CountyAPPG
COUNTY ALL PARTY PARLIAMENTARY GROUP

CCN
COUNTY COUNCILS NETWORK

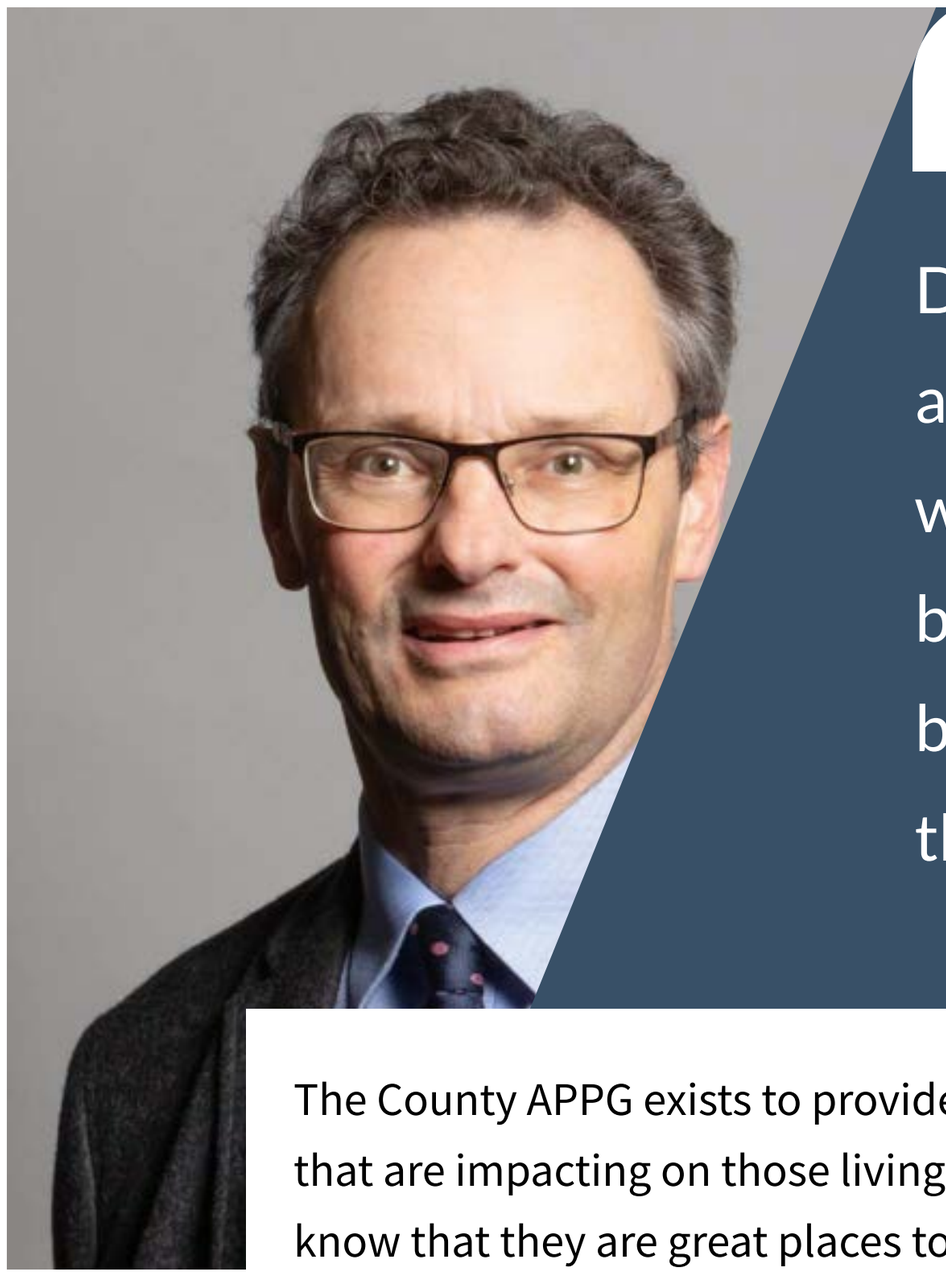
COUNTIES
LEADING **RECOVERY**
DELIVERING **RENEWAL**

COUNTY ALL PARTY PARLIAMENTARY GROUP REPORT

Levelling-Up Digital Connectivity in Counties

October 2021

Foreword - Peter Aldous MP Chair, County APPG



Digital connectivity is not as good in county areas as it is in more urban parts of the country with too many residents on the slowest broadband, at a time when gigabit broadband is being rapidly made available in other parts of the country.

The County APPG exists to provide parliamentarians with the chance to come together and raise issues that are impacting on those living in county areas. As champions and representatives of those areas we know that they are great places to live and work.

Events of the last year have underscored how important access to digital technology is for our everyday lives, with lockdown leaving many of us reliant on broadband connections to work, go to school or keep in touch with family and friends.

However, digital connectivity is not as good in county areas as it is in more urban parts of the country with too many residents on the slowest broadband, at a time when gigabit broadband is being rapidly made available in other parts of the country.

This report explores why digital connectivity needs to be levelled-up in our county and rural areas and some of the challenges faced by our communities from poor connectivity. It outlines how the Government's investment in infrastructure and gigabit broadband provides opportunities for this to be addressed.

Digital technology will be increasingly important as we enter the final phase of reopening workplaces and society, given longer-term shifts in working practices and the key role digital connectivity can have in securing economic recovery.

It is therefore critical that county areas are able to benefit from the government's investment in the roll out of superfast and gigabit broadband, but there are other areas where action is needed to ensure that county and unitary councils have the powers they need to secure a better digital network

This report contains recommendations that if taken forward will help level-up digital connectivity in our counties. The APPG hopes that the government will continue to engage with county and unitary authorities on these issues, ensuring that the areas we represent can continue to secure the economic and social benefits that can be reaped from improved connectivity.

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About us

The County APPG is a forum for parliamentarians to consider the critical issues and challenges faced by county areas and their communities. It promotes the current and future contributions of county areas, to the national economy, to public services and to social wellbeing.

CCN is the national voice for England's county councils. It represents all 23 county councils and 13 unitary authorities. Collectively, they represent 26 million people, or 47% of the country's population. It is a special interest group of the Local Government Association.

For more information visit www.countycouncilsnetwork.org.uk.

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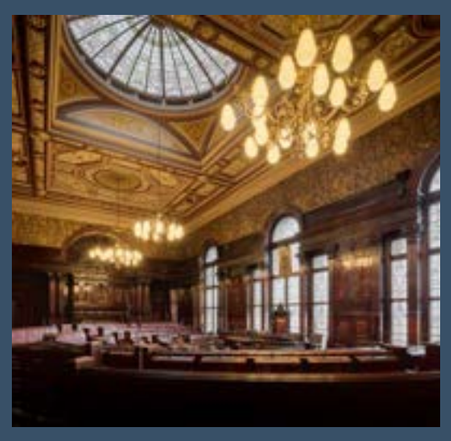
Executive Summary

For most people, over the last eighteen months school, leisure and keeping in touch with family and friends has only been possible online. Yet a significant minority of households and businesses in county areas do not have access to broadband speeds to do even the most basic of tasks effectively, leaving residents in county areas behind compared to their more urban neighbours.



Based on new analysis of broadband coverage in county areas, and extensive engagement with county and unitary authorities, this County All Party Parliamentary Group (APPG) inquiry report examines levels of digital connectivity in county areas compared to other parts of the country, the challenges faced in effectively rolling out faster speeds, and the impact on local residents and businesses. It concludes by making recommendations for how government can work with county and unitary authorities to improve digital connectivity.

Digital Connectivity in County Areas

New analysis by the County Councils Network (CCN) using Ofcom data shows that there are around 190,000 households and businesses currently in county areas unable to receive the most basic broadband speed of 10 megabits per second (mbit/s), almost treble the rest of England combined: connectivity black spots are increasingly a county issue, with rural areas particularly impacted.

County areas enjoy good coverage of what is considered to be ‘good broadband’ (superfast with speed of up to 30 mbit/s), with 94% of premises in counties having access to superfast broadband, compared to a national average of 96%.[1]

This has in part been the result of the good work carried out by county and unitary councils to ensure that their areas are able to access superfast broadband, and in particular their work in reaching the most remote communities and offering subsidies alongside the government to encourage providers.

However, some areas still struggle compared to other areas, with five county areas having less than 90% coverage.

[1] OFCOM (2021) *Connected Nations Spring 2021* https://www.ofcom.org.uk/__data/assets/pdf_file/0028/218881/Connected-Nations-Spring-Update-2021.pdf

Executive Summary

The government has an ambition to roll gigabit broadband out across the UK, which will provide a major step-change in the connectivity of homes and businesses. Under its 'Project Gigabit' agenda, the government aims to have 85% of the UK accessing gigabit speeds by 2025 - and 68% by the end of 2021. For county areas this provides a major opportunity to address the disparities that often exist within their areas, levelling up rural communities where residents have often struggled to access the same digital opportunities that exist in other parts of the country.

The Department for Digital, Culture, Media & Sport (DCMS) began its programme of rolling out gigabit broadband across England in 2019, and 40% of properties in the UK can now access this level of speed, according to Ofcom data. However, this growth is focussed, so far, on more urban areas. Only 21% of premises in county areas can access gigabit broadband at present, compared to 77% of London.

It is therefore recommended that the Department for Levelling-Up, Housing, and Communities engage with the local government sector to consider what regulatory or legislative changes need to be made to ensure that broadband connections are included as standard in new developments and that the network is future proofed.

The Impact on Residents and Business

Slow roll-out of gigabit broadband across county areas could impact not only on post-Covid recovery, but place them at an economic disadvantage in the longer term, given the anticipated shift towards more home or remote working.

Moreover, broadly the disparities in digital connectivity impacts on everyday life for residents in county areas, who are often not able to access the same technology and innovation which is available in other areas such as GP appointments, use of SMART meters, council and government services that have become digital by default, and the ability to keep in touch with friends and relatives with the resulting impacts on social isolation and mental wellbeing.

During the pandemic, it was good to see that many broadband providers stepped up to provide easy and free access for families struggling to access data for home-schooling, with the government continuing to signpost those in need.

However, the nature of the immediate challenge for digital access has changed significantly, with a 95% increase in the number of families receiving Universal Credit since March 2020. These families will similarly need assistance with the process of seeking and securing employment: as a result the government should consider how these digital needs could best be met.

Executive Summary

It is therefore recommended that the Department for Work and Pensions assess whether it is possible to put in place a scheme providing subsidised digital access for Universal Credit recipients, to assist them with job-hunting and to meet the obligations required of them.

There is a real risk that county areas become the poor relation to urban locations in terms of a gigabit broadband, as they were for years with superfast speeds. Therefore, the government must prioritise investment into these areas to help them catch up with gigabit rollout in other parts of the country and consider how funding and responsibilities can be devolved as part of the development of county devolution deals, currently being negotiated by county areas and government. It is therefore recommended that:

- with other parts of the country seeing a rapid increase in gigabit connectivity since 2019, government should now ramp up investment for county areas and prioritise those places so their gigabit accessibility rates can begin to catch up with the major cities and other parts of England.

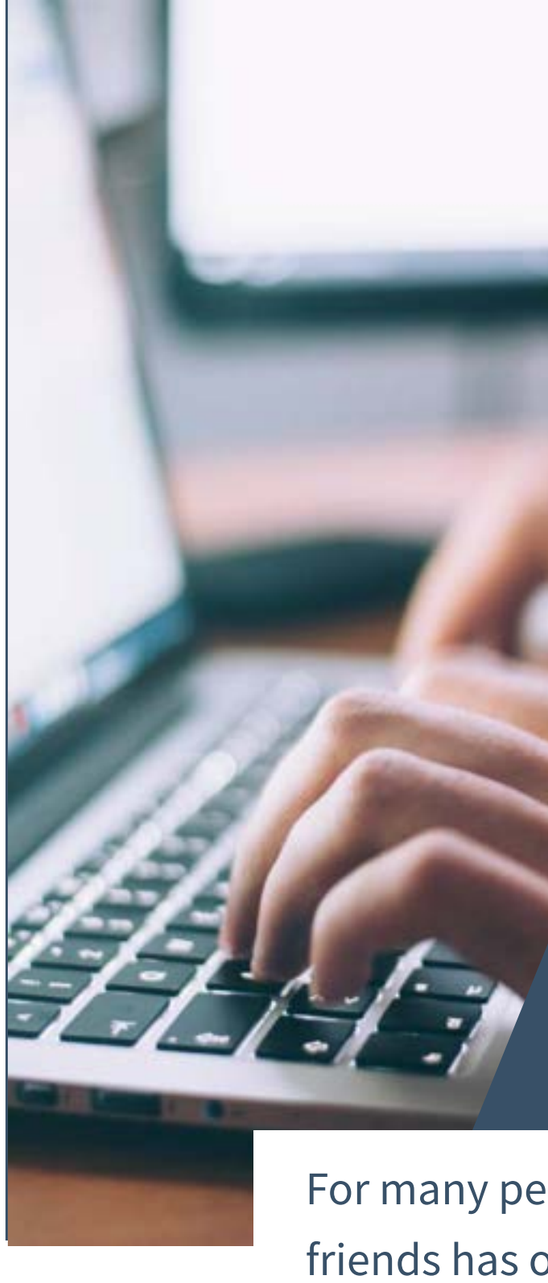
- BDUK continue to work closely with county and unitary councils in the delivery of Project Gigabit and prioritise rollout in county areas using existing local knowledge and expertise acquired from the national Better Broadband Programme.

- BDUK works to ensure its procurement processes are of sufficient scale for contracts to successfully meet the needs of the rural communities BDUK are aiming to support.

- as part of the forthcoming suite of powers available to county authorities in devolution deals, the devolution of local digital infrastructure budgets – including subsidies – to make them the responsibility of upper-tier councils should be available in every county deal, if the local authority wished to take on that responsibility.

- government should extend strategic planning powers to counties to join-up development with digital infrastructure provision that will meet residents' needs.

- the government considers what legislation it could put in place to secure access to land for the purpose of laying broadband cabling where the landowner is resistant.



1 Introduction

> *Improving digital connectivity is crucial for county economies, but also to ensure that residents in county areas do not miss out on opportunities that are open to people in other parts of the county who are better connected. This will be instrumental in ensuring that the country is 'levelled-up'.*

For many people during the pandemic, work, school, leisure and keeping in touch with family and friends has only been possible online. Changing working practices, with millions forced to work from home as a result of the pandemic has thrown issues around digital connectivity into greater relief. Looking forward beyond the pandemic, the importance of digital connectivity will only get starker in the coming years, given the irreversible nature of economic and social changes brought forth over the last eighteen months.

The government has recognised the benefits of securing better digital connectivity, using the 2020 National Infrastructure Strategy to reiterate its commitment to gigabit broadband.

Yet a significant minority of households and businesses in county areas do not have access to broadband speeds to do even the most basic of tasks effectively, leaving residents in county areas behind compared to their more urban neighbours.

Improving digital connectivity is therefore crucial for county economies, but also to ensure that residents in county areas do not miss out on opportunities that are open to people in other parts of the county who are better connected. This will be instrumental in ensuring that the country is 'levelled-up'. For their part, the this, the government has already committed to investing significant sums in an Outside In approach to connect hard to reach areas.

In recent years the County All Party Parliamentary Group (APPG) has worked to highlight areas of public policy where there needs to be a greater focus on services provided in county areas, which often lag behind those in more urban areas. This has included our reports on social mobility and county bus services.[2]

Given this, the APPG agreed to hold a short inquiry into securing digital connectivity in county areas. In February 2021 the APPG held a roundtable with representatives from county authorities exploring the topic in detail. In June, a further roundtable discussion was facilitated with the Minister for Digital Infrastructure, Matt Warman MP, the Executive Chair of Building Digital UK, Paul Norris, and councillors from county and unitary councils. This has been supported by new analysis from the County Councils

[2] County APPG (2018), *Social Mobility in Counties* http://www.countycouncilsnetwork.org.uk/download/1811/; County APPG (2020), *Reversing the Decline in Rural Buses* http://www.countycouncilsnetwork.org.uk/download/3294/

Network (CCN) of broadband coverage in county areas, and the wider impact on both residents and businesses.

This inquiry report starts by looking at the current levels of connectivity in county areas, exploring how they compare to other parts of the country for basic broadband speeds and superfast broadband.

Secondly, it looks at how the government is planning to roll out the new gigabit network and the support it is putting in place to secure this in the most difficult to reach areas, most of which are in county areas.

Third, we consider the impact of the current levels of access on residents and businesses. It explores a number of specific challenges, including support that people who are looking for employment may need to ensure that they can remain connected.

Finally, the report concludes by providing recommendations on how counties can secure the infrastructure needed to secure better digital connectivity, whether digital, 4G or 5G, and the changes that may be needed to the planning system to support this.

> ... the importance of digital connectivity will only get starker in the coming years, given the irreversible nature of economic and social changes brought forth by the pandemic.

Premises unable to reach 10 mbit/s - by council area

Area	Premises	Unable to reach 10 mbit/s	Percentage of total
County Councils Network councils	11,751,535	192,455	1.6%
London councils	3,902,630	14,842	0.4%
Metropolitan Borough councils	5,394,092	26,380	0.50%
Non-county unitary councils	4,353,195	32,486	0.7%

Premises with access to Gigabit speeds - by council area

Area	Premises	Access to Gigabit	Percentage of total
County Councils Network councils	11,751,535	2,453,432	21%
London councils	3,902,630	2,994,307	77%
Metropolitan Borough councils	5,394,092	2,775,067	51%
Non-county unitary councils	4,353,195	1,342,788	31%

Premises with access to Superfast speeds - by council area

Area	Premises	Access to Superfast	Percentage of total
County Councils Network councils	11,751,535	11,081,048	94%
London councils	3,902,630	3,754,952	96%
Metropolitan Borough councils	5,394,092	5,222,088	97%
Non-county unitary councils	4,353,195	4,199,840	96%

Figures are a CCN analysis of Ofcom data, available in Ofcom's Connected Nations - Summer Update 2021 report. The figures were compiled by Ofcom in May 2021, and the report was released in September 2021

2 Digital Connectivity in County Areas

> Improving digital connectivity is crucial for county economies ... to ensure that residents in county areas do not miss out on opportunities that are open to people in other parts of the county.

Long-standing issues with digital connectivity have come to greater prominence over the 18 months as a result of Covid-19. This has in part been a result of a significant increase in the number of people working from home and having to rely on their home internet connection instead of being able to physically access the office. Poor digital connectivity has also been a frequent and well-documented concern for those attempting to home school with children of all ages.[3]

Our inquiry starts by looking at why securing better digital connectivity is important to county areas. This includes new analysis of broadband speeds that currently exist in county areas compared to other parts of the country, and the anticipated impact of the government's ambitions to roll out gigabit broadband across the UK on county areas.

The Current Situation

For large parts of the pandemic, a large proportion of the country were only able to work and speak to loved ones online. Changing working practices as a result of the pandemic has given a greater urgency to this, which will only grow in the coming years given the irreversible nature of some of these changes.

Yet a significant minority of households and businesses in county areas do not have access to broadband speeds to do even the most basic of tasks effectively, leaving residents in county behind compared to their more urban neighbours.

The underlying levels of connectivity for county areas have been well documented: broadband speeds are, on the whole, slower than for the rest of the country. This has been acknowledged in the government's work on rural proofing, which works to ensure that policy makers assess and take into account the effects of policies on rural areas, and which said that:

[3] Office of the Children's Commissioner for England (2020), *Children without internet access during lockdown* https://www.childrenscommissioner.gov.uk/2020/08/18/children-without-internet-access-during-lockdown/

Box 1: County Economies

Counties account for 46% of England's population, 47% of its homes and 48% of its businesses, playing a key role in place-based growth through a number of different roles.

Despite this, a report by Grant Thornton for CCN published last year showed some of the significant challenges that county areas face considering the context of the government's levelling-up agenda.

Place-Based Recovery showed that some 30 of the 36 county authority areas have productivity levels below the England average, as well as slower business growth than the rest of the country: counties averaged 7.9% growth over the last five years, around half that of the rest of the country, which grew by 15.1% between 2014 to 2019.

The data also show that councils in London are able to spend over 50% more per person compared to counties (£506 compared to £333) on growth related services aimed at boosting local growth. The largest cities in England, the core cities, are able to invest 35% more than counties (£448 per person).

If counties are to boost our local economies, attract businesses, andareas encourage start-ups and business growth, increased investment in infrastructure across county areas, including digital infrastructure, will be vital.

Source: Grant Thornton (2020) Place-Based Recovery

'digital connectivity is essential to participation in modern life in the UK, as well as being a critical enabler of successful businesses. However, there are clear disparities in broadband and mobile coverage between urban and rural areas in England.'[4]

Improving digital connectivity is therefore crucial for county economies, but also to ensure that residents in county areas do not miss out on opportunities that are open to people in other parts of the county who are better connected. Resolving these issues will be crucial in making sure differences in local economy, opportunity and community are reduced as part of the broader agenda to levelling-up the country.

Basic Speeds

In the most extreme cases for some county businesses and households, speeds do not even match 10 megabits per second (mbit/s), considered to be the speed needed to carry out the most basic online tasks.

The consumer advisory group Which? points out that 'a 10-11mbit/s connection will take more than five minutes to download one episode of a TV show, while faster connections can take seconds.'[5]

New analysis by CCN using Ofcom data shows that there are around 190,000 households in county areas unable to receive 10 mbit/s, treble the rest of England combined and showing that these connectivity black spots are increasingly a county issue, with rural areas particularly impacted. In Devon, for example, 5.8% of premises are unable to access 10 mbit/s, and it is also high for areas like Herefordshire (4.7%) and Somerset (3.6%).[6]

By contrast, less than 0.3% houses in London are unable to access 10 mbit/s, with just 30 properties in Lambeth in this position, and just 0.5% of premises in areas served by metropolitan borough councils.

[4] Department for Environment, Food and Rural Affairs (2021), *Rural Proofing in England in 2020* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/973842/rural-proofing-report-2020.pdf
[5] Which? (January 2021) *What broadband speed do I need?* https://www.which.co.uk/reviews/broadband-deals/article/what-broadband-speed-do-i-need-aRxZX0q3jekp
[6] OFCOM (2021) *Connected Nations Summer 2021* *https://www.ofcom.org.uk/research-and-data/multi-sector-research/infrastructure-research/connected-nations-update-summer-2021*

The impact that poor broadband has had on communities contributed to a change in law in March 2020, with the establishment of a Universal Service Obligation for broadband.[7] This means that those with speeds under 10 mbit/s are now able to request subsidised work to improve their accessibility to higher speeds. Whilst it is hoped this means that access to this minimum speed will be dramatically improved in the coming years, this still places an onus on businesses and individuals to address this themselves. There are also concerns the subsidy scheme may not be sufficient to address this completely as currently set up.

County areas enjoy significant coverage of what is considered to be 'good broadband' (superfast with speed of up to 30 mbit/s – see Box 2 below), with 94% of premises in counties having access to superfast broadband, compared to a national average of 96%.[8] This has in part been the result of the good work carried out by county and unitary councils to ensure that their areas are able to access superfast broadband, and in particular their work in reaching the most remote communities and offering subsidies alongside the government to encourage providers. However, five county areas still have less than 90% coverage.

Whilst some of the work to secure greater coverage of superfast broadband will be overtaken by the focus on gigabit broadband (see below), a continued focus on securing better rollout of superfast broadband in the interim would benefit county areas.

Gigabit Ambitions

The Government's National Infrastructure Strategy published in November 2020 states an ambition for 85% of the UK to be able to access gigabit broadband by 2025.[9] If achieved, this will mean that the vast majority of homes and businesses in England are able to access speeds of up to 1,000mbit/s, providing the potential for a significant transformation in capabilities for households and businesses, and helping to secure post-Covid-19 recovery over the coming years.

The DCMS began its programme of rolling out gigabit broadband across England in 2019, and 40% of premises in England can now access this level of speed.

However this growth has been focussed on more urban areas. Only 21% of county areas can access gigabit broadband at present, with ten county areas having coverage of less than 15%. Only two have coverage greater than the UK average of 40%.

This is significantly less than the gigabit coverage at the moment which spans 77% of properties in London and half of premises served by metropolitan borough councils in the North and West Midlands. Indeed, over the past year coverage in London has more than tripled in the past couple of years.

[7] OFCOM, *Your right to request a decent broadband service: What you need to know* https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/broadband-uso-need-to-know
[8] OFCOM (May 2021) *Connected Nations Summer Update* *https://www.ofcom.org.uk/research-and-data/multi-sector-research/infrastructure-research/connected-nations-update-summer-2021*
[9] HM Treasury (2020), *National Infrastructure Strategy* *https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/938539/NIS_Report_Web_Accessible.pdf*

> *[gigabit] ... will pave the way for new and unexpected social benefits alongside jobs and economic growth, and revolutionise rural communities by giving people the freedom to live and work more flexibly*
>
> Department of Digital, Culture, Media and Sport

The downscaling of the government's ambition from an original 100% target to 85% coverage could mean county areas are de-prioritised as part of this roll out. This could impact on the post-Covid-19 recovery – as Grant Thornton's report into Place Based Recovery noted, 'the current crisis has highlighted just how important digital connectivity is to our lives and livelihood and will play a major part in a place's recovery and economic resilience.'[10]

More crucially, a divergence in access to gigabit broadband has the potential to place county areas at a longer-term disadvantage compared to their more urban neighbours. As DCMS acknowledge:

'[gigabit] connections will not only underpin the use of smarter devices such as intelligent heating systems and internet-connected fridges, but they will allow people to download HD movies in seconds and stream TV and gaming content at 4K picture quality on multiple devices at the same time.

'The speeds will pave the way for new and unexpected social benefits alongside jobs and economic growth, and revolutionise rural communities by giving people the freedom to live and work more flexibly.'[11]

Securing improvements to digital connectivity is of upmost importance to ensure that county areas have the same access that is provided elsewhere, enabling them to keep up with, and take advantage, of the opportunities that an enhanced digital infrastructure could bring.

There is therefore a real risk that county areas become the poor relation to urban locations in terms of a gigabit broadband, as they were for years with superfast speeds. To prevent this situation developing, the government must prioritise investment into these areas to help them catch up with gigabit rollout in other parts of the country.

[10] Grant Thornton (July 2020), *Place Based Recovery* http://www.countycouncilsnetwork.org.uk/download/3114/
[11] DCMS (August 2020), *Gigabit broadband rollout milestone reached* https://www.gov.uk/government/news/gigabit-broadband-rollout-milestone-reached

CCN member speeds and connectivity - by council

Area	Access to Gigabit	Access to Superfast	Unable to reach 10 mbit/s
Buckinghamshire	22.4%	94.5%	1.5%
Cambridgeshire	20.6%	96%	1%
Central Bedfordshire	18.4%	97%	1%
Cheshire East	22%	94%	1.5%
Cornwall	31%	87%	2.3%
Cumbria	93%	5.4%	2.5%
Derbyshire	21.5%	94.8%	0.9%
Devon	26%	86.5%	5.8%
Dorset	10.6%	93.4%	1.3%
Durham	19.7%	94.1%	1.5%
East Sussex	20.3%	96.4%	0.6%
East Riding of Yorkshire	62.8%	95.8%	1.4%
Essex	25.7%	95.8%	1.1%
Gloucestershire	18.4%	92.7%	2.1%
Hampshire	16.5%	95.3%	1.1%
Herefordshire	20.1%	88.4%	4.7%
Hertfordshire	12%	97.2%	0.5%
Kent	26.3%	94%	1.6%
Lancashire	22.7%	96%	08.%
Lincolnshire	7.10%	91.3%	3.1%
Norfolk	9.6%	93.3%	1.9%

Figures are a CCN analysis of Ofcom data, available in Ofcom's Connected Nations - Summer Update 2021 report.
The figures were compiled by Ofcom in May 2021, and the report was released in September 2021.

CCN member speeds and connectivity - by council

Area	Access to Gigabit	Access to Superfast	Unable to reach 10 mbit/s
North Northamptonshire	16.3%	97.1%	1.1%
North Yorkshire	12.5%	90.7%	3.7%
Northumberland	6.4%	93%	2.5%
Nottinghamshire	16.1%	97.3%	0.7%
Oxfordshire	16.9%	97%	0.6%
Shropshire	10%	86.8%	5.6%
Somerset	14.2%	89.2%	3.6%
Staffordshire	30.6%	95%	1.3%
Suffolk	15%	95.3%	0.8%
Surrey	14.4%	96.6%	0.5%
Warwickshire	58.5%	96.6%	1.1%
West Northamptonshire	30.6%	96%	1.3%
West Sussex	18.3%	95.1%	1%
Wiltshire	24.2%	95%	1.3%
Worcestershire	35.4%	95.7%	1%
CCN average	20.8%	94.3%	1.6%

Figures are a CCN analysis of Ofcom data, available in Ofcom's Connected Nations - Summer Update 2021 report.

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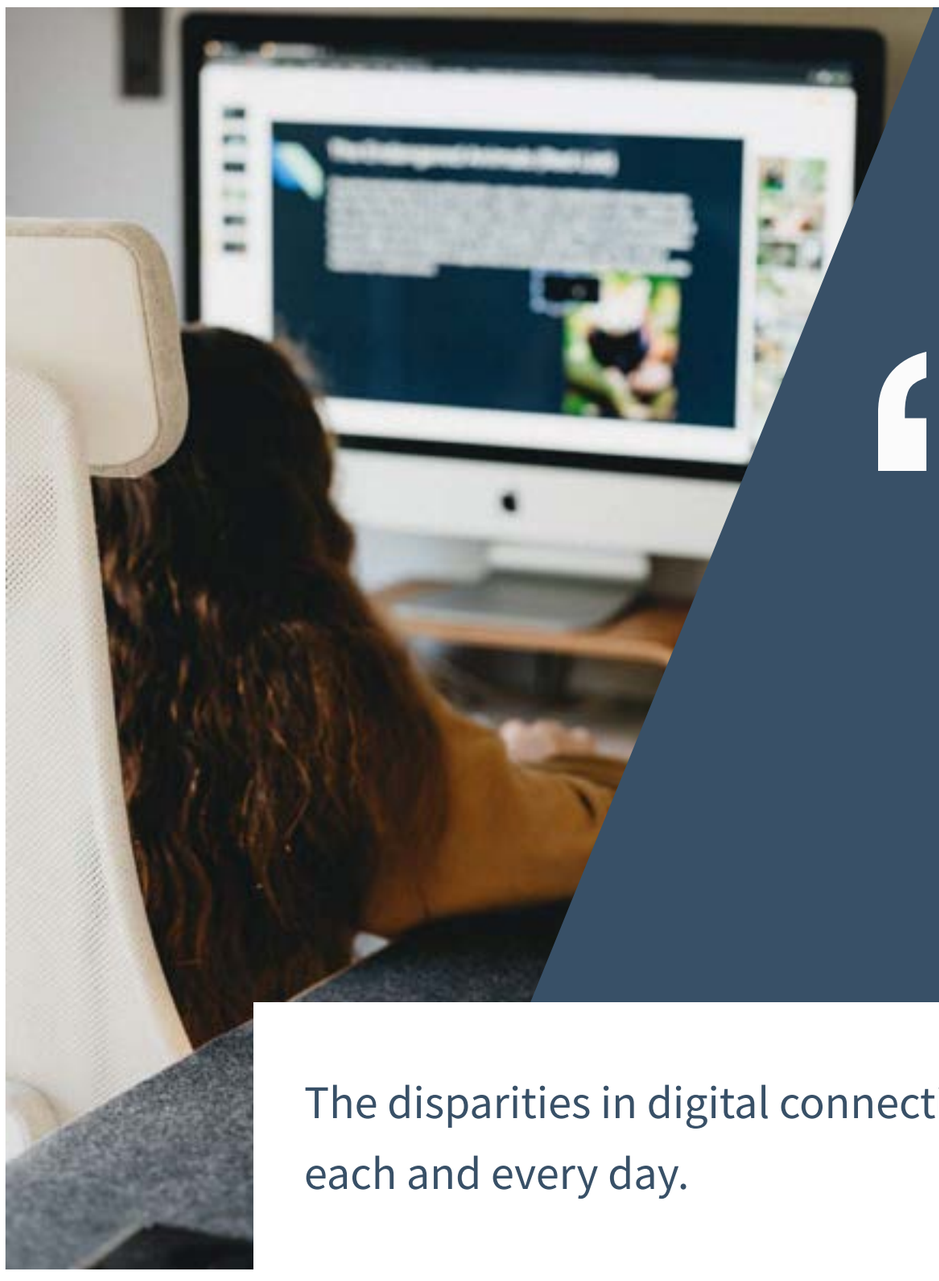

3 The impact on residents and businesses

> Residents and businesses in county areas would benefit from a levelling-up of digital connectivity. This will help to reduce the economic disparities between different parts of the country and also open up more opportunities for personal opportunity.

The disparities in digital connectivity highlighted in the previous section impact on our residents' lives each and every day.

This is in part acknowledged by the government, who measure digital connectivity as part of the rural-proofing reporting inaugurated in 2020.[12] As a result residents and businesses in county areas would benefit from a levelling-up of digital connectivity. This will help to reduce the economic disparities between different parts of the country and also open up more opportunities for personal opportunity, community regeneration and access to services.

This section of the report outlines how the lack of connectivity impacts on day-to-day life for those in rural and county areas, and not just in terms of the home-working or schooling that has been in sharp focus during the pandemic.

Home Life

A lack of access to reliable or fast broadband could limit access to the same technology and innovation as urban areas, such as GP appointments, use of SMART meters, council and government services that have become digital by default, and the ability to keep in touch with friends and relatives with the resulting impacts on social isolation and mental wellbeing. For those on isolated farms, completing applications for the subsidies that many rely on to remain viable can only be done with access to a proper internet connection.

This could have a significant impact in the long-term, particularly the ability of county authorities to create the conditions for better social mobility for their residents, which the County APPG looked at in a previous report.[13]

Ultimately, digital connectivity is so integrated into everyday life that many people regard proper access to broadband as a utility akin to water or electricity. The government has recognised this through the creation of a Universal Service Obligation. Meeting this obligation would be assisted if sufficiently fast

[12] Department for Environment, Food and Rural Affairs (2021), *Rural Proofing in England in 2020* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/973842/rural-proofing-report-2020.pdf
[13] County APPG (2018), *Social Mobility in County Areas* *http://www.countycouncilsnetwork.org.uk/download/1811/*

broadband were included as standard in new developments.

The increase in home-working is here to stay following the pandemic, which saw businesses successfully adapting to a situation where all, or most, of their employees were working remotely. The Office of National Statistics has found that the proportion of working adults who did any work from home in 2020 increased to 37% on average from 27% in 2019 as a result of the government's advice to work from home where possible.[14]

The ONS research also showed that whilst the proportion of those home working has reduced since restrictions started to be lifted in March, 24% of businesses said that they intend to use increased homeworking as a permanent business model going forward. It is also worth noting that of those currently homeworking 85% expected to share their time between their usual place of work and remote working in the future. This is likely to translate into a significant shift towards flexibilities around working from home in the future. However, this will only be possible if employees have access to a speedy and reliable broadband connection.

Greater thought also needs to be given to how future upgrades to the network could be secured as technology changes given the difficulties that the government has had in ensuring that existing premises can secure a good broadband connection.

For example, councils such as Kent and Cambridgeshire are working on a 'dig once' programme, to ensure that every time a road is dug up, broadband ducting is put in, which would make the work of suppliers easier.

Affordability and Assisting Job-Seekers

The issues that have been thrown up during the pandemic to date are not just connected to physical access to broadband, but also to the ability to afford it. Since the start of the pandemic, one of the best illustrations of the impact of digital connectivity has been home schooling. These have been well-documented by the media, campaigners and parliamentarians over the past year, with Ofcom research suggesting that 880,000 children live in a household with internet access only via mobile phone.[15]

Solutions to this were provided through two routes – permitting children with poor digital access to return to school prior to other children, and through schemes that extended free broadband services to children to enable them to learn remotely.[16]

However, it is not only schooling that has been impacted: also affected were those who lost their employment as a result of the pandemic.

Addressing this will be vital for the country's economic recovery, with many businesses facing the long-term challenges due to the pandemic and those currently on furlough may find themselves with no job to go back to once the scheme ends in October. Re-skilling people will therefore be of huge importance to ensure they can do the jobs of tomorrow, and a fast and reliable broadband connection will be crucial to the fortunes of these individuals.

[14] Office of National Statistics (2021), *Business and individual attitudes towards the future of homeworking, UK: April to May 2021*
https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/businessandindividualattitudestowardsthefutureofhomeworkinguk/apriltomay2021#future-remote-working-practices
[15] Which? (2021) *Free mobile data for schoolchildren: find out what help is available*
https://www.which.co.uk/news/2021/01/free-mobile-data-for-schoolchildren-do-i-qualify/
[16] https://get-help-with-tech.education.gov.uk/internet-access

Box 3: The Impact of the Pandemic on Employment

Analysis published by the CCN in May 2021 looked at how county economies had been impacted by the pandemic. It found that:

- economic output, as measured by Gross Value Added (GVA), has declined by £58bn in county areas since the start of the outbreak.
- the number of people claiming out of work benefits in the 36 county areas the CCN represents has risen by 421,365 people to 762,430 - a 123% increase. In comparison, the rise in 36 metropolitan boroughs in Northern and West Midlands towns and cities totals 282,235 – an 88% rise.
- The number of people claiming Universal Credit in the 36 counties in CCN membership rose from 918,437 in March 2020 to 1,798,405 in September 2021 - a 95% increase.
- there are 5.7m people in county areas who are working in employment deemed at risk of widespread closures, such as leisure, manufacturing, and hospitality – 53% of the entire workforce.

Source: County Councils Network (2021)

As shown in CCN's recent analysis (see box 3 above) between the first lockdown in March 2020 and January 2021, the number of those claiming out work benefits within counties had increased by 123%.[17] Whilst it is hoped that as many of these people find rapid employment as possible, for a significant number being able to do so will require a good broadband connection.

This is to enable people to search job-adverts, fill out application forms or submit CVs: activities that are increasingly carried out on-line. During the pandemic there has also been a strong chance that job interviews were conducted online.
As with home-schooling, it will not be enough for those seeking employment to rely on mobile phone data; few people would be confident that conducting a job interview over a mobile phone would allow them to project the image that they would want to prospective employers

At a time when household finances are being squeezed, the publicly-available alternatives that people would have relied on, such as the library network may not be suitable for the full-range of uses that they need it for, such as job interviews.

During the pandemic, it was encouraging to see that many broadband providers stepped up to provide easy and free access for families struggling to access data for home-schooling. These families will similarly need assistance with the process of seeking and securing employment and the government should consider how their needs could best be met.

[17] County Councils Network (2021), *CCN launches new economic recovery campaign as research shows the unemployment impact of the pandemic on rural areas* https://www.countycouncilsnetwork.org.uk/ccn-launches-new-economic-recovery-campaign-as-research-shows-the-unemployment-impact-of-the-pandemic-on-rural-areas/

3 Infrastructure Roll-Out

> The rural nature of many county areas means that the number of premises requiring subsidy or support to secure gigabit broadband access is likely to be significantly higher than in other parts of the country.

Securing better broadband access for rural communities will require more investment and planning than exists in urban areas, and this section of the report looks at the forms that that could take.

As the government's Rural Proofing in England report stated:

'Lower population densities, difficult topology, larger areas to cover, and greater exposure to adverse weather conditions can all make it harder for commercial operators to deliver reliable, affordable communications services to rural areas.'[18]

Counties and unitary councils are already working to overcome these issues through innovative and creative solutions, putting in place better broadband programmes, local full-fibre network projects, addressing digital inclusion and securing low powered battery networks.

The government has also put in place measures to support the roll out of digital infrastructure to county areas. The government's ambitions in this regard was restated in last year's National Infrastructure Strategy, with an aim to secure 85% gigabit speed coverage by 2025.[19]

This strategy envisages that 80% of the UK's gigabit speed rollout would be delivered by the private sector, and as it acknowledges: 'around 20% of premises in the UK are expected to be uncommercial: the costs of connecting these premises outweigh the returns a company could make.'

The rural nature of many county areas means that the number of premises requiring subsidy or support to secure gigabit broadband access is likely to be significantly higher than in other parts of the country. For example, in Suffolk the county council has estimated that 60% of premises can be connected commercially, with 40% dependent on public subsidy. Given this, the £5bn of investment that the government has said it will provide in public funding for connection is to be welcomed, as is the 'Outside In' approach which will see the properties that are most difficult to connect tackled first.

To facilitate this support, DCMS created a Building Digital UK (BDUK) programme in 2010, which seeks to

[18] Department for Environment, Food and Rural Affairs (2021), *Rural Proofing in England in 2020* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/973842/rural-proofing-report-2020.pdf
[19] HM Treasury (2020), *National Infrastructure Strategy* *https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/938539/NIS_Report_Web_Accessible.pdf*

improve digital infrastructure through a number of avenues. Recent work included the £1.7bn Superfast Broadband Programme, the Local Full Fibre Networks Programme, voucher programmes and the Rural Gigabit Connectivity Programme. Here, councils have worked with BDUK to translate this funding into action on the ground, and have match funded subsidies in some areas so more households and businesses can access them.

The recent announcement of the first phase of the £5bn 'Project Gigabit', which will see more than one million hard to reach homes and businesses connected to next generation gigabit broadband, is to be welcomed. This focuses investment in county areas such as Cambridgeshire, Cornwall, Cumbria, Dorset, Durham, Essex, and Northumberland, amounting to a quarter of the premises that will need public subsidy.[20] In August, the government said a further 1.8m rural properties would be connected with gigabit broadband, across 26 counties. [21]

Despite this, there are concerns about at the speed with which the overall work will need to be undertaken for the government to hit its stated ambition. It may be that the Treasury needs to be flexible about the period over which the £5bn can be invested given that only £1.2bn has been committed to date.[22]

County and unitary councils and DCMS have worked well in partnership over a number of years on the national Better Broadband Programme. As part of this county and unitary councils have performed effectively the roles of 'local bodies', leading on Open Market Review, State Aid consultation, procurement, contract management and local problem-solving and communication, all within the framework set out by BDUK. This has worked well and seen the improvement of speeds and coverage in recent years.

Project Gigabit, envisages a different relationship with a more centralised model in terms of procurement and contract management. It is essential that the partnership ethos which has been established continues into Project Gigabit and that the local knowledge, expertise and understanding of places is build into the local procurements and projects. County Councils will be instrumental in being able to unblock local issues, for example with landowners, and have built effective partnerships with providers through experience on highways network management and road closures. This has led to much innovation in terms of the delivery of the superfast programme and should continue under Project Gigabit.

As a result, BDUK will want to continue to recognise this role and continue to work with local authorities as key strategic partners.

In this spirit, during the evidence session the APPG held, county and unitary councils voiced the view that one area where BDUK's activity could be improved was the scale of contracts that are issued.

BDUK does not work directly to install broadband, but issues procurement tenders for the work that is to be carried out. Attendees at our roundtable were concerned that the size of procurement contracts are not at sufficient scale. This will limit the economies of scale that could be realised through the procurement process, and potentially deter large and small companies from tendering for this work. This has the potential to delay work to connect the most difficult to reach properties, leaving areas waiting for longer for gigabit broadband contrary to the aims of the 'Outside-In' approach.

[20] Department for Digital, Culture, Media & Sport (2021), *Government launches new £5bn 'Project Gigabit'* https://www.gov.uk/government/news/government-launches-new-5bn-project-gigabit
[21] Department for Digital, Culture, Media & Sport (2021), *'Two million rural homes and businesses to benefit'* https://www.gov.uk/government/news/two-million-rural-homes-and-businesses-to-benefit-in-5-billion-broadband-upgrade
[22] https://www.gov.uk/guidance/building-digital-uk
[23] Spending Review 2020

Roll Out Of Gigabit Broadband

BDUK will also want to work with commercial partners to ensure that they remain committed to commercial roll out of gigabit broadband so soon after completing a superfast broadband network in many areas.

One way that BDUK has sought to ensure faster roll out of broadband, is through voucher schemes. These variously support community-led broadband projects, and provide private businesses and individuals with a chance to access superfast and gigabit broadband.

This is a well-meaning approach that seeks to identify gaps in provision and empower individuals and communities to overcome the infrastructure issues. However, there is the potential for these schemes to be overwhelmed, and BDUK should retain a strategic approach to ensuring faster rollout of digital infrastructure.

The concept of devolution for county areas has been renewed by this government, with a speech by the Prime Minister in July committing to devolving powers to county areas, as presently just three counties have secured a deal in prior years. As part of the development of county deals, the government should consider devolving broadband budgets – particularly BDUK's voucher scheme – to upper-tier county authorities. They are best placed to pinpoint local coverage gaps, manage local demand for such subsidies, and use their local knowledge to provide the solutions needed to improve coverage.

As mentioned previously, improving digital connectivity will be key to securing the post-pandemic economic recovery, which is why the devolution of broadband budgets, where desired, could have a material impact. Given the important role of local government in securing improved post-pandemic growth, that there are a number of steps the government could take which would help to secure faster improvements in digital connectivity.

The government's Superfast Broadband Programme saw BDUK provide a national procurement framework, which local authorities worked within to manage contracts with suppliers locally. This shows that councils can deliver improvements in broadband infrastructure and that they should be entrusted to do so again.

This would allow upper-tier councils to use their local knowledge to drive improvements forward, and we note that some are making a request for this to happen as part of the county bids that they have made to the Department for Levelling Up, Housing, and Communities. Furthermore, councils should also be able to use the UK Shared Prosperity Fund to facilitate improved roll out of digital infrastructure when details are published later this year.

The APPG were told about long-standing concerns about how the planning system can work against improvements in digital connectivity.

When broadband cabling is being installed, landowners have the right to not allow access across their land, so preventing broadband from being installed. This will of course have a disproportionate impact on rural communities, as there is often no other way of accessing broadband cabling other than going through farm or privately owned land.

The Government should therefore seek to assess not only the scale of this problem, but how it will impact on their planned broadband roll out. Whilst the government's Telecommunications Infrastructure (Leasehold Property) Bill addresses issues around those in properties where they do not own the freehold, the government should consider including provisions in the Planning Bill that ensure a similar right exists for those in properties whose access is held up by landowners in the surrounding area.

Box 4: What Is Strategic Planning?

Strategic planning offers the opportunity to bring local leaders together to ‘zoom out’, typically across county geographies, and assess the infrastructure and economic need of a whole area. This provides the impetus to unlock growth by creating an all-encompassing vision for an area, and an agreed framework under which local plans would be prepared.

This would mean that there is less chance of Local Plans being delayed: as it would be harder to hold-up a plan that has been produced within a framework as a result of a shared vision for an area; reducing the risk of areas being at the mercy of unsuitable development.

These proposals would allow for a new collaborative approach between councils and partners that would allow them to plan strategically over a wider scale, encompassing infrastructure and other considerations.

The APPG also heard concerns about the impact local government arrangements can have, which sees a split between tiers of local government for planning and infrastructure: in two-tier local authority areas district councils are responsible for housing and planning, and county councils are responsible for infrastructure. This split provides an additional layer of complexity that those seeking to take forward broadband schemes must engage with.

In recent months, the CCN has published proposals that would see strategic planning powers re-introduced in two tier areas, to provide a more joined-up approach to planning and infrastructure. This would see Strategic Planning Advisory Bodies created, which would comprise all council leaders, plus business, health, and education stakeholders from an area who would collaborate and set out ambitious visions for their areas, with these bodies providing a forum that bridges national and local policies.[24]

Doing this would assist with planning for digital infrastructure, both where it needs to be improved or provided to connect existing properties to broadband, but also to ensure that new developments are appropriately provided for. It would also allow local authorities to prioritise digital infrastructure and work in partnership with digital infrastructure providers helping to ensure that their current and future needs are met.

[24] Catriona Riddell Associates (2020) *Planning Reforms and the Role of Strategic Planning* http://www.countycouncilsnetwork.org.uk/download/3224/

The Role Of Masts

A potential part of the solution for securing better digital connectivity is through the development of an improved wireless network and better access to 4G and 5G in county areas. Rural areas have historically suffered from poorer access to mobile or wireless connections as a result of a less dense network of masts compared to more urban areas. The Government has worked to improve the 4G network through the Shared Rural Network, a £1 billion mobile connectivity programme agreed between the country's main mobile operators and the UK government to improve mobile connectivity in rural areas. This should improve access to 4G coverage, with particular improvements in the North East and Yorkshire.[25]

The Government has also recently consulted on the creation of permitted development rights for electronic communications infrastructure, which could extend permitted development rights to increase the height of new and existing masts by 20%.[26]

Councils will want to be sure that extending permitted development rights in this way does not adversely impact on the local environment, or on the wider roll out of digital infrastructure improvement programmes. They stand to benefit from work to remove barriers to the rapid deployment of 5G technology, which will be an important future resource for helping achieve better digital connectivity in county areas.

There should also be a more measured approach to the changes in National Parks, Conservation Areas, and Areas of Outstanding Natural Beauty, which feature heavily in many county areas. The consultation says it would work with bodies including representatives of local planning authorities for the development of guidelines. County and unitary authorities are willing and ready to engage on forthcoming guidance given the potential benefits that could be made to local digital infrastructure.

Finally, there is the potential for wireless to 'provide the final 1%' in ensuring that properties are properly connected. Whilst this technology can be expensive, county authorities and DCMS will want to closely monitor emerging technologies to see how much this provides part of the solution in the coming years.

[25] DCMS (2021), *Mobile connectivity revolution to boost the Union* https://www.gov.uk/government/news/mobile-connectivity-revolution-to-boost-the-union
[26] MHCLG (2021), *Changes to permitted development rights for electronic communications infrastructure: technical consultation* https://www.gov.uk/government/consultations/changes-to-permitted-development-rights-for-electronic-communications-infrastructure-technical-consultation

Conclusions and Recommendations

Levelling-up digital connectivity is of the upmost importance to ensure that county areas have the same access that is provided elsewhere, enabling them to keep up with and take advantage of the economic and social opportunities that an enhanced digital infrastructure could bring.

For their own part, local authorities in these areas will want to work to ensure that roll out happens in a timely and appropriate manner, and also ensure that their local knowledge is utilised in addressing any issues that may occur. DCMS will continue to recognise this role and work with local authorities as key strategic partners.

The Government may also want to consider how changes to the planning system could lead to improvements, with an opportunity for spatial planning to provide greater coordination of infrastructure development, and the extent to which landowners' rights prevents laying of broadband cabling.

Given the important role of local government in securing improved post-pandemic growth, there are a number of steps the government could take which would help to secure faster improvements in digital connectivity, including considering devolving responsibility for budgets as part of the government's programme of devolution.

It is therefore recommended that:

1. with other parts of the country seeing a rapid increase in gigabit connectivity since 2019, government should now ramp up investment for county areas, and and prioritise those places so their gigabit accessibility rates can begin to catch up with the major cities and other parts of England.

2. the Ministry of Housing, Communities and Local Government (MHCLG) engage with the local government sector to consider what regulatory or legislative changes need to be made to ensure that broadband connections are included as standard in new developments and that the network is future proofed.

3. the Department for Work and Pensions assess whether it is possible to put in place a scheme providing subsidised digital access for Universal Credit recipients, to assist them with job-hunting and to meet the obligations required of them.

4. BDUK continue to work closely with county and unitary councils in the delivery of Project Gigabit and prioritise rollout in county areas using existing knowledge and expertise acquired from the national Better Broadband Programme

5. BDUK works to ensure its procurement processes are of sufficient scale for contracts to successfully meet the needs of the rural communities BDUK are aiming to support.

6. as part of the forthcoming suite of powers available to county authorities in devolution deals, the devolution of local digital infrastructure budgets – including subsidies – to make them the responsibility of upper-tier councils should be available in every devolution deal, if the local authority wished to take on that responsibility.

7. government should extend strategic planning powers to counties to join-up development with digital infrastructure provision that will meet residents' needs.

8. the government considers what legislation it could put in place to secure access to land for the purpose of laying broadband cabling where the landowner is resistant.