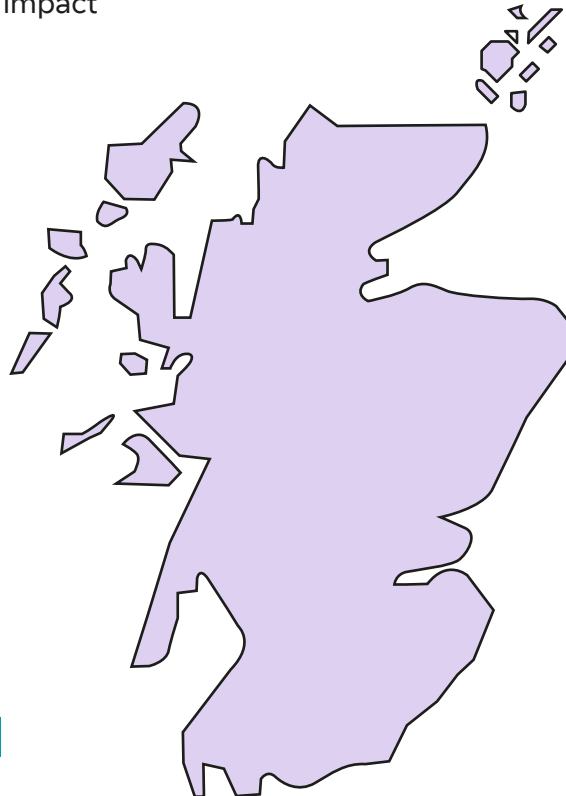
Scotland



4

Key points – Across Scotland in 2023/24

- **7,700 BT Group employees** live in the nation (FTE)
- **7,630 BT Group employees** work in the nation (FTE)
- **£280 million** total income of BT Group employees working in the nation
- **£180 million** spend with suppliers based in the nation
- **£1,310 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 210 employees** working in the private sector, and **1 in every 10 employees** working in the IT and Communications sectors
- **£1 in every £180** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 140 employees** working in the private sector and **£1 in every £130** of GVA as a result of the firm's full economic impact



National impacts

Direct impact

BT Group directly employs a total of 6,250 people in Scotland, with a further 1,380 employed as contractors. These employees earned £280 million in wages and salaries.

Procurement impact

BT Group together spent around £180 million with suppliers based in Scotland in 2023/2024. The largest item was telecommunications, as illustrated below.

Total spend **£180 million**

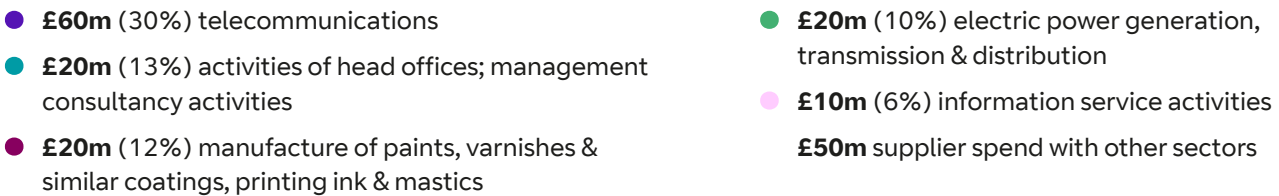


Figure 4-37: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the Scotland economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in Scotland = £180 million

1,560
FTE

Employment supported amongst suppliers

£130
million

GVA generated

Figure 4-38: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in Scotland earned £280 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the nation.

Figure 4-39 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in Scotland = £190 million

2,530
FTE



Employment supported in consumer industries

£190
million

£££

GVA generated

Figure 4-39: Induced (wage expenditure) impacts

Source: Hatch



Total impact in Scotland

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in Scotland. This is summarised in Figure 4-40 below.

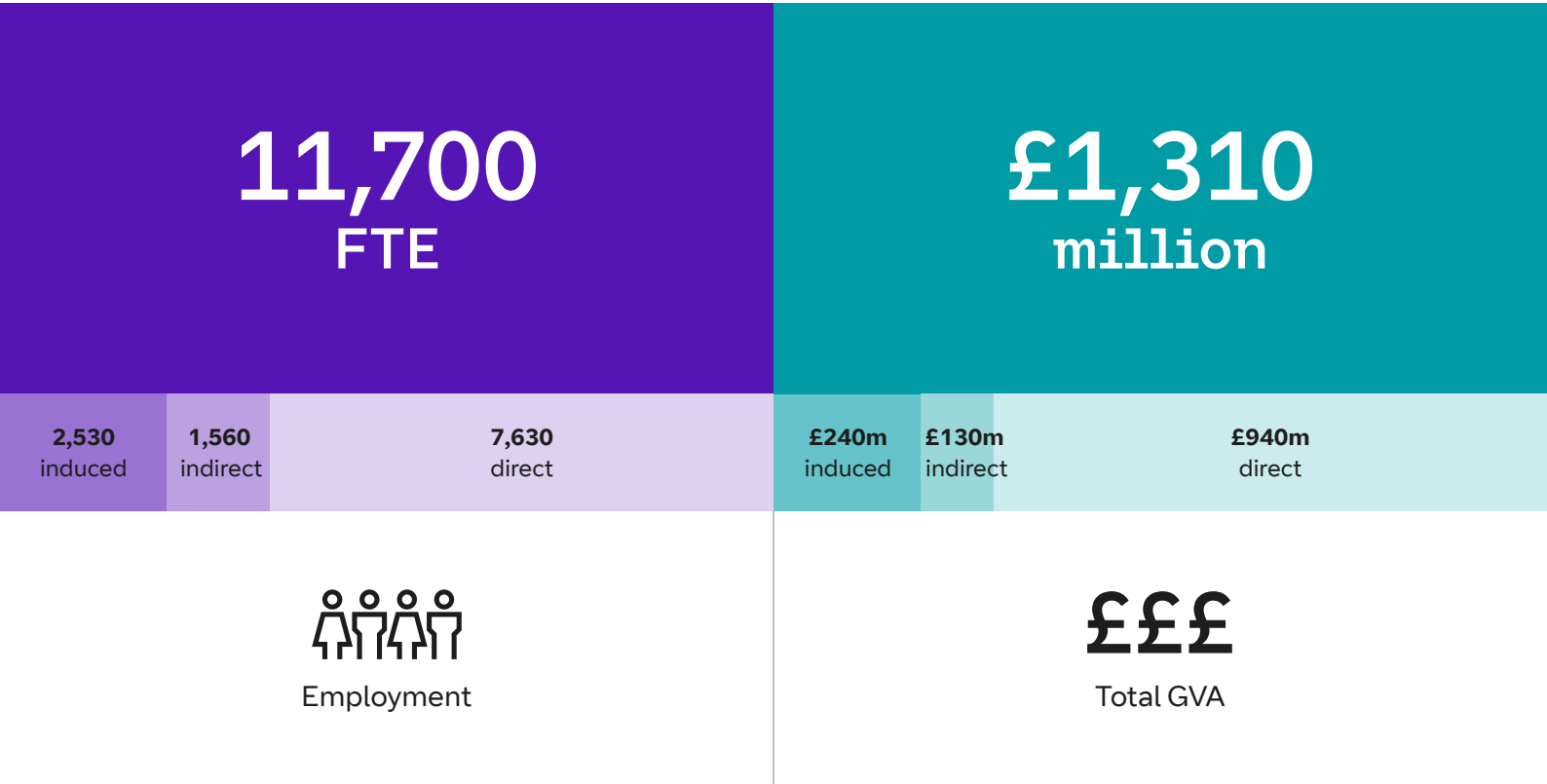


Figure 4-40: Total impact of BT Group

Source: Hatch

Local authority level

Key statistics for local authorities within Scotland are presented in the table below.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Aberdeen City	90	110	120	20
Aberdeenshire	160	150	220	30
Angus	30	230	90	10
Argyll and Bute	60	80	90	10
City of Edinburgh	440	310	600	80
Clackmannanshire	10	30	20	<5
Dumfries and Galloway	140	150	190	20
Dundee City	1,130	840	1,340	140
East Ayrshire	60	90	90	10
East Dunbartonshire	20	120	60	10
East Lothian	30	80	60	10
East Renfrewshire	10	140	80	10
Falkirk	910	990	1,350	140
Fife	210	320	440	50

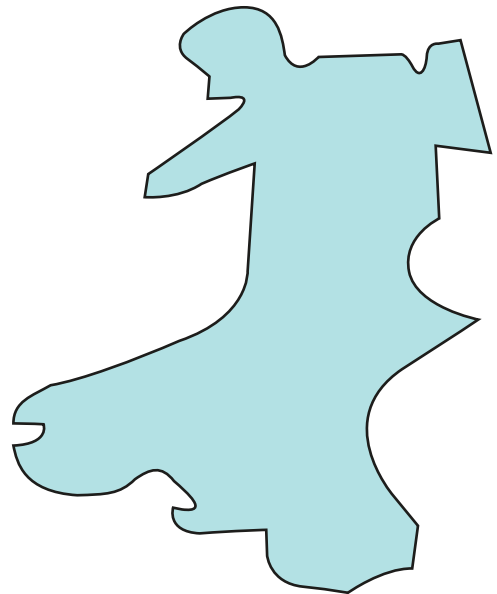
	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Glasgow City	2,180	800	2,530	330
Highland	420	420	540	60
Inverclyde	370	380	460	50
Midlothian	20	90	50	5
Moray	50	70	80	10
Na h-Eileanan an Iar	20	20	30	<5
North Ayrshire	30	130	70	10
North Lanarkshire	130	400	270	30
Orkney Islands	20	20	30	<5
Perth and Kinross	80	120	120	10
Renfrewshire	90	280	580	50
Scottish Borders	100	110	730	70
Shetland Islands	10	10	20	<5
South Ayrshire	100	110	140	20
South Lanarkshire	370	640	740	70
Stirling	100	80	130	20
West Dunbartonshire	90	170	140	20
West Lothian	140	200	340	40

Wales

4

Key points – Across Wales in 2023/24

- **5,180 BT Group employees** live in the nation (FTE)
- **4,540 BT Group employees** work in the nation (FTE)
- **£150 million** total income of BT Group employees working in the nation
- **£130 million** spend with suppliers based in the nation
- **£680 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 180 employees** working in the private sector, and **1 in every 6 employees** working in the IT and Communications sectors
- **£1 in every £150** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 110 employees** working in the private sector and **£1 in every £110** of GVA as a result of the firm's full economic impact



National impacts

Direct impact

BT Group directly employs a total of 4,200 people in Wales, with a further 340 employed as contractors. These employees earned £150 million in wages and salaries.

Procurement impact

BT Group together spent around £130million with suppliers based in Wales in 2023/2024. The largest item came under other professional, scientific and technical activities, as illustrated below.

Total spend **£130 million**

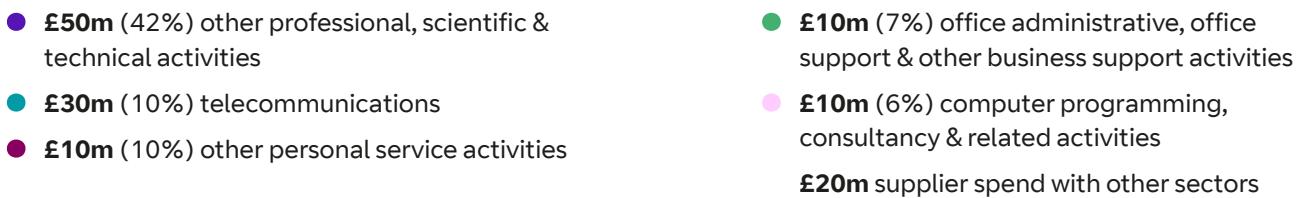


Figure 4-41: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the Wales economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in Wales = £130 million

1,610
FTE

Employment supported amongst suppliers

£90
million

GVA generated

Figure 4-42: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in Wales earned £180 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the nation.

Figure 4-43 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in Wales = £180 million

1,350
FTE



Employment supported in consumer industries

£100
million

£££

GVA generated

Figure 4-43: Induced (wage expenditure) impacts

Source: Hatch



Total impact in Wales

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in Wales. This is summarised in Figure 4-44 below.

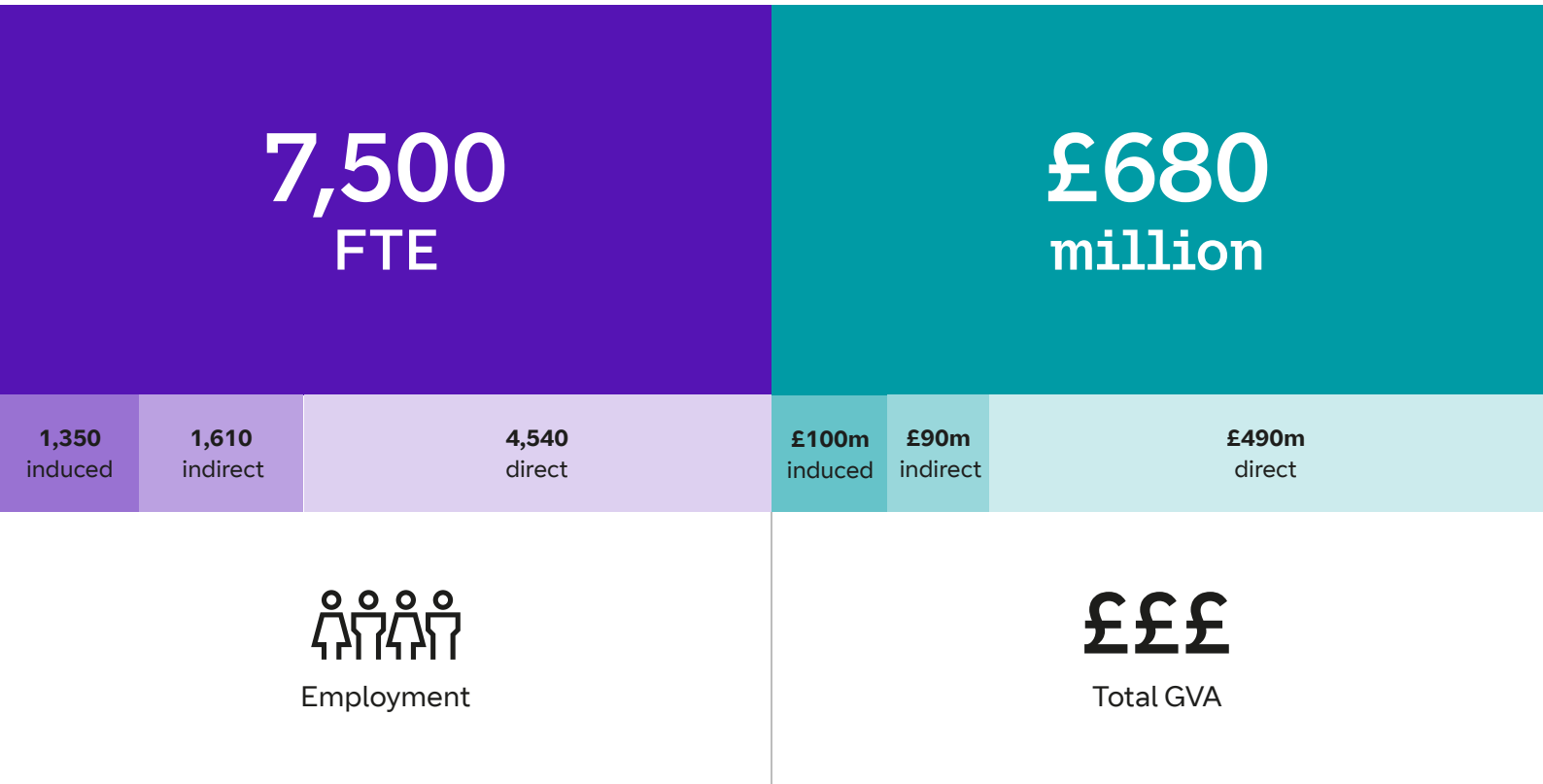


Figure 4-44: Total impact of BT Group

Source: Hatch

Local authority level

The table below illustrates the economic impact BT Group has at a sub-regional level in Wales across local authority areas.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Blaenau Gwent	10	170	40	<5
Bridgend	90	170	130	20
Caerphilly	40	370	110	10
Cardiff	1,470	800	2,090	240
Carmarthenshire	150	220	210	20
Ceredigion	50	60	70	10
Conwy	80	100	110	10
Denbighshire	60	70	260	20
Flintshire	80	170	900	60
Gwynedd	300	230	340	40
Isle of Anglesey	20	80	40	<5
Merthyr Tydfil	990	510	1,060	80

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Monmouthshire	80	120	230	20
Neath Port Talbot	20	140	50	<5
Newport	120	200	240	20
Pembrokeshire	70	100	90	10
Powys	150	170	200	20
Rhondda Cynon Taf	40	550	260	20
Swansea	510	410	610	60
Torfaen	40	100	80	10
Vale of Glamorgan	20	200	70	10
Wrexham	170	240	310	30

Northern Ireland

BT Group

BT Group

Riverside Tower
5 Lanyon Place

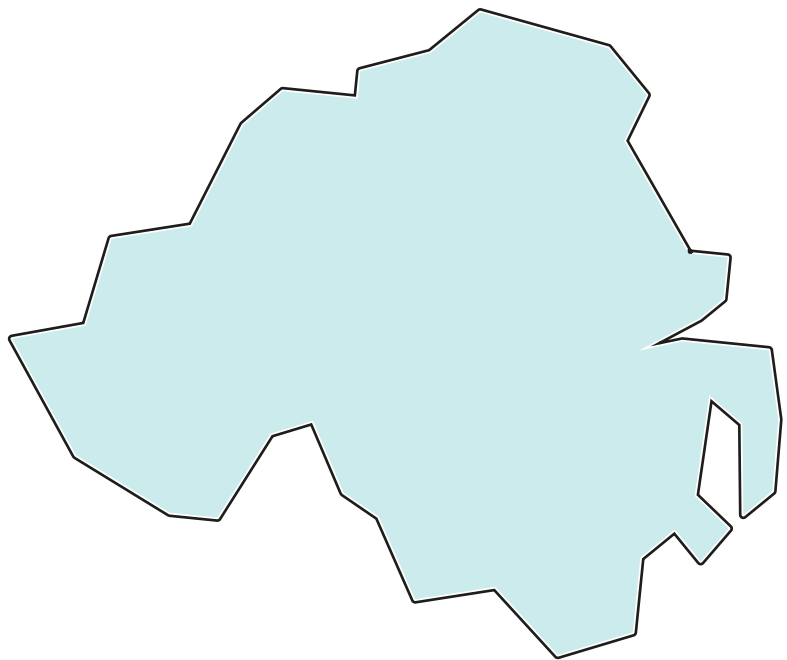
BT Group

Riverside Tower
5 Lanyon Place

4

Key points – Across Northern Ireland in 2023/24

- **3,490 BT Group employees** live in the nation (FTE)
- **3,480 BT Group employees** work in the nation (FTE)
- **£140 million** total income of BT Group employees working in the nation
- **£90 million** spend with suppliers based in the nation
- **£630 million** total GVA impact (including indirect and induced effects)
- BT Group employed **1 in every 140 employees** working in the private sector, and **1 in every 8 employees** working in the IT and Communications sectors
- **£1 in every £110** of GVA was generated directly by BT Group.
- BT Group supported **1 in every 90 employees** working in the private sector and **£1 in every £80** of GVA as a result of the firm's full economic impact



National impacts

Direct impact

BT Group directly employs a total of 3,100 people in Northern Ireland, with a further 390 employed as contractors. These employees earned £140 million in wages and salaries.

Procurement impact

BT Group together spent around £90 million with suppliers based in Northern Ireland in 2023/2024. The largest item was construction, as illustrated below.

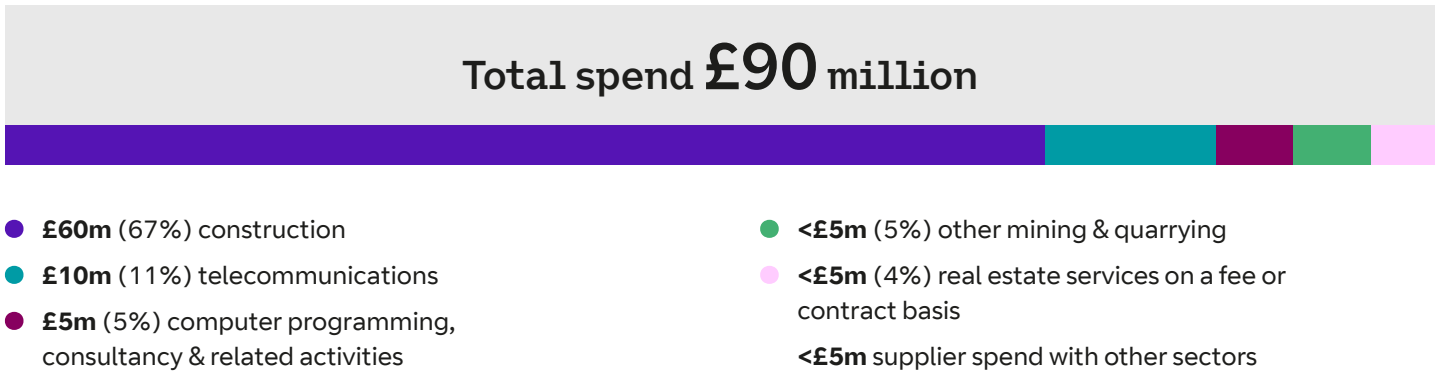


Figure 4-45: Top five supplier sectors by value of expenditure

Source: BT Group Procurement data

BT Group's spend with suppliers results in significant benefits for the Northern Ireland economy (including knock-on or multiplier benefits as a result of supplier spend). This is summarised below.

BT Group supply chain spend in Northern Ireland = £90 million

**800
FTE**

Employment supported amongst suppliers

**£60
million**

GVA generated

Figure 4-46: Indirect supply chain impact

Source: Hatch

Impact of BT Group and supplier employee expenditure (induced)

BT Group employees and contractors living in Northern Ireland earned £140 million in 2023/24. In turn, their expenditure supports further employment and output in consumer industries in the nation.

Figure 4-47 below illustrates the wider induced employment and output supported through this employee expenditure.

Salaries of BT Group employees and contractors in Northern Ireland = £140 million

1,250
FTE



Employment supported in consumer industries

£140
million

£££

GVA generated

Figure 4-47: Induced (wage expenditure) impacts

Source: Hatch



Total impact in Northern Ireland

Combining BT Group’s direct impact and employment with the indirect supply chain impact and induced wage expenditure impact gives the total impact of the firm’s operations in Northern Ireland. This is summarised in Figure 4-48 below.

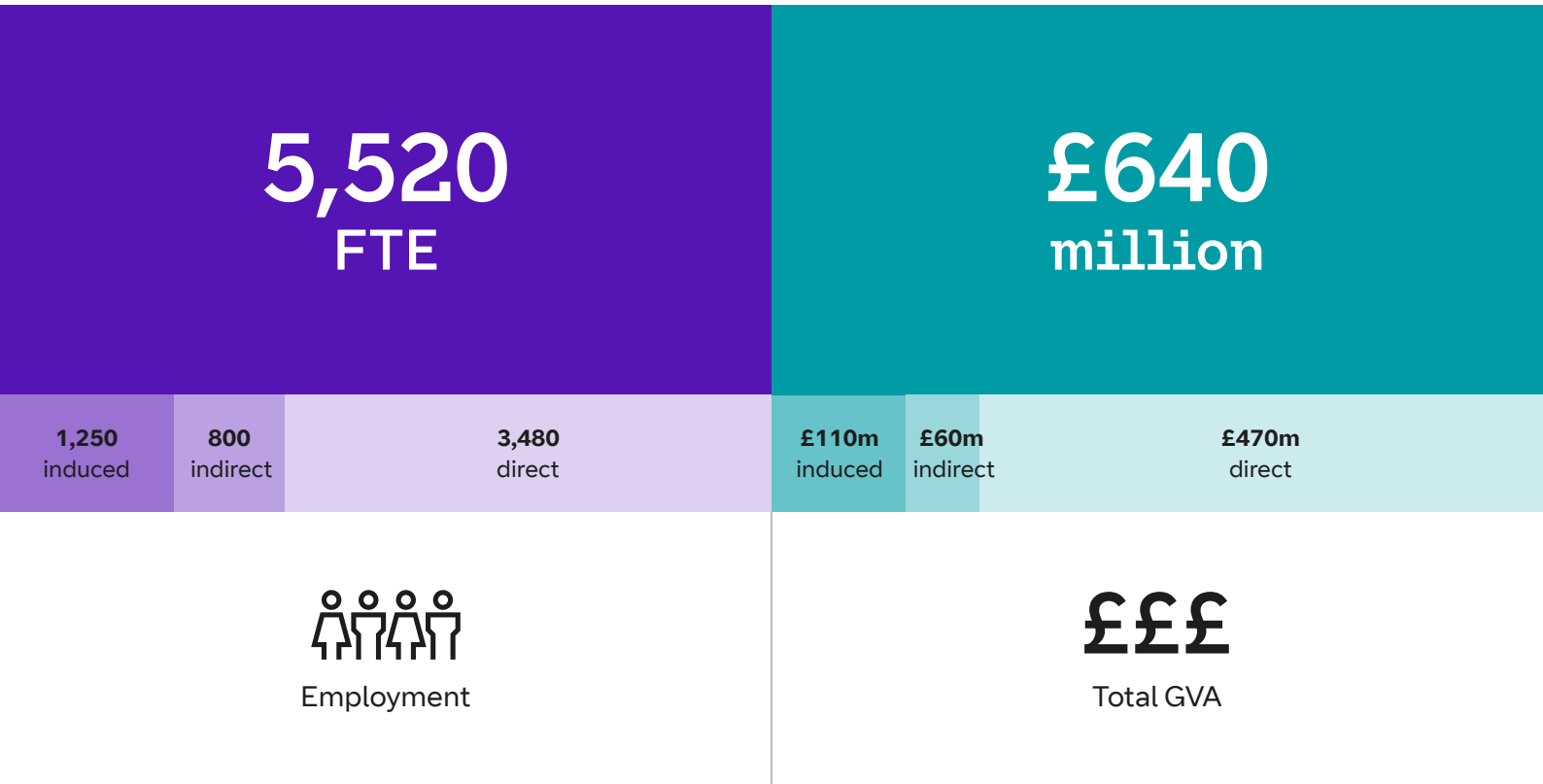


Figure 4-48: Total impact of BT Group

Source: Hatch

Local authority level

Key statistics for local authorities within Northern Ireland are presented in the table below.

	BT Group employees & contractors		Total impact	
	Work in area	Resident in area	Employment	GVA £ million
Belfast	2,330	1,080	2,820	370
Antrim and Newtownabbey	170	300	290	30
Ards and North Down	60	250	150	20
Armagh City, Banbridge and Craigavon	60	280	200	20
Causeway Coast and Glens	50	140	100	10
Derry City and Strabane	230	240	310	40
Fermanagh and Omagh	310	330	460	50
Lisburn and Castlereagh	70	320	330	30
Mid and East Antrim	90	260	180	20
Mid Ulster	40	120	560	40
Newry, Mourne and Down	60	170	130	10

Technical appendices

Methodology used

5

Here we set out the methodology used to estimate the economic impact of BT Group and the data sources that have been drawn upon.

Definitions

There are three sources of economic impact that a company like BT Group generates.

Direct impacts

These are the impacts arising as a direct consequence of the company's activities, in the form of output and wealth creation, employment within the firm and associated employment income.

Indirect impacts

Also known as the supply chain impact, this contribution arises from BT Group's purchasing of goods and services from suppliers in the UK, who in turn make further purchases from their suppliers, and so on. This chain of procurement spending resulting from BT Group's initial expenditure injection creates further wealth, and supports jobs and income.

Induced impacts

Further economic activity and employment is created as BT Group employees and those whose jobs are supported through supply chain effects spend their wages and salaries on goods and services.

The economic effects from this consumer spending are known as the induced effect.

Throughout the report these impacts are measured using four key indicators:

Gross value added (GVA)

This is the key measure of wealth creation within an economy and is used by the government to monitor economic performance. It refers to the residual value created by firms once non-labour costs have been paid, which is then distributed to owners/shareholders in the form of profits and to employees via wages and salaries. It is measured in two ways:

- $GVA = \text{turnover} - \text{bought in goods and services}$ (known as the production approach)
- $GVA = \text{operating profit} + \text{depreciation and amortisation} + \text{taxes less subsidies on production} + \text{compensation of employees (i.e. wages plus social security contributions)}$ (known as the income approach)

Employment

This is the quantity of jobs supported by BT Group's activities. Since these jobs are a mix of full time and part time positions, throughout the report we refer to Full Time Equivalent (FTE) posts, in order to express all jobs in a common currency.

Methodology and data sources

The methodology used to estimate BT Group's economic impacts for 2023/24 has been designed to be consistent with previous reports. Further information is provided below.

Direct impacts

Procurement and financial data in this report covers the financial year 2023/24. Staff data was obtained from BT Group's HR and financial systems in summer 2024. Hence there are slight differences from the figures contained in BT Group's Annual Report and Accounts, which report figures as at March 2024.

GVA has been calculated using the income approach, as the sum of gross operating profits before tax, interest, depreciation and amortisation, and compensation of employees. We have estimated UK gross operating profit using global EBITDA* from the accounts, and estimated the UK portion by factoring down by the UK share of total revenues. Compensation of employees has been estimated using data on gross wages and salaries (sourced from BT Group), plus social security costs (sourced from BT Group).

* Earnings before interest, tax, depreciation and amortisation

Employment numbers have been sourced from a snapshot of information provided by BT Group, with data on the number of people employed directly by BT Group and the number of contractors employed through agencies, along with their contracted hours. These have then been converted to FTEs based on one full time job being equivalent to a 37.5 hour per week contract. The data indicates both the place of residence and place of work of each employee. For direct employment we have used workplace based figures.

The BT Group data provided the home and workplace postcode for each employee. These were used to allocate employees to regions and local authorities for the residence and workplace based analysis. Home postcodes were not available for agency staff and contractors. The assumption was made that these members of staff were resident in the same Local Authority and Region as their workplace.

Information on contractor staff was supplied by BT Group.

Indirect impacts

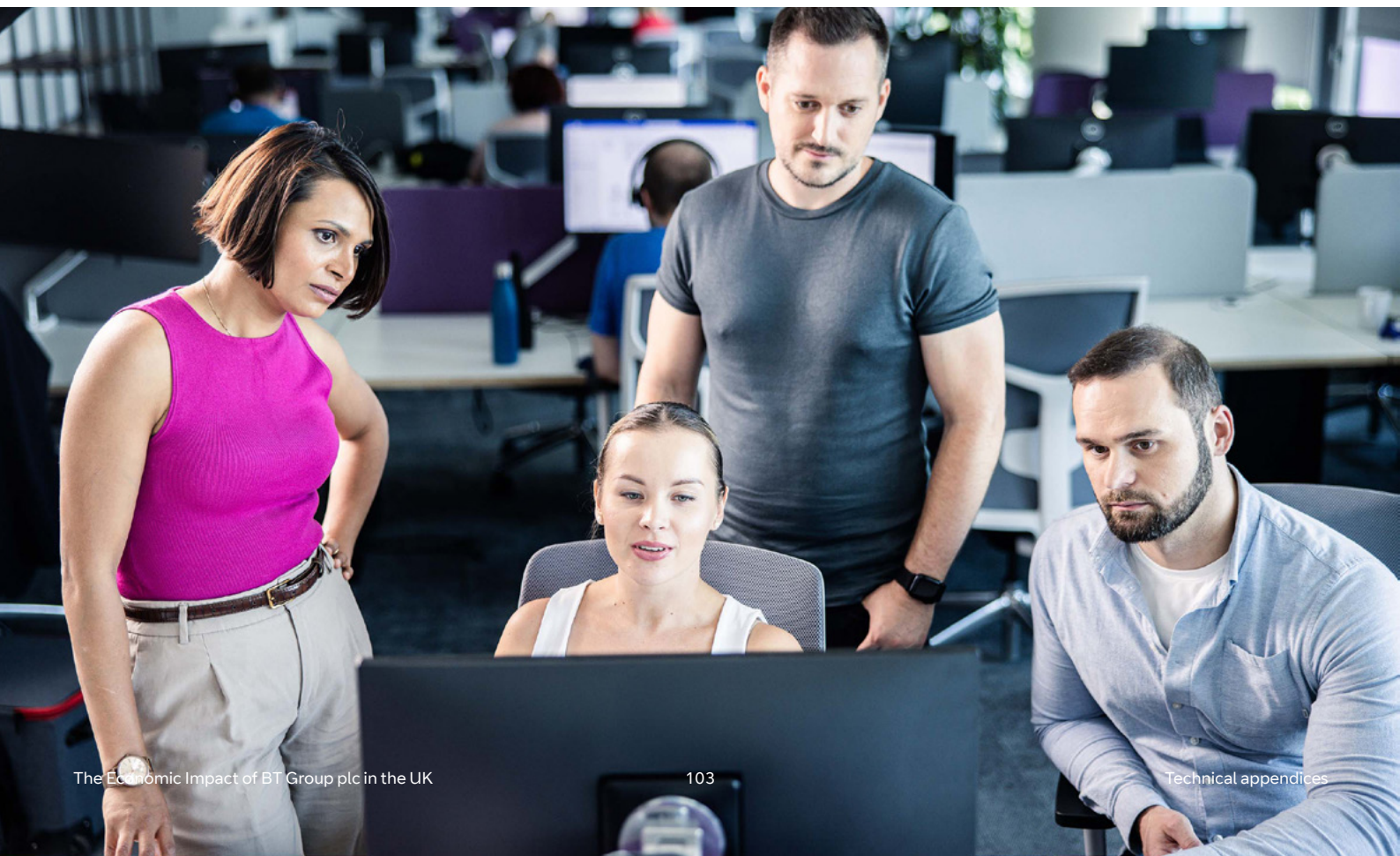
The data source used to estimate indirect impacts has been provided by BT Group by location and by sector. Each supplier to BT Group was allocated to a region and local authority based on the invoicing address. All suppliers were matched to Companies House Database to obtain the 2 digit Standard Industrial Classification (SIC) code.

As expenditure on contract and agency staff is encompassed by the employment element of the direct impact assessment, all identifiable procurement expenditure with employment agencies has been removed from the supplier spend analysis, in order to avoid double counting.

Impacts have been estimated using Hatch Urban Solutions' input-output tables for the UK and the regions.

Induced impacts

Data on wages and salaries of BT Group employees and contractors by place of residence has been used to calculate induced impacts, along with the employment income of indirect employees estimated above.



The regional and local dimension

The HQ effect

National procurement contracts are often allocated to a location according to the supplier's HQ address. However, it may be that these services are actually provided from a series of locations around the country.

This process of allocating the procurement expenditure to the HQ location, rather than the location of the depot where activity is taking place, may skew impacts to the HQ region and consequently under-estimate impacts elsewhere. We have adopted this approach as in previous year's assessment. It does mean that the results pertaining to indirect impacts in particular may be subject to significant margins of error, particularly at the local level.



Benchmarking the results

The report sets the key results in their wider socio-economic context, in order to illustrate the relative scale of BT Group's contribution to the local, regional and national economy. To do this we have drawn down nationally published statistics. The data sources used are as follows:

1. **Total employees in employment:** The total number of people employed by all businesses with operations in the area. This excludes working proprietors and is presented as Full Time Equivalent employees (it excludes the self-employed).
(Source: ONS, BRES, 2022; 2021 Northern Ireland)
2. **Total IT and communications sector employees in employment:** The total number of people employed by ICT businesses with operations in the area. This excludes working proprietors and is presented as Full Time Equivalent employees (it excludes the self-employed).
(Source: ONS, BRES, 2022)
3. **Total private sector employees in employment:** The total number of people employed by private sector businesses with operations in the area. This excludes working proprietors and is presented as Full Time Equivalent employees (it excludes the self-employed).
(Source: ONS, BRES, 2022)
4. **Total gross earnings from all residents in employment:** This has been derived using the total number of residents in employment (source: Annual Population Survey, 2021) multiplied by the average gross annual pay for all employees in that geographical area.
(Source: Annual Survey of Hours and Earnings, 2023)
5. **Total gross earnings from all employees in employment:** This has been derived using the total number of people employed by businesses in the area (source: BRES, 2022) multiplied by the average gross annual pay for all employees in that geographical area.
(Source: Annual Survey of Hours and Earnings, 2023)
6. **Total GVA - Total gross value added generated by businesses based in the area:** GVA data has been provided for regions and selected LEP areas.
(Source: ONS, GVA: Dataset was published in 2024; based on 2019 prices.)

Rounding

Figures in this report have been rounded to:

- Make them easier to read and compare.
- Reduce the risk of identifying individuals from published figures when presenting data at a more granular geographic level.
- Avoid spurious accuracy when presenting estimates from economic impact calculations.

The table below summarises the rounding protocol adopted in the report.

Figure	Rounding Protocol
$\geq 1,000$	3 significant figures
100 to 999	2 significant figures
5 to 99	1 significant figures
1 to 5	Presented as <5
0	Presented as 0





BT Group plc

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