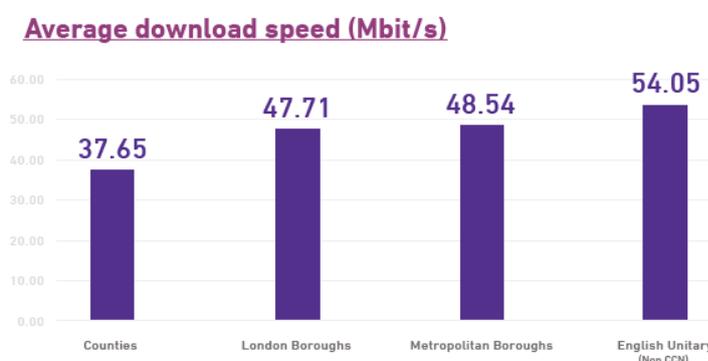


Broadband in County Areas

On 28th March, the County Councils Network (CCN) and Grant Thornton UK LLP launched our joint report [*Capitalising on the Industrial Strategy: how can counties make the most of Britain's economic future?*](#)

In this wide-ranging report, CCN and Grant Thornton analysed the impact of connected counties and delivering infrastructure to support economic growth as part of the role of counties in the Industrial Strategy.

Our analysis we outlined the importance of digital infrastructure, and specifically broadband. Supported by OFCOM data on average broadband speeds, we showed that average download speeds (Mbit/s) are 27% slower on average in counties compared to London boroughs and 44% slower than mainly urban English unitary authority areas.



Source: Analysis of data by Grant Thornton UK LLP from major fixed telecom operators (BT, Virgin Media, Sky, Talk Talk, Vodafone, and KCOM)

Since the publication, CCN has undertaken further analysis at the upper-tier, county and district level of the latest Ofcom data provided by Grant Thornton. The figures referencing individual areas within counties and cities are based on Ofcom data of individual local authorities, collated in May/June 2017 and used in Ofcom's Connected Nations 2017 report. The average county area figures are based on CCN's analysis of average county figures, compiled by Grant Thornton UK LLP based on Ofcom's data.

This short County Councils Network analysis provides an overview of the findings and our response to the findings. This paper provides only upper-tier level data, district level data is available upon request. Please contact ian.burbidge@local.gov.uk for more information.

Key policy findings:

- **Over two thirds (72%) of England's counties are below the national average download speed of 45mbit/s and more than a quarter (27%) have average speeds below Ofcom's definition of superfast (30 mbit/s).** Broadband speeds in rural areas are lagging up to three times slower than neighbouring cities only a few miles down the road.
- **For some counties, it means that their areas have average download speeds that are far slower than large urban and city areas that they neighbour.** For instance, locations in North Yorkshire have an average download speed of 30.2mbit/s, compared to neighbouring York's

average speed of 102mbit/s. Ryedale shares a boundary with the city of York, yet residents and businesses in Ryedale get average speeds of less than one fifth (25.8mbit/s) of those enjoyed in the city. Areas within Derbyshire have an average download speed of 31.6 mbit/s, almost half of that of the county's city, Derby, which has average download speeds of 59.3mbit/s. Just a few miles north of the city, residents and businesses in Amber Valley have average speeds of just 25.9mbit/s.

- **The figures show there is no regional variation to the urban v rural broadband divide.** Rural Dorset (26.9mbit/s) has half the average download speed than urban Gateshead (51.3mbit/s), and less than half the speeds enjoyed by residents and businesses enjoyed in neighbouring Bournemouth (61.2mbit/s).
- **Analysis at district level shows 169 areas in England have broadband speeds below the national average.** Four fifths of these locations (83% are based in England's counties). There are 79 areas in the country that have average speeds below Ofcom's definition of superfast; all but four of these are based in counties. The highest speed in England is 102.9mbit/s in York, whilst the lowest average speed is 21.8mbit/s in West Devon.



Spokesman Media Reaction:

Cllr Philip Akins, Vice-Chairman & CCN Spokesman for Housing, Planning & Infrastructure:

"The government's commitment to provide superfast broadband to as many areas in England as possible has resulted in some significant steps forward in rural connectivity in the last few years. Counties like Staffordshire are working with national and local partners to connect hard to reach rural areas and improve broadband connectivity.

"Counties are great places to live and work, but these figures show that businesses in shire counties and rural areas are being left at a competitive disadvantage. It cannot be right that in some areas, businesses and residents in a city less than 10 miles down the road from a rural county benefit from average download speeds of more than three times faster.

"While the government has announced investment in this area, we remain concerned that digital infrastructure in counties isn't getting the attention it desperately needs.

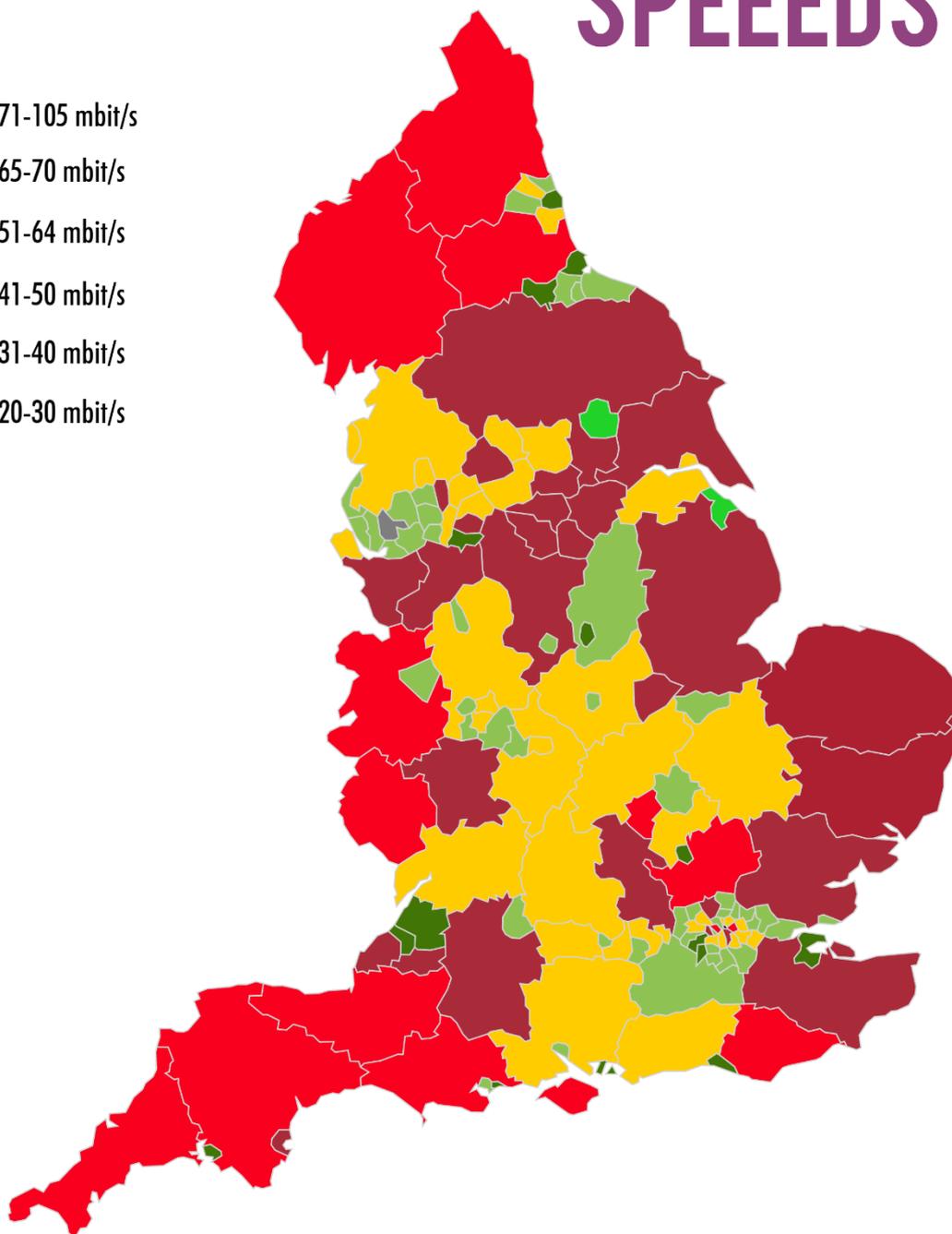
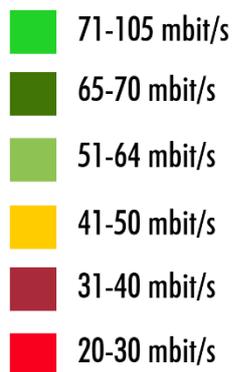
"The ultimate success of the government's Industrial Strategy will hinge on ensuring we drastically improve national productivity in all four corners of the country post-Brexit. This means ensuring we invest in digital infrastructure.

"More investment is only part of the answer; county authorities need to be empowered as 'strategic authorities', alongside city region metro mayors, with devolved powers to drive forward infrastructure investment in their areas. The government's promised 'common devolution framework' is an opportunity to ensure a practical framework for achieving this, placing county authorities as lead, accountable bodies as recommended by leading think-tanks Localis, ResPublica and IPPR."

CCN's media release was covered in the Telegraph, which you can read [here](#).

AT A GLANCE:

AVERAGE BROADBAND SPEEDS



Local Authority	Average download speed (Mbit/s)	Maximum download speed (Mbit/s)
Buckinghamshire	39.9	500
Cambridgeshire	45.5	470
Central Bedfordshire	48.5	1000
Cheshire East	36.5	350
Cheshire West and Chester	32.8	350
Cornwall	24.2	350
County Durham	26.9	200
Cumbria	28.0	387
Derbyshire	31.6	245
Devon	29.0	190
Dorset	29.6	190
East Riding of Yorkshire	39.5	1000
East Sussex	26.9	124
Essex	38.2	298
Gloucestershire	45.9	630
Hampshire	48.8	336
Herefordshire	24.0	100
Hertfordshire	58.1	410
Kent	38.4	401
Lancashire	40.9	475
Leicestershire	47.9	436
Lincolnshire	36.2	359
Norfolk	33.9	244
North Yorkshire	30.4	250
Northamptonshire	48.2	807
Northumberland	25.9	80
Nottinghamshire	54.4	321
Oxfordshire	46.3	870
Shropshire	26.3	350
Somerset	25.3	134
Staffordshire	40.2	304
Suffolk	32.5	216
Surrey	51.2	350
Warwickshire	43.3	330
West Sussex	43.2	233
Wiltshire	38.1	1000
Worcestershire	36.7	235
Averages	Average download speed (Mbit/s)	Maximum download speed (Mbit/s)
County	37.71	392.54
London Borough	47.71	345.45
Metropolitan Borough	48.54	401.39
English Unitary (Non-CCN)	54.05	492.61

CCN View

The Government's commitment to provide superfast broadband to as many areas in England as possible has resulted in some significant steps forward in rural connectivity in the last few years.

Counties across the country are working with BDUK and local partners to connect hard to reach rural areas and improve broadband connectivity, with local examples showing how our members are working to help ensure residents and businesses receive better connections.

CCN have supported the sector's [Up to Speed Campaign](#), led by the Local Government Association (LGA), which aims to ensure every resident and business has access to faster broadband.

However, the figures show that despite progress, businesses in shire counties are being left at a competitive disadvantage. County and rural areas need to have the digital infrastructure to compete with cities and urban areas, otherwise there is a real risk they will not be able to attract the businesses of the future as England moves towards a greater prominence of financial, tech, and communications sectors.

Last year, a report by leading economic forecasters Oxford Economics for CCN warned that county economies are lagging behind the rest of England in those high productivity sectors reliant on digital infrastructure and fast broadband connections, such as information and communications, finance and insurance.

The study concluded that when comparing economic growth in counties to that of England, their information and communications sector make a lower contribution to national growth in counties. The report also concluded that productivity – the measure of how 'competitive' an industry is within a local economy – was already 14% lower, in counties, in the information and communication sector, and 30% lower in the financial and insurance sector, in rural areas, compared to the rest of England.

Oxford Economics argue that to improve productivity and offset future jobs losses, particularly in manufacturing, county economies needed to 'transition' towards a greater reliance on these high-value added sectors in the coming years, supported by specific interventions within the Government's 'Industrial Strategy'.

While the Government has announced investment in this area, we remain concerned that digital infrastructure in our areas isn't getting the attention it desperately needs. This could leave counties lagging behind urban areas post-Brexit. We believe that this shows that a lack of investment in digital infrastructure in counties and disproportionate investment continuing towards cities in the government's Industrial Strategy.

However, more investment is only part of the answer; county authorities need to be empowered as 'strategic authorities', alongside city region metro mayors, with devolved powers to drive forward infrastructure investment in their areas. Counties should have similar powers to drive forward local economic growth as city region metro-mayors, working as 'strategic authorities' alongside Local Enterprise Partnerships.

The government's promised 'common devolution framework' is an opportunity to ensure a practical framework for achieving this, placing county authorities as lead, accountable bodies. Last year, independent reports by Localis and ResPublica set out how strategic authorities could work alongside city regions to deliver devolved powers in non-metropolitan England.

Related documents:

[ResPublica - Devo 2.0: The Case for Counties](#)

[Localis: In Place of Work](#)

[A New Deal for Counties: Devolution, Industrial Strategy & Housing](#)

[Oxford Economics: Understanding County Economies](#)