

# The Connectivity Challenge

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# Highlands and Islands (HIE) Superfast and Fibre Coverage

Latest Figures History ?



Superfast UK (>24 Mbps):	<b>80.33%</b>	Below 2 Mbps down:	<b>4.33%</b>
Superfast EU (>30 Mbps):	<b>78.94%</b>	Below 10 Mbps down:	<b>14.00%</b>
Ultrafast (>100 Mbps):	<b>0.67%</b>	Below 10 Mbps, 1 Mbps up: (Legal USO)	<b>15.23%</b>
Openreach (>30 Mbps):	<b>78.93%</b>	Below 15 Mbps: (High Speed Broadband)	<b>16.68%</b>
Openreach FTTP:	<b>0.66%</b>	Virgin Media Cable:	<b>0.00%</b>
Openreach G.fast:	<b>0.00%</b>	Full Fibre (FTTP or FTTH):	<b>0.67%</b>
'Fibre' partial/full at any speed: (FTTC/VDSL/G.fast/Cable/FTTP)	<b>91.47%</b>		

Coverage percentages include both residential and business premises and is based around postcode level data. The speed available are determined by a model that reconstructs the Openreach exchange/cabinet based network, and takes into account the distance limitations of ADSL2+ and VDSL2/G.fast (FTTC) services.

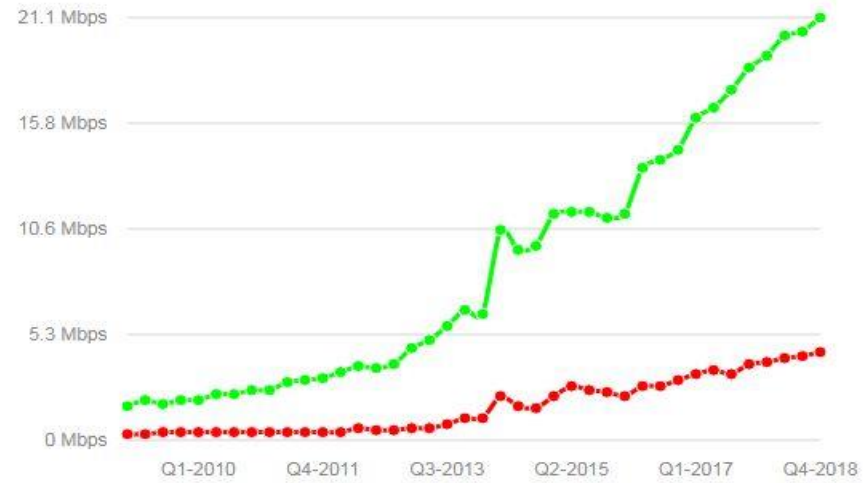
The use of an independant model constructed and continually updated as the network roll-outs continue is different to the methodology used by Ofcom which is reliant on data provided by broadband providers. By running our model we are able to provide a verification for the Ofcom data and are not reliant on quarterly data releases but can update data on a daily or weekly basis as needed. The largest factor for any differences with the Ofcom analysis is down to the timing of publication.

# Highlands and Islands (HIE) Speed Test Results (Mbps)

Last Quarter History  
 Any ADSL FTTC Cable FTTH 3G/4G Sat

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

Technology Split: ADSL 45.9% FTTC 53.5% FTTH 0.6%



Estimated Maximum Mean Download Speed: **40 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.

## Geographic 4G coverage from all operators across the UK

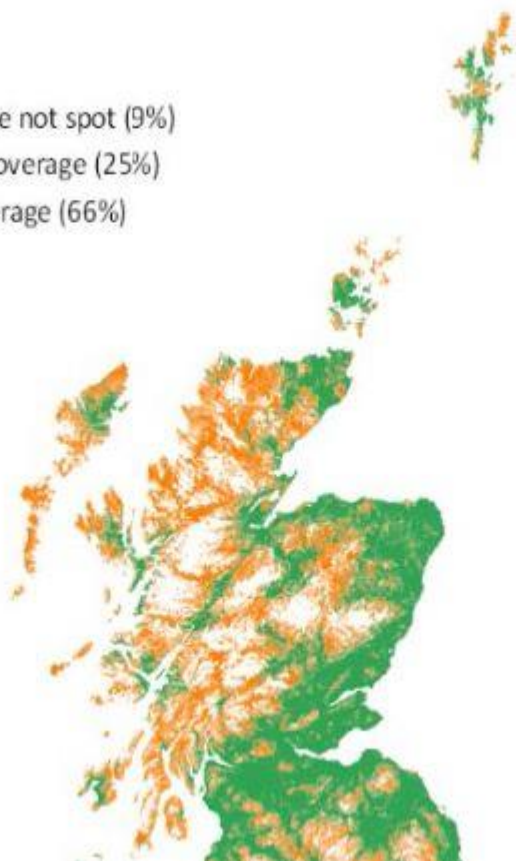
Nations	All	Rural	Urban
England	82%	79%	98%
Northern Ireland	79%	78%	93%
Scotland	38%	37%	96%
Wales	57%	53%	89%

*Source: Ofcom analysis of operator data, September 2018*

## Complete and partial 4G not-spots

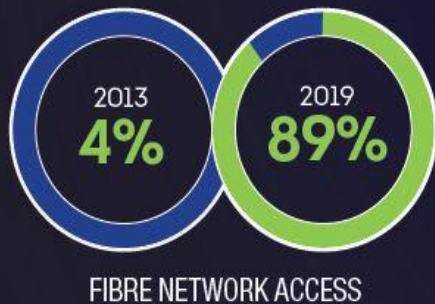
### Legend

- Complete not spot (9%)
- Partial coverage (25%)
- Full coverage (66%)



**There are 12,000 premises in Scotland that do not have coverage from either decent fixed or good 4G mobile**

# DIGITAL HIGHLANDS AND ISLANDS



# Broadband Take-Up

<b>Local Authority</b>	<b>% Take Up</b>
Argyll and Bute	53.21%
Arran and Cumbrae	55.14%
Highland	54.56%
Moray	53.67%
Orkney Islands	48.59%
Shetland Islands	57.74%
Western Isles	62.53%
<b>Grand Total</b>	<b>54.67%</b>



# Reaching 100%

- Large scale, high value national procurement
- Complex, multiple bidders, variety of business models
- Exciting potential – full fibre
- Extended implementation period inevitable

# Other Projects

- Private wireless providers
- BT's 21CN – ADSL2+ (up to 20Mbps)
- Universal Service Obligation – 10Mbps or better on request
- Mobile Infill – S4GI
- Satellite Broadband
- Local Full Fibre Network – Inverness, Fort William, Wick and Thurso
- Internet of Things (IoT)



# The Connectivity Opportunity?

Which one are you?



1/2 FULL?



1/2 EMPTY?



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