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Llywodraeth Cymru  
Welsh Government

Welsh Government  
Summary of Responses

# Next Generation Access Broadband Public Consultation

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## **Terminology used in this document**

### **Next Generation Access (NGA) broadband infrastructure**

The physical structures required for the operation of superfast broadband services delivering speeds of at least 30Mbps.

### **Open Market Review (OMR)**

An exercise carried out with the market to determine expected private sector deployment of NGA broadband in order to identify those areas which have no qualifying broadband infrastructure or where there are no plans to provide such infrastructure over the next three years.

### **White premises**

Premises which do not have access to a qualifying NGA network, or where there are no plans to provide such infrastructure over the next three years.

### **Grey premises**

Premises where only one qualifying NGA network is present or only one network is due to be deployed within the next three years.

### **Black premises**

Premises where at least two qualifying NGA networks of different operators exist or are due to be deployed within the next three years.

### **Out of scope premises**

Premises which are already subject to other publicly funded arrangements and have therefore been excluded from any future public sector intervention.

### **Under review premises**

Premises which suppliers have indicated as having current or planned qualifying NGA network within the next 3 years. However, either the upgrade has not been completed or the network has been reported as being 'at risk' of being able to deliver such services to premises. Therefore, these premises will be subject to continued monitoring. In the event these plans are not delivered and/or the identified network ceases to operate these premises will be defined as white and may form part of the intervention area.

### **Filtered premises**

The consultation dataset removed premise classifications which were believed unlikely to represent structures eligible for a superfast broadband service – for example: wind turbines, bus shelters, and aqueducts. However, these premises were still included within the interactive consultation map as 'filtered premises'.

### **Unique Property Reference Number (UPRN)**

A unique identifier for every spatial address in Great Britain. It provides a comprehensive, complete, and consistent identifier throughout a property's life cycle – from planning permission through to demolition.

## Summary

The Next Generation Access Broadband public consultation was undertaken from 13<sup>th</sup> June 2017 to the 27<sup>th</sup> July 2017.

The objective of the public consultation was to confirm the premises in Wales which do not have Next Generation Access (NGA) broadband infrastructure delivering at least 30Mbps, or where there are no plans to provide such infrastructure over the next three years.

This Summary of Responses document outlines, at a high level, the responses received by the Welsh Government to the public consultation and summarises the next steps in the process.

The public consultation process enabled telecommunications companies and all other interested stakeholders to provide information on their broadband plans, coverage and their comments on the mapping of; black, grey, white, out of scope, under review and filtered premises and postcodes based on the information gathered during the previous Open Market Review (OMR).

The information gathered through the OMR process and subsequent public consultation will help the Welsh Government determine where, in the absence of private sector investment in broadband infrastructure delivering at least 30Mbps, the next phase of NGA procurement should be focussed to meet the remaining few percent of eligible white premises (premises in the areas where no NGA operator exists now, nor are planned to exist within the next three years).

Following completion of the public consultation, the Welsh Government has now updated and amended the agreed intervention area (consisting of NGA white and under review premises). Final proposals for the intervention area, taking account of the outcome of the public consultation, will be submitted to BDUK's National Competence Centre for clearance and approval to proceed to the procurement stage.

## Background

The Superfast Cymru project is striving to extend the availability of NGA broadband infrastructure across Wales and aims to deliver 690,000 premises with access to superfast broadband delivering download speeds of at least 30Mbps, with further premises benefitting from over 24Mbps. The project aims to be completed by December 2017.

The Welsh Government conducted its first Open Market Review (OMR) and public consultation in 2012. Following this OMR and subsequent procurement process, the contract to deliver superfast broadband to premises within a defined intervention area across Wales was awarded to British Telecommunications (BT) Plc on 19th July 2012 with State Aid approved public funding of £205m.

The Welsh Government conducted its next OMR and public consultation between 3rd June and 3rd July 2014, as a precursor to incorporating further superfast broadband coverage by enacting a Change Request with British Telecommunications (BT) Plc to cover a further defined Intervention Area with State Aid approved public funding of £19.4m.

The c. £225m of funding allocated to date aims to facilitate the delivery of superfast broadband coverage to 690,000 premises within the intervention area by December 2017 and in line with the UK Government's targets, the Welsh Government is seeking to further increase superfast coverage by the end of 2020.

The Welsh Government now intends to conduct a further procurement in respect of the remaining premises across Wales without NGA broadband infrastructure. To facilitate this procurement, an OMR was undertaken from the 5<sup>th</sup> January 2017 to the 3<sup>rd</sup> February 2017 to confirm the areas across Wales which do not have NGA broadband infrastructure. The subsequent public consultation which ran from the 13<sup>th</sup> June 2017 to the 27<sup>th</sup> July 2017 gave telecommunications suppliers the opportunity to confirm the overarching results of the OMR as well as providing interested stakeholders with the chance to provide comments and recommendations on the upcoming procurement, Superfast Cymru and the methodology adopted when defining the intervention area.

## Consultation Details

### Duration:

The public consultation was open from 13<sup>th</sup> June 2017 to 13<sup>th</sup> July 2017 with a further extension granted until the 27<sup>th</sup> July 2017.

It was publicly announced by the Minister for Skills and Science on the 13th June 2017 alongside press releases on 13<sup>th</sup> and 26<sup>th</sup> June to encourage the public to respond to the consultation.

To ensure market engagement was as wide as possible, a link to the consultation website was issued to all suppliers who responded to the original OMR with continuing direct communication up to and throughout the consultation period

As well as encouraging suppliers to respond to the consultation the Welsh Government was keen to hear from local authorities. Views were sought not only on the accuracy of the mapping data but also to gather any comments on how the Welsh Government might approach the next round of procurement to best target resources.

All Welsh local authorities and their digital champions were contacted directly to encourage them to review the public consultation.

### Website Location:

<https://consultations.gov.wales/consultations/next-generation-access-broadband>

### Launch of Public Consultation:

<http://www.senedd.tv/Meeting/Archive/7333d028-45a9-46e6-80c9-55015df7a024?autostart=True#>

### Launch Press Release:

<http://gov.wales/newsroom/science-and-technology/2017/170613-tell-us-about-your-broadband-needs/?lang=en>

## Summary of Telecommunication Supplier Responses

In total, the Welsh Government received seven public consultation submissions from telecommunications suppliers which were evaluated as part of the consultation process. The full results and conclusions are outlined in the final *Welsh Government Open Market Review (OMR) Next Generation Access Broadband OMR and Public Consultation Report 2017*, dated October 2017, subject to BDUK's approval.

The details of these telecommunications suppliers who responded to the consultation are outlined below along with a high-level view of how the Welsh Government treated their broadband coverage data when determining the

final intervention area across Wales. In addition to the summary below a high-level overview of how each telecommunication suppliers' response has been considered by the Welsh Government in defining the intervention area is shown in Table 1. This includes those telecommunication suppliers who submitted broadband data during the original OMR consultation process.

All public consultation responses received by the Welsh Government from telecommunication suppliers are subject to business confidentiality clauses and therefore will not be published in full.

**Table 1:** Summary of Telecommunication Supplier Responses and Broadband Data Submitted

Telecommunication Supplier	Total Premises Provided (UPRNs)	Total Postcodes Provided	Data Used to Define IA	NGA Classification(s)
Airband	-	507	✓	Premises served flagged as Grey or Black
Bentley Walker	-	-	x	-
Broadway Partners	-	848	x	-
BT Openreach	1,588,493 of which 114,416 were sub 30Mbps	-	✓	Premises served flagged as Grey, Black or Under Review
Dyfed IT Solutions	-	-	x	-
Fibrespeed	-	-	x	-
Gigaclear	3	-	✓	Premises served flagged as Grey or Black
ITS Technology	-	5,477	✓	Under Review
Net Support UK	-	-	x	-
Rural Technologies	-	22	✓	Under Review
TFL-Group	247,722	-	x	-
Virgin Media	-	13,843 serviceable postcodes  342 postcodes flagged as announced therefore having NGA services available shortly  306 postcodes identified within their 2017 build plan (however, all but 4 were duplicated postcodes)  Following review by BDUK a further 13 VM postcodes also identified as within VM's coverage footprint	✓	Premises served flagged as Grey, Black or Under Review

**Provider:** Broadway Partners

**Received:** 10<sup>th</sup> July 2017

**Summary:** Broadband Partners did not provide an official response to the Welsh Government during the OMR process. However, it did respond to the public consultation with some information regarding its network, including an outline coverage claim for postcodes in Monmouthshire.

**Conclusion:** As the submission from Broadway Partners was not an official response to the consultation, and there were some gaps regarding its technical and business evidence, it was concluded that its broadband coverage within Monmouthshire would not be removed from the final intervention area.

A conclusion letter explaining the Welsh Government's assessment of Broadway Partners network and its final position regarding its broadband coverage was sent via e-mail to Broadway Partners on the 29<sup>th</sup> September 2017.

**Provider:** BT Openreach

**Received:** 9<sup>th</sup> October 2017

**Summary:** Throughout the public consultation process there were various OMR datasets sent by BT Openreach to the Welsh Government containing details of Openreach's broadband coverage across Wales. Further clarification of the OMR datasets was required during the consultation process. The Welsh Government made the decision to extend the deadline of the consultation process in order to work with BT Openreach to refine the premise level broadband coverage data to ensure this was as accurate as possible in defining the intervention area and prior to starting any procurement. This final dataset was used by the Welsh Government to identify premises which were due to be built by Openreach (with access to speeds above 30Mbps).

**Conclusion:** Based on the revised OMR dataset provided by BT Openreach, all premises indicated within Openreach's response as already being served with NGA services (>30Mbps) or planned to be served within the next 3 years have been excluded from the intervention area and classified as either grey or black. Any premises within the current Superfast Cymru intervention area which have not yet been verified at 30Mbps but are in the build plan (claimable at 30Mbps) were also excluded from the intervention area and classified as premises 'under review'. In the event that any such 'under review' premises do not receive access to superfast broadband through the current intervention, these premises will be mapped as white and may subsequently form part of the proposed intervention area.

A conclusion letter explaining the Welsh Government's assessment of Openreach's network and its final position regarding its broadband coverage was sent via e-mail to BT Openreach on the 24<sup>th</sup> October 2017.

**Provider:** Dyfed IT Solutions

**Received:** 13<sup>th</sup> July 2017

**Summary:** Dyfed IT Solutions did not provide an official response to the Welsh Government during the OMR process. However, it did respond to the public consultation with some information regarding its network.



**Conclusion:** As the submission from Dyfed IT Solutions was not an official response to the consultation, and there were some gaps regarding its geographical, technical, and business evidence including providing any details of premises covered by its network solution, it was concluded that its broadband coverage would not be removed from the final intervention area and was therefore discounted.

A conclusion letter explaining the Welsh Government's assessment of Dyfed IT Solutions network and its final position regarding its broadband coverage was sent via e-mail to Dyfed IT Solutions on the 29<sup>th</sup> September 2017.

**Provider:** ITS Technology

**Received:** 4<sup>th</sup> July 2017 with revised data provided 26<sup>th</sup> July 2017

**Summary:** ITS Technology reviewed the proposed intervention area during the public consultation and identified a further 70 postcodes (equating to 98 premises) which were labelled white but appeared within ITS Technology's existing coverage footprint. In addition, ITS Technology also provided a revised OMR dataset submission on the 26<sup>th</sup> July 2017 which contained details of the postcodes identified.

**Conclusion:** Given the evidence submitted during both the OMR and public consultation process, ITS Technology's postcode coverage has been removed from the intervention area. However, given that ITS Technology's network coverage claim remains substantial, and the network upgrade programme is currently on-going, these premises have been classed as 'under review' within the final NGA intervention maps. In the event ITS Technology's commercial plans are not delivered then these premises will be mapped as white and may form part of the proposed intervention area.

A conclusion letter explaining the Welsh Government's assessment of ITS Technology's network and its final position regarding its broadband coverage was sent via e-mail to ITS Technology on the 29<sup>th</sup> September 2017.

**Provider:** Net Support UK

**Received:** 13<sup>th</sup> July 2017

**Summary:** Net Support UK did not provide an official response to the Welsh Government during the OMR process. However, it did respond to the public consultation with some information regarding its network as well as some suggestions for the upcoming procurement.

**Conclusion:** As the submission from Net Support UK was not an official response to the consultation, and there were some gaps regarding its geographical, technical, and business evidence including providing any details of premises covered by its network solution, it was concluded that its broadband coverage would not be removed from the final intervention area and was therefore discounted.

**Provider:** Rural Technologies

**Received:** 11<sup>th</sup> July 2017

**Summary:** Rural Technologies provided some information to support its OMR submission. However, following the public consultation it provided additional evidence regarding its network including technical details and location information on premises covered by its network solution.

**Conclusion:** Given the combined evidence submitted by Rural Technologies during both the OMR and public consultation process, the postcodes identified by Rural Technologies as within its coverage footprint have been removed from the final intervention area. However, given that Rural Technologies consultation submission still had some information gaps regarding coverage, including business and technical aspects– these postcodes have been classified as ‘under review’ within the NGA intervention maps. Therefore, postcodes in these areas will be subject to continued monitoring, verification, and assurance by the Welsh Government of Rural Technologies’ plans, including any upgrade plans. If the commercial network or its upgrade plans are not delivered then these postcodes will be mapped as white and may form part of the proposed intervention area.

A conclusion letter explaining the Welsh Government’s assessment of Rural Technologies network and its final position regarding its broadband coverage was sent via e-mail to Rural Technologies on the 29<sup>th</sup> September 2017.

**Provider:** TFL Group

**Received:** 17<sup>th</sup> July 2017

**Summary:** During the OMR process TFL provided some information on its network’s technical capabilities and design in supporting the premises within its coverage footprint and providing NGA services. TFL responded to the public consultation expressing views on how the Welsh Government could prioritise future public funding to ensure it is used effectively to cover premises. TFL also provided its views on procurement and lot structures. It did not submit any new or additional information and/or data regarding their network.

**Conclusion:** Further technical detail and assurances over TFL’s network and how its solution would cover the large areas of Wales it outlined is required. For this reason, TFL’s coverage area has not been removed from the final intervention area.

A conclusion letter explaining the Welsh Government’s assessment of TFL’s network and its final position regarding its broadband coverage was sent via e-mail to TFL on the 29<sup>th</sup> September 2017.

**Provider:** Virgin Media

**Received:** 27<sup>th</sup> July 2017 with an update provided 3<sup>rd</sup> August 2017

**Summary:** Virgin Media reviewed the proposed intervention area during the public consultation and identified a further 34 postcodes which were labelled ‘white’ but which appeared within Virgin Media’s existing coverage footprint. These 34 postcodes were in addition to the 13,809 postcodes already provided by Virgin Media during the original OMR consultation. Virgin Media also provided updated postcode data on its ‘Supercharging Local Communities’ initiative as well as revised postcode data on its 2017 build plan. Additional postcode coverage for Virgin Media was also provided by BDUK.

**Conclusion:** The original 13,809 postcodes submitted by Virgin Media during the OMR along with the 34 additional postcodes which Virgin Media identified as being serviceable, the revised postcode data submitted during the consultation relating to its ‘Supercharging Local Communities’, (342

postcodes) and the 13 postcodes highlighted by BDUK will be removed from the final intervention area and classed as grey or black within the NGA intervention maps. The revised postcodes issued during the consultation relating to its 2017 build plan (which consisted of 4 postcodes) will also be removed from the final intervention area but will be classified as ‘under review’ given network rollout for these postcodes has not yet started. Therefore, these ‘under review’ postcodes (and associated premises) will be subject to continued monitoring, verification, and assurance by the Welsh Government of Virgin Media’s deployment plans. If the commercial network upgrade is not delivered as planned, then these postcodes will be mapped as white and may form part of the proposed intervention area.

A conclusion letter explaining the Welsh Government’s assessment of Virgin Media’s network and its final position regarding its broadband coverage was sent via e-mail to Virgin Media on the 29<sup>th</sup> September 2017.

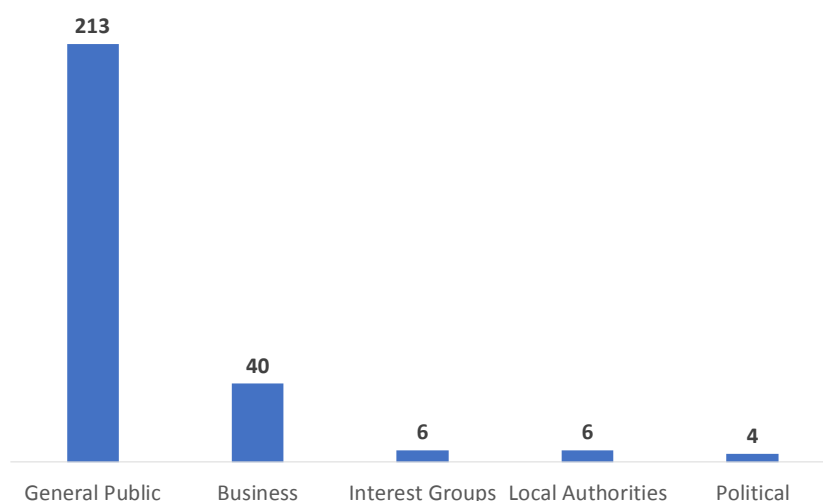
### Summary of non-Telecommunication Supplier Responses

In addition to the 7 telecommunication supplier responses received in response to the public consultation, the Welsh Government also received a total of 269 email responses from non-telecommunication suppliers including consumers, businesses, interest groups and local authorities.

A summary of the analysis and findings of the 269 emails is shown below in Figure 1 and further described below:

- The total number of non-telecommunication supplier responses received during the public consultation was 269. Of this the largest proportion of responses received was from the general public (79%) with responses from businesses making up 15%. In total, the Welsh Government also received 6 responses from interest groups (2%), a further 6 responses from local authorities (2%) and 4 responses from politicians (1%).

**Figure1:** Type of Respondent to the Public Consultation



Of the 269 consultation responses received, the largest number were located in Flintshire (26%), Powys (13%) and Monmouthshire (11%).

**Table 2:** Location of Public Consultation Responses

<b>Local Authority</b>	<b>Number of Responses to consultation</b>
Flintshire County Council	71
Powys County Council	35
Monmouthshire County Council	29
Pembrokeshire County Council	20
Denbighshire County Council	15
Wrexham County Borough Council	15
Gwynedd Council	11
Ceredigion County Council	10
Carmarthenshire County Council	8
City and County of Swansea Council	7
Caerphilly County Borough Council	6
Conwy County Borough Council	5
Isle of Anglesey County Council	3
Newport City Council	2
Rhondda Cynon Taf County Borough Council	2
Bridgend County Borough Council	1
City of Cardiff Council	1
Torfaen County Borough Council	1
Vale of Glamorgan Council	1
Michaelston-y-Fedw Community Council	1
<i>No address details provided or interest group</i>	25

- Of the 257 responses received from members of the public, businesses and politicians the overall key themes highlighted included:
  - A lack of available NGA broadband at certain premises or within their area (81%)
  - A lack of suitable NGA broadband connectivity which was affecting either quality of life and/or businesses (18%)
  - Overall progress of Superfast Cymru and/or BT Openreach (13%)
  - Perceived quality issues with broadband connections (such as speed and/or inconsistent throughput, VoIP calls dropping etc.) (12%)
  - Respondents believing their premise had been incorrectly

- classified on the NGA map as either white or grey (11%)
- Of the 12 responses received from local authorities and interest groups the overall key themes highlighted included:
  - The overall progress of Superfast Cymru and/or BT Openreach (16%)
  - The impact of NGA connectivity patterns across the region (16%)
  - Recommendations for the upcoming intervention area procurement including lot structure, delivery models and contractual inclusions (16%)
  - Emphasising the importance of NGA broadband within local communities, in order to improve employment and economic growth (13%)
  - Identification of certain premises and/or postcodes or industries/businesses which should be prioritised within the intervention area (13%)
  - Information concerning the classification of premises within the NGA maps (10%)
- Other issues highlighted by local authorities included
  - Concern that the current 30Mbps target was not sufficient for future applications such as ultra-high definition TV services
  - Concern that 'under review' premises would be overlooked by the Welsh Government and would therefore not be accounted for in either the current Superfast Cymru project nor included in any future procurement(s) for intervention area(s) by the Welsh Government
  - Concern that some local authorities were delaying the rollout of digital services across their constituencies due to levels of superfast broadband infrastructure.
- In addition, some local authorities raised the following points regarding:
  - The potential inclusion of premises supported by the Access Broadband Cymru (ABC) voucher scheme within the intervention area.
  - The potential inclusion of premises within Monmouthshire which had previously been served by AB Internet within the intervention area.
  - Recommendations on the forthcoming procurement process. This included suggesting the on-going monitoring and reporting of premises and postcodes classified as 'under review' as well as highlighting certain business areas, industrial parks, and industries which local authorities believed should be prioritised for the next round of superfast broadband funding.

- Of the 269 responses to the public consultation a total of 248 responses (92%) required no further action by the Welsh Government. This included 214 responses which, upon further investigation by the OMR team, already had the correct NGA classification (white or grey). A total of 19 (7%) responses highlighted issues where premises had been incorrectly classified on the NGA map. Following the public consultation these premises were amended to either white or under review.

## **List of Non-Telecommunication Supplier Responses**

The following Local Authorities provided a response to the public consultation:

**Name:** Conwy County Borough Council  
**Received:** 13<sup>th</sup> July 2017

**Name:** Denbighshire County Council  
**Received:** 13<sup>th</sup> July 2017

**Name:** Michaelston-y-Fedw Community Council  
**Received:** 25<sup>th</sup> July 2017

**Name:** Monmouthshire County Council  
**Received:** 27<sup>th</sup> July 2017

**Name:** Powys County Council  
**Received:** 27<sup>th</sup> July 2017

**Name:** Wrexham County Borough Council  
**Received:** 21<sup>st</sup> July 2017

The following interest groups provided a response to the public consultation:

**Name:** CLA Cymru  
**Received:** 10<sup>th</sup> July 2017

**Name:** Communication Workers Union (CWU) Wales  
**Received:** 13<sup>th</sup> July 2017

**Name:** Growing Mid Wales Partnership  
**Received:** 27<sup>th</sup> July 2017

**Name:** Snowdonia Enterprise Zone Advisory Board  
**Received:** 11<sup>th</sup> July 2017

**Name:** Swansea Bay City Region City Deal  
**Received:** 19<sup>th</sup> July 2017

**Name:** Think Broadband  
**Received:** 18<sup>th</sup> June 2017

## Next Steps

After the public consultation exercise was completed, and the revised and additional broadband data provided by telecommunication suppliers had been evaluated and included into the NGA mapping, this produced an intervention area which consisted of 95,242 white premises (equating to 15,830 postcodes). This list is therefore defined as the '2017 NGA Intervention Area White Premises' list.

A further 61,466 were identified as under review premises (equating to 8,793 postcodes) which will be subject to continued monitoring and may subsequently be mapped as white and form part of the intervention area.

The Welsh Government intends to submit the final proposal for the intervention area along with the '2017 NGA Intervention Area White Premises' list, to BDUK's National Competence Centre for clearance against the State Aid Framework as well as seeking approval of the procurement documentation.

The Welsh Government then proposes to conduct a further procurement in respect of the remaining premises across Wales without NGA broadband infrastructure within the defined intervention area.

The revised intervention area maps showing the details of the agreed '2017 NGA White Premises' across Wales have been published on the Welsh Government website within the 'NGA OMR – Post OMR 'White' Premises' to allow prospective bidders to target those premises efficiently.

<http://lle.gov.wales/map/ngaomr2017>

The Welsh Government would like to thank all those who responded to the public consultation.