



# Connecting Cornwall

Demonstrating the Value of  
Improved Connectivity



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# Foreword

Wildanet was formed with a definitive mission in mind:

**“We are connecting people, communities, and businesses,  
wherever they are in Cornwall and the South-West  
for the best digital present and future.”**

Wildanet is committed to addressing the digital divide by working constructively with local government, communities, consumers and businesses in the South West, alongside central government. As a local company, we have a wealth of expertise in providing digital gigabit capable communications to rural and hard-to-reach areas. We also make use of the range of government schemes, including grants and vouchers, to offset the increased cost of these complex connections to more remote areas.

As such, we have engaged with our independent partner, Curia, such that we can determine and quantify accurately our social, environmental and economic value for Cornwall and the South West. The Wildanet model is benchmarked against nationally recognised data and is informed by a thorough review of all pre-existing evidence. This research piece offers an exciting opportunity to identify effective solutions to digital exclusion, and how to ensure the necessary infrastructure is in place to incentivise further investment from a range of sectors in the Cornish and South West economies.

It should be stressed that nothing like this has been done before.

As an innovative and fresh-thinking Alternative Network, we see our attempts to provide numerical and financial qualification of the value we provide locally as a clear demonstration of our credentials as a thought leader in the field of digital inclusion. Our unique knowledge and insight, informed by this research, has also allowed us to develop new solutions and innovations which will address the social imperative of digital inclusion as a driver of regional economic growth.

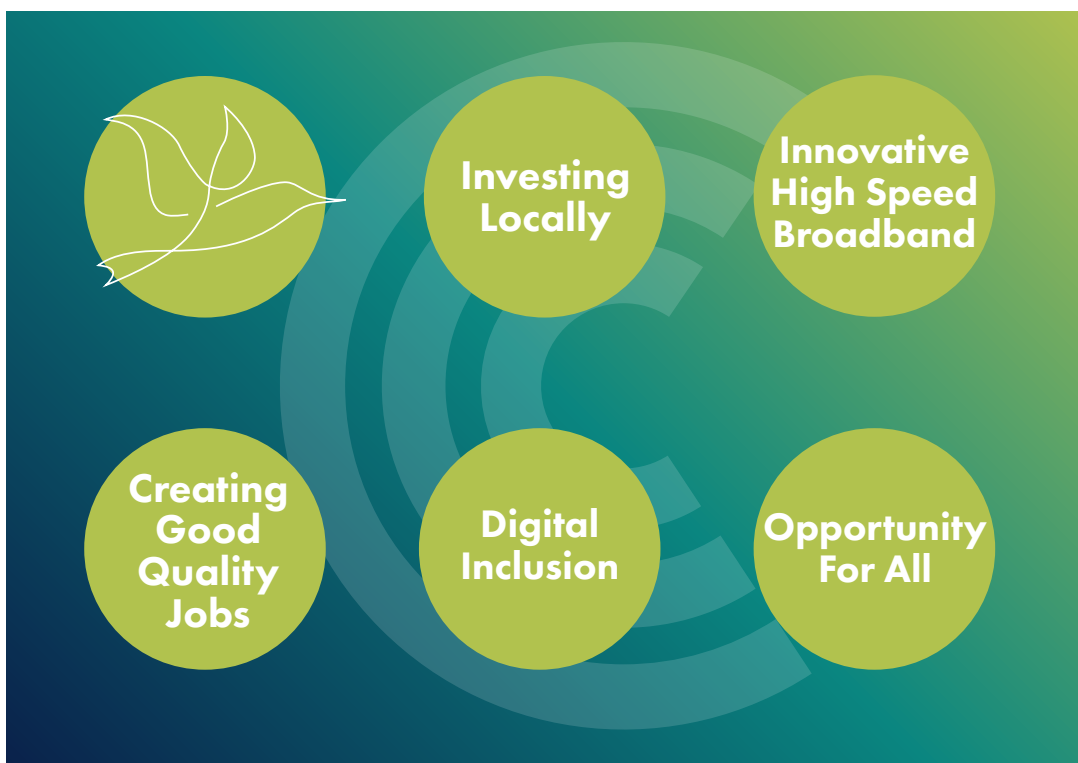
Since being appointed as CEO, I have witnessed first-hand the positive impact reliable local connections can have on individual residents, businesses, and the local economy. I am delighted that this research provides a clear quantitative analysis of this impact, which I hope will reenergise efforts to increase connectivity, and provide new industries with the confidence to invest in the South West.

This report is designed to inform and complement our strategy and, in our humble opinion, help us to assist Cornwall and the wider South West community utilise better digital connectivity. This will, in turn, drive greater social inclusion and regional economic growth, such that with Wildanet all our customers can truly communicate

**“from anywhere, to everywhere”.**



**Helen Wylde**  
**CEO Wildanet**



## Wildanet in numbers

**/ £50million**

Investment in Wildanet to create a new high-speed broadband network

**/ 40x faster**

Delivering gigabit broadband with speeds approximately 40x faster than the average speeds in Cornwall. Wildanet will deploy a gateway router capable of 2.4Gbps later this year.†

**/ 100+ employees**

Creating a business with over 100 direct employees by the end of 2022 and opportunities for many more indirectly

**/ 62,000**

62,000 people in Cornwall have never used the internet\*

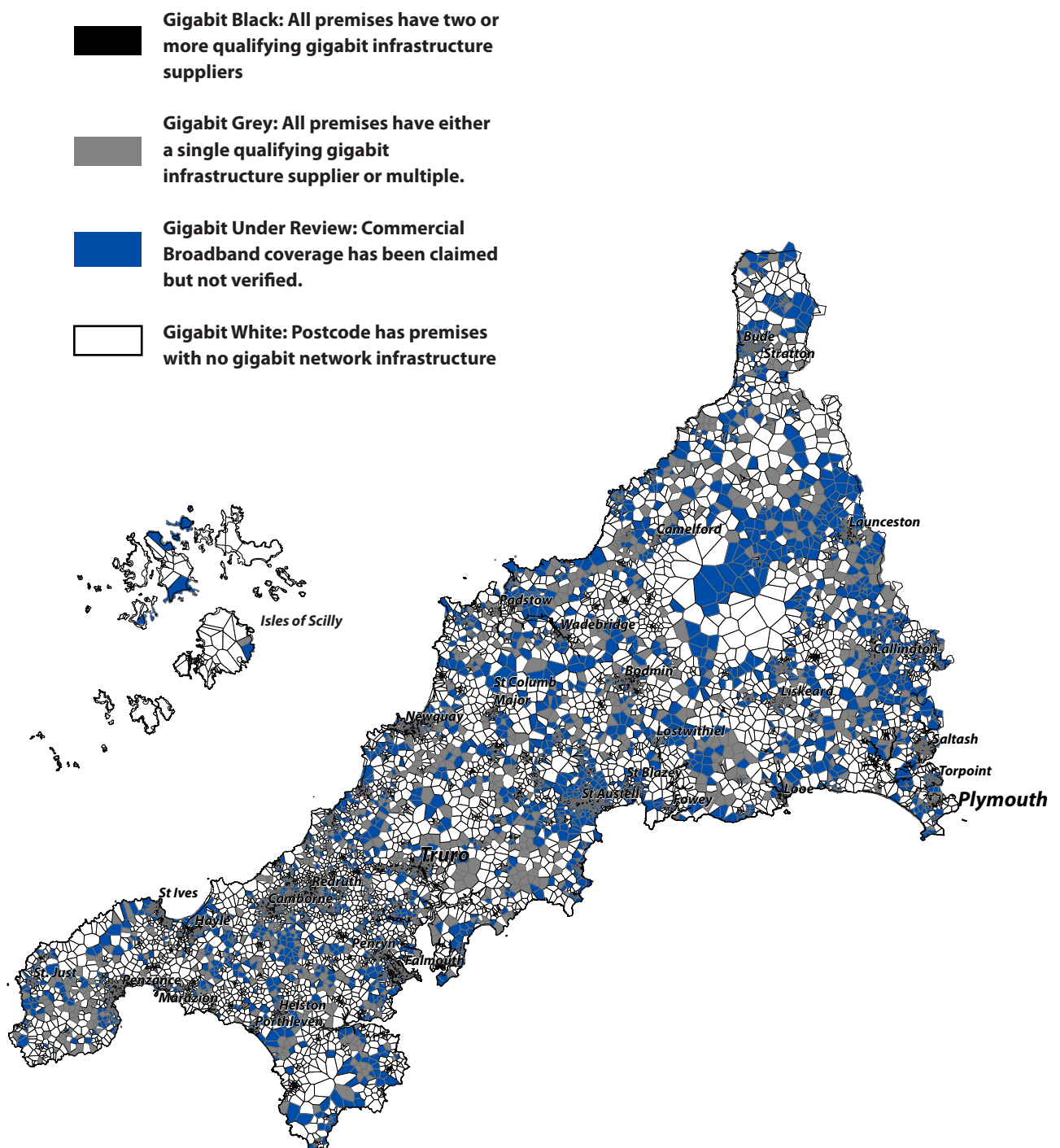
**/ 78,000**

78,000 people in Devon have never used the internet

\*Source ONS, Internet users in the UK 2020, published 6th April 2021, tabs 5a and 5b.

† Average download speed in Cornwall is 53.2mbps.

# UK gigabit programme for Cornwall and Isles of Scilly

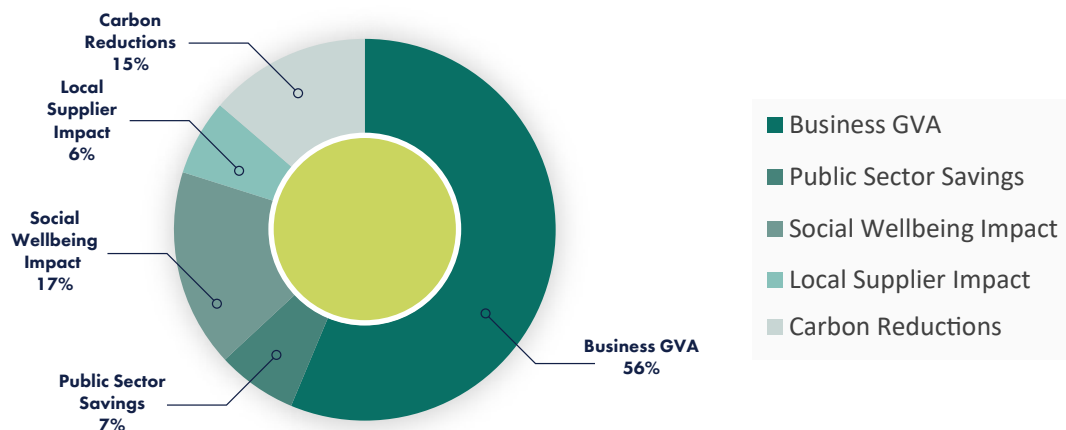


\* Source: DCMS UK gigabit-programme for Cornwall and Isles of Scilly Public Review, February 2022



## Headline Findings

### Annual Value by Gigabit Broadband Total: Over £70m



### In Cornwall, gigabit-capable broadband could generate:

**£615 million** of new Gross Value Add and **£111 million** GVA safeguarded per annum by 2030.

a projected **£222.25** impact on wellbeing per household, per annum.

**£101 million** of equivalent carbon taxation between 2020 and 2030 (**£50.5 million** between 2020 and 2025 and **£50.5 million** between 2025 and 2030).

*\* Calculations can be found in the full Measuring the Future Impact of Gigabit Broadband in Cornwall report*

# Executive Summary

Alongside this briefing paper, in partnership with NGD Advisory Services, Curia has published a supporting document which explores the economic, social and environmental impacts of future gigabit-capable broadband speeds across the county of Cornwall. These increased speeds will build on the success of the Superfast Broadband Programme initiatives in the decade between 2011 and 2021.

In that period, Superfast Broadband coverage grew to cover 96 per cent of premises and made an evaluated impact of 5,300 new jobs (8,410 safeguarded) and £235.8 million Gross Value Added (GVA) (£374.4 million safeguarded in Cornwall).

However, the predominant technology that is deployed, continues to use old (copper) infrastructure which will always limit the potential speeds, resilience and benefits for both existing and future generations. Recognised by the Government and also the market, an extensive new phase of full-fibre and gigabit-capable broadband rollout and intervention, has commenced. Project Gigabit is a £5 billion intervention programme which is intended to stimulate the broadband market and local authorities into delivering new gigabit infrastructure to areas where it wouldn't normally have been possible, leading to a coverage of 85 per cent of premises nationally. Cornwall has been successful in becoming one of the first areas to secure government funding, meaning a new procurement phase for gigabit coverage to 19,250 premises commenced in March 2022. Currently, the county of Cornwall has 46 per cent gigabit capable coverage, compared to a UK national standing of 66 per cent. This figure shows clearly that large urban communities have historically provided the most obvious economic target for communication providers, but rural areas are now the focus for government funding and service providers.

The case for gigabit capable broadband is compelling and has been accelerated by the consequences of the Covid pandemic, with home working, video communications, remote services and direct retail operations creating an unprecedented demand. In a business environment, especially in small to medium sized organisations, the availability of high-bandwidth, resilient and affordable communication services is essential and this helps to underpin turnover growth, productivity, new jobs and investment.

In recent years, other studies have highlighted the social and environmental benefits of improved infrastructure, such as digital inclusion, education and skills, health and wellbeing and de-carbonisation, towards achieving net-zero targets. There is also significant new potential for inward investment, business start-ups, scale-ups and higher value jobs for Cornwall. Post-pandemic, the changes in remote working and in re-thinking office space and location, presents a significant new opportunity for GVA growth, diversification and productivity.

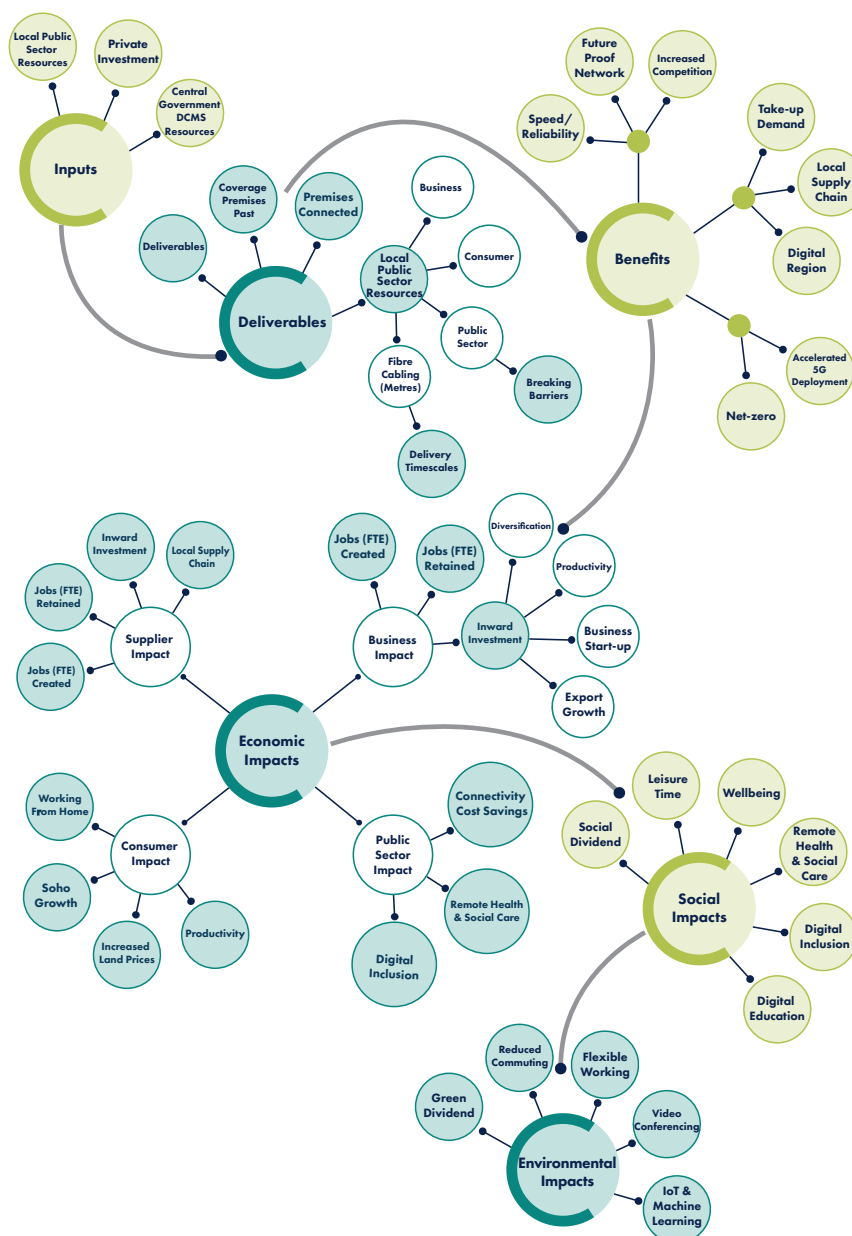
Other regions in the UK and internationally have forged ahead with gigabit capable coverage, notably in Northern Ireland and Greater Manchester. The role of government intervention and local service providers cannot be underestimated in these cases. Where three or more infrastructure providers are building, the faster and better coverage is apparent and along with this come the associated benefits. The presence of a local service provider with investment and focus, will create added impetus and benefits similar to those with Fibribus in Northern Ireland and Lightspeed in the East of England. This creates genuine competition, local purpose and attention and a practical difference on the ground - where community engagement, events and support can make a significant difference to service take-up and inclusion.



# Impact of Gigabit Broadband on Cornwall Model

NGD Advisory Services and Curia have developed a model to measure the future impact of gigabit broadband in Cornwall, (see Figure 1 below) assessing the full economic, social and environmental impact of this new technology and its benefits.

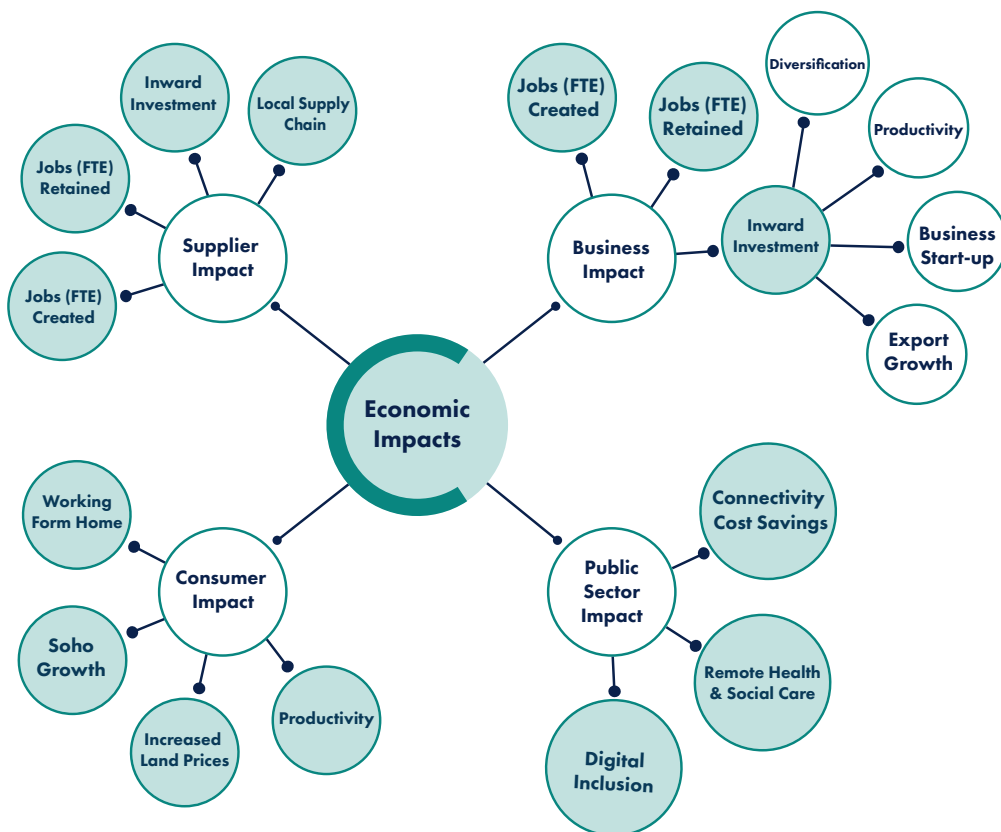
**Figure 1: Model to evaluate the impact of Gigabit Broadband on Cornwall\***



*\*Assumptions to generate the model can be found in the full Measuring the Future Impact of Gigabit Broadband in Cornwall report*

# Economic Benefits

Figure 2: Economic Impacts Model



## Business GVA

- Faster broadband stimulates productivity growth, increased sales, diversification and export potential.
- Gigabit-capable broadband accelerates the growth of small office and home office start-ups, sole traders, relocations, flexible working and new teleworkers securing jobs remotely or relocating to the county. All of which means jobs are both created and safeguarded.
- Gigabit broadband drives new business services and innovation – including video communications, cloud computing, CCTV and security and Internet Of Things (IOT) - with no limitations on the number of users or company network access.
- This can create £615 million of new Gross Value Add (GVA) and £111 million GVA safeguarded per annum by 2030. With 46 per cent of the county having gigabit broadband available today, this impact has been started but it is vital that the whole county is able to benefit and that all county businesses can benefit, for true levelling-up opportunities. This compares to £609 million GVA impact with superfast broadband by 2020.

### Public Sector Cashable Savings

- More affordable connectivity for public sector office locations (small to large) should release c.£5 million of cashable savings per annum, whether achieved individually by organisations or preferably through new combined procurements to secure the savings.

### Public Sector Digital Healthcare Savings

- Opportunity to expand Technology Enabled Care and Digital Health Service Monitoring services, thus reducing the need for face-to-face healthcare for routine or observation appointments.
- Cornwall acts as a microcosm of the UK healthcare system, so with improved connectivity the county will become a perfect place to test and launch new digital healthcare solutions.
- Cornwall provides a unique opportunity to engage with the NHS and work directly with their clinicians and researchers.
- Care monitoring alarms will require replacement by 2025 as BT switches off its analogue network. However, new fibre alternatives will provide opportunities for resilience and innovation in these services.
- In conjunction with an integrated plan for digital inclusion and skills, a future plan for remote digital healthcare could generate over £30 million savings per annum across the public sector.

# Social Wellbeing Impact

Figure 3: Social Impacts Model



- A social dividend could be introduced, based on the achievement of an agreed level of take-up (based on gain-share). This would fund future social programmes and digital inclusion.
- There is a projected £222.25 impact on wellbeing per household, per annum. In addition, there is a £1,000 wellbeing per annum value which is created through developing essential digital skills and also a one-off benefit of £807 for those seeking employment, which is typically now done online.
- The combination of these impacts will benefit Cornwall citizens positively by £16.5 million per annum.
- This figure is also consistent with other research which suggests that for every £1 spent on digital inclusion, there is an average return of £15. This includes social, wellbeing and economic impact. (Good Things Foundation)

# Environmental Impact

Figure 4: Environmental Impacts Model



- Digital technology could deliver nearly one third of the carbon emission reduction required by 2030.
- The opportunity to scale-up the decarbonisation already achieved through Superfast Broadband, which reduced Cornwall's carbon footprint by half a million tonnes (between 2011 and 2020).
- Through trends in the ways of working, new technologies and the full availability of gigabit broadband, these discussed impacts can be doubled by 2025 and possibly trebled by 2030, when net-zero achievements will be assessed.
- A further benefit is the potential introduction of a Green Dividend which will be based on the achievement of an agreed level of take-up (based on gain-share). This could be used to fund net-zero and carbon reduction programmes in the future, such as renewable or alternative local energy sources or planting trees. The additional impact of gigabit broadband could be as much as £101 million in terms of equivalent carbon taxation between 2020 and 2030 (£50.5 million between 2020 and 2025 and £50.5 million between 2025 and 2030).

# About



The modern world is reliant on access to the internet, from online banking and prescriptions, to running a business, working from home and having instant access to family, friends and entertainment. More and more public services also rely on the internet, spanning from health services, to educational services, to social care services.

Without reliable access to the internet and the ability to be instantly “online”, many people are simply left behind the modern world. They are unable to access the same basic services and digital experiences that others with better connectivity, take for granted. This then leads to with negative social, mental and financial implications for those concerned.

Yet, in the South West there are still more than 220,000 people aged 16 or over, who have never used the internet\* and more than half of these people are residing in Devon and Cornwall. What’s more, Cornwall and the South West still have countless communities who suffer with poor quality, low speed, internet connections. This makes life harder for many families and businesses in these areas and puts them at a distinct disadvantage to the rest of the UK. Consumers and businesses are shut out as video services, the Internet of Things and machine learning accelerate the need for fast, reliable and secure broadband.

Wildanet is working to change this.

Wildanet is an independent Cornish-based internet service provider. Wildanet is bringing high speed digital connectivity to homes, businesses and communities throughout Cornwall and the South West.



NGD Advisory Services is owned and managed by Jon Reynolds, a former Regional Director in the South West and Wales for BT. He led BT’s regional board, comprised of all the business units across the company, for ten years and has also held positions within BT Wholesale and Global Services.

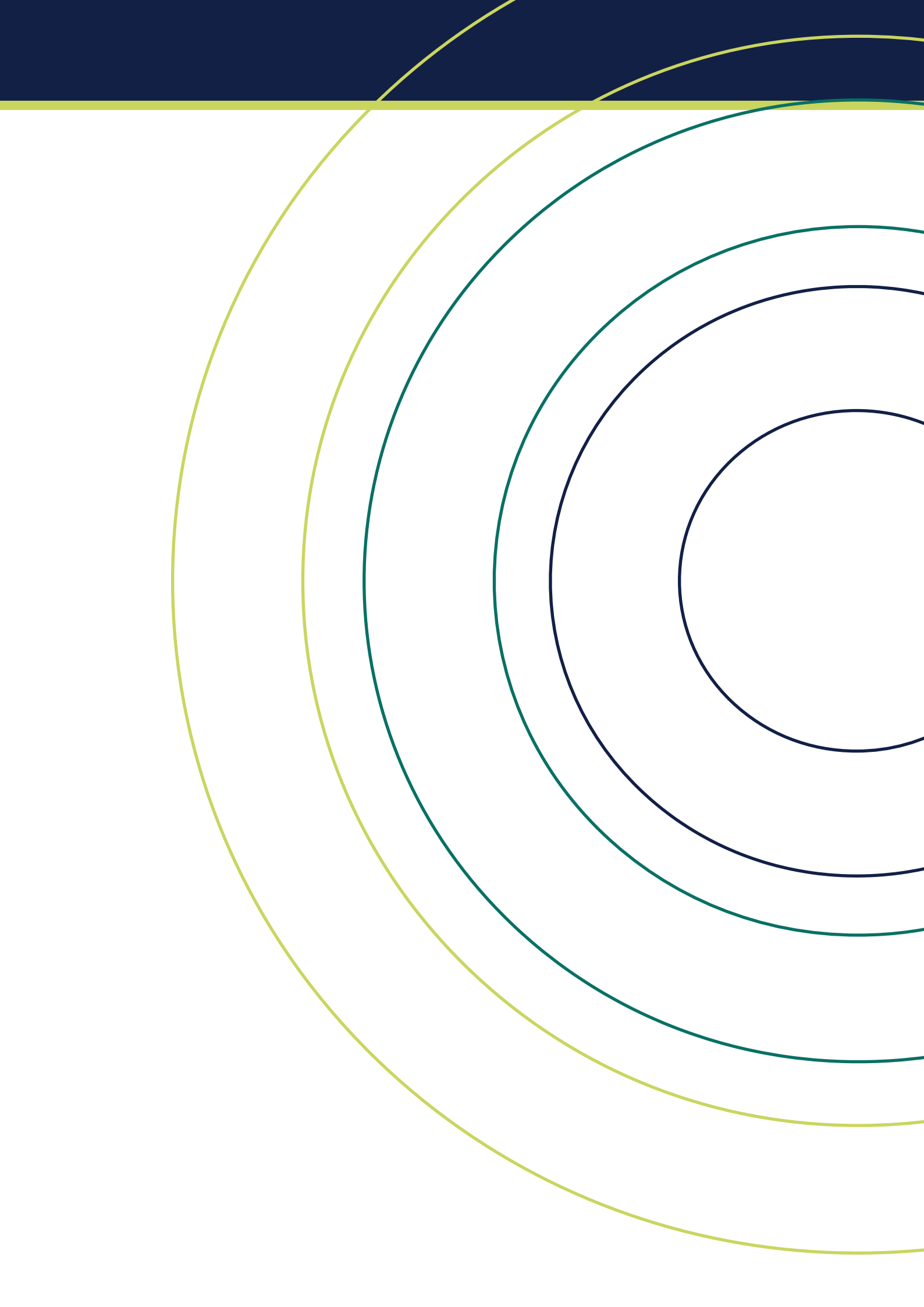
These positions included BT’s leadership of Superfast Cornwall, Superfast Cymru and the largest public sector network contract in the UK, PSBA in Wales. These ground-breaking programmes represented new and innovative digital transformation initiatives, which were subject to BT Board level governance. Jon was also responsible for the annual economic impact assessments for BT in the South West, which evidenced the company’s contribution to jobs, GVA, spend with suppliers, sustainability and volunteering. These assessments included building partnerships across both the private and public sectors, including within academia and numerous digital inclusion projects. Jon has also been the CEO of a digital healthcare technology company, which successfully established new solutions for remote monitoring, digital access and skills. particularly during the Covid pandemic in 2020/21. Jon has built an extensive network of board level and influential contacts and experts across the South West region and Wales and he is a board member for the West of England Local Enterprise Partnership (LEP) and a Visiting Professor at the University of the West of England.



Curia is the UK’s first “do tank”, helping organisations to make change happen. Through innovative research, expert data analytics and leading insight from an operational and decision-maker level, Curia sits between the think tank and the consultancy worlds. Through commissions, Curia provides recommendations on “how” change can become a reality. Governmental bodies from around the world work with Curia to help them transform recommendations into fully functional implementation plans. Using their cross-sector experience, Curia utilises expertise and intelligence that they have drawn from our parent broadcasting company, Chamber UK, to provide a unique insight. Demonstrating measurable change and appraising the progress to make change happen, is critical to Curia’s work.

*\*Source ONS, Internet users in the UK 2020, published 6th April 2021, tabs 5a and 5b.*







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