

# UK INTERNAL MARKET: DATA STRATEGY UPDATE AND RESEARCH PRIORITIES

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OIM16

Office for the Internal Market



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# 1. INTRODUCTION

- 1.1 This is the Office for the Internal Market's (OIM's) second update to its Data Strategy Roadmap.<sup>1</sup> This update covers developments since May 2024. The OIM's role is to assist the four governments across the UK by applying economic and other technical expertise to support the effective operation of the UK internal market. The OIM has a statutory duty under the UK Internal Market Act (2020) to monitor and report on the operation of the internal market in the UK. The OIM's Data Strategy underpins that function.
- 1.2 A more detailed understanding of how the UK internal market operates helps us to carry out our advisory functions and can support informed decision-making in both government and the private sector. Good quality data on trade within the UK (intra-UK trade) helps to build a picture of how effectively the UK internal market is operating over time,<sup>2</sup> enabling analysts and policy makers to identify and monitor trends. The OIM publishes an annual report setting out how we assess the effectiveness of the UK internal market, and it is important that we address gaps and limitations in the evidence base.
- 1.3 The new data sources and innovative analysis already being produced by our partners in the data community will help deepen our understanding of the UK internal market. We value these relationships and we will continue to work with ONS, the devolved governments and others in 2025-26 to make effective use of existing data products in our reporting. Our priorities for new analysis and research are driven by a focus on economic interactions between the UK nations and regions at a more granular level, to enable us to better understand what may be changing for particular industries.
- 1.4 In the [OIM data strategy roadmap update 2024](#) we reported updates on:
- (a) trade data published by the Scottish Government, Welsh Government and the Northern Ireland Statistics and Research Agency (NISRA);
  - (b) progress made by the ONS in developing a [methodology for the production of interregional trade estimates for the UK](#), and the ONS' [experimental data on industry-to-industry payment flows in the UK from 2016 to 2023](#);

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<sup>1</sup> In March 2023, we published our [Data Strategy Roadmap](#) with the aim of seeking to promote the collection and publication of consistent data on trade within the UK and, more generally, to be a catalyst for an improvement in the evidence base on the UK internal market. The Roadmap sets out the initiatives we are aware of that are being undertaken (by the Office for National Statistics (ONS), the Devolved Governments, UK Government departments, and other experts) that may improve our collective understanding of how the UK internal market is operating. We have committed to report annually on progress in relation to these initiatives and any new projects that could help to shed light on the effective functioning of the UK internal market.

<sup>2</sup> The OIM also tracks regulatory developments in the UK's internal market, focusing on potential differences between the nations of the UK (for example see [OIM regulatory developments dashboard - GOV.UK](#)).

- (c) the OECD's Trade in Value Added (TiVA) Project which is a collaboration between the Department for Business and Trade (DBT), the OECD and the ONS, funded by DBT, which aims to develop better data on how individual UK regions participate in global value chains (GVCs).

- 1.5 In this update we set out our priorities for 2025-26. We anticipate continued delivery of current initiatives and, to build on our Data Strategy, we have considered options that expand on our existing analysis and make use of data that is either currently available or should become available with delivery of other planned initiatives within the next 6-12 months.
- 1.6 We are also looking for opportunities to extend and deepen the community of interest around analysing intra-UK data and to explore new data sources. To help shape conversations with interested researchers, this update includes details of our areas of research interest. We are keen to explore how to take these forward with partners across the wider research community to deliver consistent and high-quality research on the UK internal market. Such research could also contribute to the CMA's focus on productivity, innovation and investment as set out in its 2025-26 Annual Plan.<sup>3</sup>
- 1.7 Our ambition is to continue to work with a broad range of partners to achieve the best possible data and analysis in support of the OIM's role to monitor and report on the operation of the UK internal market. We commit to continuing to update regularly on progress in improving intra-UK data
- 1.8 We encourage stakeholders to get in touch with any comments on our Data Strategy and we welcome suggestions on how to take forward these research proposals. You can contact us at [OIM@cma.gov.uk](mailto:OIM@cma.gov.uk)

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<sup>3</sup> [CMA Annual Plan 2025 to 2026 - GOV.UK](#)

## 2. PROGRESS IN IMPLEMENTING THE DATA STRATEGY ROADMAP

- 2.1 In this section we set out progress on initiatives included in our Data Strategy Roadmap. The OIM's statutory role in monitoring and reporting on the operation of the UK internal market relies on the availability of intra-UK data to provide meaningful insights on economic relationships between the four nations. Our Data Strategy Roadmap highlighted constraints with data available at that time and signalled our commitment to identify improvements and develop new datasets.
- 2.2 To meet our statutory purpose, the OIM draws data together from a range of sources to build insights on the operation of the internal market and shape an overall narrative, for example on trade interactions within the UK, to advise policymakers and support decision making. To this end, we have engaged with and encouraged development of the datasets described in this section. The next phase of this work is to expand the scope of internal market analysis and this update highlights work that we are planning to take forward ourselves, as well as areas where we are looking to facilitate partnerships with other analysts.
- 2.3 We look first at those activities that have been carried out by the OIM, and then summarise progress made by our research partners in developing the various datasets that we use to support our functions.

### **OIM activity**

#### *Use of data in the 2024-25 OIM Annual Report*

- 2.4 In the OIM's [2024-25 Annual Report](#) we continued to build the evidence base on the operation of the UK internal market. This year our assessment of how the UK internal market is operating benefitted from the new ONS interregional trade dataset (see paragraphs 2.8-2.9 below) alongside updated trade data published by the devolved Governments, as well as the ongoing ONS Business Insights and Conditions Survey (BICS) and HMRC customs data on the movement of goods from Great Britain to Northern Ireland.
- 2.5 We found that while analysing current intra-UK trade flows remains challenging, developments over the last 12 months have helped to address some of these challenges, and in particular has enabled more robust comparisons of intra-UK trade values. Future developments will help to extend our analysis over a longer time frame and enable us to examine more recent trends.

## *Engagement and advocacy*

- 2.6 The OIM has continued regular engagement with key stakeholders to monitor developments in relation to intra-UK trade data and highlight the importance of this data to understanding how the UK internal market operates.
- 2.7 In September 2024 the OIM hosted a data event bringing together experts from across the UK and around the world. The aim of the event was to exchange information and ideas, to support our understanding of intra-UK trade data and related issues. The event focused on what data is currently available, who is producing it, and how we can effectively combine data from different sources to improve our understanding of intra-UK economic relationships. The OIM published [insights from the data event](#) in January 2025.
- 2.8 The data event helped to focus debate on issues such as the relative strengths and weaknesses of using bespoke surveys versus taking a ‘big data’ approach to pre-existing datasets, and some of the ongoing practical challenges with working on regional and national trade data, including breaking down large data sets to provide insights at a national level. We are grateful to all the delegates for sharing their perspectives and ideas.
- 2.9 The OIM and the CMA’s Microeconomics Unit responded to the UK Statistics Authority (UKSA)’s call for contributions ahead of its inaugural UK Statistics Assembly held on 22 January 2025.<sup>4</sup> In our response, the Microeconomics Unit highlighted unmet data demands or limitations in several areas, including sources for market definition, business costs structures and inconsistencies in innovation data. The OIM’s contribution to the response focused on the importance of consistent data on flows of goods and services across the nations and regions of the UK. The UKSA’s [Independent report on the 2025 UK Statistics Assembly – UK Statistics Authority](#) was published in March 2025. In regard to business statistics, UKSA’s report highlights the lack of interregional data for England, and a lack of national data across the four nations of the UK. The report also highlights the need for better methods to collect data, for example by using administrative or more modern direct data collection from business systems.

## **ONS interregional trade estimates**

- 2.10 In February 2025 ONS published its [interregional trade figures for 2019 and 2020](#). These data examine trade flows within the UK at International Territorial Level (ITL) 1 (Northern Ireland, Scotland, Wales and the nine English regions). The OIM used the ONS Interregional Estimates in its [2024-2025 annual report](#) to explore the total value of intra-UK trade and its relative importance to each of the four UK

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<sup>4</sup> The Assembly’s aim was to discuss priorities, user needs and gaps, with a focus on local and regional data, and on coherent approaches to data collection across the four nations.

nations for the years 2019 and 2020. We acknowledged that 2020 was an atypical year given the likely impact of Covid-19 on trade flows. We anticipate that data for 2021 and 2022 will be made available during the coming year.

### **Dataset of firm-to-firm payments**

- 2.11 On 13 January 2025, the ONS published an [overview](#) of industry-to-industry payment flows from 2017 to 2024.<sup>5</sup> This was based on anonymised and aggregated Bacs Payment System (Bacs) Direct Debit, Bacs Direct Credit, and Faster Payment System (FPS) Payments. The ONS has indicated that the dataset is under development and over the next 12 months there is an aim to further improve the quality of the experimental data by, where possible, increasing the sample size to include all Bacs and FPS payments between organisations, and develop a regional breakdown.

### **Devolved Governments' trade data**

- 2.12 The Scottish Government, the Welsh Government and NISRA produce trade statistics for their respective nations. These data are used by the ONS along with other data sources to create the UK interregional trade estimates (discussed above). The main developments in relation to these statistics have been:
- (a) In July 2024, the Welsh Government released [provisional Trade Survey for Wales \(TSW\) data for 2022](#). TSW, which has been operating since 2019, collects data through voluntary online surveys and provides estimates for values (in current prices) of intra-UK trade conducted by businesses in Wales.<sup>6</sup> As we reported in the 2024 Roadmap update, Welsh Government paused the TSW for the 2023 reference year.
  - (b) In March 2025, the Welsh government published [Supply and Use Tables \(SUTs\) and Input-Output Tables \(IOTs\) for 2019](#). The project delivered an Input-Output publication for Wales (for base-year 2019), detailing the structures and activities of 55 industries in Wales, along with related product use and supply.<sup>7</sup> Similar tables are also published by the Scottish Government and NISRA, as well as by the ONS for the UK as a whole.
  - (c) The OIM's annual report for 2024/25 used data from [Exports Statistics Scotland 2021](#) (ESS) encompassing estimates of Scotland's exports for 2019, 2020 and 2021 and the [Quarterly National Accounts](#) (QNA) to indicate what trends we might expect to see in Scotland's sales to the rest of the UK

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<sup>5</sup> In December 2023, the ONS published experimental data on industry-to-industry payment flows in the UK from 2016 to 2023, following joint work with the Alan Turing Institute. This one-off dataset was derived from Bacs Direct Debit and Direct Credit payments data on payments between businesses.

<sup>6</sup> For more information see [Trade Survey for Wales, 2022: quality and methodology information \[HTML\] | GOV.WALES](#)

<sup>7</sup> See [Guest Blog: Unpacking the Welsh Economy: Reflections on the Compilation of the Input-Output Tables for Wales | Digital and Data Blog](#)



in 2022 as the 2022 ESS data were not available at that time. It is currently anticipated that 2022 and 2023 data will be released by the Scottish Government in November 2025.

- (d) In December 2024, NISRA published [Northern Ireland Economic Trade Statistics \(NIETS\) results](#) for 2023.

### **Business Insights and Conditions Survey (BICS)**

- 2.13 BICS is a voluntary fortnightly survey that collects real-time data to help understand the impact of challenges faced by the economy and other events on UK businesses. Each wave of data covers a period of two weeks capturing business views on impact on turnover, workforce prices, trade and business resilience.
- 2.14 BICS began in March 2020<sup>8</sup> and continued to provide data during 2024 and 2025, with a sample size of approximately 10,000 businesses each wave.<sup>9</sup> The BICS data provide important insights into the operation of the UK internal market (see paragraph 2.18).

### **OECD Trade in Value Added (TiVA) project**

- 2.15 The TiVA project is a collaboration between DBT, the OECD and the ONS, funded by DBT, which aims to develop better data on how individual UK regions participate in global value chains (GVCs) – i.e., all processes across different countries involved in bringing a good or service to market. It will extend the OECD's TiVA dataset to include breakdowns by UK region/nation, initially at ITL1 level, enabling us to understand the nature of UK regions' participation in GVCs and their resilience to economic shocks that may affect their supply chains.
- 2.16 The consistent estimates of UK interregional trade, discussed above, are an input to the TiVA project. Work on TiVA continues, with provisional TiVA estimates expected later in 2025.

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<sup>8</sup> BICS was initiated as the Business Impact of COVID-19 Survey, and was superseded by the Business Insights and Conditions Survey (see [Business Impact of COVID-19 Survey \(BICS\) results - Office for National Statistics](#) and [Business insights and impact on the UK economy - Swyddfa Ystadegau Gwladol](#)).

<sup>9</sup> The April 2025 survey for example was sent to around 39,000 businesses, of which 10,266 businesses provided a response to the survey.

### 3. PRIORITIES FOR 2025-26

- 3.1 Through 2025-26 we expect to see continued delivery by the data producers of the intra-UK data initiatives described in the previous section, notably the publication of OECD's TiVA dataset, the proposed regional breakdown in the business-to-business payments data and further development of the ONS interregional trade estimates. We will continue to encourage the ongoing production and further development of these datasets.
- 3.2 To build on our Data Strategy we have considered options that expand on existing analysis and make use of data that is either currently available or should become available with delivery of roadmap initiatives.
- 3.3 We are also looking to build new partnerships and explore new data sources, to grow our understanding of the UK internal market. In this section we set out our priorities for 2025-26, including projects we are taking forward and those where we are keen to work with others.
- 3.4 Our ambition is to collaborate with partners across the wider research community to deliver consistent and high-quality research on the UK internal market, which could also contribute to the CMA's work on productivity, innovation and investment, as outlined in its 2025-26 Annual Plan. For the priorities outlined in this update we are looking to engage with a broad range of experts, to build the community of interest around intra-UK data and explore new data sources. To develop this dialogue we are keen to work with researchers who are exploring data that may provide insights on the UK internal market.
- 3.5 Consistent with the CMA's Economic Research Strategy, published in March 2023, we are interested to explore a broad range of collaboration models with researchers.<sup>10</sup> This could include formal and informal interactions and involvement in ongoing projects which provide opportunities to contribute research on the UK internal market.
- 3.6 In developing these priorities:
  - (a) We are looking to derive additional insight into the UK internal market (or be complementary to current analysis), such as the potential for improved granularity and timeliness.
  - (b) We will prioritise data and analysis that provides insights into cross-border flows between nations and between regions and nations.

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<sup>10</sup> [Economic research strategy - GOV.UK](#)

- (c) Priority projects should align with our statutory objective to support, through the application of economic and other technical expertise, the effective operation of the UK internal market.

3.7 We have identified three projects which we intend to take forward in-house in the coming year and a further five areas of interest for further research, where we would be interested in engaging on opportunities for collaboration with external researchers.

## PRIORITIES FOR OWN-INITIATIVE ANALYSIS DURING 2025-26

3.8 We have identified three projects which we intend to take forward in the coming year. These projects focus on additional analysis of survey and administrative data, to strengthen our understanding of economic relations between UK nations and regions and the impact of those relations on the operation of the internal market. These options meet the criteria for consideration set out above and we believe that they can deliver usable outputs within the next 12-18 months, subject to further scoping.

### A. Understanding the internal market through administrative data

3.9 We will scope the use of administrative or transactional data to help our understanding of the UK internal market. Our research topic here is:

- **Is there data which can provide insights into intra-UK trade on a richer, more timely and/or consistent basis than current data used by the OIM,** without being disproportionately costly to acquire or use?

3.10 Potential sources for this work could include business to business payments data produced by ONS, DfT freight movement data, and supermarket scanner data being used experimentally by ONS in its consumer price statistics.

### B. Analysing changes in the composition of intra-UK trade

3.11 We will explore the extent to which the product mix and sectoral engagement in intra-UK trade is changing, through analysis of trade survey outputs. Our research topic here is:

- **Could more granular analysis of trade surveys provide evidence on whether the trade mix is changing?** For example, research could look at the product mix and sectors engaged in intra-UK trade.

3.12 This would provide a more detailed analysis of trade survey outputs than we currently include within our Annual Report. We will consider additional data sources and techniques to compensate for the lack of England trade survey data.

## C. Exploring the integration of supply chains across the UK

3.13 We will explore how we could measure the extent of integration within supply chains across the UK. Our research topic here is:

- **Is there data that would evidence how integrated supply chains are across the UK?** In exploring this topic, we will consider the appropriate measure of integration (for example, proportion of suppliers from other nations, proportion of customers in other nations) and how that could be tracked

3.14 There is work on supply chains ongoing in the CMA's Microeconomics Unit. In addition, OECD's TiVA dataset is likely to be a valuable source for this analysis. The OECD dataset on the integration of UK regions in global value chains should enable us to understand the strength of national and regional participation. We could also undertake additional analysis of the BICS which shows sector-level sales / purchases, as well as potentially making use of ONS business to business payments data.

## 4. AREAS OF RESEARCH INTEREST

- 4.1 In addition to the three projects noted above, we have identified a further five options for research which could help build understanding of how economic relationships between the four nations affect the internal market. We are keen to work with research partners to explore the potential of these options.
- 4.2 We consider that these options are less likely to provide early outcomes. For example, they might require new data collection, could be costly to deliver, or may have significant methodological challenges – in particular it may be challenging to isolate the impact of the internal market regime from other factors. Over the medium-term, however, we are interested in understanding whether any of the following areas could offer insights into how effectively the internal market is operating.
- 4.3 We, therefore, welcome suggestions on how best to take forward this work, including from researchers who may be able to access public grant funding with support from the CMA. Consistent with the CMA's Economic Research Strategy<sup>11</sup> our ambition is to explore a range of collaboration models, including with existing research projects where interests might overlap.

### D. Use of retail data

- 4.4 We would like to explore how retail data could be used across sectors to understand changes in patterns of trade over time. Our research topic here is:
- **How could retail data be used to analyse changes in patterns of trade within economic sectors across UK nations?** This includes consideration of which retail sectors are likely to generate most insights and have data readily accessible. We have already undertaken work on some sectors – for example in food and drink retail - through our reporting and it may be useful to leverage this existing insight by focussing on sectors where the OIM has already identified some potential for differential regulation.<sup>12</sup>
- 4.5 Data sources could include ONS work on use of scanner data in consumer price statistics, as well as business datasets.

### E. Trade and people movement in UK border areas

- 4.6 Much of the OIM's work to date has focused on aggregate trade flows between the four nations of the UK. We are keen to develop this analysis further, for example to

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<sup>11</sup> [Economic research strategy - GOV.UK](#)

<sup>12</sup> [Regulatory developments in the UK internal market - GOV.UK](#)

understand whether distinct interactions may occur in border areas. Our research topic here is:

- **Is there data that can tell us about how goods and services are traded between the border regions of the UK?** For example, what data exists on how people move across borders to deliver or access services?

4.7 Retail card spend data might offer insights, as that analysis is based on postcode areas.<sup>13</sup> Other data, for example on movement of people, may be available from local authorities in border areas, for instance by looking at travel patterns between local authorities.

## F. Consumer purchasing behaviour

4.8 We would like to understand if changes to consumer purchasing can be used to provide insights on developments in the internal market. Our research topic here is:

- **Could data on consumer purchasing behaviour be used to provide insights on the effectiveness of the internal market? If so, how?**

4.9 Retail card spend data might provide some helpful context on this. The sectoral breakdown of ONS's business to business payments dataset may also be helpful. That dataset covers 2017-2024. Payments between businesses might provide a proxy view of consumer behaviour, at least for some sectors.

## G. Public procurement data

4.10 Ongoing developments in the reporting of public procurement data may provide helpful context on trade between nations and regions. Our research topic here is:

- **Could data on the procurement of goods and services by the public sector be used to assess how the internal market is changing? If so, how?** Evidence might include the type, volume and origin of goods and services purchased. Initiatives to help more SMEs bid for contracts could also be relevant, if those initiatives tend to encourage local supply of goods and services.

4.11 One starting point for this would be the procurement data published by the UK government, devolved governments and local authorities.<sup>14</sup>

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<sup>13</sup> [Estimating geographical retail markets from card spending data - GOV.UK](#)

<sup>14</sup> For example see [Search for and download OCDS data | OCP Data Registry](#)

## H. Regional pricing

4.12 We are keen to understand the extent to which differences in regulations across the UK nations are a contributor to differences in prices. Our research topic here is:

- **Could differences in regional pricing be used to assess the effects of regulatory differences across the UK? If so, how?**

4.13 This is a broad topic where there is an amount of interest and previous work;<sup>15,16</sup> however disentangling the various factors that affect the price of goods and services between different regions within the UK (e.g. scale, peripherality, local taxes) is a significant challenge. Any work undertaken in relation to this topic could contribute to wider discussions of regional pricing. For example, experimental statistics for a regional Consumer Prices Index including owner occupiers' housing costs (rCPIH) have been recently produced as part of a feasibility study carried out by the University of Southampton.<sup>17</sup>

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<sup>15</sup> Intra-UK regulatory or policy divergence has the potential to affect the price of products and services traded between different regions within the UK (for example see [Overview of the UK Internal Market](#) and [UK internal market \(HTML page\) - GOV.UK](#)).

<sup>16</sup> [Developing a Northern Ireland Consumer Prices Index - Office for National Statistics](#)

<sup>17</sup> [Feasibility study into producing CPIH consistent inflation rates for UK regions - Office for National Statistics](#). See also [Hearne and Bailey \(2025\)](#) for a review of recent work in this area.

## 5. GET IN TOUCH WITH US

- 5.1 Our ambition to collaborate with partners across the research community to deliver consistent and high-quality research on the UK internal market is centred on building the community of interest around intra-UK data. This includes any effects from regulatory differences between the nations that may have an impact on the operation of the UK internal market.
- 5.2 The CMA can contribute expertise to these collaborations, potentially including data analysis and logistical support. Importantly, working with the OIM and the wider CMA raises the profile of research, for example through contributing to the OIM's well-regarded statutory reporting on the UK internal market. Active engagement in research with us helps to improve the evidence base, contributes to wider debates and has potential to influence policymakers across the four governments.
- 5.3 We encourage stakeholders to get in touch with any comments on our Data Strategy and we welcome suggestions on how to take forward these research proposals. You can contact us at [OIM@cma.gov.uk](mailto:OIM@cma.gov.uk)