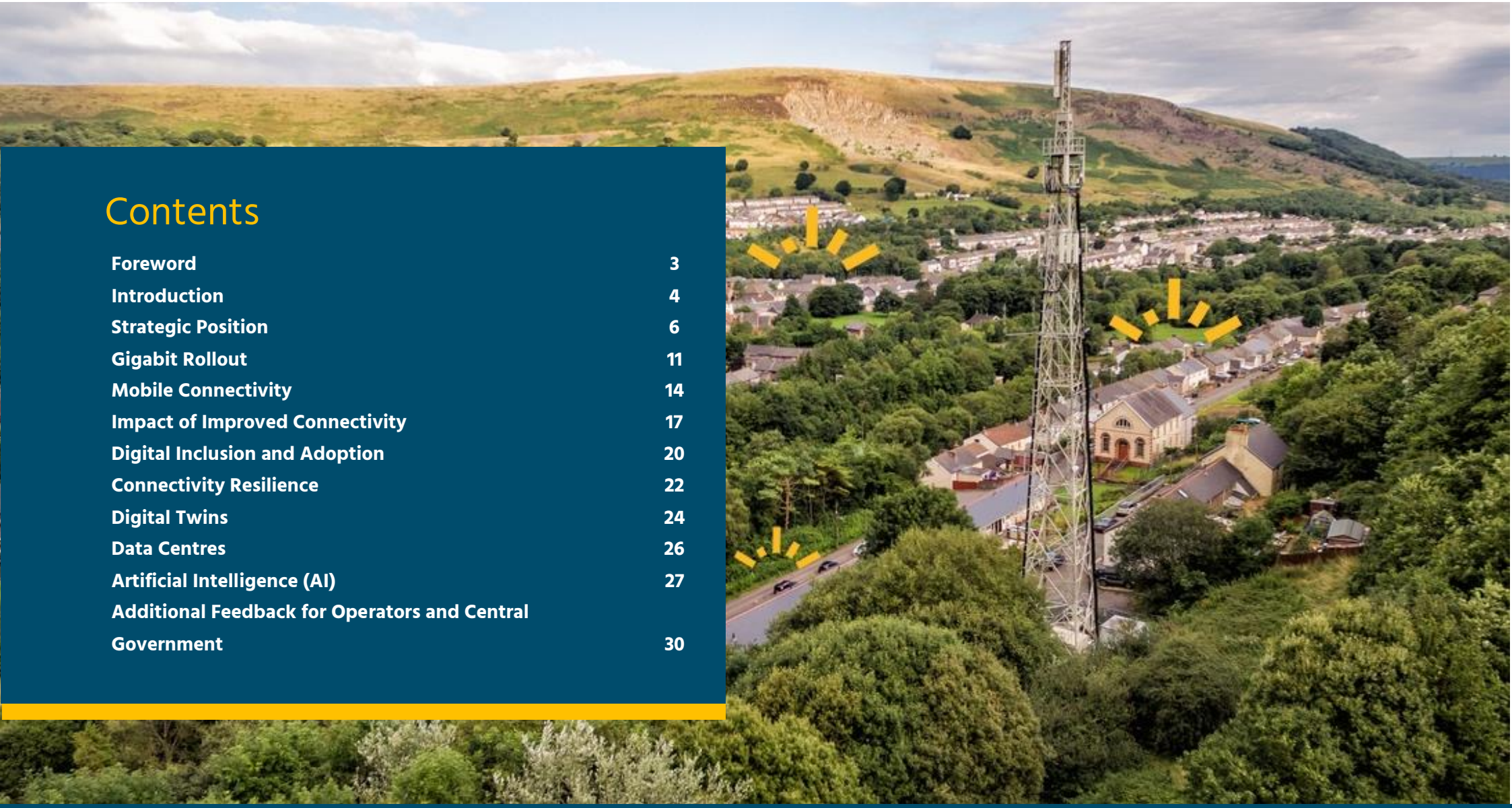
FarrPoint

UK LOCAL GOVERNMENT CONNECTIVITY SURVEY REPORT 2026

FEBRUARY 2026



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Foreword

Freyja Lockwood
Digital Innovation & Transformation Programme Manager
WEST OF ENGLAND MAYORAL COMBINED AUTHORITY

I'm delighted to introduce the 2026 edition of the FarrPoint Connectivity survey report into UK local government digital priorities. As in previous years, the report is packed with must-read insights for local bodies, highlighting where progress has been made and outlining the digital technology and policy plans for the year ahead. It is great to see new themes covered: from AI and data centres to digital inclusion and network resilience.

Having worked in local government for almost a decade, I've seen significant change in the approach to connectivity. It's an essential utility for our lives and a prosperous economy. At the West of England Mayoral Combined Authority, our goal is to support digital transformation whilst ensuring it doesn't leave people behind. Digital connectivity is foundational for our economy and wider ambitions. Without the right infrastructure, communities with poor connectivity will continue to be left behind. But infrastructure alone isn't enough. Connectivity enables people to access better jobs, education and training, and tackle the cost-of-living crisis.

FarrPoint's research was instrumental in shaping our approach. Their analysis demonstrated that fragmented approaches and inconsistent resources across local authority areas make deploying digital infrastructure difficult, expensive, and slow for both telecoms providers and councils, deterring investment. This led directly to the creation of the West of England Digital Office – our dedicated regional coordination function working as a single team with our unitary authorities: Bath & North East Somerset, Bristol, and South Gloucestershire.

By providing a single interface for operators, specialist support, and streamlined processes, we're making the region 'easy to do business with' for telecoms providers. This partnership approach is already delivering results: providers report improved coordination, and we're seeing new investment interest in areas that were previously difficult to serve. The coordinated model is demonstrating that regional approaches work - not just for today's connectivity gaps, but to future-proof our digital infrastructure and tackle the digital divide that affects over 100,000 residents across our region.

The Combined Authority's Child Poverty Action Plan demonstrates how connectivity and inclusion work together, embedding them as cross-cutting priorities in our plan to prevent families from falling into poverty, protect those in poverty, and lift families out of poverty. By targeting digital connectivity improvements in underserved areas, we're helping families stay connected to education, work and essential services across our region.

Our West of England Growth Strategy puts digital infrastructure at the heart of enabling growth across our region. Digital connectivity is explicitly identified as a growth constraint that we are addressing. The AI Supercluster exemplifies this: a £10-15bn investment opportunity requires "physical and digital infrastructure" to industrialise AI at scale.

Combined and local authorities have a critical role to play in enabling regional innovation across emerging technologies and are uniquely positioned to ensure digital infrastructure is baked into growth, not bolted on afterwards.

The FarrPoint Connectivity Report provides a useful benchmarking framework that brings together perspectives from a range of local bodies across the UK. I hope you find it both interesting and inspiring to see what your colleagues are championing in connectivity.

Introduction

Dr Andrew Muir
CEO
FARRPOINT

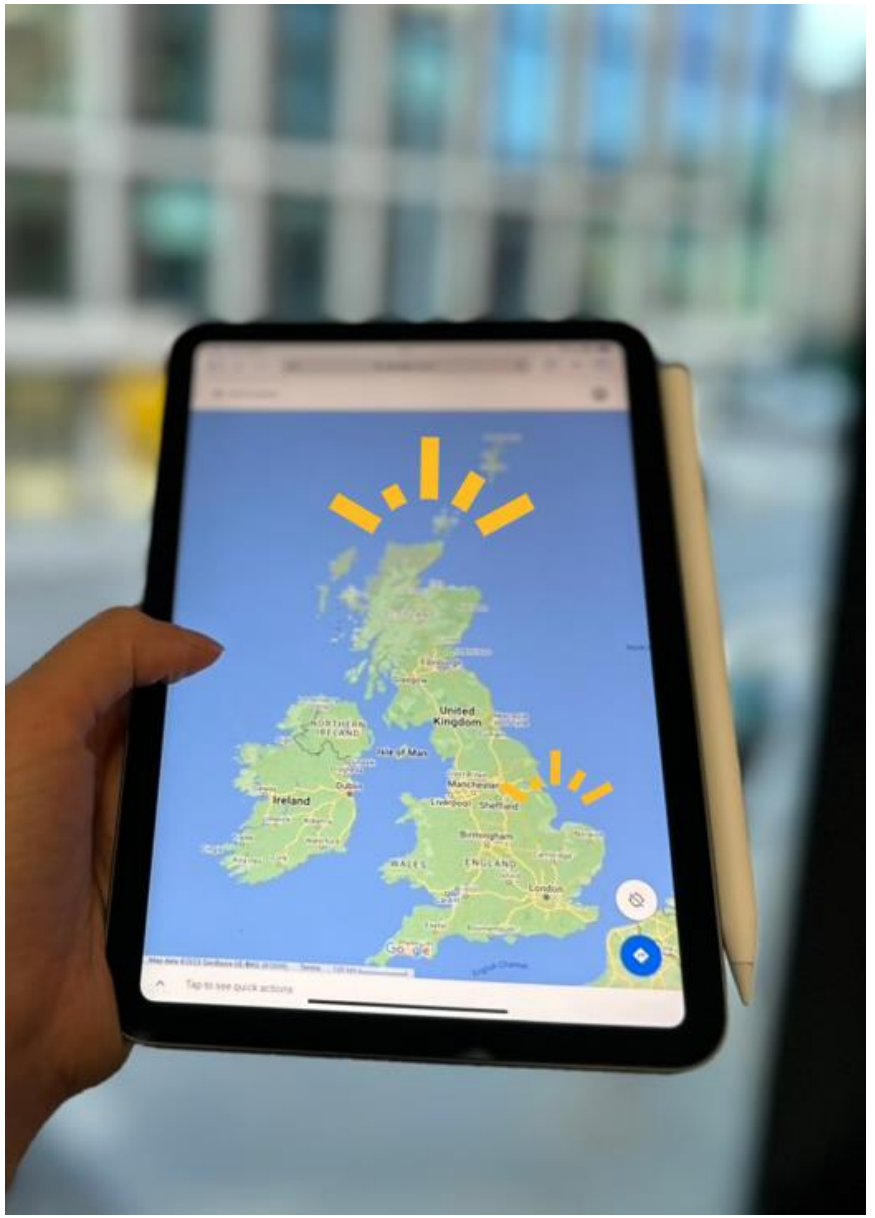
Welcome to our fourth Connectivity Survey, which investigates the evolving landscape of digital connectivity within UK local authorities. This year's survey builds on insights from our previous surveys, whilst adapting to reflect the changing landscape, including the rise of AI and data centre demand.

Data was gathered through an online survey and a range of interviews during December 2025 and was further supplemented by follow-up interviews with digital leads. We were delighted to receive responses from local authorities across the UK, demonstrating continued awareness of the importance of digital connectivity.

We would like to thank all participants who took the time to respond to the survey and to Freyja Lockwood from the West of England Mayoral Combined Authority for her opening comments. The following report presents key findings and includes quotes and supplementary information on a range of topics drawn from our research.

We hope this independent report continues to provide a unique perspective on the priorities and challenges facing digital leaders.

We welcome any feedback on this year's findings or other areas you would find valuable for future reports. Please reach out directly to **andrew.muir@farrpoint.com** with your thoughts.



Strategic Position

Strategic Position

The first set of questions covers the overall strategic position of connectivity within councils, including priorities, resources, and perceived barriers.

The overwhelming majority of respondents (80%) reported that digital connectivity remains a top priority within their region, with only 5% reporting that they felt connectivity was established enough that there was little left to do, although it should be noted that none of the respondents thought the rollout of digital infrastructure was fully complete.

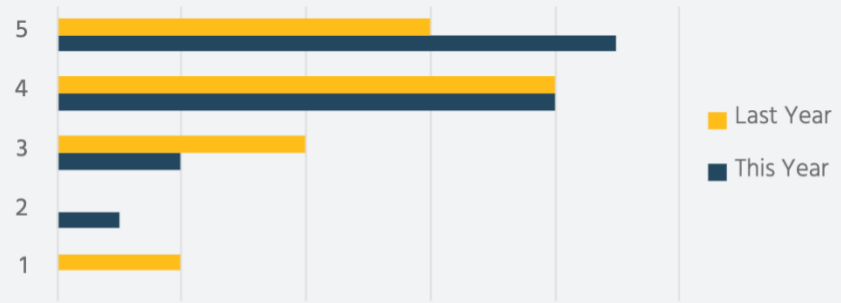
Notably, given how long local authorities, government, and industry have been working to improve connectivity, 15% reported a lack of understanding of the scale of the remaining issues, suggesting there may still be gaps in available information.

> With councillors more engaged and regularly updated, connectivity is seen as a strategic priority rather than a technical issue.

> We're treating connectivity more strategically internally, but capacity is still a huge constraint for us.

Q2. WE ASKED LOCAL AUTHORITIES HOW THEY RATE THEIR COUNCIL'S OVERALL VIEW OF CONNECTIVITY THIS YEAR VS LAST YEAR.

1 – little strategic interest, 5 – a leading topic



The results showed an upward shift in strategic interest in connectivity compared with last year. This reflects the continued and growing importance of connectivity, which underpins so much activity and has a significant social and economic impact across local authority operations.

> We've always valued connectivity, but this year it feels more central. Almost every directorate depends on it.

> Connectivity has shifted from being something of a supporting consideration to now being something we actively prioritise. It's now recognised as being essential for economic growth, resilience and public service delivery.

In terms of strategic priorities, local authorities continue to prioritise expanding gigabit broadband coverage (first choice 4 years in a row) and ensuring that a minimum level of superfast connectivity is available for all premises.

Mobile connectivity remains a priority, with 4G ranking higher than 5G. This likely reflects a desire to extend good mobile to everyone in the first instance. In comparison to last year, there is more focus on digital inclusion and greater adoption levels across the region ahead of further infrastructure measures.

Q3. WE ASKED LOCAL AUTHORITIES WHAT THEIR DIGITAL STRATEGIC PRIORITIES ARE FOR 2026.

1st	More areas covered by gigabit broadband
2nd	Ensuring 100% of premises in the area have at least superfast connectivity
3rd	More areas covered by 4G
4th	Ensuring better digital inclusion and adoption in the region
5th	More areas covered by 5G
6th	Ensuring better regional connectivity network resiliency
7th	Developing new smart (IoT) projects
8th	Attracting data centres to the area

Smart projects struggle to gain attention and may be viewed as niche rather than core to operations. Despite industry hype, attracting data centres does not appear to be a priority for local authorities. This will be explored further later in the report.

> Our top priority is making sure no home or business is left behind as we push towards full gigabit coverage...even the hardest to reach areas, around 3%, still need a solution.

> 4G coverage is still far from complete, especially in our rural counties, so making sure everyone gets a decent standard of mobile connectivity remains a core focus for us before we talk about anything more advanced.

> Connectivity on its own isn't enough. We know we must tackle affordability, skills and confidence. If we don't, people simply won't take up the services we're investing in and moving online.

Q4. WE ASKED LOCAL AUTHORITIES IF THEY HAVE A DIGITAL CHAMPION.

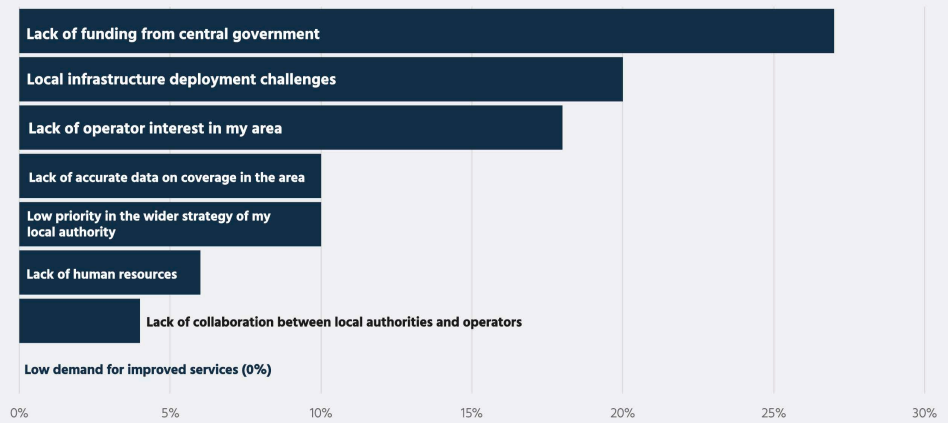
Over 85% of surveyed local authorities have a digital champion, reflecting ongoing and increasing recognition of the importance of digital connectivity. This is an increase from the previous year's response of 76%.

As with previous years, there remains some confusion about the definition and responsibilities of a digital champion. Whilst some local authorities interpret this as an individual leading on digital connectivity development and core project management functions of digital infrastructure improvements, others see this more as a technological evangelist or community engagement role.

Where digital champions are established, their importance and value have been reflected in conversations with key stakeholders. They are seen as vital in engaging the telecoms market, navigating barriers to connectivity development, supporting project rollout, advocating for the local authority, and engaging with wider local authorities and government administration.

> Our digital champions are key...helping us to engage providers, councillors and residents alike. They're critical in pushing along these projects.

Q5. WE ASKED LOCAL AUTHORITIES WHAT THE MAIN BARRIER WERE TO IMPROVING CONNECTIVITY IN YOUR AREA.



> The end of UK Gov schemes has left us a bit stuck. We know the areas that need support but without funding or vouchers we can't move anything forward.

> Funding is getting tighter every year but we're finding we are expected to deliver more. It makes it harder for us to maintain our core digital connectivity programme.

> Operators aren't that interested in the small, remote or difficult sites, of which we have many. There isn't any commercial incentive, so without public intervention nothing gets built.

Consistent with last year's findings, the primary barriers for local authorities are reported to be insufficient central government funding and difficulties deploying local infrastructure. The lack of central government funding not only affects staffing for connectivity projects but also the research, engagement, and delivery of planned and ongoing projects at the local authority level.

Local infrastructure deployment challenges were identified as a significant hindrance to connectivity improvements. These included issues around planning, wayleave approvals, local engagement and political and policy challenges.

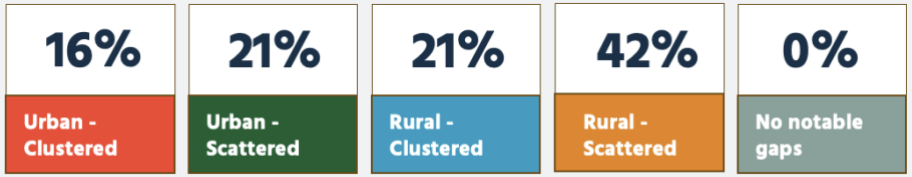
This year, a higher percentage of local authorities reported that a lack of operator interest in their area was another barrier to improving connectivity. This was reflected in conversations with local authorities, who noted the challenges of a changing telecoms supplier market and the difficulty of engaging with mobile network operators on improvement works.

Gigabit Rollout

Gigabit Rollout

This section looks at developments in fixed broadband across local authority areas.

Q6. WE ASKED LOCAL AUTHORITIES WHERE THEY HAVE REMAINING GAPS IN GIGABIT COVERAGE.



All local authorities reported gaps in Gigabit coverage in their regions. Most commonly, this was in rural scattered areas – typically isolated premises missed with the Gigabit rollout in remote or hard-to-reach areas. Another 21% of gaps were seen in rural clustered areas, often villages not yet reached by full-fibre rollout.

Whilst urban areas appear to face fewer issues, 21% of local authorities note challenges with scattered premises and 16% for clustered premises. This reinforces the view that work remains across geographies to improve the availability of Gigabit coverage; challenges persist in both rural and urban contexts.

> Our biggest Gigabit gaps tend to be in rural scattered areas. Because they are so spread out and hard to reach, they naturally are the most expensive.

> Urban clustered gaps are smaller in number, but they are still significant. Typically, these tend to be smaller estates or MDUs where permissions, wayleaves and building rules can slow everything down."

Q7. WE ASKED LOCAL AUTHORITIES IF THEY IMPLEMENTED ANY TECHNICAL, FINANCIAL, OR POLICY INTERVENTIONS TO SUPPORT AREA-WIDE GIGABIT COVERAGE.

Yes	No	Unsure
60%	30%	10%

Three-fifths (60%) of local authorities participating in the survey reported taking action to support the Gigabit rollout. This demonstrates a growing willingness to intervene where commercial delivery falls short. These actions include coordinating street works, improving planning processes and directly engaging operators to unblock deployment issues through barrier-busting activities.

By contrast, 30% of local authorities reported taking no specific action, often due to limited capacity or uncertainty about their role, while 10% were unsure, potentially reflecting ongoing ambiguity about who is responsible for broadband delivery in local authorities or the lack of a statutory requirement.

> We've had to get more involved in the rollout. We've been coordinating with operators, helping with the planning process and dealing with community concerns. Without us intervening the gaps just wouldn't get closed.

> Local authorities and providers need better two-way communication... improved coordination supports deployment.

> Operator disinterest and market contraction is making it difficult to attract suppliers for small or remote projects.

Q8. WE ASKED LOCAL AUTHORITIES IF THEY HAD IMPLEMENTED ANY TECHNICAL, FINANCIAL, OR POLICY INTERVENTIONS TO SUPPORT AREA-WIDE GIGABIT COVERAGE. COMMENTS WERE:

"Created a dedicated digital connectivity role, which **enabled stronger policy development and effective collaboration with key stakeholders**, leading to improved regional connectivity."

"**Area-wide Gigabit coverage is unlikely**. Progress has focused on working with Openreach (Project Gig), Welsh Government programmes, and developing an FTTP/LEO project."

"A dig-once policy and **a dedicated telecoms planning officer have been most successful**. The RGBVS top-up was less effective due to suspension under Project Gigabit."

"Sponsored an LFFN funding bid, resulting in a **fibre build across the city-region** deal area."

"The Better Broadband Infill Project is in delivery and **could address up to 65% of remaining gaps**, subject to full commercial and Project Gigabit rollout."

"A strategy-led resourcing approach **improved data capability, BDUK engagement on Project Gigabit, and supplier engagement**, and has been successful."

When asked which interventions were most successful in supporting area-wide Gigabit coverage, local authorities noted that organisational and strategic approaches, rather than purely financial ones, had the greatest impact.

Many of the local authorities we spoke with noted that creating dedicated digital connectivity teams or specific roles was among the most impactful interventions. Many of these roles have helped the local authority strengthen policy, improve departmental coordination, and enhance engagement with telecoms operators, the UK Government, and wider stakeholders. Examples of these roles and teams included a dedicated telecoms unit, telecoms planning officers and digital infrastructure teams. These individuals can support barrier-busting, supplier engagement, and long-term planning, all of which further enable the wider Gigabit infrastructure rollout, without directly funding infrastructure.

Another successful intervention theme was leveraging related strategic programmes and policies to improve rollout effectiveness and efficiency. Examples of these were dig-once polices, anchor-tenancy style funded fibre builds, targeted rural grants for Fixed Wireless Access and satellite and region-wide strategies such as Connecting Cumbria's Digital Infrastructure Strategy or GMCA's 'Delivering World Class Connectivity' Guidance.

Local authorities also noted that strong collaboration with national bodies (e.g. BDUK, Devolved Governments), coordinated regional pilots focused on addressing not-spots and data sharing initiatives around Gigabit gaps were all helpful, potentially more so than financial schemes such as Project Gigabit's voucher top-ups.

> Putting dedicated resource in place has been one of the most impactful things that we've done. It has helped to strengthen our policy work and massively improved how we collaborate with operators.

Mobile Connectivity

Mobile Connectivity

This section turns to mobile connectivity, which is seeing increasing interest at both the national and local levels.

Q9. WE ASKED LOCAL AUTHORITIES WHAT THE MAIN MOBILE CONNECTIVTY ISSUES WERE IN THEIR AREA.

33% Lack of coverage	20% Slow speeds	18% Poor outdoor connection	15% Poor indoor connection
14% Network resilience	0% Lack of competition	0% Affordability	0% We have no major issues in our area

Local authorities reported that mobile connectivity remains problematic, with a lack of coverage the most significant issue. This was noted by one-third of respondents, who reported that both urban and rural communities continue to face not-spot issues or unreliable services – often in areas that appear to show coverage from operators.

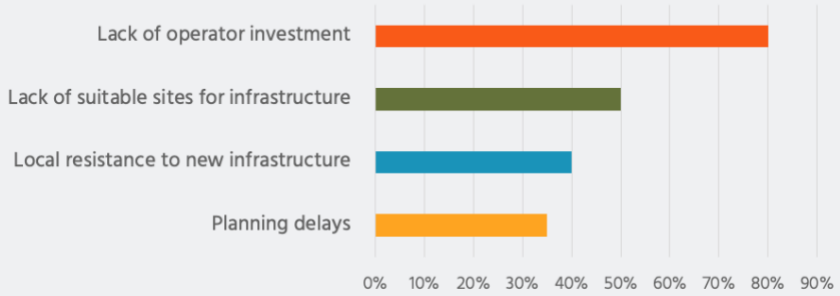
Slow speeds and poor outdoor connectivity were also concerns, although perhaps surprisingly, poor indoor connectivity was ranked as a lower issue.

Network resilience is a growing concern, with local authorities flagging outages and failures from storms as a significant risk to public safety and service delivery.

> On paper we've got coverage, but people still can't get a signal good enough for what they need to do. Ofcom maps just don't match the lived experience of our residents.

> Whenever there is a storm, whole communities can lose signal. Since the 2G and 3G switch off, we believe the strain on 4G has only got worse.

Q10. WE ASKED LOCAL AUTHORITIES WHAT THEY THINK THE BIGGEST CHALLENGES ARE TO IMPROVING MOBILE SERVICE IN THEIR AREA.



There was a strong consensus that the biggest barrier to improving mobile service is a lack of operator investment to target not-spot areas. There is perhaps an element of frustration that, despite some local authorities commissioning mobile coverage tests, this does not lead to operators' investment.

A recent Mobile Landscape report by FarrPoint examines the commercial and technical nuances of mobile deployment. Our research suggests that a lack of investment is only part of the story.

A lack of suitable sites for new infrastructure was also highlighted, with difficulties accessing public sites, environmental protection constraints, and the complexity of securing sites that support masts and small cells.

Local resistance also remains a challenge, with many communities often opposing new infrastructure deployments based on aesthetic or health concerns. Planning delays were also highlighted, with local authorities noting that telecoms applications can take a long time due to their overlap with other departments, including highways, estates, heritage and housing, all of which compound an already stretched local authority planning service.

> Operators simply aren't interested in small, remote or difficult sites. Without commercial incentive, I can't see these gaps getting filled.

> We could do more on mobile if we had the internal planning capacity. But stretched teams, complex permitting and no statutory duty means that progress is slow.

CASE STUDY: Swansea Bay City Deal works with FarrPoint to evaluate the impact of investing in fibre and mobile infrastructure in the region

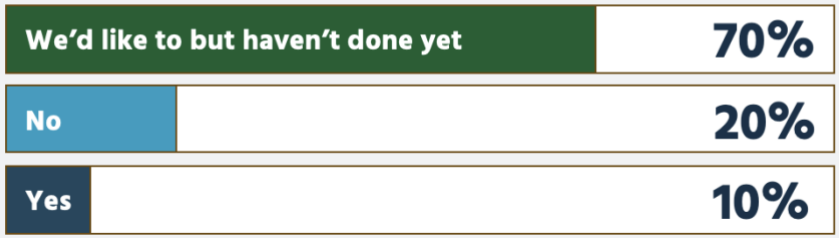
READ MORE

Impact of Improved Connectivity

Impact of Improved Connectivity

Moving away from the underlying infrastructure, we asked a series of questions about the impact and take-up of services.

Q11. WE ASKED LOCAL AUTHORITIES IF THEY HAVE MEASURED THE ECONOMIC OR SOCIAL IMPACT DUE TO IMPROVED CONNECTIVITY IN THEIR AREA.



Whilst many local authorities recognise the importance of demonstrating the value of improved connectivity, most (90%) have not yet undertaken any formal assessment of this.

Only 10% of respondents stated they had conducted any form of economic or social impact assessment. 20% indicated they hadn't done so, but a significant proportion (70%) indicated they would like to measure impact but have not yet done so.

These results suggest a growing need for tools and data to conduct meaningful evaluations of connectivity infrastructure investments.

During our interviews with local authorities, they emphasised that whilst connectivity is believed to bring a range of benefits, the lack of analytical resources or frameworks to quantify these is a major barrier. For some local authorities, internal teams are already stretched, and dedicating time to calculate this impact is difficult, even though it is considered valuable.

Q12. WE ASKED LOCAL AUTHORITIES ABOUT INSIGHTS FROM MEASURING THE ECONOMIC OR SOCIAL IMPACT OF IMPROVED CONNECTIVITY IN THEIR AREA. COMMENTS WERE:

"While a full economic appraisal is still to be completed, annual impact assessments and local case studies show that improved connectivity is a game-changer, helping to level up opportunities in a digital world."

"A 2023/24 strategic outline business case supported the launch of the Digital Office, focusing on closing gaps in superfast coverage. Impact assessments are ongoing to demonstrate its contribution to regional growth ambitions."

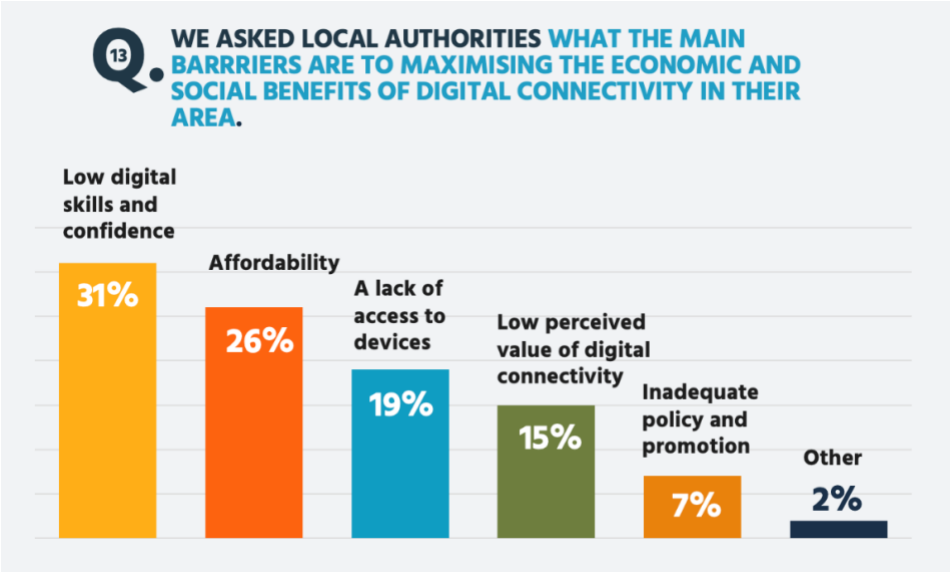
"We see the real-world benefits every day but translating that into numbers for senior leaders is still a change."

"We lack a robust model to attribute economic growth directly to digital connectivity. We're exploring options to see what the market can deliver in terms of tools to showcase improvements and encourage market driven solutions."

CASE STUDY: South London Connectivity Gap Impact Assessment.

SLP commissions FarrPoint to assess and quantify the economic impact of poor connectivity to provide evidence for future interventions and market engagement.

READ HERE



For nearly one-third of local authorities (31%), low digital skills and confidence were their biggest barriers to maximising the economic and social benefits of digital connectivity. This was followed by affordability (26%) and a lack of access to devices (19%). These findings reflect a common reality in which people face a range of digital inclusion challenges related to skills, access, confidence, and motivation.

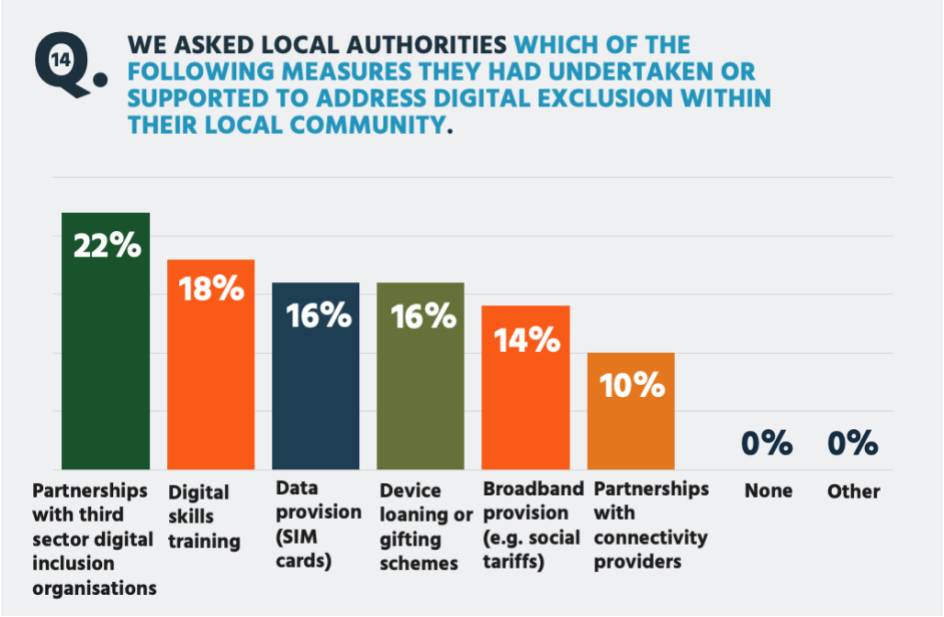
The findings were reinforced by interviews with local authorities, who repeatedly cited skills, confidence, and affordability as key barriers to maximising the social benefit of digital connectivity. In addition, partner-led device and data schemes and improved storytelling were among the most effective responses to address these issues.

> We simply couldn't do this work without our community partners. They are the ones who reach people who we would never be able to reach through normal local authority channels.

> It isn't enough just to roll out full fibre. People need access to devices, data and the confidence to use digital services, otherwise the benefits just don't land.

Digital Inclusion and Adoption

Digital Inclusion and Adoption



All local authorities indicated they were undertaking at least one of the activity options provided to address digital exclusion in their local communities. The most common activity was partnerships with third-sector digital inclusion organisations, cited by one-fifth (22%) of local authorities. This reflects a generally strong reliance on charities, community groups, and trusted organisations that can reach residents who are often hardest to engage.

Digital skills training and data provision via SIM cards were also core pillars of local digital inclusion strategies, helping residents overcome affordability and confidence barriers to getting online. Similarly, device lending and gifting schemes have been shown to play an important role for local authorities, particularly for low-income households and older residents who may lack access to necessary devices. Broadband support through schemes such as social tariffs (14%) is less common, reflecting both limited awareness among residents and a lack of mechanisms for local authorities to directly influence take-up.

> Affordability, digital skills, and confidence are key exclusion barriers. We are doing ongoing monitoring to assess their impact on take up of new connectivity solutions, particularly for people moving from sub superfast to fibre.

> Our team have been distributing devices and connectivity through our partners, reaching hard-to-engage residents and providing skills training.

CASE STUDY: Digital Inclusion Plan and Policy Review for London Borough of Tower Hamlets

FarrPoint provided a review of the council's inclusion policies, including a socio-demographic mapping exercise and stakeholder interviews.

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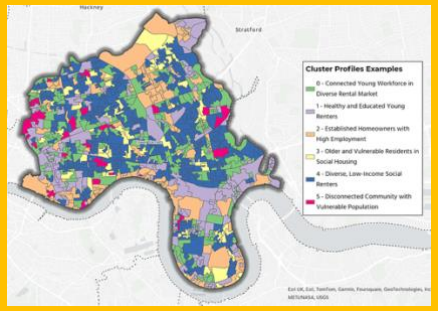

Connectivity Resilience

Connectivity Resilience

Q15. WE ASKED LOCAL AUTHORITIES IF THEY INVESTIGATED THE RESILIENCE OF CONNECTIVITY IN THEIR AREA, AND IF SO, WHAT HAD BEEN DONE.

Have internal resource responsible for this issue: 20%

Taken measures to understand current levels of resilience: 18%

Undertaken communication and awareness rising: 16%

Explored the use of alternative backup technologies: 14%

Engaged with operators to help plan for disruption: 14%

Have not done anything yet but plan to: 9%

Have no plans to look at resilience: 9%

The results from this year's survey showed local authorities are taking proactive steps to better understand and strengthen network resilience. With growing awareness about power outages, major incidents and the vulnerability of increasingly digitised public services.

Most local authorities noted they had some internal capability in place that is responsible for resilience. This suggests resilience is becoming increasingly recognised as a core operational function rather than an ad-hoc activity. Lots of local authorities have already undertaken activities such as communication and awareness raising relating to resilience.

As with last year, various authorities noted their response to the survey reflected internal organisational networks rather than wider telecoms infrastructure. This underscores the continued uncertainty about where responsibility for wider digital resilience truly sits within a local authority.

> Resilience has become a top priority for us. Lots of the communities we support are much more aware of outages now and the impact they can have. We need to make sure essential services keep running.

> We understand our local risks better than anyone. Without a clear responsibility or funding however, improving resilience is still much harder than it should be.

How can we better understand the level of connectivity resilience?

At FarrPoint, we often start with a Connectivity Resilience Review. It uses a methodical 'bottom up' approach to identify network vulnerabilities and a 'top down' approach that identifies critical organisations, applications and users that rely on connectivity. This can then be developed into a set of recommendations.

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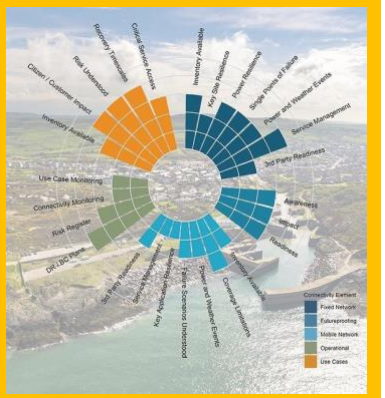


Digital Twins

Digital Twins

We asked a number of questions about new areas of interest that attract significant publicity, such as Digital Twins/Digital Shadows. We were interested in capturing the local authorities' views on how they regard these in practice.

Most respondents hadn't explored digital twins or digital shadows yet, whilst a smaller group noted they are already creating one (20%) or alternatively that they see the need to, but have no funding secured (20%). Only a few respondents noted they don't know enough to decide if it would bring any benefits (15%).

Across interviews with local authorities, respondents viewed digital twins as a promising yet emerging tool. Only a few reported actively developing them. Most local authorities we spoke to recognise their potential to improve planning, connectivity mapping, resilience, and decision-making, but also noted that full use of these was constrained by funding, staffing, expertise, and higher-priority areas of work.

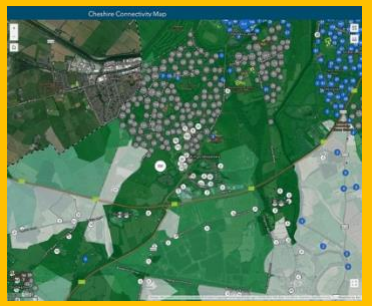
One local authority reported that it is expanding an academic-led digital twin across its region, while another is investing in advanced pilots to map real-time connectivity to inform targeted interventions.

Overall, digital twins are seen as a valuable tool for long-term transformation, but most local authorities are still at the early stages of awareness and exploration rather than implementation, with not a single council reporting they already have a digital twin.

CASE STUDY: Multi-level mobile and broadband connectivity portal for Cheshire

The portal displays service availability and changes over time, supporting long-term planning by tracking the progress of ongoing projects, improving the councils' knowledge of connectivity helping inform future decisions.

READ HERE



Data Centres

Data Centres

Q17. WE ASKED LOCAL AUTHORITIES ABOUT THEIR INVOLVEMENT WITH DATA CENTRES IN THE REGION.

35% We are actively encouraging data centres to come to our region	**25%** We are actively working with data centre developers with plans to build in our region	**15%** We have investigated with potential benefits data centres to our region
15% We are not engaged with this sector as a council as we don't have capacity internally	**10%** We are not engaged with this sector as we do not believe we are suitable as a region	**0%** We are not engaged with this sector as we do not want data centres in our region (0%)

Local authorities appear to be becoming more outward-facing and proactive within the data centre space. There has been a noticeable shift in passive interest to one of active engagement over the past year.

Over one-third (35%) of local authorities noted they are actively encouraging data centres to locate in their region. This reflects a growing understanding about the potential economic and innovation impacts data centres can have for local areas.

An additional quarter (25%) of local authorities also noted it was something they were actively working directly with developers on concrete proposals on. This shows that early-stage opportunity pipelines are growing, and local authorities can see the benefits of these.

15% of local authorities indicated they have undertaken formal investigations into the potential benefits of data centres to their region, with the same number noting they are not engaged with the data centre space due to their own capacity constraints.

> We're interested in the opportunities that data centres could bring, but many regions like ours aren't set up for large-scale data centres. The energy and water constraints make the proposition difficult internally and politically.

> For us, data centres are an economic play. It's mainly about attracting investment and positioning the region for future digital growth, as opposed to solving a local connectivity problem.

CASE STUDY: Data Centre Opportunities Review for Buckinghamshire Council. READ HERE

"Buckinghamshire Council were very keen to explore the economic opportunities that data centres may present. FarrPoint provided us with a very clear and comprehensive report, along with recommendations for how we can capitalise on these opportunities. This report has aided us with decision making in this area and is being utilised as evidence to support the council's strategic approach to data centre delivery in Buckinghamshire."

Lloyd Little, Digital Infrastructure and Innovation Lead at Buckinghamshire Council

Artificial Intelligence (AI)

AI

Q18. WE ASKED LOCAL AUTHORITIES IF THEY SEE A ROLE FOR AI IN SUPPORTING THE PROVISION OR TAKE-UP OF CONNECTIVITY IN THEIR REGION.

Yes 75%

No 25%

For most local authorities (75%), artificial intelligence (AI) was seen as playing a role in boosting both the provision of connectivity in their region and in its take-up.

No local authorities indicated they were using AI to design better interventions, suggesting that tools to help calculate ROI or prioritise schemes are either not available or can be calculated without AI. This was evident in interviews with various local authorities, who noted that their hope for AI was that it could help them prioritise investment and action and provide standardised models for evaluating social and economic impact.

> We chose not to chase an 'AI growth zone' badge. For us, our priority is on helping local businesses and other services adopt AI tools that already exists.

> We're using basic AI at the local authority and we're exploring more advanced applications for service delivery. It's all still very early days and the disruptive use cases are yet to be fully realised.

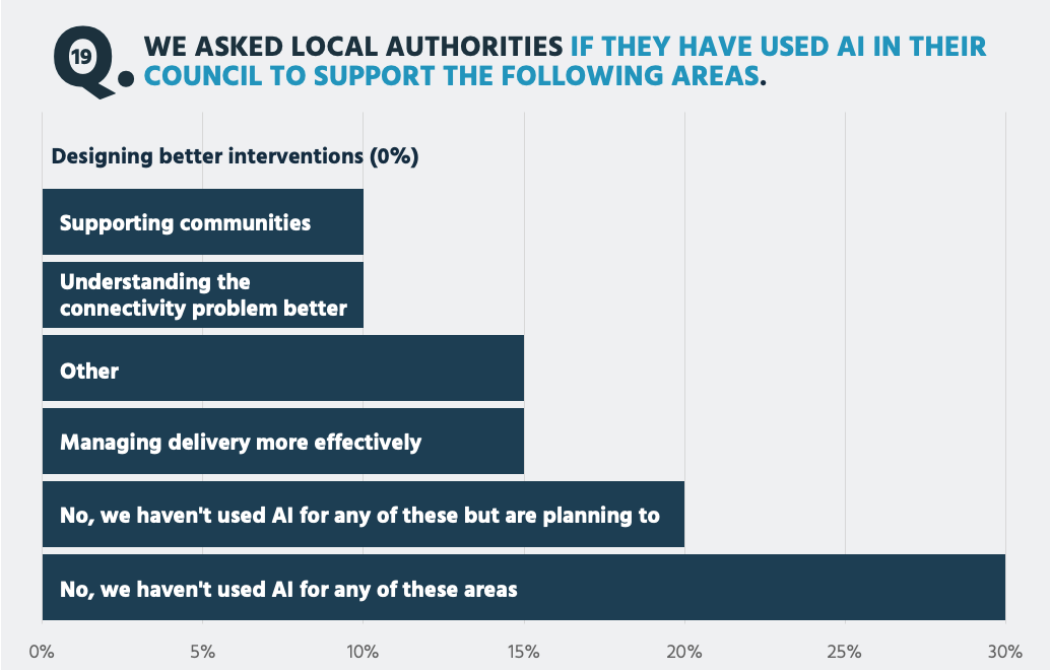
Survey responses indicated that 50% of local authorities have not yet used AI in any of the listed areas, but 20% of those plan to us it (graph of the next page).

The most common uses for AI were managing delivery more efficiently (e.g. network monitoring) and other bespoke applications, with a smaller new of responses for both understanding the connectivity problem better or supporting communities.

The view of many local authorities was that whilst AI could be used to optimise network operations (e.g., fault detection, automated network management), as several mentioned they were utilising it for, it was not its core function. Instead, AI would be invaluable to them as a tool for creating data-driven programmes and managing the connectivity rollout in the region.

> We're using AI to monitor network performance and tune it proactively. This helps us reduce network incidents and reflects a shift from information to action.

In addition, the growing public use of AI was seen as shifting attention back to the underlying connectivity infrastructure, which could further support its development. A minority of respondents remained cautious about AI, noting that it is still in its early stages and that disruptive, proven use cases in connectivity rollout and adoption remain limited.



None of the respondents (0%) said that they used AI for designing better interventions.

NEW FRAMEWORK TO HELP LOCAL BODIES UNDERSTAND THE LOCAL IMPACT OF AI

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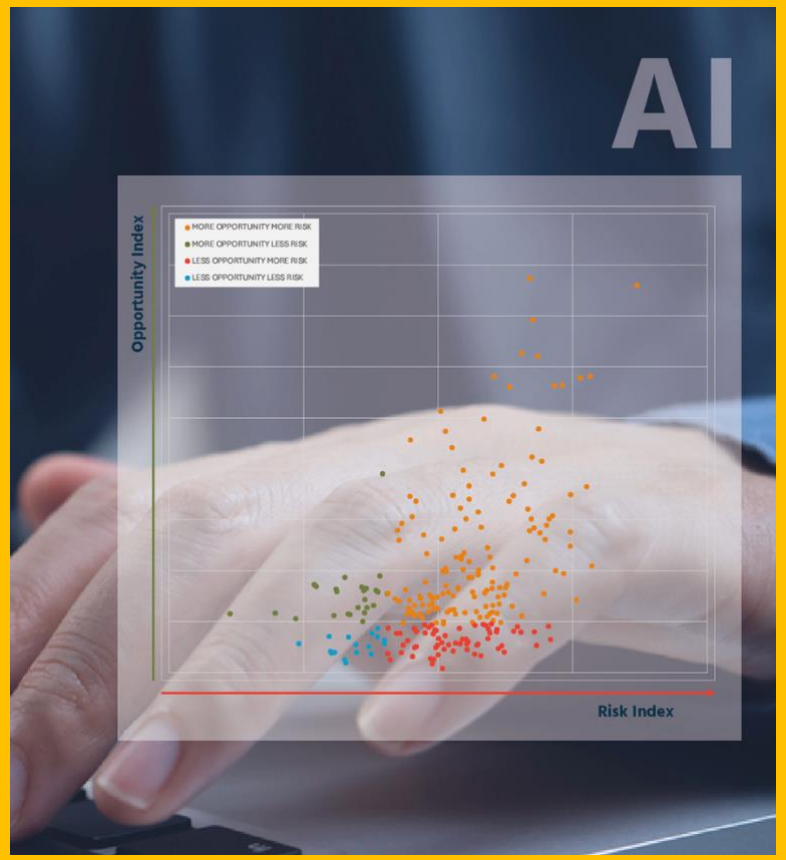

Additional Feedback for Operators and Central Government

Q20. WE ASKED LOCAL AUTHORITIES FOR THEIR TOP REQUEST TO THE CENTRAL GOVERNMENT IN TERMS OF CONNECTIVITY. COMMENTS WERE:

"Develop targeted **intervention policies for the hardest-to-reach rural premises**, particularly where Project Gigabit and commercial rollout will not deliver."

"Strengthen oversight of mobile connectivity by **holding MNOs to account for real-world coverage and performance**, particularly in rural areas."

"**Invest in resilient backhaul infrastructure**, including redundant subsea, microwave, or satellite routes, to ensure service continuity in vulnerable areas."

"Ensure **rural areas receive parity of investment in FTTP and mobile coverage**, rather than widening the gap through urban-focused upgrades."

"Provide more **flexible, locally targeted funding to support area-specific connectivity solutions**, especially for mobile coverage and economic sites."

"Engage more closely with local authorities, **acknowledge limitations in Ofcom coverage data**, and set out a clear plan for premises that Project Gigabit will not reach."

The most consistent message was the need for greater government intervention where markets will not deliver. Local authorities noted that whilst projects such as Project Gigabit and commercial builds continue to progress, a significant number of rural and Very Hard to Reach premises remain unconnected.

A second theme was the need for greater central government focus and intervention on mobile connectivity. Local authorities felt that the focus on gigabit fibre, a lack of investment in the Shared Rural Network, poor Ofcom data, and the absence of a clear view of mobile market failure had left rural communities without a viable route for intervention to tackle mobile connectivity challenges.

There was also an emphasis on the need to both continue and increase funding to support local authorities with local delivery capacity, primarily by funding roles such as digital champions, digital placements, and local digital connectivity teams.

Local authorities felt that improving mobile connectivity is not achieved solely by the central government funding infrastructure, but also by supporting local capacity to coordinate operators, manage data, engage stakeholders, break down barriers, and unlock sites.

Local authorities want the central government to listen more closely to local realities and feedback, provide targeted support where commercial rollout will stall, and continue to treat digital connectivity as a crucial national infrastructure.

> Tell us how you plan to reach the final 1%. Without a clear picture, we simply can't plan locally.

> There are still rural premises that no current programme will ever reach. We need to have proper coordinated policy and interventions to reach these places.

> Digital connectivity should be recognised as critical national infrastructure that it is, with funding and policy focus to match this.

Q21. WE ASKED LOCAL AUTHORITIES FOR THEIR TOP REQUEST TO THE TELECOMS INDUSTRY IN TERMS OF CONNECTIVITY. COMMENTS WERE:

"Engage early and openly with local authorities. **Councils are enablers, not barriers**, and can actively support delivery if involved from the outset."

"**Prioritise reliable 4G coverage in rural areas** and align investment with local and regional needs, rather than focusing primarily on 5G SA."

"Improve network resilience through **greater redundancy, stronger SLAs, and coordinated outage planning**, particularly for rural and island communities."

"Provide **transparent, real-world coverage data** to reflect actual performance, not just reported operator data."

Across nearly all responses to this question, local authorities' messaging was consistent: they want earlier, more open, and more serious engagement.

Many local authorities repeatedly noted that they are not the barrier to deployment they are often made out to be. Instead, many noted that they can and already are helping to accelerate delivery by unblocking issues related to planning, street works, and resolving community concerns.

They want to see more proactive, clearer two-way communication from the industry, greater transparency about build plans, and a willingness to work with local authorities as partners, rather than as obstacles they must navigate.

A second theme was that of the need for better data. Local authorities want the industry to publish real-world coverage data, identify and acknowledge gaps, and stop using overly optimistic coverage maps that don't match on-the-ground reality.

This improved data could help local authorities work with operators to target not-spots in both rural and urban areas.

There was also a consistent request from local authorities for greater action on rural connectivity and resilience. Local authorities want operators to prioritise 4G improvement in these areas, before pushing for advanced 5G standalone.

They would like to see infill of remaining coverage gaps, improved backhaul resilience, and a stronger industry response to rural power vulnerabilities. Without proper operator investment in resilience, local authorities believe outages will continue to have severe impacts on many rural communities.

> Just speak to us early and openly. We (Local authorities) aren't a hindrance and can unblock barriers and support delivery - but only if operators engage with us from the start.

> Rural areas still struggle to get even reliable 4G. Rather than looking at pushing 5G Standalone in places that don't need it yet, focus on filling these critical gaps in 4G.

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