



## Welsh Government Consultation Document

### Public Review 2022 - Broadband

### Closure Notice

Date of issue: November 2022

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.  
This document is also available in Welsh.

**Overview**

The purpose of this Public Review Closure Notice is to present the key finding from the Welsh Government's Open Market Review (OMR) and Public Review regarding Next Generation Access (NGA) and Gigabit broadband.

The primary reason for conducting both the OMR and Public Review was to allow the Welsh Government to update its existing NGA intervention area which was procured under the BDUK 2016 National Broadband Scheme (NBS). In addition, the Welsh Government is also looking to gather information regarding gigabit connectivity in order to inform the UK Government's Project Gigabit programme and potential future Welsh Government and Building Digital UK (BDUK) interventions under this programme.

**Further information and related documents**

**Large print, Braille and alternative language versions of this document are available on request.**

**Contact details**

Should you have any queries on the information contained within this document then please email: [BandEang.Broadband2021@gov.wales](mailto:BandEang.Broadband2021@gov.wales)

**This document is also available in Welsh**

<https://llyw.cymru/band-eang-adolygiad-cyhoeddus-2022>

## General Data Protection Regulation (GDPR)

The Welsh Government will be data controller for any personal data you provide as part of your response to the consultation. Welsh Ministers have statutory powers they will rely on to process this personal data which will enable them to make informed decisions about how they exercise their public functions. Any response you send us will be seen in full by Welsh Government staff dealing with the issues which this consultation is about or planning future consultations. Where the Welsh Government undertakes further analysis of consultation responses then this work may be commissioned to be carried out by an accredited third party (e.g. a research organisation or a consultancy company). Any such work will only be undertaken under contract. Welsh Government's standard terms and conditions for such contracts set out strict requirements for the processing and safekeeping of personal data.

In order to show that the consultation was carried out properly, the Welsh Government intends to publish a summary of the responses to this document. We may also publish responses in full. Normally, the name and address (or part of the address) of the person or organisation who sent the response are published with the response. If you do not want your name or address published, please tell us this in writing when you send your response. We will then redact them before publishing.

You should also be aware of our responsibilities under Freedom of Information legislation

If your details are published as part of the consultation response then these published reports will be retained indefinitely. Any of your data held otherwise by Welsh Government will be kept for no more than three years.

## Your rights

Under the data protection legislation, you have the right:

- to be informed of the personal data held about you and to access it
- to require us to rectify inaccuracies in that data
- to (in certain circumstances) object to or restrict processing
- for (in certain circumstances) your data to be 'erased'
- to (in certain circumstances) data portability
- to lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection.

For further details about the information the Welsh Government holds and its use, or if you want to exercise your rights under the GDPR, please see contact details below:

Data Protection Officer:  
Welsh Government  
Cathays Park  
CARDIFF  
CF10 3NQ

e-mail:

[DataProtectionOfficer@gov.wales](mailto:DataProtectionOfficer@gov.wales)

The contact details for the Information Commissioner's Office are:

Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF

Tel: 01625 545 745 or  
0303 123 1113

Website: <https://ico.org.uk/>

# Index

|  |                                     |
|--|-------------------------------------|
| 1. Introduction  | 1                                   |
| 2. Outof the proceeding Open Market Review                 | 2                                   |
| 3. Outcome of the Public Review                            | 3                                   |
| 3.1. Background  | 3                                   |
| 3.2. BDUK Classifications & methodology for this PR        | 3                                   |
| 3.3. Summary of PR findings - premises eligibility         | 4                                   |
| 3.4. Forthcoming procurement                               | 6                                   |
| 3.5. Timescales  | <b>Error! Bookmark not defined.</b> |
| 4. Conclusion  | 6                                   |
| 5. Annex A – Map indicating locations of eligible premises | 7                                   |

# Welsh Government Public Review Closure Notice

## 1. Introduction

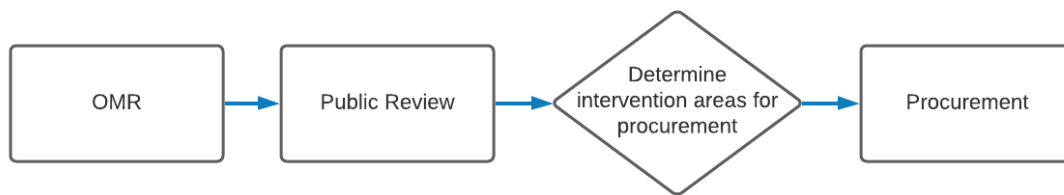
The Welsh Government is progressing with its rollout of Fibre-to-the-Premises (FTTP) gigabit-capable connectivity to an intervention area across Wales consisting of circa 39,000 premises in Lot 1 (North Wales), Lot 2 (East Wales) and Lot 3 (South West and the Valleys) using £56m of public subsidy from the Welsh Government, European Union funding and with some additional funding from the UK Government. This is due to be completed by March 2023.

The current intervention area was originally informed by an OMR conducted in 2017 plus a subsequent re-fresh exercise conducted in 2019 and was procured under the BDUK 2016 National Broadband Scheme (NBS). The three-year validity period for the previously held OMR data has now lapsed and therefore the Welsh Government conducted the 2021 OMR and Public Review to establish whether the data provided previously by telecommunication suppliers in 2017 and 2019 has materially changed. This will enable the Welsh Government to understand if any adjustments are required to the existing NGA intervention area and premises being targeted within it.

In addition to supporting the above intervention area update, the Welsh Government is also supporting the UK Government's ambition to deliver nationwide gigabit-capable broadband as soon as possible. The UK Government has committed £5bn for the hardest to reach parts of the country, ensuring that all areas of the UK can benefit. This will be spent through a package of coordinated and mutually supportive interventions, collectively known as Project Gigabit. Therefore, to achieve this, the Welsh Government and Building Digital UK (BDUK) intend to procure further coverage in the future to target Gigabit 'White' areas across Wales.

The Welsh Government wish to work collaboratively with industry to maximise efficiency, minimise market distortion and help achieve the UK's gigabit objectives within a tight time frame. To do this, we first identified the areas that were not commercially viable through the Open Market Review (OMR) and Public Review (PR) stages. This allowed us to understand from suppliers if there were any current or planned investment over the next three years in broadband infrastructure (Next Generation Access broadband, ultrafast and gigabit-capable) across Wales.

The flowchart below shows the order of stages, from OMR to procurement.



Through these stages, the Welsh Government classifies premises as eligible/ineligible for subsidy on the basis of their existing or planned qualifying broadband infrastructure. Further details on the classification system of White, Grey, Black and Under Review and methodology can be found below in Section 3.2 of this Closure Notice.

Premises categorised as White by the Welsh Government during the OMR and PR process (i.e. eligible for subsidy) are grouped into Intervention Areas (IAs). IAs list those premises that will be targeted for subsidy in any potential future Project Gigabit procurement to follow this PR.

To be clear, not all eligible premises may end up being targeted for subsidy by the Welsh Government and this will be further refined once the Pre-Procurement Market Engagement (PPME) has taken place in October. The finalised IA will then be issued to the market at the Invitation to Tender (ITT) stage of procurement so that suppliers can bid for subsidy to support delivery to this IA.

For further information on how the Welsh Government has assessed supplier plans in response to the OMR/PR process, please refer to the published [Subsidy Control Classification guidance](#) published on BDUK's website.

## 2. Out of the proceeding Open Market Review

Preceding the current PR stage, the Welsh Government conducted an OMR for Wales from the 24<sup>th</sup> August 2021 to the 8th October 2021. This OMR requested information from suppliers regarding current and planned broadband infrastructure within the next three years.

All meaningful responses to the OMR were considered and where necessary used to determine eligible premises. Suppliers who responded to the OMR were informed of the classifications applied to their existing and planned infrastructure relevant to their coverage claims.

## 3. Outcome of the Public Review

### 3.1. Background

The PR for Wales ran from the 8<sup>th</sup> April 2022 to the 6<sup>th</sup> May 2022. During the PR, the Welsh Government invited stakeholders (including broadband infrastructure operators, internet service providers, the public, and businesses) to provide feedback regarding which areas were made up of eligible premises.

The PR stage aimed to validate the outcome of the preceding OMR to ensure that it correctly represented the information provided by suppliers over the course of the OMR.

Suppliers who missed contributing to the preceding OMR, had no definitive plans and/or evidence base on which to substantiate their coverage claims at that earlier stage, or had subsequently updated their plans had a final opportunity to notify the Welsh Government before final determinations were made on premises eligibility. All meaningful responses were carefully considered and where necessary utilised to determine eligible premises. The Welsh Government also sought feedback from all Local Authorities within Wales.

The final outcome of the Wales PR is shown within the following NGA and Gigabit interactive maps which can be found at the following links below:

<https://datamap.gov.wales/maps/public-review-2022-next-generation-access-broadband/>

<https://datamap.gov.wales/maps/public-review-2022-gigabit-capable-broadband/>

In addition, the finalised postcode-level maps showing eligible NGA and Gigabit premises is also provided in Annex A of this Public Review Closure Notice.

A finalised list of NGA and Gigabit postcodes showing White, Grey, Black and Under Review following the PR outcome has also been published and is available on the Welsh Government's website <https://gov.wales/broadband-public-review-2022>. A list of eligible (White / Under Review) premises is also available to suppliers upon request.

### 3.2. BDUK Classifications & methodology for this PR

During the PR, the Welsh Government categorised premises based on their Subsidy Control classifications of either NGA or Gigabit White, Grey, Black or Under Review.

Subsidy control classifications are set out below:

- White - indicates premises with no NGA (capable of delivering at least 30Mbps) or gigabit network infrastructure (capable of delivery at least 1,000Mbps) and none is likely to be developed within 3 years<sup>1</sup>
- Grey - indicates premises where a single qualifying NGA (capable of delivering at least 30Mbps) or gigabit infrastructure (capable of delivery at least 1,000Mbps) from a single supplier is available, or is to be deployed within the coming 3 years<sup>1</sup>
- Black - indicates premises with two or more qualifying NGA (capable of delivering at least 30Mbps) or gigabit infrastructures (capable of delivery at least 1,000Mbps) from different suppliers being available, or will be deployed within the coming 3 years<sup>1</sup>
- Under Review - indicates premises where suppliers have reported current or planned commercial broadband coverage, but where claimed current NGA or gigabit coverage has not been verified, or, in respect of planned build, where evaluators are confident that NGA or gigabit infrastructure will be delivered, but some risks to delivery remain, or there are some gaps in evidence

The Welsh Government and BDUK will only provide subsidy to target premises for Project Gigabit procurements that have been designated as Gigabit White. Premises which have been designated as Under Review may be included within the Deferred Scope of any future Project Gigabit procurement. Where this is the case, a further review will be undertaken to confirm whether they are Gigabit Grey or Gigabit White before they are released for build.

In accordance with the OMR/PR processes, supplier data submitted during the OMR and PR has been mapped using a methodology that protects commercially sensitive supplier data. To reflect this sensitivity, we will only release White and Under Review UPRNs.

### 3.3. Summary of PR findings - premises eligibility

The outcome of the Wales OMR is shown within the following NGA and Gigabit interactive maps which can be found at the following links below:

<https://datamap.gov.wales/maps/public-review-2022-next-generation-access-broadband/>

<https://datamap.gov.wales/maps/public-review-2022-gigabit-capable-broadband/>

The interactive maps can be displayed to show either NGA or Gigabit White (shown as red on the interactive map) or non-white premises or postcodes.

---

<sup>1</sup> There may be occasions where credible plans extend beyond a 3-year period, in that case, these may be taken into account.

Where postcode level data has been used for the purpose of mapping only, they have been classified as follows:

- A postcode is White if any White premises are present.
- A postcode is Under Review if any Under Review premises are present.
- A postcode is Black if all premises in the postcode are classified Black.
- A postcode is Grey if all premises are Grey or there is a mixture of Grey and Black.

For presentational purposes only, an NGA and Gigabit postcode-level map summarising these premise classifications is provided in Annex A. NB. The Welsh Government and BDUK will only subsidise build to premises which have been designated as White – postcodes are not used to determine IAs for subsidy.

The outcome of the PR is summarised in terms of NGA and Gigabit White, Grey, Black and Under Review postcodes and premises as outlined in the tables below:

| Postcode Classification | Number of Postcodes | Number of Gigabit Black Premises | Number of Gigabit Grey Premises | Number of Gigabit Under Review Premises | Number of Gigabit White Premises |
|-------------------------|---------------------|----------------------------------|---------------------------------|---|----------------------------------|
| White                   | 25,673              | 16,917                           | 83,012                          | 124,041                                 | 231,482                          |
| Under Review            | 38,041              | 16,682                           | 153,671                         | 523,847                                 |                                  |
| Grey                    | 23,980              | 46,144                           | 408,050                         |   |                                  |
| Black                   | 2,335               | 49,662                           |                                 |   |                                  |
| <b>Total</b>            | <b>90,029</b>       | <b>129,405</b>                   | <b>644,733</b>                  | <b>647,888</b>                          | <b>231,482</b>                   |

| Postcode Classification | Number of Postcodes | Number of NGA Black Premises | Number of NGA Grey Premises | Number of NGA Under Review Premises | Number of NGA White Premises |
|-------------------------|---------------------|------------------------------|-----------------------------|-------------------------------------|------------------------------|
| White                   | 13,702              | 23,851                       | 116,070                     | 28,435                              | 84,174                       |
| Under Review            | 15,225              | 24,421                       | 157,634                     | 93,018                              |                              |
| Grey                    | 47,922              | 152,938                      | 699,510                     |                                     |                              |
| Black                   | 13,180              | 273,457                      |                             |                                     |                              |
| <b>Total</b>            | <b>90,029</b>       | <b>474,667</b>               | <b>973,214</b>              | <b>121,453</b>                      | <b>84,174</b>                |

### 3.4. Forthcoming procurement

Details of any future Project Gigabit procurement by the Welsh Government will follow once Pre-Procurement Market Engagement (PPME) has taken place with suppliers. This is currently scheduled for October 2022. It is intended that once PPME has been completed the target IA(s) for any future Project Gigabit procurements in Wales will be finalised by the Welsh Government and this will be released as part of the ITTs for Wales.

## 4. Conclusion

A key output from the Wales OMR/PR is shown in the NGA and Gigabit interactive maps which show premises that are eligible for subsidy, and which can be found at the following links below:

<https://datamap.gov.wales/maps/public-review-2022-next-generation-access-broadband/>

<https://datamap.gov.wales/maps/public-review-2022-gigabit-capable-broadband/>

[Annex A](#) also sets this out at a postcode level

From this map, the Welsh Government plans to develop potential IA(s) to be proposed to the market during the PPME phase due to start in October.

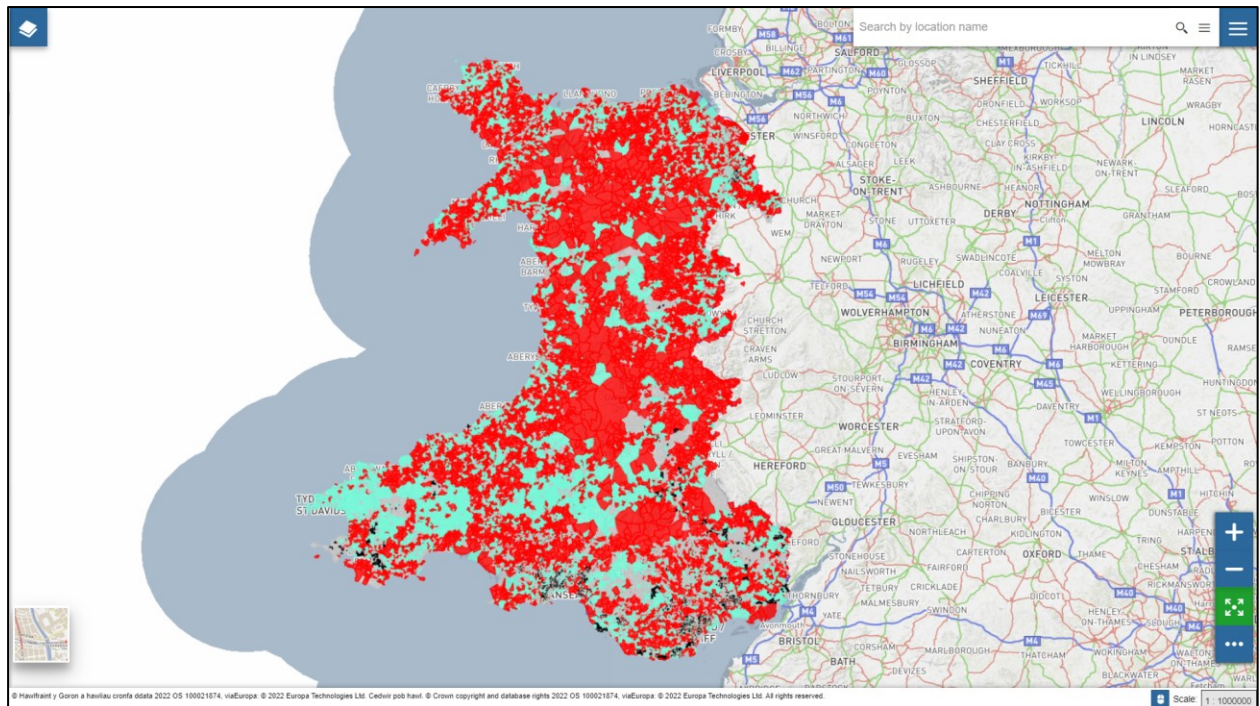
A full list of NGA and Gigabit White and Under Review UPRNs is available on request to suppliers via [BandEang.Broadband2021@gov.wales](mailto:BandEang.Broadband2021@gov.wales)

## 5. Annex A – Map indicating locations of eligible premises

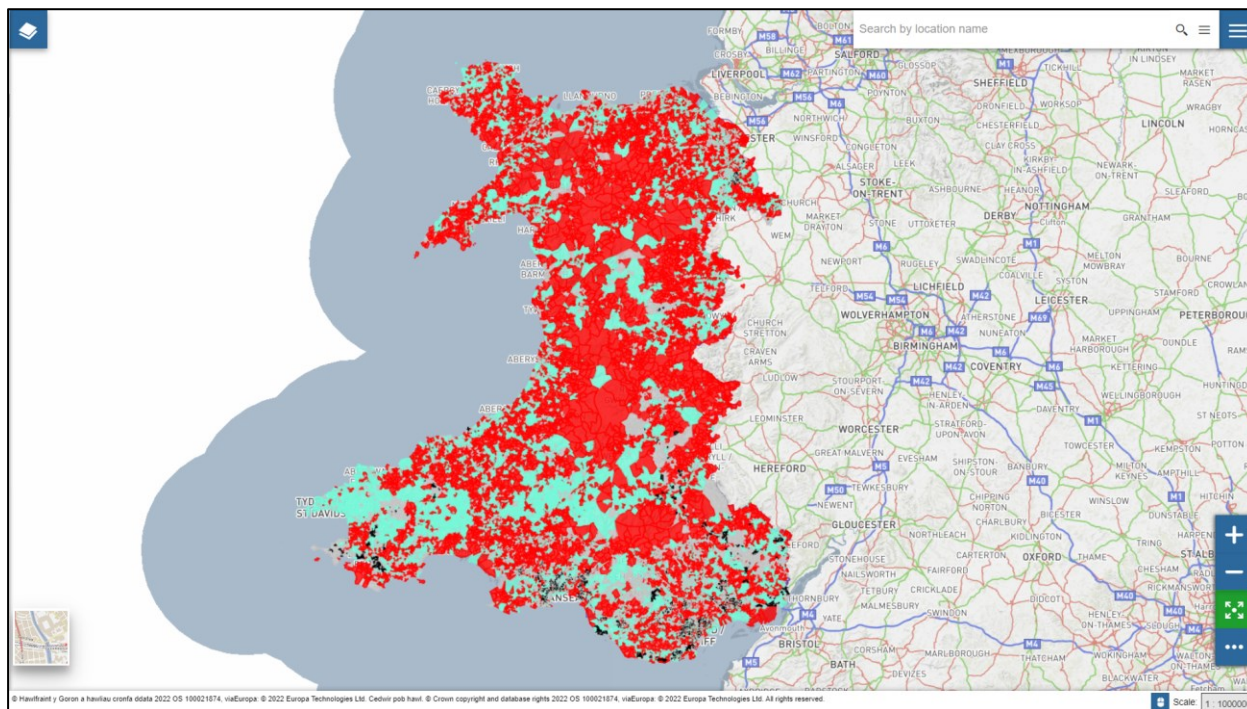
The below NGA and Gigabit postcode level maps indicates areas where those premises eligible for subsidy are located i.e. white areas (which are Red on the map). These eligible premises may be included within future IA (s).

Black, Grey and Under Review (shown as Blue on the map) areas indicate where those premises ineligible for Subsidy are located.

### NGA Postcode Level Map



## Gigabit Postcode Level Map



Please note that the detailed interactive maps providing more detail can be found here:

<https://datamap.gov.wales/maps/public-review-2022-next-generation-access-broadband/>

<https://datamap.gov.wales/maps/public-review-2022-gigabit-capable-broadband/>