

Debate Pack

7 November 2022

Number CDP 2022-0193

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Levelling Up Rural Britain

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Summary

A debate has been scheduled in the Commons Chamber for 9 November 2022 on "Levelling Up Rural Britain." The subject for the debate has been chosen by the Backbench Business Committee.

1 Background

1.1 What is meant by ‘levelling up’?

In his first speech as Prime Minister in July 2019, the then Prime Minister Boris Johnson spoke of a need to “level up across Britain” and “answer the plea of the forgotten people and the left-behind towns”, unleashing the “the productive power” of every corner of the country.”¹

Levelling up was also addressed in the Conservative Party’s 2019 election manifesto.² This pledged to “to use our post-Brexit freedoms to build prosperity and strengthen and level up every part of the country”, through specific measures, such as:

- Investing in towns, cities, and rural and coastal areas
- Giving those areas more control of how investment is made
- Levelling up skills using apprenticeships and a £3bn National Skills Fund
- Creating up to 10 freeports to help deprived communities.

Similarly, the 2021 Queen’s Speech stated the Government will “level up opportunities across all parts of the United Kingdom, supporting jobs, businesses and economic growth and addressing the impact of the pandemic on public services.”³

Levelling up was intended to address the longstanding problem of the UK’s regional economic disparities. The 2020 Institute for Fiscal Studies (IFS) Green Budget included a chapter on levelling up, which identified the following characteristics of areas most in need of levelling up:

A ‘left-behind’ area, in need of ‘levelling up’, is characterised by broad economic underperformance, which manifests itself in low pay and employment, leading to lower living standards in that area. Behind these factors lie other considerations such as poor productivity, which in turn may be associated with a low skill base. The health of the population may also be relatively poor: in some cases, this could be a legacy of deindustrialisation or long-term unemployment, as well as deep-rooted socio-economic issues.⁴

¹ Prime Minister’s Office, [Boris Johnson's first speech as Prime Minister](#), 24 July 2019

² [Conservative and Unionist Party Manifesto 2019 \(PDF\)](#) [accessed 16 February 2022]

³ Prime Minister’s Office, [Queen's Speech 2021](#), 11 May 2021

⁴ IFS, [Levelling up: where and how?](#), IFS Green Budget 2020, chapter 7, October 2020, p325

1.2

The Levelling Up White Paper and Bill

The Government published its [Levelling Up the United Kingdom white paper](#) on 2 February 2022.

The Government used the white paper to set 12 targets, or “missions” linked to policy objectives. The targets all have a 2030 end date, “setting the medium-term ambition” of the Government.

The 12 missions are under four objectives, summarised in the table below.

There are also key targets and policies, designed to help meet these objectives. Some of these were announced in the white paper, while many are existing policies. The Government says that policies set out in the white paper “will begin to have visible effects” in the “next few years”.

The [Levelling Up and Regeneration Bill 2022-23](#) had its First Reading in the House of Commons on 11 May 2022 and its [Second Reading on 8 June 2022](#).

The Bill is now due to have its report stage and third reading on a date to be announced.

Part 1 of the Bill would place a duty on the government to publish a “statement of levelling-up missions”. It would also require the government to report annually on progress towards achieving those missions.

The mission statement must cover a period of at least five years. It must include target dates for meeting each of the missions and metrics for measuring progress. The government would be able to modify the mission statement and update the metrics and target dates.

The Explanatory Notes explain that the purpose of this Part is to make sure the government is held to account by Parliament on levelling-up and that information on progress is available to the public.⁵

For more information on the Levelling Up White Paper, see the Library briefing [Levelling up: What are the Government’s proposals?](#). For more information on the Levelling Up and Regeneration Bill see the Library briefing [Levelling Up and Regeneration Bill 2022-23](#).

⁵ DLUHC, [Levelling-Up and Regeneration Bill: Explanatory Notes \(PDF\)](#), paragraph 20.

The Government's levelling up objectives and missions

Focus Area	Mission
Boost productivity, pay, jobs and living standards by growing the private sector, especially in those places where they are lagging	
1 Living Standards	By 2030, pay, employment and productivity will have risen in every area of the UK, with each area containing a globally competitive city, and the gap between the top performing and other areas closing.
2 Research & Development (R&D)	By 2030, domestic public investment in R&D outside the Greater South East will increase by at least 40%, and over the Spending Review period by at least one third. This additional government funding will seek to leverage at least twice as much private sector investment over the long term to stimulate innovation and productivity growth.
3 Transport Infrastructure	By 2030, local public transport connectivity across the country will be significantly closer to the standards of London, with improved services, simpler fares and integrated ticketing.
4 Digital Connectivity	By 2030, the UK will have nationwide gigabit-capable broadband and 4G coverage, with 5G coverage for the majority of the population.
Spread opportunities and improve public services, especially in those places where they are weakest	
5 Education	By 2030, the number of primary school children achieving the expected standard in reading, writing and maths will have significantly increased. In England, this will mean 90% of children will achieve the expected standard, and the percentage of children meeting the expected standard in the worst performing areas will have increased by over a third.
6 Skills	By 2030, the number of people successfully completing high-quality skills training will have significantly increased in every area of the UK. In England, this will lead to 200,000 more people successfully completing high quality-skills training annually, driven by 80,000 more people completing courses in the lowest skilled areas.
7 Health	By 2030, the gap in Healthy Life Expectancy (HLE) between local areas where it is highest and lowest will have narrowed, and by 2035 HLE will rise by five years.
8 Well-being	By 2030, well-being will have improved in every area of the UK, with the gap between top performing and other areas closing.

Focus Area	Mission
Restore a sense of community, local pride and belonging, especially in those places where they have been lost	
9 Pride in Place	By 2030, pride in place, such as people's satisfaction with their town centre and engagement in local culture and community, will have risen in every area of the UK, with the gap between top performing and other areas closing.
10 Housing	By 2030, renters will have a secure path to ownership with the number of first-time buyers increasing in all areas; and the government's ambition is for the number of non-decent rented homes to have fallen by 50%, with the biggest improvements in the lowest performing areas.
11 Crime	By 2030, homicide, serious violence and neighbourhood crime will have fallen, focused on the worst affected areas.
Empower local leaders and communities, especially in those places lacking local agency	
12 Local Leadership	By 2030, every part of England that wants one will have a devolution deal with powers at or approaching the highest level of devolution and a simplified, long-term funding settlement.

Source: HM Government, [Levelling Up the UK white paper](#), Feb 2022, table 2.1

1.3

Levelling up in rural areas

The Department for Environment, Food and Rural Affairs has published two papers on “rural proofing” in England, in response to an April 2019 report by the House of Lords Select Committee on the Rural Economy, which recommended the development of “a comprehensive, overarching, long-term rural strategy for the rural economy.”⁶

The first of these was published in March 2021, and outlined government plans to identify and meet the needs of rural areas, around four themes:

- Strengthening the rural economy
- Developing rural infrastructure
- Delivering rural services
- Managing the natural environment.⁷

⁶ House of Lords Select Committee on the Rural Economy, [Time for a strategy for the rural economy](#), HL Paper 330, 27 April 2019, pg. 8

⁷ Defra, [Rural Proofing in England 2020 Delivering policy in a rural context](#), March 2021, pg. 7

The second rural proofing report was published in September 2022, following the publication of the Levelling Up White Paper. This identifies “specific challenges that must be tackled” if rural areas “are to be levelled up.”⁸

The Annex to this report summarises how the 12 missions identified in the Levelling Up White Paper apply specifically to rural areas and government policies designed to meet mission targets in rural areas – see [pages 32-40](#).

1.4

Statistics on the rural economy

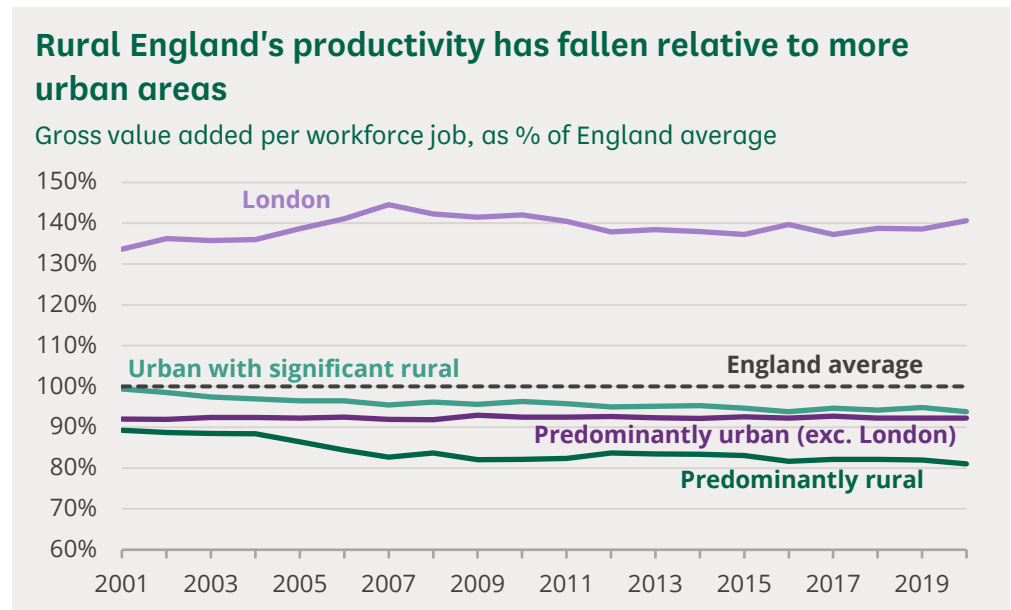
In 2020, data published by Defra indicates that predominantly rural areas of England contributed about £252.6 billion towards England’s economy (15% of the total), despite accounting for about 21% of the country’s population.⁹

This reflects the fact that rural productivity is somewhat lower than it is in more urban areas of the country. In 2020, productivity in predominantly rural areas was 81% of the England-wide average (measured as economic output per job). This compares to 92% of the England average in predominantly urban areas outside London, and 141% of the England average within London.

Productivity has also been decreasing over the years in rural areas, relative to other parts of the country. As the chart below shows, productivity in predominantly rural areas was 89% of the England average in 2001, but this proportion has fallen fairly steadily since then, partly because higher productivity in London has pulled the country-wide average upwards.

⁸ Defra, [Delivering for rural England – the second report on rural proofing](#), September 2022

⁹ All statistics in this section are from Defra, [Rural productivity and gross value added \(GVA\)](#), 21 July 2022



Source: Defra, [Statistical Digest of Rural England](#), 25 August 2022, worksheet 9

This difference is not because the rural economy consists of a significantly different set of industries to urban areas – indeed, analysis by Defra shows that the breakdown of the industries with the greatest economic output is broadly similar between predominantly rural and predominantly urban areas (outside London).

There are some differences in smaller industries – for example, financial and insurance activities make up 6% of output in predominantly urban areas outside London, but just 2% of output in predominantly rural areas. Information and communication businesses show a similar difference (7% in urban areas, 3% in rural areas). Although agriculture obviously tends to be a rural activity, it does not make much of a difference to the overall economic figures, accounting for just 2% of predominantly rural economic output.

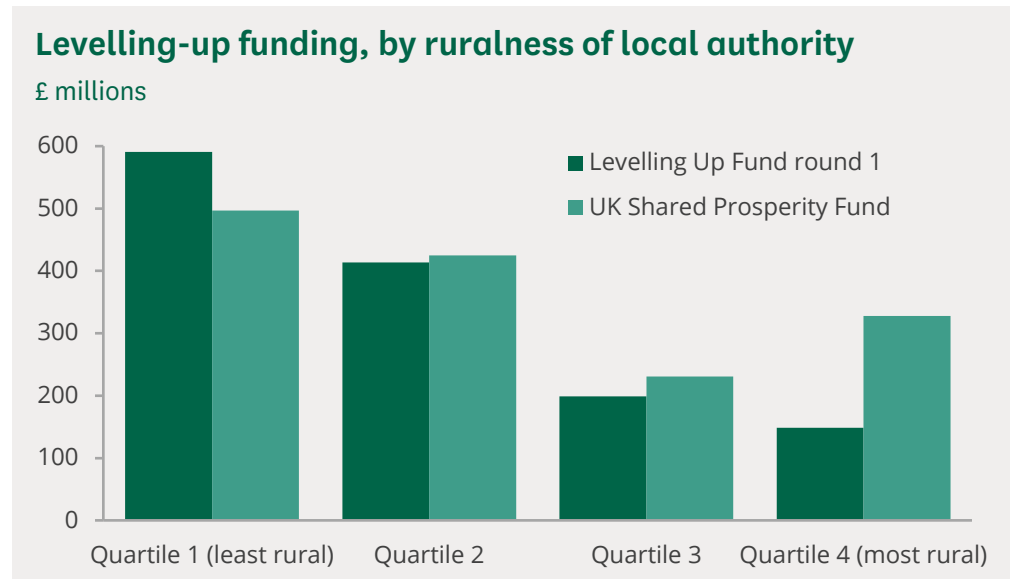
1.5 Levelling up funding in rural areas of England

The Government has created several different funds under the banner of “[New levelling up and community investments](#)”. Two of the largest are the Levelling Up Fund (set to be worth £4.8 billion across its lifetime) and the UK Shared Prosperity Fund (UKSPF), worth £2.6 billion between 2022/23 and 2024/2025.¹⁰

Using the Office for National Statistics’ 2011 [rural/urban classification system](#), we can look at the money allocated from these funds so far to see where it has gone within England. This money went to 255 different authorities in

¹⁰ For more information on these funds and funding allocations, see the Library briefings [The UK Shared Prosperity Fund](#) and [Local Growth Funds](#)

England; we can divide these into four equal groups (‘quartiles’) based on the proportion of each authority’s population living in a rural area. Funding to each of these quartiles breaks down as shown in the chart below.



Note: “Ruralness” here refers to the proportion of the population of the local authority living in a rural area. The different local authorities receiving funding vary widely in total population.

Source: Library calculations, based on DLUHC, [Levelling Up Fund: first round successful bidders](#) and [UKSPF allocations](#), and ONS, [Rural Urban Classification \(2011\) of Local Authority Districts in England](#) and [Lower layer Super Output Area population estimates](#)

This shows that 44% of the funding allocated in England in the first round of the Levelling Up Fund, and 34% of England’s UK Shared Prosperity Fund allocations, went to the least rural local authorities in the country. The most rural local authorities received comparatively little.

However, this does not necessarily mean that rural local authorities are being underfunded when it comes to levelling up funding, because England’s population is also very heavily skewed towards urban areas. Based on population estimates for mid-2020, only about 17% of England’s population lives in rural areas.¹¹

Levelling up funding specifically for rural areas

In September 2022, the Rural England Prosperity Fund was launched. This is designed to replace EU funding from LEADER and the Growth Programme, which were part of the Rural Development Programme for England. It is designed to fund capital projects for small businesses and community infrastructure, with the aim of improving productivity and strengthening the rural economy.

¹¹ This proportion is lower than the 21% living in “predominantly rural” areas given above in section 1.4 because of differences in the way the two figures are calculated.

The Rural Fund will act as a “rural top-up to UKSPF allocations”, supporting activities “that specifically address the particular challenges rural areas face”, complementary to funding used to support rural areas under the UKSPF.¹²

To receive funding, eligible local authorities must complete an application as an addendum to their UKSPF investment plan. The window for submitting applications opened on 3 October 2022 and will close on 30 November 2022. First payments from the Rural Fund are expected to be made in April 2023, with the Fund lasting until March 2025.

Funding will be awarded to Mayoral Combined Authorities, unitary authorities and upper and lower tier authorities – local authorities that are eligible for the Fund are

- 83 predominantly rural authorities - with at least 50% of the population in rural areas or hub (market) towns
- 50 urban with significant rural authorities - with at least 25% of the population in rural areas or hub towns
- 175 predominantly urban authorities - with less than 25% of the population in rural areas or hub towns.

Funding allocations by region are shown in the table below – a full list of funding by individual local authorities has been published by Defra – see [Rural England Prosperity Fund: allocations.](#)

Rural England Prosperity Fund, regional allocations		
	£ millions	% total
South West	21.6	20%
South East	18.8	17%
East of England	17.9	17%
East Midlands	13.1	12%
Yorkshire and Humber	11.6	11%
North West	9.1	8%
West Midlands	8.9	8%
North East	7.2	7%
London	0.0	0%
Total	108.3	100%

Source: [Defra](#)

¹² DEFRA, [Rural England Prosperity Fund: prospectus](#), September 2022

1.6

Farm support schemes

Whilst the UK was an EU Member State, it participated in the [Common Agricultural Policy \(CAP\)](#), under which UK farmers received some £3.5 billion of support annually. Some 80% of payments were ‘direct payments’ made to farmers based broadly on the area of land farmed. In addition, farmers could apply for agri-environment schemes under which payments were linked to certain environmental actions, such as improving habitats. The [Government has committed to keep overall farm funding at this level for the duration of this Parliament](#). New approaches are being developed in the UK nations. In England, the changes are being phased in over an agricultural transition period from 2021-2027 under measures in the [Agriculture Act 2020](#). The key change is a move away from direct payments towards payments for ‘public goods’, such as environmental or animal welfare improvements.

Information on farm support programmes and the Government’s implementation of the Agriculture Act measures is set out in the Commons Library Briefing [Farm funding: implementing new approaches](#) published on 6 July 2022.

Since publication of the briefing, on 23 September 2022, the Government published a [Growth Plan 2022](#) which indicated that it would review “frameworks for regulation, innovation, and investment that impact farmers and land managers in England” with the aim of strengthening UK food security and maximising the “long-term productivity, resilience, competitiveness, and environmental stewardship of the British countryside”.

A number of environmental and other NGOs, such as the [National Trust](#) and [the RSPB](#), expressed concerns about the Growth Plan, including about the environmental impact if Environmental Management Schemes (ELMs) for farmers were to be rolled back. The [NFU was reported to be supportive of the proposal to review the ELMS approach, in collaboration with farmers](#), so that the schemes could “boost growth and farming’s contribution to the nation”.

[Defra has refuted claims that it was planning to scrap ELMs or “go back on its commitment to the environment”](#). It said that in September 2022 that a:

“strong environment and a strong economy go hand-in-hand. We have legislated through the Environment Act and will continue to improve our regulations and wildlife laws in line with our ambitious vision. We want every corner of our country to prosper too. Bureaucratic processes in the planning system do not necessarily protect the environment so, by making sure we have the right regulations for our nation, we can make this happen.

[...] Boosting food production and strengthening resilience and sustainability come alongside, not instead of, protecting and enhancing our natural environment, and later this year we will set out more details of plans on how we will increase food security while strengthening the resilience and role of farmers as stewards of the British countryside”.

[Farming Minister Mark Spencer further said in a Written Answer on 28 October 2022](#) that Defra remained “committed to environmental land management” and was working closely with the sector to look at “how best to deliver the schemes to see where and how improvements can be made”. Further information would be provided “by the end of this year”.

Beyond direct farm support schemes, there are a number of areas where Government policies impact on farm businesses, including measures: on the food supply chain; on labour availability for the agriculture and horticulture sector; and on input costs such as energy and fertilisers.

The following Commons Library Briefings provide information these issues:

Agri-food supply chain:

[The National Food Strategy and food security](#), 21 October 2022

[Debate on supporting local food infrastructure](#), 6 September 2022

Labour:

[Seasonal Worker Visas and UK Agriculture](#), 4 November 2022

Input costs:

[The effect of the war in Ukraine on UK farming and food production](#), 18 July 2022

[Support for farmers with the cost of living](#), 7 July 2022

2 Statistics on rural and urban England

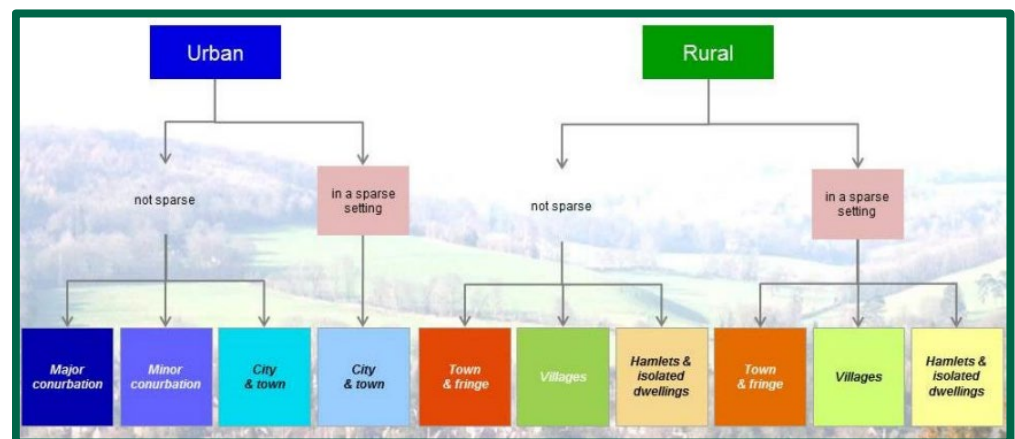
Defra publish the [Statistical Digest of Rural England](#) on an annual basis. This report lists key statistics on the population, economy, housing, health and crime in rural areas. It compares these measures between urban and rural areas.¹³

2.1 Defining rural areas

The Digest uses different classifications of how rural or urban an area is. This is because some statistics are available for very small areas (which are easy to categorise into graduations of rural to urban) and some for local authorities (which are sometimes a mixture of rural and urban areas, meaning a different classification needs to be used). There are two different classifications that are used to determine whether a place is rural or not:

The Rural Urban Classification

This classification is applied to census output areas (OAs), of which there are over 170,000 in England. If the population-weighted centre of an OA is in a built-up area (an area with a population of more than 10,000), then it is categorised as urban. If the centre is outside of a built-up area, it is rural. The population density is also analysed, to give four urban sub-categories and six rural sub-categories which each OA is also assigned to.¹⁴



Source: Defra, [Statistical Digest of Rural England](#), 2022, p. 6.

¹³ Defra, [Statistical Digest of Rural England](#), 2022

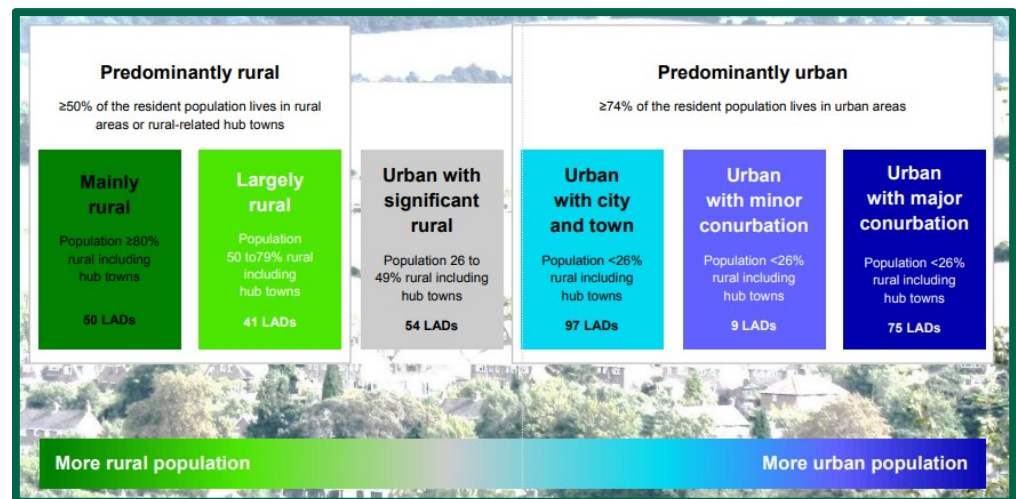
¹⁴ Defra, [The 2011 Rural-Urban Classification for Output Areas in England](#), 2017

This classification is used for data that is available at a small geographical scale.

The Local Authority Classification

Under this classification, local authority districts are categorised on a six-point scale, according to what percentage of residents live in rural areas (or rural “hub towns”. The proportion of people living in rural areas is calculated using the first Rural-Urban Classification above.

The advantage of the Local Authority Classification is that it can be used to analyse statistics that are not available by output areas, but might only be available by local authority.¹⁵ This image shows the various categories used by this classification:



Source: Defra, [Statistical Digest of Rural England](#), 2022, p. 7

2.2

Statistics from the Digest

The statistics in the Digest use a mixture of the Rural-Urban and the Local Authority classifications, meaning that a statistic that uses one classification cannot be directly compared with a statistic that uses another. For example, “Rural” and “Predominantly rural” refer to different types of areas (the former being more precise).

In addition, some of the statistics using the Local Authority Classification include London with other urban areas while others leave London out of the classification entirely.

¹⁵ Defra, [The 2011 Rural-Urban Classification for Local Authority Districts in England](#), 2017

Selected statistics from the Digest are presented in three tables below. The statistics are organised according to which rural/urban classification method is used.

Rural-Urban Classification

Rural/Urban England: Key statistics

Rural-Urban Classification, sourced from DEFRA's Statistical Digest of Rural England, 2022

Rural-Urban Classification					
Theme	Fact	Rural	Urban	Page no. in Digest	Year/s
Demography	Population	9,683,300	46,866,800	11	2019
	Proportion of population	17.1%	82.9%	11	2019
	Percentage of people aged over 65	25%	17%	13	2020
	Average age (years)	45.1	39.4	15	2020
	Population increase between 2011 and 2020	+6%	+7%	16	2011-2020
Economy	Unemployment	3.5%	5.0%	32	2020
	Homeworkers	25%	16%	38	2020
	Weekly household expenditure ^a	£579.20	£505.50	130	2021/22
	Transport costs	£113.90	£76.20	132	2021/22
	Proportion of households who are fuel poor	12%	14%	143	2020
Transport	% of service users able to access key services within 30 mins by public transport and walking			89	2019
	GP	81%	100%		
	Hospital	6%	40%		
	Food store	89%	100%		
Education	% of pupils leaving school with English and Maths GCSE at grades A*-C or equivalent ^b	70%	64%	152	2018/19
	% of schools which are Ofsted outstanding	18%	22%	161	Up to 2019
Health	Infant mortality rate	4.1/1000	3.0/1000	177	2018

Notes:

a. Excluding mortgage payments

b. Based on residency of pupil, rather than school

Source: Defra, [Statistical Digest of Rural England, 2022](#)

Local Authority Classification (including London)

Note: this table isn't directly comparable with the table on the previous page, because it classifies areas in a different way.

Rural/Urban England: Key statistics

Local Authority Classification (including London), sourced from DEFRA's Statistical Digest of Rural England, 2022

Local Authority Classification - Including London

Theme	Fact	Predominantly rural areas	Predominantly urban areas	Page no. in Digest	Year/s
Economy	Broadband download speed	51 Mbit/s	84 Mbit/s	106	2020
	Premises not able to access decent broadband service ^a	0.9%	0.3%	107	2020
Housing	Housing completions per 1,000 dwellings	8.6	5.3	112	2020/21
Health	Male life expectancy (years)	80.4	78.8	174	2018-2020
	Female life expectancy (years)	83.9	82.7	174	2018-2020

Notes: a. Decent defined as at least 10 Mbit/s download and 1 Mbit/s upload speed

Source: [Statistical Digest of Rural England, 2022](#)

Local Authority Classification (excluding London)

Note: this table isn't directly comparable with the table on the previous page, because it classifies areas in a different way.

Rural/Urban England: Key statistics

Local Authority Classification (excluding London), sourced from DEFRA's Statistical Digest of Rural England, 2022

Local Authority Classification - Excluding London

Theme	Fact	Predominantly rural areas	Predominantly urban areas (excl. London)	Page no. in Digest	Year/s
Economy	Median workplace earnings	£22,900	£25,400	35	2020
	GVA to economy	15%	45%	43	2020
	House prices as a multiple of earnings ^a	9.2	8.0	125	2021
Housing	Proportion of households who are homeless and in priority need of assistance in securing permanent settled accommodation	1.4/1,000	2.5/1,000	128	2017/18
	Proportion of households in temporary accommodation	0.7/1,000	1.8/1,000	128	2017/18

Notes: a. Ratio of lower quartile house prices to lower quartile earnings

Source: [Statistical Digest of Rural England, 2022](#)

3

Digital connectivity in rural areas

Improving digital connectivity is “a fundamental part of the Government’s levelling-up agenda.”¹⁶ Commonly cited benefits include enhanced productivity and employment opportunities from home working, new business opportunities, tackling digital exclusion, and efficiency benefits for public services through online access.¹⁷ A recent study by the National Innovation Centre for Rural Enterprise found that sub-standard broadband quality was a key factor limiting rural businesses’ ability¹⁸ to bounce back from challenges such as the coronavirus pandemic.

Respondents to an inquiry into rural productivity by the APPG for Rural Business and the Rural Powerhouse said that the main impact on better connectivity would be to “give businesses and individuals the freedom to choose where to locate.” The Internet Service Providers Association argued that digital infrastructure could reverse the “brain drain” from rural to urban areas by making it easier to set up and run a business.¹⁹

The Countryside Alliance has noted that enabling remote working could have wider benefits for rural areas:

If we get our digital connectivity right, we will see a renaissance in our rural communities, with more people working from home, using local shops and other services, money will stay in that community, services will grow and rural communities will need less support from government to keep essential services and rural life going.²⁰

This section covers Government targets and funding to support coverage improvements in hard-to-reach areas, primarily through Project Gigabit (broadband) and the Shared Rural Network (mobile).

Telecommunications is a reserved power. The UK Government has primary responsibility for setting broadband policy and coverage targets. However, the delivery of infrastructure projects may involve local and devolved responsibilities and funding.

¹⁶ DCMS Select Committee, [Broadband and the road to 5G](#), Fourth Report of Session 2019–21, HC 153, 22 December 2020, para 16.

¹⁷ Federation of Small Business, [Lost connection: how poor broadband and mobile connectivity hinders small firms](#), October 2019; Curia, [Connecting Cornwall: demonstrating the value of improved connectivity](#), 25 May 2022.

¹⁸ National Innovation Centre for Rural Enterprise, [Poor broadband hinders resilience among rural businesses](#), 13 May 2022.

¹⁹ APPG for Rural Business and the Rural Powerhouse, [Levelling up the rural economy: an inquiry into rural productivity](#), 26 April 2022, p27-28.

²⁰ Countryside Alliance, [Written evidence to the DCMS Select Committee, Broadband and the road to 5G](#), April 2020.

3.1

Broadband connectivity

Rural-urban divide

The table below shows broadband connectivity in UK nations and English regions in May 2022, for rural areas and urban areas.

Rural-urban differences in broadband connectivity						
May 2022 data based on Output Areas						
Nation / Region	Superfast availability			Gigabit availability		
	Rural	Urban	Total	Rural	Urban	Total
England	90%	98%	96%	35%	75%	68%
East Midlands	92%	98%	97%	35%	76%	65%
East of England	93%	98%	97%	34%	73%	62%
London	-	97%	97%	-	80%	80%
North East	91%	98%	96%	36%	75%	67%
North West	89%	98%	97%	35%	72%	68%
South East	90%	98%	96%	40%	72%	66%
South West	87%	97%	93%	35%	70%	58%
West Midlands	88%	98%	96%	32%	78%	71%
Yorkshire & Humber	91%	98%	97%	31%	76%	68%
Scotland	75%	98%	94%	20%	70%	61%
Wales	87%	98%	95%	26%	58%	48%
Northern Ireland	81%	99%	93%	63%	94%	84%
UK	88%	98%	96%	35%	74%	67%

Source: Ofcom, [Connected Nations Autumn 2022](#); Commons Library analysis

In May 2022, gigabit availability in rural areas varied from 20% of premises in Scotland to 63% in Northern Ireland. All English regions had rural availability between 30% and 40% of premises.

Since September 2020, total availability of [gigabit broadband](#) has increased from 27% to 67%. The bulk of this growth has been in urban areas, where availability rose from 29% to 74%. In rural areas, availability rose from 15% to 35%. This is because a large proportion of growth in gigabit availability since 2020 is due to the upgrade of Virgin Media’s cable network, which principally covers urban areas.

In May 2022, 12% of rural premises were still unable to receive [superfast broadband](#) (download speeds of 30 Mbps), down from 15% in September 2020. This proportion varied between regions, from 25% in Scotland to 7% in the East of England.

5% of rural premises were unable to receive download speeds of 10 Mbps from fixed broadband in May 2022 (varying from 12% in Scotland to 2% in the East of England).

Our [constituency dashboard on broadband coverage and speeds](#) allows you to browse data for your area, including postcode-level maps of superfast and gigabit coverage.

This analysis is based on Ofcom's output area data combined with the rural-urban classification of output areas.

Government targets and funding

The Government's target is for gigabit-broadband to be available to 85% of UK premises by 2025 and nationwide by 2030.²¹ A 'gigabit' connection is capable of download speeds of up to 1000 megabits per second, allowing a high-definition film to be download in under one minute. By comparison, 'superfast' broadband (the focus of the previous national rollout) is usually defined as download speeds of 30 megabits per second.

The Government anticipates that private investment alone will deliver gigabit connections to 80% of UK premises. Most of the remaining 20% - the predominantly rural 'hard-to-reach' premises - will require public subsidies.

The 80% of premises that are commercially viable are expected to be reached by 2025. To meet the 2025 target of 85% coverage, the Government will therefore require a minimum of 5% of premises (around 1.56 million) to be reached by its public funding programmes. The 2030 target effectively puts a timeline on extending coverage to the remaining 15%.

The current timescale for rolling out gigabit broadband is slower than was promised in the [Conservative Party's 2019 election manifesto](#), which set a target of nationwide coverage by 2025. The Government explained that this is based on what it believes the industry can deliver in hard-to-reach areas by 2025, alongside commercial deployment plans.²² Commercial deployment is still expected to reach 80% by that date, so the deferred nationwide target primarily affects hard to reach rural areas that will require public funding. Consequently, it has been described by rural stakeholders as a "kick in the teeth."²³ The APPG for Rural Business and the Rural Powerhouse has

²¹ HM Treasury, [National Infrastructure Strategy](#), 25 November 2022, p31; DLUHC, [Levelling Up the United Kingdom](#), 2 February 2022, Table 2.1 page 120.

²² [Correspondence from the Secretary of State for DCMS to Chair of the DCMS Select Committee](#), dated 1 April 2021, in response to the Committee's December 2020 report, Broadband and the Road to 5G (HC 153)

²³ BBC News, [Gigabit broadband: watered-down targets a 'kick in the teeth'](#), 25 November 2020

expressed concern that Government and industry “appear to be focused on the 85% target” and have not considered what comes after 2025.²⁴

Project Gigabit

The £5 billion funding programme to extend gigabit broadband coverage to hard-to-reach areas is called Project Gigabit. Reflecting the staged targets, £1.2 billion – a quarter of the total – has been allocated to 2021-25 with the remaining £3.8 billion reserved for future years.

Project Gigabit is being delivered by Building Digital UK (BDUK), an executive agency within DCMS. It is UK-wide, although in Northern Ireland the rollout is currently largely funded under a pre-existing scheme, [Project Stratum](#).

Project Gigabit has three main parts:

- Contracts to subsidise the roll-out of gigabit-capable broadband in specific areas;
- Voucher schemes for rural areas;
- Funding to connect public sector buildings.²⁵

Funding has also been made available to allow some contracts agreed under the previous superfast broadband rollout scheme to deliver gigabit broadband instead.

The main part of the programme is the series of public procurements in hard-to-reach areas that would not otherwise receive private investment. The Government will part-fund the roll-out in these areas, awarding contracts to operators to top-up their investment and make the build commercially viable.

Procurements are being taken forward in stages. The status of each procurement can be found in the [quarterly Project Gigabit updates](#) published by BDUK. As of the Summer 2022 update, there were 13 ‘live’ procurements worth a total of £690m and covering up to 498,000 uncommercial premises. The first Project Gigabit contract, covering 7,000 premises in north Dorset, was awarded to local provider Wessex Internet in August 2022.²⁶

Progress

BDUK’s [Corporate Plan 2022-23](#) sets out the anticipated trajectory towards the target of 85% gigabit coverage by the end of 2025. Overall, BDUK has reported that the rollout is slightly ahead of target.²⁷

²⁴ APPG for Rural Business and the Rural Powerhouse, [Levelling up the rural economy: an inquiry into rural productivity](#), 26 April 2022, p29.

²⁵ BDUK, [Corporate Plan 2022-23](#), 29 April 2022.

²⁶ BDUK, [Collection: Project Gigabit contracts](#), updated 29 September 2022.

²⁷ BDUK, [Project Gigabit Delivery Plan - summer update 2022](#), 30 August 2022.

In January 2022 the Public Accounts Committee criticised the Government for being “overly reliant” on the commercial rollout in improving gigabit broadband coverage. The Committee said that this “approach to rolling out gigabit risks perpetuating digital inequality across the UK.”²⁸ Analysis of commercial rollout plans by the Financial Times has estimated that by 2030 around 3 million homes in wealthier, densely populated areas could have five fibre broadband providers while 1 million in poorer, rural areas could have none.²⁹

Industry group techUK has said that Project Gigabit has been “frustratingly slow” in identifying which premises will be missed by commercial deployments, although it acknowledged the complexities involved. It called on BDUK to speed up the procurement process and bring forward more procurements “to ensure [hard-to-reach] households are not, once again, left behind.”³⁰

BDUK has said that it hopes to streamline the procurement process as lessons are learned from earlier stages.³¹

3.2

Mobile connectivity

Rural-urban divide

The table below shows May 2022 data for rural and urban mobile connectivity in the four UK nations. The table shows the percentage of premises and A/B roads that can receive coverage from all operators. Data is not available for 5G.

²⁸ Public Accounts Committee, [Delivering gigabit-capable broadband](#), Thirty-second report of session 2021-22, HC 743, 19 January 2022, paras 2 and 5; Guardian, [Boris Johnson’s faster broadband promise is being broken, say MPs](#), 19 January 2022.

²⁹ Financial Times, [Broadband market inequalities test Westminster’s hopes of levelling up](#), 19 June 2022.

³⁰ TechUK, [The FTIR: Fit to deliver for 5G and full fibre four years on?](#), 11 October 2022, p18.

³¹ DCMS, [Project Gigabit – phase one delivery plan](#), March 2021, p14.

Mobile coverage by rural-urban classification, May 2022				
Calculated based on constituency data from Ofcom Connected Nations Autumn 2022				
Country and constituency classification	4G data - coverage from all operators		Voice calls - coverage from all operators	
	Premises (indoors)	A and B roads	Premises (indoors)	A and B roads
England	84%	67%	94%	84%
Mainly Rural	63%	56%	82%	76%
Largely Rural	70%	60%	88%	79%
Urban with Significant Rural	78%	67%	92%	84%
Urban with City and Town	88%	80%	97%	92%
Urban with Minor Conurbation	90%	84%	98%	93%
Urban with Major Conurbation	93%	89%	99%	97%
Northern Ireland	70%	51%	84%	66%
Rural	53%	41%	68%	56%
Mixed Urban & Rural	69%	59%	84%	74%
Urban	81%	66%	92%	79%
Scotland	84%	47%	93%	65%
Rural	56%	31%	75%	51%
Mixed Urban & Rural	76%	50%	88%	67%
Urban	89%	66%	97%	80%
Wales	75%	50%	91%	71%
Mainly Rural	54%	40%	76%	61%
Largely Rural	68%	46%	84%	68%
Urban with Significant Rural	68%	51%	88%	73%
Urban with City and Town	86%	75%	97%	91%
UK	83%	60%	94%	77%

Source: Ofcom, [Connected Nations Autumn 2022](#); Commons Library analysis

[Ofcom publishes this data](#) at constituency level and aggregated based on the [rural-urban classification](#) of constituencies. Because there are different rural-urban classifications for constituencies in Northern Ireland and Scotland compared to England and Wales, the rural-urban categories cannot be directly compared between nations.

Ofcom's [Mobile and broadband checker](#) allows you to see predicted connectivity and maps for local areas for different networks.

Government policy

4G: the Shared Rural Network

The Levelling Up white paper set a target of nationwide 4G coverage by 2030.³²

The Government's main programme for extending rural 4G mobile coverage is the Shared Rural Network (SRN). It was initially proposed by the mobile industry and an [agreement was reached with the Government](#) in March 2020. Under the deal, mobile network operators (MNOs: Three, EE, Vodafone, and O2) will invest £500 million in building shared infrastructure to close partial not-spots (areas which have mobile coverage from at least one but not all MNOs) and the Government will invest £500 million to tackle total not-spots (areas with no coverage).

The SRN is expected to bring 4G coverage to 95% of the UK landmass by 2025. This means 95% of the UK should receive signal from at least one MNO.

The mobile operators have committed to the following legally enforceable [coverage obligations](#):

- Each operator to reach 88 per cent coverage of the UK by 30 June 2024;
- Each operator to reach 90 per cent coverage of the UK by 30 June 2026;
- Each operator to reach nation-specific coverage targets in England, Northern Ireland, Scotland, and Wales by 2026;
- Collectively, operators will provide additional coverage to 280,000 premises and 16,000 km of roads by 2026.

The MNOs have set up a joint venture, Digital Mobile Spectrum Limited, to run the SRN. A [dedicated website](#) provides information, FAQs and progress updates on the SRN. It includes [forecasts](#) of where mobile coverage is likely to improve due to the SRN at a regional level.

Rural stakeholders have welcomed the SRN, calling for the programme to be delivered without delay and for mobile operators to be held to their commitments.³³

³² DLUHC, [Levelling Up the United Kingdom](#), 2 February 2022, 3.2.4.

³³ CLA, [Closing the digital divide](#), 20 May 2021; Local Government Association, [LGA responds to shared rural network announcement](#), 9 March 2020.

5G

The Government has said that the rollout of 5G is “a matter for the industry.”³⁴ It has introduced regulatory reforms to speed up mobile infrastructure deployment, such as changes to permitted development rights in England. These are discussed in the Library briefing, [Building broadband and mobile infrastructure](#) (March 2022).

EE revealed in May 2022 that its 5G network covered 50 per cent of the UK population. This is five years ahead of the Government’s target, although industry commentators noted that it “was always likely to be a fairly easy target to hit.”³⁵ In terms of extending 5G coverage to rural areas, a report by Frontier Economics estimated that there is a funding gap of £3-5 billion between what the mobile industry can realistically invest and what is needed to delivery UK-wide ‘basic’ 5G by 2030.³⁶

The Government has said that it will publish a Wireless Infrastructure Strategy later in 2022. According to the related [call for evidence](#), the Strategy will, among other things, “articulate a clear vision for how wireless infrastructure can become an integral part of the fabric of the UK’s economy by 2030 and make a significant contribution to the government’s growth and levelling up agendas.”

3.3 Further reading

The following Library briefings provide further information on the topics discussed in this section.

[Gigabit-broadband: Funding for rural and hard to reach areas](#), 21 June 2022.

[Gigabit-broadband in the UK: Government targets and policy](#), 25 February 2022.

[Gigabit broadband: how to follow the national roll-out](#), 21 July 2022.

[Rural mobile coverage in the UK: Not-spots and partial not-spots](#), 6 April 2022.

[Building broadband and mobile infrastructure](#), 17 March 2022.

[Constituency data: broadband coverage and speeds](#), 21 October 2022

³⁴ [PQ 45257](#).

³⁵ ISPreview, [EE Become First UK Mobile Operator to Hit 50 Percent 5G Cover](#), 10 May 2022.

³⁶ Frontier Economics, [The investment gap to full 5G rollout](#), 7 September 2022.

4 Press articles

[What Rishi Sunak's Tunbridge Wells boast may mean for levelling up](#)

Robert Booth

The Guardian, 26 October 2022

[Truss is exposing 'levelling up' as the hollow, cynical soundbite it always was](#)

Sarah Longlands

The Guardian, 10 October 2022

[Rural economy to be turbocharged by £110m funding pot, farmers' union says](#)

Malcolm Prior

BBC, 3 September 2022

[Tories have abandoned levelling up, says Labour's Lisa Nandy](#)

BBC, 18 July 2022

[Additional metrics needed to ensure rural levelling up is successful](#)

Dan Benn

Public Sector Executive, 23 June 2022

[Broadband market inequalities test Westminster's hopes of levelling up: Disparity in access to fast internet sets back rural and poorer areas, data analysis shows](#)

Anna Gross and Dan Clark

Financial Times, 22 June 2022

[What is levelling up and how is it going?](#)

BBC, 10 June 2022

[Rural voters are being left out of levelling up](#)

Julian Sturdy, Lord Cameron

The Times, 27 April 2022

[Government neglect of UK countryside stifles productivity, MPs warn](#)

Judith Evans

Financial Times, 27 April 2022

[Will 'levelling up' deliver for rural areas?](#)

Cecilia Motley

Local Government First, 26 April 2022

[Rural areas left out of Treasury's levelling-up cash, report claims: Ministers deliberately made it harder for areas beyond the red wall to get funds according to a new study](#)

Anna Isaac

The Independent, 3 August 2021

5 Parliamentary material

5.1 Oral questions

[Levelling-up Fund](#)

HC Deb 17 October 2022, c 357-60

[Rural Bus Services](#)

HC Deb 30 June 2022, c 435

[Levelling Up](#)

HC Deb 8 June 2022, c 787-88

[Levelling Up Communities](#)

HC Deb 16 March 2022, c 877

5.2 Debates

[Rural Healthcare](#)

HC Deb 12 October 2022, c 137WH-145WH

[Rural Communities: Housing and Planning](#)

HC Deb 20 July 2022, c 1075-82

[UK Shared Prosperity Fund: Rural Areas](#)

HC Deb 11 May 2022, c 253-62

[Rural Communities in Cumbria: Levelling Up](#)

HC Deb 23 February 2022, c 426-34

5.3

Written questions

[Question for Department for Digital, Culture, Media and Sport: Broadband: Rural Areas: UIN HL2272](#)

Asked by Baroness Jones of Whitchurch

Asked on 7 September 2022

To ask Her Majesty's Government what steps they are taking to ensure access to full fibre broadband for all properties and businesses in rural communities.

Answered by Lord Kamall

Answered on 22 September 2022

In March 2021 we launched Project Gigabit, our £5 billion mission to deliver lightning-fast, reliable broadband across the UK. Project Gigabit's objective is to level up the UK by giving hard-to-reach areas access to gigabit-capable internet speeds and, coupled with commercial gigabit delivery, ensuring almost all of the UK has access to gigabit-capable internet as soon as possible.

Our Project Gigabit procurements are prioritising delivery to rural, hard-to-reach premises and to those with the lowest broadband speeds. We have recently signed our first local Project Gigabit contract in North Dorset and expect to award further contracts over the coming months.

Furthermore, up to £210 million is available for Gigabit Broadband Vouchers to support rural communities with the cost of installing new gigabit-capable connections.

Building Digital UK's legacy and current programmes have already upgraded over 740,000 premises to gigabit speeds, and we are continuing to move at pace.

[Question for Department for Levelling Up, Housing and Communities: Housing: Construction: UIN 39921](#)

Asked by Helen Whately

Asked on 19 July 2022

To ask the Secretary of State for Levelling Up, Housing and Communities, what plans he has to ensure that new housing in rural areas comes with necessary improvements to local infrastructure.

Answered by Mr Marcus Jones

Answered on 26 July 2022

The provision of the right infrastructure at the right time is very important to new and existing communities, including those in rural locations. Where infrastructure is required as a result of new development, local planning authorities can require contributions from developers towards that infrastructure. Contributions can be sought through Section 106 agreements and the Community Infrastructure Levy.

To create a more efficient, effective and transparent system, the Levelling Up and Regeneration Bill proposes a new Infrastructure Levy. This will be a mandatory, non-negotiable charge, set and collected locally, to largely replace the complex and discretionary Section 106 regime and CIL charge.

The Bill will require local authorities to prepare infrastructure delivery strategies. These will set out a strategy for delivering local infrastructure through spending Levy proceeds. They will create a more transparent process for local people on how funds will be spent and what infrastructure will be delivered to support development. It will be for local councils to decide which infrastructure projects they spend the proceeds on.

The Levy will be brought forward through regulations that will set out the detail of how it will operate. We intend to consult on this detail, prior to any publication of regulations.

[Question for Department for Environment, Food and Rural Affairs: Productivity: Rural Areas: UIN HL98](#)

Asked by The Lord Bishop of St Albans

Asked on 10 May 2022

To ask Her Majesty's Government what plans they have to close the 18 per cent productivity gap in rural areas.

Answered by Lord Benyon

Answered on 24 May 2022

Latest statistics show rural areas in England contributed over £260 billion to our economy in 2019. There are over half a million businesses registered in rural areas.

There are many successful rural businesses, providing high levels of employment, and vital supply chains. However, we know that productivity in some rural areas has fallen behind other parts of the country.

We are determined to help rural areas fulfil their full economic potential. The Government is committed to helping rural communities and businesses as we level up every region and nation of the UK, boosting productivity and spreading opportunity. We have announced over £2.6 billion through the UK Shared Prosperity Fund (UKSPF).

Defra will set out later this year its plans to replace EU funding for LEADER and the growth programme elements of the Rural Development Programme for England and is working closely with the Department for Levelling Up, Housing and Communities to make sure there are synergies with UKSPF, while reflecting rural needs.

We are already providing funding to put in place the infrastructure that rural areas need to boost their potential. We are investing £5 billion so hard-to-reach areas can get gigabit speeds and have already upgraded 600,000 premises. The Government-led £1 billion Shared Rural Network will also roll out fast and reliable 4G coverage to 95 per cent of UK landmass.

[Question for Department for Environment, Food and Rural Affairs: Rural Areas: Economic Situation: UIN HL100](#)

Asked by The Lord Bishop of St Albans

Asked on 10 May 2022

To ask Her Majesty's Government what assessment they have made of the report by the APPG for Rural Business and Rural Powerhouse Levelling Up the Rural Economy: An Inquiry into rural productivity, published on 27 April.

Answered by Lord Benyon

Answered on 24 May 2022

We welcome this report which highlights some of the key challenges for rural areas.

We are providing funding to put in place the infrastructure that rural areas need. We are investing £5 billion so hard-to-reach areas can get gigabit speeds. Over 67% of UK premises can now access gigabit-capable broadband. The Government-led £1 billion Shared Rural Network will also roll out fast and reliable 4G coverage to 95 per cent of UK landmass.

We are committed to levelling up rural areas, with over £2.6 billion committed nationwide via the UK Shared Prosperity Fund to spread opportunity.

The Government has made a clear commitment to rural proofing. We will publish the second annual Rural Proofing report following our Levelling Up White Paper which will set out the Government's approach to levelling up in rural areas and targeted approaches where needed to develop rural infrastructure services.

[Question for Department for Digital, Culture, Media and Sport: Broadband and Mobile Phones: Rural Areas: UIN 141330](#)

Asked by Matt Vickers

Asked on 16 March 2022

To ask the Secretary of State for Digital, Culture, Media and Sport, what recent steps her Department has taken to help improve broadband and mobile phone coverage in rural areas.

Answered by Julia Lopez

Answered on 22 March 2022

We are investing £5 billion through Project Gigabit to provide reliable, lightning-fast, future-proofed connectivity in areas not covered by commercial delivery. Project Gigabit is central to how we level up, future-proofing connectivity for decades to come and ensuring no-one is left behind.

We have already upgraded 600,000 premises to gigabit-capable broadband, and in three years national gigabit coverage has rocketed from six per cent to 66 per cent.

Procurements under Project Gigabit are now under way in a number of regions across the country to extend this further. Up to 2.5million hard-to-reach premises have been announced as within scope for gigabit procurements and up to £210 million in vouchers is available to help communities that are not in line for commercial or publicly-funded projects right now.

The Government also recognises the frustration arising from the impact poor mobile coverage has on communities, particularly in rural areas. That is why we agreed a deal with the mobile network operators to deliver the Shared Rural Network programme. This agreement will see the government and industry jointly invest over £1 billion to increase 4G mobile coverage to 95% UK geography by the end of the programme. It will improve coverage for an extra 280,000 premises and 16,000km of roads tackling not-spots and reduce the divide in connectivity between urban and rural areas.

The four mobile network operators have already commenced work on the first element of the programme, which is funded by industry, and work is already

under way and on track to eliminate the majority of partial not-spots - areas of the UK where there is currently coverage from at least one, but not all operators - by mid-2024.

5.4 Select Committee reports

[Time for a strategy for the rural economy](#)

House of Lords Select Committee on the Rural Economy, April 2019

5.5 APPG reports

[Levelling up the rural economy: an inquiry into rural productivity](#)

All-Parliamentary Group for Rural Business and the Rural Powerhouse, April 2022.

5.6 Library publications

[Seasonal Worker visas and UK agriculture](#)

November 2022

[The role of homes and buildings in levelling up health and wellbeing](#)

October 2022

[The National Food Strategy and food security](#)

October 2022

[Local growth funds](#)

July 2022

[The effect of the war in Ukraine on UK farming and food production](#)

July 2022

[Support for farmers with the cost of living](#)

July 2022

[Levelling Up and Regeneration Bill 2022-23](#)

June 2022

[Levelling up: What are the Government's proposals?](#)

February 2022

6 Further reading

[Statistical Digest of Rural England](#)

Defra

August 2022

[Are levelling up metrics at odds with rural challenges?](#)

ICAEW

August 2022

[Rural as a region: the hidden challenge for Levelling Up: Assessing the scale of rural disadvantage using the White Paper's analytical framework](#)

Rural Services Network/Pragmatix Advisory

June 2022

[Rural Coalition Response to the Levelling Up White Paper](#)

The Rural Coalition

March 2022

[Will 'Levelling-Up' genuinely reach out to rural areas?](#)

Action with Communities in Rural England

March 2022

[Rural recognition, recovery, resilience and revitalisation](#)

LGA/Pragmatix Advisory

September 2021

[Levelling up rural towns: Why not every rural town can become a Tunbridge Wells: Why investment in rural towns should focus on skills, health and social infrastructure](#)

Centre for Cities

September 2021

[The rural economy and levelling up](#)

NFU/Onward

August 2021

[Levelling up rural Britain](#)

NFU

February 2021

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