

# Metrics for the UK independent network sector

Including results from  
Spring 2022 survey





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# Foreword



**The latest in our series of reports with Point Topic shows continuing strong growth in the independent digital infrastructure sector. The 'AltNets' have more than doubled their footprint year on year since 2019, now reaching 5.5m premises and expected to reach 11.5m premises by the end of this year. Investment remains buoyant with an additional £5.7bn committed during 2021 bringing total estimated investment in the independent sector to £17.7bn for the period to 2025.**

These are young, ambitious companies providing the competitive spur crucial for the government to reach its ambitious targets for Gigabit-capable networks throughout the UK. INCA's members are building across all geo-types from densely populated urban areas, through market towns and into sparse rural areas. Big plans are being turned into live networks benefitting our communities and businesses across the country.

Government and regulatory policy supports infrastructure competition – a choice of networks for consumers and businesses. Aggregating the plans of BT, Virgin Media and the AltNets means that this looks increasingly likely for many of our citizens over the coming years.

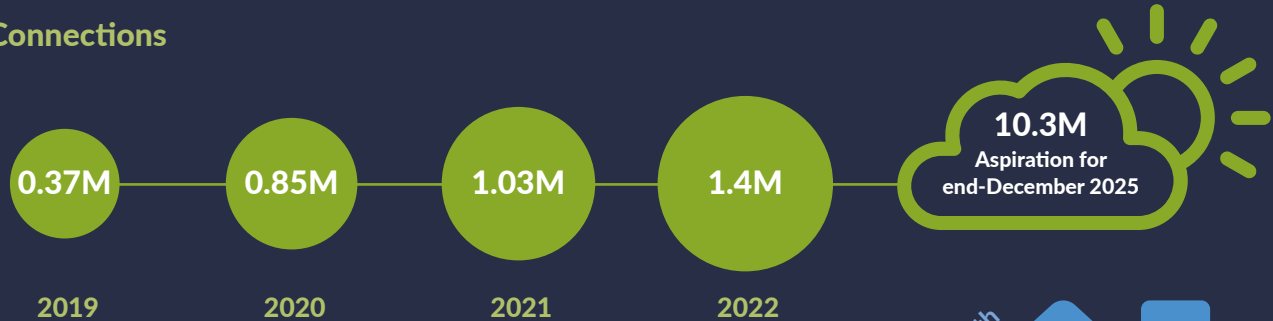
Obviously there are challenges, many of which are noted in the report, but overall, this is an exciting time as we move decisively from fund-raising and planning, to execution and delivery. We are replacing the 100-year-old phone network with the fibre networks capable of meeting the UK's needs for the 21st century.

**Alex Blowers** – Chair INCA

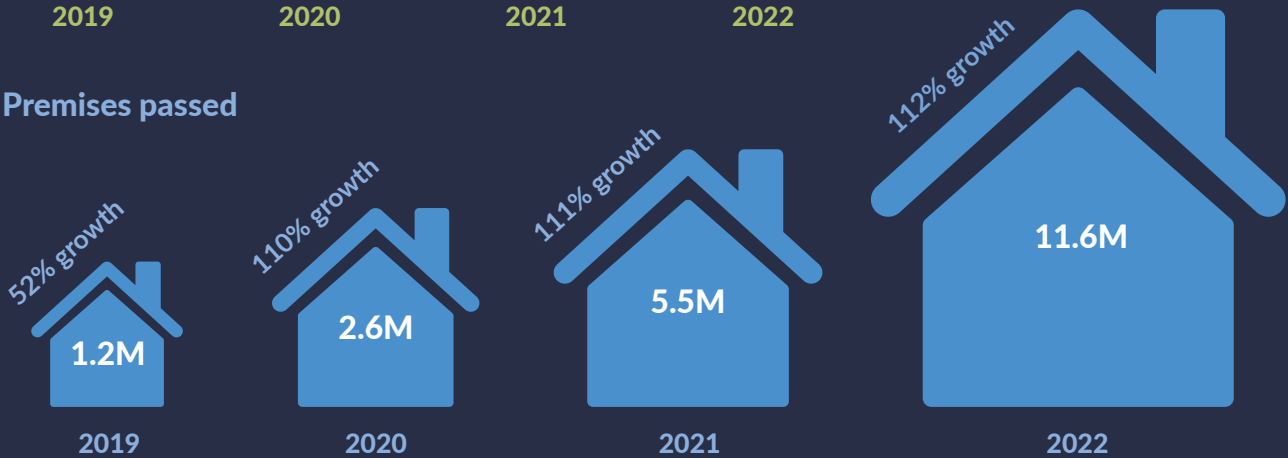
# 1. Key metrics

## The Pace and Scale of AltNet Deployment

### Connections



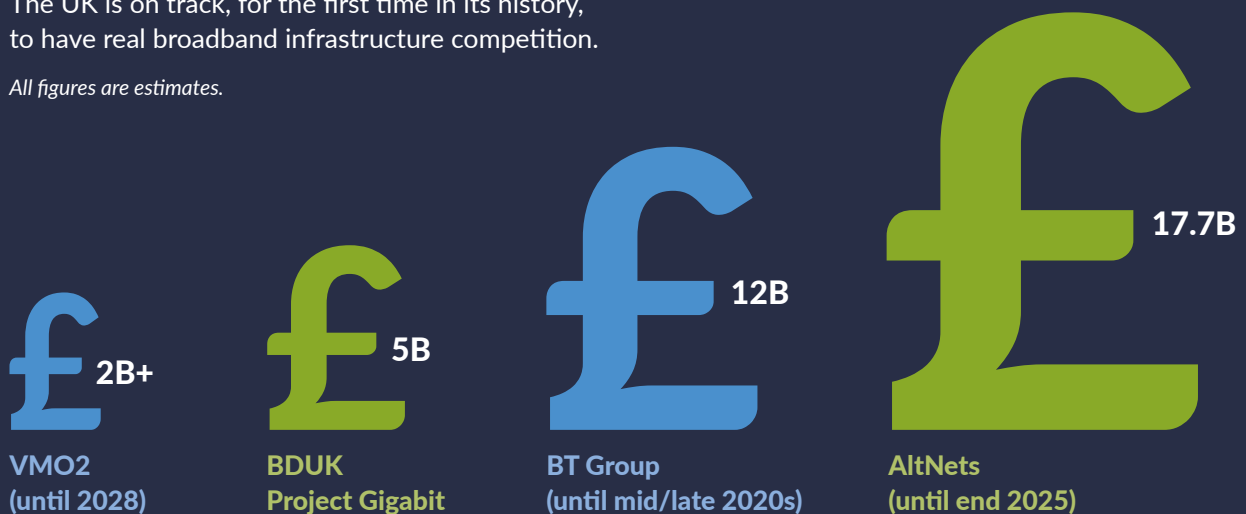
### Premises passed



## Estimated Full Fibre Investment

The UK is on track, for the first time in its history, to have real broadband infrastructure competition.

*All figures are estimates.*



## 2. Summary

### Premises passed

- The UK's independent operators<sup>1</sup> are estimated to have passed 5.5 million premises with fibre broadband networks at end-2021.<sup>2</sup>
- This represents 111% growth year-on-year, compared with 110% from 2019–2020 and 52% from 2018–2019.
- The majority use gigabit fibre-to-the-premises or home (FTTP/H) and fibre-to-the-building (FTTB) technology with some legacy VDSL increasingly being phased out.
- CityFibre alone account for over 1 million of the premises passed by independent networks today according to the data that thinkbroadband<sup>3</sup> and Point Topic collate. As CityFibre move up the ranks in terms of FTTP infrastructure providers they are moving into the realms of a true national network. Community Fibre has passed half a million homes in London, WightFibre has established itself as the main full fibre provider on the Isle of Wight and INCA members are building full fibre networks across all parts of the UK.
- Fixed wireless access (FWA) networks are estimated to cover more than two million premises<sup>4</sup> although not all will have full speed service available.

### Live connections

- There are 1.03 million live connections to independent fixed networks primarily provided by full fibre and gigabit connections, already representing a 20% take-up rate in an expanding footprint demonstrating that residential consumers in particular demand better bandwidth, symmetry, and stability.

### Expectations and aspirations

- Fixed full fibre network infrastructure supplied by independent operators is expected to reach over 11.5 million premises at the end of 2022 with an estimated 1.4 million live connections.
- By end-2025 these operators are projecting 10.3 million live connections across their networks. The shift to infrastructure competition will be in full swing by then with full fibre investment by the major suppliers, AltNets and government funding expected to reach £36.7 billion. This figure surpasses the previously estimated £30 billion<sup>5</sup> it would take to provide nationwide FTTP coverage. The resulting competition, which we already see in some areas with three independent operators present, will bring more choice to many parts of the UK.

1 Defined as an organisation deploying broadband infrastructure for wholesale and/or retail use, which is not part of either the UK's incumbent operators BT Group, and which is not Virgin Media as the national cable operator.

2 This year's report focuses on premises passed, not addressed, for fixed infrastructure; past years have been backdated accordingly. There remains some variation in operators' reporting. See general caveat on page 8.

3 Thinkbroadband, [CityFibre skips past Virgin Media to be the second largest FTTP network in the UK](#), 17 May 2022.

4 The fixed wireless access (FWA) market is more difficult to assess due to line-of-sight issues and fragmented supply in the sector.

5 Final report for the Broadband Stakeholder Group: [The costs of deploying fibre-based next-generation broadband infrastructure](#), 2008 p.8, Prism Tactis Report: [Costs for Digital Communications Infrastructures](#), 2017 pages 51 – 57.

## Investment

- Interest and commitment continue to grow strongly in the independent network sector, with investment and expenditure commitments totalling £5.7 billion until the end of 2021 alone.
- From the survey inputs and research, we estimate intended CAPEX spend by the sector from now until end-2025 at over £17.7 billion<sup>6</sup> with operational expenditure of at least £1.5 billion.
- Along with the c.£12 billion FTTP investment by BT Group until the mid-to-late 2020s and more than £2 billion investment by VMO2 until 2028 the UK is on track, for the first time in its history, to have real broadband infrastructure competition. This will offer consumers real choice and drive innovation in the broadband services they consume.
- Fixed independent network deployments are now completely focused on full fibre and gigabit capable networks, with some operators deploying fixed wireless networks in hard-to-reach areas.

## Concerns

- The top two concerns for independent network operators are planning and street works delays; and the threat of overbuild from other operators through Project Gigabit procurements.
- In joint third place are delivery times for services from Openreach or other operators (e.g. EAD circuits, PIA); getting wayleaves; and BDUK's pause on community-led ISPs Gigabit Vouchers affecting current and future deployments.
- The issue of getting wayleaves moves slightly down the list from last year, when it was the top industry concern. This change is likely due to many network operators deploying outside of urban areas, and enhanced legislative measures being put into place.
- Remaining in fourth place this year, an area of increasing significance as network providers continue to scale their deployments, is access to skills and labour post-Brexit; a perennial issue that continues to present itself as an obstacle in terms of network and business operations for many providers.
- A new entrant and in fifth place is Openreach's long-term FTTP pricing offer (Equinox) which could substantially help Openreach overbuild existing AltNet networks and impact their deployment plans, particularly regarding wholesale. Since the 'fibre only' incentivisation programme was launched in October 2021, Openreach have signed up 42 communication providers to the scheme, underscoring industry concerns expressed to Ofcom that it could undermine competition in areas where AltNets are already investing heavily.
- Given the unprecedented amount of investment within the sector, access to finance came at the bottom of the list along with the ability of AltNets to engage with developers and/or local authorities on new build housing plans, which is unsurprising given the December 2021 proposed amendments to the Building Regulations mandating that all new builds are equipped with gigabit-capable connectivity from the outset.

<sup>6</sup> See general caveat on page 8.

## 3. Introduction

This report has been produced in partnership between INCA – the Independent Networks Cooperative Association – and Point Topic, drawing on input from both INCA members and non-members. It provides an overview of the UK’s independent network operator sector as of end-2021 and early 2022 in terms of scale, coverage, ambitions, and concerns. As in the previous two years it includes both fixed and fixed wireless network operators. However, the focus of the report is on fixed full fibre networks and underscores the contribution that independent network providers have made to the sector both in terms of economic impact and meeting the Government’s target of 85 per cent nationwide gigabit-capable coverage by 2025.

In recent years independent network operators have attracted billions of pounds in private investment which has resulted in ambitious rollout plans whilst providing end-users with more choice of suppliers and wider availability of services. Independent network operators have been an integral part in the recent growth of the UK’s full fibre broadband networks. Despite previous challenges within the sector such as Brexit, COVID-19 lockdown restrictions and the acceleration of deployments from major players such as Openreach and Virgin Media O2, independent operators have risen to these challenges and have increased their network coverage from just over 1.2 million premises at the close of 2019 to 5.5 million at the end of December 2021.

Independent operators show no sign of slowing down as deployments will continue at scale and pace over the next few years, although this will remain dependent upon continued investment from the private financial sector along with swifter government and regulatory intervention to reduce the perennial barriers to network deployment.

The resulting overbuild as networks continue to intersect with independent and national incumbents is a reflection of the legislative shift to encourage infrastructure competition and will offer more choice to the consumer. The picture will not be even across the

UK but we expect the bulk of homes and businesses will have a choice of at least two gigabit broadband suppliers, and as high as six or even more in some areas.

### General caveat

*The premises passed, investment and capex projections included in this report are from a number of sources, including INCA surveys, and should be treated as indicative only. Different data sources may be used for the different parameters reported, so it is not possible to directly compare them nor, for example, to divide capex projections with projected premises passed figures to estimate cost per premises passed.*

### Definitions

- **Premises passed** – Point Topic defines premises passed as those that can readily order a broadband service. In our previous reports we included premises addressed as provided to us by operators – addressable premises tend to be classed as homes or businesses located within x metres of a network. The Ofcom definition for full fibre coverage is, “where the network has been rolled out to a ‘lead-in’ that will serve the consumer end premises and where the consumer would expect to pay a standard installation charge for that connection”.<sup>7</sup> We welcome the industry’s move towards more consistent definitions of coverage, but recognise there remain varying definitions and different terms.
- **Connections** – live connections we define as premises which have an active subscription/s to a broadband service. We include both residential and business, wholesale and retail but without double-counting of these figures.
- **Independent operator (also known as AltNet)** – we define this as an organisation deploying broadband infrastructure for wholesale and/or retail use, which is not part of either the UK’s incumbent operator BT Group, and which is not Virgin Media as the national cable operator. This includes privately funded companies, community groups and not-for-profit organisations.

<sup>7</sup> Ofcom’s [Connected Nations 2021 Annex A: Methodology](#).



- **Technologies** – in terms of fixed networks, we cover full fibre-based network deployments, fibre-to-the-premises or home (FTTP/H) and fibre-to-the-building (FTTB) as well as small amounts of legacy VDSL. Fixed wireless access (FWA) deployments are included where we have been able to gain information although this is currently sparse. This report does not cover satellite, 4G, white space or leased line infrastructure.
- **Bandwidth** – we focus on symmetric gigabit capable networks. While there is some legacy VDSL in the portfolio of several operators it is a small and decreasing percentage as new deployments are now exclusively FTTP/B. However, coverage of FWA technology does include sub-superfast bandwidths.

### Next steps

Now in its fifth year, we plan to continue this report on a regular basis in order to follow changes in the market, track advances in coverage and scale, and explore new issues and concerns within the independent community as they arise.

The 2022 survey at the end of this paper has been completed by 21 independent network operators forming a representative sample of the UK independent sector. Our thanks go to all those who have taken part in the survey.

As mentioned above, we rely to a large extent on self-reported statistics to assess the scale of the sector in terms of premises covered and live connections. To increase the rigour of data we will continue to work with INCA and the industry to agree on metrics and outputs, including definitions.

## 4. Assessing scale and ambitions of the independent network sector

**Point Topic provides estimates of premises passed for the UK's fixed independent operators and live connections as at the end of December 2021. In addition, we have estimated, from available data, premises addressed or covered by fixed wireless access infrastructure of independent operators, as well as total connections for these players.**

We collect expectations and aspirations for some (not all) of these numbers at the end of 2022, and end of 2025.

Estimates are based on public announcements, survey data supplemented by Point Topic and Thinkbroadband research as outlined above, either reported to us by network operators or using our own estimates when actual numbers are unavailable.

Table 1 below contains estimated key metrics for the UK's independent fixed networks, with full fibre dominating.

### Premises passed and connected by fixed independent networks for end-2021

At end-December 2021, the UK's independent network operators are estimated to have passed over 5.46 million premises with their fixed broadband infrastructure. This is an increase of 111 per cent year-on-year. The vast majority uses ultrafast FTTP and FTTB technology.

Live connections for independent operators stood at an estimated 1.03 million at the end of December 2021, up from 845,000 or 21 per cent on last year (see Figure 1). As network build accelerates there is inevitably some lag between build and take-up.

### Premises addressed and connected by FWA networks for end-2021

Independent FWA infrastructure is estimated to have passed or addressed over 2 million premises at the end of 2021. Live connections over independent network operators' FWA infrastructure remain at an estimated 110,000.

### Expectations for end-2022

We asked survey respondents to provide an indication of how many premises passed and live connections they expected to have at end-December 2022. Several operators have given public indications of their future coverage aims.

We estimate total plans are for 11.5 million premises passed (which is consistent with the growth seen over the last two years), and over 1.4 million connections by fixed network operators. This does not take account of infrastructure competition, which is already growing among independent network operators as their coverage expands.

**Table 1: Estimated key metrics for UK independent network sector**

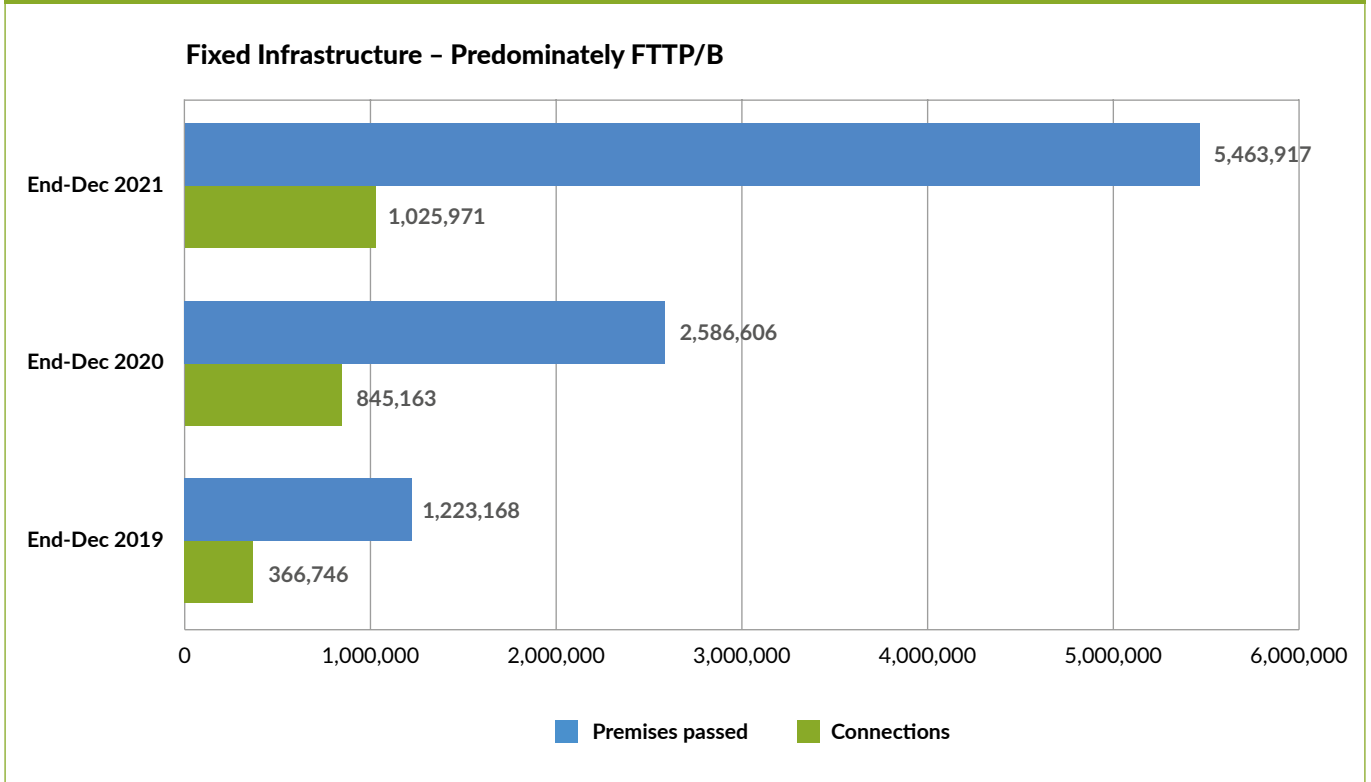
Total Independent Operators Fixed Infrastructure - Predominately FTTP/B*	Connections	Premises passed
End-December 2019	366,746	1,223,168
End-December 2020	845,163	2,586,606
End-December 2021	1,025,971	5,463,917
Aspirations for End-December 2022	1,436,514	11,561,167

\* 2019 and 2020 estimates include some FTTC technology connections previously stated in survey results and public announcements. End-2021 to end-2025 estimates are based on fixed full fibre independent network operators' FTTP/B network footprints and connections.

See general caveat on page 8.

Source: INCA survey, Point Topic research and estimates.

Figure 1: Key data changes from INCA surveys from 2019-2022



### Aspirations for end-2025

We asked operators about their aspirations for the end of 2025. Their response, combined with planned investments announced by both BT and VMO2 suggests that at this stage the government’s target of over 85% Gigabit-enabled properties will be exceeded. Uncertainty in the extent of infrastructure competition however makes estimating a figure for premises passed difficult.

However our survey results, combined with public announcements and Point Topic research indicate that independent networks are aiming for over 10m live connections by the end of 2025 which would represent significant market share and deliver upon the Government’s infrastructure competition objectives.

Unfortunately, there is still too little information available in the market for us to provide robust future estimates for the fixed wireless sector on this basis. However, DCMS along with INCA anticipate that with recent developments in fixed wireless technology it will become a vital element in the overall mix of technologies to help meet the government’s ambitious 2025 target. This is particularly likely in challenging, sparsely populated areas. A significant proportion of INCA’s operator members have years of experience in deploying rural FWA networks and are well placed to deploy a mix of full fibre and wireless networks to suit local conditions.

# 5. Independent network sector coverage mapping

**Point Topic maps broadband provision throughout the UK, including footprints of the country's independent network operators.**

**As part of the INCA survey, we asked independent operators to provide their coverage details. We have also used our own research and that of our partner Thinkbroadband to provide a view of independent network infrastructure provision today as the sector expands rapidly. Figures 2 to 9 provide more detail.**

Deployments continue to stretch across the UK. Most regions are seeing more choice and better broadband as a result.

There are still notable areas of relatively poor coverage and although they tend to be sparsely populated it will be some time before choice arrives for some rural areas.

While public funding is now focusing on those places that are less commercially viable there is still work to do to allow independent operators to plan expansion properly with intervention areas and regulatory measures being balanced to allow consumers the freedom to pick their preferred suppliers.

Coverage in London continues to expand out from the central areas. With more and more Local Authorities prioritising choice and coverage, planning

has become a little easier to navigate. The independent networks are accelerating outside the capital too with significant action in the North West as well as continued expansion in the Midlands in almost all towns and cities.

Increasingly though it is obvious that a vibrant and well-funded collection of independent network operators is making progress outside the core of the earlier deployments. The South West of England has also seen plenty of activity during 2021.

The geography of the UK, human and physical, can make it challenging to deliver quick and cost-effective progress for full fibre networks. In a competitive market operators need return on investment that can easily be eroded by challenging or long-distance network deployment. It is a lot more expensive to reach some rural properties which still need good broadband.

While Project Stratum powers ahead in Northern Ireland there are large gaps in the North of England and Scotland as well as Wales (see Figure 2 opposite).

There is plainly still work to do before the UK gets the broadband service and choice it deserves. Help will come from Openreach Passive Infrastructure Access (PIA) and appropriate public sector intervention, but fixed fibre provision will need to be encouraged and supported as Government and the private sector seek to drive future proof broadband deep into the country.

Figure 2: Fixed independent operator presence in UK at Dec 2020 and 2021

2020 2021

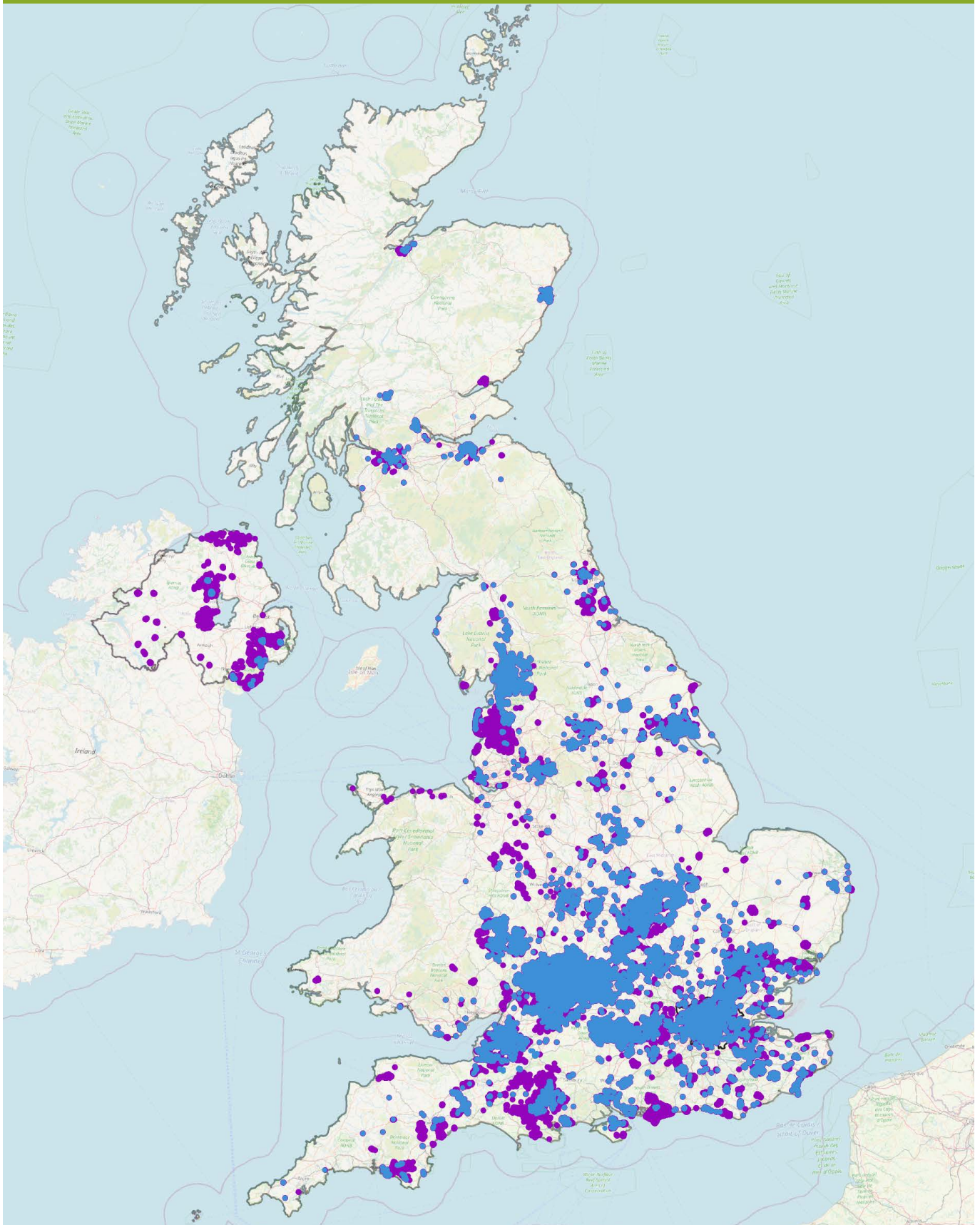
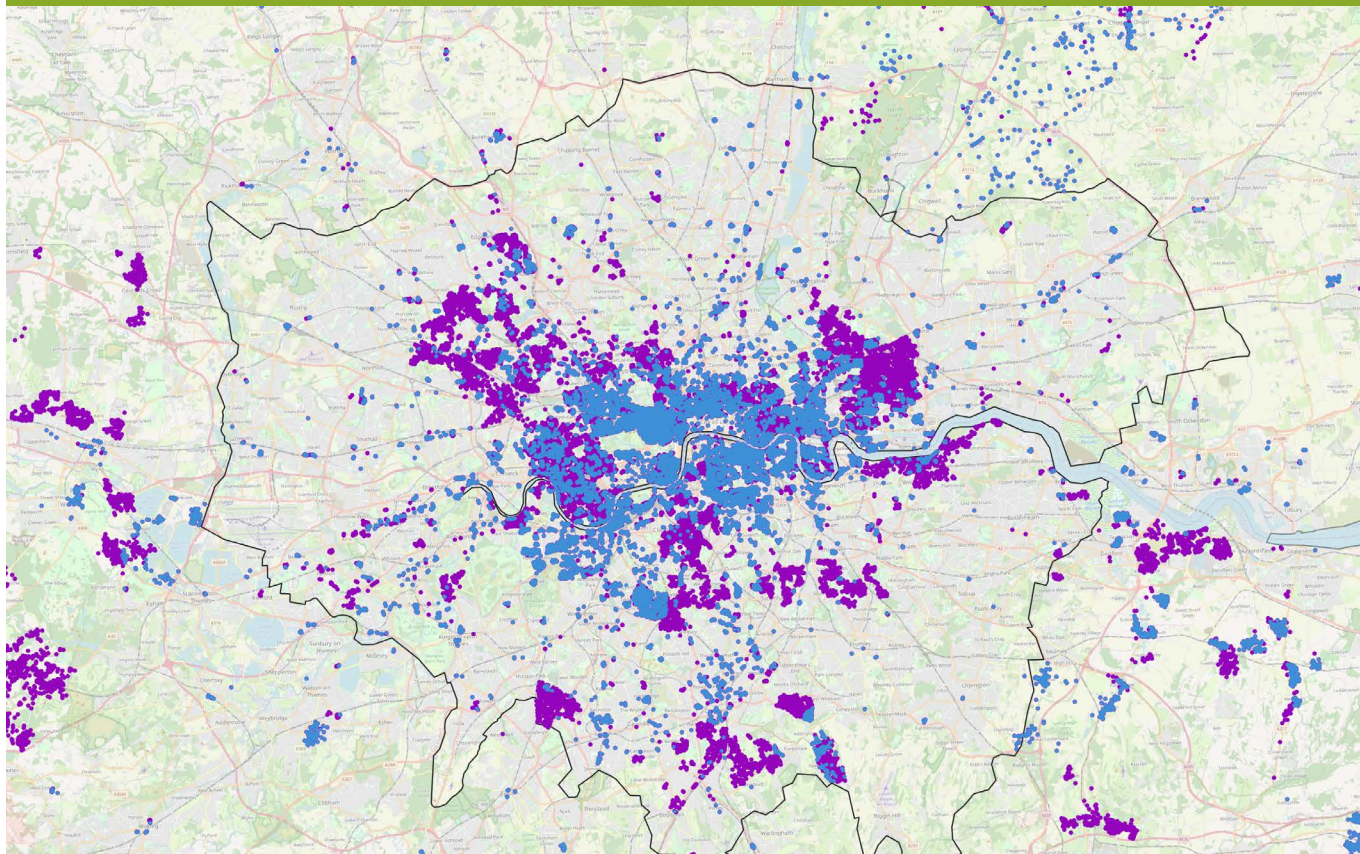
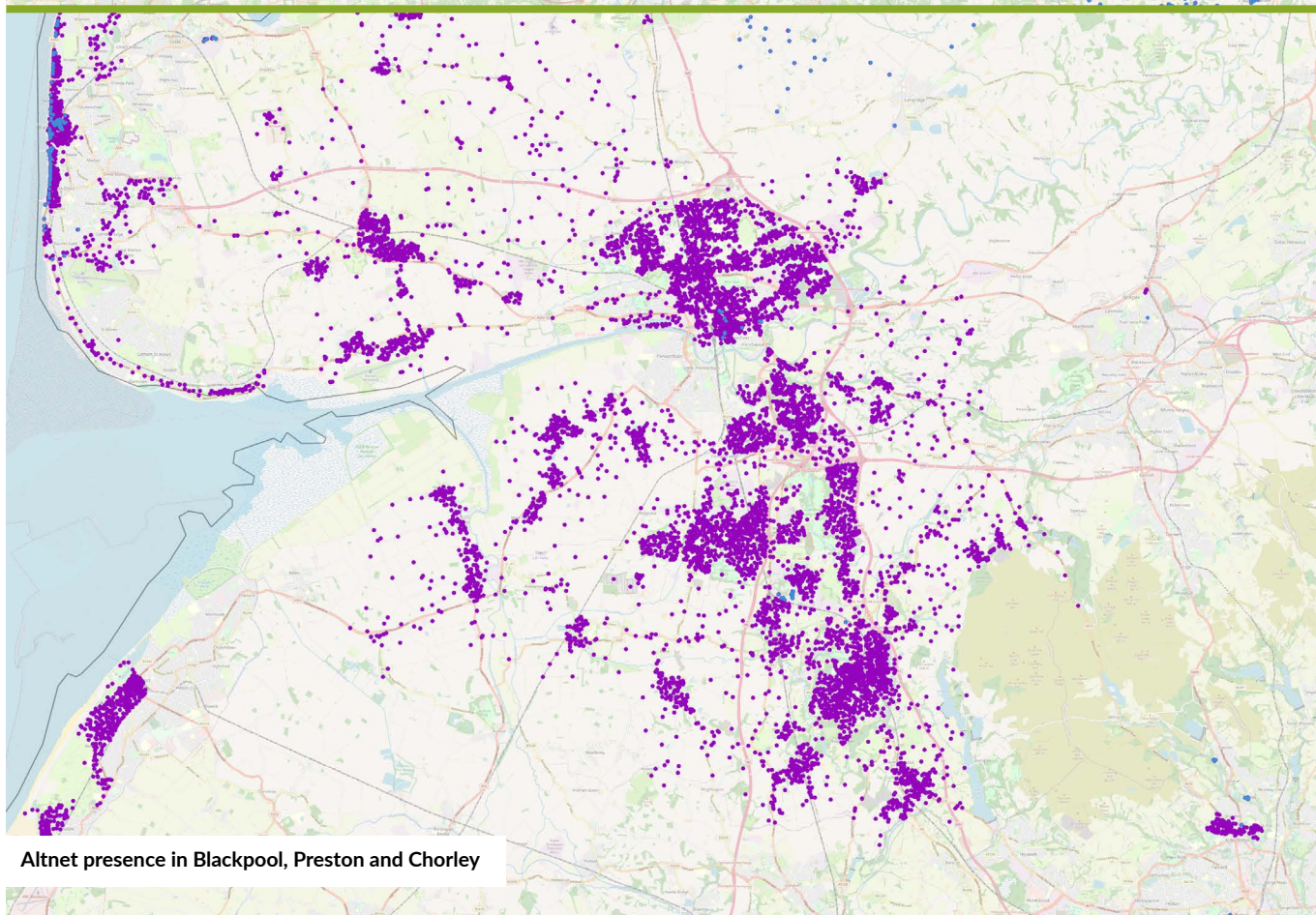


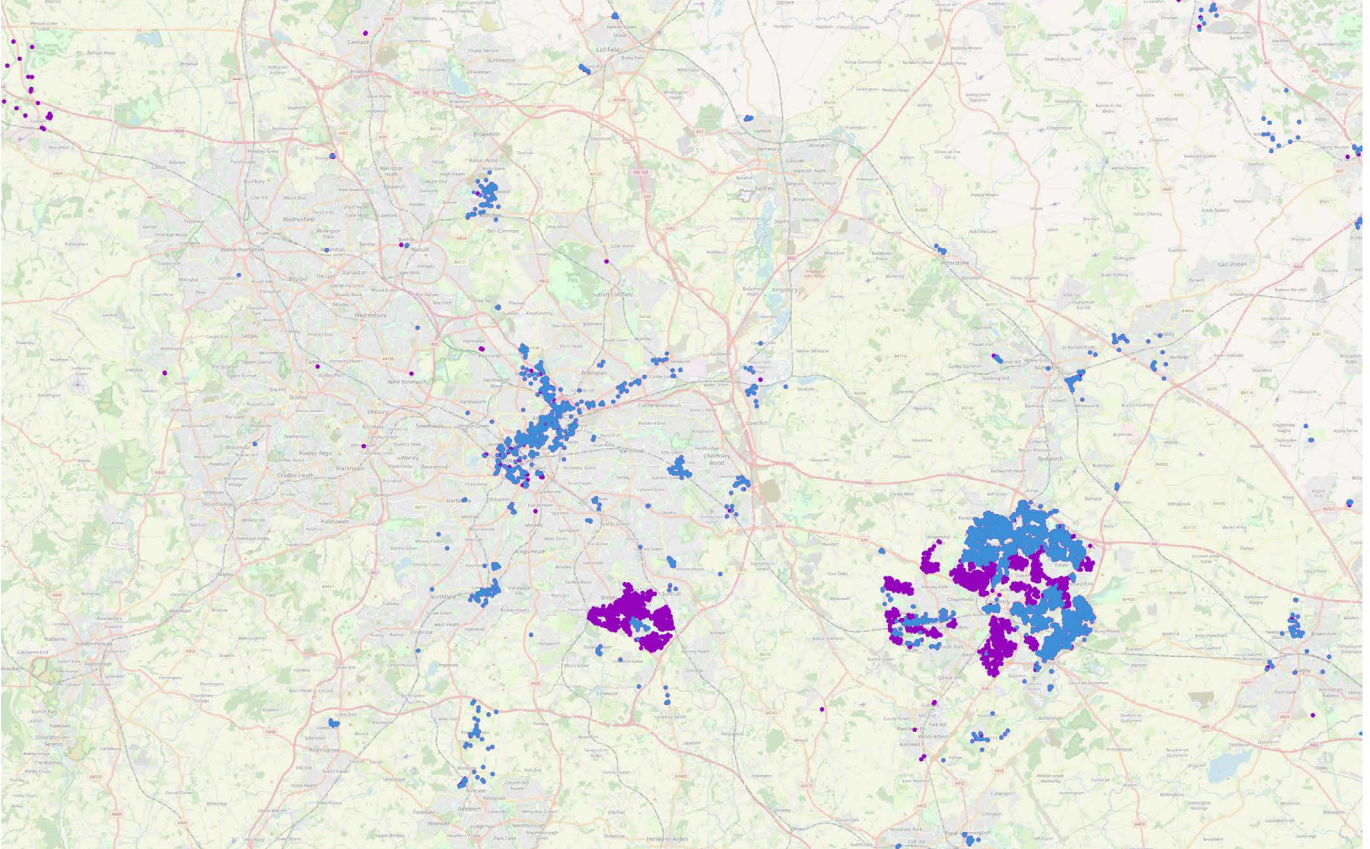
Figure 3: Fixed independent operator presence in various UK regions Dec 2020 and 2021



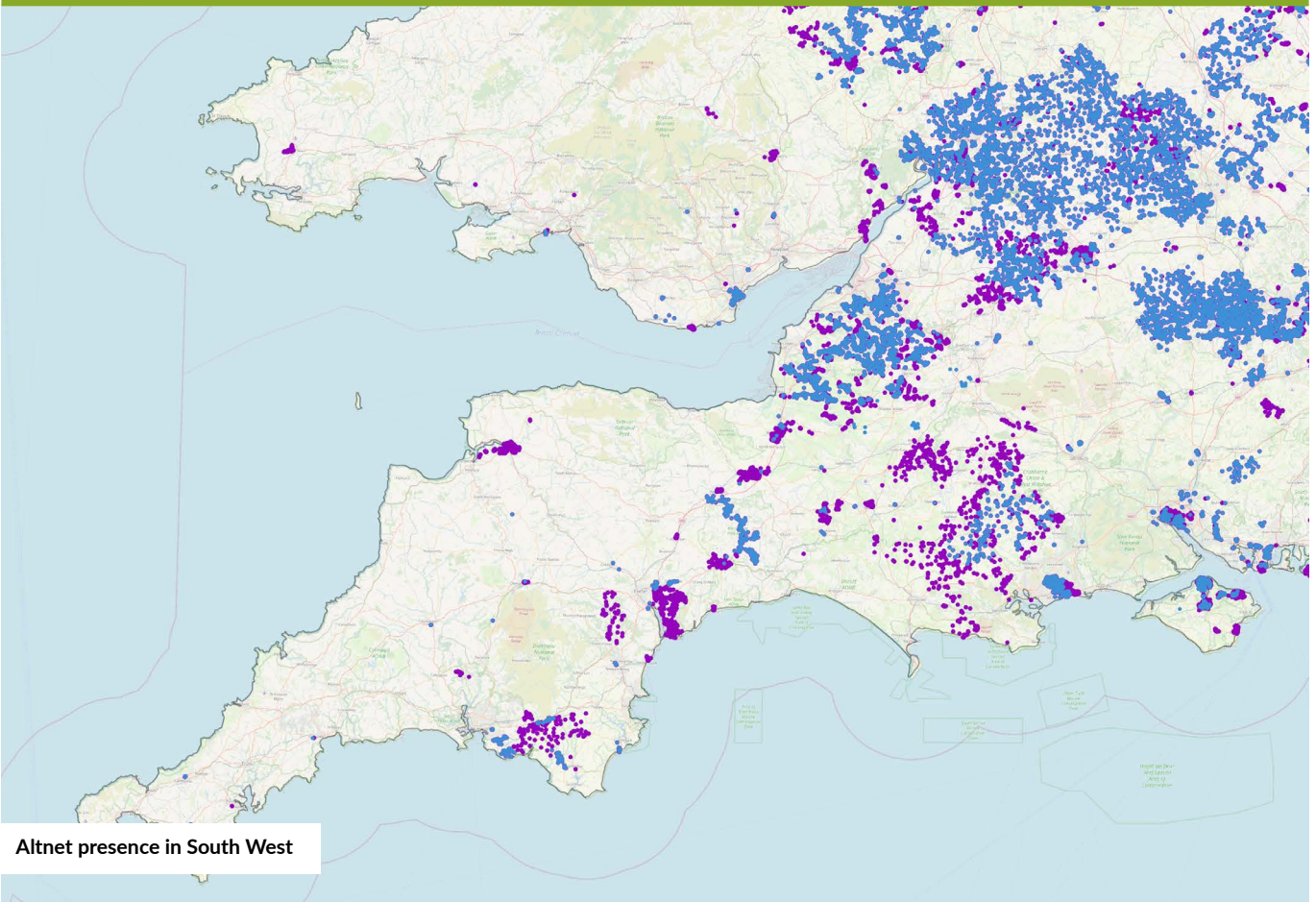
Altnet presence in London



Altnet presence in Blackpool, Preston and Chorley



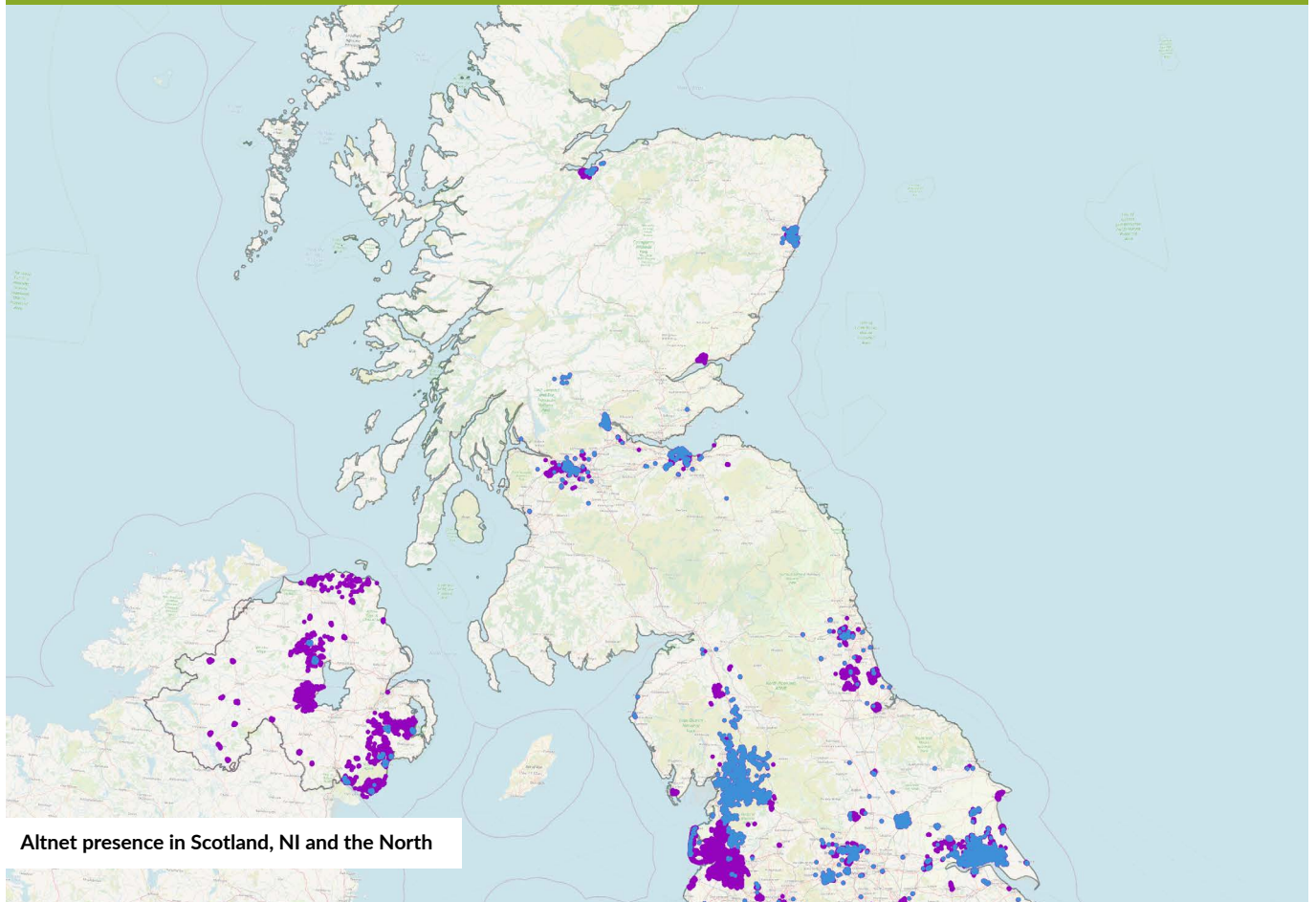
Altnet presence in Birmingham, Coventry, Solihull



Altnet presence in South West

Figure 4: Independent networks in Scotland, Northern Ireland and the North of England

2020 2021





## 6. Independent network sector investment

According to the DCMS July 2021 Policy Paper, **Digital Regulation: Driving growth and unlocking innovation, “digital technologies are the engine driving the UK’s economic growth. The digital sector contributed £151 billion in output and accounted for 1.6 million jobs in 2019.<sup>8,9</sup> Over 34,000 new tech businesses were created in 2018 alone,<sup>10</sup> and the UK attracted more international venture capital investment into technology businesses in 2020 than France and Germany combined.”<sup>11</sup>**

Looking more closely at the telecoms sector, Ofcom stated in their latest Communications Market Report, published in July 2021, that telecoms revenues made a £31.5 billion contribution to the UK economy. Retail fixed services generated £14 billion in revenue in 2020, while wholesale services produced £5.1 billion.

The UK telecoms sector therefore has remained an attractive prospect for many private financial firms. Especially independent network providers who have been experiencing unprecedented levels of engagement from the investment community. Throughout 2021 and early 2022 press outlets have been awash with public announcements highlighting further rounds of private funding and consequently an increase in and acceleration of AltNet operators’ network deployment plans.

- Adding up the announcements made in 2021 we get over £5.7 billion worth of private funding. It is not immediately clear how much of this is ‘new’ money so exercise caution if combining with previous statements.

- Between January 2022 and the close of March 2022 there has been an additional £784 million in private investment announced, all of which is additional.
- From 2017 to 2020, an estimated total of £15.1 billion in private investment-related funding has been announced.

To help provide better insight we asked the survey respondents to provide us with their totals for expected CAPEX and OPEX this year and next year as well as up to 2025.

We have added additional estimates to those figures collected through the survey for intended spend by independent network operators based on public announcements over time, where we are sure they are additional funds. Table 4 provides a summary.

Operational expenditure will also expand to meet the requirements of larger networks and more customers. From survey inputs and public statements, we are projecting an OPEX spend of between £1.5bn and £1.7bn up to 2025 for the fixed full fibre independent operators.

A summary of selected financial and network expansion related announcements is detailed in [Annex 1](#) at the end of the report. Earlier announcements can be found in our previous report for INCA, [Metrics for the UK independent network sector](#), published in May 2021.

**Table 4: Intended capital expenditure (CAPEX), estimates for fixed full fibre operators**

Current financial year (2021/22)	Next financial year (2022/23)	2021 to end-2025
£1.755 billion	£2.104 billion	£17.648 billion

*Note: Figures form only part of the sector; capex relates to intended capital investment, not actual.*

*See general caveat on page 7.*

*Source: Operators taking part in INCA surveys 2022, 2021, 2020; public announcements.*

8 National Statistics and DCMS, [DCMS Economic Estimates 2019: Gross Value Added](#), 10 December 2020.

9 National Statistics and DCMS, [DCMS Sectors Economic Estimates 2019: Employment](#), 30 April 2020.

10 DCMS, [DCMS Sectors Economic Estimates: Business Births and Deaths](#), 9 July 2020

11 Tech Nation Report 2021, [The future UK tech built](#), 2021.

## 7. Independent network sector concerns

**The INCA survey asked operators to rate how concerned they are about a range of factors in terms of challenge to their network deployment and ability to offer services to and acquire customers. In this section we outline the shift in concerns from the 2021 survey results. Worth noting is that access to skills and labour post-Brexit is an increasing concern within the sector and is discussed in further detail in [Section 8](#) below.**

The top three concerns in 2022 are:

1. Planning and street works delays and/or costs
2. Project Gigabit procurements and threat of overbuild of your commercial networks
3. Delivery times for services from Openreach or other operators (e.g. EAD circuits, PIA); getting wayleaves; BDUK's pause on community-led ISPs Gigabit Vouchers affecting current and future deployments.

Planning and street works delays and/or the costs associated with these undertakings moves up from last year to top the list of sector concerns. A perennial challenge, telecoms companies have continually raised concerns about conflicting approaches between local authorities and the varied interpretation of street works legislation. Operators note that without any overarching approach the inconsistencies will continue to remain a significant barrier creating uncertainties in planning and inefficiencies in full fibre network infrastructure deployment. The Government has stated that road and street works account for 70 per cent of the cost of fibre broadband deployment<sup>12</sup> and coupled with inefficient approaches to planning permissions and street works delays, operators have been continually highlighting the need for reform in order to meet government fibre network targets whilst also remaining competitive in an increasingly saturated market.

### **BDUK Project Gigabit concerns**

A new entry in this year's survey was operators concern about Project Gigabit procurements and the threat of overbuild of their commercial networks. With the large influx of investment along with the proliferation of AltNet communication providers that are increasing their network rollouts at scale and pace,

Project Gigabit's significant number of procurements being earmarked for regional suppliers will remain a challenge to smaller players looking to retain a level of competitiveness.

At the end of February 2022, Point Topic reported just over 170,000 premises had access to two or more independent fibre networks and 11 local authorities had overlapping networks from three independent fibre network operators, while 99 local authorities had two independent fibre networks intersecting.<sup>13</sup> In conjunction with this and in joint third on the list of concerns by operators was BDUK's continued focus on commercially viable rollouts and procurements, whilst community-led Gigabit Vouchers programmes get side-lined or take a lengthy period of time to come to fruition.

BDUK announced in September 2021, that to enable the intervention area to be finalised ahead of procurement there will be a temporary pause to voucher eligibility for all UPRNs identified in an intervention area at the Pre-Procurement Market Engagement (PPME) stage. BDUK aims to minimise the pause wherever possible but, on average, expects it to last around 6-8 weeks.

During this temporary pause, BDUK will be confirming voucher priority areas (within regional supplier procurement areas only) as an exceptional process to enable the benefit of the early coverage that can be provided where there are firm and clear voucher plans. Once the procurement launches, suppliers will be able to submit proposals and request vouchers for premises within these voucher priority areas during the procurement process. Again, this demonstrates the uncertainty and lengthy processes in place for those suppliers relying on the voucher scheme to effectively deploy to consumers in areas that are not considered commercially viable to larger operators.

### **Delivery of services from larger providers hindering deployments**

Moving up the list of concerns is delivery times for services, such as EAD circuits and physical infrastructure access (PIA) from Openreach or other operators. In Ofcom's annual Openreach monitoring report published on 8 December 2021, the regulator stated that the supplier's PIA product remains an integral part for communication providers wanting to

<sup>12</sup> DCMS, DfT, [Street Works Toolkit](#), 23 May 2019.

<sup>13</sup> Point Topic, [Superfast and Ultrafast Broadband in the UK](#), 25 March 2022.

deploy their own fibre networks. Ofcom noted that as of September 2021, over 130 providers were registered with Openreach compared with 90 in the previous year, 99 operators placed PIA orders with 56 of those providers using Openreach's PIA to build their full fibre networks.<sup>14</sup> One significant challenge that operators have noted was Openreach's defective poles (D-Poles) hampering their physical wire deployments.

Despite Openreach trying to streamline access to PIA product through an enhanced Application Programming Interface (API) introduced in mid-2020 and Openreach reporting that the average time to verify Network Adjustments stands at 2.05 days, with 99 per cent verified within five days<sup>15</sup> providers remain concerned about the efficiency and effectiveness of accessing these services either from the incumbent or other dark fibre suppliers. This issue has risen to the fore as access to cost-effective backhaul services in general has also moved up the list (number 6) of sector concerns.

### Telecoms sector shifts concerns

Wayleaves remained an issue, however it did move down two places from the top spot last year. Fifty-seven per cent of respondents stated that their average wait time in securing wayleaves was 6 to 12 months, with 29 per cent stating less than six months and 14 per cent noting a wait between 18 to 24 months. This does represent a glacial shift in the right direction as compared with previous years' outcomes when several operators were reporting the average agreement time taking more than 2 years to secure.

With global supply chain issues and shortages of technological equipment and services along with the overall increase in the cost of supplies and equipment, these ranked relatively low on the list of concerns, coming in at joint tenth and joint twelfth, respectively. Overbuild by other suppliers fell two places to joint tenth on the list as suppliers concede acceptance of the inevitability of crossover which becomes reinforced with ever-increasing build plans in a very crowded and geographically limited marketplace. Figure 8 lists the full range of responses. Table 5 illustrates changes year-on-year.

We have introduced several new 'challenges' (shown in **bold** in Table 5) compared to earlier years, to reflect feedback and better represent the concerns that operators and providers face today in the market.

Perhaps of most note is the 'Switching between Operators/One Touch Switching' challenge which despite mandatory regulation coming into effect in April 2023 for suppliers to implement, remains relatively low on the list of concerns. More on this topic can be found below.

### New survey questions

As we have seen above the annual survey has evolved and added sections that are of particular relevance at the moment.

For example, the Openreach Project Equinox scheme affecting independent operator deployments and planning, particularly regarding wholesale services. BT Group reported on 12 May 2022 that since the programme's inception in October 2021 the product has gained good traction with 42 communication providers having signed up to the offer. The incumbent also noted that through this scheme it has seen its full fibre end user connections increase to 1.8 million, with 263,000 additions since the end of December 2021 alone.<sup>16</sup> As Ofcom has stated that it will not introduce further regulatory interventions on the offer as it does not perceive a hindrance to competitiveness within the market, independent operators may find it increasingly difficult to balance the cost of extensive network deployments whilst offering a service to consumers that remains profitable, whether directly or through wholesale channel partners.

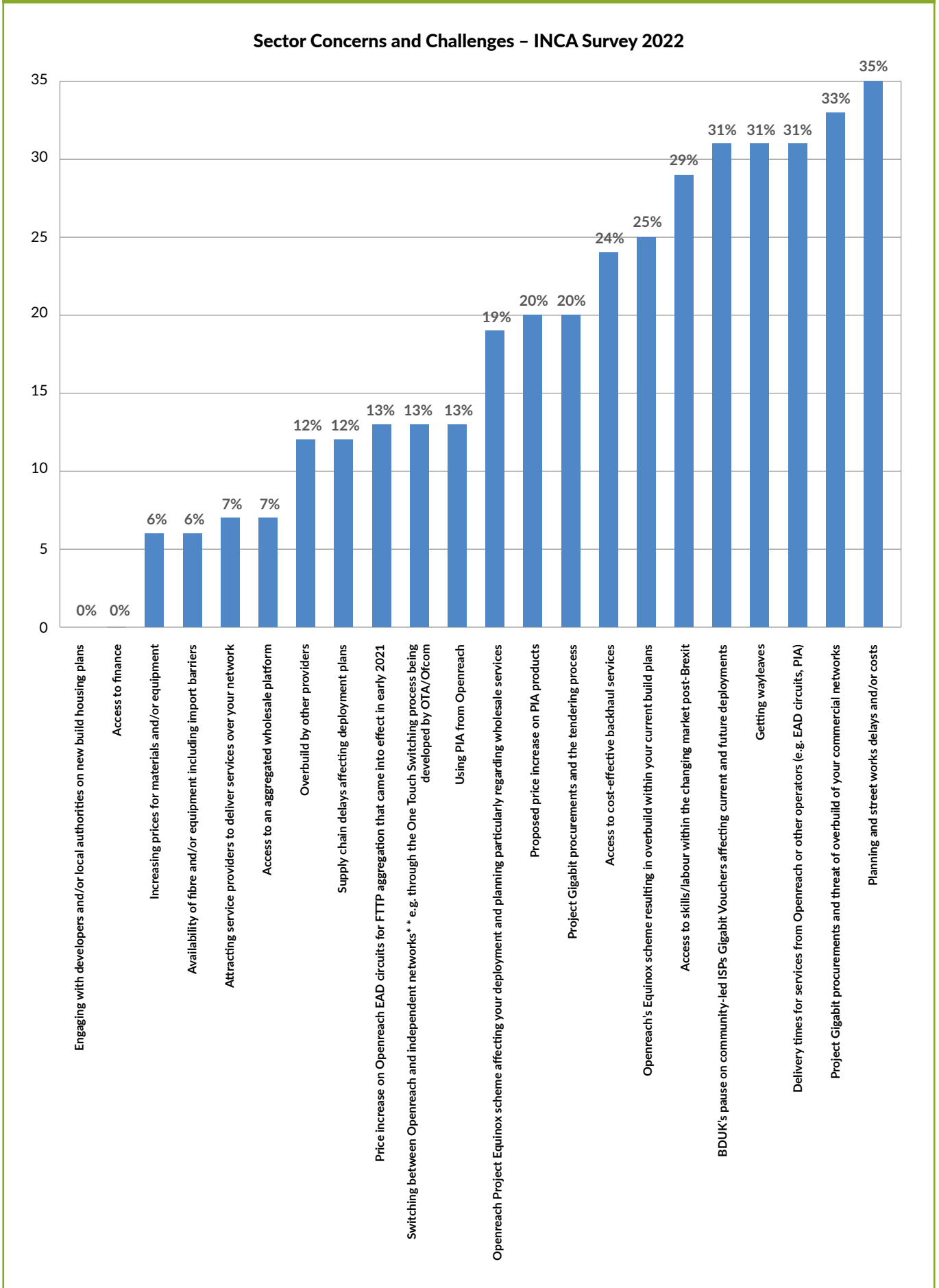
Another pertinent area for consideration is the sector's readiness for the introduction of Ofcom's 'One Touch Switching' (OTS) coming into effect in April 2023, which will allow consumers to change their broadband supplier by contacting their new ISP without contacting their current provider, with the onus of switching services being on the new operator. A considerable undertaking that will have significant technological and monetary impacts on providers. We asked respondents to characterise their current state of readiness to implement the new system.

14 Ofcom, [Ofcom's Annual Openreach Monitoring Report 2021](#), 8 December 2021, paragraph 3.23.

15 Ofcom, [Ofcom's Annual Openreach Monitoring Report 2021](#), 8 December 2021, paragraph 3.24.

16 BT Group, [BT Group plc Q4 FY22 trading update](#), 12 May 2022.

Figure 8: Independent network operators' concerns



**Table 5: Changing concerns 2021 to 2022**

<b>Sector Challenges</b>	<b>Rank 2022</b>	<b>Rank delta from 2021</b>
Planning and street works delays and/or costs	1	+2
<b>Project Gigabit procurements and threat of overbuild of your commercial networks*</b>	2	
Delivery times for services from Openreach or other operators (e.g. EAD circuits, PIA)	3	+3
Getting wayleaves	3	-2
<b>BDUK's pause on community-led ISPs Gigabit Vouchers affecting current and future deployments*</b>	3	
Access to skills and labour within the changing market post-Brexit	4	=
<b>Openreach's Equinox scheme resulting in overbuild within your current build plans*</b>	5	
Access to cost-effective backhaul services	6	+3
<b>Project Gigabit procurements and the tendering process*</b>	7	
Proposed price increase on PIA products	7	-2
<b>Openreach Project Equinox scheme affecting your deployment and planning particularly regarding wholesale services*</b>	8	
Using Passive Infrastructure Access (PIA) from Openreach	9	+4
<b>Switching between Openreach and independent networks e.g. through the One Touch Switching process being developed by OTA/Ofcom*</b>	9	
Price increase on Openreach EAD circuits for FTTP aggregation that came into effect in early 2021	9	-2
<b>Supply chain delays affecting deployment plans*</b>	10	
Overbuild by other providers	10	-2
Access to an aggregated wholesale platform	11	+1
Attracting service providers to deliver services over your network	11	+3
Availability of fibre and/or equipment including import barriers	12	+3
<b>Increasing prices for materials and/or equipment*</b>	12	
Access to finance	13	+3
Engaging with developers and/or local authorities on new build housing plans	13	-2

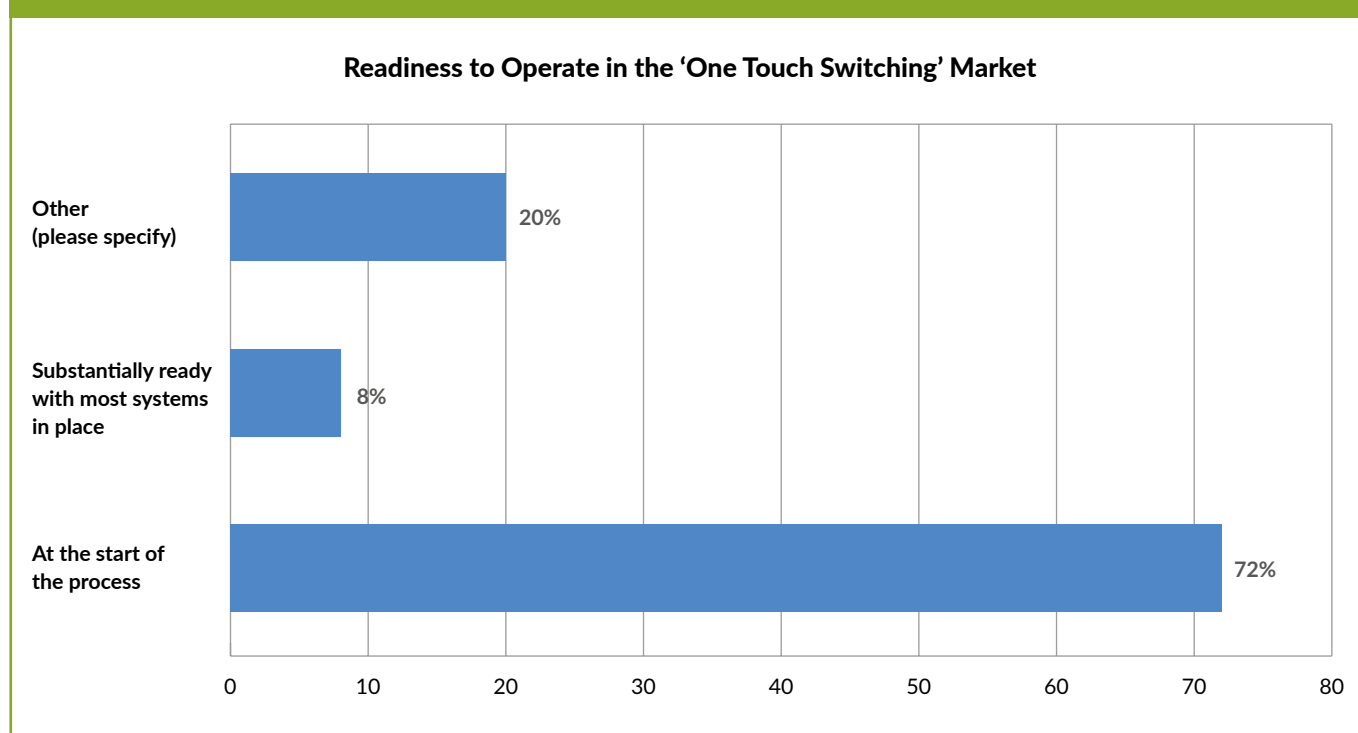
\* New survey challenge questions for 2022.

Figure 9 below shows that the majority of the respondents (72%) were at beginning the process compared with 8% who stated that they were substantially ready with most systems in place.

Respondents who answered 'Other' noted that they either were in the development stage of the process or had not yet started the process. Additionally, operators were asked: Are there any additional measures or support you would like to see in regard to the 'One Touch System'?

There were several responses ranging from Ofcom taking a greater role through the implementation in support of the existing OTA and industry work, further guidance by INCA along with significant market players taking on a larger share of the implementation costs. However, this last point does come with the potential for the larger players to ultimately take greater market shares of consumers due to their significant financial resources and support. However, these responses are likely to change over time given that the various specialist industry groups overseeing the new procedures were also at early stages of their planning at the time of the survey.

Figure 9: How would you characterise your readiness to operate in the 'One Touch Switching' market?



## 8. Employment issues and the challenge to operations

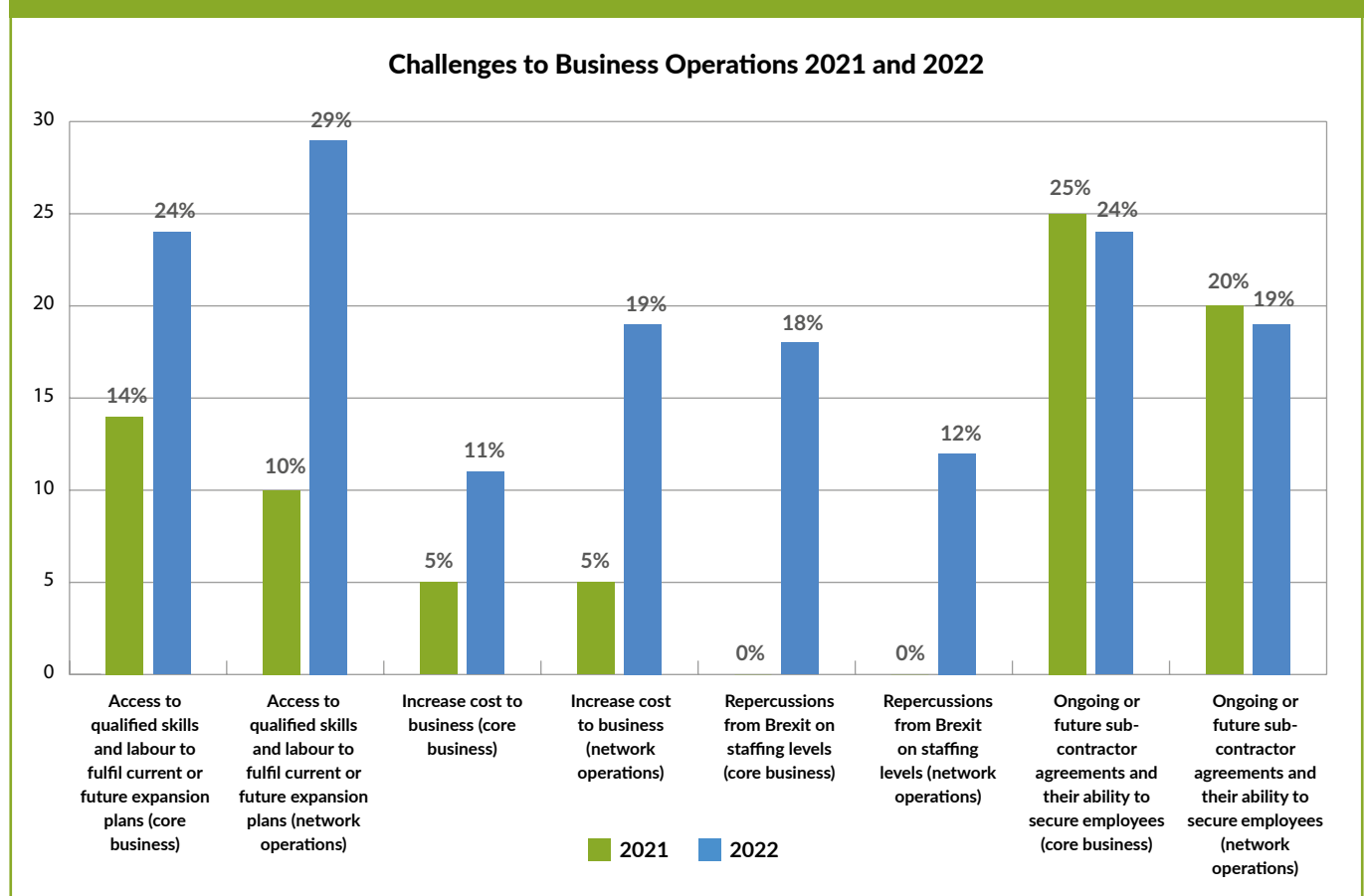
In last year's report we introduced a section covering employment issues for AltNet suppliers ranging from securing skilled labour to the general increase in cost to business including labour and materials. We asked operators to consider these effects in terms of general business operations and network operations. For this year's survey we have asked the same set of questions and have compared the responses year-on-year (see Figure 10).

We asked the operators: How would you rate the following employment issues in terms of their challenge to your core business operations and your network deployment and maintenance operations?

Securing the adequate amount of skilled labour to support operators' expansion plans and network maintenance operations clearly has risen as a key issue

for operators. Recruiting and retaining the sufficient labour force both in the UK and from the EU remains an obstacle for operators. With Brexit firmly bedded in and the lack of free movement for potential European workers coupled with the high cost of living in the UK, the telecoms sector will need to initiate swift and decisive action to draw from the domestic workforce to support future growth ambitions. Given the time and financial commitment required to train employees, operators will need to prioritise an increasingly proactive and innovative approach to addressing a potential labour force crisis. At a recent ISPA Parliament and the Internet Conference held on 23 March 2022, INCA Chair Alex Blowers noted that more fluidity between the sector and government is vital to promoting the industry as a long-term employment option for recent graduates through the creation of internship programmes and apprenticeship schemes.

Figure 10: Employment issues and the challenge to operations



## 9. AltNets Environmental, Social and Governance (ESG) and Net Carbon Zero Agendas

**ESG and Net Carbon Zero agendas for businesses to attract investment, skilled employees and customers has become of increasing importance in recent years. The telecoms sector has been developing robust strategies to reduce its impact in areas contributing to climate change whilst bolstering its appeal to investors and consumers.**

In this year's survey we wanted to ascertain the independent network operators' level of activity in working towards the government's Net Zero target, which seeks to decarbonise all sectors of the UK economy by 2050.

We asked respondents: Do you currently have any initiatives or programmes in place to support the Net Zero/ESG agendas? If yes, are your programmes supporting the reduction of scopes 1, 2 and/or 3 emissions.<sup>17</sup>

There were 15 responses to this section of the survey with Table 6 outlining their programme status along with which type of scope areas they are focusing on.

Nearly three-quarters of respondents are taking a pro-active stance on promoting a more sustainable approach to reducing their carbon footprints, just over a quarter have yet to implement any agenda or policy in this field. For those respondents that did have a scheme in place they were addressing their own direct emissions such as reducing their energy consumption levels, reducing waste and reusing materials. Those operators (9% of respondents) focusing on Scope 3 indirect emissions, were looking at ways of working with sustainable suppliers to create more environmentally friendly equipment, packaging, and other materials. Whilst other respondents were implementing a shared carbon footprint reducing code of practice amongst their suppliers.

This will be an ongoing pertinent topic within the sector and will be monitored in next year's survey to track how quickly progress is being made in this area.

**Table 6: Independent Network Operators Net Zero Carbon target activities**

Net Zero Carbon Agendas		Scope 1	Scope 2	Scope 3	No further information provided
Yes	74%	73%	0	18%	9%
No	26%	N/A	N/A	N/A	N/A

<sup>17</sup> Scope 1 is defined as direct emissions from a company-owned or controlled resource that releases emissions straight into the atmosphere; Scope 2 emissions are energy indirect emissions that are being released into the atmosphere associated with the consumption of purchased electricity, heat, steam and cooling; Scope 3 is other indirect emissions that are a consequence of a company's actions, which occur at sources which they do not own or control and which are not classified as scope 2 emissions, e.g. emissions from contractors, supply chain procurement.



## 10. Appendix A

### Statement on effect of COVID-19 pandemic

The INCA survey, as well as other research for this report, was undertaken as the UK had removed nearly all the national restrictions which had been in place the previous year. In January 2021, a third and final national lockdown was introduced and by the end of February 2021, the Prime Minister's roadmap to lifting the lockdown was in place. By July 2021, restrictions had fully eased, and the closed sectors of the UK economy had reopened. Despite the rise of the Omicron variant in December 2021, along with the Government's announcement of winter 'Plan B' measures, no further lockdown measures were put into place, with all sectors returning to pre-COVID-19 levels of activity.

Since the pandemic, UK operators have proven their resiliency, despite a prolonged period of turbulent operational conditions through ongoing international supply chain issues and labour shortages. Network

suppliers have maintained a robust operational performance with network deployments and customer installations continuing at pace since the close of 2020.

INCA and its members are grateful for the support provided by Government in recognition of the increased importance of digital communications for the country since April 2020, when the pandemic first took hold.

The pandemic has undoubtedly underscored the importance of the UK's reliance on a robust and resilient network infrastructure to support the country's increasing appetite for digital services. This report demonstrates the ongoing legitimacy and importance of the UK's independent network operators in supporting the country's digital requirements through their current fixed network coverage, ambitious future build plans and unprecedented levels of investment.

# 11. Appendix B

## Basis for research

In compiling these statistics, Point Topic has relied heavily on self-reporting by network operators. Where numbers are unknown, we have used our own estimates including postcode data if available. We do this in conjunction with our partner Thinkbroadband.

INCA members were surveyed during February and early March 2022. Survey questions can be found at <https://www.surveymonkey.co.uk/r/IndependentNetworkSurvey2022> and in Appendix C.

The report also draws on Point Topic's continuing full fibre, gigabit, superfast and ultrafast Broadband Update and Broadband Geography research programmes, which have been gathering information and datasets since June 2009. This research is used particularly in assessing expansion in recent years of the independent network operator footprint.

## Research aims

By gathering information on coverage in terms of premises passed, live connection numbers, expansion plans and key concerns on an aggregated basis, the independent sector will be better able to demonstrate to policy makers, Ofcom, investors and the media, the role it is playing and the advances it is making in bringing ultrafast broadband to UK homes and businesses.

This is especially important given Ofcom's approach to the regulation outlined in the Statement: Promoting investment and competition in fibre networks – Wholesale Fixed Telecoms Market Review 2021–26, which works in conjunction with the Government's £5 billion Project Gigabit programme, aiming to reach 85 per cent gigabit-capable coverage by 2025 and increasing to complete nationwide coverage by 2030. The independent sector has played a key role in those objectives and will continue to contribute significantly to a fully fibred UK.

## 12. Appendix C

### Independent Networks Survey – Spring 2022

#### Help us make the case for the independent operator

**Each year INCA commissions Point Topic to survey the independent operators to assess investment, actual and planned network coverage and important challenges the sector faces. As private investment by independent providers has steadily increased, with an estimated £18 billion being pumped into the gigabit broadband sector up to 2025, the focus of this year's survey will be on how this investment will result in the scaling up of deployments and operations along with the current state of play within the independent networks sector.**

The data collected from this survey is anonymised and aggregated into a report that forms an integral and crucial part of INCA's work to keep government and Ofcom apprised of the fast-growing significance of the sector and the investment generated, whilst underscoring the impact independent providers are

having on the realisation of the UK's gigabit targets. We are seeking responses from all AltNets regardless of INCA membership, including those belonging to other associations including UKWISPA.

Completing the survey should not take more than 15 minutes of your time.

It would be really helpful if you are able to answer as many of the questions below as possible. If you prefer, we can contact you by phone instead to cover some or all of the questions – please contact Veronica Speiser at Point Topic, direct tel: +44 (0)7508 802243, [veronica.speiser@point-topic.com](mailto:veronica.speiser@point-topic.com)

If you are not the person in your organisation who can answer the survey, please forward the survey link (<https://www.surveymonkey.co.uk/r/IndependentNetworkSurvey2022>) to someone who can.

Many thanks for your help.

---

#### Contact Information

##### Your details

Name:

Company:

Email address:

## Fixed Network Information

Please provide details of your current/planned broadband networks.

### 1. What type of fixed wired networks do you build? (tick all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Fibre to the Premises (FTTP)       | <input type="checkbox"/> Ethernet  |
| <input type="checkbox"/> Fibre to the Home (FTTH)           | <input type="checkbox"/> Fibre to the cabinet (FTTC) LLU   |
| <input type="checkbox"/> Fibre to the Building (FTTB)       | <input type="checkbox"/> FTTC – Fibre to the Node/SLU  |
| <input type="checkbox"/> Deploying using PON technology     | <input type="checkbox"/> FTTC – G.Fast   |
| <input type="checkbox"/> Deploying using G-PON technology   | <input type="checkbox"/> Hybrid Fibre Coax (HFC / DOCSIS 3.x)  |
| <input type="checkbox"/> Deploying using XGS-PON technology | <input type="checkbox"/> Some or all Fixed Wireless Access network<br>(please complete the FWA section of the survey<br>on page 4) |

Other (please specify)

### 2. Do you currently offer wholesale access to your fixed network?

- Yes  
 No

### 3. If you do not offer wholesale access to your fixed network do you plan on doing so in the future?

- Yes  
 No

### 4. Is your network accredited to any of the following schemes? (tick all that apply)

- INCA Gold Standard  
 UKWISPA Quality Accreditation

Other (please specify)

**5. To what extent do you use PIA in your network deployments?**

- 0
- Less than 10%
- 10 - 20%
- 20 - 50%
- 50 - 80%
- 80 - 100%

**6. How many premises do your fixed networks pass – split by residential and business?**

Note: Ofcom’s definition of “full fibre coverage” is “where the network has been rolled out to a ‘lead-in’ that will serve the consumer end premises and where the consumer would expect to pay a standard installation charge for that connection”.

	Residential	Business
End December 2021	<input type="text"/>	<input type="text"/>
Do you anticipate by end of 2022	<input type="text"/>	<input type="text"/>
Your longer-term aspiration by the end of 2025	<input type="text"/>	<input type="text"/>

Please provide your definition of “pass” if this varies to Ofcom’s and/or you use a different network technology

**7. How many end-users are connected to your fixed networks – Split by residential and business? If possible, split by wholesale and retail.**

	Residential	Business	Retail	Wholesale
End-Dec 2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
By the end of 2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
By the end of 2025	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Fixed Wireless Access Networks

Please provide further information about your current and planned fixed wireless access network coverage and end-users. Please skip to the next section if you do not deploy or use FWA technology in your infrastructure rollout.

### 1. What type of fixed wireless network do you build? (tick all that apply)

- Fixed Wireless Access using unlicensed or lightly licensed spectrum
- Fixed Wireless Access using licensed spectrum
- FWA – Point to Point
- FWA – Point to Multipoint
- Current wholesale access to your network
- Planning wholesale access to your network

Other (please specify)

### 2. How many premises are within coverage range of your fixed wireless networks – Split by residential and business?

End December 2021	<input style="width: 150px; height: 20px;" type="text"/>	<input style="width: 150px; height: 20px;" type="text"/>
Do you anticipate by end of 2022	<input style="width: 150px; height: 20px;" type="text"/>	<input style="width: 150px; height: 20px;" type="text"/>
Your longer-term aspiration by the end of 2025	<input style="width: 150px; height: 20px;" type="text"/>	<input style="width: 150px; height: 20px;" type="text"/>

Please provide your definition of “within coverage range”

### 3. How many end-users are connected to your fixed wireless networks – Split by residential and business? If possible, split by wholesale and retail.

	Residential	Business	Retail	Wholesale
End-Dec 2021	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>
By the end of 2022	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>
By the end of 2025	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>

## CapEx and OpEx

### 1. What is your overall capital expenditure?

Current financial year	<input type="text"/>
Next financial year	<input type="text"/>
Estimated spend from now until 2025	<input type="text"/>

### 2 How much do you spend on operating and maintaining the network/s?

Current financial year	<input type="text"/>
Next financial year	<input type="text"/>
Estimated spend from now until 2025	<input type="text"/>

## Challenges to Network Deployment and Service Delivery

### 1. How would you rate the following issues in terms of their challenge to your network deployment and ability to offer services to and acquire customers?

Please rate issues on a scale from 1 – ‘Not an issue’ to 5 – ‘Very significant challenge’

	Not an issue	Slight Issue	Challenge	Significant Challenge	Very significant challenge
Price increase on Openreach EAD circuits for FTTP aggregation that came into effect in early 2021	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Openreach Project Equinox scheme affecting your deployment and planning particularly regarding wholesale services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Openreach’s Equinox scheme resulting in overbuild within your current build plans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overbuild by other providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proposed price increase on PIA products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using Passive Infrastructure Access from	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Openreach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Not an issue	Slight Issue	Challenge	Significant Challenge	Very significant challenge
Delivery times for services from Openreach or other operators ((e.g. EAD circuits, PIA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to cost-effective backhaul services Attracting service providers to deliver services over your network	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to an aggregated wholesale platform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switching between Openreach and independent networks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Gigabit procurements and the tendering process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Gigabit procurements and threat of overbuild of your commercial networks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BDUK's pause on community-led ISPs Gigabit Vouchers affecting current and future deployments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engaging with developers and/or local authorities on new build housing plans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of fibre and/or equipment including import barriers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply chain delays affecting deployment plans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing prices for materials and/or equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to skills and labour within the changing market post-Brexit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Getting wayleaves	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning and street works delays and/or costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>				



**2. In your negotiations for obtaining wayleaves what is the average timeframe for the process from beginning to gaining consent?**

- Less than 6 months
- 6 – 12 months
- 12 – 18 months
- 18 – 24 months
- 2 or more years
- N/A

Please note any specific comments that you may have on the above or on other issues.

### **Project Gigabit Programme**

**1. Are you currently seeking procurement contracts via the Project Gigabit programme?**

- Yes
- No

**2. If you are participating in the Project Gigabit Programme, to what extent are you? Tick all that apply.**

- Type A: Dynamic Procurement Scheme (DPS, c1k – 8k premises)
- Type B: Large Contracts (c40k – 80k premises)
- Type C: Very Large Frameworks (c500k premises)
- Vouchers (2 or more premises)
- N/A

### **'One Touch Switching' Implementation**

**1. How would you characterise your readiness to operate in the 'One Touch Switching' market?**

- At the start of the process
- Substantially ready with most systems in place
- Completely ready

Other (please specify)

**2. Are there any additional measures or support would you like to see?**

Yes

No

If answered yes, please provide further information:

**Skills and Labour**

Please provide details, if possible, about current or potential employment issues and how they may affect your core business operations (eg. senior management, technology officers, in-office staff, customer support) along with your network deployment and maintenance operations.

**1. To the best of your ability, please rate the following employment issues in terms of their challenge to your core business operations and your network deployment and maintenance operations**

Please rate issues on a scale from 1 – 'Not an issue' to 5 – 'Very significant challenge' or 'Don't know'

	Core Business Operations	Network Deployment / Maintenance Operations
Access to qualified skills and labour to fulfil current or future expansion plans Increase cost to business	<input type="text"/>	<input type="text"/>
Repercussions from Brexit on staffing levels	<input type="text"/>	<input type="text"/>
Ongoing or future sub-contractor agreements and their ability to secure employees	<input type="text"/>	<input type="text"/>

**2. Can you provide your total number of employees and how many are you expecting to employ in the future. If possible, can you please split by core business operations and network operations?**

	Core Business Operations	Network Operations
End-December 2021	<input type="text"/>	<input type="text"/>
By end 2022	<input type="text"/>	<input type="text"/>
By end 2025	<input type="text"/>	<input type="text"/>

**3. If you have current training programmes in place, please provide an estimate of how many employees are currently enrolled in these programmes? Roughly, how many trainees do you expect to have in the future? If possible, please split by core business operations and network operations.**

	Core Business Operations	Network Operations
End-December 2021	<input type="text"/>	<input type="text"/>
By end 2022	<input type="text"/>	<input type="text"/>
By end 2025	<input type="text"/>	<input type="text"/>

**4. Please provide any further information about your training programmes below:**

**5. Are you currently implementing, or do you have future plans to promote diversity in the workplace?**

- Yes
- No
- None currently in place, considering workplace diversification projects in the future

**6. Please provide any further information about any workforce diversification initiatives you have or may be putting into place in the future and provide a URL address of your plans if possible.**

### **Net Carbon Zero Transition**

Please provide further information about your current and/or future projects to meet the Net Carbon Zero agenda.

**1 Do you currently have any initiatives or programmes in place to support the Net Zero / ESG agendas?**

Yes

No

**2. If yes are your programmes supporting:**

Scope 1 Direct emissions

Scope 2 Power-related emissions

Indirect emissions (e.g. value/supply-chain related)

N/A

Please provide a URL address of your Net Carbon Zero projects and/or policies.  
Alternatively, they can be emailed to [surveys@inca.coop](mailto:surveys@inca.coop)

## Postcodes/UPRN Data

In line with our approach to providing clear, up to date and accurate data, it is very important to gather robust information that can be aggregated to influence Ofcom's and the government's understanding of the sector.

**1. Do you hold your network plan at postcode and/or UPRN level? Please tick the relevant box below.**

Postcode

UPRN

**2. Please provide existing coverage and intended build postcodes/UPRN premises data, ideally up to April 2026. These will be used by INCA on an aggregated basis in its response to Ofcom.**

The preferred format is an Excel sheet listing coverage data split by present and future (by year if available), if possible noting maximum speeds available to end-users in each location if this varies – email to [surveys@inca.coop](mailto:surveys@inca.coop) or tick the option below to be contacted by us.

In addition, Point Topic would like to use the aforementioned data in order to map the coverage of broadband networks. It works with thinkbroadband to do this and therefore shares this data with its partner accordingly, tick here if you are happy for your data to be shared.

Please contact me

I agree for my network coverage to be shared with Point Topic and thinkbroadband for network forecasting and mapping purposes

## INCA Services

**1. Is there anything that INCA is not doing that you think we should put resources into?**

## Done – Thank You

## 13. Annex 1

### Selected independent network operator investment announcements January 2021 to March 2022

Date	Operator	Investment	FTTP Deployment Aims
Jan-21	N/A	No public announcements regarding securing financial investment made by AltNets.	
18-Feb-21	<b>Lightspeed Broadband</b>	Secured £55m in equity commitments from AtmosClear Investments and Kompass Kapital with opportunity to increase to £300m as building progresses.	Aims to pass 1 million premises by 2025.
25-Feb-21	<b>MS3 Networks</b>	Announced £3.5m investment in a city-wide expansion of a second fibre network in Hull.	Aims to pass 500k premises by 2025.
15-Mar-21	<b>Lit Fibre (formerly Broadreach Networks)</b>	£3m in opening shares, but additional funding via Newlight Partners LP.	Aims to pass 500k premises by 2026.
25-Mar-21	<b>Voneus</b>	Macquarie Capital increase ownership stake, with original commitment of £10m in 2019 with potential to increase to £30m.	New investment is spurring expansion plans from 900k to 1.6m premises.
14-Apr-21	<b>Borderlink</b>	Received £10.5m in funding from BSIF.	Aims to shift FWA focus to 10 Gbps capable FTTP network for homes and businesses in the Scottish borders and northern England.
26-Apr-21	<b>Cuckoo</b>	Secured £4.3m in funding from RTP Global with participation from JamJar Investment.	
01-Jul-21	<b>Telcom Group</b>	Secured £63m from Gresham House.	Plans to cover 1 million premises by the end of 2023.
05-Aug-21	<b>Grain</b>	Secure £75m equity investment from Equitix.	Increase target to pass 300k premises.
20-Aug-21	<b>Trooli</b>	Secured £67.5m senior debt facility via a consortium of commercial lenders, facilitated by the Connecting Europe Broadband Fund (CEBF).	Increases coverage plans to reach 1 million premises in the South East of England by 2024.
31-Aug-21	<b>Axione Fibre</b>	Secured £300 in funding supported by its shareholders Bouygues Energies and Services and Vauban Infrastructure Partners	Aims to cover 4 million UK premises.
02-Sep-21	<b>Full Fibre Ltd</b>	Undisclosed amount from Basalt Infrastructure.	Announced an additional 13 market towns across Derbyshire, Staffordshire, West Yorkshire, and Nottinghamshire in addition to the 11 released in March 2021. Currently on track to reach 250k premises by 2022 with goal of 500k by 2025.
14-Sep-21	<b>Freedom Fibre</b>	Backed by TalkTalk.	Aims to connect more than 130,000 TalkTalk subscribers in northwest England. Short term aims are 50k premises by mid-2022 increasing to 100k by end-2022.
16-Sep-21	<b>Upp</b>	June 2021 secured £1bn via LetterOne, the management team, and the Board of Directors, £300m in equity and the rest as debt.	Full fibre deployment plan with aim of passing 300,000 premises by 2022 and 1 million homes in England by 2025; network live in Lincolnshire and Norfolk.
16-Sep-21	<b>CityFibre</b>	Secured £1.125bn in its latest capital raise.	Underpins rollout to up to 8m homes across 285 cities, towns and villages by 2025.

Date	Operator	Investment	FTTP Deployment Aims
20-Sep-21	Connexin	£80m .	Full fibre network expansion in Hull in a bid to end KCOM's monopoly.
04-Oct-21	Zzoomm	Secured an additional £100m from a consortium of international banks led by ING Bank, with Hamburg Commercial Bank and Kommunalkredit Austria (bringing the total to £200m).	Accelerating their expansion across Oxfordshire, Berkshire, Herefordshire and North Yorkshire. Aims to cover 1 million homes across 85 UK towns with 2Gbps FTTP by the end of 2025.
06-Oct-21	Broadway Partners	Secured £145m investment from Downing LLP.	FTTP network expansion to reach 250k premises rural parts of Scotland and Wales by 2025.
27-Oct-21	Voneus	Backed by Macquerie up to £30m.	Acquired Solway Communications and deploying FTTP network; aims of passing 100k premises in near future, ultimate goal is 1.6m.
15-Nov-21	Netomnia	Secured £123m of funding from ESO Capital Partners UK LLP, AdvenCap, Avenue Capital Group.	Aims to pass 1m premises by 2023; February 2022 footprint covers c. 90k premises.
29-Nov-21	MS3 Networks	Announced unspecified funding sum from Asterion Industrial Partners.	Increasing rollout to 500k premises in Hull; February 2021 invested £3.5m in city-wide network expansion.
10-Dec-21	Lightspeed Broadband	Secured an additional £60m investment from Sequoia Economic Infrastructure Income Fund.	Aims to pass 1m premises by 2025.
15-Dec-21	Digital Infrastructure	Received £100m investment from Basalt.	Aims to pass 1m premises in 80 towns and cities by 2027.
17-Dec-21	Gigaclear	Secured £190m facility provided by ING, ABN Amro, ING, Lloyds Bank, NatWest, NIBC and UKIB.	Has passed 250k rural premises and aims to reach 500k by 2023.
21-Dec-21	Full Fibre Ltd.	Secured a financing deal with Basalt.	Aims to cover "at least" 500,000 UK premises by 2025.
22-Dec-21	Toob	Secured £87.5m from the Sequoia Economic Infrastructure Income Fund.	Aims to pass 1m premises by 2027.
04-Jan-22	Truespeed	Secured additional £100m in funding from Aviva.	Aims to pass 500k premises by 2025.
05-Jan-22	Lothian Broadband	Received £20m in funding from SNIB.	Increased target rollout to 70k premises up from 50k.
10-Jan-22	Borderlink	Secures additional £164m from BSIF.	Target rollout increased from 100k to 500k premises by end of 2024/start of 2025.
27-Jan-22	Community Fibre	£400m (2020) from Warburg Pincus	Jan 2022 announced increasing 1m premises target to 2.2m London homes by end of 2024.
21-Mar-22	CityFibre	£300m additional investment secured from Mubadala Investment Company, a total of £1.425bn in investment announcements since Sept 2021.	This equity investment will support CityFibre's accelerated growth plans and enable participation in Building Digital UK's (BDUK) 'Project Gigabit' rural programme.
31-Mar-22	Fibrus	£200m secured from a consortium of banks, including the UK Infrastructure Bank.	Aims to cover 300k premises in 118 regional towns in Northern Ireland and North East England by 2024.

Source: Independent operators' public announcements

**A Point Topic report for INCA**

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