

Tuesday 21 May 2025
Chair, Helen Morgan MP
1 Parliament Street

The Shared Rural Network (SRN) programme is a joint venture between the four major UK mobile operators (EE, O2, Vodafone, and Three UK). The programme has already achieved its 88% per-operator geographic coverage target and 95% overall UK landmass coverage—15 months ahead of the December 2025 deadline. As of April 2025, 96% of the UK's geography now has 4G coverage from at least one operator. Work is ongoing to upgrade emergency services sites to allow commercial 4G access.

Witnesses believed that the programme has incentivised operators to invest in areas already served by competitors and is exploring ways to prioritise value for money in the use of public funds. Challenges remain in the most remote areas, particularly in Scotland, where opposition to built infrastructure makes deployment difficult.

It was discussed how the implementation of the PSTI Act has led to a decrease in mobile site rental rates, with the Electronic Communications Code (ECC) helping to stabilise the legal framework for operators. However, around 6,200 sites remain under the legacy framework, creating uncertainty. The mobile network industry is calling for the full implementation of the PSTI Act and increased investment in planning services to address challenges, particularly in rural areas, and to ensure the successful rollout of 5G.

The session explored the sunsetting of mobile networks. The 2G network switch-off is largely complete, with remaining 3G networks to be shut down in phases. The industry is learning from the 3G switch-off to manage the 2G switch-off more effectively, particularly with regard to unique use cases such as car tracking. Lessons are also being drawn from the public switched telephone network (PSTN) migration. While 5G is important for high-capacity data needs, 4G will remain sufficient in many areas, particularly those with low population density. Overall, coverage has increased, yet capacity issues persist, especially in areas that have historically enjoyed good connectivity.

The increasing demand for mobile data, driven by both a rise in subscribers and a surge in usage, poses challenges for mobile operators. While 5G promises energy efficiency and improved spectrum utilisation, the main obstacle is obtaining planning permission for new sites. Witnesses believed that local areas often prioritise community aesthetics over connectivity, resulting in lengthy planning processes and high costs for operators.

It was discussed how the planning system does not currently reflect the enthusiasm for improved mobile connectivity in rural areas. Severe staff shortages, combined with poor public understanding and high objection rates to new infrastructure, are key issues. It was also noted that there is a lack of trained planners and declining interest in the profession. Industry representatives are calling for investment in digital planning champions and support through the 10-year infrastructure strategy and the upcoming spending review.

The proposed merger between Three UK and Vodafone aims to create a more competitive market, with plans to invest £1 billion in a standalone 5G network to cover 99% of the population within 10 years.

The 2023 Act, aimed at implementing digital infrastructure, has faced delays due to changes in government. While devolution and local government reorganisation offer opportunities for more tailored plans, concerns remain about potential regional disparities in funding and implementation.

Witnesses broadly supported the Government's recently published Digital Inclusion Action Plan but emphasised the need for a balanced approach, including a longer-term strategy backed by additional government investment.