

# NGA broadband

Where are we and what are we working on

Chris Garcia

South West Regional Development Agency

[www.southwestrda.org.uk](http://www.southwestrda.org.uk)



# Objectives for today

- **Current landscape**
- **Our existing strategy**
- **What we've started work on**



# Current landscape

**As a geographically large region with the challenges of peripheral places, the NGA agendas can benefit us:**

- **A more low carbon and resource efficient region**
- **High value added businesses**
- **Transformational places**
- **Overcoming deprivation**



# Digital in the South West of England

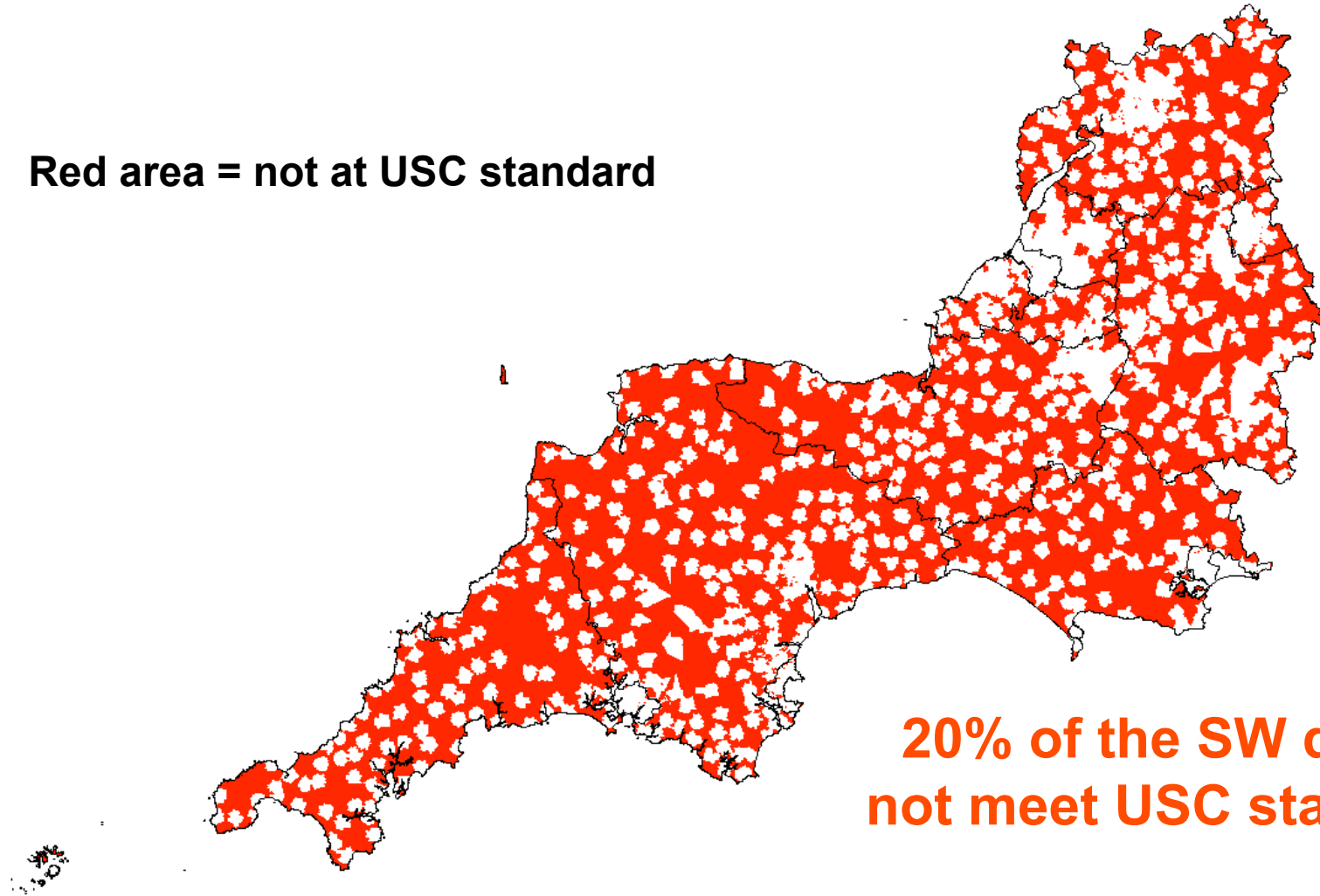
- **Digital reaches beyond media and communications into many market sectors. Already support for communications-enabled innovation:**
  - **Creative Industries: Accessing and commercialising content in a digitally networked world**
  - **Health: e.g. Assisted Living, Informatics**
  - **Transport: Intelligent transport systems and services**
  - **Energy and built environment: Smart grid and smart meters (DECC) and smart homes**
  - **Education: Social inclusion.**
- **We have the fastest growing digital and creative media sector in the UK with established supply chains and support networks alongside world class content strengths**

**Critical that the region continues to be at the forefront of the Digital and Next Generation Access revolution and the development of the digital economy**

# Areas that do not currently meet the USC



Red area = not at USC standard



20% of the SW does not meet USC standard

# Proportion not meeting the USC

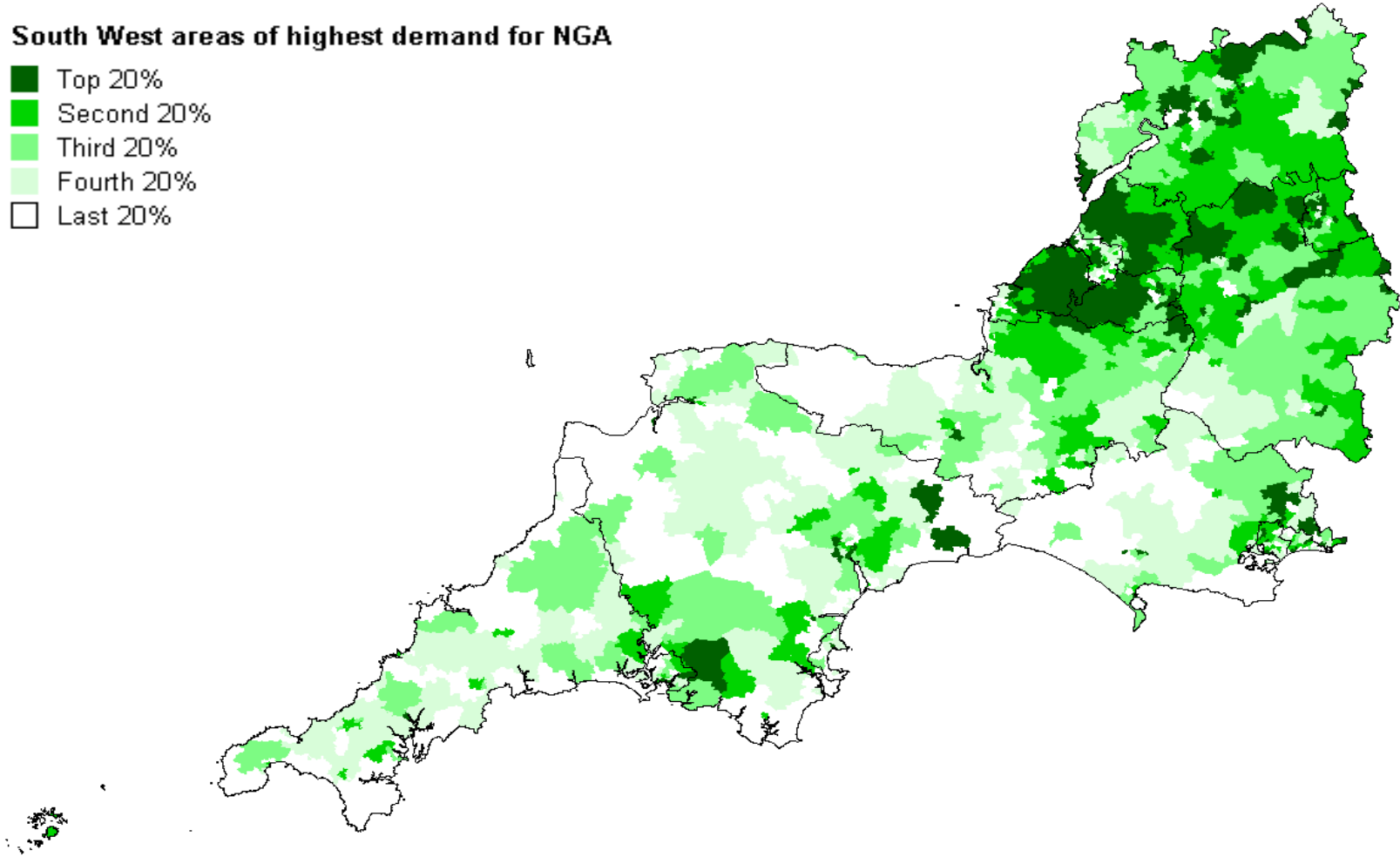
Bath and the North East	21%
Bournemouth	11%
Bristol City	6%
Cornwall	22%
Devon	24%
Dorset	24%
Gloucestershire	25%
Isles of Scilly	22%
North Somerset	12%
Plymouth	13%
Poole	21%
Somerset	21%
South Gloucestershire	22%
Swindon	26%
Torbay	10%
Wiltshire	18%
South West	20%
UK average	11%

# Demand for NGA



## South West areas of highest demand for NGA

- Top 20%
- Second 20%
- Third 20%
- Fourth 20%
- Last 20%



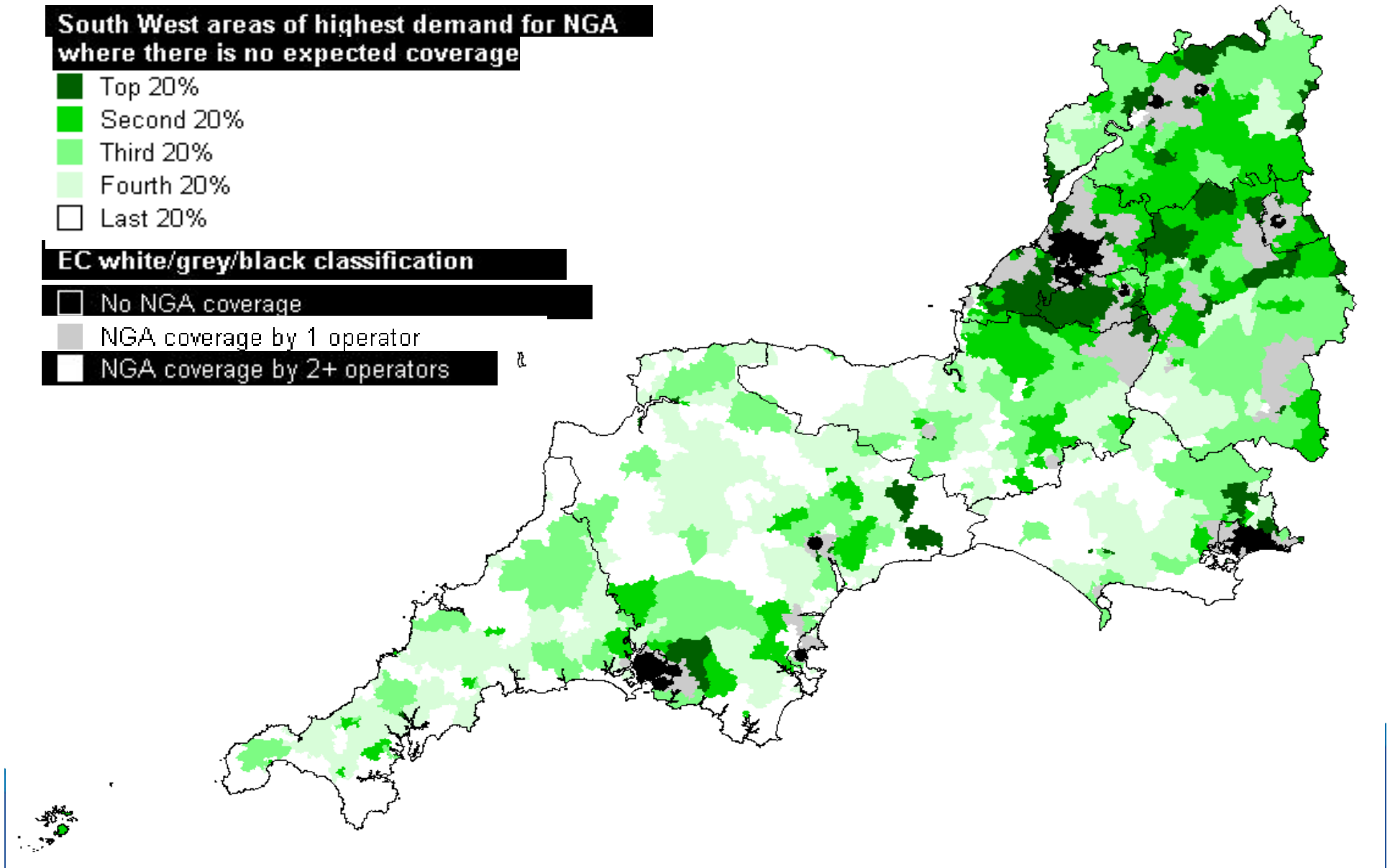
# Demand v Supply in 2012

## South West areas of highest demand for NGA where there is no expected coverage

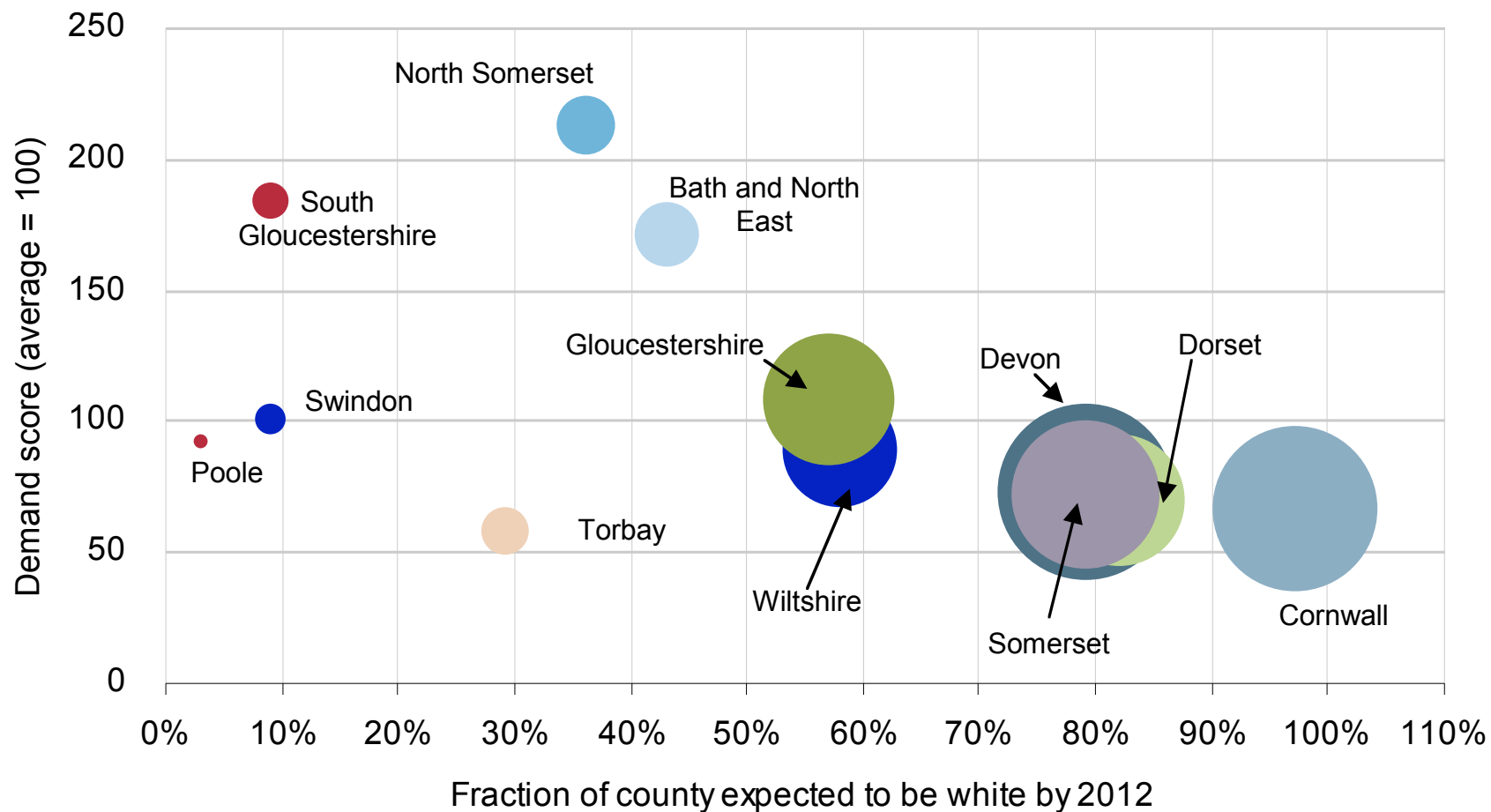
- Top 20%
- Second 20%
- Third 20%
- Fourth 20%
- Last 20%

## EC white/grey/black classification

- No NGA coverage
- NGA coverage by 1 operator
- NGA coverage by 2+ operators



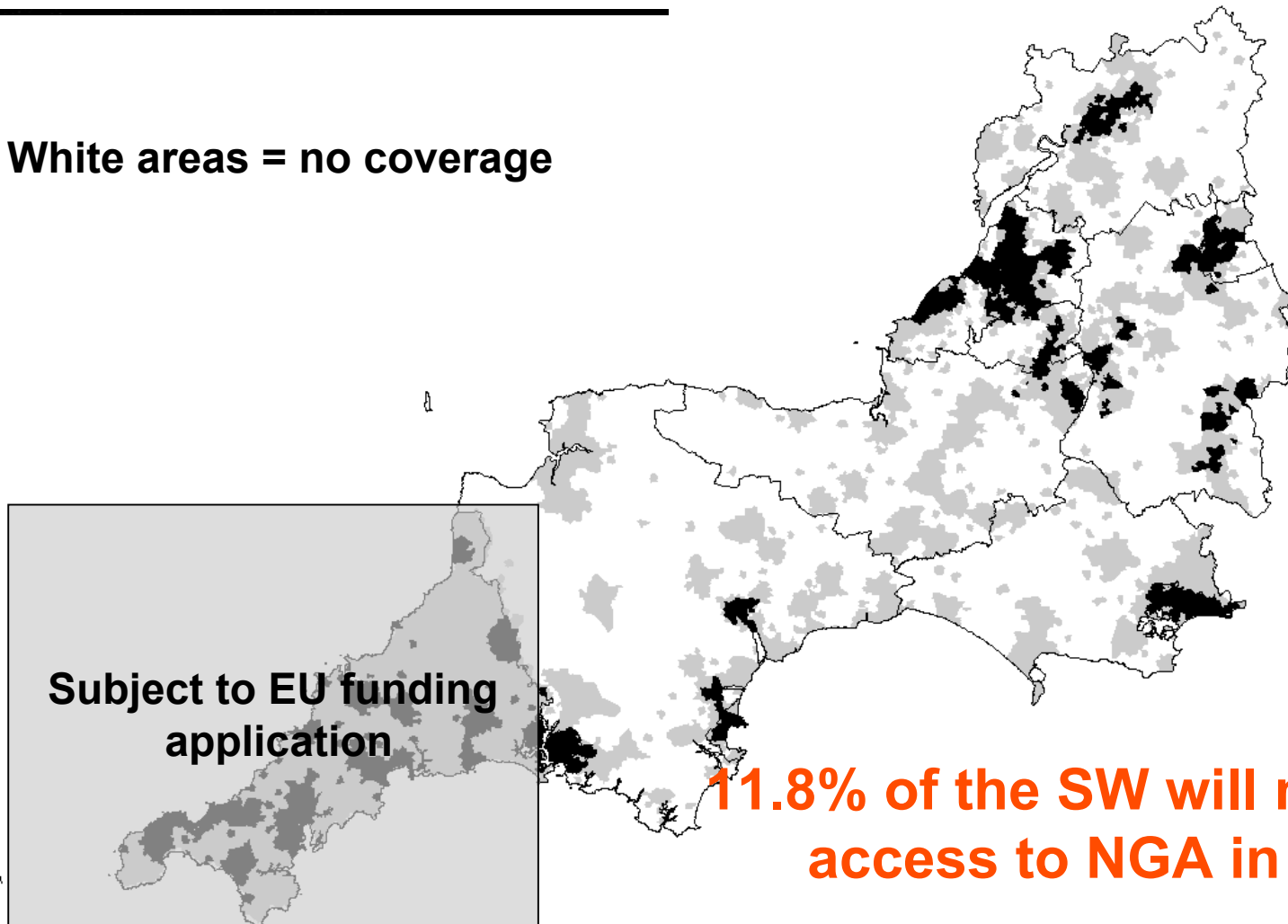
# Demand v Supply Challenge



# Most optimistic projection of NGA availability



White areas = no coverage



**11.8% of the SW will not have access to NGA in 2017**

# RDA response to the need for a Digital Britain

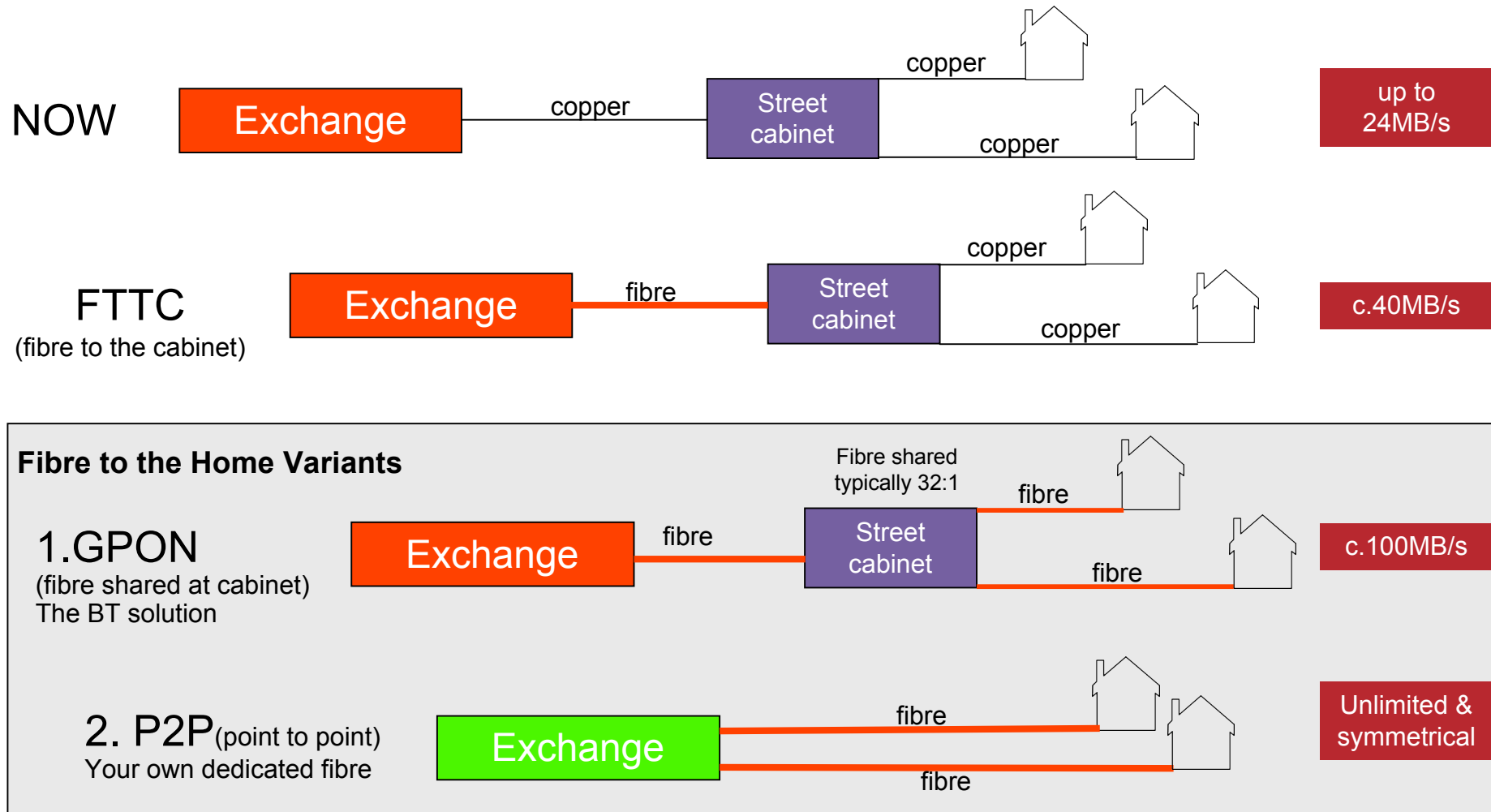


RDA's have jointly identified four key principles for delivering a Digital Britain:

- The internet is a *General Purpose Technology* which should be affordable, accessible and used by all.
- A 'two-speed' Next Generation Digital Britain would diminish UK competitiveness.
- Fibre should be pushed deeply into the network to future proof investment and UK competitiveness.
- Intelligent procurement across the public sector estate should be used to further demand for next generation broadband networks.

# Technology choices determine speeds

(the big difference is that in rural locations you have limited if any technology choices)



# Broadband options for the UK

Need to embed the principle that rural communities should have the same opportunities that will be found in urban areas – specifically fibre P2P.

In descending order of desirability:

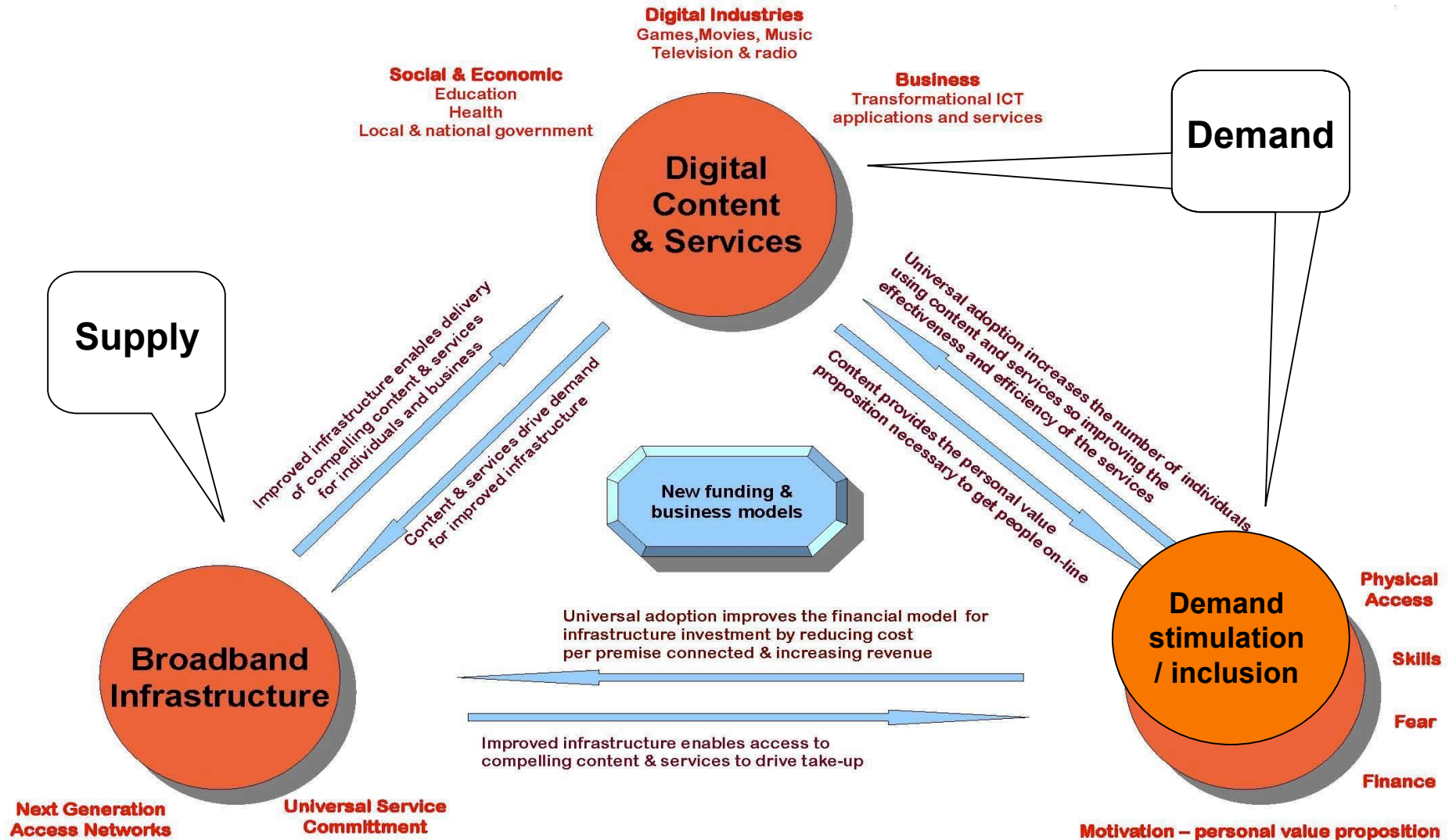
- Fibre to the Premises – PTP
- Fibre to the Premises – GPON
- Fibre to the Cabinet
- ADSL and variants
- Long Range Wireless
- Satellite



# Developing a SW Digital Strategy Draft



## : Our three pillars



## In summary: Strategic problems for a region with a high proportion of rural areas

The telcom industry business model for broadband investment has always left rural economies lagging – and without intervention will continue to do so.

That same commercial logic of the telcoms industry will mean that rural locations will never see widespread fibre deployment (because of expensive dig cost) so will potentially **always** lag behind urban.

The strategic analysis in Digital Britain (Two thirds/Final Third) is broadly right. This implies that regardless of which Government is in office there will be a persistent rural broadband problem.

## What we've started work on

- ❖ Advocate and promote the needs of the region so investment is brought forward as quickly as possible
- ❖ Stimulate demand to make the business case stronger for private sector investment
- ❖ Actively work alongside partners to leverage investment
- ❖ Application of new delivery models to provide as fast as possible broadband access as is practical

Asking how much speed we need is the wrong question

The right question is  
“what will ‘future proof’ our broadband investment”



chris.garcia@southwestrda.org.uk

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