Reconnecting Britain:
Restoring Trust, Connecting Communities and Driving Inclusive Growth

A Digital Communities All-Party Parliamentary Group (APPG) Report

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Executive Summary

Digital connectivity is the backbone of the UK's economic growth, social inclusion, and delivery of modern public services. Yet, persistent gaps in both mobile and broadband coverage, especially in rural and hard-to-reach communities, threaten to undermine national ambitions. This report calls for urgent, coordinated action to address these challenges and unlock the full potential of digital infrastructure.

Connectivity as a Driver of National Economic Growth
Universal access to reliable, high-speed digital services is fundamental to the UK's economic renewal. Improved connectivity can boost productivity, stimulate reinvestment in local economies and expand the nation's talent pool. It is also critical for enabling new technologies, supporting modern public services, and ensuring the UK remains globally competitive. The report highlights that delays in digital infrastructure rollout could cost the country tens of billions in lost economic output, while successful adoption of 5G and full fibre could deliver productivity gains worth over £200 billion by 2035. Closing the digital divide is therefore not just a social imperative, but an economic necessity.

The Need for Greater Scrutiny by Ofcom
While Ofcom's regulatory oversight has supported progress in expanding digital infrastructure, significant concerns remain about the accuracy of coverage data. The current system relies heavily on operator-supplied modelling, which often fails to reflect the lived experiences of residents and businesses in urban, rural and coastal communities alike. This disconnect has led to policy decisions and investment strategies that do not always align with actual need. The report urges Ofcom to adopt a more robust, independent approach to data collection and to embed greater scrutiny and accountability in its regulatory processes. Enhanced accuracy is essential to ensure that government targets are meaningful and that operators are held to account for real-world outcomes.

Promote Competition in Mobile and Broadband Sectors
The UK's digital infrastructure landscape remains dominated by a handful of major operators, limiting competition and slowing progress. The report identifies structural barriers-including market concentration, inefficient planning processes, and legacy legal frameworks-that hinder new entrants and stifle innovation. It calls for regulatory reform to promote infrastructure sharing, encourage alternative network providers (altnets), and create a more level playing field. Breaking down monopolies will require a unified regulatory framework, targeted investment, and proactive government intervention to ensure that all regions benefit from next-generation connectivity.

Conclusion
To achieve the UK's digital ambitions, the APPG recommends the Government to commission an urgent, independent review of the UK's digital connectivity landscape. The APPG also argues for stronger regulatory scrutiny by Ofcom, more strategic investment in connectivity as a driver of economic growth, and decisive action to foster competition and innovation across the sector.

Only through sustained, coordinated effort can the UK close its digital divide and realise the full economic, social, and environmental benefits of world-class digital infrastructure.

Key recommendations

National Government

- The Government should urgently commission an independent review of the UK's digital connectivity landscape.
- The Department for Science, Innovation and Technology should implement the remaining provisions of the Product Security and Telecommunications Infrastructure (PSTI) Act. As part of this process, the department should encourage all stakeholders to adhere to Ofcom's Code of Practice on the Electronic Communications Code (ECC), fostering collaboration and compromise to ensure the continued improvement and reliability of vital communications services for everyone.
- At the next fiscal event, the Government should announce the availability of ringfenced funding that enables combined authorities/strategic authorities to improve capacity and capability of dedicated digital teams to coordinate and deliver digital transformation and adoption.
- The Government should launch a project that supports local areas to come forward and identify not-spots and unlock funding to improve connectivity in these areas.
- Introduce business rates relief for mobile infrastructure in hard-to-reach areas.
- Support innovation in mapping connectivity and use this data to support policy development and direction, including in any targets set to track performance.

Local Government

- Local and regional government should promote streamlined planning processes and simplify pre-application costs for mobile infrastructure, including revising pricing models to reflect the realities of different types of infrastructure and ownership.
- Local and regional government sector representatives should collaborate with the mobile and telecommunications sectors to improve understanding of the planning system, constraints and local need.
- Across local plans and local growth plans, authorities should consider digital infrastructure.
- Audit existing connectivity levels and identify priority areas for investment and infrastructure.
- Local and regional governments must work with local skills providers, education institutions, and industry to support upskilling and the creation of a digital skills pipeline.

Industry and Regulatory Bodies

- Ofcom must further improve mobile coverage mapping granularity and continue to incorporate user experience metrics, working beyond the data received from MNOs.
- MNOs should use the same methodology when reporting on their connectivity coverage to Ofcom.
- The mobile and telecommunications sectors should collaborate with local government sector representatives as well as communities to improve understanding of the planning system, constraints and local need.
- Wherever possible, the sharing of digital infrastructure is essential to minimise visual impact and costs. It should be the primary focus when assessing local infrastructure needs.

Introduction

This report presents the findings of the Digital Communities All-Party Parliamentary Group's thematic inquiry into complexity of the UK digital connectivity landscape and the measures required to accelerate digital infrastructure across the UK. Drawing on evidence from industry stakeholders, local government representatives, and community organisations, the report examines current initiatives, identifies persistent challenges, and proposes recommendations to foster collaboration and drive progress.

The cross-party consensus on the importance of digital connectivity is encouraging. This report, and the work of the APPG, serves as a timely opportunity to reaffirm the strategic importance of connectivity – both fixed and mobile – as a driver of individual opportunity and national prosperity.

Enhanced connectivity will ensure that residents and businesses across all regions have access to reliable, high-speed digital services. This will improve educational outcomes, enable adults to upskill, support a coherent skills pipeline, and unlock access to better-paid employment. It will expand the UK's talent pool, boost productivity, and stimulate reinvestment into local economies - driving regeneration and revitalisation that underpin national economic renewal.

Successive governments have rightly prioritised digital infrastructure, but closing the UK's digital divide will require sustained, coordinated action across all sectors. A combination of strategic investment, regulatory reform, and strengthened local-national partnerships is essential to realise the economic, social, and environmental benefits of world-class digital infrastructure.

All aspects of the UK's digital connectivity landscape require thorough and independent scrutiny. The APPG strongly recommends that the UK Government commissions a comprehensive review, encompassing both fixed and mobile networks, as well as Ofcom's effectiveness as the sector's regulator. This review should also assess how the industry engages with communities and collaborates with local, regional, and national government – and vice versa – alongside a full evaluation of the regulatory framework and ongoing initiatives. The aim must be to identify areas for improvement and to capture lessons learned.

Given the scale and complexity of these challenges, such a review is a significant undertaking. Yet, with the UK rapidly losing ground in digital advancement, urgent action is essential. Only by commissioning this independent review can the UK unlock new growth, expand social and enterprise opportunities, and reclaim its position as a global leader in technological innovation and adoption.

Digital Connectivity: Mobile

Initiatives and Regulation

Shared Rural Network

The Shared Rural Network (SRN) is a collaborative initiative designed to improve mobile coverage and boost connectivity across the UK, with a focus on rural and hard-to-reach areas. It brings together the major mobile operators - EE, Virgin Media O2, Vodafone, and Three[1] - in a joint effort to expand 4G coverage.

Launched in 2020, with backing from central government and the telecoms regulator, the SRN employs a hybrid funding model that blends public grants with private investment. Government support targeted the most challenging locations, while operators were incentivised to extend coverage into areas where competitors already operated. This strategy fostered rare industry-wide cooperation and network sharing.

By autumn 2024, the SRN had exceeded its key milestone: providing 4G coverage from at least one operator across 95% of the UK's landmass, well ahead of the original December 2025 deadline. This success highlights the effectiveness of the public-private partnership and the strong collaboration among operators.

Ofcom's November Connected Nations report confirms that 4G coverage from at least one MNO now spans 96% of the UK and extends beyond 99% of UK premises. UK-wide coverage from all four MNOs stands at 82%. Despite this data, efforts continue to improve access, with a major focus now on integrating sites built by the Home Office for the Emergency Services Network (ESN). Although the ESN is not yet operational, over 48 of these sites are already supporting commercial traffic for all four operators, with plans to upgrade around 190 sites to higher standards using DSIT funding.

Attention is also turning to the final phase of the SRN - the "total not-spot" challenge. Following the programme's early success and a change in government in summer 2024, there is now an opportunity to reassess how public funds can deliver greater value. The goal is to move beyond landmass coverage and prioritise broader benefits for rural communities through smarter investment and policy reform.

Connectivity in tourism-dependent areas remain a concern. Overlapping networks means the SRN does not fully address coverage gaps. Roaming, though it challenges competitive norms, is essential in such regions. Neutral hosting – shared infrastructure among operators – offers a potential solution but has only been deployed in specific examples such as the London Underground. Neutral hosting and roaming should be considered as part of the APPG's recommendation that the Government conducts an independent review of the UK's digital connectivity landscape.

More broadly, witnesses to this inquiry noted that MNO investment has not kept pace with rising demand for reliability and capacity. Witnesses also noted how profitability challenges and high costs (especially for rural deployment) limit incentives to invest in harder-to-reach areas. It must be recognised that SRN is a public-private model of investment, and the Government must ensure it plays its part and fairly contributes investment that matches rising demand for reliability and capacity.

[1] Note merger of Vodafone and Three (2025)

5G Deployment

While great strides have been made in 5G deployment, the future of UK-wide 5G faces both technical and political challenges, despite its potential to transform connectivity.

5G coverage outside of premises from at least one MNO now ranges between 94% and 97%, based on Ofcom's Very High and High Confidence levels. Individual MNOs report 5G coverage outside of premises of between 64% and 89%, at Ofcom's High Confidence level.

According to a report by the Social Market Foundation (SMF) – supported by APWireless – the UK currently ranks 30th out of 39 countries for 5G performance – falling significantly short of the Government's ambition to deliver high-quality 5G in all populated areas by 2030.

The SMF identifies the key barrier to progress as an investment gap, driven by uncertainty of demand, market structure, limited availability of land and property for infrastructure, and inefficiencies in the planning system. The SMF report argues that this gap threatens the UK's ability to unlock the estimated £159 billion economic benefit of 5G by 2035 – more than £500 per person. Witnesses from the mobile sector would contest that the limited availability of land and property as a barrier, citing significant deployment and upgrades to existing infrastructure.

Witnesses to our inquiry noted that 4G continues to perform well in many areas, particularly those with low population density and minimal network congestion. In such regions, 4G meets most user needs, reducing the perceived urgency for 5G. However, in densely populated urban areas, where data demand is high, 5G becomes essential - much like how high-capacity transport systems such as the Underground are vital in cities but unnecessary in rural villages.

The true promise of 5G lies in its ability to support more users and data with greater energy efficiency and improved spectrum usage. Over the past five years, mobile operators have seen an increase in usage and subscribers, yet expanding infrastructure remains costly, not only in capital but also in energy, transmission, and maintenance.

5G Standalone

A witness participating in the inquiry highlighted that the sluggish progress of 5G deployment in the UK is largely due to an outdated market structure, which fails to exert sufficient competitive pressure on the major providers to invest robustly in 5G infrastructure. Smaller operators, meanwhile, lack the necessary scale to drive significant investment. The recent merger between Vodafone and Three is expected to create a third major competitor with the capacity to make substantial investments in standalone 5G technology.

Ofcom's latest Connected Nations publication reports that "5G SA coverage from at least one MNO reaching 83% at the High Confidence level and 74% at the Very High Confidence level in areas outside of premises, and reported 5G SA deployments accounting for approximately 41% of all 5G sites."

The Government's target of delivering high-quality standalone 5G to all populated areas by 2030 is being pursued through commercial means, with no direct government funding allocated for this purpose. As part of the Vodafone-Three merger, the newly formed company has pledged an additional £11 billion investment to extend advanced 5G coverage to 99% of the UK population over the next ten years. Other networks have made similar commitments in their respective plans.

Continued investment

It is important that this investment is supported by a conducive regulatory and policy environment. Over the past decade, there has been a high turnover of ministers and officials involved in digital policy, which has disrupted progress and created uncertainty. The outsourcing of BDUK as an executive agency, for example, was seen as a move that lacked clear strategic focus. We supported the announcement that BDUK will be integrated into the Department for Science, Innovation and Technology this year (2025).

Industry representatives argued that the £320 million in annual licence fees should be reinvested into network expansion, particularly in underserved areas. They also advocate for business rates holidays to make investment in harder-to-reach regions more viable.

Similarly, planning reform emerged as another critical area. Witnesses called for digital champions to be funded across local and regional governments to facilitate smoother engagement between operators and communities, and to improve public understanding and reduce resistance to infrastructure development.

While the Vodafone-Three merger and pledged investment commitments represent a major opportunity to reshape the UK's mobile landscape, realising this potential will require coordinated action from government, regulators, and local authorities – to reform planning, streamline regulation, and support infrastructure deployment across both urban and rural areas.

Legacy Network Transition

Evidence gathered raised the issue of retiring outdated networks (2G and 3G) to free up spectrum for more efficient and advanced mobile services. While this transition is necessary to support modern connectivity demands, it is not without risk. Concerns were voiced about the potential impact on individuals and technologies that still depend on these legacy networks.

Communication around these transitions remains a challenge and there are also broader concerns around digital inclusion and consumer awareness. Many users - especially those in vulnerable groups - may not fully understand how their devices connect or whether they rely on outdated networks. To address this, mobile operators are working closely with the Government, national bodies and local authorities to raise awareness. They have collaborated with teams managing the Public Switched Telephone Network (PSTN) switch-off on the ground and are distributing communications to help organisations understand the timeline and implications of mobile network changes.

Network operators are calling for additional government support to help reach affected users and ensure that no one is left behind and that essential services do not suddenly stop working. It is critical that businesses and service providers audit their systems to identify any devices still reliant on 2G or 3G and take appropriate steps to upgrade or replace them. This also includes local authorities who should perform an audit of the technology they own to understand what might be impacted.

3G switch-off

The 3G switch-off has been implemented in three phases. The initial phase involved decommissioning capacity-only sites that had been built to manage network overloads; these removals had no impact on customer experience. The bulk of the switch-off took place in 2024, and from a user perspective, 3G is now effectively retired. The final phase, to be completed by 2025, will focus on areas where 4G coverage is still being expanded, ensuring

that service continuity is maintained. The operator expressed confidence that coverage will remain robust throughout the process.

Most mobile users have devices equipped with multiple antennas allowing them to seamlessly connect to 4G or 5G networks when 3G signals are no longer available. Very few people still use 3G-only devices, and those who do typically have access to newer networks through hardware upgrades.

The switch-off has delivered positive outcomes, particularly with the reallocation of spectrum to strengthen the 4G network. This newer infrastructure is more efficient and sustainable than maintaining legacy 3G systems. Such transitions are infrequent, but they are essential. Technologies like 4G and 5G offer significantly greater capabilities: 4G enables full mobile internet access, which is vital in today's digital society, while 5G supports a much higher volume of devices and data traffic.

2G switch-off

Businesses may unknowingly rely on 2G-based services, and operators often face criticism for service disruptions caused by third-party products that depend on outdated networks. A particular difficulty lies in identifying and managing devices using international roaming SIMs or third-party services, which are often sold independently.

Lessons learned from the 3G switch-off are being applied to the upcoming 2G phase-out, which presents more complex challenges due to the wider range of legacy devices still in use. This is particularly evident in sectors such as automotive, where many vehicles continue to rely on 2G modems for diagnostics and emergency alerts.

In the Digital Communities APPG's first report, Care to connect, which examined the impact of the PSTN migration, the Group called for a national awareness campaign to support greater understanding of the switch-off of mobile networks and the implications for businesses and residents. BT and VMO2, alongside government, ran a summer-long campaign calling on residents and their respective support networks to engage in the switchover and take any necessary steps to minimise risk. Our report argued that this campaign should go further and explain why network switch-offs can deliver better overall access.

The issues and recommendations outlined in our report bear relevance to the aims of a potential campaign about the sunsetting of 2G/3G networks. This includes centralised coordination and leadership from DSIT and utilising local and regional governments as well as the voluntary and community sector to support with raising awareness about the switch off.

Coverage Mapping and Consumer Experience

Role of Ofcom and Data Sources

As the regulator, Ofcom is responsible for providing data on the state of mobile coverage across the UK, as set out in the Communications Act 2003. Despite improvements, a gap persists between official reports and the lived experiences of people-particularly in rural and coastal communities. Poor connectivity continues to affect local businesses, councils, and residents, undermining economic activity, public services, and quality of life.

Ofcom's data combines operator-supplied predictions with crowdsourced performance data from millions of handsets. Each mobile network operator (MNO) uses its own modelling approach, which introduces variability. This data informs Government policy and target-setting in partnership with industry.

Modelling and Accuracy

Until recently, Ofcom modelled coverage using 100m x 100m grids based on signal strength. It now uses 50m x 50m grids and higher signal thresholds to better reflect real-world experience. While this finer granularity is an improvement, it does not fully resolve inherent limitations in operator modelling. Factors such as topography, building materials, congestion, and interference – especially in urban and edge-of-cell rural areas – remain largely unaccounted for.

Not-spots

The remaining ~4% of UK landmass without mobile coverage reveals a complex interplay between geography, environmental protection, and infrastructure policy. This uncovered portion of land is not simply a technical gap; it represents some of the most remote and environmentally sensitive areas in the country. While the official landmass calculation includes rivers and lakes, the vast majority of this 4% lies in mountainous terrain, particularly in the Scottish Highlands.

These regions are not only difficult to reach physically but are also subject to strong cultural and environmental protections. Concerns are rooted in preserving the untouched character of these landscapes. This opposition presents a major challenge for operators who must balance the need for connectivity with respect for local values and environmental stewardship.

In contrast, witnesses to this inquiry argued that national parks across England and Wales, such as the Lake District, North York Moors and Snowdonia, have shown a more pragmatic approach. It is felt that these regions have recognised the importance of mobile connectivity for safety, tourism, and local economies, and have been more open to working with operators to find suitable solutions. Even in areas of natural beauty, there is a growing understanding that digital access is not a luxury but a necessity.

These issues highlight the need for nuanced policy and engagement strategies. A one-size-fits-all approach to infrastructure deployment won't work in these final frontier areas. Instead, collaboration with local communities, environmental bodies, and planning authorities is essential. Solutions may include more discreet infrastructure designs, shared masts, or alternative technologies like satellite connectivity where terrestrial networks are not viable.

Bridging this last 4% is not just about technical feasibility – but also navigating cultural sensitivities, environmental priorities, and the evolving expectations of rural communities. As digital access becomes increasingly essential for everything from healthcare to education to emergency services, the pressure to find balanced, respectful solutions will only grow.

Policy Implications

Efforts have been made to balance operator data with user experience, but accurately capturing lived experience remains challenging. Concerns were raised concerning an apparent reliance on MNO-supplied data, particularly as this same data influences Government-set connectivity targets that the operators are then expected to meet. Differences in modelling approaches between MNOs further complicate consistency and accountability.

During this inquiry, it was reported that some local authorities use portable data collection devices in council vehicles to gather granular, street-level mobile signal data across all networks. Street-level data may allow councils to hold operators accountable, plan infrastructure, and inform residents about actual coverage. However, only about 40% of the UK is currently covered by such initiatives, and data is limited, representing only a snapshot in time on a moving vehicle. Organisations like Streetwave – a witness to this inquiry – acknowledged their own limitations but unveiled efforts and partnership working with both Ofcom and councils to go further.

The Digital Communities APPG emphasises the need for Ofcom to further enhance how it gathers and shares mobile coverage data with those that depend on this information – consumers, businesses, and policymakers across every level of government. Enhanced and reliable data is crucial for individuals choosing a mobile network, for organisations making financial and investment decisions, and for authorities evaluating planning applications for new digital infrastructure.

Alternative approaches to collecting coverage data, such as those used by companies like Streetwave – which often reveal a very different picture of coverage – should be considered and incorporated into official reporting. The APPG urges Ofcom to adopt a more assertive approach in scrutinising MNOs and when it engages government to ensure data accuracy and accountability is at the heart of policymaking.

The Government has clear and ambitious priorities for technology and the role it can play in driving economic growth – 5G Standalone, AI and AI Growth Zones and data centres. However, this will inherently be limited if the Government does not come to terms with the fact that the foundations on which this will all be built on is not fit for purpose for the everyday let alone for the future. Unless residents and business have access to a dependable 4G network, the Government's growth aspirations will never be attainable. It's not just the technology that residents and businesses need to be confident in, it is also about how confident they are in themselves to be get online and upskill themselves. A comprehensive skills strategy and pipelines is needed that sets out how address the skills gap now but retain an eye on the future, ensuring that no generation, past, present or future, is left behind.

It is also recommended that the Government launches a new initiative to 'name a not-spot'. Such as scheme would encourage local authorities to work in partnership with relevant stakeholders to put forward a submission that evidences where there is a not-spot in the locality making the request for additional funding and support to address the issue.

Digital Connectivity: Broadband

Initiatives and Regulation

Gigabit and fibre capable coverage

According to Ofcom data, gigabit-capable coverage stands at 87%. It also reports that "Full fibre is available to 78% of those premises, an increase of nine percentage points from last year. Full fibre is also available to 78% of SMEs in the UK."

However, this coverage is uneven: urban areas reach 91%, while rural areas lag significantly at 62%. The same Ofcom data, reports that 81% of urban areas across the UK enjoy access to full fibre compared to just 61% of rural areas.

For UK small and medium-sized enterprises (SMEs), 78% have access to a full-fibre network. 84% have access to a gigabit-capable network. Both represent an increase on last year.

Urban centres benefit from dense populations, established infrastructure, and higher demand, making them natural priorities for investment. In contrast, rural areas face higher deployment costs and lower population density, reducing their commercial appeal.

Project Gigabit

The Gigabit Voucher Scheme, part of the broader Project Gigabit initiative, was designed to improve broadband connectivity in rural and hard-to-reach areas. While the intention behind the scheme is welcomed, the practical implementation has revealed several challenges that communities and individuals have had to navigate.

One of the most significant hurdles is the level of community involvement required to get the scheme off the ground. For the voucher scheme to succeed, it often depends on the presence of a highly motivated individual who is willing to take on the responsibility of organising and driving the project forward. This person must not only rally the community, but will need to manage communications, build and maintain relationships with providers, and shoulder a considerable amount of administrative work. Anecdotal evidence heard at this inquiry suggested that in one area it took nearly two years of persistent effort before the implementation phase even began.

Financial risk is another major concern. Residents are often asked to make long-term financial commitments, which can be daunting, especially in areas with older populations who may not see the value in high-speed internet. The scheme requires nearly full community buy-in, which is difficult to achieve in sparsely populated or geographically challenging areas. This is compounded by the fact that the voucher scheme pays based on actual connections rather than premises passed, meaning that unless a large enough portion of the community commits, the project may not be financially viable for providers.

In contrast, Project Gigabit contracts operate on a different model, where payments are made based on the number of premises passed, regardless of whether those premises make the connection. This makes planning and execution more straightforward for providers, but it doesn't guarantee that residents will actually receive service. This discrepancy between the two models highlights a fundamental tension: while the voucher scheme incentivises actual usage, it places a heavier burden on communities; Project Gigabit simplifies deployment but may leave some homes unconnected.

Infrastructure limitations further complicate matters. Homes located down long driveways, behind other properties, or in areas with difficult terrain often get excluded from both schemes. Even if a property is technically subsidised, it may remain unconnected due to logistical challenges or high costs. This has led to frustration among residents who find themselves ineligible for further support despite lacking usable broadband access.

There is also a need for ongoing awareness and communication. Local and national government must continuously promote the scheme with the public to help maintain momentum throughout what is often a lengthy process. Without this, interest will wane, and projects may stall.

While both the Gigabit Voucher Scheme and Project Gigabit have their merits, neither offers a perfect solution. A hybrid approach that combines the strengths of both - with more flexible funding models and tailored infrastructure solutions - could better serve the homes that are the hardest to reach and require alternative technologies or creative engineering solutions to connect.

Altnets

Our inquiry briefly examined the role of alternative network providers (altnets) in addressing connectivity gaps, particularly in rural and coastal areas. These providers can be effective in deploying fixed fibre and wireless networks where traditional infrastructure is lacking. Altnets now cover over a third of UK premises, with 16.4 million premises passed by the end of 2024 and significant investment in rural areas.

Altnets have made significant progress, with Wildanet, for example, connecting 75,000 premises in Cornwall to gigabit-capable full fibre. Nationally, altnets have invested an estimated £165 million, with rural regions the primary target for this investment. Initially funded by private investment, these efforts are now supported by government initiatives such as Project Gigabit, which has accelerated rollout in underserved areas.

Market saturation may cause some altnets to exit or be acquired by bigger firms. This will, to an extent, impact consumer choice and accessibility, but it also represents natural market churn. The Government must keep this in mind, particularly when reflecting on concerns raised during this inquiry about the significant influence of Openreach and its monopoly in the sector.

Digital Connectivity: Infrastructure

Governing regulations

It is important to acknowledge that this report was drafted and circulated for clearance before the Government issued its response to the Draft regulations for Sections 61 to 64 of the Product Security and Telecommunications Infrastructure Act 2022 consultation.

The Government is of the view that the 2017 Reforms were necessary to support faster, more cost-effective rollout of telecommunication networks. In its response, the Governments states that '*The majority of respondents to the consultation agreed that the Draft Regulations were sufficiently clear (subject to some technical proposed drafting changes which have been taken into account) and will give effect to delivering a clear transition between the valuation frameworks.'*

Secondary legislation commencing Sections 61 to 64 of the Product Security and Telecommunications Infrastructure Act 2022 has been made, with a coming into force date of 7 April 2026.

Since the 2017 reforms to the UK's telecoms regulations – notably the introduction of the Electronic Communications Code (ECC) and, later, the Product Security and Telecommunications Infrastructure (PSTI) Act – the mobile industry has delivered significant progress in expanding and upgrading networks.

According to the Mobile Infrastructure Forum (MIF), more than 33,500 4G and 5G service upgrades have been completed, and over 4,600 lease agreements have been reached consensually with landowners, reflecting a deliberate shift by operators towards collaboration rather than legal confrontation. Despite these achievements, around 6,200 mobile sites – approximately 16% of the total – remain under legacy legal frameworks such as the Landlord and Tenant Act 1954.

APWireless – an investor in UK mobile telecommunications infrastructure – informed the inquiry that the introduction of the utility-style valuation model under the ECC reforms has led to a significant rise in legal disputes over site agreements. Since 2017, over 1,000 legal cases have been initiated, compared to just 30 in the previous three decades. APWireless links the increase in legal disputes to the reduction in rents paid to landowners, which has led many to challenge the resulting decrease in their income from hosting telecommunications sites.

However, MIF challenges this perspective, stating that fewer than 40 cases have proceeded to a full hearing, and that improvements to connectivity have continued throughout this period. MIF also argues that the increase in disputes is due more to difficulties in contacting landowners – given that the notification system is often the only means of initiating dialogue – rather than rent disagreements alone.

The Analysys Mason review of international markets found that, since 2017, the UK's mobile performance and 5G rollout have lagged behind peer countries such as Germany, France, Spain, Italy, and the USA. The UK now ranks last amongst peers in most key indicators, including 5G availability and base station density, with the lowest number of macro sites per 1,000 inhabitants. These findings reinforce the Social Market Foundation's warning that the UK is "far behind" and risks missing its target of high-quality 5G coverage by 2030.

Beyond land access, planning system constraints remain a bottleneck. The average mobile infrastructure application takes six months to decide, and in some areas up to 18 months to

complete from application to operation. Cuts to planning resources and a lack of digital expertise in local authorities compound the delays. The SMF estimates that halving decision times could result in over 1,600 additional 5G cells by 2030.

Operators stress that mobile connectivity is now essential for the functioning of community facilities – from sports clubs reliant on wireless payments and social media, to hospitals and rural enterprises. A single mast can boost coverage for entire surrounding areas, delivering both social and economic benefits.

While legal and logistical obstacles remain, the reforms of recent years have created a platform for progress. The priority now is to restore and retain investor and landowner confidence, align regulation with market incentives, and fully implement the PSTI Act to extend modernised frameworks to all remaining sites.

However, in doing so, the Department for Science, Innovation and Technology should actively promote Ofcom's Code of Practice on the ECC, encouraging collaboration and compromise among stakeholders. With this guidance the sector can continue to enhance and maintain the reliability of vital communications services for everyone. When combined with targeted planning reform and a renewed focus on collaboration, it would help close the UK's 5G investment gap – estimated between £20-37 billion – and ensure that connectivity improvements reach even the most underserved communities.

Infrastructure Sharing – fixed broadband

Witnesses to our inquiry argued that a distinction should be made between sharing infrastructure that has just been deployed by a new entrant and accessing legacy infrastructure owned by incumbents like Openreach or National Grid. They argued that the business case for sharing newly built infrastructure is fundamentally different - new deployments are often tailored to specific business models and cost structures and sharing them can dilute their value or complicate operations.

It was suggested that the current regulatory framework for infrastructure access is inefficient and costly. One witness cited the example of a company that spent three years and tens of thousands of pounds just to gain access to three poles owned by a competitor. While in the end successful, they argued that this demonstrated how the process was prohibitively slow and costly.

Participants agreed that regulatory improvements are essential to make infrastructure sharing more viable. This includes:

- Streamlining access procedures to reduce delays and administrative burden.
- Revising pricing models to reflect the realities of different types of infrastructure and ownership.
- Providing clearer policy direction to encourage cooperation between incumbents and new entrants.
- Investing in education and resources for local authorities, who often play a gatekeeping role in planning and infrastructure deployment.

Without these changes, infrastructure sharing risks becoming a bottleneck rather than a solution - especially as the UK pushes toward universal gigabit coverage and seeks to address the final 10% of hard-to-reach properties. There is a clear need for more proactive public education, better planning coordination, and a more supportive framework for infrastructure sharing.

Digital Connectivity: Economic value

Driving inclusive growth
The UK Government has set out ambitious national objectives to drive economic growth and promote regional equality, placing digital connectivity at the heart of these efforts. The Government's Plan for Change identifies five key priorities: stimulating economic growth, building a modern NHS, enhancing public safety, removing barriers to opportunity, and establishing Britain as a leader in clean energy.

A digitally connected and inclusive society is fundamental to achieving these aims. However, areas with poor connectivity risk falling into a cycle of exclusion, where limited access to remote work, online education, and digital services deepens social and economic inequalities.

Evidence from the Lloyds Consumer Digital Index shows that regions with weaker digital infrastructure experience higher levels of digital exclusion, which further disadvantages residents. Without affordable, high-speed internet, opportunities for skills development, employment, and community engagement are restricted, perpetuating deprivation.

Improving connectivity is essential for economic growth, but it must go hand in hand with digital inclusion. Councils need support and resources to overcome challenges and maximise the benefits of digital infrastructure for their communities, while actively working to close the digital divide. This requires collaboration across all levels of government, as well as with the private and voluntary sectors.

According to a report commissioned by the Rural Coalition, productivity in rural England is 20% lower per worker than in Scandinavian countries. If England matched Scandinavian productivity, the government could have gained an estimated £19 billion in additional tax revenue in 2021. Digital access is a major factor in this gap, alongside issues like affordable housing and public transport.

To address these challenges, digital inclusion must be prioritised alongside infrastructure investment. The public sector should work together to bridge the digital divide by promoting digital skills, ensuring affordable connectivity, and providing targeted support for vulnerable and excluded groups.

Investment
As outlined within the UK Wireless Infrastructure Strategy, it is projected that widespread adoption of 5G can bring a productivity benefit of £159 billion by 2035. 5G connectivity will also play a key role in underpinning new technologies and supporting modern public services, as recognised and supported through DSIT's 5GIR (5G Innovation Regions) programme.

A report by Openreach and Cebr suggested a potential £73bn boost to UK productivity by 2034 through nationwide Full Fibre. Delays to the rollout of 5G alone could cost the country tens of billions of pounds in lost economic output to the tune of £41 billion.

Digital Connectivity: Power of local

Local government coordinators:
The Government's Plan for Change, sets out a clear ambition: to simplify the development of essential infrastructure-such as roads, railways, broadband, and laboratories-needed for a thriving modern economy.

Local government plays a pivotal role in realising the UK's digital connectivity goals. With responsibilities spanning local growth, planning, highways, and place-making, councils are crucial partners in driving economic development and ensuring that all regions benefit from next-generation digital infrastructure. However, this vital work is challenged by a significant £6.2 billion funding gap, leaving local authorities under-resourced and facing workforce shortages.

Delivering digital connectivity projects requires collaboration among a wide range of local, regional, and national stakeholders. Effective leadership and substantial capacity are essential to coordinate these efforts and achieve meaningful results. Evidence shows that councils with dedicated digital strategies are more likely to prioritise and accelerate connectivity rollouts. Yet, those with limited financial resources often struggle to implement such strategies, making it harder to reach underserved communities.

To deliver connectivity and tackle digital inclusion-two sides of the same coin-local government must be empowered, properly funded, and supported. This includes investment in additional capacity and skills development, as well as more effective mechanisms for bringing together national government, regional bodies, regulators, and industry. Without meaningful investment in capacity, skills and strategic engagement, councils cannot be truly responsive to local needs and challenges.

Devolution and Local Government Reorganisation (LGR)
The Government has embarked on an ambitious programme to devolve powers from Whitehall and into local areas, as well as reorganising local government to simplify structures and streamline resources.

Discussion on devolution and local government reorganisation reflects both optimism and concern about how these changes could affect digital infrastructure development. On the one hand, there's agreement that empowering local authorities - especially those with a good understanding of infrastructure - can create opportunities for more responsive and effective planning. However, there are significant concerns about how funding is distributed, the lack of local accountability from larger structures of local government and regionalised decision making.

When local leaders are engaged and informed, they can tailor digital strategies to meet the needs of their communities. However, if the government continues to use competitive bidding processes for digital infrastructure investment, it risks favouring the same well-resourced regions repeatedly. These areas often have the capacity to apply for and manage funding, while others may not even apply.

The challenge is therefore to balance local autonomy with national oversight. Recognising digital inclusion in devolution and integrated settlement negotiations is seen as vital with multi-year allocations tied to local plans. Furthermore, central government contracts and programmes should cover the full costs of participation for local partners, not just delivery, including co-design, evaluation, and staff time.

Digital infrastructure needs to be treated strategically, rather than being fragmented across district council-level planning systems. Operators work nationally, and planning decisions made in isolation at the local level can hinder broader connectivity goals. Combined authorities have shown success in coordinating transport infrastructure, and there's a call for digital infrastructure to be approached in a similar way.

A more coherent and inclusive approach to digital infrastructure - one that combines local engagement with national strategy, ensures equitable funding, and is supported by stable, knowledgeable leadership at the centre - is essential for success.

Data sharing and data gaps:
There is a significant issue with the quality of data that is underpinning policy decisions, for example Ofcom data, and the lack of data sharing between national government, bodies like BDUK and Ofcom with local authorities. This makes it challenging for councils to supplement data available with local data and understanding, and to respond to local need without an understanding of the challenges in their local areas.

There is also a lack of data sharing from network operators regarding take up of broadband packages which leads to an incomplete picture of digital inclusion. Greater data sharing promotes better decision-making.

Telecommunications operators rely on data and insights to determine where to prioritise infrastructure rollouts. However, without close collaboration with local councils, operators may miss nuanced, localised needs. Councils possess invaluable insights into underserved areas that often lack the market incentives that drive private-sector investment, making them reliant on targeted interventions.

Councils also hold levers over barriers to deployment, and opportunities for leveraging public assets, improved coordination with industry on these issues may provide potential to accelerate rollouts. The existing challenges with Ofcom data at local levels also make hyperlocal data on connectivity figures inaccurate, adding a further challenge to effective coordination. This illustrates a key role in aligning digital connectivity priorities with digital inclusion activity, ensuring resident insights are informing decision making & interventions. Without effective channels to communicate these insights, councils and operators risk perpetuating the digital divide across vulnerable communities.

Planning permission delays and planning capacity
One of the key barriers to achieving universal mobile and fixed connectivity is the planning system itself. Local authorities face delays in granting planning permissions for digital infrastructure projects due to under-resourcing and a complex regulatory environment. Planning difficulties also rise through objections based on a lack of public understanding about what digital infrastructure looks like or why it needs to be placed in specific locations.

The problem
There are significant challenges in recruiting and retaining council planners.

Adjusted for inflation, the total expenditure on planning, including development management and other planning policy, has decreased by 16.6% since the financial year ending (FYE) 2010, according to the Royal Town Planning Institute (RTPI)'s latest State of the Profession report. The same report also highlights that around 21% of respondents in England will be leaving the planning profession in the coming three years.

Local authorities face delays in granting planning permissions for digital infrastructure projects due to this under-resourcing and a complex regulatory environment. For digital infrastructure deployment, this issue is an even more acute problem with planners lacking the skills and expertise to manage the volume and varied nuance of applications, especially ones that can balance competing interests across urban design, viability, heritage, ecology and legal.

The planning system itself tends to attract objections rather than support, and local councillors may be swayed by vocal opposition rather than broader public need. This dynamic discourages proactive promotion of digital infrastructure, despite widespread public support. Witnesses to this inquiry reported that when planning applications are rejected, they often succeed in court appeals, with a success rate as high as 85-90%. This would suggest that many initial refusals are based on weak or uninformed grounds, adding unnecessary costs and delays for both councils and operators, all to the detriment of residents and local businesses.

Witness discussions highlighted a stark contrast in how different local authorities approach mobile infrastructure development, particularly in the rollout of 5G. In some areas, such as Swansea Bay, councils are actively supportive - engaging with operators, waiving costs, and prioritising digital connectivity as essential for economic growth, education, and healthcare. In contrast, other areas impose high and inconsistent costs for planning applications and pre-application discussions, creating a sense of arbitrariness and friction. This inconsistency, combined with a lack of planning resources and technical understanding, leads to frequent rejections of mobile infrastructure proposals - even in places where connectivity is urgently needed.

Witnesses also argued that the planning process is often inconsistent and can be costly. Pre-application fees, albeit for different levels of service, can vary with no clear justification for the disparity made to operators. Follow-up discussions can also be an additional and hefty cost to operators, with feedback that the quality and consistency of engagement is often mixed.

Anecdotal evidence suggested that the average time for an application to be decided is six months, and it can take up to 18 months for a site to become operational. These delays hinder connectivity improvements. Estimates suggest that speeding up the planning process by just three months could result in 1,600 additional 5G cells being deployed by 2030. To overcome these challenges, panellists urged Parliamentarians to play a more active role in scrutinising the implementation of network upgrades and advocating for legislative changes.

Regulations remain a major barrier. One witness reported submitting over 300 planning applications in two years and strongly supports reform to streamline the process. They emphasised that planning outcomes are heavily influenced by site selection, which involves complex considerations including power availability, visual impact, political context, and land access.

Despite the Government's current focus on planning reform, it was suggested that digital infrastructure is often overlooked in favour of housing and data centres. Yet, connectivity is foundational to modern economies. Digital infrastructure should be treated as critical national infrastructure, and planning reform must reflect that reality to ensure the UK can meet its digital ambitions.

The planning system is also under pressure from other major infrastructure demands, including water, energy, electric vehicle charging, and future 5G networks, which will require even denser infrastructure. Without urgent investment in planning capacity, the UK risks falling further behind.

There are ongoing concerns regarding the distribution of government funding, as much of it is allocated through competitive bidding processes. This approach tends to favour better-resourced local authorities, leaving those with fewer resources at a disadvantage and potentially widening the digital divide. Notably, areas that have established digital champions experience progress at a rate four times greater than others, underscoring the crucial role of strong local leadership and dedicated support.

The solution

In a bid to find a way forward, industry representatives are calling for more consistent planning policies, better public awareness of the benefits of digital infrastructure, and stronger government support to overcome local resistance. They believe that without these changes, the UK risks falling further behind in the global race for digital connectivity.

An alternative approach discussed was neutral hosting, where a single mast is shared by all operators. While technically feasible, it has yet to be widely implemented in practice. There are also calls for planning decisions to give greater weight to socio-economic benefits, not just visual impact.

It has been argued that telecom companies could improve their planning success by engaging more proactively with local communities and authorities. One example from Sweden involves integrating digital infrastructure into local master plans, aligning housing development with connectivity goals.

In contrast, UK local plans often lack any meaningful digital strategy, despite the National Planning Policy Framework (NPPF) encouraging digital infrastructure in new developments. Some witnesses argued that existing frameworks like the General Permitted Development Order (GDPO) and the NPPF do not go far enough in supporting digital infrastructure. They called for clearer, more directive language in planning policy.

Some witnesses argued for specialised roles within planning departments, such as "digital champions" or "digital infrastructure planning officers." The placement of infrastructure often depends on specific technical needs, such as spectrum coverage, which planners may not fully grasp. It was felt that a dedicated council officer could support facilitate local engagement and discussions, supporting the passage of applications and improving outcomes.

Broadly, witnesses agreed that:

- There needs to be a balanced planning approach that weighs visual impact against socio-economic benefits.
- Exploring national roaming or neutral hosting in hard-to-cover areas may support tackle not-spots.
- Developing a unified regulatory framework is essential in attracting investment.
- Better integration of digital infrastructure into local planning could address local need and opposition.
- Stronger engagement between industry and local authorities is critical to success.

Streetworks:

Councils face huge challenges in the coordination of digital infrastructure projects, including a greater demand for street works, with a 126% increase in roadworks volume from telecoms street works alone since 2018. Highways teams understand the need for early engagement so as not to delay the rollout of Project Gigabit, however struggle with the capacity to do so due to resourcing restrictions.

This is all within a system that is open to abuse of emergency street works legislation meaning that highways authorities are not always notified of works taking place. Often councils do not receive specific timeframes for the rollout of fibre which compromises the operation of their highway network.

Councils manage their network as effectively as possible under the current regulations, despite limitations. They do so by only allowing contractors or statutory undertakers on the network at specific agreed times/dates, while overlapping works are carefully coordinated to ensure that disruption is kept to a minimum and that traffic/stakeholders can find a viable route around the road network.

Community engagement:
Effective community engagement is critical to achieving national digital connectivity ambitions, ensuring that local voices are heard and considered in the planning and implementation of national initiatives.

Councillors and dedicated council teams play a pivotal role in fostering this engagement, acting as bridges between residents and broader strategic goals. By actively involving communities, councils can identify unique local challenges, uncover underserved areas, and co-create solutions that are tailored to specific needs whilst upholding local democracies and accountability. Meaningful engagement can help mitigate local opposition to planning proposals by building understanding, addressing concerns early, and demonstrating the tangible benefits of improved connectivity.

Councils are also uniquely positioned to support telecoms providers and central government by offering insights into local needs and priorities, enabling more informed decision-making and the development of plans that resonate with the communities they serve. However, there are challenges with how local decision making is factored in, for example through the lack of collaboration inherent in the Electronic Communications Code. Also, councillors are not always aware of the benefits to infrastructure and connectivity projects which can also create tensions within local areas, and political challenges for councillors in engaging with their communities over infrastructure placement.

Digital Champions
Evidence presented to this inquiry has reinforced the recommendation from the APPG's Care to Connect report: the Government should provide ringfenced funding to establish and sustain dedicated digital teams within local authorities.

These teams should encompass a range of specialist roles to effectively tackle the challenges outlined in this report and drive digital transformation. Key positions include:

- **Senior Digital Connectivity Lead** - to provide strategic direction, influence policy, secure funding and build relationships.
- **Digital Connectivity Coordinator** - to facilitate communication, build partnerships, coordinate initiatives, monitor progress, and support funding applications.
- **Digital Infrastructure Planning Officer** - to bridge the knowledge gap, streamline process and support the applications process, address local needs, and promote innovation.
- **Digital Infrastructure Streetworks Officer** - to coordinate activities, develop a permit system, monitor and enforce compliance, promote collaboration.
- **Digital Inclusion Officer** - to identify and address barriers, promote digital literacy, support vulnerable groups, and advocate for affordable access.

Some Combined Authorities and other local government bodies may already have similar teams in place. Where such structures exist, the Government should focus on strengthening their capacity and expertise, while also promoting collaboration across different authorities to ensure consistency and fairness nationwide. This approach should be adopted across all regions of the UK to create a level playing field for digital progress.

The LGA has developed a three-phased plan that sees such a structure mapped across a 9-regions footprint and

Building partnerships:
Achieving these goals will require a coordinated, multi-faceted approach that involves national government, private sector operators, local authorities and the voluntary and community sector. Within the rollout of 5G and gigabit capable broadband, public and private sector organisations should collaborate, locally, regionally and nationally to enable telecommunications companies to accelerate the installation of necessary infrastructure, particularly in hard-to-reach and in-need locations. This must also be done at the political level given concerns regarding infrastructure projects and community engagement.

Stronger partnerships between central government, combined authorities, local authorities, and telecom operators are needed to ensure efficient and equitable infrastructure rollout. Meaningful community engagement must be prioritised, which includes political engagement with councillors as community leaders - particularly regarding infrastructure projects to ensure that local decision making is not undermined, and the benefits of infrastructure projects are understood. Data sharing between national bodies, industry and local authorities must also be prioritised.

Digital Connectivity: Promoting Inclusion

Digital Inclusion Action Plan (DIAP)
The publication of the Government's DIAP was a welcomed first step after 10-years without. We are also pleased to see the broad membership of the Digital Inclusion Action Committee, as a mechanism to engage with the range of stakeholders in the digital inclusion space, and we welcome the focus on industry partnership within this committee.

Witnesses to this inquiry shared concerns about the effectiveness and future of the DIAP. There's a clear desire for a more balanced and strategic approach. The current plan is seen as heavily reliant on industry pledges, with little clarity on what the government itself is committing in terms of investment or long-term support. This imbalance raises questions about sustainability and fairness, especially given that telecom companies are commercial entities with limited scope to address systemic issues like digital poverty on their own.

There's also frustration with the broader governmental approach to digital transformation. Despite recognising the importance of digital growth, government processes and institutions often remain outdated and resistant to change. Ministers sometimes openly admit to lacking digital literacy, which undermines efforts to modernise and deliver inclusive digital services.

This disconnect between policy ambition and operational reality is seen as a major obstacle. One opportunity for advancing digital inclusion lies in the potential switch-off of terrestrial television. This shift could be used to drive broader digital engagement, especially among older demographics who still rely heavily on traditional TV. However, this must be handled carefully. Many people still lack reliable broadband or mobile connectivity, and any move to phase out legacy services risks deepening exclusion unless infrastructure is in place first.

Evidence highlighted a growing sense of disillusionment among the public. Despite high-profile initiatives like the Shared Rural Network and Project Gigabit, many individuals - particularly in semi-rural or edge-of-town areas - report seeing little to no improvement. Some homes are excluded from rollout plans due to technical or logistical challenges, and residents are losing faith that promised upgrades will ever materialise.

Digital inclusion must be treated as a national priority, with coordinated investment, strategic planning, and genuine leadership from government. Without that, even well-intentioned initiatives risk falling short, leaving many communities disconnected and disheartened.

Digital inclusion capacity:
Councils can drive digital inclusion activity, delivered in a localised way in partnership with relevant stakeholders, that best meets the needs of individual residents. However, challenges with resources and capacity limit the realisation of this ambition. The fixed-term nature of many existing programmes, and the intersecting priorities within which digital inclusion sits, makes it difficult to identify exactly how many councils have formal programmes or lead officers. The number is constantly fluctuating, and there is a 'graveyard' of initiatives that once existed.

The Digital Inclusion APPG agrees. In providing contributions to this inquiry, they argued that plans should be rooted in the design and governance of local authorities, recognising their unique ability to bring together cross-sector partnerships spanning health, housing, employment, and the voluntary sector. There is a strong case for funding and strengthening the place-based digital inclusion networks that councils already coordinate - such as libraries, community centres, and grassroots charities - while leveraging councils' local

intelligence and data mapping to target interventions where they are most needed and to avoid postcode lotteries.

To support this, the APPG has long called for the introduction of a cross-government 'Digital Inclusion Embedding Fund', with contributions from multiple departments, to enable councils to draw down resources for long-term strategies.

Digital connectivity as the foundation for inclusion:
Individuals must be able to access the internet whilst also having the motivation, confidence and skills to thrive online. Without access to good and affordable connectivity, the potential £9.48 return for every £1 invested in digital inclusion initiatives will be hindered. Better connectivity also fosters inclusivity by connecting underserved communities. In rural areas, where digital infrastructure gaps are more pronounced, connectivity improvements are vital to ensuring no community is left behind.

There is also a challenge with urban based 'not-spots' which many urban based local authorities believe are not being adequately addressed by network operators or national initiatives which have a focus on rural areas. Addressing urban not-spots requires a different approach which local authorities, as place leaders, can support with.

Embedding digital inclusion into wider public service reform is another priority. The Digital Inclusion APPG suggests making digital inclusion impact assessments a requirement for major reforms in areas such as health and employability, ensuring these services are integrated from the outset. Frontline staff across sectors should be equipped to signpost and support digital inclusion as part of routine service delivery, and investment should be made in wraparound models that go beyond connectivity and equipment, focusing on in-person confidence building, safety, and skills training.

When it comes to digital connectivity rollout, priorities should be aligned with digital inclusion data - such as deprivation, low skills, and rural gaps - rather than purely commercial viability. Critical change moments, like the PSTN switchover or the transition to IPTV, should therefore be treated as opportunities for coordinated support for priority groups.

Social value:
Many councils have been leveraging social value clauses in digital infrastructure projects to fund digital inclusion activity. However, councils' ability to leverage social value clauses effectively is varied depending on capacity and capabilities. Some councils have good examples of initiating effective public-private collaboration on these ambitions, working with industry on schemes such as Greater Manchester Combined Authority's 'GM Wayleaves Agreement' which removes long-standing barriers to broadband access in social housing, and provides a framework for scaling.

Promotion of social tariffs:
Currently, social tariffs from operators are being taken up by only 5% of eligible customers, raising concerns over the promotion, affordability and quality of the tariffs available. There have also been concerns raised about the quality of the social tariff offer from providers which also results in low take up.

Nonetheless, council teams, such as Essex's Digital Essex programme, play key roles in raising awareness of national campaigns and initiatives such as social tariffs and databanks in the most underserved communities. Councils, through formalised digital inclusion activity, can play a key role in marrying national ambitions with local needs, while also supporting

third sector capacity to deliver targeted support to residents to ensure their participation in and benefit of a digital economy and society.

Glossary

- APPG (All-Party Parliamentary Group)
- PSTN (Public Switched Telephone Network)
- PSTI (Product Security and Telecommunications Infrastructure)
- DSIT (Department for Science, Innovation and Technology)
- MNO (Mobile Network Operator)
- ECC (Electronic Communications Code)
- SRN (Shared Rural Network)
- 5G (Fifth Generation Mobile Network)
- Altnets (Alternative Network Providers)
- SMEs (Small and Medium-sized Enterprises)
- BDUK (Building Digital UK)
- NPPF (National Planning Policy Framework)
- GDPO (General Permitted Development Order)
- RTPI (Royal Town Planning Institute)
- LGA (Local Government Association)
- INCA (Independent Networks Cooperative Association)
- CPRE (Campaign to Protect Rural England)
- SMF (Social Market Foundation)
- MIF (Mobile Infrastructure Forum)
- ESN (Emergency Services Network)
- Cebr (Centre for Economics and Business Research)
- GM (Greater Manchester)

Evidence Sessions and Witnesses

The Digital Communities APPG would like to thank the following organisations that gave evidence to this inquiry:

- Gareth Elliott, Director of Policy and Communications, Mobile UK
- Ben Roome, CEO, MOVA*
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*Mova is the operating brand for Digital Mobile Spectrum Limited (DMSL)