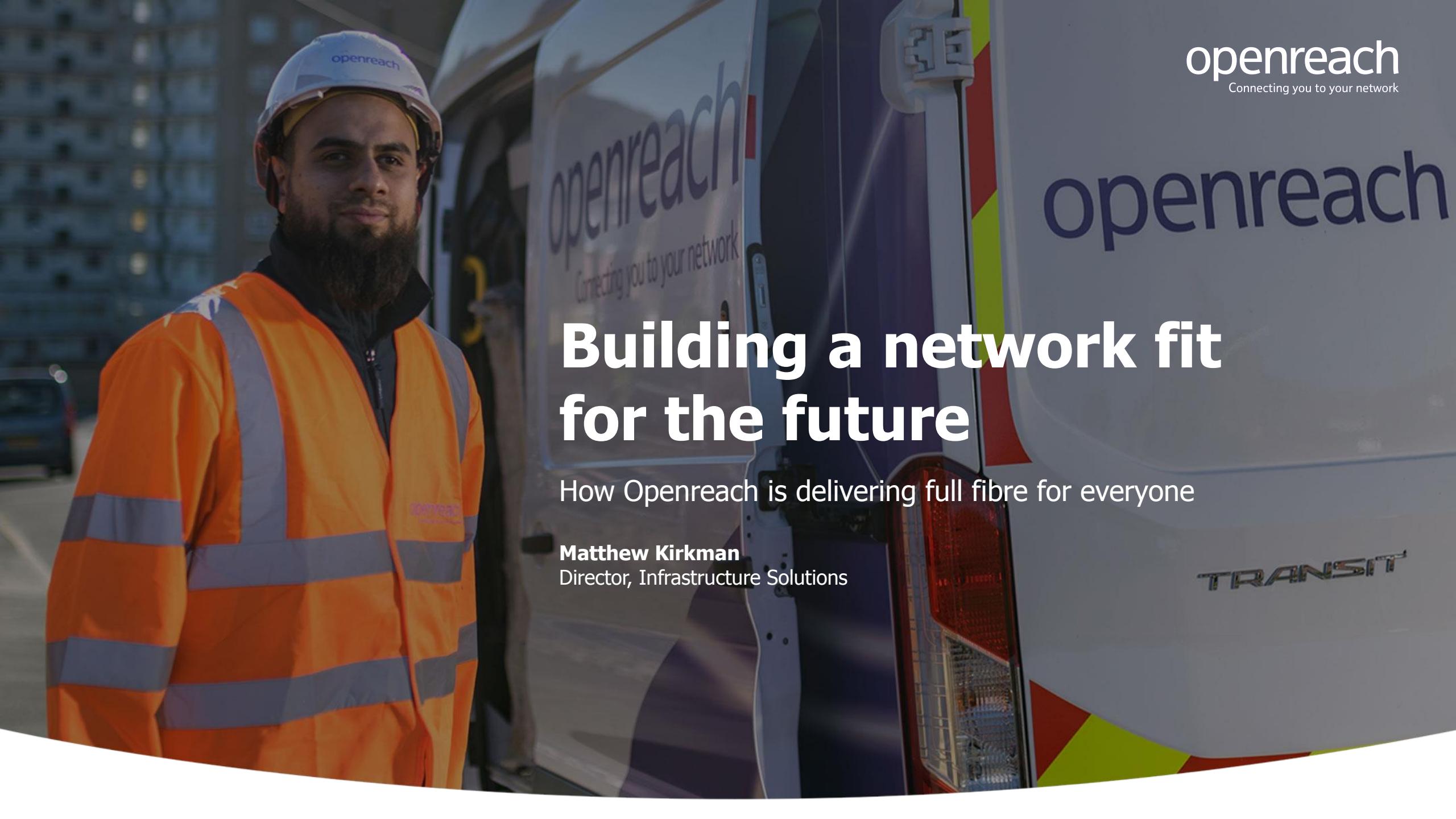


Building a network fit for the future

How Openreach is delivering full fibre for everyone

Matthew Kirkman
Director, Infrastructure Solutions





The future of UK connectivity

Demand for data is growing year on year, which is why we're building a network fit for the future



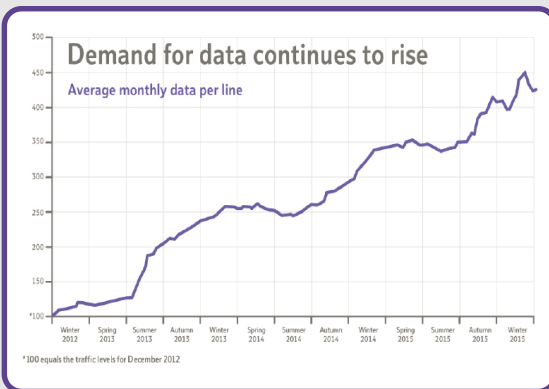
240Gbps data used every month by the average fixed broadband connection



58% of people use online video subscription services



Landline usage halved in the last five years



Supporting the government's full fibre plans



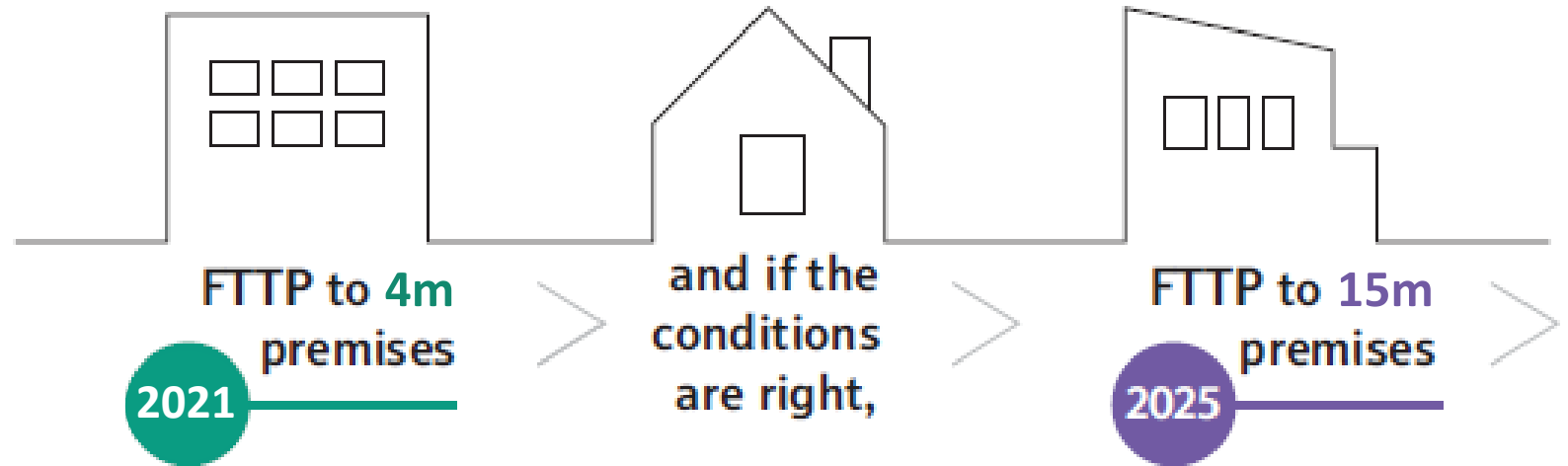
- Full fibre to all UK homes by 2033
- Guaranteeing full fibre to all new build developments
- Preparing for the copper switch off
- Physical infrastructure needed to support 5G rollout

“We want everyone in the UK to benefit from world-class connectivity no matter where they live, work or travel”

Jeremy Wright
DCMS Secretary (2018-19)

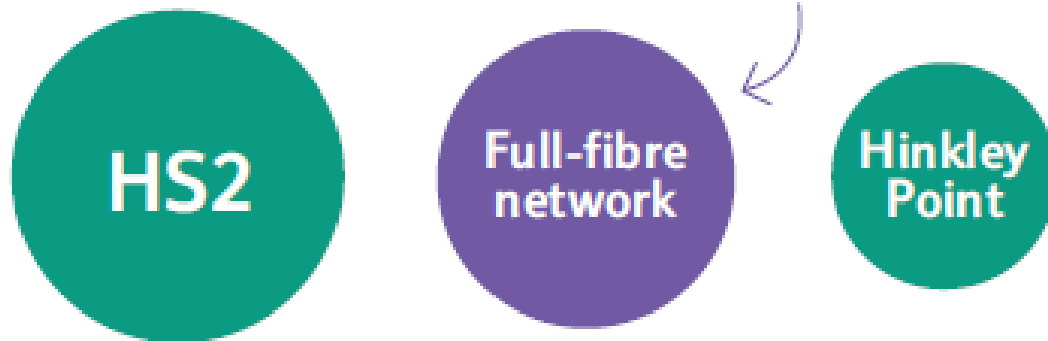
openreach

has big ambitions



We're already building at quality, speed, scale and a competitive cost

The full-fibre network build is the second biggest infrastructure build in the UK



We're building
3x
quicker
this year than last
20K homes
per week

This year we're
building FTTP to
1.2m homes
and doubling our
FTTP footprint to
2.5m homes

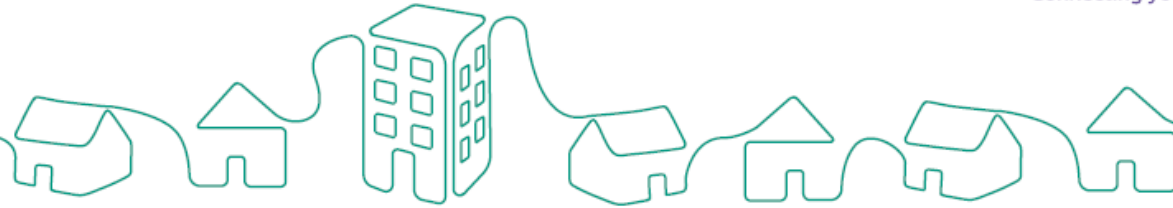
Demand for our
fibre broadband
products is up by
22%
year on year

August 2019

openreach

Connecting you to your network

New Sites



More than **1.19 million**

plots have been contracted with us for fibre broadband since February 2016.

Nearly **1 million**

of those plots will receive an ultrafast connection, known as FTTP – that's 'fibre to the premises'.

345,000

plots have been contracted within this financial year and of these,

91%

will receive FTTP. That's more than triple the FTTP

footprint that was contracted for new builds in the previous year.



We work with

19,000
developers

across Britain to bring the fastest fibre broadband we can, to new build homes.



392,000

plots have been 'self-installed' with FTTP by developers, connecting to the Openreach network. This saves time and money, and to date,

41%

of all plots are self-installed.



4%

The amount a property can change in value depending on the quality of broadband.

88%

of people in an online poll* listed slow or poor broadband as a factor when choosing a property.

*tepilo.com



We'll build a full fibre network to each property in all new residential, or mixed residential/commercial, sites with

30 premises

or more, **free** of charge.

For developments with

2-29 properties

we'll offer to build FTTP with a small contribution from developers.

We're physically connecting **3,230+** new homes



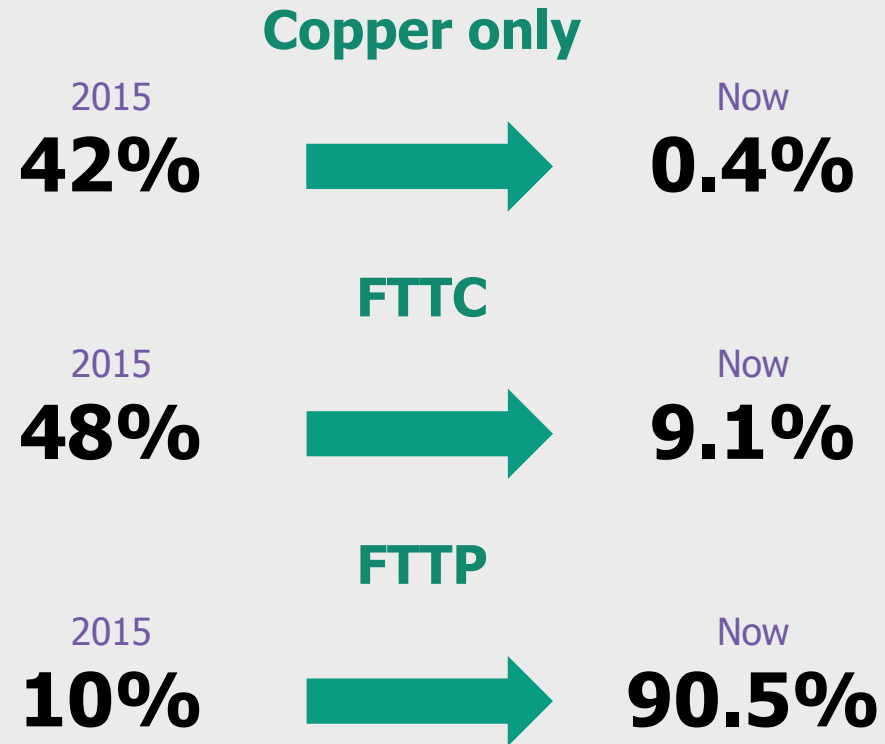
every week to full fibre infrastructure

openreach.co.uk/propertydevelopments

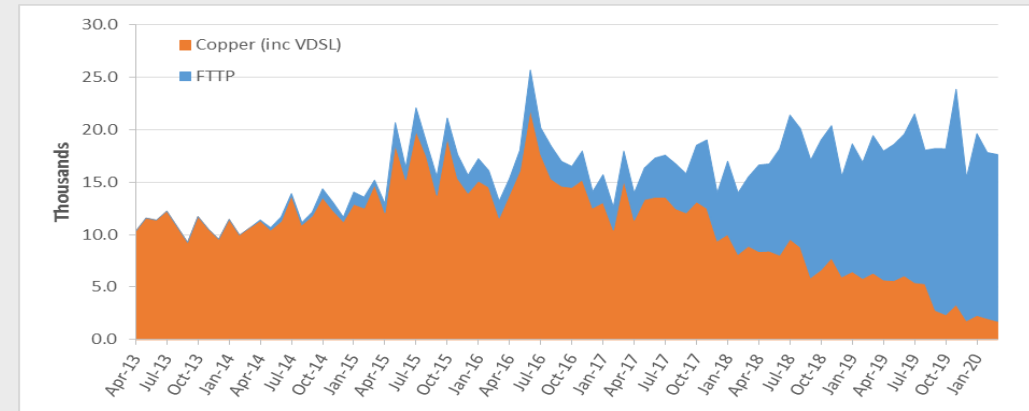
The New Sites technology change

The internet touches virtually every aspect of our lives, its empowering influence is growing which in turn, is driving our technology

Contracted technology mix (plots) 2015 – now (all sites)



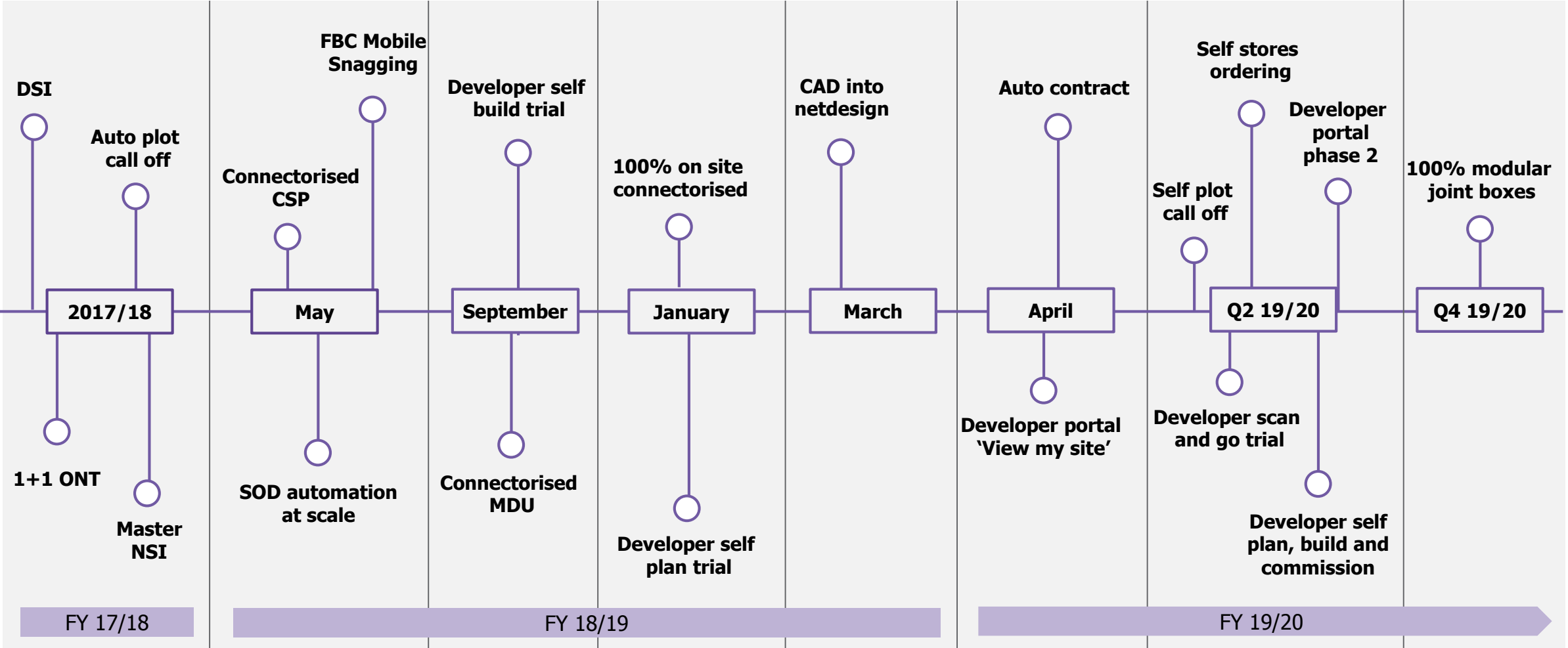
Built technology mix, 2016 – now (all sites)



Year	Copper	FTTP	Total	FTTP %
2013-14	129,437	0	129,437	0%
2014-15	146,704	6,281	152,985	4%
2015-16	186,700	20,669	207,369	10%
2016-17	180,391	29,257	209,648	14%
2017-18	138,445	57,371	195,816	29%
2018-19	88,107	132,026	220,133	60%
2019-20	51,000	190,000	241,000	79%
2020-21	11,708	220,033	231,741	95%

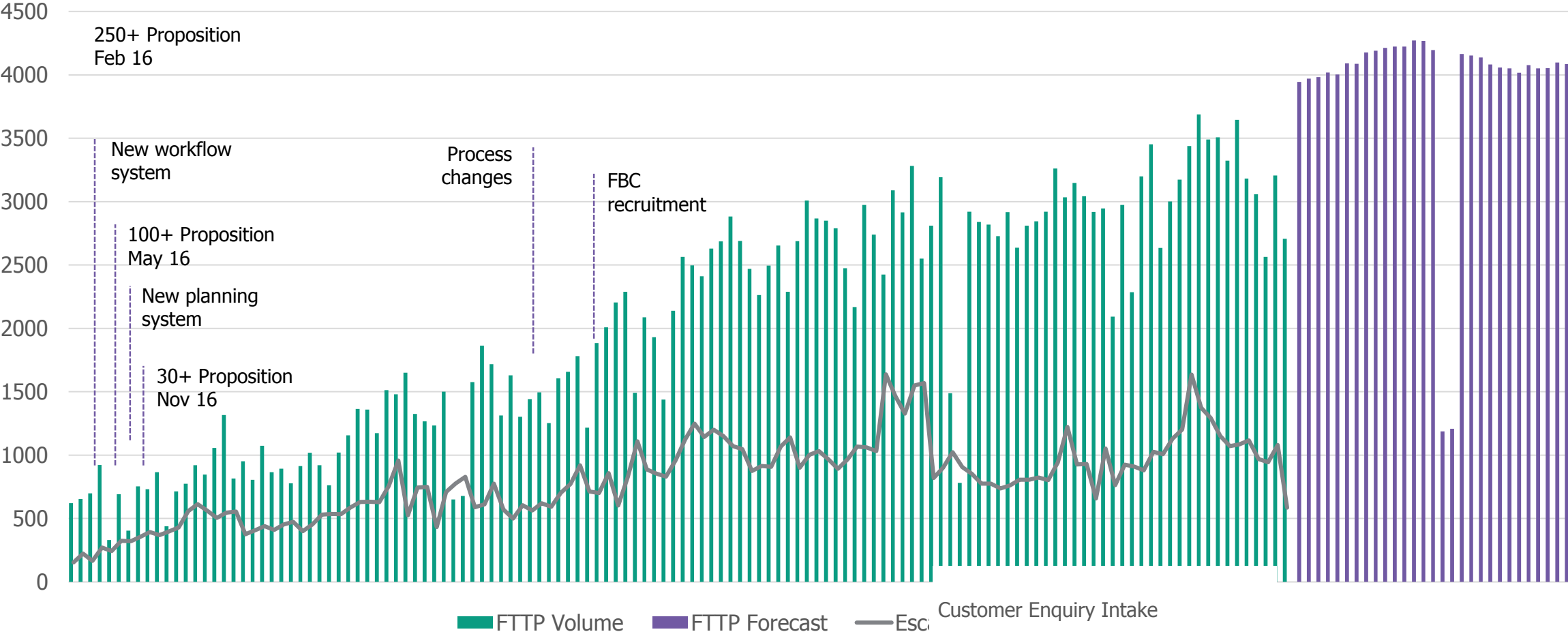
Innovation and transformation

With customers at the heart of everything we do, we're constantly making things slicker, quicker, and easier



Delivering large scale FTTP hasn't been easy

We've trebled our throughput already, and are continuing to deliver at pace



Simple and affordable for all types of developments

We've introduced a solution to enable all new builds to get full fibre, no matter what size

Smaller sites

1st November 2018

Official launch of standardised 2-29 rate card proposition for housing developers and industry



Commercial only sites

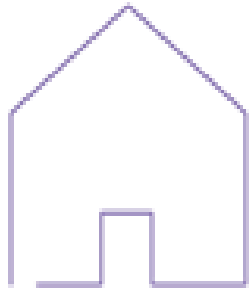
1st September 2019

Adoption of the standardised rate card for all commercial only sites of 2-29 plots



Choice and value for your customers

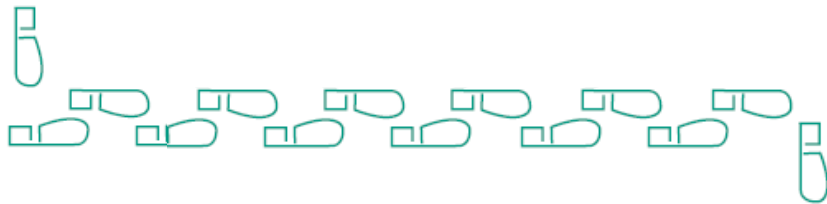
Homeowners can enjoy a bundled package via a choice of providers on the Openreach network



Customer's current home, connected to Openreach network

Cheaper bundled package from single CP with phone, TV and broadband

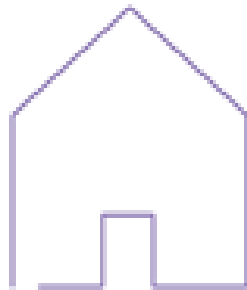
£39



£62

Restrictive broadband with single supplier, TV and phone additional cost

Customer's new home, with single supplier and no Openreach network



"Most people go for a package deal, but I couldn't do that. It's scandalous that there's such a lack of choice, and it's been much more of a pain than I thought it would be"



"The issue is the lack of choice and thus the lack of competition"

The Guardian

“My flat was built in 2017 so why can't I get BT or Sky broadband?”

Daily Record

“Homeowners who have bought properties on [redacted] newest estate say they are trapped in a “money-making scheme”

Why Openreach?



Fibre for free

We're passionate about ensuring as many people as possible have access to fibre broadband, so we provide full fibre to any site of 30 or more plots, meaning new home owners can enjoy ultrafast speeds.

Reliable, future proof and fast

Our full fibre network can easily handle the multiple connections users need now, and in the future. Homeowners can use as many devices as they like all at the same time, without performance being affected.

Uncontended network

Our fibre network has a dedicated path all the way back to the exchange with no shared capacity. It's not contended, so your homeowners can be assured of consistent speeds and high performance 24/7.

Open access

We are regulated to make our open access fibre network equivalently available for all Service Providers. Furthermore, we are also regulated to fully open our ducts and jointboxes up for other network providers to install their cables and equipment into. This makes it even easier for housing developers to give as much choice as possible by having more than one supplier on site. We build large and small New Sites across the UK, from Cornwall to Caithness!



TalkTalk
For Everyone
coming soon



openreach

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