Tuesday 10 June 2025
Chair, Helen Morgan MP
Portcullis House, Westminster

The session focused on challenges and opportunities in improving digital connectivity across rural and coastal areas, with particular emphasis on planning, infrastructure deployment, and regulatory frameworks.

Mobile Coverage and Network Investment
Despite Ofcom's public commitment to improve coverage reporting, witnesses stressed a persistent mismatch between official figures and real-world experiences in rural and coastal communities. Constituents often report unreliable or non-existent mobile signal in areas marked as "covered," creating ongoing challenges for residents, local businesses, and public services.

Witnesses broadly welcomed the £11 billion investment associated with the Vodafone and Three UK merger, which aims to upgrade existing infrastructure and improve 5G coverage and capacity. The goal is to enhance the use of current sites rather than consolidate them, with a focus on delivering more consistent service in underserved regions.

Planning System Barriers
Planning permission remains a major barrier to digital infrastructure deployment. Witnesses cited numerous examples where applications to upgrade or install masts were rejected, even in areas with evident need, such as where emergency services had logged repeated incidents due to poor connectivity. National Parks, Areas of Outstanding Natural Beauty (AONBs), and other protected landscapes were identified as particularly difficult.

Issues cited include:
- Overly cautious or under-resourced local planning departments.
- Refusals without engagement or pre-application discussion.
- Lack of understanding among planners of the technical and social value of digital infrastructure.

Fibre and Fixed Wireless Rollout
AltNets (Alternative Networks) are delivering fibre and fixed wireless solutions, especially in rural regions.

While code powers often streamline fibre rollout, planning hurdles persist for radio equipment installations. Infrastructure reuse, such as Openreach's ducts and poles (PIA), has facilitated deployment, but using other existing assets like National Grid joint-user poles remains complex and slow.

Shared Rural Network (SRN) and National Roaming
The SRN has made headway in improving 4G coverage, especially by leveraging mast sharing with emergency service infrastructure. However, witnesses highlighted that in mountainous regions (e.g. Snowdonia), the SRN is less effective due to site misalignment between operators.

Many called for national roaming in remote areas—allowing users to connect to any available network regardless of provider—similar to emergency calling rules. This proposal was viewed as a practical solution in high-tourism or hard-to-serve areas, where commercial incentives for coverage remain weak.

Neutral host models, where infrastructure is shared across operators by default, were also discussed as a long-term solution to geographic inequality in mobile service.

Digital Inclusion and Economic Implications
Referenced research from Pragmatix (on behalf of the Rural Coalition) revealed that rural productivity in England lags behind Scandinavian countries due in part to poor digital access. If the UK had matched this performance, an additional £19 billion in tax revenue could have been generated in 2021.

While Project Gigabit and other initiatives are accelerating rollout, the UK is still playing catch-up to countries like Norway, which boasts over 80% rural full-fibre coverage compared to less than 50% in parts of Shropshire and the Lake District.

Witnesses stressed the need for:

- Continued investment in rural digital infrastructure.
- Targeted support for harder-to-reach communities.
- Integrating digital priorities into wider economic development strategies.

Gigabit Voucher Scheme and Project Gigabit
The Gigabit Voucher Scheme was described as burdensome for small communities, requiring a local champion to coordinate uptake and absorb financial risk. The process is complex, slow, and often inaccessible to less digitally literate or elderly populations.

In contrast, Project Gigabit contracts, which pay providers per premises passed, were seen as more scalable and less reliant on individual community mobilisation. However, “passed” premises can still remain unconnected due to driveways, blockages, or refusal to install poles—raising equity concerns.

Public Awareness and Technology Transitions
Witnesses agreed that awareness of network changes—including the 3G and 2G switch-offs and the Public Switched Telephone Network (PSTN) migration—remains low among consumers and businesses.

Current awareness campaigns were described as limited and reactive, with most individuals only realising changes once service was disrupted. Vulnerable users, such as the elderly or those dependent on health services, are particularly at risk.

Electronic Communications Code (ECC) and Land Access
The ECC has helped mobile operators secure rights to upgrade infrastructure, but many sites remain under the legacy regime. Approximately 6,000 sites are blocked from upgrades due to stalled negotiations or landowner disputes.

Key concerns included:

- Reduced rental payments under the ECC discouraging landowners from renewing agreements.
- Perceived imbalance between operator powers and landowner rights.
- Conflicts arising from changes in site ownership models (e.g. mobile network operators vs tower companies vs investment funds).

While some stakeholders argued for further implementation of the Product Security and Telecommunications Infrastructure (PSTI) Act, others warned that legal and commercial conflicts could worsen without better balance.