Councils & Connectivity

How local government can help to build mobile Britain

September 2018

BUILDING MOBILE BRITAIN

Mobile UK

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BRITAIN

Mobile UK 21C | Registered Office: 1 Carnegie Road, Newbury, Berkshire RG14 5DJ
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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/**

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.

When local government is proactive it can catalyse significant change and improvement. This has been demonstrated by metro mayors, who have set clear priorities in policy areas such as transport and housing. It has also been demonstrated by the successful campaigns run by local authorities, examples of which have addressed issues such as fly-tipping and poor public health outcomes.[vi]

The four recommendations above have been inspired by existing examples of local government proactivity on mobile connectivity, some of which are as follows:

1. **Showing leadership and political will.** Some metro mayors have developed – or have started to develop – ambitious digital strategies that include mobile. Some councils – as set out in the cases studies in this document – have committed financial resources to mobile connectivity. Some LEPs have funded programmes related to mobile connectivity.
2. **Creating local government 'digital champions'.** Survey evidence has found that around half of councils have a cabinet member that champions digital issues.[vii] London has a Chief Digital Officer, and the West Midlands and Tees Valley combined authorities have stated intentions to hire one. Collaborations between local bodies – such as "Connecting Cambridgeshire" – are helping to drive a digital agenda. Norfolk County Council has a Digital Innovation and Efficiency Committee.
3. **Providing training to ensure appropriate skills and knowledge.** Some local authorities have job roles based upon improving mobile connectivity. Others have hired staff with experience in the telecommunications industry and have lent neighbouring councils this expertise.
4. **Lobbying to remove barriers to mobile infrastructure deployment.** The remit of the DCMS's Barrier Busting Taskforce is to tackle the barriers to the rollout of full fibre and mobile equipment. Action has been identified as reducing the cost of street works, liberalising the planning regime and simplifying wayleave agreements. The Taskforce was only able to identify some barriers to rollout because key stakeholders made representations to them.[viii]

The above approaches demonstrate that is not just the most senior within a local government organisation that can be proactive in changing the environment for investment in mobile infrastructure. Indeed, previous research on the local government workforce has convincingly argued for a cultural shift towards allowing more junior members of staff to take initiative and make decisions.[ix]

CASE STUDY

Cambridgeshire & Peterborough Combined Authority – Setting a clear direction

The Connecting Cambridgeshire digital programme – which has had notable success in rolling out superfast broadband – is being extended to generate further improvements to mobile, broadband and public wi-fi coverage. It is a proactive approach, which not only seeks to understand the barriers that prevent mobile connectivity from being improved, but also aims to break those barriers down.

The programme has political support from the mayor and a fully-funded and dedicated delivery team. The team is called the Enabling Digital Delivery (EDD), and it will support plans for full fibre networks, 5G mobile and improvements to mobile coverage. The intention is to improve network coverage across the whole geography of the county – including A and B roads, and rail services by 2022.

The EDD has several other responsibilities that will support it in its aims to improve mobile connectivity. These are: developing relationships with mobile network operator working across multiple public sector bodies and boundaries; and, being the point of contact to coordinate wayleaves, street works licences and planning, and making public sector assets available.

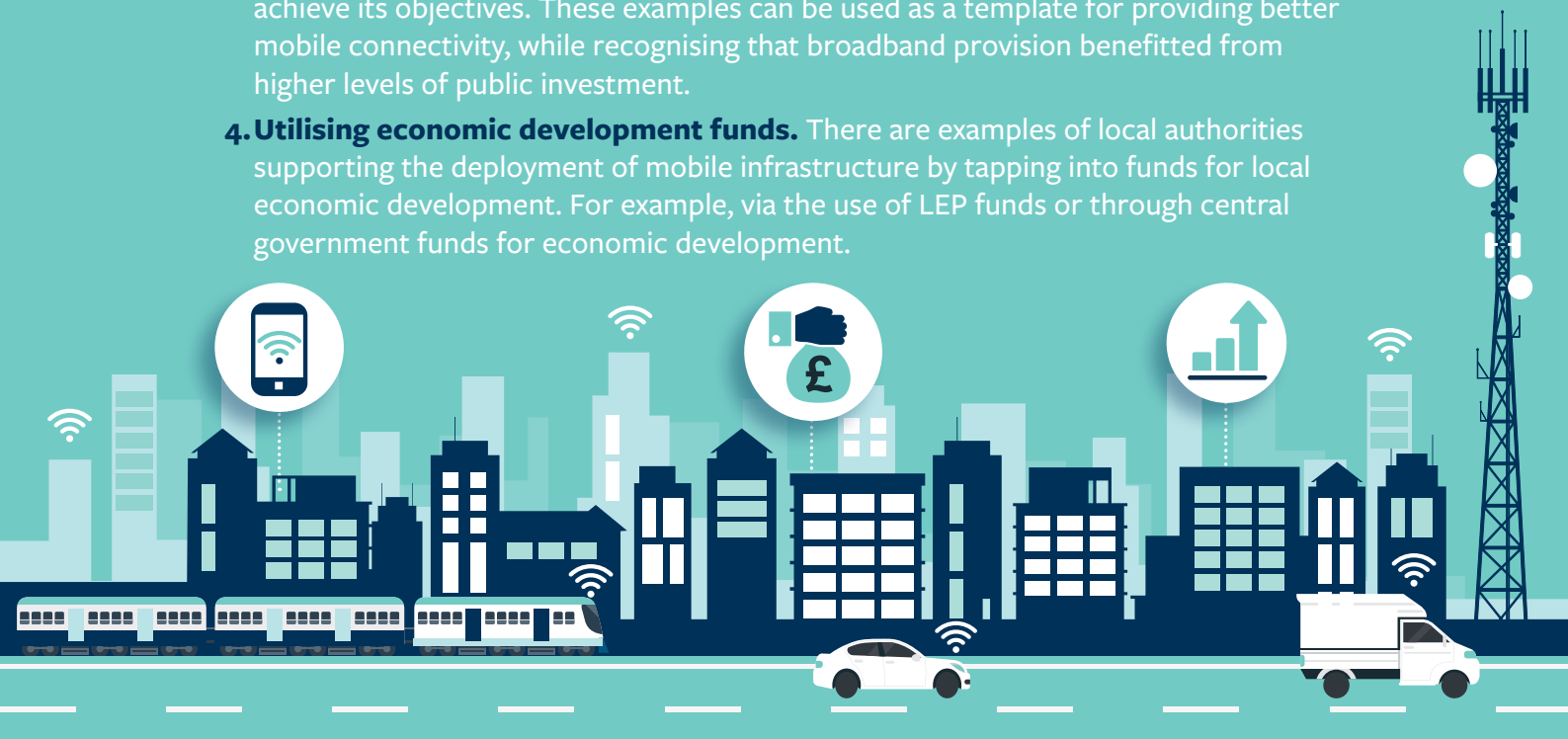
Sources[x]

connecting CAMBRIDGESHIRE

2 PLAN FOR THE LONG-TERM

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

1. **Embedding mobile connectivity in plans for local economic development.** The development of mobile infrastructure should be included in Local Plans and all other types of local economic strategy – including those produced by LEPs. This will mean that the importance of mobile connectivity is always considered when thinking about future economic outcomes.
2. **Auditing public sector assets as potential locations for mobile infrastructure.** Using public buildings, structures and open land to install mobile infrastructure has supported widespread improvements to connectivity. The charge for use of these assets should be set on the basis set out in the Electronic Communications Code, and not at rates that disincentivise investment. This will ensure that connectivity is valued over revenue.
3. **Learning lessons from the rollout of broadband.** There are numerous examples – such as Connecting Devon and Somerset and Connecting Cambridgeshire – of how concerted effort has improved broadband provision in local areas. For instance, Connecting Devon and Somerset uses collaborations that involve different tiers of local government, local economic development funding and private providers to achieve its objectives. These examples can be used as a template for providing better mobile connectivity, while recognising that broadband provision benefitted from higher levels of public investment.
4. **Utilising economic development funds.** There are examples of local authorities supporting the deployment of mobile infrastructure by tapping into funds for local economic development. For example, via the use of LEP funds or through central government funds for economic development.



Mobile connectivity is critical to the success of our economy now and in the future. Because of this, local government should embed mobile connectivity into all long-term thinking on economic development – not doing so would marginalise mobile connectivity as an essential component of economic growth. Two examples are:

- **Including mobile connectivity in Local Plans.** At present, this does not happen as a matter of course – many local plans do not make any reference to mobile connectivity and when they do can include outdated information.
- **Working with LEPs to include mobile connectivity in Strategic Economic Plans.** There is undoubtedly opportunity to do this, as many LEPs depend on their Local Authority partners for staff and expertise.[xi]

The substance of long-term thinking should focus upon *what* mobile connectivity needs to be delivered, *where* it is can be delivered and *how* it can be delivered. Action could include:

- **Building a comprehensive understanding of local mobile connectivity.** This could help to understand *what* mobile connectivity needs to be delivered. Ofcom provides data of the indoor, outdoor and 4G coverage of the major network operators.
- **Auditing public sector assets as potential locations for mobile infrastructure.** This could help to understand *where* mobile connectivity can be delivered. For example, Norfolk County Council has publicly stated that it wants to use its assets to improve the consistency and quality of mobile voice and data coverage.[xii]
- **Learning lessons from how outcomes related to broadband were improved.** This could help to understand *how* mobile connectivity can be delivered. For instance, some local areas have facilitated the roll-out of broadband networks by aggregating public sector demand. This could include considering how council offices, libraries, schools, and other buildings from which local services are delivered.[xiii]

There are options to fund these actions outside of existing council budgets. Local economic development funds could be – and have been – used to support the build of mobile infrastructure. An understanding of the funds that are available is important if they are to be used; central government funding for local economic growth is subject to significant churn.[xiv]

CASE STUDY

Norfolk County Council – Planning for a new commercial environment

Norfolk County Council created its Digital Innovation and Efficiency Committee in the summer of 2017. The Committee's remit includes: extending access to superfast broadband across Norfolk; using technology to better deliver Council services; and, championing the ambition to improve digital and mobile connectivity by working with the government and telecoms industry.

The Committee has assessed how the new Electronic Communications Code (ECC) will affect income from telecommunications equipment on the council's property estate. It concluded that the ECC may lead to a reduction in income, but that reduced rents may open-up new sites for mobile operators to use that were not previously economically viable. The decision was to apply new rates quickly to allow operators to commit to new sites. In other words, the council prioritised connectivity over income because of the economic and community benefits it can bring.

To help understand where connectivity is needed, the Committee commissioned a survey to get a better picture of mobile voice and data coverage within the county – the survey was conducted along more than 3,400 miles of Norfolk's roads and at 30 railway stations and on mainline railways. The findings included how many call attempts were successful, where mobile 3G and/or 4G data coverage could be accessed, and how many attempts to browse the web and stream video using mobile data were successful.

The results will be used to work in partnership with mobile providers to improve coverage and tackle notspots. Not only this, but the Council has made the survey data freely available, allowing anybody to analyse mobile connectivity within their area.

Sources[xv]

Norfolk County Council

3

BUILD PARTNERSHIPS AND SHARE BEST PRACTICE

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

1. **Exploring different models of collaboration with the mobile industry.** Examples of current partnerships include regular catch-up meetings and roundtables, which support a collaborative approach between the mobile industry and local political and business leaders.
2. **Sharing best practice and skills with other local bodies.** The sharing of best practice is already happening in new structure of local government and economic development, such as combined authorities and Midlands Connect.
3. **Building internal links between departments – barrier busting at a local level.** Ensuring that there are strong links between economic development and planning directorates within local authorities is crucial for a joined-up approach to mobile connectivity.
4. **Establishing "connectivity considerations" as best practice in the planning phase of new developments.** Any development – from upgrades to the road network to new housing estates – should consider connectivity requirements prior to construction beginning, not after construction is complete. At its most basic level, the planning for large-scale developments should include an impact assessment that looks at mobile coverage needs.

Local authorities developing closer relationships with other organisations has frequently been referenced as a way of working that delivers better outcomes.[xvi] For example, guidance on how local authorities and housing associations can work together states that, *"Partnership working is fundamental to meet and manage housing need and demand"*.[xvii] It should be noted that mobile operators already do a lot in partnership with public organisations, such as providing connectivity for the emergency services and providing solutions to improve the efficiency of frontline workers.[xviii]

As the recommendations in this section suggest, partnership to support the development of mobile connectivity can be made between very different stakeholders – from councils working with other councils, to councils working with community groups. The nature of the collaboration can vary significantly. For example, the partnership between a council and a LEP in a rural area will likely be quite far removed from the partnership between a council and a mobile operator in an urban area.

There are also ways in which partnerships are facilitated by institutions and legislation. Examples are:

- **The London Office of Data Analytics.** LODA was set up to maximise the use of data in benefiting public service delivery – it has facilitated collaboration between front-line staff tasked with finding new ways of doing things.[xix]
- **The 'Duty to Cooperate'.** There is a legal duty on local planning authorities, county councils in England and public bodies, *"...to engage constructively, actively and on an ongoing basis"* to maximise the effectiveness of Local Plans in cross-border boundary matters.

Partnerships can aid the sharing of best practice, which promotes good ideas and leads to better outcomes. One idea for a best practice approach is to establish "connectivity considerations" in the planning phase of new developments to prevent connectivity issues from arising. This will help to head-off potential connectivity issues arising from complications such as the serving of Notices to Quit to operators – in this instance, alternative sites are often difficult to find, impacting on existing mobile coverage.

CASE STUDY

North Yorkshire County Council – Three key partnerships

North Yorkshire is the largest rural county in England. To help address the typical mobile connectivity issues faced by rural communities, NYCC created the role of "Programme Manager – Mobile Phone Coverage". The creation of this role has allowed three key partnerships to be forged that will create a better environment to improve mobile connectivity:

1. **Partnership One – new links with mobile operators.** Initially, meetings were held on a one-on-one basis with mobile operators and then collectively at a roundtable event facilitated by Mobile UK. The purpose of developing these links was to understand what the operators' plans were for the roll-out of infrastructure, how the council can assist in this and develop a closer working relationship.
2. **Partnership Two – understanding the approaches of planning authorities and economic strategy departments.** This helped to build an understanding of why mobile infrastructure was not going ahead. As a result, the role holder now gets asked by both mobile operators and district councils to review and assist in planning applications.
3. **Partnership Three – accessing funding from the LEP.** The council has been granted £1m from the York, North Yorkshire and East Riding Enterprise Partnership's Local Growth Fund. The funding will support improvements in mobile infrastructure.

The next stage of work for the council is to get a better understanding of the not-spots within the county and understand what other funding is available to facilitate the build of mobile infrastructure. An exercise is also underway to understand it business rate relief can be deployed to support the build of mobile infrastructure.

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How do you perform? A checklist for councils to support mobile connectivity

ADOPT A PROACTIVE APPROACH

ACTION	IN PLACE
Show leadership and political will.	☐
Create local government 'digital champions'.	☐
Provide training to ensure appropriate skills and knowledge.	☐
Lobby to remove the barriers to mobile infrastructure deployment.	☐

PLAN FOR THE LONG-TERM

ACTION	IN PLACE
Embed mobile connectivity in plans for local economic development.	☐
Audit public sector assets as potential locations for mobile infrastructure.	☐
Learn lessons from the rollout of broadband.	☐
Utilise economic development funds.	☐

BUILD PARTNERSHIPS AND SHARE BEST PRACTICE

ACTION	IN PLACE
Explore different models of collaboration with the mobile industry.	☐
Share best practice and skills with other local bodies.	☐
Build internal links between departments.	☐
Establish "connectivity considerations" as best practice in the planning phase of new developments.	☐

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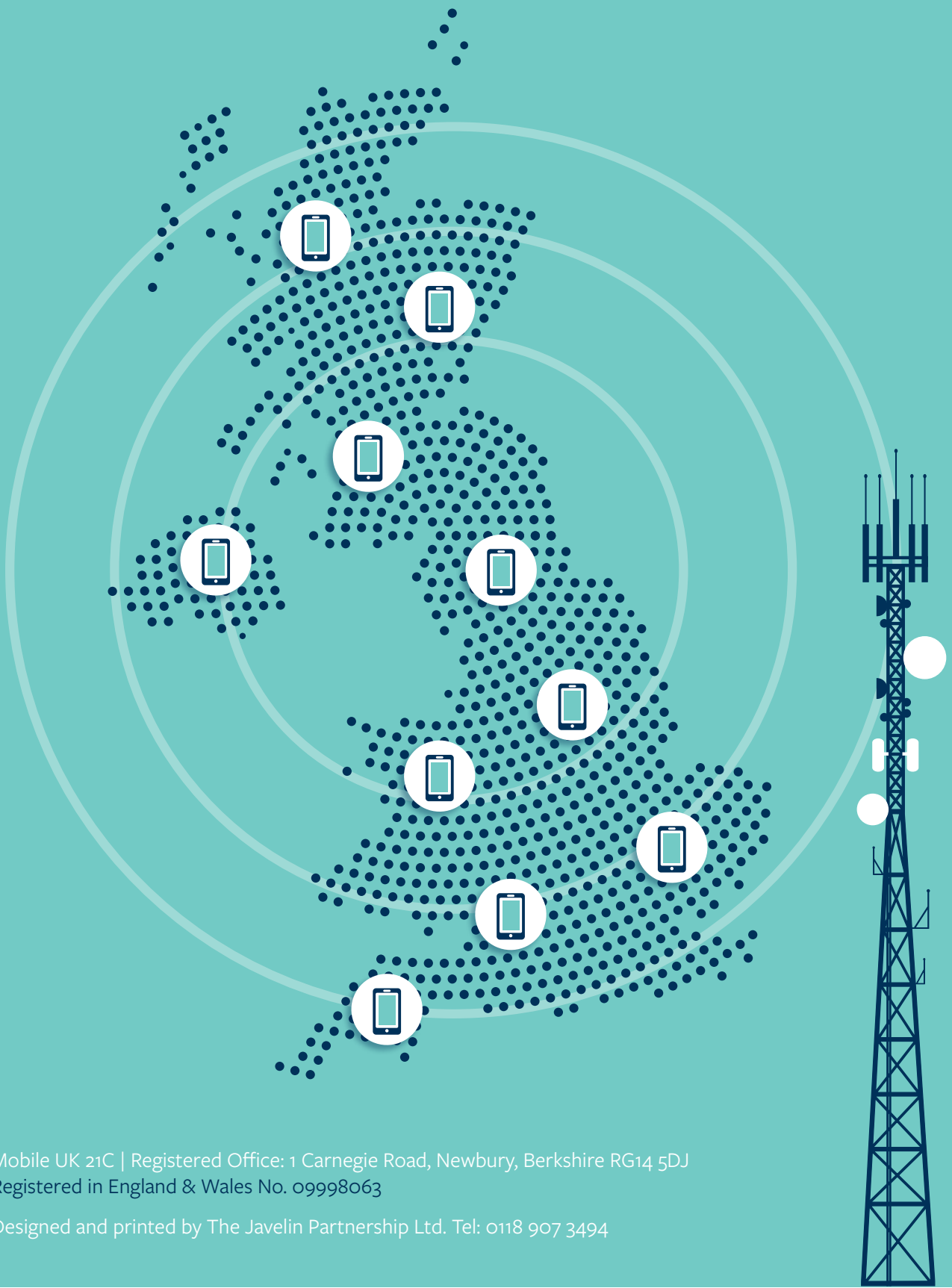

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