Cheshire and Warrington
Local Enterprise Partnership

Digital Connectivity Board

June LEP Board Discussion

Connectivity and Infrastructure: Digital Connectivity

The board and delivery area are still in the "Establish" phase.

| Influence and Networking	Cementing and establishing partnership networks within the sub-region and neighbouring regions.	
	↳ Define a governance structure, alongside the local authorities and Connecting Cheshire, of digital across the sub-region.	Q1
	↳ Establish new governance structure.	Q2
	Identification and alignment of priorities:Rural connectivity plan, Business requirements, Digital infrastructure plan review (data refresh):	
	↳ Gap analysis assessment for digital connectivity in the sub-region.	Q2
	↳ Recommendation to Strategy Programme Board for the Growing Places Fund, for priority business case areas to support.	Q3
	Exploration of commercial models and funding streams: Opportunities and timescales of BDUK, Pipeline of public sector "backbone" schemes, Identification of "dig once" opportunities, Levelling up pitch:	
	↳ Working with the local authorities and Connecting Cheshire to develop sub-regional options for Digital Connectivity improvements for levelling up, for consideration for a County Deal / Levelling Up submission.	Q1
	↳ Gain further market support and facilitate engagement on the emerging levelling up proposal for the sub-region on digital connectivity.	Q3
	↳ Define pipeline proposal for "backbone" and "dig once" schemes.	Q4

Cheshire Superfast and Fibre Coverage
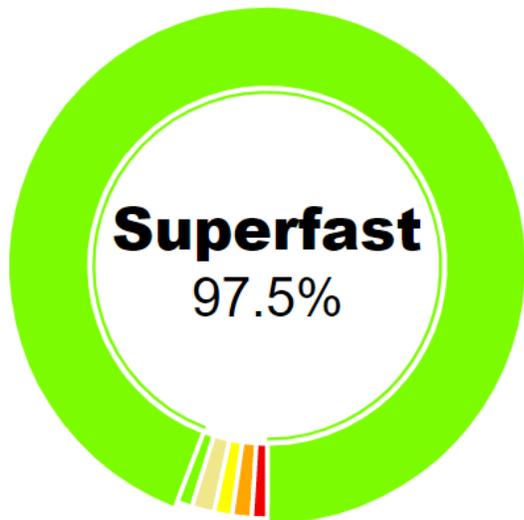
Latest Figures | History | ?

Superfast
97.5%

Superfast (>24 Mbps):	**97.80%**	Below 2 Mbps down:	**0.33%**
Superfast (>=30 Mbps):	**97.46%**	Below 10 Mbps down: (Legal USO)	**0.94%**
Gigabit (DOCSIS 3.1 or FTTP):	**58.81%**	Below 10 Mbps, 1.2 Mbps up:	**1.12%**
Full Fibre (FTTP or FTTH):	**27.37%**	Below 15 Mbps: (High Speed Broadband)	**1.40%**
Alt Net FTTP: FTTP excluding Openreach, KCOM and Virgin Media RFOG	**1.13%**	Ultrafast (>100 Mbps):	**65.55%**
Openreach FTTP:	**24.21%**	Virgin Media Cable:	**36.93%**
'Fibre' partial/full at any speed: (FTTC/VDSL/G.fast/Cable/FTTP)	**99.55%**	Openreach (>30 Mbps):	**96.33%**
		Openreach G.fast:	**10.44%**

Cheshire Speed Test Results (Mbps)

Last Quarter | History

Any | ADSL | FTTC | Cable | FTTH | 3G/4G

ADSL, ADSL2+, FTTC, fibre, cable, mobile and wireless speeds | ?

Technology Split: ADSL 11.4% FTTC 56.3% Cable 17.7% FTTH 14.5%
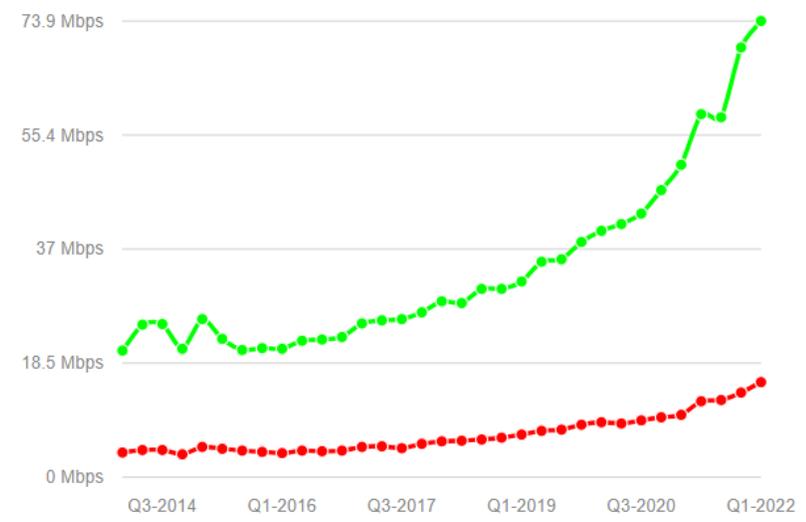
Estimated Maximum Mean Download Speed: **441 Mbps**

This figure is based around everyone buying the fastest Virgin Media, KC or Openreach product available to them, based on current product availability. Distance limitations of ADSL2+ and VDSL2 are factored into the calculation.

Speed test results are based on the analysis of results from our speed test or partners who use our speed test service. We believe this is the largest analysis of crowd sourced speed test data for the UK and the technology splits by area help to show what the public is experiencing for the different types of services across the UK.

| Latest Figures | History | ? |
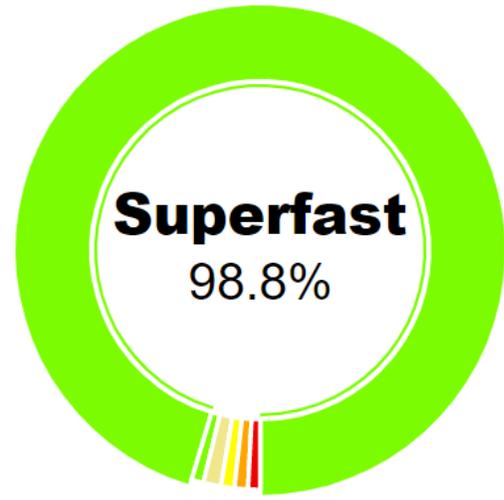
Superfast 98.8%

Authority classed as Other Urban (OU) ?

Superfast (>24 Mbps):	**98.97%**	Below 2 Mbps down:	**0.07%**
Superfast (>=30 Mbps):	**98.84%**	Below 10 Mbps down: (Legal USO)	**0.29%**
Gigabit (DOCSIS 3.1 or FTTP):	**84.70%**	Below 10 Mbps, 1.2 Mbps up:	**0.50%**
Full Fibre (FTTP or FTTH):	**20.51%**	Below 15 Mbps: (High Speed Broadband)	**0.49%**
Alt Net FTTP: FTTP excluding Openreach, KCOM and Virgin Media RFOG	**0.47%**	Ultrafast (>100 Mbps):	**86.31%**
Openreach FTTP:	**15.47%**	Virgin Media Cable:	**71.33%**
'Fibre' partial/full at any speed: (FTTC/VDSL/G.fast/Cable/FTTP)	**99.66%**	Openreach (>30 Mbps):	**97.14%**
		Openreach G.fast:	**12.05%**

Coverage percentages include both residential and business premises and is based around postcode level

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| Last Quarter | History |

| Any | Openreach | ADSL | FTTC | Cable | FTTH | 3G/4G |

ADSL, ADSL2+, FTTC, fibre, cable, mobile and wireless speeds ?

Technology Split: ADSL 10.6% FTTC 44.7% Cable 34.1% FTTH 10.6%

Q4-2020
Mean Download: 63.2 Mbps
Mean Upload: 12.3 Mbps

115.9 Mbps · 86.9 Mbps · 58 Mbps · 29 Mbps · 0 Mbps

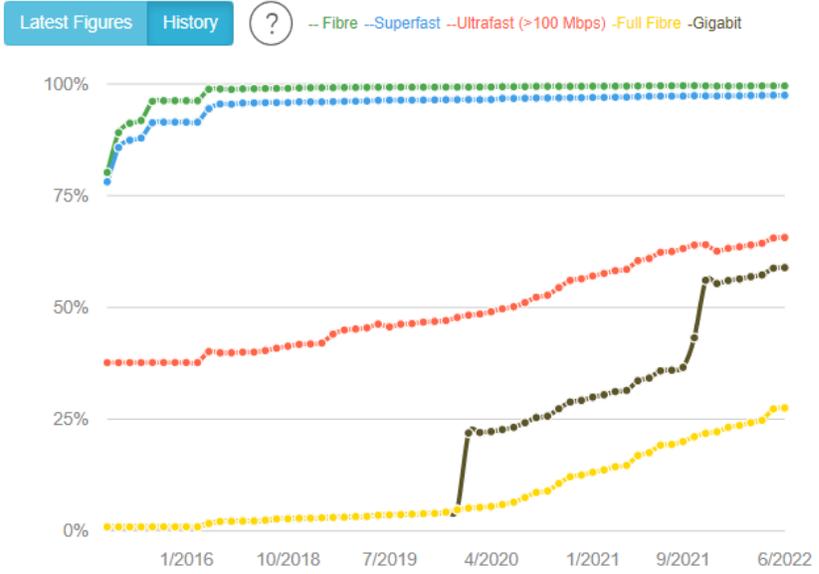Q4-2010 Q1-2013 Q2-2015 Q3-2017 Q4-2019 Q1-2022

Estimated Maximum Mean Download Speed: **509 Mbps**

This figure is based around everyone buying the fastest Virgin Media, KC or Openreach product available to them, based on current product availability. Distance limitations of ADSL2+ and VDSL2 are factored into the calculation.
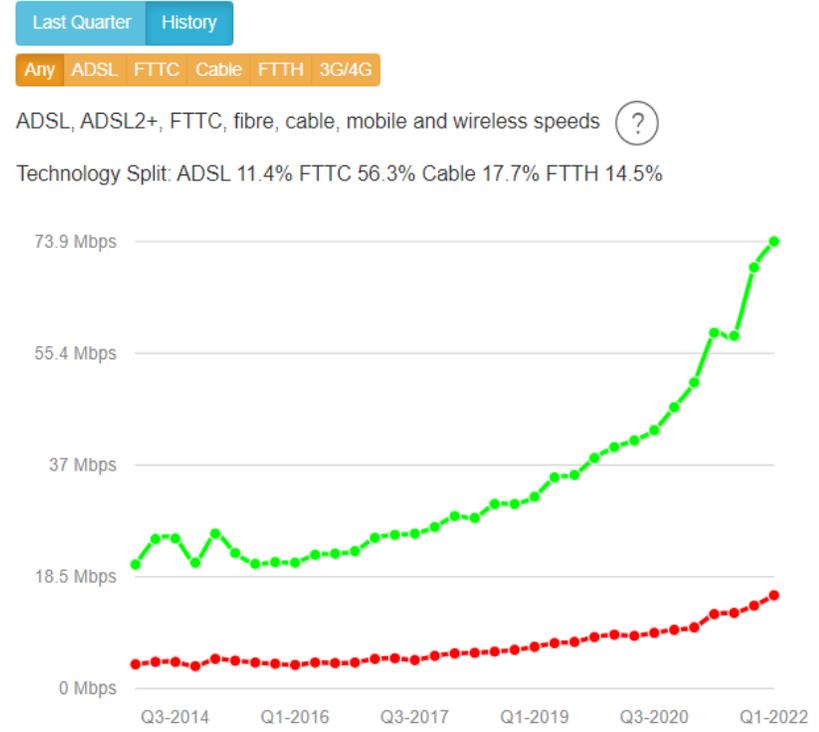
Speed test results are based on the analysis of results from our speed test or partners who use our speed test service. We believe this is the largest analysis of crowd sourced speed test data for the UK and the technology splits by area help to show what the public is experiencing for the different types of services across the UK.

Cheshire Superfast and Fibre Coverage

Latest Figures | History | ? | --Fibre --Superfast --Ultrafast (>100 Mbps) -Full Fibre -Gigabit

Superfast (>24 Mbps):	**97.80%**	Below 2 Mbps down:	**0.33%**
Superfast (>=30 Mbps):	**97.46%**	Below 10 Mbps down: (Legal USO)	**0.93%**
Gigabit (DOCSIS 3.1 or FTTP):	**58.90%**	Below 10 Mbps, 1.2 Mbps up:	**1.12%**
Full Fibre (FTTP or FTTH):	**27.52%**	Below 15 Mbps: (High Speed Broadband)	**1.40%**
Alt Net FTTP: FTTP excluding Openreach, KCOM and Virgin Media RFOG	**1.13%**	Ultrafast (>100 Mbps):	**65.63%**
Openreach FTTP:	**24.37%**	Virgin Media Cable:	**36.87%**
		Openreach (>30 Mbps):	**96.34%**
'Fibre' partial/full at any speed: (FTTC/VDSL/G.fast/Cable/FTTP)	**99.55%**	Openreach G.fast:	**10.43%**

Cheshire Speed Test Results (Mbps)

Last Quarter | History

Any | ADSL | FTTC | Cable | FTTH | 3G/4G

ADSL, ADSL2+, FTTC, fibre, cable, mobile and wireless speeds | ?

Technology Split: ADSL 11.4% FTTC 56.3% Cable 17.7% FTTH 14.5%

Estimated Maximum Mean Download Speed: **442 Mbps**

This figure is based around everyone buying the fastest Virgin Media, KC or Openreach product available to them, based on current product availability. Distance limitations of ADSL2+ and VDSL2 are factored into the calculation.

Speed test results are based on the analysis of results from our speed test or partners who use our speed test service. We believe this is the largest analysis of crowd sourced speed test data for the UK and the technology splits by area help to show what the public is experiencing for the different types of services across the UK.

Connectivity & Infrastructure: Digital Connectivity

Millenials, Generation Z ("Digital Natives")	
• 1995 – founding of Amazon, Yahoo and Ebay • 2000 – Dotcom boom • 2004 - First Sat Nav / GPS location So What? Digital Natives (those that grew up with the internet) are entering the workforce now. Greater variety of social media accounts More gaming More Smartphone use https://www.ofcom.org.uk/__data/assets/pdf_file/0025/217834/adults-media-use-and-attitudes-report-2020-21.pdf	

Connectivity & Infrastructure: Digital Connectivity

Imagination (or is it?)	
- Ordering a driverless, autonomous bus or taxi by mobile phone anytime, anywhere. - Monitoring a patient or vulnerable person remotely including provision of voice services, chatbots. - A personal device or room sensor that alerts emergency services to "critical" changes in body condition. - GPS locator for emergency services. - Biometric identification - Receiving twin factor authentication codes to a mobile to authorise payment transactions - Personalised TV, advertising and streaming services - Personalised and virtual retail offers - Remote control of supply and demand - Digital management of livestock, feed, yield, water supply / irrigation, fertiliser levels. - Labour shortages driving technological advances - Expansion of the "metaverse" – growth in Virtual and Augmented Reality for work, commercial and social interaction	

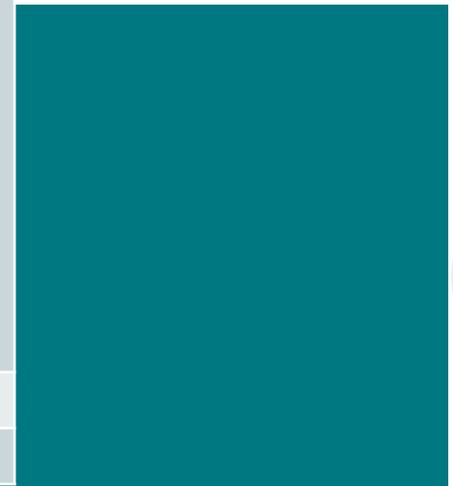## Connectivity & Infrastructure: Digital Connectivity

Barriers	
• Infrastructure	
• Funding	
• Planning – cabling installation, siting of masts, satellite receivers?	
• Affordability of devices and connections	
• Skills	
➢ Decision makers	
➢ Community at Large	
➢ Coders, Developers	
• Speed of change	
• Risk of "Silo" thinking	

Connectivity & Infrastructure: Digital Connectivity

Our ask of the board today

Who are we "doing this for"? – residents, businesses

We are seeking to prioritise needs, not technologies. How can you help us evidence those needs?

What type of conversations should we be having?

How do we avoid "silos"?

Connectivity & Infrastructure: Digital Connectivity

Further Questions		
What criteria we might employ to prioritise infrastructure investment? How do we encourage people to adopt and adapt to use the digital infrastructure provided? How do we raise awareness to the power of digital to change ways of working? How do we raise awareness more generally? How do we overcome the limitations of our resources to develop digital? What "power" do we have – financial, networks, communities, planning conditions?		