Corporate Partners seminar: Digital connectivity

How climate ready is our digital infrastructure – what do localities need to do? What do councils need from Government and industry?

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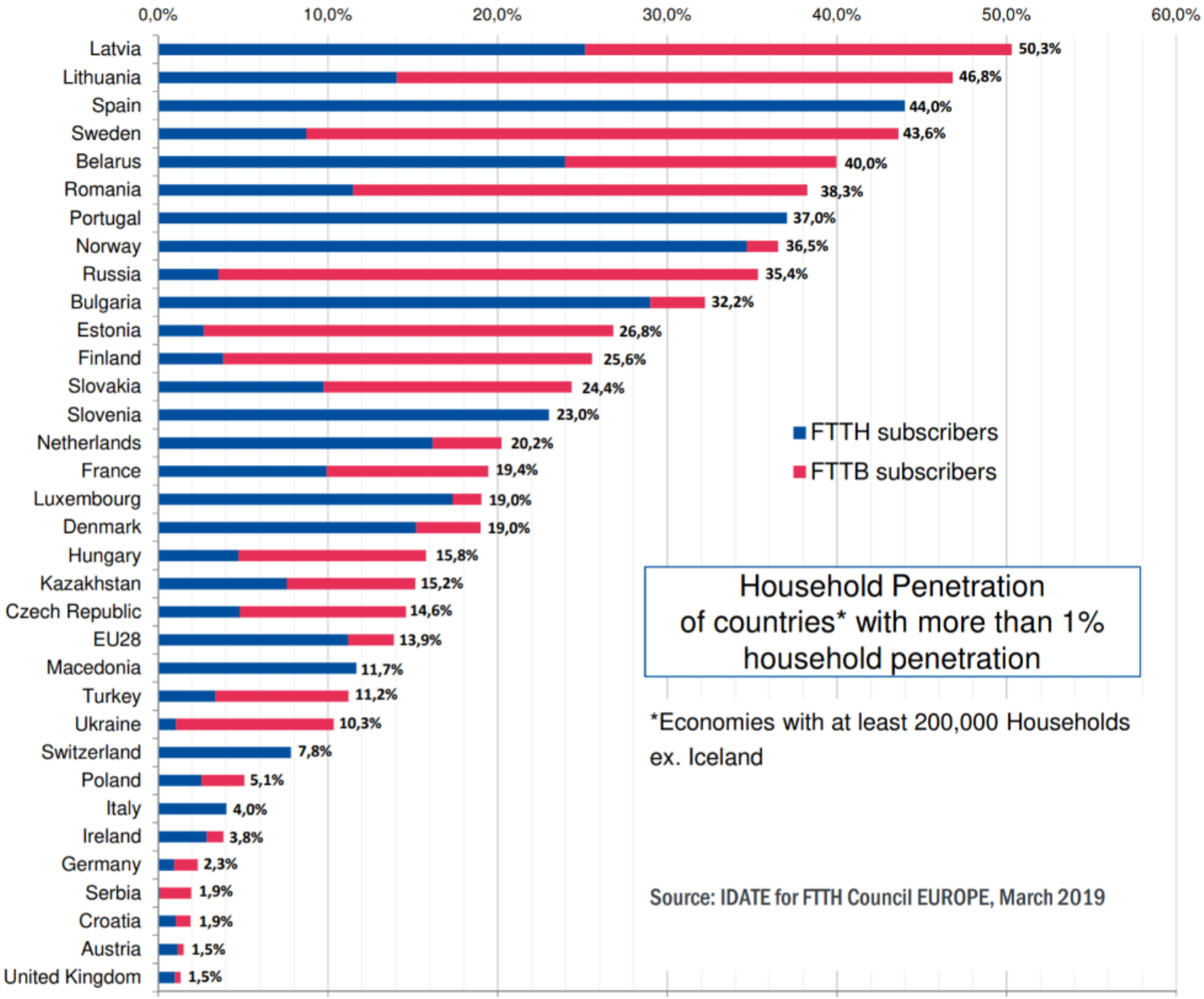
ADEPT

The Association of Directors of Environment, Economy, Planning & Transport

Full Fibre in the UK



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Current Policy

- **Future Telecoms Infrastructure Review 2018**
  - Full Fibre the new focus as well as universal 5G
  - Long term convergence of Fibre and 5g to provide seamless connectivity
  - 50% Full Fibre by 2025 & 100% by 2033
  - PM aspiration of 100% by 2025
  - Accelerated Government Plan focused on 2030
  - Universal 5G by 2027
- **Separate calls for copper switch off by 2027**

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Existing Provision

- **Commercial Superfast Programme**
  - 2010-14 Peak deployment
  - Openreach & Virgin Media the key suppliers primarily FTTC or Coax Network therefore mainly copper
  - Pockets of alt net provision but not yet substantial
- **Subsidised Superfast Programme**
  - In delivery since 2013
  - County based contracts
  - Provided the easier 80% of the final 3rd of the UK with Superfast provision
  - Almost exclusively through BT / Openreach distinct lack of Altnets
  - Primarily via FTTC
- **95% of the UK has superfast**

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Full Fibre

- Fibre to the Home/Business
- General capability of 1Gbps but scope to go far faster
- UK now at 8% coverage but focused mainly on a handful of cities and in a limited number of rural areas.
- Output will need to accelerate rapidly even to meet even the 2030 timescales
- It is an entirely different animal
- Deployed via PIA using Openreach ducts and poles where they exist or through brand new network build some of which provides wholesale access others do not
- It is by far more complex, costly and time consuming to deploy and will be more invasive by degrees of magnitude relative to the superfast programmes

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- The Investment Market is ripe for long term revenue generating infrastructure
- Minor explosion in Suppliers
- We are on the verge of a land grab & everyone wants to be first operator in a location.

- But still focused on the more viable locations.

- 80-90% of UK expected to be commercially viable but its not clear if this is realistic or exactly where is / is not going to be viable
- BDUK £5bn programme for the final 10-20% from 2023 though bits and pieces happening in the interim and some county contracts will still be delivering for some time.

5G

- All 4 MNOs have launched but restricted to a small number of communities
- Probably likely to manifest in more 4G installations initially
- True 5G particularly in Urban Areas will require vast numbers of small cell sites

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What do Localities need to do?

- Be prepared for disruption FTTC relatively non invasive, FTTP will not be so easy!
- FTIR aiming to see a nationwide standard approach to street works in relation to Fibre deployment – Not sure how realistic or achievable this is.
- Be flexible
  - Deployment methodologies
    - Narrow and Micro Trenching
  - Noticing
    - Early starts & rolling notices (difficult to determine the dig rate so restrictive noticing can create build inefficiencies)
  - Traffic Management
    - How to manage traffic flow when areas are being saturated by suppliers
    - Allow operators to avoid full road closures using more agile options
  - Coordination
    - Balancing requests from multiple CPs as well as all the other utilities
    - S58's
  - Wayleaves
    - Holistic agreements for LA land
  - Assets
    - Particularly for 5G, street furniture and public ducts will be required
  - Leadership and Public Opinion
    - 5G Health Concerns
    - Balancing the disruption with the long term economic and social benefits

- Q. Adept's Digital Policy favours encouraging competition. What therefore should LA's do if approached by a closed supplier first given their presence will deter other operators?

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What do Councils need from Government & Industry?

- Transparency – Highly competitive market means plans are closely guarded
- Industry should be encouraged by Government to submit their Deployment Plans in detail to LA's as early as possible
- Government should continue to improve the PIA terms such that they are more attractive to other operators than deploying their own networks out right
- Industry needs to increase their capacity and capability to deploy full fibre networks. The skills and quality is variable and this will be stretched further given the challenging targets.
- Government could be asked to create a remediation pot for local authorities to compensate for any damage resulting from the rapid deployment of networks beyond the warranty period

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