

# UK Government response to EU Consultation on the needs for internet speed and quality beyond 2020



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The UK government welcomes the opportunity to respond to the European Commission's consultation on broadband speed and quality beyond 2020. Ensuring access to high-quality fixed and mobile connectivity for people across the UK, no matter where they live, is a top priority for the UK government.

The digital single market is a key priority for the UK – offering the potential to drive jobs and growth. The UK vision for the digital single market is an open and flexible market with a regulatory framework that reflects the dynamic nature of the digital economy. We support the Commission to deliver ambitious reforms with pace that answer consumer and business demands for a reformed Europe.

This response does not answer the specific questions posed in the consultation, but instead reports on the key findings from a consultation carried out last year on the UK's future infrastructure needs. The consultation responses informed the government's Digital Communications Infrastructure Strategy (DCIS) published in March 2015, which set out what needs to be done to ensure that the UK's digital communications infrastructure keeps pace with the future user demand over the next 10 to 15 years. The points made in this response are also referenced in the UK non-paper on the review of the electronic communications regulatory framework, and the UK's response to the Commission consultation on the framework review for electronic communications networks and services.

DCIS was developed in recognition of the fact that user demand for high quality networks would continue to increase, and that action was needed to facilitate investment which would take UK's broadband infrastructure from superfast to ultrafast broadband.

The UK's broadband market has evolved rapidly in a relatively short space of time. As recently as 2004 the number of UK households with internet connections was only 50% of which two-thirds were narrowband connections. Mobile broadband was an emerging technology. Now more than 80% of the UK premises can access superfast services, 46% have ultrafast services available to them, and 4G services are spreading rapidly across the UK, with 90% of premises having 4G services.

We know that the demand for both fixed and mobile digital services and applications will continue to rise rapidly with a consequent acceleration in the amount of data carried over networks, not just from users, who are increasingly on the move, but via the Internet of Things and Machine to Machine communications.

- Analysys Mason forecast that fixed internet traffic in Western Europe would grow at 42% per annum between 2012 and 2017, almost doubling every two years.
- Cisco's Visual Networking Index (VNI) predicted that in the UK mobile data traffic would grow 11-fold from 2013 to 2018
- Ofcom have found that the average household data usage has risen to 82 GB per month, with the figures for those with fibre-to-the cabinet (FTTC) or fibre-to-the premises (FTTP) connections being considerably higher (112GB). This compares with data consumption of 23 GB per month in 2012.

To support this ever increasing demand, infrastructure that is high capacity, reliable, resilient, secure, affordable and fast, will be needed. A key point from DCIS consultation responses, which was repeated in the UK non-paper, was that what matters most is the overall quality experience enjoyed by the user, and not just the speed. Increasingly, once a minimum connectivity floor is reached, users will want to be confident about the reliability of the connection, its resilience, and the other factors which can impact on the user experience, such as the in-home network, or the ISP's network.

Fibre is an important element of infrastructure, because it underpins not only fixed broadband access but also mobile and wifi networks. As data traffic over mobile networks rises and higher speed services become available mobile operators will increasingly require access to fibre infrastructure to make the best use of the finite spectrum available to them. Some DCIS responses suggested that this necessitates the extension of fibre to the premises (FTTP) to meet future demands. There was however no consensus emerging on this point. Equally many noted that demand, particularly for residential users, could be met by alternative technology solutions.

In future, while there is likely to be an expansion in FTTP deployments, G.Fast will allow ultrafast speeds to be delivered over copper networks. Cable will also continue to have a role to play in delivering ultrafast services and the capability of satellite communications will also grow, which will be particularly important in serving hard-to-reach areas.

The UK government considers that all these technologies will continue to have a role to play for some time in catering for evolving user needs, and that it will be important to continue to adhere to the principle of technology neutrality. This will allow greater flexibility and allow technology options and private investment to better reflect the varying market circumstances in Member States. The regulatory framework needs to encourage private investment in infrastructure and quality services as far as possible in order to meet these needs.



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