



Altnets: Scaling up

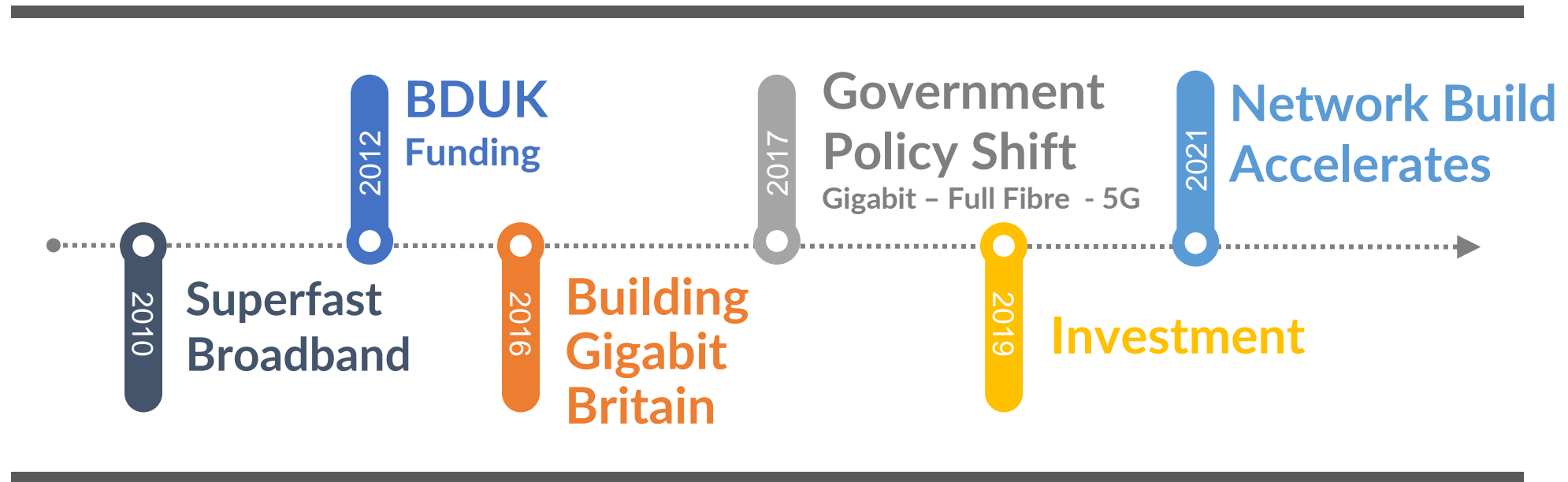
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INCA Board Director

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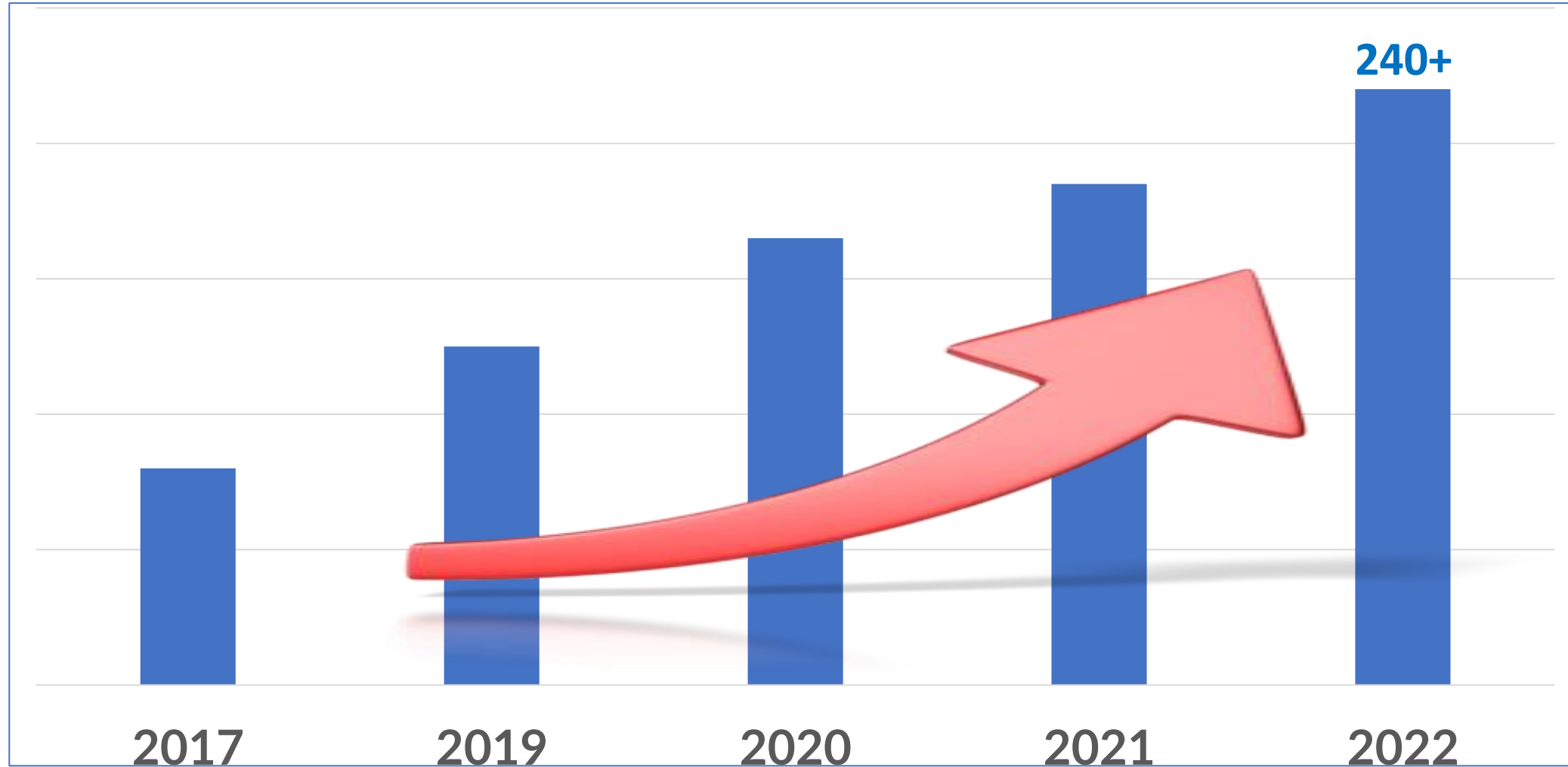
@inca_networks

INCA: Into Our 2nd Decade

- Independent Networks Cooperative Association



A Fast Growing Membership



Networking & Learning 2022

Telecoms Security Legislation

New legislation creates a serious compliance burden for operators of all sizes. This webinar explains the issues for fibre operators



Technical & Operations Conference

In this conference, we discuss the importance of the right tools for network design and operations, look at the latest developments in the build process, developments in switching and wholesale



One Touch Switching

The new 'gaining provider-led' approach to customer switching mandated by Ofcom. This webinar looks at the latest state of play with OTS both in governance and operational development



Investment in Digital Infrastructure

Bringing together investment managers and senior figures from the altnets this webinar will discuss current levels of investment and prospects for consolidation



Altnet Growth & Development

This event will discuss INCA's new policy report surveying developments in the sector and how government and regulator can best support competitive digital infrastructure investment



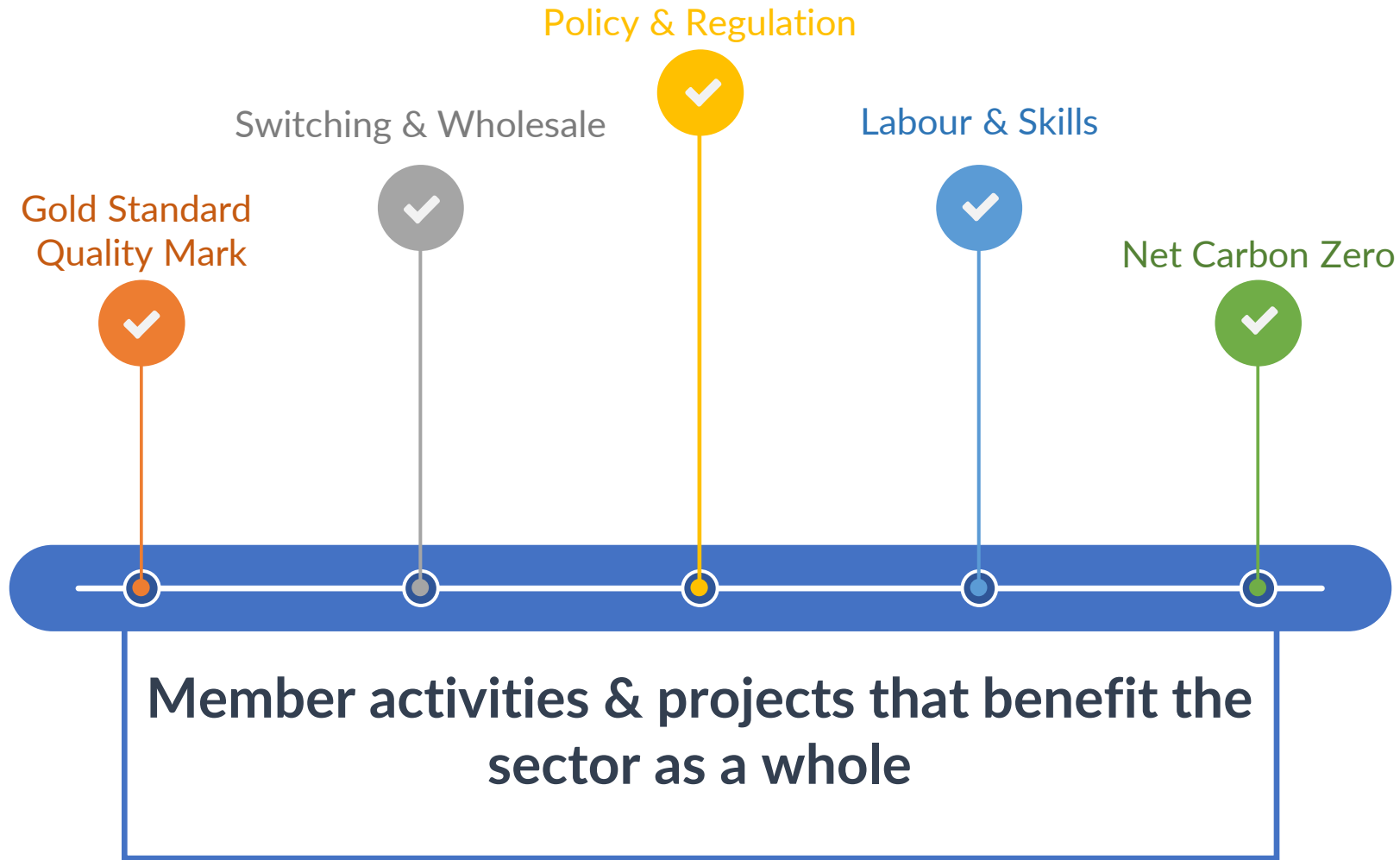
INCA Conference & Awards

Our flagship event of 2022
A St George's Hall, Liverpool
16th & 17th November



#ScalingUp - INCA Conference 2022

Interest Groups & Projects



INCA Point Topic Metrics Report 2022

Released 13th June, 2022:

Metrics for the UK Independent Sector

- 5th year of market survey for INCA by Point Topic
- Surveys INCA Members, network build and investment
- Record response rate – more organisations responded than ever before
- Cross-ref with entire sector, market
- All operators submit network size and build-plans to Ofcom
“Connected Nations” report

INCA Key Metrics from Point Topic Report

- Increase of 111% year on year
- 5.5m premises passed with FTTP
 - Expected 11.6m by end 2022
- 1.03m premises connected
 - Expected 1.4m by end 2022
- Massive growth in the next 3 years
- Doubling build to 11.6m
- 7-fold increase in connections
- Wholesale will play a key part in increasing take up and choice

The Pace and Scale of AltNet Deployment

Connections



Premises passed



INCA Key Metrics from Point Topic Report

Estimated Full Fibre Investment

The UK is on track, for the first time in its history, to have real broadband infrastructure competition.

All figures are estimates.

£ 2B+

VMO2
(until 2028)

£ 5B

BDUK
Project Gigabit

£ 12B

BT Group
(until mid/late 2020s)

£ 17.7B

AltNets
(until end 2025)

* PLUS....
Recent June announcement by Cityfibre of £4.9bn debt package to reach 8m premises

AltNets and government funding expected to reach £36.7 billion.

Top Concerns

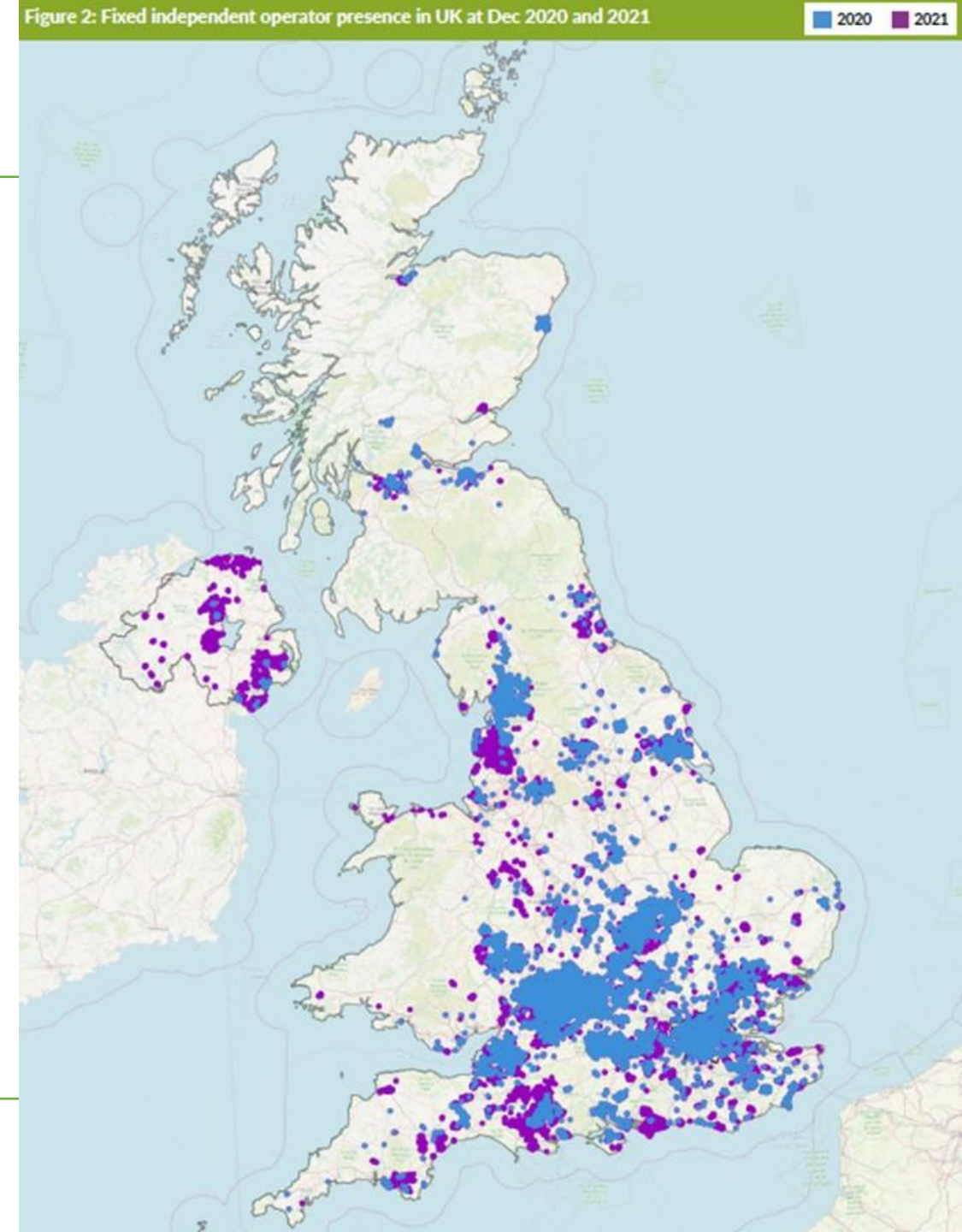
The report also ranks industry concerns, reflecting industry responses to the survey issued alongside report development (c.20 independent network operators responded):

1. Planning and street works delays and/or costs
2. **Project Gigabit procurements and threat of overbuild of your commercial networks**
3. Delivery times for services from Openreach or other operators (e.g. EAD circuits, PIA)
3. **BDUK's pause on community-led ISPs Gigabit Vouchers affecting current and future deployments**
3. Getting wayleaves
6. Access to skills and labour
7. **Openreach's Equinox scheme resulting in overbuild within your current build plans**
8. Access to cost-effective backhaul services
9. Proposed price list increase on PIA products
9. **Project Gigabit procurements and the tendering process**

Those in bold are new entries for 2022

Turning Investment into Fibre

- London coverage expanding
- Significant build in North West
- Continued expansion in almost all towns and cities in the Midlands
- Plenty of activity in the South West
- But...rural areas continue to suffer
- Large gaps in North, Scotland and Wales



INCA Labour, Skills & Training webinar (16th June)

Strategic Resource Planning across the Sector:

Under the three key themes of Recruitment and Retention; Diversity; and Training and Upskilling

Subjects include:

- Creating a workforce pipeline
- Identify the true labour needs for our sector across the various roles
- How to attract and retain a diverse workforce
- What skills are needed now, in the short term, and in longer term

Get in touch to learn more

INCA Conference & Awards – See you there 😊

Our flagship event of 2022: The INCA Conference & Awards Dinner

At St George's Hall, Liverpool, 16th & 17th November

- Tech Showcase
- Investor & Operator workshops
- Switching, Wholesale
- Net Zero Carbon
- Project Gigabit
- Policy & Regulatory Issues

- <https://www.inca.coop/events>



Thank you

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