

Economic Impact Report 2026



The impact assessment provides quantitative estimates of the very significant impact that NICD has made and continues to make on the North East and wider UK economy, for Newcastle University and for the companies and people that benefit from NICD collaboration, engagement and skills transfer.

The Economic Impact of NICD, Ortus Economic Research Ltd

Foreword

The UK's National Innovation Centre for Data (NICD) was launched 9 years ago in response to pleas for help from companies of all sizes and sectors who were telling us that they were drowning in data — they knew it must be possible to exploit it to transform their company by creating new data-driven products and services, and by gaining new insights so they could make better business decisions. However, they could not realise these opportunities as they lacked the necessary skills in Data Science and AI. Newcastle University had deep expertise in these fields, but a new way was needed to unlock them for the benefit of the wider economy and society.

Funded by the UK Government and Newcastle University, NICD was specifically designed to address this challenge by enabling a team of AI and data science experts to work on impactful, innovative projects with industry and the public sector. In the majority of these, the NICD team collaborates closely with staff from the client, transferring relevant skills to them through the course of the project. The result is that at the end of the project the client does not just have a new data-driven service, or new insights that lead to better business decisions, they also have staff who have been upskilled in AI and data science and so are able to identify and realise new opportunities themselves. The NICD team have now completed over 180 successful projects.

Earlier this year we commissioned an independent report by [Ortus Economic Research Ltd](#) to measure the impact from the first 9 years of NICD and are pleased to present this report to you. The infographics overleaf summarise the significant impact of NICD on the economy of the UK and the North East region. The report shows that NICD has created over 2,000 jobs and will add over £1.2 Billion to the economy over the coming decade.

“NICD Interventions have demonstrated exceptional value for money, with £27.20 in net additional GVA created for every £1 of public funding invested.

This confirms that the innovative NICD approach is highly efficient in enabling organisations of all sizes, across all sectors, to successfully unleash the potential of AI and Data Science. The benefits from NICD will only grow over the coming years as it continues to deliver impactful, transformational projects.

We hope you enjoy reading the full report.

[Paul Watson, Director](#)

[Barry Hodgson, Deputy Director](#)

[Dr Ashmita Randhawa, Director of Policy and Skills](#)

NICD Impact at a Glance



Key outcomes from NICD's contribution to the UK economy and the North East.

570
net jobs created

Collaborations have directly created 570 net equivalent jobs, 467 in the North East alone, enhancing workforce opportunities in the UK.

£141 million in cumulative net additional Gross Value Added (GVA) to the UK economy, projected to rise a further £517m by 2036.

£141m
to 2026
£517m
by 2036



£27.20
for every £1
of public funding

Interventions have demonstrated exceptional value for money, with £27.20 in GVA created for every £1 of public funding invested.

NICD's activities and presence in the North East has attracted major investment in the region, contributing to significant economic growth.

1,584
jobs attracted



£1.2bn
by end-2036

NICD is set to play a major role in delivering economic benefit to the UK through its project-driven activity and investment attraction.

In its lifetime, NICD has upskilled up to 6,600 people.



6,600
people upskilled





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1. Executive Summary

This report estimates the economic impact that NICD creates for both the UK and North East region. It uses monitoring data collected by NICD and a survey of client businesses to assess direct impacts arising from the support that NICD provides through collaborative data skills projects. It also utilises data provided by Newcastle City Council and the North East Mayoral Strategic Authority related to inward investment projects that are associated with NICD's presence as a strategic asset. The analysis is performed in line with HM Treasury guidance set out in the Green Book.

Since its inception in 2018, NICD has made a significant and unique contribution to the UK economy and specifically the economy of the North East of England. It delivers this contribution through three mechanisms: its work to support client businesses in developing and implementing data science skills (via collaborative data science projects), its role as a unique regional asset which serves to attract inward and local investment, and its role as an asset to support wider University research and innovation activities.

The impact assessment study has quantified the economic impacts that NICD has achieved to June 2026, as follows:

- 1,000 direct gross FTE jobs have been created. Once evaluation factors and multipliers have been taken into account, this leads to an estimate that **570 net additional FTE jobs have been created through NICD support by 2026 across the UK**. The impact assessment estimates that **467 of these net additional jobs are located in the North East**.
- In June 2026, NICD's support has generated £77.1m in direct gross GVA for the UK economy. Once evaluation factors and multipliers are taken into account, this leads to an estimate of **£44m in total net additional GVA in 2026, of which £36m was retained in the North East economy**.
- **Cumulative total net GVA (net present value, NPV) between 2018 and 2026 inclusive is estimated at £141m for the UK economy, of which £116m was retained in the North East**.
- The total net projected additional GVA created over NICD's first decade of operation, the 10 year period 2018–2027 inclusive is **£186m to the UK economy, with £153m retained in the North East**.

- The impact estimates forecast that over the coming decade, between 2027 and 2036 inclusive, NICD's cumulative impact could rise to **£517m in total net additional GVA¹ for the UK economy, of which £424m will be retained in the North East**.
- Examining inward investment and NICD's broader 'catalytic' effect, the study estimates that around 1,584 jobs have been attracted through inward investment associated with NICD's activities and presence in the North East with an estimated regional economic benefit of £836m over the next decade (net additional GVA, NPV)².
- Removing double counting between the catalytic effect (£836m) and the attributable impact effect (£517m), **NICD is set to play a major role in delivering an economic benefit to the UK of £1.2bn GVA (NPV) over the coming decade, of which £1.1bn will occur in the North East**. This impact arises from a combination of NICD activities (collaborative projects) and its catalytic effect (investment attraction).
- The return on public investment (**ROI**) for NICD is **27.2:1 i.e. for every £1 of public sector investment, £27.20 of net additional GVA is generated**.
- Across its project portfolio, it is estimated that up to **6,600 staff in client organisations have been upskilled**.

¹ This assumes that the assumed growth rate of jobs driven by client projects and inward investment attraction continues across the coming decade.

² These estimates include the attributable inward investment impacts which are set out in the points above. The estimate serves to demonstrate the broader catalytic effect that NICD has in respect to investment attraction.

The analysis also disaggregates the impact assessment by programme, providing the following key findings:

- The Hartree North East Hub has led to 20 collaborative data science projects, delivering **57 net additional new jobs, which is set to grow to 91 by 2028**. Hartree projects have **added £8.8m to the UK economy** in net additional GVA (NPV) since the centre was established, which is forecast to **total £80.5m over the coming decade** if funding continues.
- The Arrow programme has led to **45** collaborative data science projects and these have led to the creation of **9 net additional new jobs, forecast to rise to 15 by 2028**. Arrow projects have added **£3.3m to the UK economy** in net additional GVA (NPV) since the centre was established, which is forecast to **total £22.3m over the forthcoming decade** if funding continues.
- NICD 'Direct' projects represent the majority of collaborative data science projects in the portfolio, totalling 121 since NICD's inception³. As a result of these projects, beneficiary businesses have **created 504 net additional jobs**, and this is **forecast to grow to 569 by 2028**. Direct projects have **added £128.9m to the UK economy** since NICD was established, which is forecast to rise to total **£414.4m over the forthcoming decade**.

The impact analysis captures the economic benefit that flows from two of the three mechanisms by which NICD delivers impact – namely, data skills projects for external clients, and through attracting local and inward investment to the region. The impact that flows from the third mechanism – supporting the crowding-in of public R&D funding into Newcastle University through its support of and inclusion in funding bids – is more difficult to quantify, because of the significant diversity in nature and scale of bids and the role that NICD plays in those bids, which means that it is not possible to accurately attribute impact back to NICD.

However, between 2018 and 2026, data in relation to bids that NICD has supported and been involved in shows that it has played a key role in attracting over £102m of public research funding to Newcastle University.

The impact assessment provides quantitative estimates of the very significant impact that NICD has made and continues to make on the North East and wider UK economy, for Newcastle University and for the companies and people that benefit from NICD collaboration, engagement and skills transfer.

³ Which includes 3 projects via BridgeAI



2. Introduction

The National Innovation Centre for Data (NICD) was created in 2018 with £30 million of funding from the government and Newcastle University. Based in the state-of-the-art Helix science district in Newcastle, NICD's mission is to transfer data skills to the UK workforce.

NICD was established to play a leading role in addressing skills shortages in relation to data science and analysis, an issue which is seen as a brake on the UK's ability to exploit the rapidly expanding volume and range of data available to organisations. The original concept was to build a new facility which delivers data analytics skills into industry and the public sector by exploiting the knowledge and expertise currently locked within Universities.

NICD's strategic objectives are:

1. To make UK organisations aware of the value of data for business and what is achievable in practice through data innovation
2. To create value from data by delivering highly sought after data analytic skills into the workforce and accelerate the development of new products and services
3. To enable UK organisations to be connected to sources of data expertise through formal and informal networks.

The key mechanism to address skills shortages is a flexible rolling programme of collaborative projects focussed on organisations' specific challenges and opportunities, intended to transfer practical data skills into the workforce of those organisations. These projects are supported by a range of related activities, including awareness raising events, themed business and technical seminars and technical training courses. Engagement with NICD is expected to enable organisations to increase their productivity by optimising their existing operations, and to grow by launching new data-driven products and services. The UK economy and wider society would benefit from this increase in innovation through data. NICD runs collaborative projects directly with clients and also through other programmes such as the North East Hartree Hub, the Arrow Innovation programme⁴, and the Innovate UK programme BridgeAI.

⁴ Now renamed as 'In-TUNE'.

As it has developed and built its reputation and impact, NICD has played a growing role as an asset within the regional economic and innovation ecosystem. Its role as an attractor to investment is therefore an important addition to the benefits that flow from its direct skills transfer work through collaborative projects.

Furthermore, as a part of Newcastle University, NICD plays a key role in supporting and leveraging public R&D funding, across a wide range of subjects and disciplines. Since its inception, it has been asked to support and contribute to a large number of research grant applications, demonstrating an important contribution to University research income.

As it continues to build its reputation and expand its activities, NICD recognises the need to be able to articulate the scale of the economic impact that it has delivered since its inception. Such evidence is important to future funding applications and for a broader set of tasks associated with making the case for investment in NICD's ongoing and developing activities.

2.1 Impact assessment aims and objectives

Since formation, NICD has driven innovation, productivity and skills transfer to businesses and public organisations, from multi-nationals to start-ups, and from Government departments to charities.

NICD has delivered over 180 projects since its inception. Through its engagement with clients, NICD consistently hears evidence of its impact from organisations which have developed new products, services, and processes as a result of working with the NICD team. From data and analysis already collected from projects, NICD understands that many clients increased their headcount, market share and revenues following a collaboration with NICD, which led clients to draw new insights from their existing data, with an upskilled workforce. However, this evidence has not been systematically brought together into a formal impact assessment.

In order to support its future funding application and lobbying work, NICD has commissioned this independent economic impact assessment as a follow up to a similar exercise undertaken in 2024. It has the key aim of producing quantitative evidence of NICD's economic impact across its range of activities in order to describe and value NICD's economic contribution to the North East.

The assessment focuses on three key impact mechanisms, as follows:

- The impact arising from client collaborative data skills projects (disaggregated by client typology – including SMEs, Corporates, Charities and Public Sector Partners)
- NICD's wider economic contribution to the North East, as a critical partner of recent inward investors to the region – quantifying its contribution to crowding-in jobs and private capital to the economy.
- The extent to which NICD has supported the crowding-in of public R&D investment to the North East, through supporting and delivering successful funding bids.

In support of this key aim, the study must also attend to a number of supporting objectives, as follows:

- To identify the economic impact arising through client project delivery.
- Through project delivery, to understand – where data allows – the nature and scale of impact by different client typologies (e.g. SMEs, Corporates, Charities and Public Sector Partners).
- To widen the assessment of economic impact beyond direct projects, to identify NICD's wider contribution to the North East through two key mechanisms:
 - As a critical partner of recent inward investors to the region
 - Through support provided to research and funding applications within the University and beyond, the successful 'crowding-in' of public R&D investment to the North East.
- To articulate the quantitative economic impact in terms of jobs and GVA created, using accepted economic models and based on supportable, rational assumptions.
- To present the impact for the UK and the North East region, and to disaggregate across programmes.
- To generate a short, message-focused impact report which articulates the scale of economic impact generated by NICD.

2.2 Methodology

Whilst the report will focus on economic impact, this project provides the opportunity to add depth and robustness to that analysis. It also allows for a full exploration of impact through the inward investment and R&D funding impact mechanisms. In practice this means additional work to understand the scale and persistence of business and other benefits, generate a number of projections, clarify additionality through a number of consultation interviews and developing a more comprehensive economic model to articulate the full economic impact of NICD. It also presents additional written outputs.

There are five main elements of the methodology, as follows:

- 1. Data collation and analysis**, which has collated all relevant data on client projects and related outputs and outcomes.
- 2. Impact survey**, disseminated by NICD to all past and current project clients. The survey sought to capture data that complements that held by NICD, particularly around the nature and scale of impacts since project completion, and to capture data to support an assessment of the extent to which impacts can be attributed back to the NICD project undertaken. Impact in relation to jobs, financial performance and skills uplift (and related salary impact) was captured by the survey.
- 3. Desk research** and a short consultation exercise, to review all relevant documents, case studies and background information and to discuss attribution with key stakeholders.
- 4. An impact model** was developed which takes into account the following (and follows HM Green Book Treasury guidance);
 - Multipliers to assess indirect and induced impacts which flow from the direct impacts
 - Levels of attribution that can be applied to the impacts and therefore 'claimed' by NICD.
- 5. Reporting.** Finally, the findings and conclusions have been brought together in this impact report which sets out the impact evidence, quantifies NICD impacts and provides a supportive narrative to explain how impacts are derived and to summarise the overall contribution that NICD makes to both the North East and across the UK.



3. Impact assessment findings

The findings of the impact assessment are split to isolate the three main mechanisms by which economic benefits arise:

- Impact arising from collaborative client data skills projects
- Impact arising through inward investment
- Impact arising through leveraging R&D funding

3.1 Impact arising from collaborative client data skills projects

Over the nine years since its inception, NICD has been gathering evidence of the benefits and impacts that arise from the collaborative data skills projects that it delivers with clients. These projects are the central offer of NICD – the unique support that it provides to organisations across the North East and wider UK to develop their own internal skills and capabilities in the field of data science. This model means that the benefits of such projects are retained within the client organisation, leading to sustainable impacts and creating the internal capacity and skills needed to launch further data science projects. Furthermore, as well as the impact felt by the individuals that work collaboratively on the data science projects, clients have commented on the wider benefits that the organisation experiences. For example, the process of designing the data skills project that is to be the focus of the collaboration helps build knowledge and understanding amongst senior managers and executives who are agreeing and signing off on those projects. Their involvement in Discovery Workshops and negotiations around project design help them to learn about the power of data science and how it can be used to achieve a range of organisational objectives.

This impact assessment focuses on the tangible benefits that client organisations have identified as having flowed from their collaboration with NICD. As mentioned earlier, the business benefits often cited include job creation, increased market share, improved productivity and profitability, and innovation to develop new or improved products, services or processes (which themselves might drive tangible business performance benefits).

To end January 2026, NICD has completed 186 collaborative data skills projects, of which 121 were delivered directly (including three via BridgeAI), 20 projects were delivered via Hartree and 45 projects through the Arrow programme. In order to isolate and quantify the business performance benefits that flow from such projects, a short survey was sent to all past clients for which current contacts were available (104 organisations). The survey elicited 21 responses (a 20% response rate) and covered a number of key questions relating to the benefits that have arisen from their data skills projects, and the extent to which they can be attributed to that project. The survey responses were combined with an additional 19 responses received as part of the prior exercise in 2024, to provide a response sample totalling 40 completed questionnaires.

An analysis of the survey data indicates that a total of 200 FTE jobs have been created to date, and that this is forecast to rise by 10 jobs per annum over the coming years. Job numbers are assumed to have grown fairly linearly from an initial estimate of 5 in 2019. Historic data is not available, but the working assumption is that 5 jobs were created in 2020 and the number has grown consistently since then, to 2026. Thereafter, data provided by supported companies through the survey has been used to inform the forecast.

In addition to direct job creation deriving from the projects that NICD has delivered to clients, the impact assessment must also recognise that NICD is an entirely new entity within the University, and its creation has itself led to positive economic impacts. The impact assessment therefore includes the 19 jobs that NICD has created since its inception, plus 2 supported by the Hartree funding. Job numbers are assumed to have grown steadily from 2018 to 2022, from an initial core staff team of 6 people in 2018 to 19 in 2026.

To estimate the economic value of these jobs in GVA terms, the impact assessment uses a benchmark estimate for GVA per job, based on UK Government official statistics⁵ relating to both the digital sector and the economy as a whole. For jobs created through client projects and those created within NICD, the average GVA per employee for the digital sector is used (£106,400 per annum).

In 2026, therefore, through a combination of client projects and via the core NICD team, NICD is responsible for 219 gross direct jobs and £23.5m in gross direct GVA.

Importantly, through its delivery of collaborative projects, NICD has achieved a crucial impact in relation to data science skills and capability. Across its project portfolio, it is estimated that up to 6,600 staff in client organisations have been upskilled.

⁵ See [Digital Sector Economic Estimates 2022 Productivity \(provisional\)](#), GOV.UK

3.2 Impact arising from inward investment

It is clear from qualitative evidence, including comment from inward investor companies and those involved in inward investment promotion, that NICD is an important asset within the North East economy and acts as an important attractor for mobile investment, as demonstrated by the following quote from Jen Hartley, [then] Director at Invest Newcastle:

“The National Innovation Centre for Data plays a key role in attracting companies into the region. Invest Newcastle works closely with the team, to show how the location and its assets will be of benefit to the inward investor, allowing them to work alongside researchers and like-minded companies to understand and work with their data to help them grow in Newcastle.

A prominent example of a recently acquired investment is Leonardo, the defence and security company, which announced in 2023 that it was opening its eighth UK site in Newcastle. Its investment in a new high-technology science and engineering facility at the Helix co-locates it with important partners and collaborators, as demonstrated through the following press statement:

“There are benefits to creating hubs of complementary research and Leonardo's new site will benefit from its location alongside Newcastle University, the UK National Innovation Centre for Data (NICD) and the Defence Science and Technology Laboratories (Dstl) Defence Artificial Intelligence Centre – Experimentation (DAIC-X).⁶

The importance of NICD as an attractor was emphasised by the following statement, made by Leonardo's UK CEO Clive Higgins:

“You [NICD] are the reason we chose Newcastle.

Newcastle City Council and the North East Mayoral Strategic Authority have been especially helpful in providing evidence to support this impact assessment. The data provided included a list of investments made into the North East since 2018. These investments have been allocated into two categories: those where NICD influence was deemed to be significant (based on feedback directly received from the companies involved) and those where NICD influence was deemed to be material but less significant.

⁶ See [New advanced military technology research site to bring over 200 jobs to Newcastle](#), Leonardo

A challenge when undertaking an impact assessment is assessing the level to which an effect (in this case, an investment which creates new economic activity and jobs) can be attributed to an input which contributes to that effect (in this case, the existence of NICD and its skills, capabilities and offer). Typically this is dealt with through an assessment of deadweight, a term used in impact assessment to mean the event where an outcome would have occurred regardless of a particular intervention. Whilst deadweight is accounted for in the overall impact assessment modelling below, it is a particularly important factor in the assessment of inward investment effects that are driven by NICD.

The statement by Leonardo that its presence in Newcastle, and the 200 jobs that they are planning to create here, is down to NICD's presence demonstrates that NICD's influence can be fundamental to large scale inward investment attraction.⁷ On the other hand, projects have come to the North East citing NICD as one of a range of factors influencing their decision.

In order to make an assessment of the extent to which the jobs and economic value which is driven by inward investment can be attributed to NICD, the impact assessment has estimated the number of jobs created by the relevant investments, and then applied a significant discount in order to make a conservative estimate of the attributable impact.

Therefore, the estimates presented below are based on the following assumptions:

- For projects where NICD's influence is considered significant, the impact assessment assumes that **5% of the benefit** is attributable. These projects are deemed to be in activities that are highly associated to the core activities of NICD.
- For all other projects (where NICD's influence is less significant), the impact assessment assumes that **1% of the benefit** can be attributed to NICD.

The data provided by Invest Newcastle indicates that there are 1,584 FTE jobs being created by projects in the first category (with a total economic benefit to the North East of £836m net additional GVA, NPV), and 4,615 in the second category. This means that the estimate of the impact through jobs created by inward investment that are attributable to NICD's presence in the region is 336 FTE jobs to 2026. The trend since NICD inception is assumed to be a straight line for impact assessment purposes, and the data indicates that a further 38 jobs (attributable to NICD) are likely to be created per annum in the future.

⁷ For this reason, jobs and economic value associated with the Leonardo investment are fully attributed to the presence of NICD in the economic impact analysis.

These jobs will be created across a wide range of sectors, from defence to health, government, energy and consultancy. Whilst it may be the case that many of the jobs will be comparatively high value, it is not possible to develop a sophisticated estimate of output per job. For this reason, the average GVA per job across all sectors has been applied (£64,700 GVA per annum⁸).

Via its ability to attract mobile investment to the North East, the impact assessment therefore concludes that NICD is responsible for an additional 336 gross direct jobs and £21.9m in gross direct GVA per annum in 2026.

3.3 Impact arising from research leverage

The third and final mechanism by which NICD generates economic impact is through its role in leveraging in public research funding to Newcastle University. This occurs when NICD is cited within funding applications as being a collaborative resource, a tangible example of an innovative approach taken by the University to transfer skills to industry, or simply as a tangible example of a data science capability that Newcastle University can benefit from.

Table 1 overleaf lists 20 research proposals that NICD has supported or been named within. These projects enable NICD to stay at the forefront of data science and AI and to ensure that its outputs benefit industry and the public sector. The total value of public research grants that NICD has helped leverage is £101.65m. However, unlike the prior impact mechanisms – data skills projects and inward investment attraction – it is exceptionally difficult to estimate the extent to which the value of these grants and the economic activity that they support can be attributed to NICD. For this reason, the research grant leverage mechanism does not contribute to the overall estimates of economic impact set out in Table 1. Instead, it is recommended that the value of research grants leveraged is simply stated at the (rounded) estimated level of £102m.

⁸ See [Statistical Digest of Rural England, GOV.UK](#)

Table 1: Successful Research Proposals supported by NICD

Proposal Name	Value (£)
National Institute for Health and Care Research Innovation Observatory	£22,000,000
National Edge AI Hub	£5,200,000
IAA ESRC Grant	£1,250,000
NorthFutures (Digital Health Hub)	£4,000,000
NU InsightsNE Research bid	£5,500,000
NU Office for Students, National Data Strategy Pilot (Foundational Data Skills for Undergrads)	£60,000
NU NIHR Biomedical Research Centre	£23,132,410
AI Multiply	£24,500
AHSN: TSET (Technology Evaluation Team Selection)	unknown
NU Digital Economy - Centre for Digital Citizens	£8,500,000
NU Institute for Coding	£1,000,000
NU HUBCAP	£400,000
NU Supergen Energy Storage Network	£1,000,000
NU Widening Participation for Data Science MSc	£500,000
NU HFCE Skills Shortage	£150,000
Kinewell TIGGOR Research Funding	£246,000
NICRE Research	£3,700,000
EPSRC Torus Digital Health (£7.2M to Bristol and Newcastle)	£7,200,000
AHRC Creative Industries and policy Evidence Centre (£11M)	£11,000,000
ESRC Imagery Data Service (Imago) (£7M between Liverpool and Newcastle)	£6,788,643
Total	101,651,553

Source: NICD

3.4 Economic impact modelling

HM Treasury Green Book⁹ – the key guidance to undertaking an economic impact assessment – requires that a number of factors are taken into consideration when estimating economic impact of a publicly funded intervention. The first is the 'gross to net' calculation, which takes into account a number of factors related to where and how the impacts are felt across the wider economy. By taking certain factors into account – substitution, deadweight, displacement and leakage – an estimate of the attributable economic impact can be made.

The second recognises that growth in one company, sector or location can lead to economic benefits in other companies, sectors or locations. There are two main mechanisms:

- Indirect effects, which are benefits felt in the supply chain of companies experiencing a direct benefit from an intervention. As they grow, they spend more with suppliers in purchasing inputs.
- Induced effects, which are benefits felt in the wider economy as a result of the discretionary expenditure from wages paid to employees in the companies that are experiencing the direct benefit from the intervention. As new jobs are created, so the overall level of discretionary spend generated by that company also grows, meaning more money is spent in local shops, on local services and so on.

The mechanism by which the scale of indirect and induced effects are estimated is through the application of economic multipliers. These are taken from official sources¹⁰ for the Computer Services sector, and are as follows:

- Indirect multiplier: 1.3
- Induced multiplier: 1.6

⁹ See The Green Book, GOV.UK

¹⁰ Supply, Use and Input-Output Tables, 1998-2022, Scottish Government

Key assumptions regarding the calculation of gross-to-net estimates are as follows:

- Based on survey feedback regarding the extent to which impact would have arisen without support from NICD, deadweight is set at 40%.
- Given the location of the businesses supported by NICD, leakage (from the North East, for the purposes of assessing regional impact) is set at 18%¹¹. This is based on an analysis of the distribution of projects and their value, whilst also considering the related data on impacts (e.g. drawn from the survey). All impacts are assumed to be located within the UK, even where companies are multi-nationals.
- Given the nature of economic impacts and jobs created, and the unique nature of NICD's offer, substitution is set at 5%.

Note on timetable: Newcastle University received the funding award that led to NICD in 2017, and began to build the NICD team. As Table 2 sets out, early data skills projects commenced late in 2017 (2 projects) and continued through 2018 at a small scale (a further 2). Because of the scale of this project activity, and the nature of the organisation at the time (e.g. size, capacity), it is assumed in the impact analysis that economic benefit of these early projects falls no earlier than 2019. Impact arising from inward investment is assumed to fall no earlier than 2019, also. However, the impact emanating directly from the early, small NICD team is counted for 2018. Analysis of the first 10 years therefore covers the period 2018 to 2027 inclusive.

¹¹ Note this figure is used for all impacts, whether arising from collaborative projects or inward investment. When deciding on the estimate, the fact that inward investment projects land fully in the North East was taken into account.

Table 2: Project commencements by year

Year	Project commencements	%
2017	2	1%
2018	2	1%
2019	22	12%
2020	26	14%
2021	28	15%
2022	26	14%
2023	20	11%
2024	41	22%
2025	16	9%
2026*	3	2%
Total	186	100%

Source: NICD data
* To end January 2026

3.4.1 Impact estimates

The analysis in this report has been conducted in a way that allows for two types of disaggregation to be presented:

- Economic impact for the whole UK economy and for the North East economy within that
- Economic impact of collaborative projects across the three main programmes – NICD 'direct', Arrow and Hartree.

3.4.1.1 Economic impact for the UK and North East

The UK-level impact calculations and modelling is set out in Table 4 to Table 7. In summary, the analysis generates the following estimates of NICD's economic impact for the year 2026 at the UK level:

- 1,000 direct gross FTE jobs have been created in the UK. Once evaluation factors and multipliers have been taken into account, this leads to an estimate of **570 net additional FTE jobs have been created through NICD support in 2026 across the UK.**
- In 2026, NICD's support has generated £77.1m in direct gross GVA for the UK economy. Once evaluation factors and multipliers are taken into account, this leads to an estimate of **£44m in total net additional GVA in 2026.**
- **Cumulative total net GVA (net present value, NPV) between 2018 and 2026 inclusive is estimated at £141m for the UK economy.**
- The total net estimated additional GVA created over NICD's first decade of operation, the 10 year period 2018–2027 inclusive is **£186m to the UK economy.**
- The impact estimates forecast that over the coming decade, between 2027 and 2036 inclusive, NICD's cumulative impact could rise to **£517m in total net additional GVA¹² for the UK economy.**

The North East regional impact calculations and modelling is set out in Tables 8 and 9.¹³ In summary, the analysis generates the following estimates of NICD's economic impact for the year 2026 at the North East level:

- 1,000 direct gross FTE jobs have been created in the UK. Once evaluation factors and multipliers have been taken into account, this leads to an estimate that **467 net additional FTE jobs have been created through NICD support in 2026 across the North East.**
- In 2026, NICD's support has generated £77.1m in direct gross GVA across the UK. Once evaluation factors and multipliers are taken into account, this leads to an estimate of **£36m in total net additional GVA in 2026 for the North East economy.**

¹²This assumes that the growth rate of jobs driven by client projects and inward investment attraction continues across the coming decade.

¹³'Gross' impact figures, before adjustment for regional 'leakage' (impacts occurring outside the region), are shown in Tables 4 and 5.

- **Cumulative total net GVA (net present value, NPV) between 2018 and 2026 inclusive is estimated at £116m for the North East economy.**
- The total net estimated additional GVA created over NICD's first decade of operation, the 10-year period 2018–2027, inclusive is **£153m to the North East economy.**
- The impact estimates forecast that over the coming decade, between 2027 and 2036 inclusive, NICD's cumulative impact could rise to **£424m in total net additional GVA¹⁴ for the North East economy.**

3.4.1.2 Economic impact by programme

This section sets out an assessment of the economic impact arising from specific programmes – namely, NICD 'Direct' projects¹⁵, Arrow and Hartree. Table 3 sets out the analysis of the UK economic impact by each of the three programmes, and provides the following key findings:

- The Hartree North East Hub has led to 20 collaborative data science projects. As a result of these projects, beneficiary businesses have created 57 net additional jobs, and this is forecast to grow to 91 by 2028. Hartree projects have added £8.8m to the UK economy since the centre was established. This is forecast to grow over coming years as projects begin to deliver commercial benefits. The total net additional economic benefit of these projects is forecast to total £80.5m over the forthcoming decade if funding continues.
- The Arrow programme has led to 45 collaborative data science projects since its inception in 2019. Many of the clients for these projects are small, early-stage companies. As a result of these projects, beneficiary businesses have created 9 net additional jobs, and this is forecast to grow to 15 by 2028. Arrow projects have added £3.3m to the UK economy since the centre was established. This is expected to grow over coming years as projects begin to deliver commercial benefits. The total net additional economic benefit of these projects is forecast to total £22.3m over the forthcoming decade¹⁶.

¹⁴This assumes that the growth rate of jobs driven by client projects and inward investment attraction continues across the coming decade.

¹⁵Including the three BridgeAI projects.

¹⁶Assuming the programme continues.

- NICD 'Direct' projects represent the majority of collaborative data science projects in the portfolio, totalling 121 since NICD's inception in 2018. As a result of these projects, beneficiary businesses have created 504 net additional jobs, and this is forecast to grow to 569 by 2028. Direct projects have added £128.9m to the UK economy since NICD was established. This is expected to increase over coming years as projects begin to deliver commercial benefits. The total net additional economic benefit of these projects is forecast to total £414.4m over the forthcoming decade assuming the programme continues.

Table 3: Economic impact across the UK by programme

	Hartree	Arrow	NICD Direct	Total
Total additional net jobs	57	9	504	570
Forecast net additional jobs next 2 years	34	6	66	106
Forecast net additional jobs in 2028	91	15	569	676
Proportion	13%	2%	84%	
Total net additional GVA per annum in 2026 (£000)	£6,057	£985	£36,957	£43,999
Forecast net additional GVA p.a. in next 2 years (£000)	£2,981	£545	£3,618	£7,144
Forecast net additional GVA p.a. in 2028 (NPV) (£000)	£9,038	£1,530	£40,575	£51,143
Cumulative net additional GVA created to 2026 (NPV) (£000)	£8,812	£3,332	£128,884	£141,028
Forecast net additional GVA over next 10 years (NPV) (£000)	£80,532	£22,271	£414,410	£517,213

Source: OER Estimates. Note – figures may not sum due to rounding



Impact assessment findings

Table 4: Direct economic impact estimates across the UK – 2018-2028

Impact element	2018	2019	2020	2021
Impact - data skills projects				
Jobs created estimate			5	8
GVA generated estimate			£532,000	£851,000
Impact - NICD team				
Jobs created	6	10	12	15
GVA generated	£638,400	£1,064,000	£1,276,800	£1,596,000
Impact – inward investment				
Inward investment jobs by year		3	27	20
Inward investment jobs cumulative		3	30	50
GVA through inward investment		£168,000	£1,680,000	£2,800,000
Total direct jobs created (FTE)	6	13	47	73
Total direct GVA	£638,000	£1,232,000	£3,489,000	£5,247,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

2022	2023	2024	2025	2026	2027	2028
14	22	143	172	200	210	220
£1,490,000	£2,341,000	£15,223,000	£18,268,000	£21,313,000	£22,377,000	£23,441,000
17	17	17	17	19	20	21
£1,808,800	£1,808,800	£2,021,600	£2,021,600	£2,234,400	£2,340,800	£2,447,200
17	35	25	55	123	38	38
67	102	127	182	305	343	381
£3,752,000	£5,712,000	£7,112,000	£10,192,000	£17,080,000	£19,208,000	£21,336,000
98	141	289	373	526	575	624
£7,051,000	£9,862,000	£24,357,000	£30,482,000	£40,627,000	£43,926,000	£47,224,000

Impact assessment findings

Table 5: Direct to total impact calculations for the UK – 2018-2028

Impact element	2018	2019	2020	2021
Total direct jobs created (FTE)	6	13	47	73
Total direct GVA	£638,000	£1,232,000	£3,489,000	£5,247,000
Multipliers				
Type I - indirect	1.3	1.3	1.3	1.3
Type II - induced	1.6	1.6	1.6	1.6
indirect jobs	1.8	4	14	22
indirect GVA	£191,000	£370,000	£1,047,000	£1,574,000
induced jobs	4	8	28	44
induced GVA	£382,800	£739,200	£2,093,400	£3,148,200
Gross Total jobs	11	25	89	139
Gross Total GVA	£1,212,000	£2,341,000	£6,629,000	£9,969,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

2022	2023	2024	2025	2026	2027	2028
98	141	289	373	526	575	624
£7,051,000	£9,862,000	£24,357,000	£30,482,000	£40,627,000	£43,926,000	£47,224,000
1.3	1.3	1.3	1.3	1.3	1.3	1.3
1.6	1.6	1.6	1.6	1.6	1.6	1.6
29	42	87	112	158	173	187
£2,115,000	£2,959,000	£7,307,000	£9,145,000	£12,188,000	£13,178,000	£14,167,000
59	85	173	224	316	345	375
£4,230,600	£5,917,200	£14,614,200	£18,289,200	£24,376,200	£26,355,600	£28,334,400
186	268	549	708	1,000	1,093	1,186
£13,397,000	£18,738,000	£46,278,000	£57,916,000	£77,191,000	£83,460,000	£89,725,000

Impact assessment findings

Table 6: Gross to net impact calculations for the UK – 2018-2028

Impact element	2018	2019	2020	2021
Gross Total jobs	11	25	89	139
Gross Total GVA	£1,212,000	£2,341,000	£6,629,000	£9,969,000
Deadweight	0.4	0.4	0.4	0.4
jobs lost to deadweight	5	10	36	55
total jobs less deadweight	7	15	54	83
GVA lost to deadweight	£485,000	£936,000	£2,652,000	£3,988,000
total GVA less deadweight	£727,000	£1,405,000	£3,977,000	£5,981,000
Leakage	0	0	0	0
jobs lost to leakage	0	0	0	0
total less leakage	7	15	54	83
GVA lost to leakage	£0	£0	£0	£0
total GVA less leakage	£727,000	£1,405,000	£3,977,000	£5,981,000
Substitution	0.05	0.05	0.05	0.05
jobs lost to substitution	0	1	3	4
Net total jobs	6	14	51	79
GVA lost to substitution	£36,000	£70,000	£199,000	£299,000
Total net additional GVA	£691,000	£1,335,000	£3,778,000	£5,682,000
Total net additional GVA (NPV)	£910,000	£1,698,000	£4,644,000	£6,748,000
Cumulative total net GVA (NPV)	£910,000	£2,608,000	£7,252,000	£14,000,000

2022	2023	2024	2025	2026	2027	2028
186	268	549	708	1,000	1,093	1,186
£13,397,000	£18,738,000	£46,278,000	£57,916,000	£77,191,000	£83,460,000	£89,725,000
0.4	0.4	0.4	0.4	0.4	0.4	0.4
74	107	220	283	400	437	474
112	161	330	425	600	656	712
£5,359,000	£7,495,000	£18,511,000	£23,166,000	£30,876,000	£33,384,000	£35,890,000
£8,038,000	£11,243,000	£27,767,000	£34,750,000	£46,315,000	£50,076,000	£53,835,000
0	0	0	0	0	0	0
0	0	0	0	0	0	0
112	161	330	425	600	656	712
£0	£0	£0	£0	£0	£0	£0
£8,038,000	£11,243,000	£27,767,000	£34,750,000	£46,315,000	£50,076,000	£53,835,000
0.05	0.05	0.05	0.05	0.05	0.05	0.05
6	8	16	21	30	33	36
106	153	313	404	570	623	676
£402,000	£562,000	£1,388,000	£1,738,000	£2,316,000	£2,504,000	£2,692,000
£7,636,000	£10,681,000	£26,379,000	£33,012,000	£43,999,000	£47,572,000	£51,143,000
£8,762,000	£11,842,000	£28,258,000	£34,167,000	£43,999,000	£45,907,000	£47,626,000
£22,762,000	£34,604,000	£62,862,000	£97,029,000	£141,028,000	£186,935,000	£234,561,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

Impact assessment findings

Table 7: Forecast gross and net additional impacts for the UK – 2026-2036

Impact element	2026	2027	2028	2029
Gross Impact - data skills projects				
Jobs created estimate - grossed	210	220	230	240
GVA generated estimate	£22,377,000	£23,441,000	£24,505,000	£25,569,000
Gross Impact - NICD team				
Jobs created	19	20	21	22
GVA generated	£2,234,400	£2,340,800	£2,447,200	£2,553,600
Gross Impact – Inward investment				
Inward investment jobs by year	123	38	38	38
Inward investment jobs cumulative	305	343	381	419
GVA through inward investment	£17,080,000	£19,208,000	£21,336,000	£23,464,000
Total direct jobs	1,000	1,093	1,186	1,279
Total direct GVA	£77,191,000	£83,460,000	£89,725,000	£95,994,000
Total net additional jobs	570	610	650	690
Total net additional GVA	£43,999,000	£47,572,000	£51,143,000	£54,716,000
Total net additional GVA (NPV)	£43,999,000	£45,907,000	£47,626,000	£49,170,000
Cumulative total net GVA (NPV)	£141,028,000	£186,935,000	£234,561,000	£283,731,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

2030	2031	2032	2033	2034	2035	2036
250	260	270	280	290	300	210
£26,633,000	£27,697,000	£28,761,000	£29,825,000	£30,889,000	£31,953,000	£22,377,000
23	24	25	26	27	28	28
£2,660,000	£2,766,400	£2,872,800	£2,979,200	£3,085,600	£3,192,000	£3,192,000
38	38	38	38	38	38	38
457	495	533	571	609	647	685
£25,592,000	£27,720,000	£29,848,000	£31,976,000	£34,104,000	£36,232,000	£38,360,000
1,372	1,465	1,559	1,652	1,745	1,838	1,929
£102,260,000	£108,526,000	£114,794,000	£121,061,000	£127,329,000	£133,595,000	£139,660,000
730	770	810	850	891	931	971
£58,288,000	£61,860,000	£65,432,000	£69,005,000	£72,577,000	£76,149,000	£79,606,000
£50,546,000	£51,766,000	£52,839,000	£53,774,000	£54,578,000	£55,260,000	£55,747,000
£334,277,000	£386,043,000	£438,882,000	£492,656,000	£547,234,000	£602,494,000	£658,241,000

Impact assessment findings

Table 8: Gross to net impact calculations for the North East – 2018-2028

Impact element	2018	2019	2020	2021
Gross Total jobs	11	25	89	139
Gross Total GVA	£1,212,000	£2,341,000	£6,629,000	£9,969,000
Deadweight	0.4	0.4	0.4	0.4
jobs lost to deadweight	5	10	36	55
total jobs less deadweight	7	15	54	83
GVA lost to deadweight	£485,000	£936,000	£2,652,000	£3,988,000
total GVA less deadweight	£727,000	£1,405,000	£3,977,000	£5,981,000
Leakage	0.18	0.18	0.18	0.18
jobs lost to leakage	1	3	10	15
total less leakage	6	12	44	68
GVA lost to leakage	£131,000	£253,000	£716,000	£1,077,000
total GVA less leakage	£596,000	£1,152,000	£3,261,000	£4,904,000
Substitution	0.05	0.05	0.05	0.05
jobs lost to substitution	0	1	2	3
Net total jobs	5	12	42	65
GVA lost to substitution	£30,000	£58,000	£163,000	£245,000
Total net additional GVA	£566,000	£1,094,000	£3,098,000	£4,659,000
Total net additional GVA (NPV)	£745,000	£1,392,000	£3,808,000	£5,533,000
Cumulative total net GVA (NPV)	£745,000	£2,137,000	£5,945,000	£11,478,000

2022	2023	2024	2025	2026	2027	2028
186	268	549	708	1,000	1,093	1,186
£13,397,000	£18,738,000	£46,278,000	£57,916,000	£77,191,000	£83,460,000	£89,725,000
0.4	0.4	0.4	0.4	0.4	0.4	0.4
74	107	220	283	400	437	474
112	161	330	425	600	656	712
£5,359,000	£7,495,000	£18,511,000	£23,166,000	£30,876,000	£33,384,000	£35,890,000
£8,038,000	£11,243,000	£27,767,000	£34,750,000	£46,315,000	£50,076,000	£53,835,000
0.18	0.18	0.18	0.18	0.18	0.18	0.18
20	29	59	76	108	118	128
92	132	270	348	492	538	584
£1,447,000	£2,024,000	£4,998,000	£6,255,000	£8,337,000	£9,014,000	£9,690,000
£6,591,000	£9,219,000	£22,769,000	£28,495,000	£37,978,000	£41,062,000	£44,145,000
0.05	0.05	0.05	0.05	0.05	0.05	0.05
5	7	14	17	25	27	29
87	125	257	331	467	511	554
£330,000	£461,000	£1,138,000	£1,425,000	£1,899,000	£2,053,000	£2,207,000
£6,261,000	£8,758,000	£21,631,000	£27,070,000	£36,079,000	£39,009,000	£41,938,000
£7,185,000	£9,710,000	£23,172,000	£28,017,000	£36,079,000	£37,644,000	£39,054,000
£18,663,000	£28,373,000	£51,545,000	£79,562,000	£115,641,000	£153,285,000	£192,339,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

Impact assessment findings

Table 9: Forecast gross and net additional impacts for the North East – 2026-2036

Impact element	2026	2027	2028	2029
Gross Impact - data skills projects				
Jobs created estimate - grossed	210	220	230	240
GVA generated estimate	£22,377,000	£23,441,000	£24,505,000	£25,569,000
Gross Impact - NICD team				
Jobs created	19	20	21	22
GVA generated	£2,234,400	£2,340,800	£2,447,200	£2,553,600
Gross Impact – Inward investment				
Inward investment jobs by year	123	38	38	38
Inward investment jobs cumulative	305	343	381	419
GVA through inward investment	£17,080,000	£19,208,000	£21,336,000	£23,464,000
Total direct jobs	1,000	1,093	1,186	1,279
Total direct GVA	£77,191,000	£83,460,000	£89,725,000	£95,994,000
Total net additional jobs	467	511	554	598
Total net additional GVA	£36,079,000	£39,009,000	£41,938,000	£44,868,000
Total net additional GVA (NPV)	£36,079,000	£37,644,000	£39,054,000	£40,320,000
Cumulative total net GVA (NPV)	£115,641,000	£153,285,000	£192,339,000	£232,659,000

2030	2031	2032	2033	2034	2035	2036
250	260	270	280	290	300	210
£26,633,000	£27,697,000	£28,761,000	£29,825,000	£30,889,000	£31,953,000	£22,377,000
23	24	25	26	27	28	28
£2,660,000	£2,766,400	£2,872,800	£2,979,200	£3,085,600	£3,192,000	£3,192,000
38	38	38	38	38	38	38
457	495	533	571	609	647	685
£25,592,000	£27,720,000	£29,848,000	£31,976,000	£34,104,000	£36,232,000	£38,360,000
1,372	1,465	1,559	1,652	1,745	1,838	1,929
£102,260,000	£108,526,000	£114,794,000	£121,061,000	£127,329,000	£133,595,000	£139,660,000
641	685	728	772	816	859	902
£47,796,000	£50,725,000	£53,654,000	£56,584,000	£59,514,000	£62,443,000	£65,277,000
£41,448,000	£42,448,000	£43,328,000	£44,095,000	£44,755,000	£45,314,000	£45,712,000
£274,107,000	£316,555,000	£359,883,000	£403,978,000	£448,733,000	£494,047,000	£539,759,000

Source: OER Estimates. Note – current year highlighted green, forecast years highlighted blue

3.5 Value for money

It is good practice to measure the value for money of public sector investment in terms of:

- Cost effectiveness as measured by costs per net outputs, and
- The return on investment (ROI).

3.5.1 Cost effectiveness

To estimate the cost effectiveness of the project, the cost per net job created has been calculated by dividing the total public sector expenditure defrayed by June 2026 (£6,884,600) by the number of net additional jobs that have been created (570).

Table 10: Cost per net output

Measure	NICD cost per net job created	Average of RDA business development and competitiveness interventions
Cost per outcome	£12,078	£27,226

Source: OER Estimates. Note: RDA data from 'Impact of RDA Spending. BIS (2008)'. Figure is adjusted for inflation to 2024 prices

This shows that NICD compares well with an average for similar interventions (although the figures are dated and therefore adjusted for inflation). It is also important to recognise the unique nature of the support provided by NICD, and that impacts are scaling quickly at present as the benefits of working with NICD trickle down into company performance benefits, and as inward investment projects also scale as the North East's capability around data science grows.

This analysis is likely to marginally overstate the true cost per net job created by NICD because the total number of jobs created (1,000 FTEs gross, 570 net) is based on information provided by a sample which is skewed towards smaller clients. It is likely that some of the non-responders will also have created jobs and potentially at a greater scale. This would have the effect of increasing the total number of jobs created and reducing the cost per job created.

3.5.2 Return on investment

In accordance with government guidance, the return on investment (ROI) delivered by NICD is estimated based on the net additional GVA impact (including persistent benefits) (£187m) divided by the total public sector expenditure defrayed by the end of June 2026 (£6,884,600).

The final outturn in terms of return on investment is 27.2:1 i.e. for every £1 of public sector investment, £27.20 of net additional GVA is generated.



£27.20
for every £1
of public funding

3.6 Economic impacts by client typology

The brief requires the economic impact assessment to provide estimates of impact for different client typologies: SMEs, public/charity and corporate. However, generating robust estimates is challenging given the small sample size of impact data derived from the survey. That said, the impact assessment has collected data that allows impact to be disaggregated in order to provide some indicative estimates.

Qualitative evidence gathered as part of the longitudinal evaluation of NICD and the evaluation of the NTCA funding suggests that direct economic impacts are most likely to be generated in corporate clients and SMEs, whilst public sector and charity clients tend to internalise the benefits. For example, the NHS England project led to the development of internal AI tools, which in turn led to a programme of training to roll this out across the organisation. Another example is the project for West End Food Bank, which helped them use data to focus their offer and create efficiencies in food distribution.

There is some crossover however, where both the data skills projects and inward investment overlap; for example, in the collaborative data skills project support provided to DSTL after they established a new office in the Catalyst.

It is also important to recognise that a proportion of NICD's client list was sourced through the Arrow Innovation Programme, which focused on small, often early stage or pre-start businesses. Such businesses are perhaps the least likely to report impacts in relation to job growth, since the commercialisation of their product or service is either in the very early stages, or has yet to commence, meaning they are both less likely to have the resources to scale up their data science capability, and are also less likely to see growth through commercial activities.

The estimates below relate to the data skills project and NICD team elements of impact only, as these are directly linked to project delivery (whereas inward investment impact and research funding leverage are not).

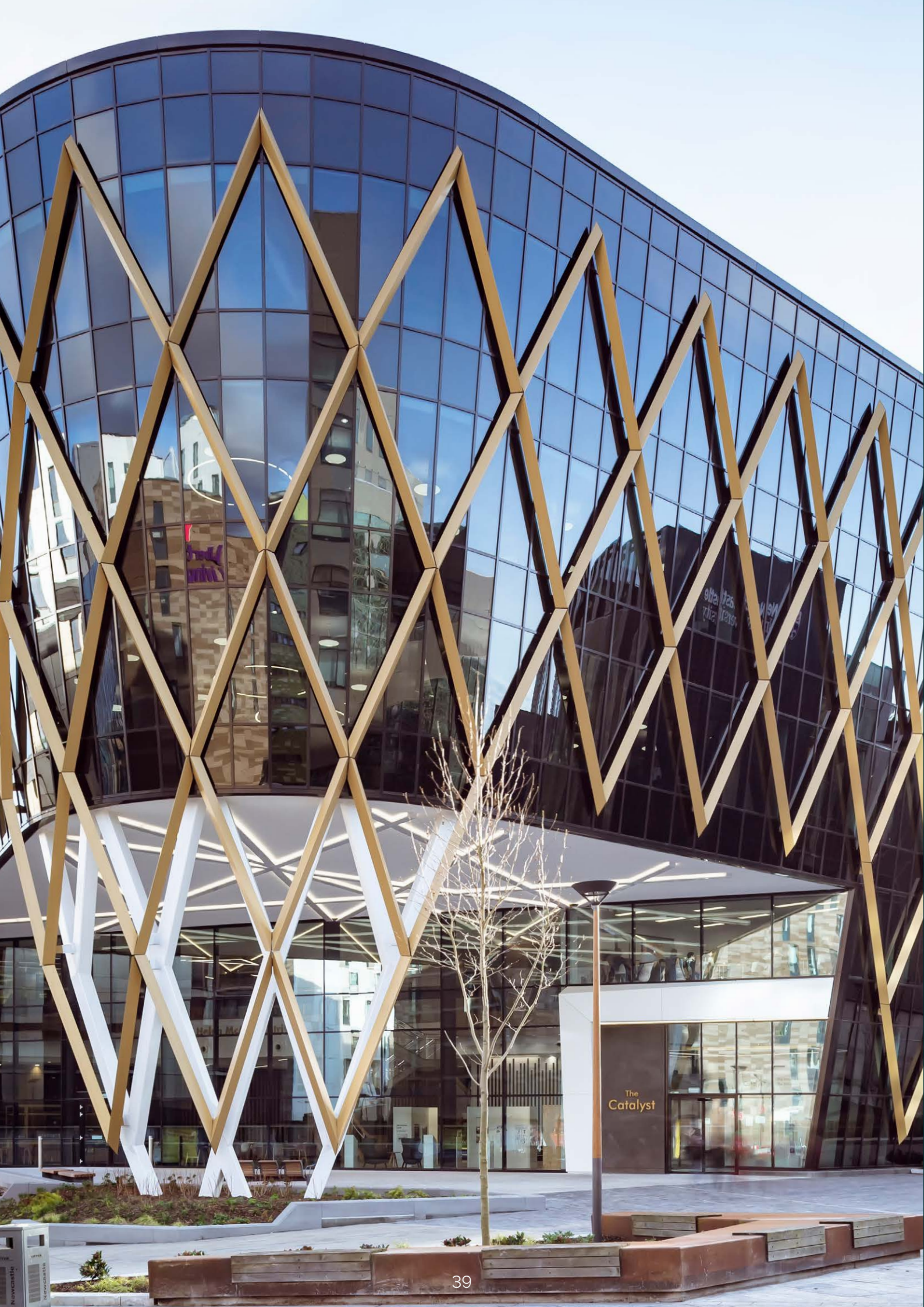
The data available to the impact assessment, both through the survey and monitoring data, suggests that the impacts should be split as follows: 20% to SMEs and 80% to Corporates. When this split is applied, as shown in Table 11, the impact assessment estimates that 114 net additional jobs have been created in SMEs and in 2026 this generated additional GVA worth £8.8m to the UK economy, whilst the cumulative total for SMEs from 2018 to 2026 is £28.2m.

For corporate clients, engagement with NICD has led to the creation of 456 net additional new jobs leading to £35.2m in net additional GVA being added to the UK economy in 2026. The cumulative total for corporate clients from 2018 to 2026 is £112.8m.

Table 11: SME and Corporate client economic impact

Impact element	Value (2026)
Total net additional jobs	
SMEs	114
Corporates	456
Total net additional GVA	
SMEs	£8,799,800
Corporates	£35,199,200
Cumulative total net GVA (NPV)	
SMEs	£28,205,600
Corporates	£112,822,400

Source: OER Estimates.



“

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