

Broadband Infrastructure Competition



Great for Consumers
Great for the Economy

A 2024 manifesto from the
Independent Networks Cooperative Association
for the UK full fibre broadband sector

 **INCA**
the independent networks cooperative association

A key partner for the next Government

RECOMMENDATIONS: THE FIRST 100 DAYS OF GOVERNMENT

1

Achieve universal coverage by recommitting to Project Gigabit

The next Government must remain committed to the Building Digital UK (BDUK) programme, which has successfully made significant progress in rolling out digital infrastructure, but it is not finished. Universal coverage has yet to be met, and swathes of the country are still languishing in the digital slow lane, which will only exacerbate existing social and digital exclusion.

2

Support competition and consumer choice in the private rental and social housing sectors

BT Openreach have long called for an automatic right to enter private property – particularly Multiple Dwelling Units – to upgrade internal cables from copper to fibre without the need to gain permission from the property owner. However, in order to preserve a fair and rigorous competitive market, the next Government must reject these proposals, which would inherently undermine competitive investment by entrenching BT's incumbency advantage and providing them with a huge commercial advantage.

3

Minimise disruption and speed up rollout by fully adopting flexi permits

Flexi-permit trials have been shown to be a success for industry, councils and residents, allowing the authority and the network operator to work collaboratively and mitigate concerns around projects overrunning. The next Government should encourage and facilitate the use of flexi-permits to support infrastructure development projects.

POLICY PRIORITIES FOR THE NEXT PARLIAMENT

4

Secure the UK's digital future by embracing competition and consumer choice

Despite the profound strides forward in the roll-out of full-fibre infrastructure, the economic headwinds over the past few years have dented investor confidence in the UK market. The next Government must provide reassurances, supportive policy and a supportive regulatory environment to deliver a fair and competitive marketplace across the UK to provide Altnets with the opportunity to deliver long term benefits for consumers and businesses, underpinning nationwide economic growth.

5

Launch a public information campaign about the digital infrastructure revolution

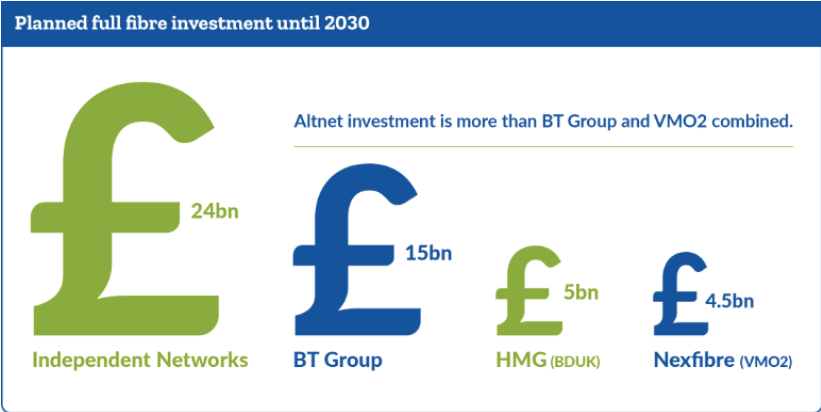
We're in the midst of the biggest telecoms transformation in our lifetimes, and the public are largely unaware. The old copper phone network will be switched off within a couple of years, impacting much more than just voice services. Fibre delivers huge benefits, and a well-informed public will be better able to navigate the coming changes and take advantage.

Everything we do, whether for work, socialising or accessing public services, depends on having a fast reliable internet service. We live in an increasingly digital world and having all corners of the country able to access next-generation full-fibre gigabit speed broadband is critical for the country's future economic growth.

Growth, productivity and competitiveness of the UK economy is reliant upon a functioning and competitive digital infrastructure marketplace.

has been driven by huge private investment – significantly more than the commitments made by incumbent operators BT Openreach and VMO2 combined.

Fixed telecoms has become highly competitive, with new operators driving innovation and direct competition to the traditional market incumbents.



Consumer satisfaction levels with Altnet services are strikingly high when compared to traditional mainstream providers.

Alternative network providers – the Altnets – have been building new networks and delivering new services at competitive prices to previously underserved and hard-to-reach areas, connecting more homes and businesses than ever before.

The competitive environment has been a great success for the sector. Expansion of the Altnets

The continued success of this market and its ability to offer real lasting benefits to consumers and small businesses, will depend on consistent supportive Government policy and a regulatory environment which protects and promotes the digital infrastructure competition that is already delivering benefits to consumers and SMEs across more than half of the country.

The opportunity for the growth of the wider economy through the expansion of digital infrastructure is there to be grasped by the next Government – INCA is committed to make this vision a reality and will work with the next Government to deliver it.

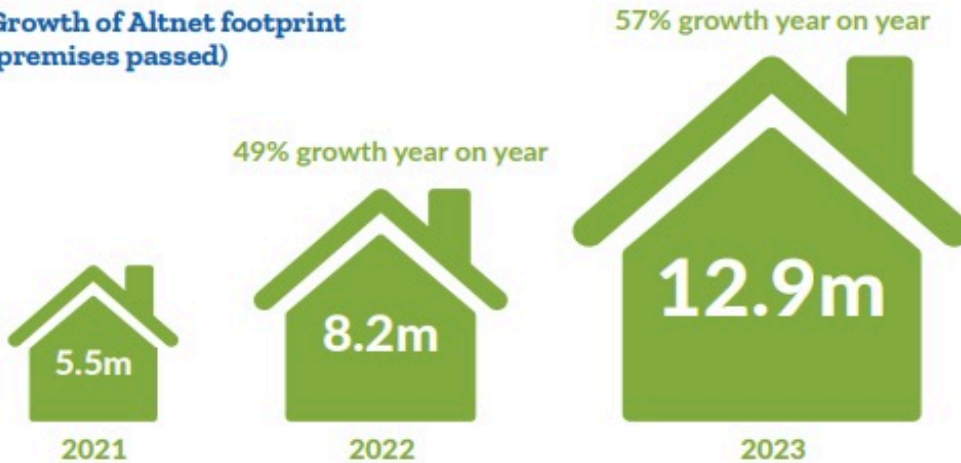
2 
million
Customers now using Altnet fibre

35%
of all UK premises passed by
Altnet fibre

32%
of Area 3* premises passed by
Altnet fibre

12.9m >|< **12.8m**
Homes passed by Altnet fibre Homes passed by Openreach fibre

Growth of Altnet footprint
(premises passed)



* Area 3 was defined by Ofcom as parts of the country (mainly rural) where no material Altnet competition to BT Openreach was expected. The figures above are accurate as at December 2023.

 **INCA**
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The Independent Networks Cooperative Association (INCA) is the leading UK trade association representing organisations deploying independent digital infrastructure. Founded in 2010, INCA aims to foster a new approach to digital infrastructure, focusing on full fibre (FTTP) and high-quality wireless broadband whilst campaigning for the policy and regulatory support needed to maintain a healthy, competitive market. INCA has over 200 members and represents most of the full fibre infrastructure builders commonly referred to as Altnets. Members include network owners, operators, suppliers, and managers as well as access networks, middle mile networks, network hubs and exchanges and organisations (including public sector and local authorities) that are developing or promoting independent networks.

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For more information about INCA and the Altnet sector connect with us:

