Connecting today for tomorrow

Are we there yet? Future-proofing the UK's digital connectivity infrastructure

2025/2026

CLUTTONS

cluttons.com

Introduction

The amount of data we use on our mobile phones has more than trebled since 2019 in the UK and is set to climb further. At the same time, the UK fell to a ranking of 53rd globally for mobile download speeds last year, and it looks like the UK will miss its own targets for rolling out standalone 5G* across the country. Data usage over broadband in the UK has risen by more than 1600% since 2013, but the UK sits in 44th place globally for broadband speeds and fibre connections remain an issue for millions of households.

* Stand alone 5G means not relying on 4G infrastructure

Consumers, industry, and policymakers all know that more needs to be done to make sure the UK has the digital connectivity it needs, not only to service the current demands from homes and businesses, but to future-proof the country with the increasing demands for data as more services move online, and to be competitive on the world stage.

In the year since we published our 2024 Digital Connectivity report, there have been some welcome policy interventions and announcements, especially in the first half of 2025, but we now have to ask – are we there yet? And if not, what needs to happen now to ensure the UK has the digital infrastructure it needs to provide best-in-class connectivity?

This is a crucial question to answer, as good connectivity is critical to boosting productivity, thereby increasing economic growth. It is also necessary to support the functioning of society and Government, all of which was recently recognised in the Government's own Infrastructure Strategy, quoted below.

As part of our examination of the sector, Cluttons, in conjunction with YouGov, has surveyed MPs for a second year running, to continue our momentum in gaining a deeper insight into how those sitting in Westminster are thinking about digital connectivity and the infrastructure to deliver it. The findings from the survey of 108 MPs are instructive, and underline some of the measures we have been calling for to smooth the path for a faster roll-out of gigabit-capable broadband and standalone 5G across the country. Our survey also revealed that nearly 90% of MPs said good digital connectivity was important for increasing productivity and boosting UK economic growth.

Cluttons' position in the market as a touchpoint for operators, landlords and the public sector means we also have a unique insight of the hurdles facing those responsible for delivering the UK's connectivity from every angle.

"Digital infrastructure supports productivity growth through lowering costs for firms, underpinning technological change, widening access to labour markets across the country and enabling new and innovative services to be provided.

Digital infrastructure also increasingly underpins the provision of services critical for the functioning of society, business, and Government… The Government is committed to facilitating the development and expansion of cutting-edge, secure, and sustainable digital infrastructure that meets the needs of both the private and public sectors."

Government's Infrastructure Strategy, June 2025

Survey data based on YOUGOV poll of 108 MPs carried out between 1-28 April 2025, survey weighted to reflect seat counts in Parliament.

Executive summary

This report examines how the UK is currently falling behind in meeting its own targets for gigabit-capable broadband and standalone 5G across the country, with a recognition by MPs that the Government needs to be doing more, especially as the copper switch-off approaches.

Connectivity is essential for everyone, and especially the UK's businesses. Our Q&A with Tom Vaughan-Fowler at WiredScore underlines this, highlighting that one hour of internet downtime can cost businesses an average of £220,000 an hour, with larger businesses possibly losing more than this. A new report from BT shows delays in rolling out standalone 5G is costing the economy £230 billion.

Around 60% of businesses understand the relationship between good connectivity (fast, reliable connections on all devices) and the infrastructure (masts and cables) needed to provide it, according to our survey of MPs. Only 46% of MPs said that policymakers understand this link, falling to 33% when it comes to residents. There is a disconnect here, and bridging this gap is going to be crucial. Delivering the infrastructure needed to provide good connectivity will be made more difficult if there is a lack of support or even opposition from the people who depend on, and want it.

Our report includes calls for several key measures which we believe will help speed up and smooth the roll-out of much needed digital infrastructure. Our interview with John Duncan, Connected Places Lead at the Greater Manchester Combined Authority (GMCA) on page 17, underlines how important collaboration is between the public and private sector, and the power of a strategic lead to bring stakeholders together to make progress. The Q&A with Charlotte Goodwill, CEO of the ITP on page 9 highlights the key importance of developing the skills in the workforce that will support the delivery of digital connectivity roll-out. Ensuring this roll-out will underpin accelerated economic growth, something which policymakers will all want to see in the coming years.

We are calling for:

A National Information Campaign to help everyone understand the link between good connectivity and the infrastructure needed to provide it, especially in the run-up to the copper switch-off, scheduled for January 2027.

An acceleration in planning changes to support the delivery of digital infrastructure.

The appointment of Digital Placemakers to fulfil a strategic role in all local authorities across the country, with funding from central Government.

Words to be turned into action and timings: The Government's Infrastructure Strategy included some very welcome (and in some cases unexpected) pledges around digital infrastructure. The key now is swift clarity about how and when these promises will be delivered. We would advocate for faster implementation.

> "This industry is vital to the future of our country"
>
> Commenting on the mobile industry, Chris Bryant, Digital Minister at a Mobile UK Event, July 2025

Reaching milestones?

- **UK's data requirements set to grow further and faster**
- **The UK is falling behind globally on mobile data download speeds**
- **Only a third of MPs confident that UK will meet 2030 goals for connectivity**

Chances are you are reading this report on a laptop, iPad or mobile phone – using data to stream or download the insights and images. This report, and every other single communication you have on each device needs reliable, good connectivity. If we had used AI in the production of our research, that would have required additional data capacity – and it's increasingly accepted that AI will be used more regularly, in every sector in the years to come (see page 11).

The quantity of data we use in the UK is rising strongly, according to a recent Ofcom report, and is set to keep climbing.

Monthly data usage by UK mobile phone users is up from 292 petabytes (PB) in 2019 to 1069 PB last year, a rise of more than 260%. Globally, mobile data traffic is set to rise threefold by 2030, according to GSMA, the international organisation representing mobile operators. It forecasts that the growth in mobile data traffic in the UK will outpace this increase, rising four-fold in the next five years amid growing demand for high-bandwidth applications such as video streaming and increasing adoption of smart technology.

Meanwhile the average UK data usage over broadband was 531 gigabytes (GB) per connection in 2024. When looking at data usage in full-fibre connections only, it jumps to 766 GB a month per connection. There is a bit of a 'chicken and egg' situation at play here as more data capacity is probably unleashing more demand. Ofcom says the 2024 data cannot be directly compared with previous figures, but for broad context, they reported broadband data use of 30 GB per connection in 2013 as shown in the chart below.

x4

forecast fourfold increase in UK mobile data traffic in the next five years

Source: GSMA

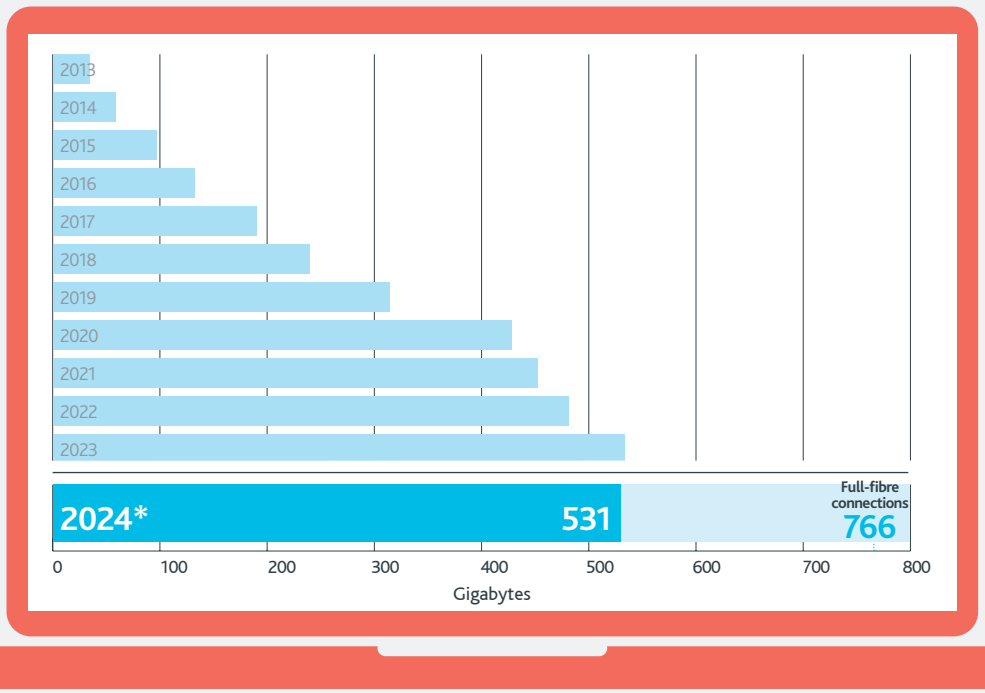
1 PETABYTE =
1,000 Terabytes*
1,000,000 Gigabytes*

1 GIGABYTE = 8 Gigabits

Capacity: The amount of data that can be stored/processed

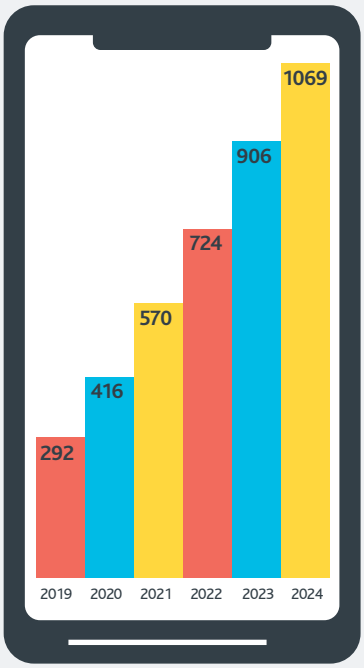
* Decimal

Average broadband monthly data use by connection, UK, Gigabytes (GB)



Source: Ofcom Connected Nations Report. *Data not directly comparable to previous years.

All UK mobile monthly traffic, Petabytes (PB)



Source: Ofcom Connected Nations Reports

Our appetite for data is growing, but the speed with which we can download it is relatively slow on an international level. The UK's average data download speed for broadband of 59.1 Mbps puts the country in 44th place in the world, behind the UAE in first place with 428.5 Mbps and Qatar with 356.7 Mbps, according to research by Ookla published by ISPreview. This is an improvement compared to last year – a reflection in some part of a wider take-up of full fibre connections.

The picture for mobile is more challenging, with average download speeds of 94.5 Mbps placing the UK in 53rd place in 2024, down from 51st place in 2023. Singapore leads the way for mobile connectivity, with download speeds three times faster than those in the UK at 316.9 Mbps as shown on page 6.

Many countries at the top of the charts for download speeds adopted 5G technology earlier than the UK, and widespread coverage means increased capacity which allows for higher speeds.

Several years ago the Government set targets that the UK should have gigabit-capable broadband in at least 99% of homes by 2030, and that all populated areas should have 5G coverage from standalone sites. Standalone means that the network infrastructure providing 5G connectivity is built for the purpose and is not relying on 4G architecture, and this improves speeds and reliability.

The UK met its target for gigabit capable broadband delivered to 83% of homes by 2025, with 86% of homes connected according to the most recent Ofcom Connected Nations Report.

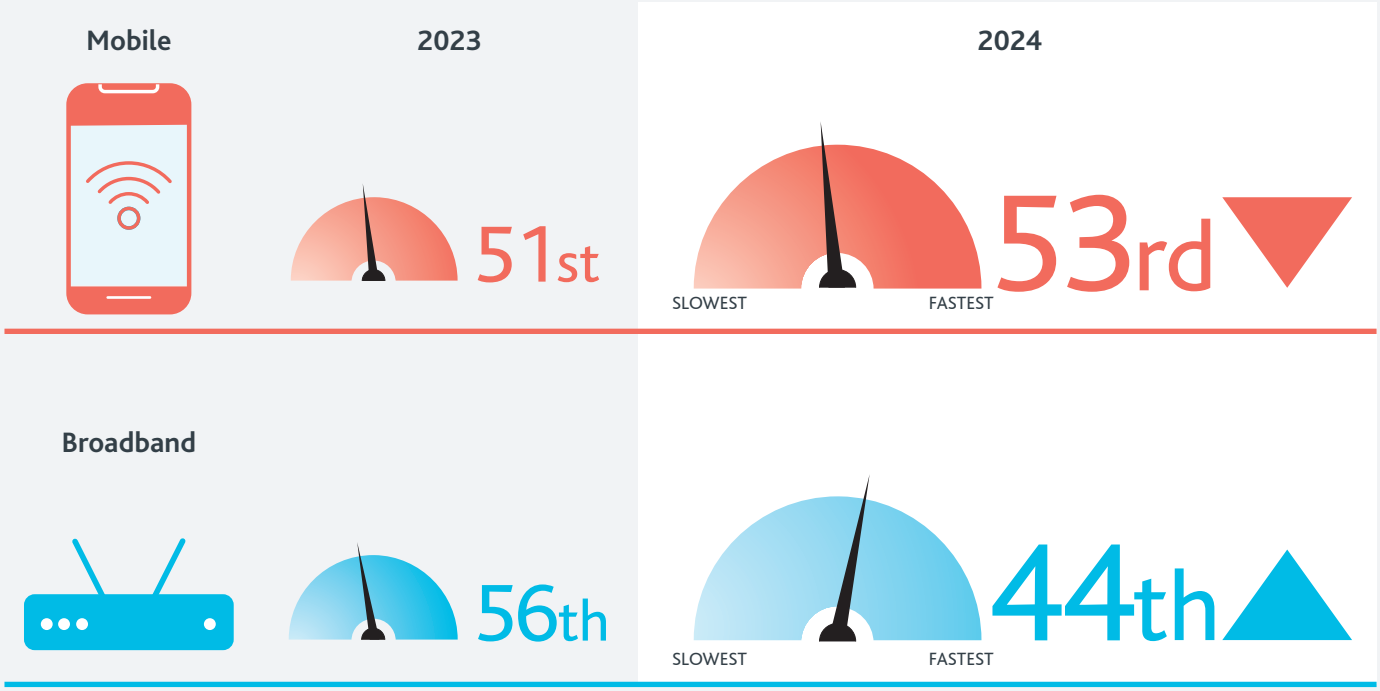
There has been unusual development in the broadband target for 2030 since early June however.

In the Spending Review in early June, the deadline for coverage in 99% of homes was changed from 2030 to 2032. This new 2032 target was repeated in the Infrastructure Strategy published several weeks later, and it has now appeared in all Government literature online.

This suggests that while progress has been steady towards the goal of 85% coverage so far, there is a recognition among policymakers that the challenge of reaching the last 15%, or more than 3 million, homes is bigger than had been anticipated. Many of these homes will be in harder to reach areas, Project Gigabit was set up by the Government in March 2021 to support the

How does the UK compare globally for data download speeds?

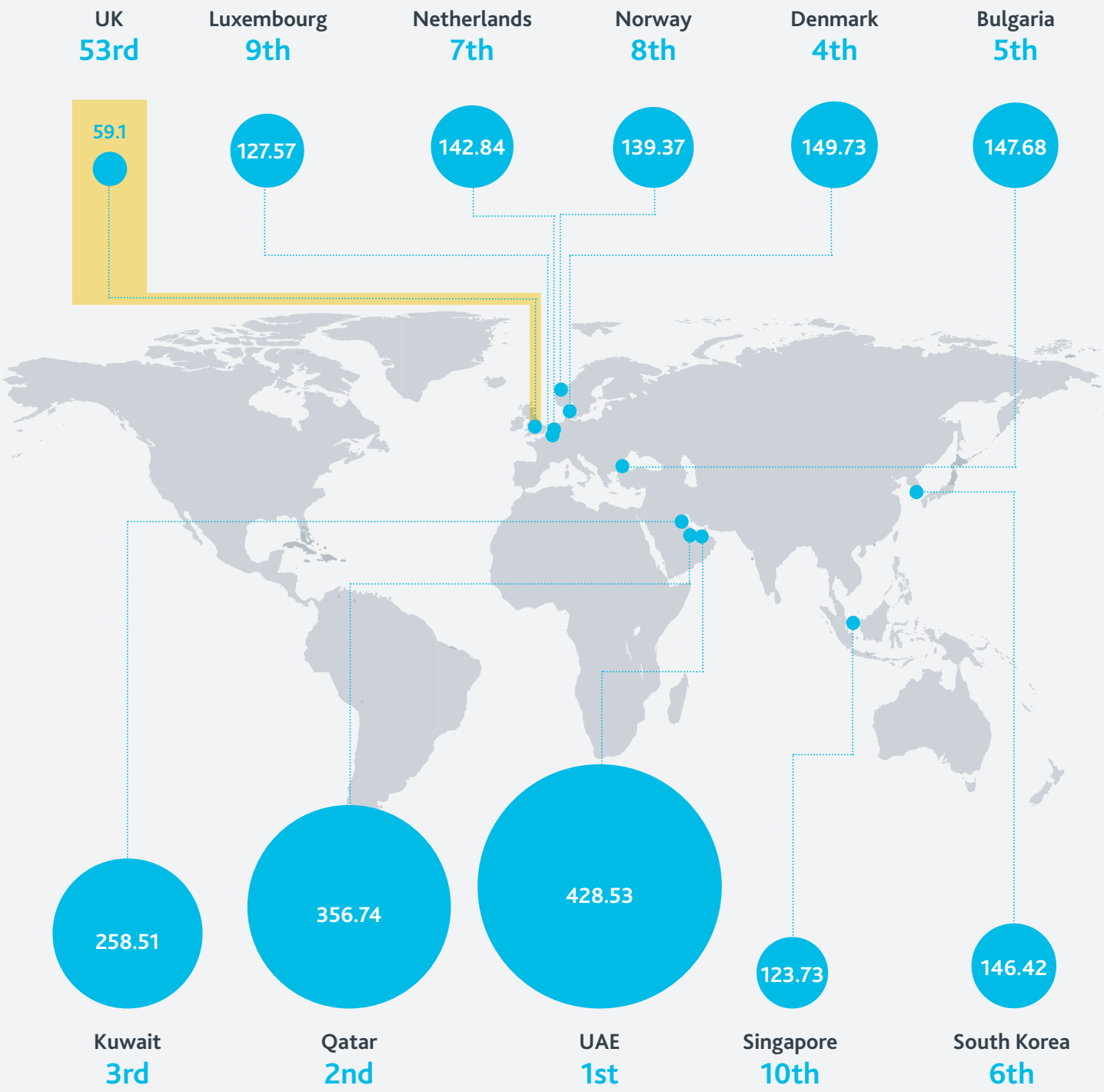
UK's global ranking



Source: Cluttons, ISPreview, Ookla

UK mobile data download speeds vs the top 10 ranked countries in the world

2024 Mobile data download speeds GB



Source: Cluttons, ISPreview, Ookla

"The roll-out of standalone 5G across the UK has been moving more slowly."

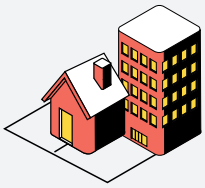
roll-out of gigabit-capable broadband in markets that may not feature in the commercial plans of the fibre operators. And the Government's Building Digital UK agency (BDUK) runs a Gigabit Broadband Voucher Scheme (GBVS) to help rural homes with slow broadband to upgrade to a faster gigabit service in some areas of the country. As we have highlighted in previous reports, some urban areas also struggle with connectivity, and in March the GBVS was extended to include non-rural areas.

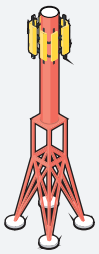
The pushing back of the deadline for the roll-out of gigabit-capable broadband underlines the need for more policy focus and local support to provide the digital infrastructure needed to supply the best connectivity that is so crucial to every aspect of life. The introduction of an updated mobile coverage mapping tool by Ofcom will also be likely giving a more accurate idea of coverage. The next step here will be to measure capacity.

The roll-out of standalone 5G across the UK has been moving more slowly. It is likely that the 2030 target for standalone 5G to be available in populated areas will not be reached. Currently some 15% of 5G sites are standalone, as shown on page 8, and more policy support and investment will be needed to smooth the path for the work needed to upgrade sites and build new infrastructure where needed.

Only around a third of MPs questioned as part of our survey are confident that the UK will achieve the Government's target of standalone 5G across the country by 2030, and the initial target for gigabit-capable broadband at 99% of residential premises in

Timeline of gigabit broadband and standalone 5G in the UK vs targets





Gigabit capable broadband
% of homes where gigabit-capable broadband available

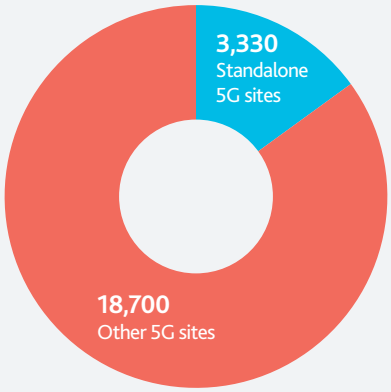
Standalone 5G
% of UK sites or UK 5G traffic

- 2021: 47%
- 2022: 70%
- 2023: 78%; 9%* of 5G
- 2024: 83%; 15%* of 5G sites
- 2025: 86%; 14%* of 5G traffic
- 2026: 85% Target: 85% of homes
- 2027
- 2028
- 2029
- 2030: 99% Original Government target for gigabit-capable broadband available at 99% of homes; 100% Government target for standalone 5G in all populated areas
- 2031
- 2032: 99% Updated target for 99% gigabit availability (Infrastructure Strategy June 2025)

Policy
NPPF
Planning and Infrastructure Bill
National Infrastructure Strategy

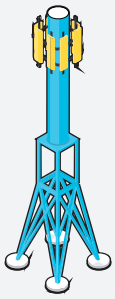
Source: Cluttons, Connected Nations Reports , Infrastructure Strategy. *Estimate based on 2024 total site figures

Standalone 5G: 15% of all 5G mobile sites, 2024



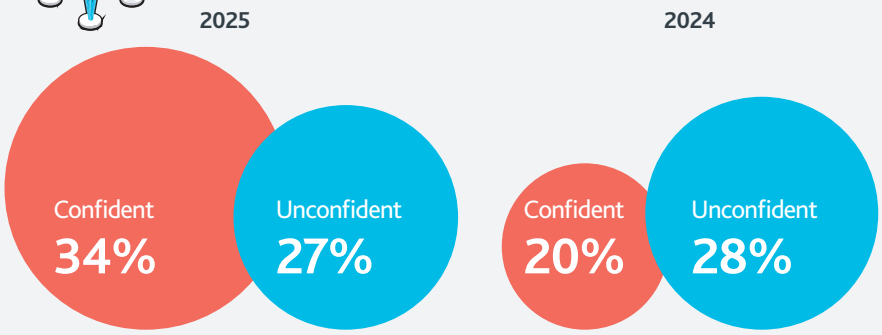
Source: Cluttons, Connected Nations Reports

Only one third of MPs are confident that the UK will achieve the Government's target of nationwide coverage of standalone 5G in populated areas by 2030



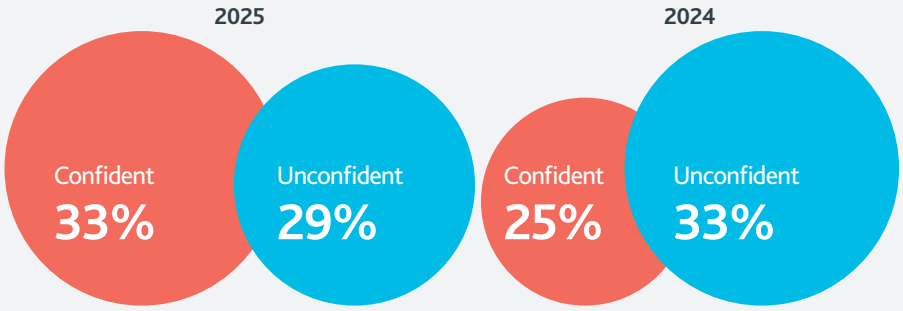
To what extent are you confident that the UK will be able to achieve the Government's target of nationwide coverage of standalone 5G in populated areas by 2030?

% of MPs



To what extent are you confident that the UK will be able to achieve the Government's target of the majority (99% of premises) have access to gigabit-capable broadband by 2030?

% of MPs



Source: Cluttons, YouGov, April 2025

the same time frame. However, confidence levels have risen since last year. There has been an election in the interim, but it is noticeable that confidence among Labour MPs has risen compared to the findings last year when very few Labour MPs thought the Government would meet their targets.

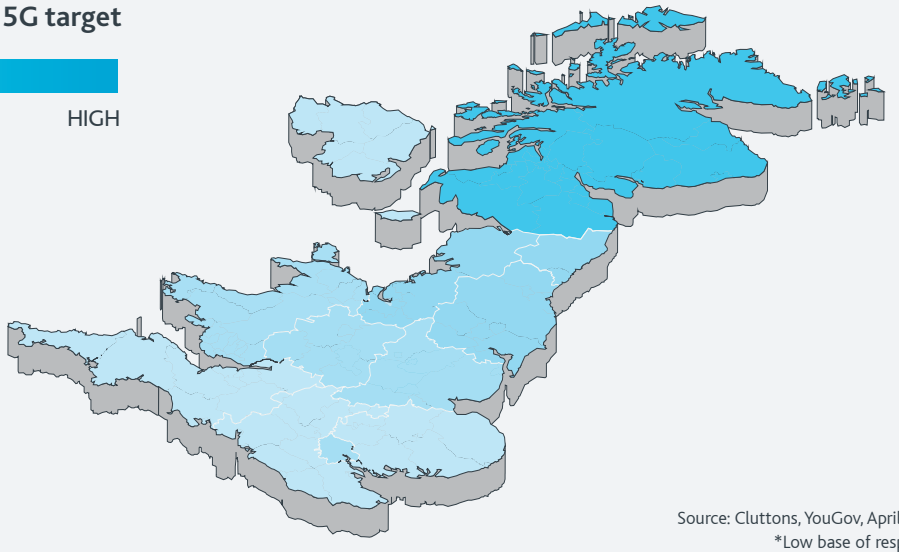
Despite this rise, only a minority of MPs believe the UK will meet its targets and there must now be consensus that despite some significant progress over the last 12 months, there is still more to be done.

The breakdown of confidence among MPs across the country on the 5G standalone target is revealing (map on next page). The highest confidence levels are among MPs in Scotland. This may seem counter-intuitive as there are more remote homes in the country – but at the same time, 5G coverage outside premises is at 91%, nearly at the same level as the rest of the country, and Glasgow has been named by Ookla as the best connected 5G city in the UK, with download speeds as much as 45% higher than London. Also Vodafone promised to extend standalone coverage in Scotland if the merger with Three was approved (which it was in May 2025). This commitment means VodafoneThree will deploy standalone 5G coverage to 89% of Scotland by 2034. If other operators are also rolling out standalone 5G then Scotland is potentially very well-positioned. MPs in other parts of the UK are less confident, and it is notable that those in the South of England, a highly urbanised part of the country, are the least positive – alongside those in Northern Ireland.

The data and signals from policymakers indicate that the UK is unlikely to meet its 2030 targets for standalone 5G or gigabit-capable broadband at the current rate of progress. There is an opportunity now to accelerate progress. Next, we examine what steps are needed to do this.

% of MPs confident UK will achieve 5G target

LOW HIGH



36%

proportion of Labour MPs confident that UK will meet 5G target

15%

of Labour MPs not confident that UK will meet 5G target

Source: Cluttons, YouGov, April 2025.
*Low base of responses

Addressing the skills needs for the sector

Charlotte Goodwill

CEO, The Institute of Telecommunications Professionals (ITP)

How would you characterise the policy landscape for the roll-out of digital infrastructure across the country at present?

The policy landscape has shown encouraging signs of momentum, and while the direction of travel is positive, the pace of delivery remains a concern. We need policy that is not only forward-looking, but also agile and responsive to technological change. We need to push for a more joined-up and faster approach to roll-out, one that brings government, industry, and local authorities around the same table to break down barriers, simplify planning, and invest in the skills that will make it all possible.

What, if any, policy changes would you like to see now, or in the future, to speed up roll-out?

One of the most immediate and impactful changes would be greater investment in the skills pipeline. Telecoms is a fast-moving and technically demanding sector, and without a steady flow of well-trained professionals, the ambition to build a world-class digital infrastructure simply won't be realised.

Promoting telecoms as a sector of strategic national importance would help address the talent gap and drive wider support for roll-out efforts while streamlining regulatory frameworks and removing deployment barriers should be a priority. A skills-ready workforce, supported by enabling policies, is essential if we are to meet the UK's digital ambitions at the scale and speed required.

What changes have you seen when it comes to recruiting talent to this industry over the last decade, and are there challenged that still need to be overcome?

Over the past decade, we've seen significant progress in how the telecoms industry attracts, trains, and retains talent, particularly through apprenticeships. At the ITP, we're proud to have played our part in driving that change.

Across the board, we've seen hundreds of success stories, with apprenticeships delivering meaningful careers and long-term progression for individuals across the country. But it's not just about technical training anymore. Employers are looking for more than just technical ability, they want professionals who can communicate clearly, understand the commercial landscape, and build strong relationships with clients and stakeholders. Encouragingly, our apprentices are stepping up to meet these expectations and thriving in these broader roles.

What changes have you seen when it comes to recruiting talent to this industry over the last decade?

Over the past ten years, the talent landscape in UK telecoms has changed significantly and, I'm pleased to say, largely for the better.

Firstly, entry routes into the sector are far more structured. We've also seen a shift in the skills employers' demand. Technical ability remains vital, but there's increasing need for professionals who can communicate effectively, manage projects, and understand commercial contexts. We've evolved our training to reflect this, combining technical and professional development in one.

Diversity and visibility have improved, but there's still work to do. Targeted outreach and STEM initiatives have widened the talent pool, and the proportion of female and minority ethnic apprentices on ITP programmes has nearly doubled since 2015. However, telecoms still trails the wider tech sector on inclusion. We must make the sector's success stories more visible in schools and to career changers.

That said, challenges remain. Telecoms continues to suffer from a perception gap. Too many still see it as "just masts and cables" rather than a gateway to AI-driven networks, smart cities, and even space-based tech. A national campaign backed by government and industry could help change that.

The importance of connectivity for landlords and investors

Q&A with Tom Vaughan-Fowler

Tom Vaughan-Fowler

Regional Director, UK, Ireland and Middle East, WiredScore

The Government's Infrastructure Strategy made it clear, perhaps the most clearly it's ever been expressed in a policy document, the link between good digital infrastructure and its critical importance for the function of business, as well as society and Government. Over the last decade WiredScore has been sharing this message – can you give us some insight into what good connectivity means for business?

It's just completely foundational for any organisation to be able to function. We think of it as the fourth utility, but in many senses it's now the most critical one. In an office setting, if a boiler breaks or an HVAC unit packs in, people will normally make do. But if they can't use their computers and their phones because of a connectivity issue, they will simply shut their laptops and leave. Good connectivity means resilience, readiness and future-proofing.

The importance of digital connectivity for all types of businesses who might be leasing buildings, from industrial to offices, has real significance for landlords and investors. Is it possible to put a figure on the value of the best connectivity, or the downside of not having it?

Studies put the cost of downtime at $300,000 (£220,000) per hour (from lost revenue, lost productivity and the cost to recover). For a small business it will be a lot less than this, and for a large business it will be considerably more. Whatever the size of the business, an hour of outage is now likely costing them more than a quarterly rent bill. 70% of the time this is a building issue, rather than a supplier issue. This makes the risk of reputation damage to landlords and investors enormous, but it also gives them a real chance to differentiate their products.

> "Whatever the size of the business, an hour of outage is now likely costing them more than a quarterly rent bill."

Are there any international trends around asset-holders of commercial property in leading global cities and how far along the journey they are in ensuring best-in-class digital connectivity?

We're seeing an increasing number of developers and landlords offer in-building mobile boosting solutions as a service. 5G, while faster, is also weaker at getting in and around buildings. So the capability of mobile phones is increasing, but their efficacy in tall, modern office buildings is actually decreasing. More and more owners are installing their own boosting equipment and offering this to tenants as an add-on service. With 6G on the horizon, this will become a greater area of focus.

What about the residential market in purpose-built rental, or multi-family buildings?

The multi-family sector has been far quicker than the commercial sector to offer Wi-Fi as a managed service. There are a variety of well-established managed service providers who offer a one-stop solution for connectivity; this covers delivery, day one connection, upgrade options and live trouble-shooting for residents. The impact on customer satisfaction for BTR schemes is enormous. Getting a broadband connection is a major headache for a lot of people, but these services completely remove that.

If there was one change you would make now to help boost connectivity in the UK now, what would it be?

I have a slightly odd fixation with digital connectivity on trains! I think every train passenger in the last 10 years has experienced just how awful onboard connections are, be it their phone or the attempts at connecting with the Wi-Fi provision. Modern technology is now at a stage where that really needn't be the case. We hear a lot in the UK about "levelling up" the regions; if trains were somewhere that you could reliably work with good connectivity I think it would have a major impact (see page 18).

AI and the need for connectivity

The rise of Artificial Intelligence (AI), especially generative AI, is already increasing efficiency and creating a new global landscape, especially for businesses. Using this technology requires very good levels of connectivity, whether in the workplace or at home, and not having access to this will limit the impact AI can have. Policymakers will be acutely aware of this, considering they have identified the rise of AI as a potential economic booster for the UK.

At the same time, generative AI also requires increased levels of high-density computing provided by data centres, particularly hyperscale data centres. Training and deploying AI models also involves storing and accessing very large datasets.

Online AI tools tell us that if we had created this 20-page report with similar images and graphics via an AI tool, it would have required 100MB of data to produce, roughly same as an hour of streaming a film (any questions about the relative quality of such an AI-produced Digital Connectivity report are for another time!). Multiply this 100MB of data by the tens of thousands of UK businesses that are increasingly turning to generative AI tools in all their different forms, and the data requirements start to look very large. In addition, the data needs for these reports, or other outputs such as audio or video, does not include the vast amounts of data needed for the complex models that power AI-generated outputs. Chat GPT-4 uses a dataset bigger than a Petabyte.

The needs of AI has created a new wave of demand for data centres alongside the already growing demand from all businesses to power their computing resources and storage as well as large web services companies such as Microsoft Azure and Google Cloud.

The Government is keen to support the expansion of data centres through the UK, designating them as Critical National Infrastructure in September 2024, and announcing new AI growth zones at the start of 2025, offering the opportunity for local areas to apply for a designation which will speed up planning and allow better access to the grid for data centres.

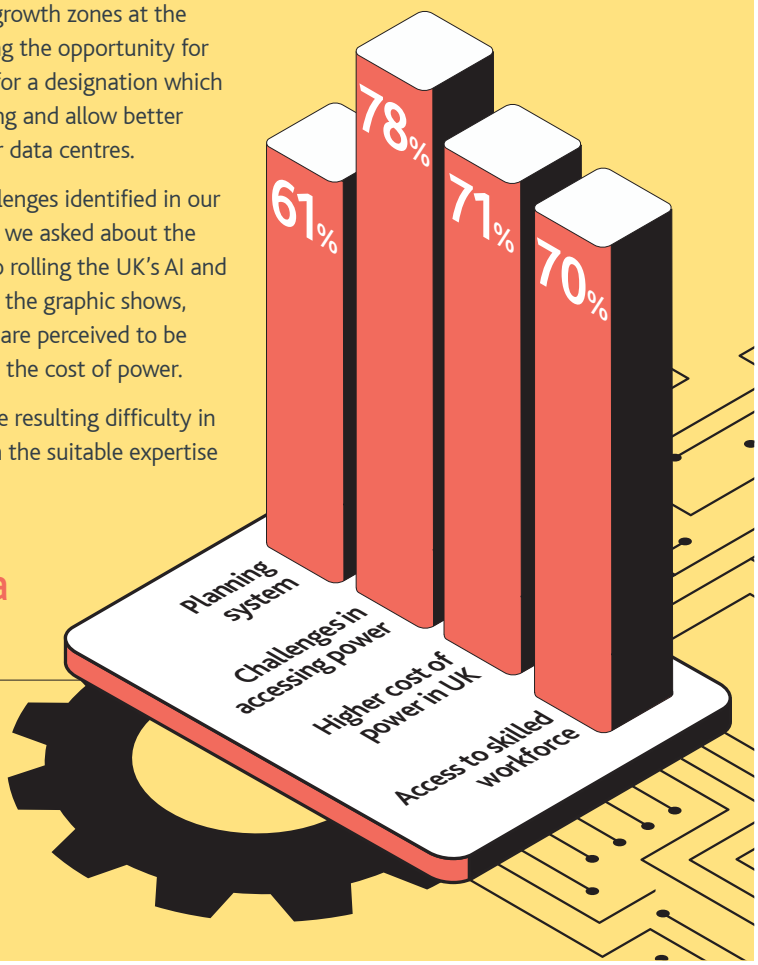
This echoes the challenges identified in our survey by MPs when we asked about the current challenges to rolling the UK's AI and data centre plans. As the graphic shows, the main challenges are perceived to be accessing power and the cost of power.

The skills gap and the resulting difficulty in recruiting those with the suitable expertise to build data centres was also identified as a significant or moderate challenge by 70% of MPs, while the planning system was called out as challenge by 61% of respondents. Access to power and a smoother planning system is something that AI growth zones will seek to address, and the need for this support is illustrated by the fact that the Government had more than 200 responses by Local Authorities across the UK in the first application windows.

There are 382 LAs across England, Wales, Scotland and Northern Ireland. The scale of this response would suggest that the planning support being offered in the growth zones could be applied across the whole country.

Challenges to the UK's AI and data centre expansion plans

Proportion of MPs saying the following factors are a challenge:



Source: Cluttons, YouGov

How do we speed things up?

1 Mind the gap

- **The disconnect in understanding about digital infrastructure can be a drag on progress**
- **Some positive developments but more needed**
- **Cluttons is calling for a National Information Campaign funded by the Government**

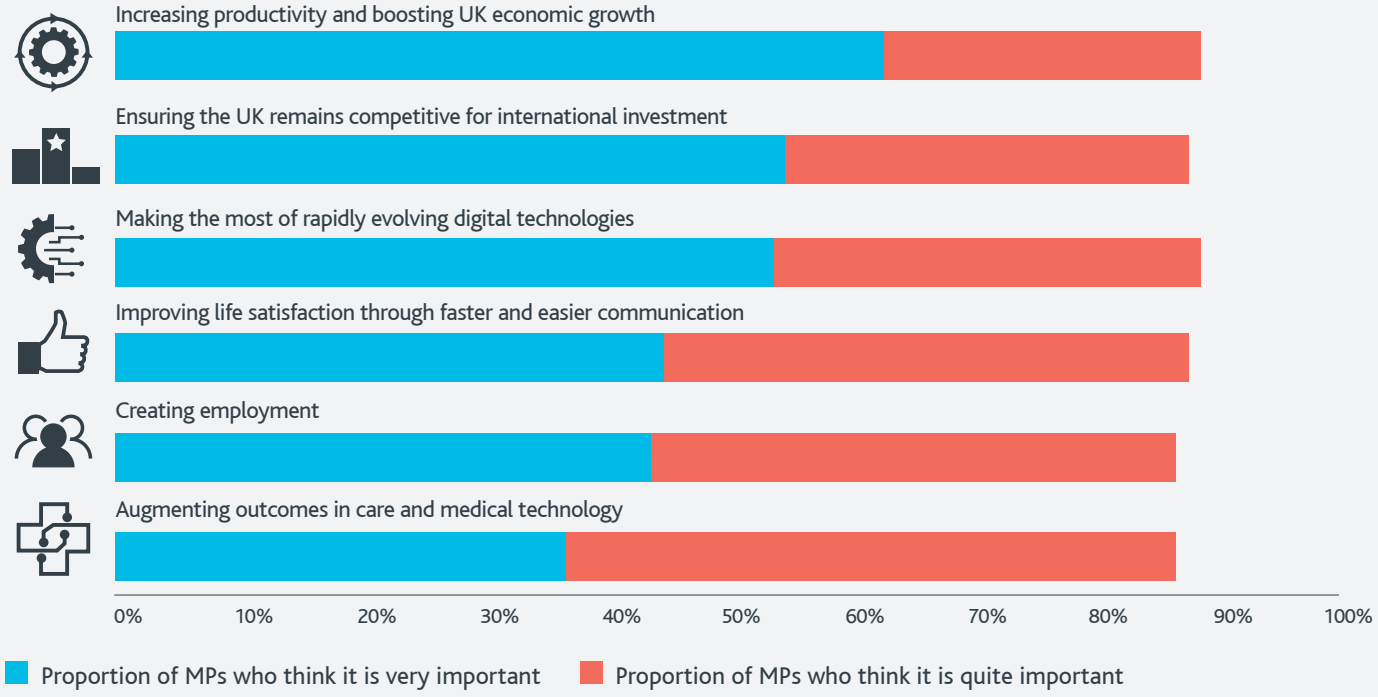
When we look at the factors that could be stalling progress in the roll-out of gigabit-capable broadband and 5G, a key element that comes through clearly from the survey, and our conversations in industry, is that there is still a challenge around peoples' understanding when it comes to good connectivity and the infrastructure that is needed to provide it.

When we asked MPs about how important good connectivity was – they were clear on the benefits. As the chart below shows, in terms of increasing productivity and boosting UK economic growth, nearly 90% of MPs said that good connectivity was important. Likewise, for creating employment, improving life satisfaction, ensuring the UK remains competitive and making the most of rapidly evolving digital technologies, more than 85% of MPs all said that good connectivity was important to achieve these goals.

Our survey also shows that residents want and expect good connectivity. When asked if it's an issue that their constituents raise with them often, 44% of MPs said it was. Only 6% of MPs said their constituents never raised the issue with them. The responses show that a higher proportion of MPs in Wales and the Midlands responded that their constituents raised connectivity issues with them, while in London, MPs reported less frequency. This highlights the local nature of the roll-out, and the generally higher levels of connectivity in large cities. If connectivity is an issue that is often being raised at constituency offices up and down the country, there is a real political driver for the Government to grasp this issue and push even harder for faster roll-out.

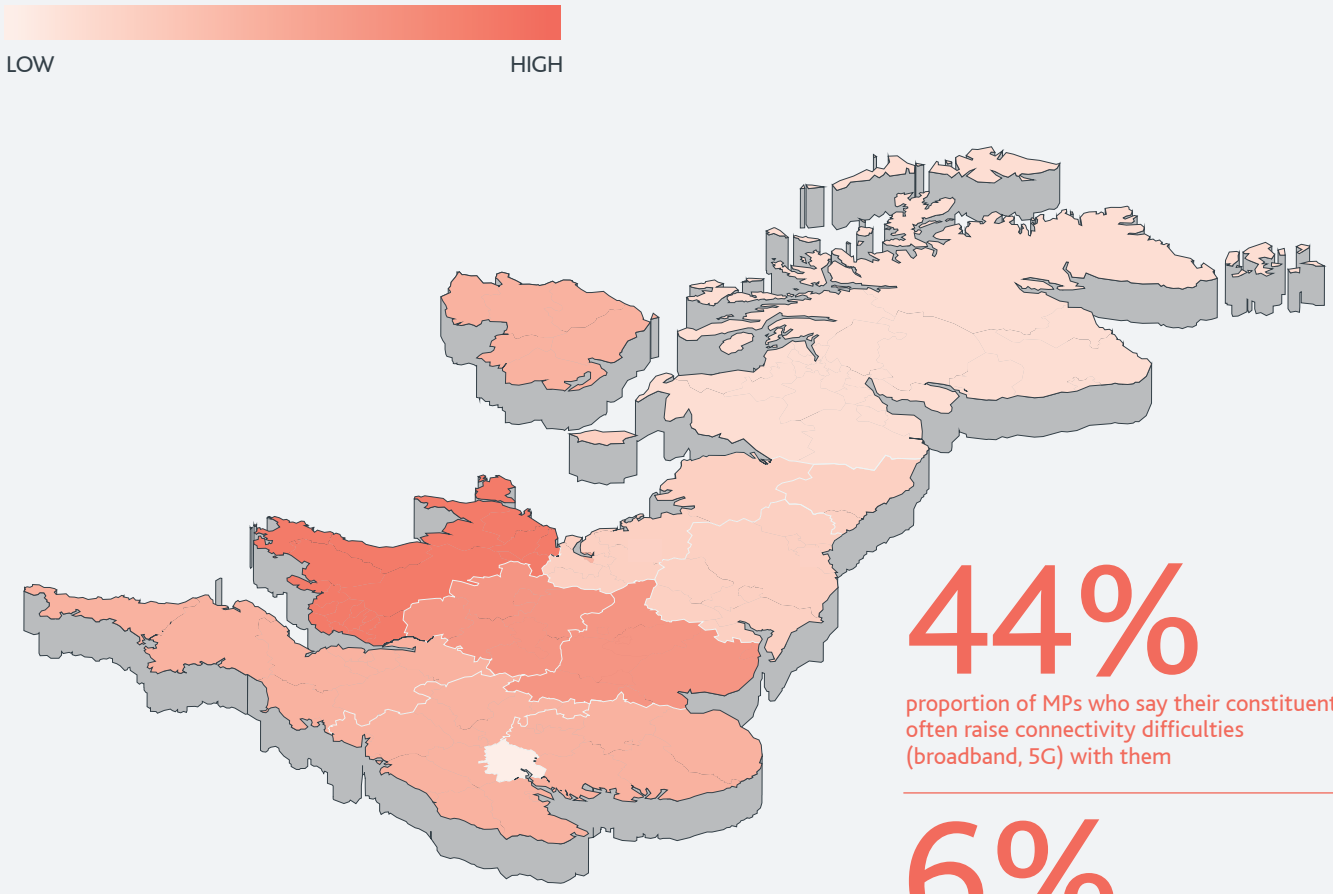
This is especially true in the run-up to the copper 'switch-off', where the copper wire telephone network will be fully withdrawn in 2027, replaced by digital or fibre connections. A half of MPs surveyed said the Government 'should be doing more' around educating people about the copper switch-off as shown on page 14.

How important is good digital connectivity for:



Source: Cluttons, YouGov, April 2025

% of MPs say constituents often raise connectivity difficulties with them



44%

proportion of MPs who say their constituents often raise connectivity difficulties (broadband, 5G) with them

6%

proportion of MPs who say their constituents never raise connectivity difficulties with them

Source: Cluttons, YouGov

Note: Weekly or more often 13%, At least once a month 31%

47%*

of the MPs who identified a disconnect between good connectivity and the infrastructure to provide it, said it was because there is not enough information given to people about how good connectivity cannot happen without infrastructure to support it.

Source: Cluttons, YouGov. *Low base of responses

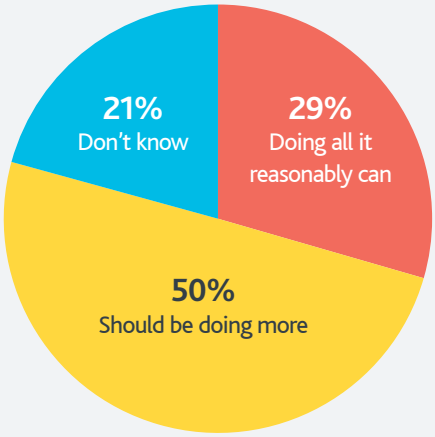
Life saving campaign

The Government recently announced it is supporting a campaign being run by BT and Virgin Media around awareness for lifesaving telecare alarms, to make sure that none of the two million alarm users who need to be switched over to new connections after the switch-off are left without access to help. This is a really positive step, but it should be the first step in a wider consumer campaign about the UK's connectivity, why we need it now, and for the future, and what's needed to provide it. It is true that the Government has certainly made a big splash about AI and data centres in their recent set pieces – the Budget, Spring Statement and Spending Review. But these are both secondary effects of a good network of connectivity with suitable coverage, capacity and speed.

Yet when it comes to the link between fast and reliable digital connections on mobile phones and laptops and other devices, and the masts and cables needed to provide it, the picture becomes less clear. In an echo of last years' survey, MPs were not confident that they, or residents in their constituencies

Is the Government doing enough to ensure everyone understands the benefits of using fibre broadband ahead of the copper switch-off?

% of MPs responding:



Source: Cluttons, YouGov, April 2025

understood it. Indeed, only 46% of MPs said that policymakers fully understood this connection. It is interesting that 60% of MPs said that businesses understood the connection better than other parties as shown in the graphic below.

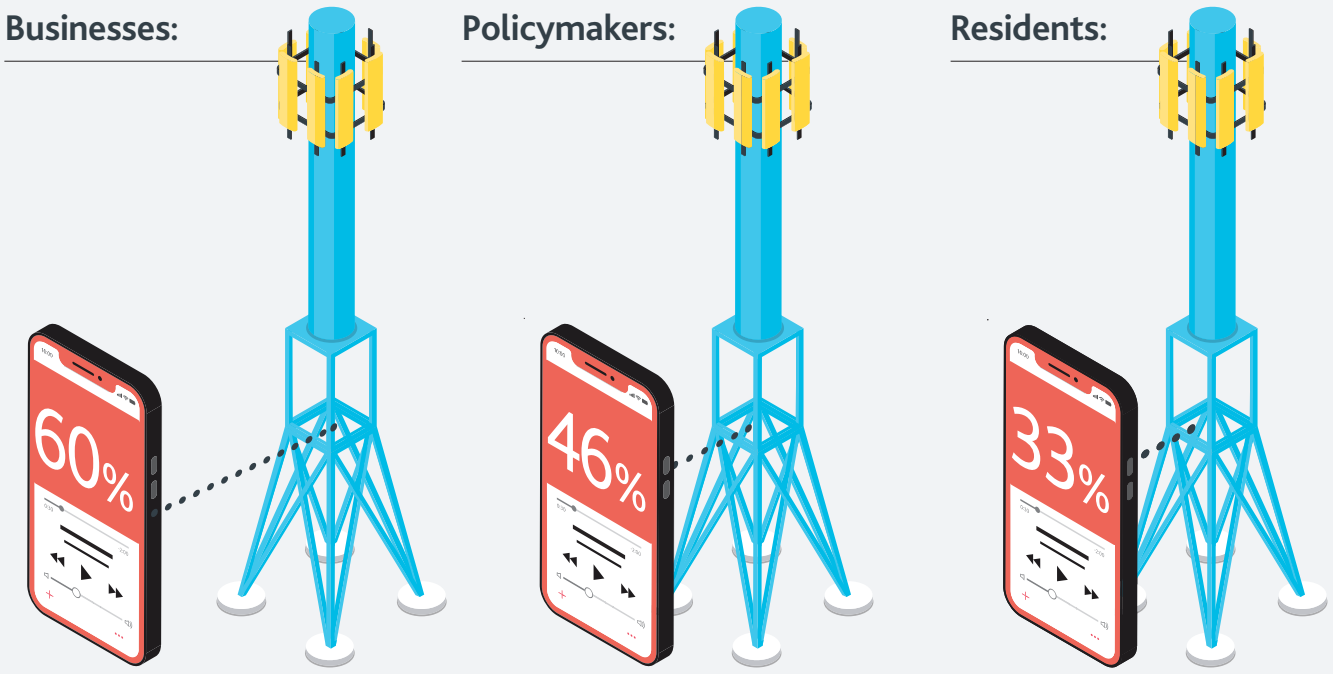
Darren Zitren, Head of Digital Connectivity at Cluttons, highlights on page 19 how commercial and residential landlords and investors are now more aware than ever about the level of connectivity they need to provide in their buildings to attract and retain tenants.

However, when it comes to residents or constituents, the disconnect is clear. Only 33% of MPs said that residents understood the link between good connectivity and the infrastructure needed to provide it. This has ramifications when it comes to planning – something which we examine on page 15. Indeed, when asked why they thought there was a problem in the understanding around the infrastructure needed for connectivity, nearly 60% of MPs who believed there was a disconnect said that people did not see planning decisions about where to put masts and cables as relevant to how good connectivity is on their devices.

While updated planning rules are being proposed in the Planning and Infrastructure Bill, with further changes mooted in the Infrastructure Strategy, it remains the case that ultimately transparency about what is needed in terms of infrastructure can only help to smooth the path to a faster roll-out.

Nearly 60% of MPs say launching a Government-led information campaign on the benefits of enhanced digital connectivity and drawing the link between good connectivity and the infrastructure needed to provide it is important to help the country to meet its own connectivity targets. We agree with this assessment and call for a Government-funded information campaign.

Net proportion of MPs confident that each of these groups understand the relationship between good connectivity (fast, reliable connections) and the infrastructure (phone masts, cables) needed to provide it:



Source: Cluttons, YouGov, April 2025

2 Planning ahead

- **Positive moves on planning in the Infrastructure & Planning Bill, but no direct mention of digital infrastructure**
- **Infrastructure Strategy had more welcome detail on the importance of infrastructure**
- **We are calling for swift clarity and implementation of planning changes**

The planning system in England is under pressure. Resourcing in Local Authority (LA) planning departments has been cut, and there are more demands than ever on planners to deliver not just digital infrastructure but homes, factories, offices, schools, hospitals and all the other buildings and infrastructure that underpins society.

The Government has pledged an additional 300 planners by the end of 2026 across English LAs, and it has also proposed some significant changes in its new National Planning Policy Framework (NPPF) and Planning and Infrastructure Bill which could streamline all planning processes. One key change that could have an impact on digital connectivity is a return to a regional (rather than local) approach to planning. As devolution continues across England, this means more responsibilities for these Spatial Development Strategies will fall to Mayoral Combined Authorities and Mayoral Combined County Authorities.

When we add in the 'digital first' approach outlined in the Infrastructure Strategy in June 2025, as well as a pledge that digital infrastructure will be a core part of Spatial Development Strategies, it means Mayors will have responsibility for, and ability to, implement the right infrastructure to deliver really good connectivity. John Duncan from The GMCA explains on page 17 how a local approach can help break down barriers and smooth the roll-out of infrastructure.

The Infrastructure Strategy included a more detailed and focused examination of digital connectivity and infrastructure than any Government document released in recent years. It also included some welcome, and detailed, pledges including immediate implementation of the full Product Security and Telecommunications Infrastructure Act (PSTI), sometimes referred to as 'the Code'. A consultation on transition arrangements for the Code has also just closed, so it is the perfect time to implement these pledges. The industry has welcomed the promise, which will enable an acceleration in renewing and expanding standalone 5G mobile infrastructure. The question now is how soon the changes will be implemented.

The Strategy also announced a call for evidence on changes to planning laws that could enable faster roll-out of fixed and mobile coverage, and bringing forward a more flexible permitting system for street works across England in line with ongoing pilot schemes. These pledges are a welcome recognition that something does need to change to speed up the roll-out of the connectivity we need to future-proof the country – and now time is of the essence.

A connectivity timeline, also promised in the Infrastructure Strategy will come during the summer.

71%

of MPs think a more supportive planning system is important to support the UK meeting its own 5G goals

Source: Cluttons, YouGov, April 2025

An average of around 50% of MPs we surveyed said they weren't confident that people understood the link between good connectivity and infrastructure to provide it. In part one we asked for an information campaign to help bridge this gap, but amending the planning system to smooth the path to collaborative agreements will also play a large part. Some 71% of MPs think such a move is important, especially to meet 5G goals. With the clock ticking to ensure the UK is making enough progress to take advantage of the huge leaps in AI and other tech-based services, speed is now of the essence.

"Skills must be treated as core infrastructure. That means coordinated action from government, industry, and education to ensure we have a pipeline of talent that's ready for both current demands and future innovation."

Charlotte Goodwill, CEO The Institute of Telecommunications Professionals (ITP)

3 People power

- **Digital Placemakers or Champions bring stakeholders together, fostering collaboration**
- **Devolution in England creates the chance for Digital Placemakers to create direction at a regional level, with Mayors playing a significant role**
- **Central funding should be made available for Digital Placemakers**

The proportion of MPs who believe that Digital Placemakers have a role to play in helping speed up roll-out has climbed since last year. Some 70% of MPs identified these roles as important in this year's survey, compared to 49% in 2024.

Only around 42% of LAs currently have a dedicated Digital Champion, according to a report by Farrpoint. An additional 34% had someone with that title but where it was an 'add-on' to an existing role. But as our survey of councillors showed last year, there is confusion around what the remit for a Digital Champion is. We have always been clear that we believe this is a strategic role, bringing stakeholders together at a local level. This may be stakeholders from inside the LA, for example, the planning department and the highways department, or bringing these collaborators together with industry to help discuss and overcome challenges that may be slowing down the delivery of infrastructure to support high quality connectivity.

The fact of having a Digital Placemaker also means that those stakeholders active in a local area have someone to contact when there are issues. This can also speed up progress.

Last year we called for central Government funding for Digital Placemakers, and we re-issue that call this year. However, it may be that in England this funding is delivered alongside wider funding as part of devolution. At the end of last year, Angela Raynor, the Deputy Prime Minister, said: "We will get councils back on their feet, by providing longer financial stability, strengthening standards, streamlining structures … we will give Mayors strong new powers over housing, planning, transport, energy, skills, employment support and more, backed up with integrated and consolidated funding." Could the roll-out of essential digital infrastructure to future-proof the country be considered among these priorities?

Digital Placemaker

The terminology around Digital Placemakers has changed. Last year, we referred to Digital Champions, but as we found from our survey of local councillors and from other conversations and feedback, this can cause confusion when it then comes to defining what the role should encompass. Our survey showed that more than a third of councillors did not think it was a strategic role. While digital inclusion is a key priority, and should definitely be included in any remit, some Digital Champions only focus on this area. Instead, describing the role as a Placemaker is gaining currency, highlighting the wider remit of the role all stakeholders involved when places and communities are being imagined or reimagined locally. In Wales, they have taken this step further. A report on removing barriers to delivering digital infrastructure commissioned in 2022 recommended that Digital Champions should be appointed at LA level – but made it very clear there were two types: an Infrastructure Digital Champion, focused on bringing stakeholders together, and a Community Digital Champion, focused on community inclusion. As an example, there are eight Digital Champions across four LAs in Wales, involved in the Swansea Bay City Deal, a joint UK Government and Welsh Government scheme for £1.3 billion investment and they are playing a key role in the digital infrastructure programme.

70%

of MPs say creating or identifying Digital Placemakers in LAs in a strategic role to foster collaboration is important to support the UK meeting its own 5G goals **

Source: Cluttons, YouGov

Some Mayors and LAs are well underway with their plans to ensure that the right digital infrastructure for their communities is in place. Mayor Andy Burnham and the Greater Manchester Combined Authority (GMCA) created a Digital Blueprint for Greater Manchester in 2023, and in it there is a key pledge to create connected, inclusive, sustainable places by building out world-class digital infrastructure. In the West of England, Mayor Helen Godwin and the West of England Mayoral Combined Authority have established a Digital Office, to provide guidance, data and support to deploy digital connectivity infrastructure.

If creating new government funding for information campaigns and Digital Placemakers is a stretch due to Treasury finances, an alternative could be to ringfence a small proportion of the R&D funding that is set to be distributed to Mayoral Strategic Authorities in England and potentially Wales, Scotland and Northern Ireland. As we have stated in this report, we welcome the move to more regional and Mayoral-led strategic planning, so this move on R&D funding is welcome. Using this funding to future-proof digital connectivity would serve to make the remaining R&D funding more effective as the R&D projects would be supported by solid digital infrastructure designed to cope with ever increasing data demands.

As more Mayors are created across England, we are calling for digital infrastructure and connectivity to have a place on their list of priorities. As can be seen in the box to the left, Digital Champions in South Wales are already playing a critical part in a wider £1.3 billion programme investment in the region.

** full question: How important, If at all, do you think these factors are to support the UK meeting its own 5G goals? Creating/identifying digital champions/placemakers or engages specialists in Local Authorities in a strategic role to foster collaboration between departments and external stakeholder and speed up roll-out

INTERVIEW

Digital placemaking in action

John Duncan

Connected Places Lead for Greater Manchester Combined Authority (GMCA)

Cluttons believe Digital Placemakers or champions have a key role to play in ensuring that digital infrastructure is in place to support the needs of households, businesses and the public sector now and in the future, and we have highlighted this in our research over the last few years.

We believe that Placemakers based in Local Authorities (LAs), or across several Authorities, have a crucial role in easing the path for a faster roll-out of digital infrastructure. They lend expertise and insight on all aspects of connectivity, and can bring stakeholders together, both public and private sector, to take strategic decisions on how best to serve communities.

We spoke to John Duncan, Connected Places Lead for the Greater Manchester Combined Authority (GMCA), about his role, and being a trailblazer for digital placemaking. John started the role last year after nearly three years as Digital Inclusion Programme Manager at GMCA and before this he had years of experience working for a leading telecoms and fibre provider.

His comments around collaboration are key to how Digital Placemakers can make a real difference.

He says: "We have an advisory group – the Digital Infrastructure Advisory Group – the major fibre operators, the Alt Nets, and the mobile network operators are all involved, which is very helpful. This means we can update them on the work we are doing, and then they also have someone to approach to explain what their plans are, especially if there are hurdles which we can discuss. At the same time, we are developing relationships with Housing Associations, and we can act as a conduit for any blockers or barriers they are having from a connectivity angle. Essentially, we have convened a group where the members can share the challenges they are facing, and we can help deepen understanding on both sides, which can smooth the way for future collaboration and faster results."

As John goes on to explain, the role of a Digital Placemaker is also to collaborate internally within a LA or Combined Authority. He gave an example of helping planning teams by sharing information about how some aspects of connectivity work, information that they can then use in their decision-making process. "In some cases it's to support planning teams who want to find out more about some technology to help them in their work, for example small cells for mobile. My colleagues have been able to facilitate that."

He says the key to a successful Digital Placemaker is "strong foundations" in the LA or organisation. "The foundation we have is the GMCA Digital Blueprint which is a very clear strategy that sets out how we position GMCA as a leader in connectivity. Then we have a wider planning strategy called Places for Everyone with 10-year objectives. All the infrastructure work that we are focusing on fits into that strategy, and make that very clear."

Support within the Authority is also key. "There are 10 directors of place working across the GMCA and they are all very supportive, and that has allowed us to do a pilot programme in Bury creating a digital place plan. I've also worked with colleagues who might not necessarily know about digital infrastructure, and there is an appetite for information and more support in this area."

> "If you've got the core infrastructure there to deliver the best digital connectivity, then it will generate economic growth"

The upsides for Combined Authorities and Local Authorities who get this right are big.

John says: "My message is, if you've got the core infrastructure there to deliver the best digital connectivity, then it will generate economic growth. At the same time, it works for the inclusion agenda. If we are connecting more people up, people who are struggling with digital exclusion, then we can help them cross that divide and participate more in an increasingly online world."

When we asked John what he would ask for if he could have one thing over the next year, from something in the local community to policymakers at Westminster, he said: "I would have a very long list! But if pushed, I would say a Digital Placemaker in each of the 10 Local Authorities I work with as part of the GMCA. The funding to have that role in each LA would mean further reach for the work we are doing, which we know leads to more investment, better productivity, economic growth, and, more importantly, better outcomes for everyone in the Greater Manchester area."

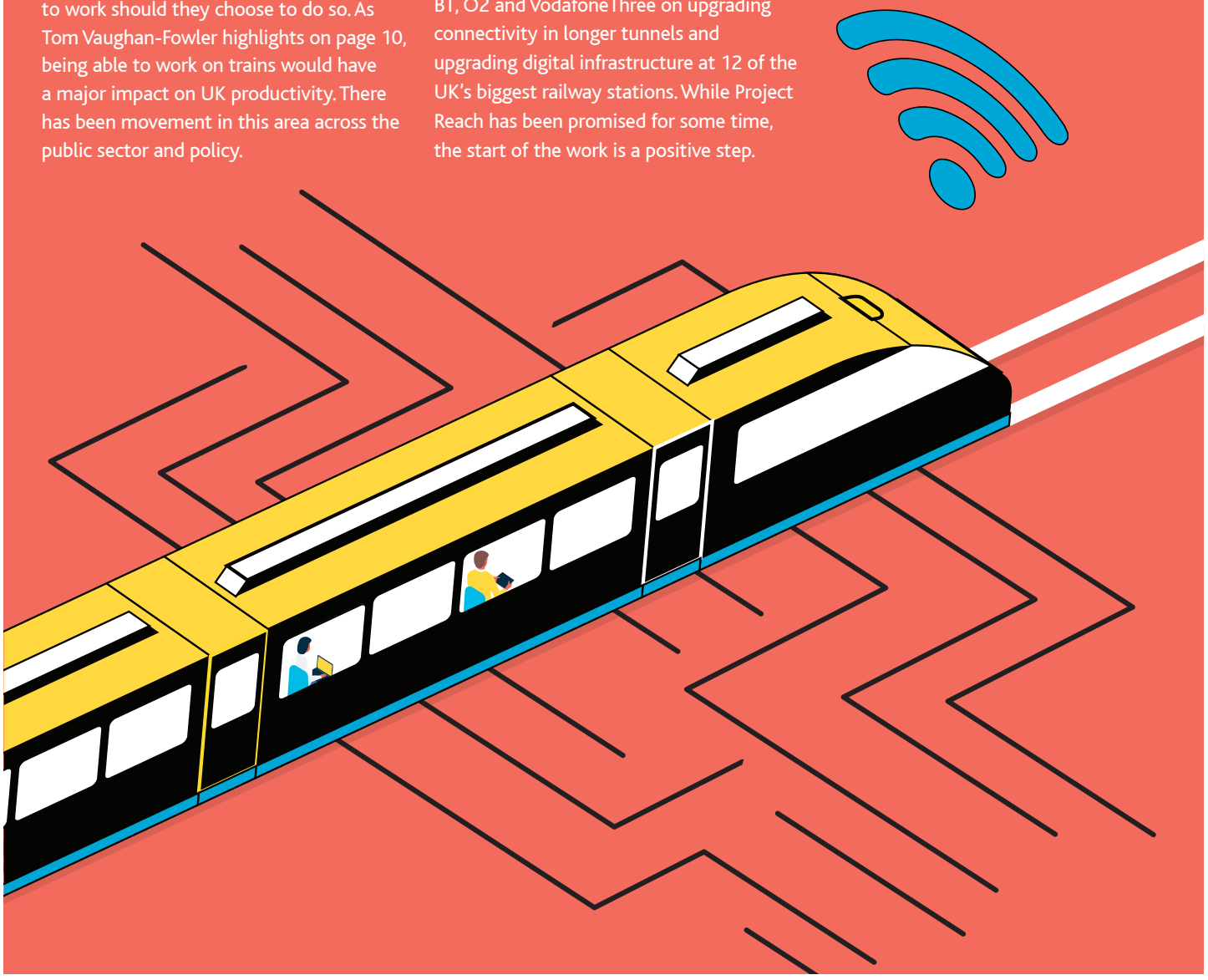
On the move

The number of commuters with rail journeys to work of at least 90 minutes doubled following the pandemic, according to research from Trainline. The changes in working practices during and after the pandemic led many office-based workers to move away from their place of work and work remotely. Even for those only travelling to the office two days a week, such super-commuters still spend the equivalent of two and half working days on the train each month. Yet on many rail lines the quality of internet connection is not reliable enough to allow these commuters to work should they choose to do so. As Tom Vaughan-Fowler highlights on page 10, being able to work on trains would have a major impact on UK productivity. There has been movement in this area across the public sector and policy.

In late June, Network Rail announced Project Reach, a scheme running from 2026 to 2028 to run 1000 km of ultra-fast fibre along parts of rail the lines which connect Manchester, Newcastle and Cardiff to London. The project with Neos Networks will boost 4G and 5G connectivity and Network Rail says it plans to expand Project Reach to more than 5000 km of track 'in the near future'.

A separate project with Freshwave will focus on eradicating connectivity blackspots in 57 tunnels, working with BT, O2 and VodafoneThree on upgrading connectivity in longer tunnels and upgrading digital infrastructure at 12 of the UK's biggest railway stations. While Project Reach has been promised for some time, the start of the work is a positive step.

At the same time, the National Infrastructure Strategy confirmed £41 million in investment to introduce low-earth-orbit satellite connectivity on all mainline trains, another move which will improve connectivity for passengers, and, when it comes to super-commuters, ultimately increase productivity.



The final word

Darren Zitren

Head of Digital Connectivity, Cluttons

Our report highlights that some progress has been made in the roll-out of fibre broadband and 5G across the UK, with some welcome recognition of the challenges for this sector in recent policy proposals. However there is still a way to go before we are 'there'.

As we examined on page 5, despite a rise in 5G coverage across the UK, and more sites offering standalone 5G, which delivers more capacity, the UK fell in the rankings of mobile download speeds globally last year, and remains outside the top 40, as it does for broadband speeds.

The benefits of good connectivity for the UK are clear across this whole report – from the positive local impacts for businesses and the economy, to the MPs reporting that constituents prize good connectivity through our survey. At a national level it is critical to boost economic growth.

In July 2025 the importance of good connectivity was further underlined by Wes Streeting, the Health Minister, announcing that single patients records, accessed via the NHS app, would become 'critical national infrastructure'. The app will be completely reliant on good connectivity.

At the same time, the UK must also consider its place in the international landscape as it competes for investment against global competitors. In fact, when we asked MPs what steps were important to support the UK to meet its 5G goals, nearly three-quarters said closely monitoring the UK's performance in a global setting is important.

Landlords and investors are also increasingly aware of the clear demand and need for better connectivity for their residents and, or, their business tenants. However, the picture on the ground across multi-asset portfolios can be more challenging.

We are increasingly being approached by landlords who are keen to upgrade the fibre and mobile connectivity of their buildings but are finding that they are having to juggle negotiations with different providers depending on the location of their assets, and, on occasion, having to approach Alt Nets (alternative networks) for smaller multi-dwelling units (MDUs) to ensure upgraded connections.

Upgrading may involve multiple negotiations and conversations, and this is an area where we have helped landlords in recent years, across all portfolio sizes and all geographies. The Government's Infrastructure Strategy included a pledge to consult on ways to make it easier for leaseholders in blocks of flats to access gigabit connectivity. This highlights that demand from residents is likely to rise.

On a policy level, we now need words to turn into practical steps to ensure we achieve the roll-out of the infrastructure needed to support the best connectivity. And for landlords and investors, the need to engage early around connectivity will only become more pressing.

73%

of MPs said it was important for the Government to monitor the UK's performance on 5G availability and download speeds compared to global competitors to support the country meeting its own 5G goals.

Source: Cluttons, YouGov, April 2025

For further details contact

Digital connectivity

Darren Zitren
Head of digital connectivity
+44 (0) 7889 640 737
darren.zitren@cluttons.com

Philip MacCabe
Partner – digital connectivity
+44 (0) 7484 475 137
philip.maccabe@cluttons.com

Jamie Merrell
Partner – digital connectivity
+44 (0) 7525 632 586
jamie.merrell@cluttons.com

Danny Sherman
Partner – digital connectivity
+44 (0) 7860 188 105
danny.sherman@cluttons.com

Rachael Hogg
Partner – digital connectivity
+44 (0) 7927 563 212
rachael.hogg@cluttons.com

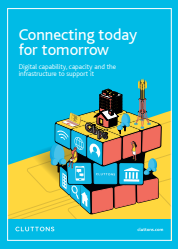
Sarah Gibbs
Partner – digital connectivity
+44 (0) 7971 809 409
sarah.gibbs@cluttons.com

Oliver Billson
Associate – digital connectivity
+44 (0) 7970 540 026
oliver.billson@cluttons.com

Research

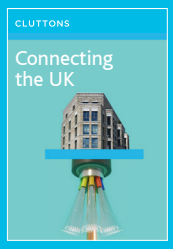
Gráinne Gilmore
Head of research and insights
+44 (0) 7967 271 321
grainne.gilmore@cluttons.com

Recent research publications



Connecting today for tomorrow

Connecting today for tomorrow



Connecting the UK

Cluttons UK Offices

Survey data based on YOUGOV poll of 108 MPs carried out between 1-28 April 2025, survey weighted to reflect seat counts in Parliament.

Cluttons LLP
Yarnwicke
119-121 Cannon Street
London EC4N 5AT