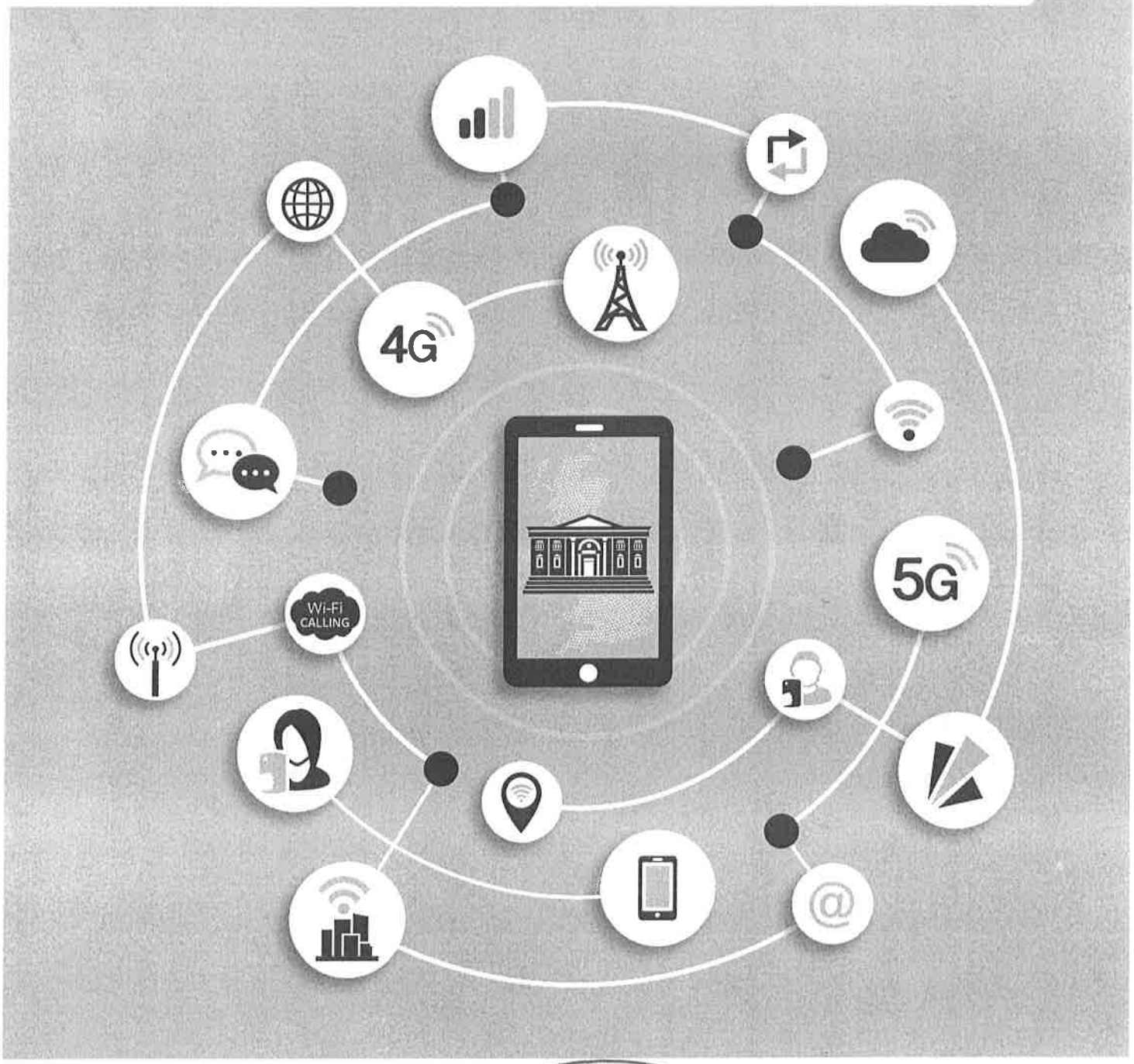
COUNCILS & CONNECTIVITY

How local government can help to build mobile Britain

September 2018

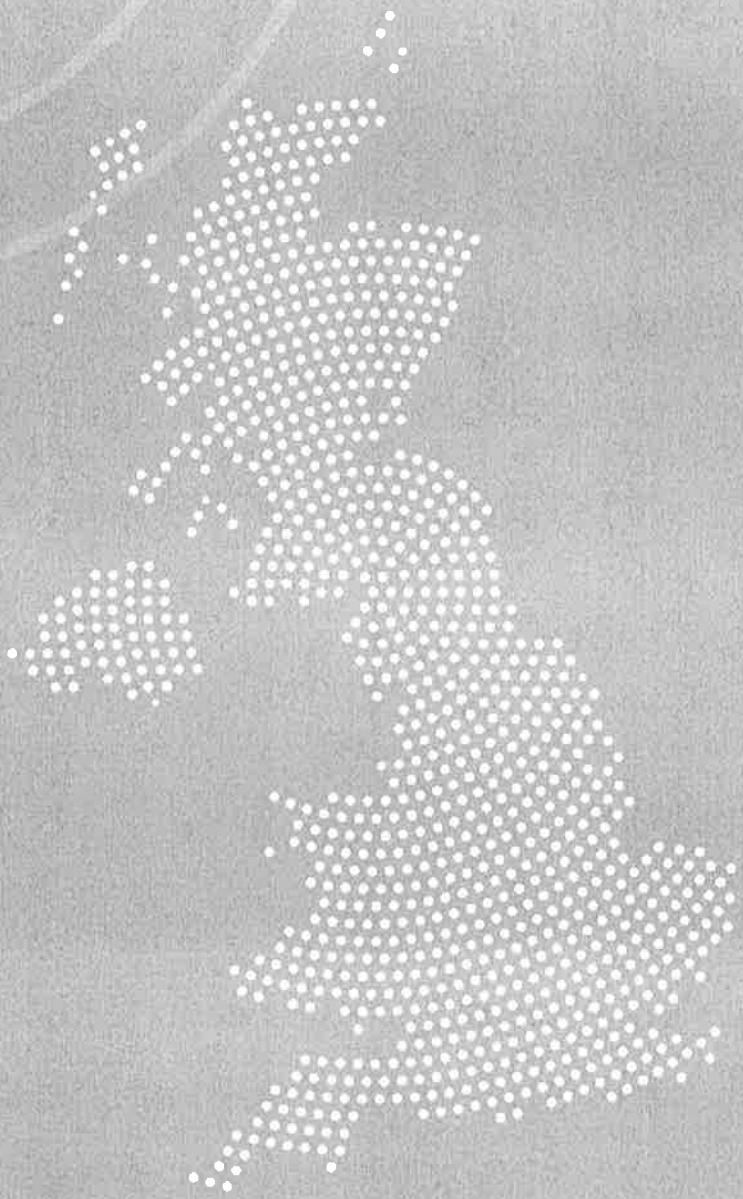


BUILDING MOBILE BRITAIN

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Registered in England & Wales No. 09998063

92%

of UK premises have mobile services from all four operators.

(Ofcom)

According to the *Future Connectivity Challenge Group*, the UK's leadership in **5G** could result in the opportunity to create

£173 billion

of incremental UK GDP growth over a ten-year period from **2020** to **2030**.

Mobile data use predicted to rise to

90gb per month by **2025**.

(Three UK customer prediction based on Ofcom Mobile Data Strategy, 2016)

Average monthly user data consumption

1.9gb in **2017**.

(Ofcom)

£2 billion

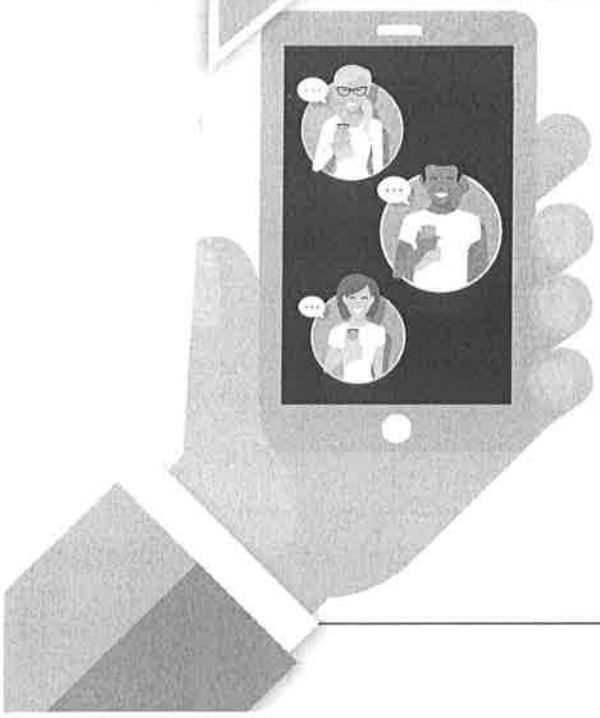
mobile operators **annual investment** in new network infrastructure.

(Mobile UK)

92 million

active mobile subscribers.

(Ofcom, Communications Market Report, 2018)



18%

the proportion of adults who live in a **mobile-only** home.

(Ofcom, Fast Facts, 2017)

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About Building Mobile Britain

Building Mobile Britain is a campaign that supports the mobile industry's collaboration with national and local government, regulators, industry, consumers and citizens to overcome the challenges to expanding mobile networks, whilst also developing innovative services for customers.

Building Mobile Britain is run by Mobile UK, the trade association for the UK's mobile network operators – EE, O2, Three and Vodafone. The mobile network operators are determined to continually improve and to expand the UK's mobile capacity.

For further information about Building Mobile Britain visit: **http://www.buildingmobilebritain.org.uk**

For further information on the work of Mobile UK visit: **http://www.mobileuk.org/**

BUILDING MOBILE BRITAIN

Mobile UK

About this publication

This document outlines the mobile industry's view on how local government can create an environment that is conducive to the building of mobile infrastructure. It has been written so as to be relevant to all tiers of local government – and to any body interested in local economic development. The analysis and recommendations included in the following chapters have been developed from desk research and conversations with representatives of the mobile industry and local government. Thanks go to those who took the time to help inform the content of this publication. This report was produced by Policy Points, a research organisation specialising in evidence based policy making.

The need for mobile industry and local government collaboration

The UK's mobile connectivity is getting better and better. Indoor call coverage from all four mobile networks is now available in 92% of UK premises; data coverage from all operators is now available in 88% of UK premises.[i] This has been achieved by the mobile industry investing billions of pounds every year into network capacity, coverage and capability.

The investment in mobile infrastructure will continue and it will evolve. Just as the use of 4G mobile technology becomes widespread, the adoption and use of 5G mobile technology needs to be planned and implemented. Getting this right is important for three reasons:

1. **Mobile connectivity is essential to the future success of the economy.** The combined value of 4G and 5G mobile connectivity is estimated to add £18.5bn to the economy by 2026.[ii]
2. **Mobile connectivity is essential to creating a better society.** Digital inclusion can help people gain employment, become more financially secure and improve health and well-being.[iii]
3. **Mobile connectivity is essential to fulfilling the potential of new technologies.** Innovations such as Artificial Intelligence and connected cars will change how we work, spend our leisure time and run our public services.[iv]

The mobile industry has been able to enhance mobile connectivity across most of the country. But there is more to be done:

- There is demand for mobile connectivity in areas where geography, logistics or economics – or a combination of all three – make it difficult.
- Mobile network capacity needs to grow to meet the demand of mobile users, who are consuming ever increasing amounts of data.

Local government has a key role in addressing these issues because the mobile industry cannot address them alone. Therefore, this report makes recommendations and offers guidance for how mobile network operators and local government can collaborate to create an environment that encourages the build of mobile infrastructure. The recommendations and guidance are presented under three themes:

- **Adopting a proactive approach** – Leadership and political will can provide impetus that improves the mobile connectivity outcomes for residents.
- **Planning for the long-term** – Because of its importance to economic outcomes, mobile connectivity needs embedding into every aspect of local government's strategic thinking.
- **Build partnerships and share best practice** – The full potential of mobile connectivity cannot be realised unless there is collaboration and exchange of ideas.

The recommendations and guidance under these themes have been designed so that they can be applied despite significant financial pressures faced by local government, e.g. Local Authority spending on planning and development services fell by more than 50% in real terms between 2011-12 and 2016-17.[v]

It is important to note that alongside the recommendations made in this report other improvements are required to streamline network rollout – such as reduced regulatory burdens, a consistent planning regime, and a supportive tax system. As such, while the recommendations discussed in this document will provide opportunities to improve the environment mobile operators and local government work within, they are not guarantees to enhance connectivity and coverage.

1

ADOPT A PROACTIVE APPROACH

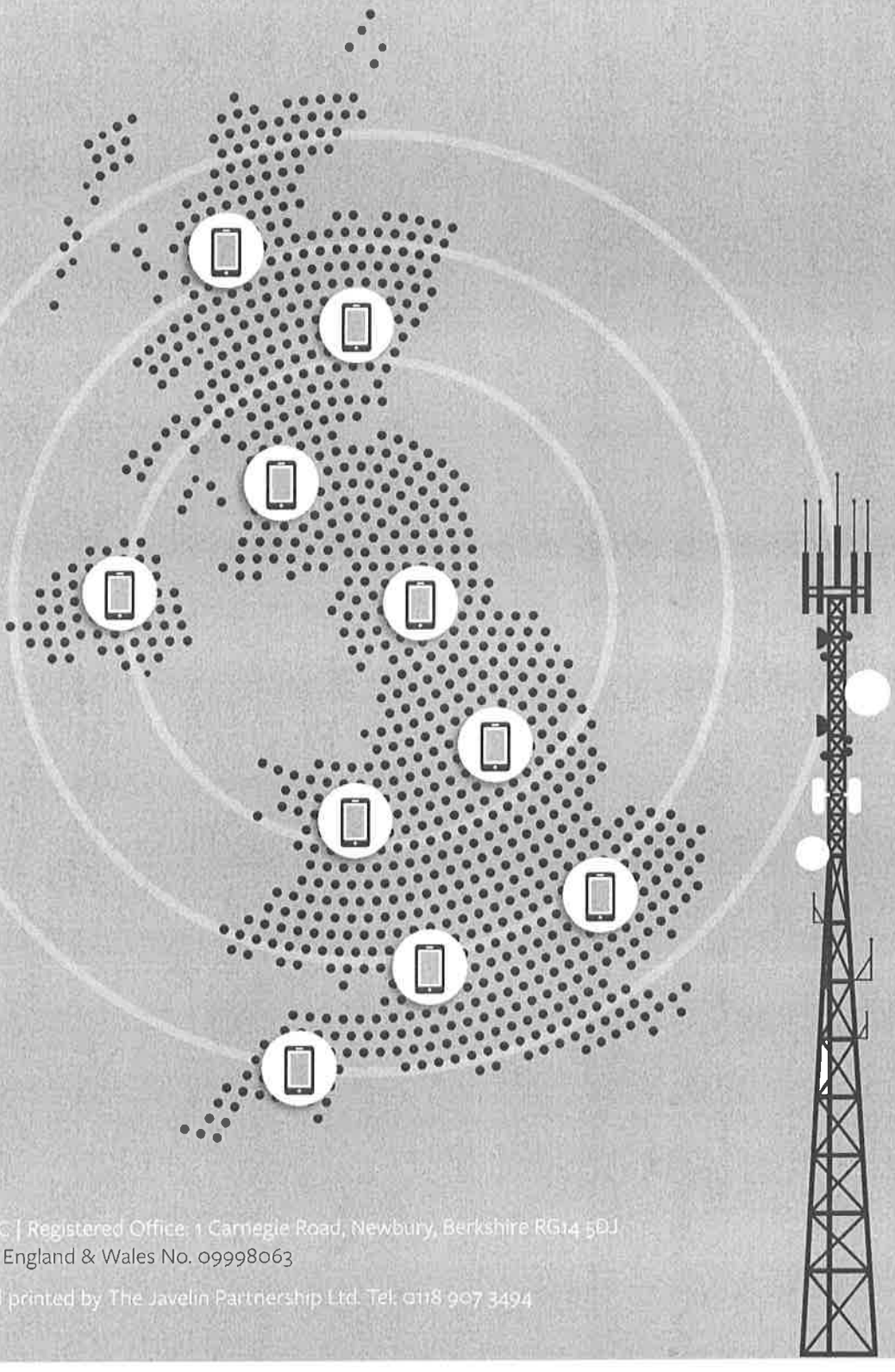
Local government can create the right environment to improve mobile connectivity by:

1. **Showing leadership and political will.** Local government should see mobile connectivity as a way to improve the lives of residents and not just as a way to raise revenue. There are numerous examples of how different local organisations – combined authorities, local authorities and local enterprise partnerships (LEPs) – have promoted the economic and social benefits that flow from good mobile connectivity.
2. **Creating local government 'digital champions'.** This could be a Local Authority cabinet post or committee focussed on mobile connectivity, a senior role dedicated to making better use of mobile/digital technology (such as a Chief Digital Officer) or a council officer with responsibility to improve mobile connectivity. Equally, when local government is a proactive user of mobile technology it is more likely to be a proactive enabler of mobile technology.
3. **Providing training to ensure appropriate skills and knowledge.** A key example of this is ensuring planning officers are aware of the requirements of mobile infrastructure. In the past, mobile operators have played their part by providing local planning authorities with professional development workshops on technological and other advances within telecommunications.
4. **Lobbying to remove the barriers to mobile infrastructure deployment.** Local government can use its influence to improve the environment for investment in mobile infrastructure. For example, if a planning regulation is thought to act as a barrier to the deployment of mobile infrastructure, local government should make representations to the Ministry of Housing, Communities and Local Government.



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