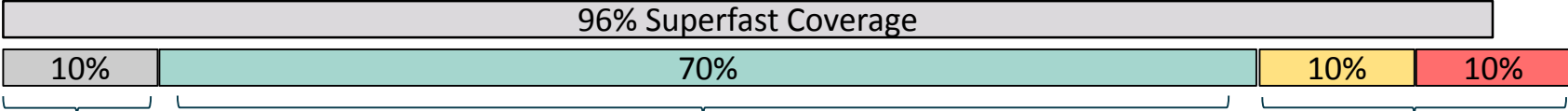


Achieving Full Fibre Coverage

November 2019

Building the UK's fibre network

Industry & Political Background



Estimated UK Full Fibre coverage today

Commercial Investment from Industry

- c.9m premises committed publicly
- c.30m premises in stated ambitions
- Critically overlap will exist in the most competitive areas

FTIR

- 30% of the UK – 3 or more providers
- A further 50% of the UK – 2 or more providers

Public Funding Intervention

- Universal Service Obligation
 - Industry Rural Plans
 - LFFN/RGC/Outside In
- FTIR**
- 10% requiring market stimulation
 - 10% requiring funding introduction

FTIR
Full Fibre by 2033
15m by 2025

'Outside In'
5m homes by 2030

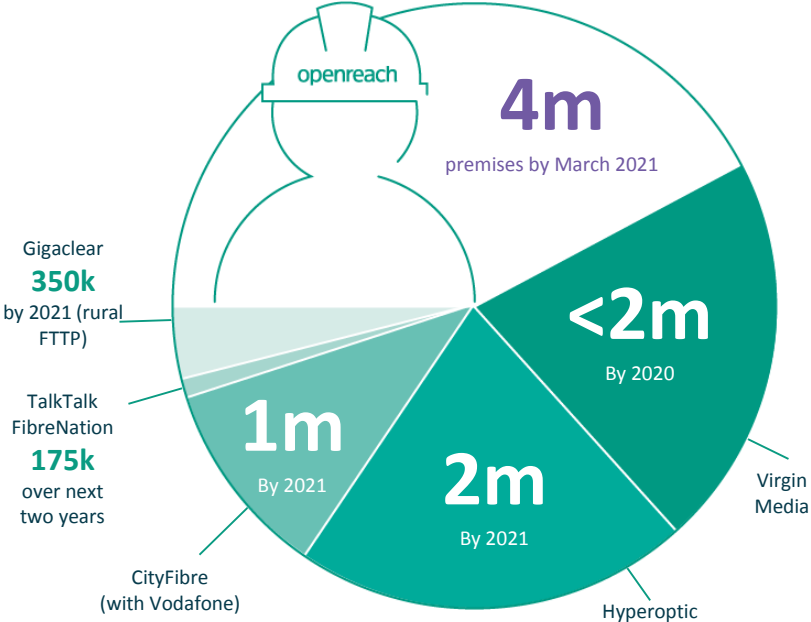
Gigabit capable
infrastructure to all
by 2025

British Broadband
Free Fibre Broadband
for all by 2030

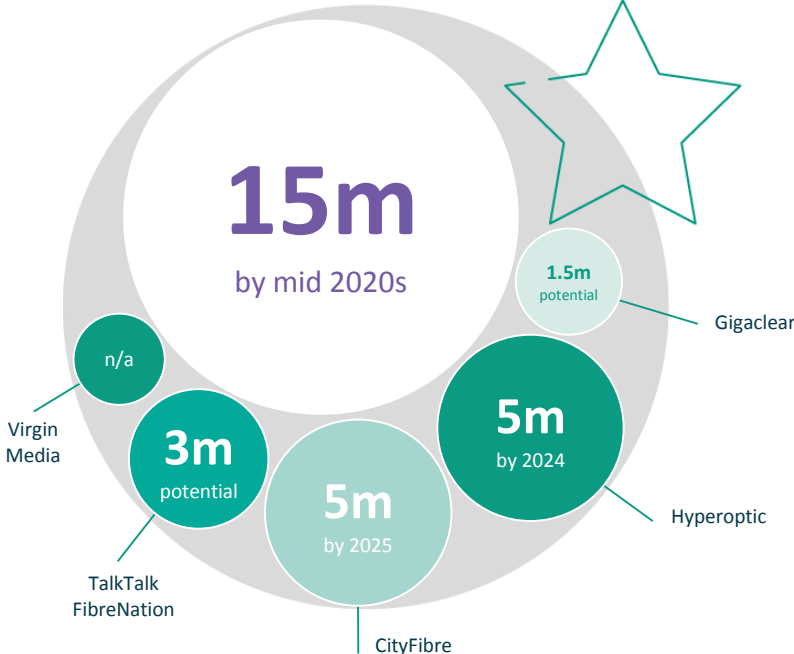
Building the UK's fibre network

Industry Announcements/Response

Stated target



Stated ambition



Building the UKs fibre Network

Policy Enablers and Barrier Busting

1 Barrier busting

Wayleave reform – particularly MDU’s

Full fibre mandated in new builds

Flexibility from local government regarding traffic management, noticing and permits.

2 Business rates

100% Business rates exemption for new full fibre.

Longer term reform of the system.

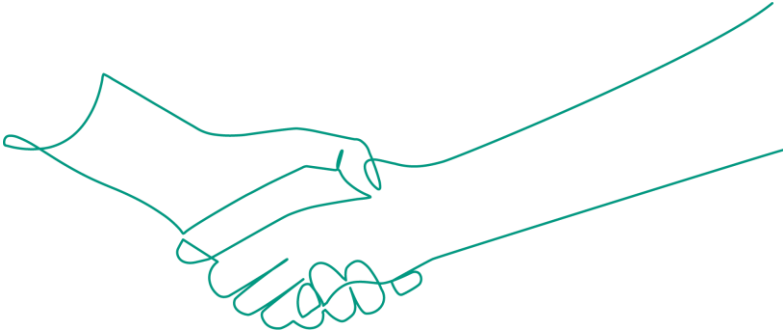
3 Post-Brexit Labour Supply

Impact of future immigration policy on availability of labour.

4 Outside In/Public Funding Intervention

Ensure funding targeted in the areas of market failure and not industry will naturally build

Creation of an Industry and government agreed framework that supports the rapid and economic deployment of full fibre networks and encourages full coverage within geographic areas



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