



Llywodraeth Cymru
Welsh Government

CLOSED CONSULTATION

Broadband open market review 2021: summary of responses

Summary of responses for the Broadband: open market review 2021.

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Summary

The Welsh Government Open Market Review (OMR) was undertaken from 24 August until the 8 October 2021.

The objective of the OMR was to understand where private sector investment in either next generation access (30Mbps+) and/or gigabit networks (1,000Mbps+) has already occurred, is currently being built, or is planned to be deployment across Wales within the next three years. The primary reason for carrying out the 2021 OMR is to allow the Welsh Government to update its existing 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.

An OMR Request for Information (RFI) was therefore issued by the Welsh Government, which enabled telecommunication companies and broadband providers to respond with detailed information on their broadband infrastructure such as their technical network designs, premises-level coverage claims (either existing or planned) and their future broadband rollout plans across Wales over the next 3 years.

The data received from telecommunication suppliers was then analysed by the Welsh Government in order to classify premises within Wales as either NGA or Gigabit Black / Grey/ White or Under Review according to their broadband coverage status. The results of this broadband data analysis will be published in April 2022 by the Welsh Government as part of the Public Review Request for Information (RFI). During the Public Review stage all stakeholders including members of the public, businesses, Local Authorities as well as suppliers will be invited to comment on the classification and mapping of premises produced by

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the 2021 OMR and validate the findings. Following the Public Review, the Welsh Government will then publish its final proposal for eligible NGA and gigabit 'White' areas.

However, prior to the Public Review RFI being launched this 'Summary of Responses' document aims to provide a high-level view of the supplier responses received during the 2021 OMR and outline the subsequent next steps in the process.

Background

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.

The current intervention area was originally informed by an Open Market Review (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 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 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

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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.

Consultation details

Duration

The OMR was open between the 24 August 2021 to the 24 September 2021. To ensure the market engagement was as wide as possible the OMR RFI was issued to over 400 telecommunication suppliers including those known to have broadband infrastructure across Wales and others known to have (or thought potentially to have) plans to deploy networks across Wales.

A request was made to the Welsh Government to extend the OMR response period. Based on this request the Welsh Government agreed to extend the deadline for OMR responses by 2 weeks. All telecommunication suppliers were notified via email as well as it being published online of the extension to 8 October 2021.

Following receipt of the OMR responses from suppliers the information was reviewed initially for completeness before a more detailed assessment was undertaken to ensure the information requested within the Annex B: Supporting Evidence Template was consistent with suppliers Annex A: Data Submission coverage claims (either existing and/or planned). The assessments of suppliers' coverage claims and supporting evidence often revealed suppliers OMR responses had significant gaps, which meant the Welsh Government was unable to assess the supplier's broadband coverage claims across Wales.

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Therefore, in these instances email clarification questions were issued to suppliers requesting either an explanation regarding any inconsistencies, further information to support their coverage claims or revised data submissions to correct any anomalies.

The OMR was launched via the Welsh Government website:

Broadband: open market review 2021

Responses

In total the Welsh Government received ten (10) OMR responses from telecommunication suppliers claiming either NGA and /or gigabit coverage within Wales which were evaluated as part of the OMR process, and which are shown below.

It should be noted OMR responses received by the Welsh Government from suppliers are subject to confidentiality clauses and contain detailed information, which is commercially sensitive regarding suppliers' business plans, coverage footprints, technology, future network builds, take-up assumptions and financing information and therefore information regarding their full OMR RFI submissions and any subsequent clarification responses cannot be published in full.

Organisation: Airband

OMR Response: Airband's response to the OMR RFI included both existing NGA and gigabit coverage claims across North and South Wales using both wireless and wired technologies. Their response also included future planned gigabit coverage within Powys via an existing BDUK contract.

Organisation: Broadway Partners

OMR Response: Broadway Partners response to the OMR RFI included both

existing NGA and gigabit coverage claims within Pembrokeshire and Monmouthshire. Their response also included future planned gigabit coverage as part of their aim to cover 250,000 premises across the UK – mostly across rural parts of Wales and Scotland by 2025 and funded by their recently secured £145 million investment.

Organisation: Michaelston-y-Fedw Internet CIC

OMR Response: Michaelston y Fedw Internet Community Interest Company (CIC) provided a response to the OMR RFI. The community scheme within the village of Michaelston y Fedw gave details of their current FTTP connections to premises which are funded through the Welsh Government's voucher schemes and the Local Broadband Fund (LBF). In addition, their response also identified future planned gigabit coverage to be delivered within the next 3 years.

Organisation: Netomnia

OMR Response: Netomnia's response to the OMR RFI included its future planned gigabit coverage across Wales including Bridgend and Barry being supported by their recently secured £123 million investment.

Organisation: Openreach

OMR Response: Openreach's response to the OMR RFI included both existing and planned NGA and gigabit coverage claims across Wales using a variety of technologies including ADSL, FTTC and FTTP.

Organisation: Secure Web Services (SWS)

OMR Response: SWS expressed an interest in future network deployments within Wales however no broadband coverage data was provided.

Organisation: Spectrum Fibre

OMR Response: Spectrum Fibre's response to the OMR RFI included both existing and future planned gigabit coverage across South Wales including Monmouthshire, Pembrokeshire, and the Vale of Glamorgan and as part of their target to pass 150,000 premises by 2025.

Organisation: Telcom Group

OMR Response: Telcom Group's subsidiary WeFibre responded to the OMR RFI with their future planned gigabit coverage claims funded as part of their gigabit voucher broadband rollout plan.

Organisation: Virgin Media

OMR Response: Virgin Media's response to the OMR RFI included both existing and planned coverage claims across Wales using either their existing Hybrid Fibre Coax (HFC) network or FTTP.

Organisation: Voneus

OMR Response: Voneus' response to the OMR RFI included both existing NGA coverage claims across Ceredigion, Pembrokeshire, and Carmarthenshire. Their response also included future planned gigabit coverage across South Wales within the next 3 years.

Additional correspondence

The Welsh Government 2021 OMR received the following additional correspondence from the following telecommunications suppliers:

Organisation: bOnline

Received: 13 September 2021

OMR Response: Confirming that bOline focuses on providing VoIP services and reselling of broadband products from BT wholesale and TalkTalk Business. Company do not own any broadband infrastructure within Wales.

Organisation: CityFibre

Received: 4 October 2021

OMR Response: CityFibre confirmed they have no plans to invest in Wales over the next 3 years

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Organisation: Gigaclear

Received: 22 September 2021

OMR Response: Gigaclear confirmed they have no current or planned gigabit capable coverage within Wales.

Organisation: Redraw Internet

Received: 13 September 2021

OMR Response: Redraw Internet are a wireless ISP. While they stated they did have some small gigabit capable coverage within Flintshire, North Denbighshire, North Wrexham, Newport, Cardiff and the Vale of Glamorgan they were not able to provide coverage data at a premises (UPRN) level for the OMR.

Organisation: TalkTalk

Received: 14 September 2021

OMR Response: TalkTalk confirmed that as a retail provider they do not own any broadband infrastructure within Wales.

OMR evaluation

By using an Address Base Premium (Epoch 85) for Wales as the premises level baseline, the broadband coverage data provided by telecommunications suppliers within their Annex A: Data Submission template along with their written evidence base presented in their Annex B: Supporting Evidence template has been used to generate both premises and postcode level NGA and Gigabit maps using the 'White', 'Grey', 'Black' and Under Review subsidy control classification.

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Next steps

The interactive NGA and gigabit mapping, along with the associated 'White' and Under Review postcode list, will be released by the Welsh Government in April via the Public Review RFI. This consultation will be available on the Welsh Government's Consultation Portal (Link will be provided in an updated version of this document in due course)

The purpose of this Public Review will be to confirm that the NGA and Gigabit 'white' intervention areas produced following the OMR process are accurate.

The Public Review will be open to all stakeholders to comment on including members of the public, businesses, and Local Authorities. Suppliers are also invited to provide comments on the proposed 'White' areas and validate the OMR findings including those suppliers who have previously responded to the 2021 OMR by proving any updates regarding their planned network deployments as well as those suppliers who did not submit coverage data during the OMR process but who have a broadband footprint within Wales (or have plans to deploy a network) and therefore want their coverage claims to be considered.

Following completion of the Public Review the Welsh Government will then publish its final proposal for eligible NGA and gigabit 'White' areas, taking account of the outcome of the Public Review.

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Annex A: glossary of terms

Term	Definition
Asymmetric digital subscriber line (ADSL)	A digital technology that allows the use of a standard telephone line to provide broadband data. Typical first-generation ADSL is capable of providing speeds up to 8Mbps while ADSL2+ is capable of providing up to 24Mbps.
Building Digital UK (BDUK)	Part of the Department for Digital, Culture, Media and Sport, is responsible for UK government public funding to support the delivery of better broadband and mobile connectivity to the UK.
Black	Black areas (or premises) are those where at least two networks of different operators exist or will be deployed in the coming three years.
Fibre to the Cabinet (FTTC)	Fibre optic cables run from the telephone exchange to a nearby street cabinet before using the existing copper telephone wires to connect the remaining distance to each premises.
Fibre to the Premises (FTTP)	This is where optical fibre is run directly to each premises, allowing for a fully future proofed internet connection. Speeds offered over FTTP are typically up to 1 gigabit per second (1,000Mbps).
Gbps	Gigabits per second.
Gigabit Capable	Gigabit download speeds of at least gigabit per second (1,000Mbps) delivered across the network as defined in Annex C of the OMR RFI.
Grey	Grey areas (or premises) are those where only one network is present or is

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Term	Definition
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to be deployed within the coming three years.

Hybrid fibre coaxial (HFC)	A broadband cable network that combines optical fibre and coaxial cable to deliver broadband services. DOCSIS (Data Over Cable Service Interface Specification) is the technology standard used to deliver high speed broadband over HFC networks
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Mbps	Megabits per second.
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Next Generation Access (NGA)	Networks that have the following characteristics: (i) deliver services reliably at a very high speed per subscriber through optical (or equivalent technology) backhaul sufficiently close to user premises to guarantee the actual delivery of the very high speed; (ii) support a variety of advanced digital services including converged all-IP services; and (iii) have substantially higher upload speeds (compared to basic broadband networks). In this context NGA broadband networks must be capable of delivering access line speeds of at least 30Mbps.
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Open Market Review (OMR)	An exercise carried out with the market to determine expected private sector deployment of broadband infrastructure 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 exists.
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Under Review	Areas where suppliers have reported planned broadband coverage, but those plans have been judged through the OMR process as potentially being at risk of not being completed and will therefore be subject to continued monitoring and verification of a supplier build plans during a three year period to ensure significant progress is being made with the network deployment. In the event that a supplier's build plans fall away, any premises classified as 'under review' would be mapped as white and may therefore form part of any future proposed Intervention Area.
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Term	Definition
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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.
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White	White areas (or premises) are those in which there is no qualifying broadband infrastructure, and none is likely to be developed within three years.
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