Metrics for the UK independent network sector

Including results from Spring 2020 survey

April 2020 1.0

A Point Topic report for INCA

Point Topic Ltd
Innovation Warehouse
1 East Poultry Avenue
London
EC1A 9PT
Tel: +44 (0)20 3301 3303
oliver.johnson@point-topic.com
annelise.berendt@point-topic.com

1. *Summary* ... 3
2. *Introduction* ... 4
3. *Key metrics* ... 6
4. *Assessing scale and ambitions of the independent network sector* ... 7
5. *Independent network sector coverage mapping* ... 12
6. *Independent network sector investment* ... 18
7. *Independent network sector concerns* ... 20
8. *Appendix A* ... 22

Effect of COVID-19 pandemic on report projections

The INCA survey, as well as other research for this report, was undertaken before the COVID-19 pandemic really took hold.

Operators are working hard to run their businesses as close to usual as possible but there are significant concerns about the impact on maintaining and building new networks, undertaking street works and customer installations, as well as other operational issues.

INCA and its members are grateful for the support provided by Government in recognition of the increased importance of digital communications for the country at this time.

Everyone hopes that this situation will be relatively short-lived, but it is likely to have an impact on 2020 build plans.

1. Summary

Premises passed
• The UK's independent operators are estimated to have passed 1.2 million premises with fixed superfast or ultrafast broadband networks at end-2019[1]
• This represents over 50 per cent growth year-on-year, compared with 23 per cent last year
• The majority uses ultrafast fibre-to-the-premises or home (FTTP/H) and fibre-to-the-building (FTTB) technology
• Fixed wireless access (FWA) networks are estimated to cover over 2.3 million premises[2]
• In total the UK's independent operators are estimated to pass or cover 3.5 million premises.

Live connections
• There are 366,000 live connections to superfast and ultrafast fixed networks provided by independent operators, up by 23 per cent year-on-year
• We continue to estimate 110,000 live connections via independent FWA infrastructure
• In total, independent operators accounted for an estimated 476,000 live connections at end-2019, up 17 per cent year-on-year.

Expectations and aspirations
• Fixed superfast or ultrafast infrastructure supplied by independent operators is expected to reach 2.4 million premises at the end of 2020 with an estimated 804,000 live connections
• By end-2025 operators aspire to cover 15.7 million homes and businesses, with around 4.3 million live connections
• These expectations include double counting, as networks will see some overlap.

Investment
• Interest and commitment remain strong in the independent network sector, with financial-related announcements totalling £936 million during 2019 and early 2020
• This is in addition to an estimated £5.7 billion of private investment-related announcements already made in relation to the sector, bringing the total to £6.6 billion
• Intended capex spend by at least part of the sector from now until end-2025 is estimated at over £5.4 billion[3].

Concerns
• The top three concerns for independent network operators are delivery times for services from Openreach and other operators, overbuild, and getting wayleaves.
• Access to skills and labour ranks fourth in this year's list alongside access to finance, access to cost-effective backhaul services, and using Physical Infrastructure Access (PIA) from Openreach
• Planning and street works delays and costs have moved down the list of key concerns.

---

[1] This year's report focuses on premises passed, not addressed, for fixed infrastructure; past years have been backdated accordingly. There remains some variation in operators' reporting. See general caveat on page 4.
[2] The fixed wireless access (FWA) market is more difficult to assess due to line of sight issues and fragmented supply in the sector.
[3] See general caveat on page 4.

2. Introduction

This report provides an overview of the UK's independent network operator sector as of end-2019 and early 2020 in terms of scale, coverage, ambitions and concerns. As in the previous two years it includes both fixed and fixed wireless network operators.

This year, however, we have changed our approach to premises passed, so we no longer include addressable premises for fixed infrastructure (see definitions below). This has meant a revision of our previous years' numbers and has resulted in what we believe is a more realistic view of the market.

Once again the report has been produced in partnership between INCA – the Independent Networks Cooperative Association – and Point Topic, drawing on input from both INCA members and non-members.

Basis for research

In compiling these statistics, Point Topic has relied heavily on self-reporting by network operators. Where numbers are unknown, we have used our own estimates including postcode data if available. We do this in conjunction with our partner Thinkbroadband.

INCA members were surveyed during January to early March 2020. Survey questions can be found at https://www.surveymonkey.co.uk/r/independent-networks-survey-2020 and in Appendix A.

The report also draws on Point Topic's continuing Superfast & Ultrafast Broadband Update and Broadband Geography research programmes, which have been gathering information and datasets since June 2009. This research is used particularly in assessing expansion in recent years of the independent network operator footprint.

General caveat

The premises passed, investment and capex projections included in this report are from a number of sources, including INCA surveys, and should be treated as indicative only. Different data sources may be used for the different parameters reported, so it is not possible to directly compare them nor, for example, to divide capex projections with projected premises passed figures to estimate cost per premises passed.

Research aims

By gathering information on coverage in terms of premises passed, live connection numbers, expansion plans and key concerns on an aggregated basis, the independent sector will be better able to demonstrate to policy makers, Ofcom, investors and the media, the role it is playing and the advances it is making in bringing ultrafast broadband to UK homes and businesses.

This is especially important given Ofcom's proposed approach to regulation outlined in Promoting investment and competition in fibre networks – Wholesale Fixed Telecoms Market Review 2021-26, in order to present clear evidence of both current coverage by independent network operators and future build plans up to at least 2026.

Definitions

- Premises passed – this year we have used *premises passed* figures rather than *addressable premises* for fixed infrastructure. Point Topic defines premises passed as those that can readily order a broadband service. In our previous reports we included premises addressed as provided to us by operators – an addressable premises tends to be classed as a home or business located within x metres of a network. The Ofcom definition for full fibre coverage is, "where the network has been rolled out to a 'lead-in' that will serve the consumer end premises and where the consumer would expect to pay a standard installation charge for that connection".[4] We welcome the industry's move towards more consistent definitions of coverage but recognise there remain varying definitions and different terms. We have maintained premises addressed or covered for FWA infrastructure, given line of sight and other issues.

- Connections – live connections we define as premises which have an active subscription/s to a broadband service. We include both residential and business, wholesale and retail but without double-counting of these figures.
- Independent operator (also known as altnet) – we define this as an organisation deploying broadband infrastructure for wholesale and/or retail use, which is not part of either the UK's incumbent operators BT Group or KCOM in Kingston upon Hull, and which is not Virgin Media as the national cable operator. This includes community groups, not-for-profit organisations, and privately funded companies.
- Technologies – in terms of fixed networks, we cover fibre-based network deployments including fibre-to-the-cabinet (FTTC), fibre-to-the-premises or home (FTTP/H) and fibre-to-the-building (FTTB). We also cover cable infrastructure (Docsis 3.0 and 3.1). Fixed wireless access (FWA) deployments are included where we have been able to gain information. This report does not cover satellite, 4G, white space or leased line infrastructure.
- Bandwidth – we cover next-generation broadband infrastructure capable of offering bandwidths of 30Mbps download or above. However, coverage of FWA technology includes sub-superfast bandwidth. The industry now widely refers to 100Mbps download and above as ultrafast. Ultrafast is defined as 100Mbps by the European Commission and the UK Government. Ofcom however, defines ultrafast as 300Mbps or more.

Next steps

Now in its third year, we plan to continue this report on a regular basis in order to follow changes in the market, track advances in coverage and scale, and explore new issues and concerns within the independent community as they arise.

The attached 2020 survey has been completed by 21 independent network operators forming a representative sample of the UK independent sector. Our thanks go to all those who have taken part in the survey.

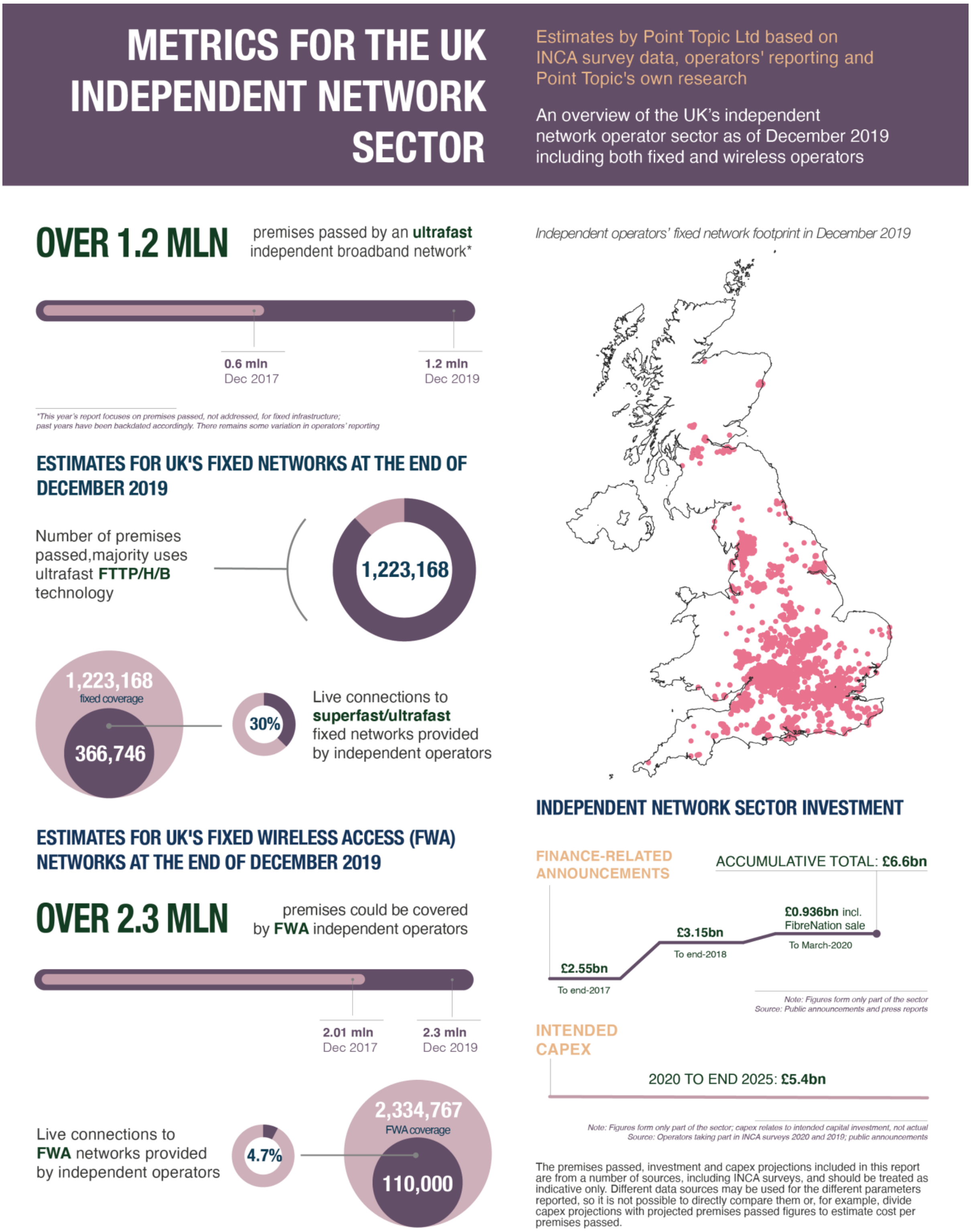
As mentioned above, we rely to a large extent on self-reported statistics to assess the scale of the sector in terms of premises covered and live connections. In order to increase the rigour of data we will continue to work with INCA and the industry to agree on metrics and outputs, including definitions.

The FWA market in particular still requires further research in order to better assess coverage and customer base.

[4] Ofcom's Connected Nations 2019 Annex A: Methodology
https://www.ofcom.org.uk/__data/assets/pdf_file/0021/186411/connected-nations-2019-methodology.pdf

3. Key metrics

The following infographic provides a snapshot of the UK independent network operator sector at the end of 2019.



4. Assessing scale and ambitions of the independent network sector

Point Topic provides estimates of premises passed for the UK's fixed independent operators and live connections as at the end of December 2019. Unlike our previous two reports for INCA, this year we only include premises passed rather than addressed.

We provide an estimate for premises addressed or covered by fixed wireless access infrastructure of independent operators, as well as total connections for these players.

We collect expectations and aspirations for some (not all) of these numbers at the end of 2020, and end of 2025.

Estimates are based on public announcements, survey data supplemented by Point Topic and Thinkbroadband research as outlined above, either reported to us by network operators or using our own estimates when actual numbers are unavailable.

Table 1 below contains estimated key metrics for the UK's independent fixed superfast and ultrafast, and FWA broadband sectors.

Premises passed and connected by fixed superfast and ultrafast networks

At end-December 2019, the UK's independent network operators are estimated to have passed over 1.2 million premises with their fixed broadband infrastructure. This is an increase of 52 per cent year-on-year. The vast majority uses ultrafast FTTP/H and FTTB technology.

Live connections for independent operators stood at an estimated 366,000 at the end of December 2019, up 23 per cent on last year.

Premises addressed and connected by FWA networks

Independent FWA infrastructure is estimated to have passed or addressed 2.3 million premises at the end of 2019. Live connections over independent network operators' FWA infrastructure remain at an estimated 110,000.

Total independent network coverage and connections

We estimate the total independent sector using fixed and FWA technologies in the UK accounted for 3.5 million premises passed or addressed at the end-December 2019. Independent operators between them had an estimated 476,000 live connections.

Expectations for end-2020

We asked survey respondents to provide an indication of how many premises passed and live connections they expected to have at end-December 2020. Several operators have given public indications of their future coverage aims.

We estimate total plans are for 2.4 million premises passed, and just over 800,000 connections by fixed network operators. This does not take account of overbuild, which is already growing among independent networks operators as their coverage footprints expand.

Aspirations for end-2025

We asked operators to give an idea of their aspirations for end-2025 in terms of premises passed and live connections. We have also used public announcements and Point Topic research to arrive at estimates. These put targets for premises passed at 15.7 million and connections at 4.3 million for end-2025 for fixed ultrafast infrastructure. This also contains double counting of premises where footprints overlap.

For comparison our survey last year (2019) put the end-2025 target at 15.9 million passed and connections at 4.8 million for 2025 for fixed ultrafast infrastructure. The year before (2018) these figures stood at 14.2 million for premises passed and 4.8 million connections for end-2025 for fixed ultrafast infrastructure. This is not based on the whole independent network operator market but it does include the largest players.

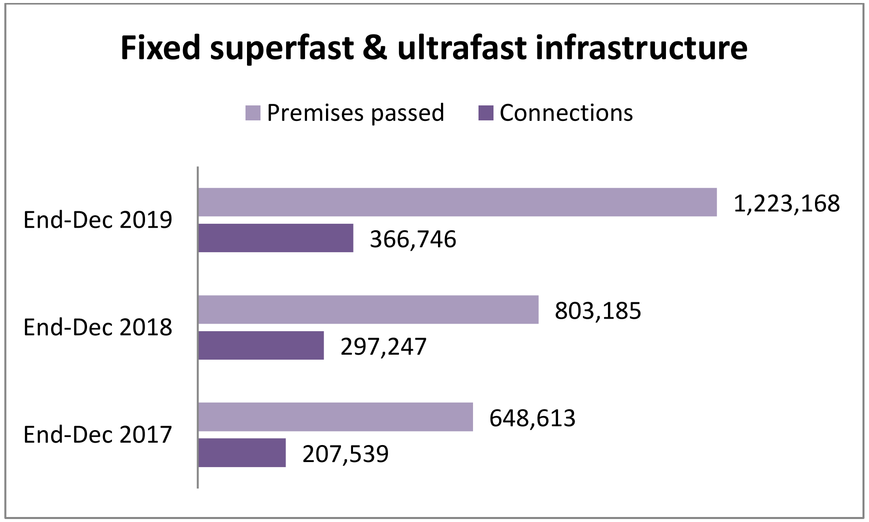
Unfortunately there is still too little information available in the market for us to provide any future figures for the fixed wireless sector on this basis.

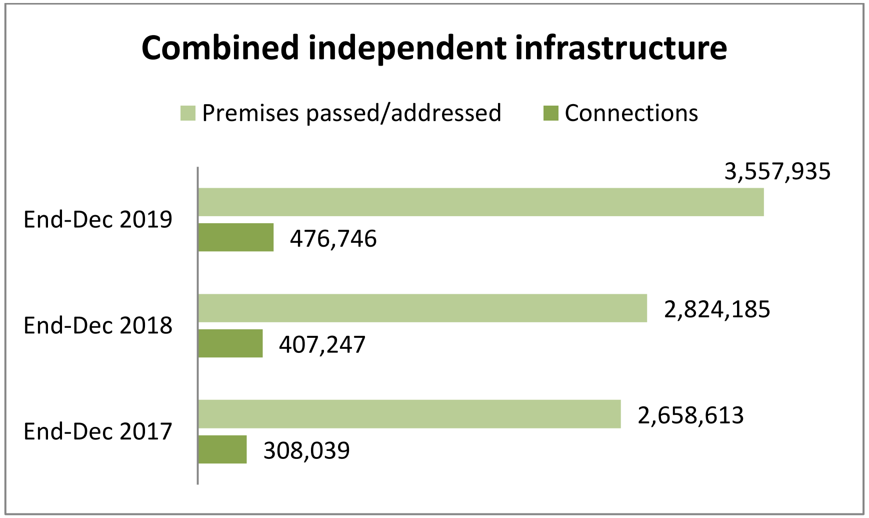
Table 1: Estimated key metrics for UK independent network sector

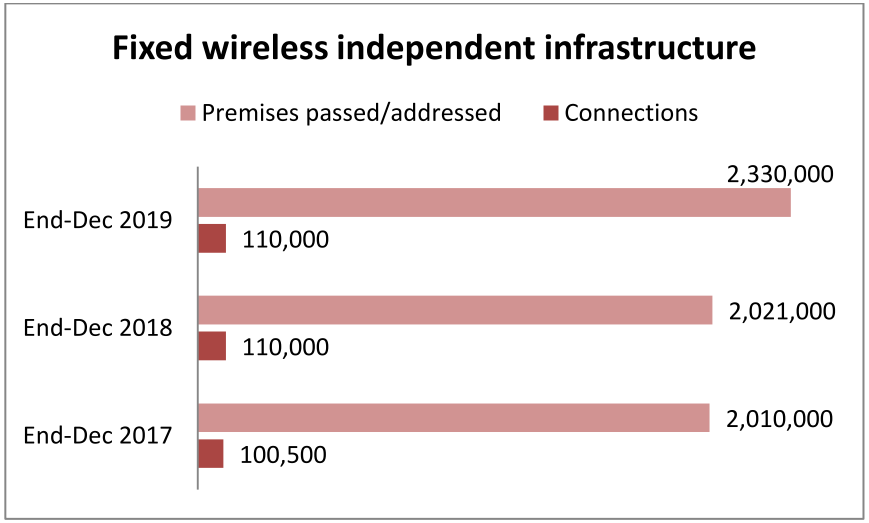
FIXED SUPERFAST & ULTRAFAST INFRASTRUCTURE		
Total for fixed superfast and ultrafast operators	**Connections**	**Premises passed**
End-December 2017	207,539	648,613*
End-December 2018	297,247	803,185*
End-December 2019	366,746	1,223,168
FIXED WIRELESS ACCESS INFRASTRUCTURE		
Total for FWA operators	**Connections**	**Premises passed/addressed**
End-December 2017	100,500	2,010,000
End-December 2018	110,000	2,021,000
End-December 2019	110,000	2,334,767
COMBINED INDEPENDENT NETWORK INFRASTRUCTURE		
Independent sector fixed and FWA	**Connections**	**Premises passed/addressed**
End-December 2017	308,039	2,658,613*
End-December 2018	407,247	2,824,185*
End-December 2019	476,746	3,557,935
EXPECTATIONS & ASPIRATIONS (February 2020)		
FIXED SUPERFAST & ULTRAFAST INFRASTRUCTURE		
	Connections	**Premises passed**
End-December 2020	804,101	2,417,300
Aspirations for end-2025	4,318,550	15,734,673

Note: these numbers have been restated since our last report as this year we only include premises passed rather than addressed for fixed infrastructure*
See general caveat on page 4
Source: INCA survey, Point Topic research and estimates

Figure 1: Key data changes from 2018, 2019 to 2020 INCA surveys







Note: backdated premises passed figures for fixed infrastructure
See general caveat on page 4

Fixed independent superfast & ultrafast infrastructure	2018 to 2019 change	2019 to 2020 change
Premises passed	23.83%	52.29%
Connections	43.22%	23.38%

Fixed wireless independent infrastructure	2018 to 2019 change	2019 to 2020 change
Premises passed/addressed	0.55%	15.29%
Connections	9.45%	0.00%

Combined independent infrastructure	2018 to 2019 change	2019 to 2020 change
Premises passed/addressed	6.23%	25.98%
Connections	32.21%	17.07%

Table 2: Public expansion announcements by selected independent network operators

Operator	Plans	Date announced
Airband	Aim to pass an additional 50,000 premises by 2021 using mix of fibre and wireless bringing total to 70,000	7 August 2018
B4RN	Planning further expansion following successful crowdfunding which may enable reaching 20,000 additional premises over next few years, up from 6,000	8 July 2019
BitStreme	Launched 1Gbps capable hybrid fibre optic and microwave wireless broadband network to cover three locations around Bedfordshire, soon to be followed by additional areas in Essex and Kent	10 July 2019
Box Broadband	Plans to cover approximately 10,000 homes in Surrey and West Sussex over the next 12 months and hope to cover 160,000 homes over the next four years, possibly 200,000 with the right support	18 September 2019
British Fibre Networks	Planning to serve over 35 per cent of UK new build homes by 2020; has signed up 24,000 new homes with 50 housing developers	10 November 2018/8 May 2019
Call Flow Solutions' Trooli	To build a FTTP network to 500,000 premises across South East of England by end of 2025 with 150,000 as of mid-2022, from current 10,000 footprint	5 June 2019/7 January 2020
CityFibre	Target increased from five million to eight million premises by 2025 or a little later following purchase of TalkTalk Group's FibreNation (which has long term plan to cover three million premises)	21 January 2020
Community Fibre	Aim to bring full fibre network to more than 500,000 homes and businesses across London by 2022; initial target of 100,000 premises reached by the end of 2019	16 July 2019/23 April 2018/20 March 2018
County Broadband	50 villages in initial build plan until Q2 2020 reaching around 15,000 total homes passed with aim to cover total of 40,000 premises by end-2020 in East of England	7 November 2019/12 June 2018/17 April 2019
Ecom	Building a FTTP network to several rural villages in Aylesbury Vale district of Buckinghamshire, aim for 1,000 premises passed by end-2019	19 July 2019
Full Fibre Ltd	Aims to reach rural and semi-urban areas around Devon, Surrey, Somerset, Gloucestershire and Herefordshire with build underway to cover over 5,000 premises	5 October 2019
Gigaclear	Target of connecting 500,000 premises by 2024; ambition to cover 350,000 premises by end-2021	9 April 2019
Glide	Ambition to cover 200,000 premises by the end of 2020 with mostly fibre optic technology, from reach of over 100,000 premises	27 January 2020
G.Network	Ambition to roll out FTTP to 120,000 premises across parts of London	7 September 2019/5 November 2018
Hyperoptic	Ambition to cover two million homes by the end-2021 and then possibly five million by the end of 2024	7 November 2018
ITS Technology Group	Plan to move into several new areas across UK to build full fibre networks which will pass at least 200,000 business	21 January 2020

	and residential premises	
Jurassic Fibre	Plans to build a network passing more than 300,000 homes in Devon, Dorset and Somerset in the coming years including Honiton, Tiverton, Barnstaple, Teignmouth, Taunton, Dorchester, Weymouth and Yeovil; longer-term goal is to potentially reach as many as 350,000 premises across Devon, Dorset, and Somerset	17 April 2019
Lightning Fibre	Reported aim to deliver around 50,000 properties passed within the next three years	22 March 2019
Lothian Broadband	Announced its FTTP network in the East Lothian village of Gifford is to be extended in the next phase of network build, with the aim to pass 200 premises around East Lothian	12 October 2019
Nextgenaccess	Signed new 20-year concession with High Speed 1 for track-side rail deployment from London to the UK Channel Tunnel in Kent. Plans to deploy over 1,000km of new high capacity fibre routes across the UK by end-2020 and open up ultrafast connectivity to over 4,000 underserved businesses along South Wales to Southwest England route	13 November 2019/26 October 2018
OFNL/GTC owned by BUUK	BUUK is planning to rapidly increase the number of new homes it connects, targeting 200,000 new build properties over the next 12 months	18 September 2019
Quickline (part of Bigblu)	Plan to reach 30,000 premises across the north of the UK using a mixture of fibre optic and wireless technologies	12 August 2019
Swish Fibre	Plans to build networks within a commutable distance of London and has initially identified 250,000 properties for its 10Gbps FTTP network	17 December 2019/9 August 2019
toob	Fibre network to more than 100,000 premises by end-2021 with ambition to pass more than one million homes and business premises over next 10 years	4 December 2019/25 March 2019
TrueSpeed	Aims to cover 75,000 premises in parts of rural South West England by 2021 and holds an aspiration of reaching 200,000 by 2025	5 December 2019/ 11 July 2017
VXFiber	Project with City of Stoke-on-Trent worth £19.2 million aims to create a publicly-owned and operated, open-access and gigabit-capable, 60-mile long full fibre broadband network with "citywide" coverage by spring 2021	25 October 2019
Wessex Internet	Deploying FTTP to hamlets of Cripplestyle, Broxhill, Crendell and surrounding areas (East Dorset)	4 April 2019
WightFibre	Rollout a new 1Gbps FTTH network to over 60,000 of 70,000 homes on the Isle of Wight by the end of 2021	18 November 2019
Zzoomm	Targeting addressable market of 4.5 million homes and plans to cover one million of these; first deployment live at Henley-upon-Thames	21 January 2020

Source: Independent operators, predominantly using FTTP/H/B technology

5. Independent network sector coverage mapping

Point Topic maps broadband provision throughout the UK, including footprints of the country's independent network operators.

As part of the INCA survey we asked independent operators to provide their coverage details. We have also used our own research and that of our partner Thinkbroadband to provide a view of independent network infrastructure provision today, both for superfast and ultrafast fixed networks and for FWA networks. Figures 2 to 9 provide more detail.

Figure 2: Fixed independent operator presence in UK at end-2015 to end-2019

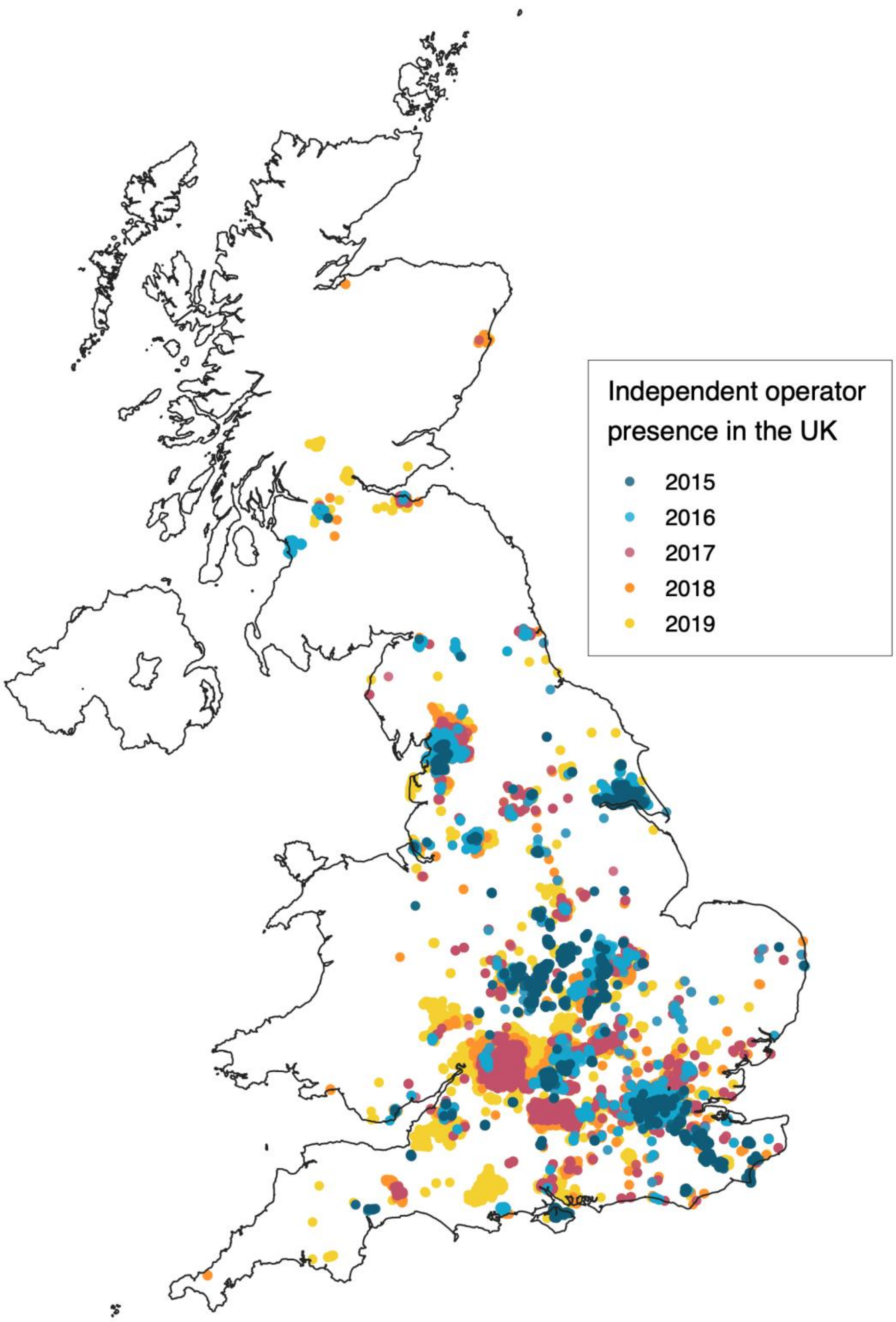


Figure 3: Fixed superfast & ultrafast independent operator presence in UK, end-December 2019

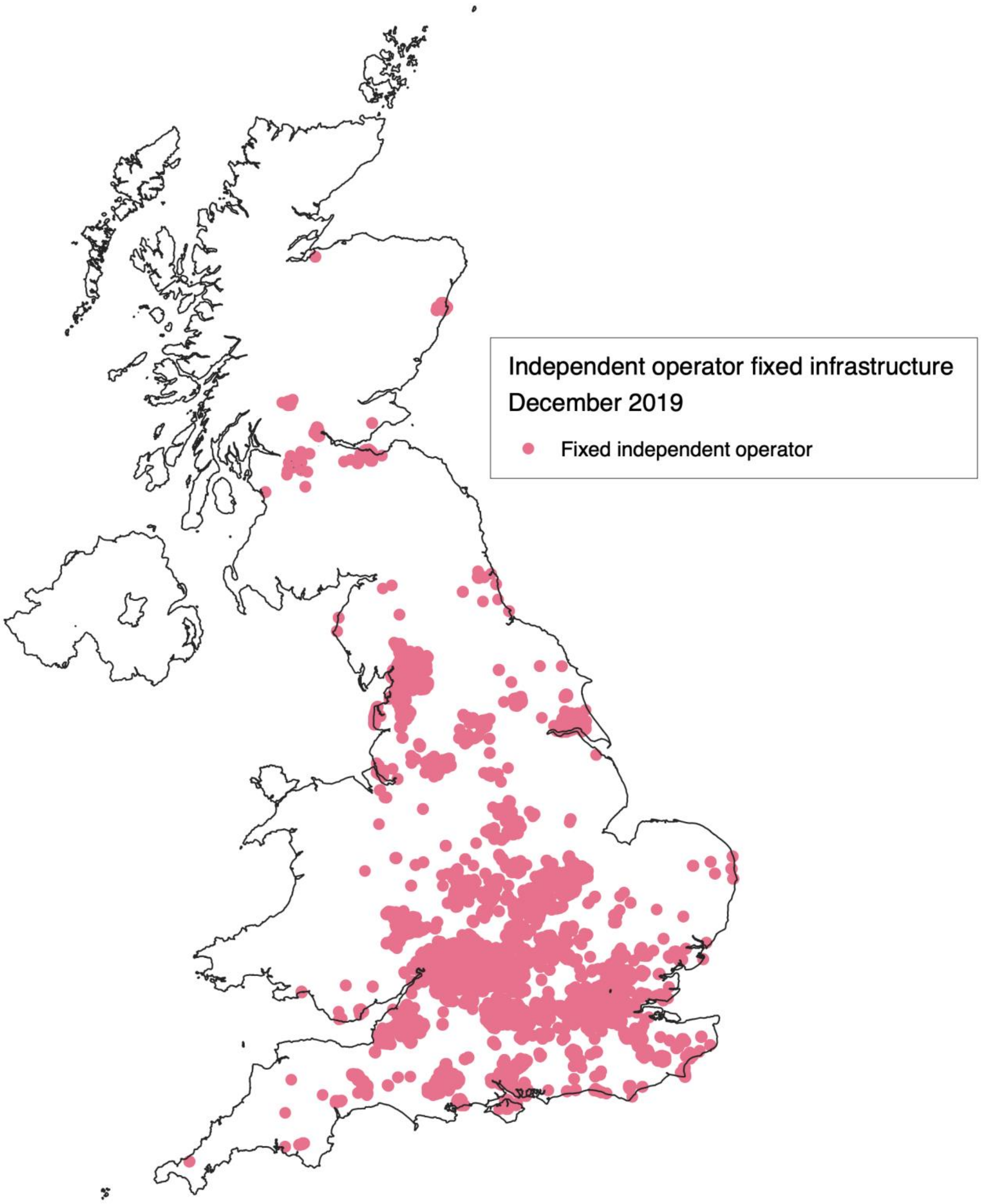


Figure 4: Independent operator FWA presence in UK, selected players, end-December 2019

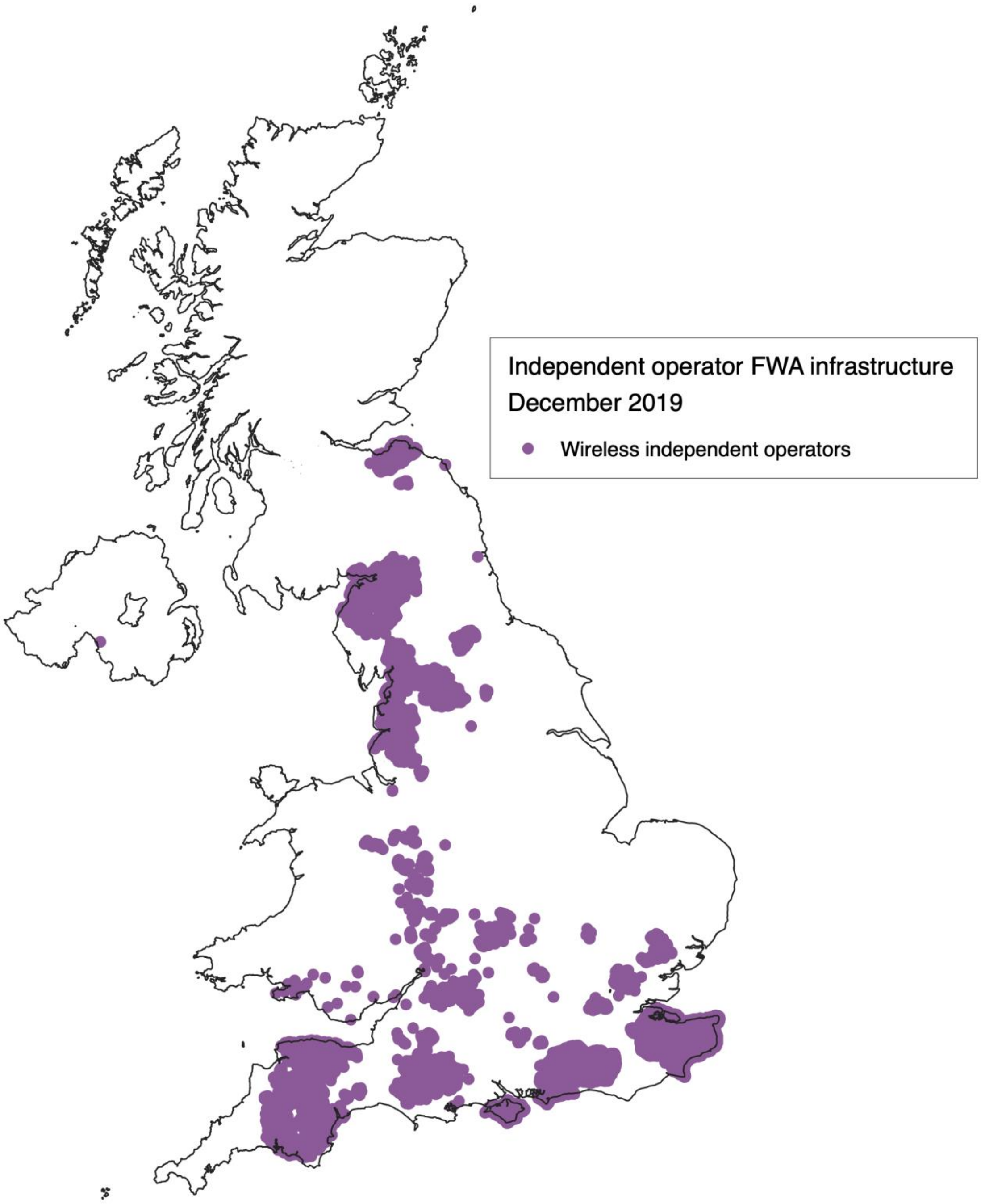
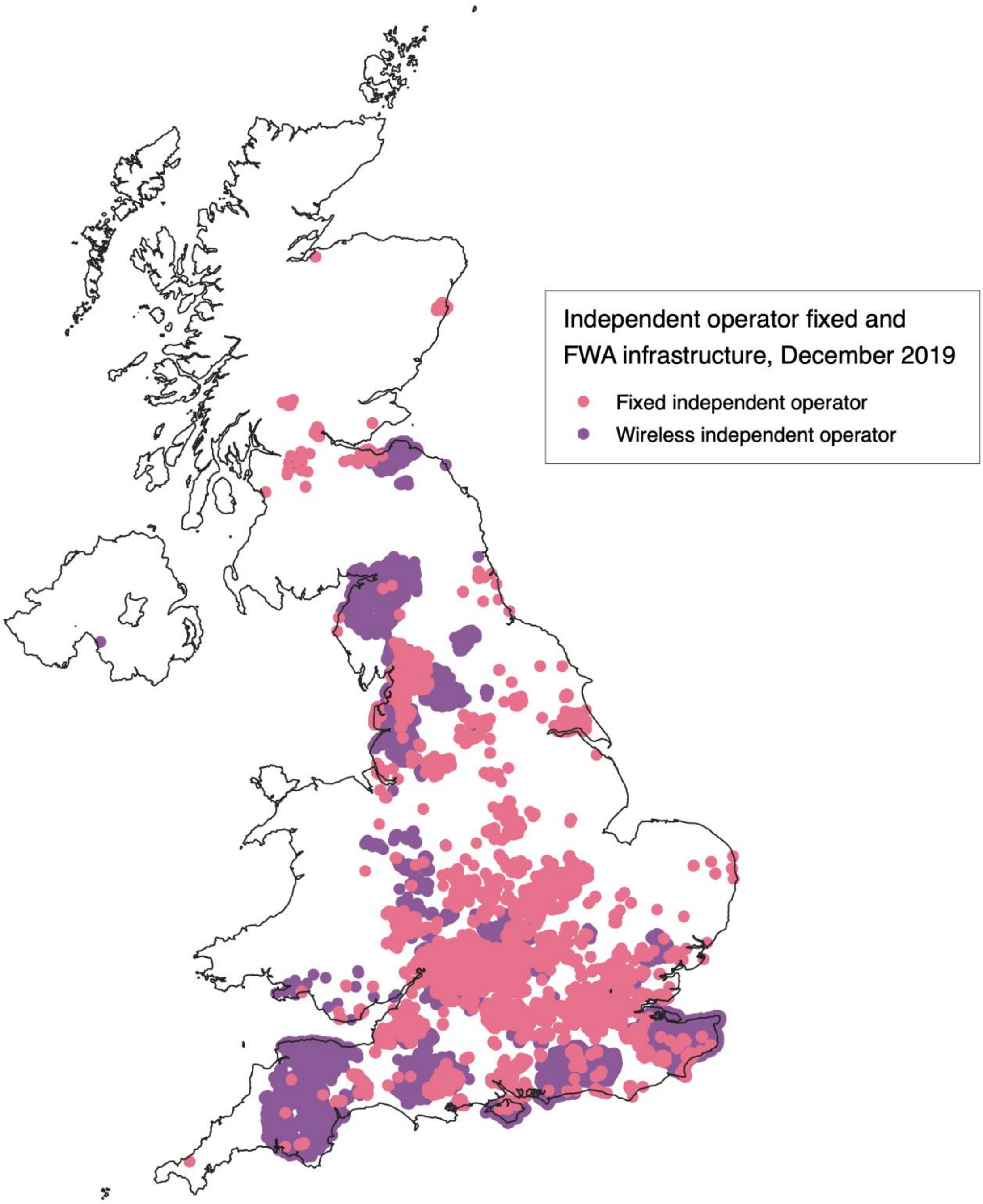


Figure 5: Independent operator presence fixed & selected FWA players in UK, end-December 2019



Figures 6 to 9 show the expanding footprint of independent networks in various cities.

Figure 6: Fixed independent operator presence in London

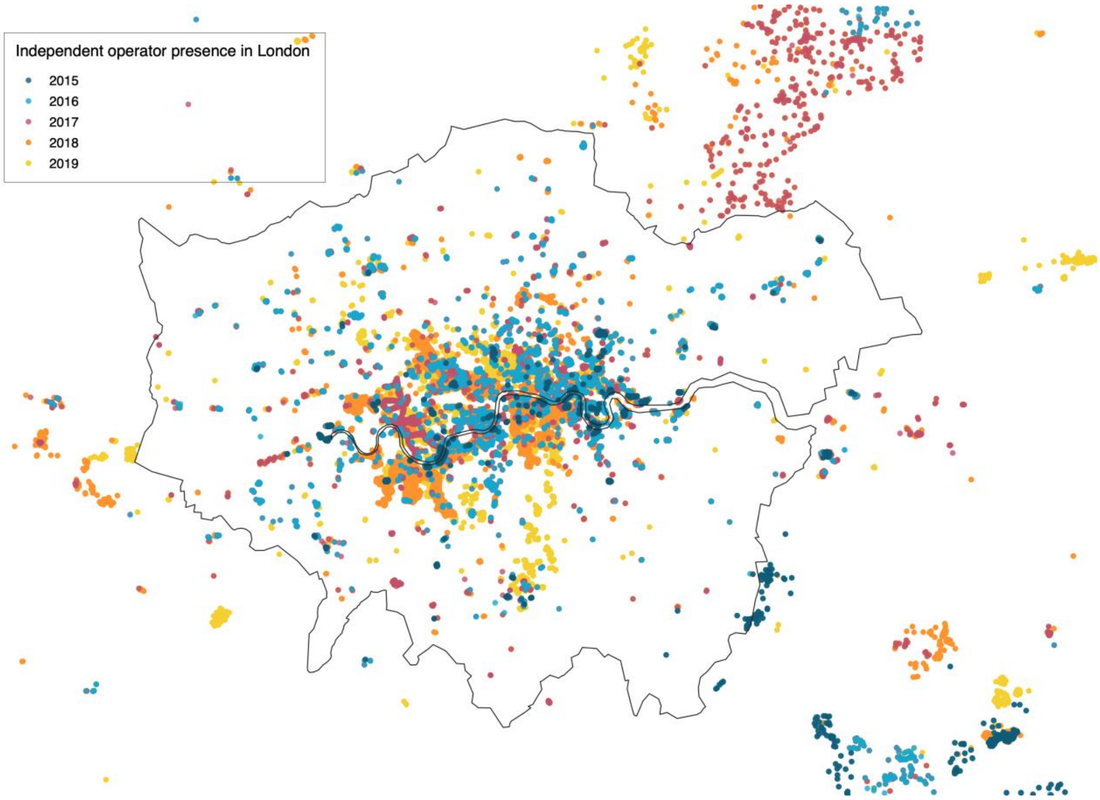


Figure 7: Fixed independent operator presence in Manchester

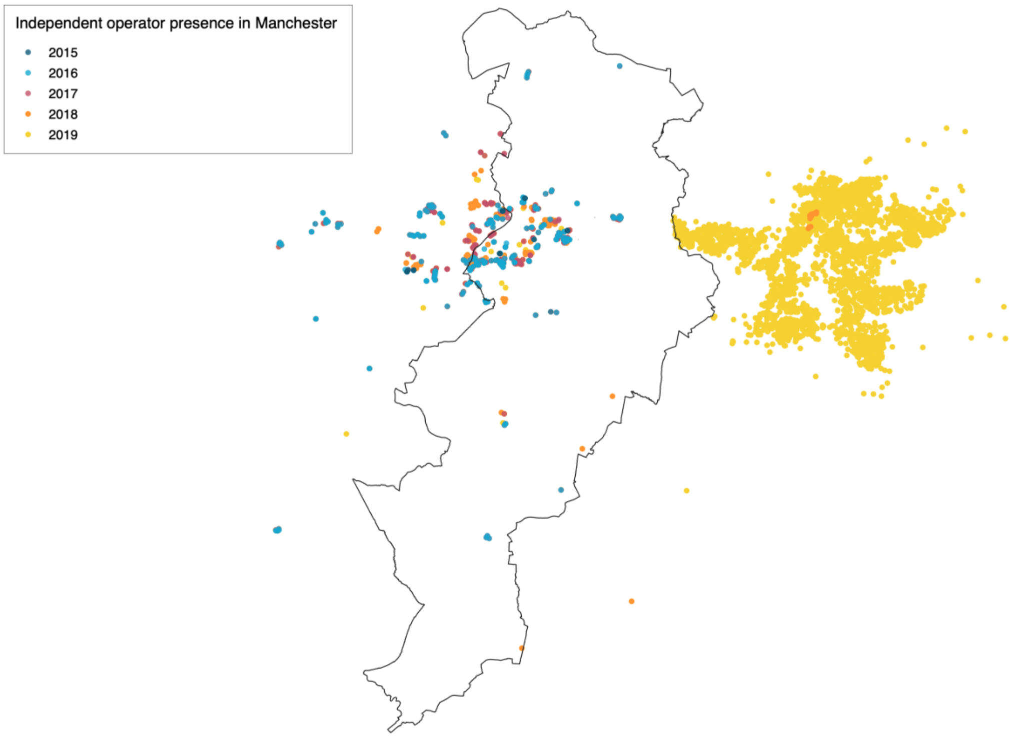


Figure 8: Fixed independent operator presence in Edinburgh

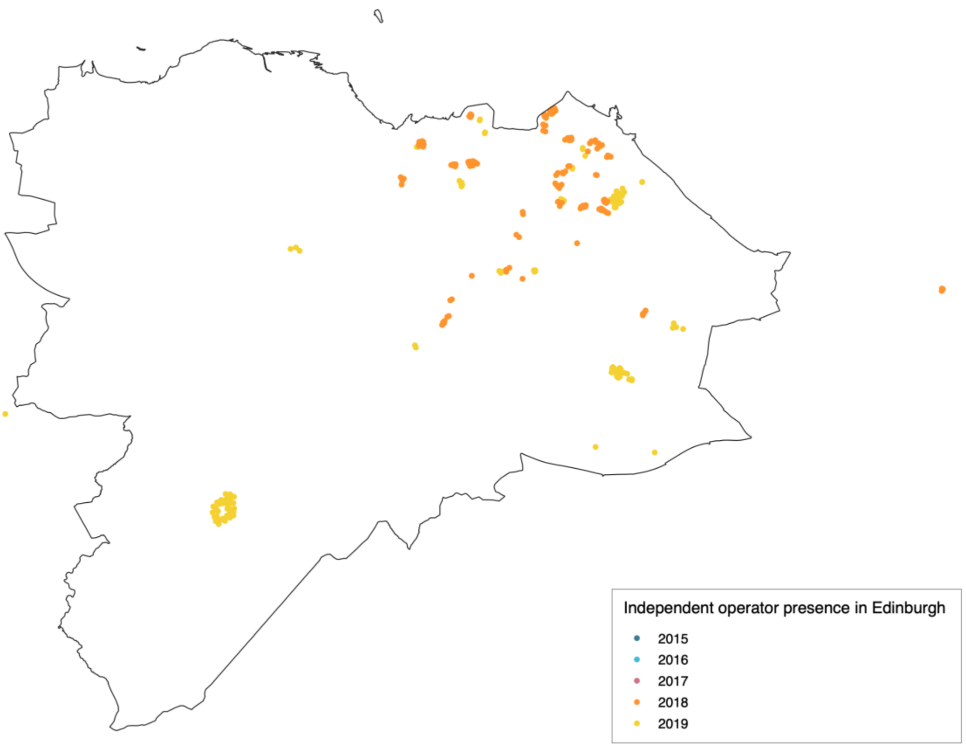
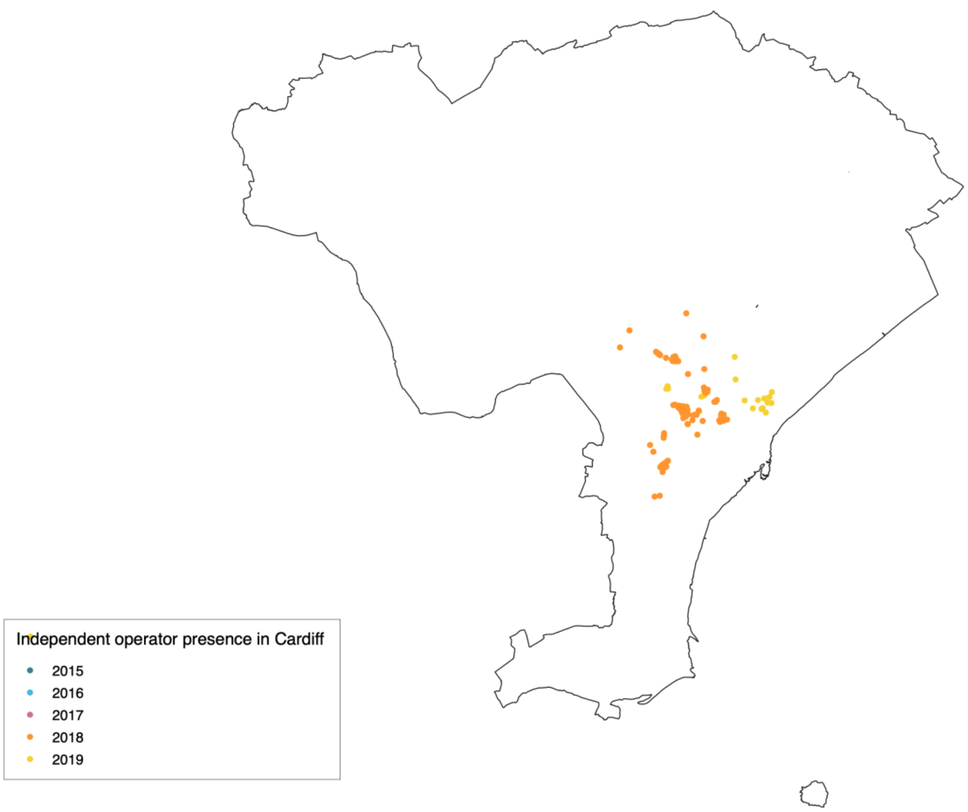


Figure 9: Fixed independent operator presence in Cardiff



6. Independent network sector investment

The past year has continued to see strong interest and engagement from the investment community in the UK's independent network sector. We have gathered together the main financial-related announcements. It is important to note these do not cover the entire sector:

- Over £736 million worth of private funding related to the sector was announced during 2019 and early 2020
- If we include CityFibre's £200 million cash purchase of FibreNation from TalkTalk Group, this comes to over £936 million
- These figures are on top of an estimated £5.7 billion of private investment-related announcements already made in the sector, bringing the total to over £6.6 billion.

Table 3 summarises selected investment-related announcements over the past three years with regard to the independent network operator sector.

Table 3: Investment-related announcements, selected

To end-2017	To end-2018	To March 2020	Accumulative total
£2.55 billion	£3.15 billion	£0.936 billion (including FibreNation sale)	£6.636 billion

Note: Figures cover only part of the sector
See general caveat on page 4
Source: Public announcements and press reports

A number of smaller operators with fixed and FWA networks taking part in our survey this year and last year noted their capex plans for the current financial year (2019/20) and the next financial year (2020/21). We also requested estimated capital expenditure from now until the end of 2025.

We have added additional estimates to those figures collected through the survey for intended spend by independent network operators based on public announcements over time. Table 4 provides a summary.

It is important to note that these figures do not represent the whole sector. We also note that the figures provided and public announcements made are projected capital spending, not actual.

Table 4: Intended capital expenditure, estimates

Current financial year (2019/20)	Next financial year (2020/21)	2020 to end-2025
£426 million	£656 million	£5.419 billion

Note: Figures form only part of the sector; capex relates to intended capital investment, not actual
See general caveat on page 4
Source: Operators taking part in INCA surveys 2020 and 2019; public announcements

A summary of selected financial-related announcements are detailed in Table 5 below. Earlier announcements can be found in our previous report for INCA, Metrics for the UK independent network sector, published in May 2019.

Table 5: Selected independent network operator investment announcements 2019 to 2020

Operator	Investment announcement
B4RN	08/07/2019 surpassed £3 million crowdfunding target via Triodos Bank raising £3.3 million total
Box Broadband	18/09/2019 significant new investment from high net worth individuals
Call Flow Solutions, Trooli	05/06/2019 secured £26.6 million of funding from European investors 07/02/2020 gained a further £5 million of funding via a senior facility agreement with NatWest Bank
CityFibre/Fibre Nation	21/01/2020 bought FibreNation for £200 million in cash. 18/12/2018 debt package of £1.12 billion from seven major financial institutions, ABN AMRO, Deutsche Bank, Lloyds Bank plc, Natixis, NatWest, Santander and Société Générale. Proceeds from infrastructure debt package to be used to fund first part of CityFibre's £2.5 billion investment plan; 23/10/2018 £2.5 billion investment programme reinforcing CityFibre's commitment to connect five million homes to full fibre
Community Fibre	16/07/2019 secured an extra £50 million of funding from its two institutional investors, RPMI and Amber Infrastructure. 23/04/18 £18 million through NDIF and £7 million from private equity investment via Railpen
G.Network	09/03/2020 Reportedly seeking investment boost of around £200 million to accelerate rollout plans. 05/11/18 Closed deal with investment partner Albion Capital resulting in Cube Infrastructure Managers providing initial £60 million of additional funding; already had investment of £4.6 million from Albion
Hyperoptic	14/10/2019 KKR completed the acquisition of a majority stake in Hyperoptic from funds managed by Newlight Partners LP and the Mubadala Investment Company. This followed 07/11/2018 strategic investment from Mubadala Investment Company and 03/08/2018 completed a debt raise of £250 million from eight international banks
ITS Technology Group	07/01/2020 completed £45 million in funding from a deal with Aviva Investors to allow ITS to build several new full fibre networks, as well as to build out its current footprint
Jurassic Fibre	17/04/2019 acquired by Fern Trading to provide funding for an expansion plan that could exceed £250 million over the next few years
Quickline (part of Bigblu)	12/08/2019 secured a £12 million investment comprising a £4 million credit facility from HSBC and £7.75 million from Harwood, with existing investors re-investing
Swish Fibre	17/12/2019 acquired by Fern Trading as part of a long-term funding deal to unlock £250 million of investment
toob	25/03/2019 secured £75 million funding package from Amber Infrastructure Group's National Digital Infrastructure Fund

Source: Independent operators

7. Independent network sector concerns

The INCA survey asked operators to rate how concerned they are about issues in terms of challenge to their network deployment and ability to offer services to and acquire customers – 19 operators provided their views this year.

The top three concerns in 2020 are:

1. Delivery times for services from Openreach or other operators
2. Overbuild by Openreach or other operators
3. Getting wayleaves.

Delivery times for services from Openreach and other operators has become the top concern among survey participants, moving up from second place last year. However, overbuild by Openreach or other operators ranks almost equally as high. This, together with getting wayleaves, has moved up the agenda since last year's survey.

Access to skills and labour is in fourth place, very closely followed by access to finance, access to cost-effective backhaul services, and use of Physical Infrastructure Access (PIA) in that order. But there is very little difference in it for these four concerns.

It is noticeable that planning and street works delays and/or costs, which was last year's top issue, is now relegated to eight place, which suggests that work done by Government and local authorities, in turn pushed by the industry as a whole, may at last be paying dividends.

All these changes are relative and the results do not mean there is more or less concern about particular issues – they merely shed light on the order of priority.

Figure 10 lists the full range of responses, Figure 11 includes previous years' survey results and Figure 12 illustrates changes year-on-year.

Figure 10: Independent network operators' concerns

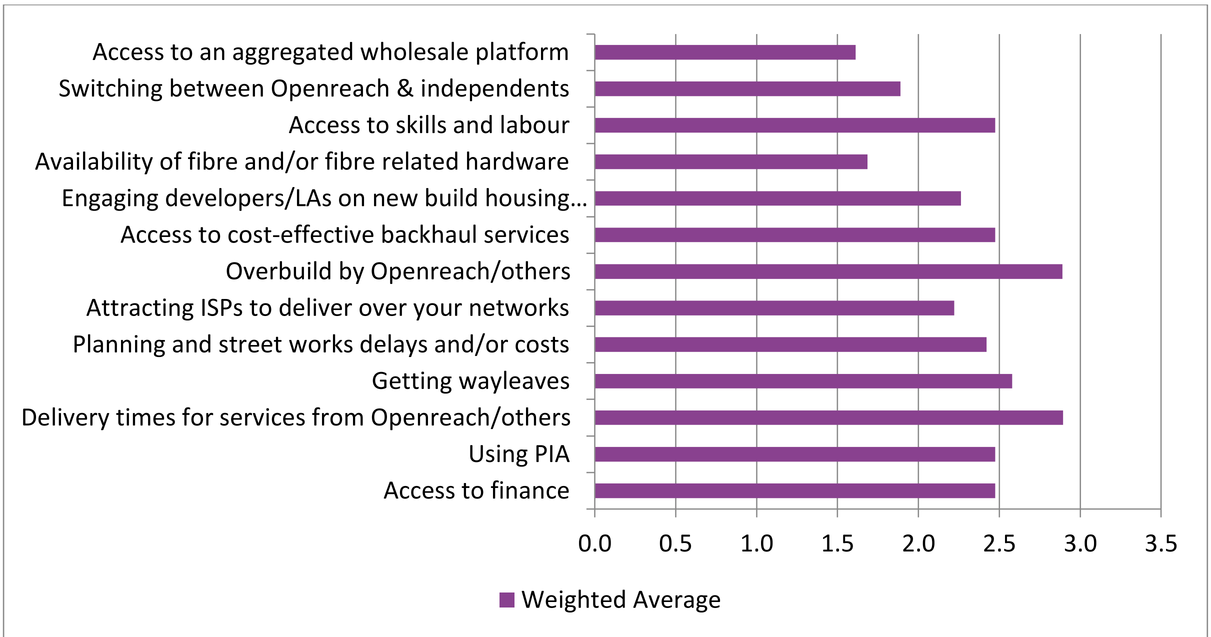


Figure 11: Changing concerns 2018, 2019, and 2020

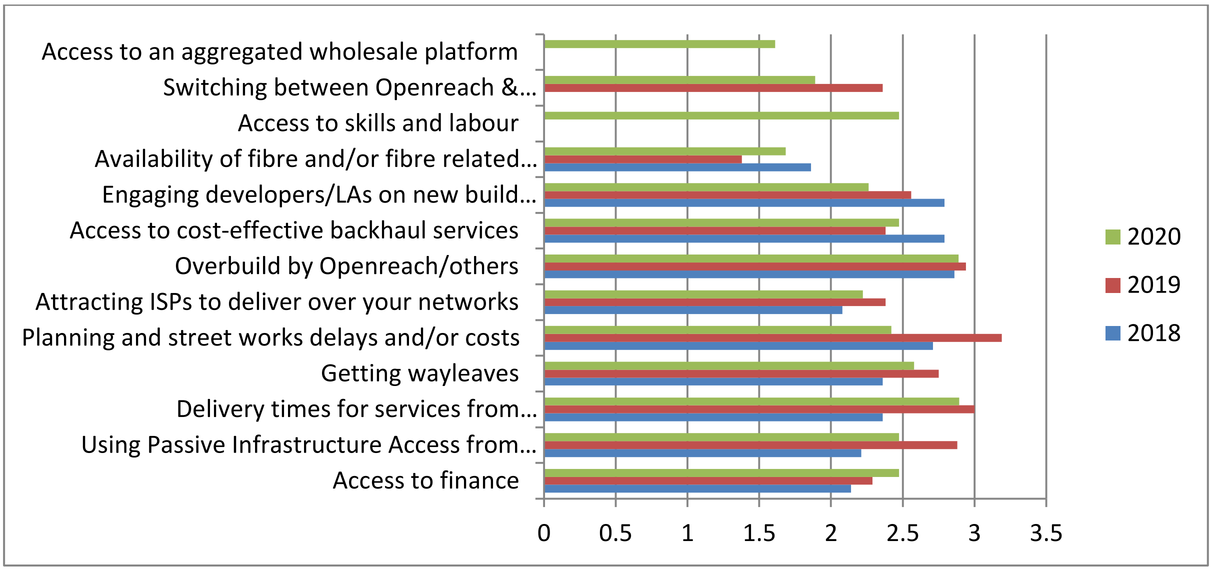
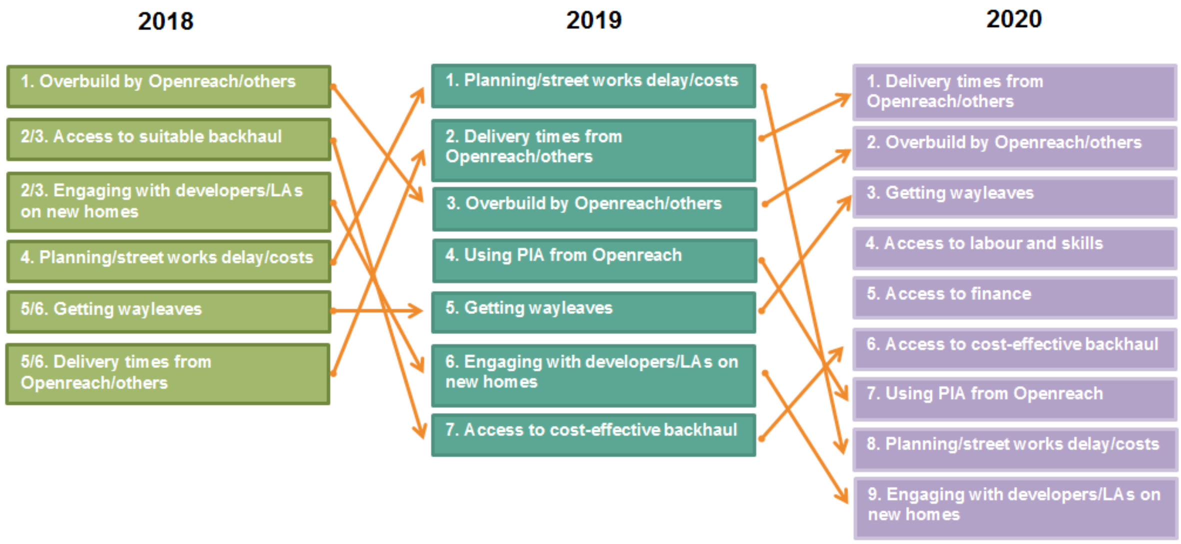


Figure 12: Changing concerns 2019 to 2020



8. Appendix A

INCA/Point Topic independent network survey 2020

Given Ofcom's proposed approach to regulation outlined in Promoting investment and competition in fibre networks – Wholesale Fixed Telecoms Market Review 2021-26, it is vital we present clear evidence of both current coverage by independent network operators and future build plans up to at least 2026. If we fail to do this, we cannot influence Ofcom's decisions.

INCA is therefore continuing its partnership with Point Topic to gather better information about the independent network sector including coverage, plans and key concerns.

The findings from last year's survey are here and resulted in good media exposure highlighting the importance of the independent network sector to policy makers. Your participation in our 2020 survey is even more crucial.

The information collected will be used on an aggregated basis. The results will be used as part of INCA's response to the WFTMR consultation, and will be published in an INCA report. We also welcome responses from non-INCA members and those belonging to other associations including UKWISPA.

Point Topic will also draw on this information to produce its regular six-monthly Ultrafast & Superfast Broadband Update report including its own estimates for premises passed and connected, as well as coverage mapping, which is now carried out in conjunction with Thinkbroadband.

The survey should take around 10 minutes to complete. The deadline for responses is 28 February 2020. It would be really helpful if you are able to answer as many of the questions below as possible. If you prefer we can contact you by phone instead to cover some or all of the questions – please contact Annelise Berendt at Point Topic Direct tel: +44 (0)1279 726 567, annelise.berendt@point-topic.com

If you are not the person in your organisation who can respond to the survey, please forward this url to someone who can. Many thanks for your help.

1. Your Details

Name

Company

Email Address

----

2. What type of networks do you build? (tick all that apply)

	Fibre to the Premises (FTTP, FTTH) active or passive
	Fibre to the Building (FTTB)
	Ethernet
	Fibre to the Cabinet (FTTC) LLU
	FTTC - Fibre to the Node/SLU
	FTTC - G.Fast
	Hybrid Fibre Coax (HFC / DOCSIS 3.x)
	Fixed Wireless Access using unlicensed or lightly licenced spectrum
	Fixed Wireless Access using licenced spectrum
	FWA - Point to Point
	FWA - Point to Multipoint
	Satellite Broadband
	Other (please specify)

3. Is your network accredited to any of the following schemes? (tick all that apply)
INCA Gold Standard
UKWISPA Quality Accreditation
Other (please specify)

4. Coverage
How many premises do your fixed networks pass – split by residential and business?
Note: Ofcom's definition of "full fibre coverage" is "where the network has been rolled out to a 'lead-in' that will serve the consumer end premises and where the consumer would expect to pay a standard installation charge for that connection".

	Residential	Business	Total
End-December 2019			
Do you anticipate by the end of 2020			
Your longer term aspiration by the end of 2025			

Please provide your definition of "pass" if this varies and/or you use a different network technology.

5. How many premises are within coverage range of your fixed wireless networks – split by residential and business?

	Residential	Business	Total
End-December 2019			
Do you anticipate by the end of 2020			
Your longer term aspiration by the end of 2025			

Please provide your definition of "within coverage range".

6. How many end-users are connected to your fixed networks – split by residential and business? split by wholesale and retail?

	Residential	Business	Wholesale	Retail	Total
End-December 2019					
Do you aim to connect by the end of 2020					
Your longer term aspiration by the end of 2025					

7. How many end-users are connected to your fixed wireless networks – split by residential and business? split by wholesale and retail?

	Residential	Business	Wholesale	Retail	Total
End-December 2019					
Do you aim to connect by the end of 2020					
Your longer term aspiration by the end of 2025					

8. What is your overall capital expenditure?
Current financial year
Next financial year
Estimated spend from now to end 2025

9. How much do you spend on operating and maintaining the network/s?
Current financial year
Next financial year
Estimated spend from now to end 2025

10. How would you rate the following issues in terms of their challenge to your network deployment and ability to offer services to and acquire customers?

Please rate issues on a scale from 1 – 'Not an issue' to 5 – 'Very significant challenge'

	Access to finance
	Using Physical Infrastructure Access from Openreach
	Delivery times for services from Openreach or other operators (e.g. EAD circuits)
	Getting wayleaves
	Planning and street works delays and/or costs
	Attracting service providers to deliver services over your networks
	Overbuild by Openreach or other operators
	Access to cost-effective backhaul services
	Engaging with developers and/or local authorities on new build housing plans

	Availability of fibre and/or fibre related hardware
	Access to skills and labour
	Switching between Openreach and independent networks e.g. through the Gaining Provider Led Switching process being developed by OTA/Ofcom
	Access to an aggregated wholesale platform

11. Please note any specific comments that you may have on the above or on other issues

----

12. What do you value about INCA services and what do you think should be changed?

Please rate on a scale from 1 – 'Not useful' to 5 – 'Very useful'

	INCA's Events programme including the annual Conference and Awards dinner
	Policy and regulatory work to put forward sector-wide views to Government and Ofcom
	The INCA Gold Standard Quality Mark to establish public quality standards amongst independent networks
	Work to support switching and wholesale processes with independent networks
	Promotion of the sector through events, media and social media activities
	Networking between members including operators, suppliers, local authorities and consultants

Is there anything that INCA is not doing that you think we should put resources into?

----

13. Postcodes – In line with our approach to the Ofcom consultation Promoting investment and competition in fibre networks – Wholesale Fixed Telecoms Market Review 2021-26 it is very important to gather robust information that can be aggregated to influence Ofcom's understanding of the sector.

Please provide existing coverage postcodes and intended build postcodes (and/or other premises data) ideally up to April 2026. These will be used by INCA on an aggregated basis in its response to Ofcom.

Point Topic would also like to use these postcodes and/or premises data in order to map the coverage of broadband networks. It works with Thinkbroadband to do this and therefore shares this data with its partner accordingly.

The preferred format is an Excel sheet listing coverage data split by present and future (by year if available), if possible noting maximum speeds available to end users in each location if this varies – email to annelise.berendt@point-topic.com or tick the option below to be contacted by us:

Please contact me on

DONE - THANK YOU FOR YOUR HELP