



Delivering Economic Growth in Local London: Digital Connectivity Requirements



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Background and Vision

The availability of world class digital infrastructure across Local London is key to delivering economic prosperity and efficient public services. Most notably the growth objectives of the nation will only be achieved if the underlying infrastructure is available. Local London is one of the faster growing regions in the UK and an engine of growth for the UK economy.

The growth of London is eastwards. Local London has a concentration of opportunity areas as well as being the focus for extensive population and housing growth. Example priority areas include: Lee Valley and the UK Innovation Corridor, Thames Estuary – including Thames Freeport, Havering and Newham data centres, Barking Riverside, Thamesmead, Greenwich, Royal Docks and the Elizabeth Line corridor.

The vision for Local London is to be an exemplar digital corridor underpinning economic growth, linking London to key markets and growth areas; a sub-region where fixed and mobile service availability is ubiquitous and world-class in terms of speed and capacity.

The Challenge

Contrary to perceptions there are significant gaps in the commercial deployment of digital infrastructure services across our sub-region.

This is because:

- Industry has focused on the more commercially attractive markets in central London.
- There is a relative absence of competition in the deployment of digital infrastructure in Local London compared with central London and other UK cities.
- Costs are higher in London than elsewhere in UK.
- The scale and fragmentation of the London market.
- Central government subsidies have focussed on rural rather than urban areas.

As a result, we have significant challenges.

- We need more dark fibre deployed across the sub-region to stimulate investment in data centres and bandwidth intensive industries.
- Our sub-region requires greater availability of business-grade services.
- Many areas of the sub-region suffer from significant capacity challenges in mobile infrastructure (eg Stratford.)
- There are over 114,000 business and residential premises in the Local London sub-region unable to access gigabit capable services. This is impacting the delivery of public services, creating a digital divide and impacting the productivity of our small and medium sized businesses. Over 14,000 of our premises sit in a not spot, unable to receive a 30Mbps broadband service. Only 67% of premises are able to receive full fibre (FTTP) broadband services.

A summary of the situation is shown below.

Borough	Number of ALL Premises	Number of premises (FTTP)	FTTP coverage %	Gigabit Capable coverage %	Not Spot %	Number of Premises (<30Mbit/s)
BARKING AND DAGENHAM	83,735	72,073	86.1	92.9	1.0	842
BEXLEY	105,500	82,681	78.4	90.5	1.3	1,352
BROMLEY	148,017	73,892	49.9	91.2	1.3	1,958
ENFIELD	136,136	43,068	31.6	88.0	1.7	2,337
GREENWICH	128,236	91,998	71.7	86.5	0.8	1,078
HAVERING	114,093	81,343	71.3	87.3	1.9	2,126
NEWHAM	136,116	98,318	72.2	87.7	1.1	1,434
REDBRIDGE	112,238	87,366	77.8	90.2	1.0	1,143
WALTHAM FOREST	114,674	91,788	80.0	91.8	1.6	1,814
LOCAL LONDON	1,078,745	722,527	66.98	89.4	1.31	14,084

Source : Ofcom December 2024 Update

Our requirement

We urgently need to stimulate inward investment in digital infrastructure in the sub-region.

We are seeking to do this through extensive industry engagement to present the case and remove barriers to investment. However, we also require additional grant funding to deliver requirements and the growth vision for Local London. Currently major urban areas are excluding from accessing some streams of BDUK funding.

We need additional funding to:

- Expand dark fibre spines – notably to growth areas but also key areas of regeneration.
- Enhance service provision to public sector sites and assets.
- Anchor inward investment.
- Deliver local business and residential support to drive adoption (awareness, stimulation and possible connection subsidy.)
- Facilitate enhanced mobile coverage and capacity (eg neutral hosts, use of assets.)

Market forces alone will not deliver the infrastructure to facilitate growth; we need to be proactive, undertake selected interventions and compete for investment.

Contact us

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