

# Future Telecoms Infrastructure Review

## United Kingdom

Infrastructure

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### Definitions of Data:

N/A

### Main Focus of Document:

Examines the market and policy conditions that will enable greater investment in future telecoms infrastructure and sets out a national, long-term strategy for digital connectivity

### Target Beneficiaries or Sectors:

citizens, businesses

### Key Elements:

Addresses key questions that could affect the evolution of the United Kingdom's digital infrastructure, including convergence between fixed and mobile technologies, and the transition from copper to full fibre networks. Key components of the review include:

National Full Fibre Connectivity Targeting a sharp increase in the pace of full fibre roll out by promoting competition and commercial investment. This will focus on:

1. Making the cost of deploying fibre networks as low as possible by addressing barriers to deployment, which both increase costs and cause delays;
2. Supporting market entry and expansion by alternative network operators through easy access to Openreach's ducts and poles, complemented by access to other utilities' infrastructure (for example, sewers);
3. Stable and long-term regulation that incentivises competitive network investment;
4. An 'outside in' approach to deployment that means gigabit-capable connectivity across all areas of the UK is achieved at the same time, and no areas are systematically left behind; and
5. A switchover process to increase demand for full fibre services.

Strategic priorities: Addressing deployment barriers and reducing costs Proposes new legislation and non-legislative approaches to address barriers in the following areas:

- Simplifying wayleave agreements to facilitate easier access to multi-dwelling units
- Reducing the costs and time caused by street works by standardising the approach across the country
- Ensuring fibre connectivity in new builds, so residents of new homes have full fibre technology

Easy access to passive infrastructure in telecoms and other utilities, to support market entry

- Duct and Pole Access (DPA)
- DPA can also be complemented by access to passive infrastructure owned by other utilities, where appropriate

Stable and long-term regulation that encourages competitive network investment The Government has identified a set of outcomes with a view to achieving this strategic priority:

- Greater regulatory stability and clarity
- Recognising the convergence of business and consumer uses of networks
- Regulation only where and to the extent necessary
- Recognition of the differences in local market conditions across the UK
- Flexibility for firms to develop new approaches to reduce deployment costs and manage risks through commercial arrangements

Full fibre connectivity for all through an 'outside in' approach to deployment

- While network competition serves the commercially feasible areas, the government will support investment in the most difficult to reach areas at the same time
- The government will prioritise delivery of full fibre networks through the existing BDUK Superfast Programme
- The government will use competitive tenders to award contracts for these areas to commercial operators, in order to minimise any public subsidy requirements and ensure fairly priced services

Switching to a full fibre future The Government will set up a mechanism with Ofcom and industry for planning the switchover process to new fibre networks and retiring the legacy copper network. Switchover should meet a number of policy conditions:

- Plans support a timely switchover;
- Efficient, so that switchover is smooth with minimal consumer disruption;
- Transparent, so that customers have the information they need to make informed choices and clearly signalled via notice periods so operators have certainty;
- Consistent, with existing regulatory and consumer obligations;
- Pro-competitive, so processes are in place to support easy switching between networks;
- A fair deal for consumers, including adequate safeguards for vulnerable customers.

Legal separation of BT and Openreach Important steps have been taken by BT Group and Openreach to implement legal separation, including: setting up the Openreach Board, responsible for setting Openreach's strategy and overseeing its performance; and proper industry engagement on technology investment choices.

A World Leader in 5G The Review identifies four priority areas:

- Make it easier and cheaper to deploy mobile infrastructure and support market expansion, including the implementation of the wide-ranging Electronic Communications Code (ECC) on-site access and consideration of further planning reforms;
- Support the growth of infrastructure models that promote competition and investment in network densification and extension;
- Fund beneficial use cases through the Government's £200 million 5G Testbeds and Trials Programme that helps de-risk business models for 5G; and
- Promote new, innovative 5G services from existing and new players, through the release of additional spectrum.

Convergence between Full Fibre and 5G The policy and regulatory framework should be sufficiently flexible and forward-looking to reflect the growing convergence between fixed and mobile networks and services. This could be achieved through:

- Removing practical obstacles or barriers to converged networks given the benefits;
- Considering access network requirements holistically, where appropriate, through unified market reviews; and
- Allowing operators to benefit from unrestricted usage of Openreach's passive infrastructure for the provision of mobile backhaul services.

Competition Digital infrastructure Electronic communication Mobile Spectrum

**Policy/regulation mirrored:**

**Countries:**