Curia

Connecting Devon

Demonstrating the Value of Improved Connectivity

May 2023

wildanet

From anywhere to everywhere

Contents

Foreword

Digital Exclusion in Cornwall & Devon — Creating Gigabit-Capable Service and Digital Confidence for All

Wildanet believes that in the 21st Century, everyone has a right to digital connectivity. Our mission is to end digital poverty through 'connecting people, communities, and businesses, wherever they are in Cornwall and Devon'.

Since we started, Wildanet has enjoyed significant growth — from just seventeen employees in 2017 to over 180 today, and with plans taking us to over 300 in the next two years — and we pride ourselves on deliberately employing local people, nurturing, and developing our talent, and helping our team to flourish. By training our engineers and colleagues through Wildanet's Training Academy, we ensure we have the in-house skills to serve the Cornwall and Devon communities.

This means we are true to our purpose — a South West company employing local people. We are now expanding from Cornwall our build and services across Devon with the intention of providing gigabit-capable coverage for the South West.

This growth has been achieved in partnership with the Government's Project Gigabit programme — a key to our success. In January 2023, Wildanet was awarded £36 million under the scheme to roll out our network in Mid and West Cornwall. This is providing a lifeline to both rural and urban communities who desperately need to live safely and securely in the digital age.

Key to supporting our rollout in Devon is the need to understand the value of gigabit connections for the economy, jobs, social value and the environment. At Wildanet, our experience in delivering Gigabit Broadband in Cornwall has given us the valuable insight that we also need to ensure people have the skills and confidence to fully participate in an ever-evolving digital landscape if we are to be successful in reducing digital exclusion. Therefore, we have continued our relationship with Curia, whom we commissioned to write this independent report on digital exclusion including the link to digital skills in Devon to help us arrive at a clear strategy to ensure our plans will make an active and positive contribution to reducing the digital divide and we don't assume that Cornwall and Devon´s needs are necessarily the same in this undertaking.

As the CEO of a company that is keen to promote digital literacy and inclusion, I believe that this report highlights important issues and offers valuable insights into how we can better equip people, communities and businesses in Devon with the four core digital capability pillars of gigabit-capable coverage, affordable services, digital skills, and access to devices and applications they need to thrive in an increasingly digital World. We all recognise that the past few years have seen a rapid transformation in the way we live, work, and interact with one another, which has been driven in large part by the proliferation of digital technologies. However, despite the many benefits that digital tools and services offer, there are still tens of thousands of people in Devon who lack the necessary access to gigabit-capable broadband, skills and knowledge to use them effectively.

This independent research offers an exciting opportunity to identify effective solutions to digital inclusion in Devon. It also highlights that we need to ensure the necessary infrastructure is in place to ensure people have the capability and confidence to contribute to society. The report provides a comprehensive overview of the current state of digital gigabit-capable coverage and skills in Devon, and I hope that it will serve as a call to action for all of us to work together to create a more digitally accepting, literate and inclusive society.

> **"We need to ensure people have access to gigabit-capable broadband at an affordable price and can acquire the necessary skills and confidence to fully participate in an ever-evolving digital landscape."**

Helen Wylde
CEO Wildanet

Executive Summary

The World is seeing unprecedented investment in and delivery of fibre and mobile broadband infrastructure, and the UK is no exception. There is a recognition that high bandwidth and secure connectivity are the means to enable new digital transformation to improve economies and productivity, achieve Net Zero ambitions and facilitate the transition to a modern society whilst also providing new ways to better manage social exclusion and create new social value. The five main 'mega-trends' that are fuelling this investment are remote working, connected devices, adoption of cloud technology, the digital and green transformation of public and private sectors, and artificial intelligence. Therefore, the need for reliable, high-bandwidth, secure, interoperable data transmission is creating the investment, supply, and demand to prioritise the delivery of new infrastructure in a 'perfect storm'. In addition to these trends, there is an immediate need to address efficiencies and inequalities in public services, such as education and healthcare, to meet the needs of an increasingly digitally aware society. For example, during the Covid-19 pandemic, 46 per cent of people were unable to access critical services online due to an unreliable Internet connection (Cisco Broadband Index 2022). This included medical appointments, online education, social care, and other public and utility services.[i]

This report explores the economic, social, and environmental impacts of future gigabit-capable broadband speeds across the county of Devon (including Plymouth and Torbay), building on the Superfast Broadband Programme initiatives in the decade between 2011 and 2022. In that period, superfast broadband coverage has grown to over 98 per cent of premises in Plymouth and Torbay and over 93 per cent in Devon. [ii]

However, the predominant technology deployed continues to use old (copper) infrastructure, which will always limit the potential speeds, resilience, and benefits for existing and future generations. There also remain significant gaps in gigabit-capable broadband coverage, whether these are in whole communities or groups of homes or businesses that have so far been excluded from investment. This has been recognised by the Government and the market, and an extensive new phase of full-fibre and gigabit-capable broadband rollout and intervention has commenced, which will address

part of the challenge. Project Gigabit is a £5 billion intervention programme from the Department for Science, Innovation & Technology (DSIT). It aims to stimulate the broadband market and local authorities to deliver new gigabit infrastructure to areas where it would not normally have been possible and to cover 85 per cent of premises nationally, and 'nationwide' coverage (c.99 per cent), by around 2030. Project Gigabit is, thus, designed to focus on improving connectivity for those rural and semi-rural areas in the final 20 per cent (5-6 million UK premises). This consists of several support schemes, including gigabit vouchers to subsidise connections, public sector network improvements, and gap-funded deployments with suppliers, better known as the Gigabit Infrastructure Subsidy (GIS) programme.

At present the DSIT/Building Digital UK (BDUK) plan is currently the largest English initiative through Project Gigabit and includes 85,800 premises and a £164.3 million subsidy investment. The current DSIT / BDUK market analysis (which is under review) has identified 117,000 premises across Devon and Somerset that will likely require government intervention funding if they are to receive fibre gigabit broadband services. It is anticipated that £150 - £300 million in subsidy investment will be allocated to deliver this programme of works. [iii]

There is also significant scope for other private sector investment in building gigabit coverage in Devon. This will be essential to reach the full potential of economic, social, and environmental impact beyond 2025. Coverage levels for gigabit broadband are already high in Plymouth (91 per cent) and Torbay (88 per cent), which both have significant Openreach and Virgin Media presence. However, full-fibre, or FTTP (Fibre to the Premises), coverage is lower and Alternative Network (Alt-Net) operator coverage is extremely low, which may ultimately prevent the availability of maximum competition and best choices and prices for customers. Full-fibre coverage in Plymouth is 27 per cent (2.3 per cent Alt-Net) and 82 per cent (0.09 per cent Alt-Net) in Torbay. In the rest of Devon, the gigabit coverage is 54 per cent, the full-fibre coverage is 49 per cent and the Alt-Net coverage is 18 per cent. Thus, 46 per cent of this area has no 100 Mbps coverage at all. The current UK-wide coverage of gigabit broadband stands at 75 per cent.[iv]

The case for gigabit-capable broadband is compelling and has been accelerated by the consequences of the Covid-19 pandemic, with home working, video communications, remote services, online banking, and direct retail operations creating huge, unprecedented demand. In a business environment, especially for small to medium-sized organisations, the availability of high-bandwidth, resilient, and affordable communications services is essential and helps underpin turnover growth, productivity, new jobs, and investment. In recent years, other studies in recent years have highlighted the social and environmental benefits of improved infrastructure, including 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 Devon. Post-pandemic, the changes in remote working and re-thinking office space and location has presented a significant new opportunity for Gross Value Added (GVA) growth, diversification, and productivity. There are also benefits in terms of developing the digital economy with IT and software companies, and businesses that rely on fast, reliable infrastructure to grow and enable their staff to benefit from flexible working. Mobile networks, including 5G and beyond, require full-fibre broadband — especially in rural or semi-rural areas — to maximise their coverage and ensure mobile broadband traffic can cope with increased customers and usage.

Other regions in the UK, and internationally, have forged ahead with gigabit-capable coverage, notably Northern Ireland (92 per cent) and Greater Manchester (78 per cent) — the role of government intervention and local service providers cannot be underestimated in this. Where alternative network providers are building, quicker and better coverage is apparent and along with it, the associated benefits. The presence of a local service provider, with investment and community plans for delivery and creating demand, will create added impetus and benefits, like with Fibrus in Northern Ireland. 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.

This report assesses the potential impact of gigabit-capable broadband in Devon, including on the economy, social value and wellbeing, and environmental net-zero savings. The assumptions are that it will be universally available by 2030 and extensively available by 2025, the Government target is 85 per cent coverage nationally.

Gigabit-Capable Broadband Coverage in Devon

What is the current picture in Devon for gigabit-capable broadband?

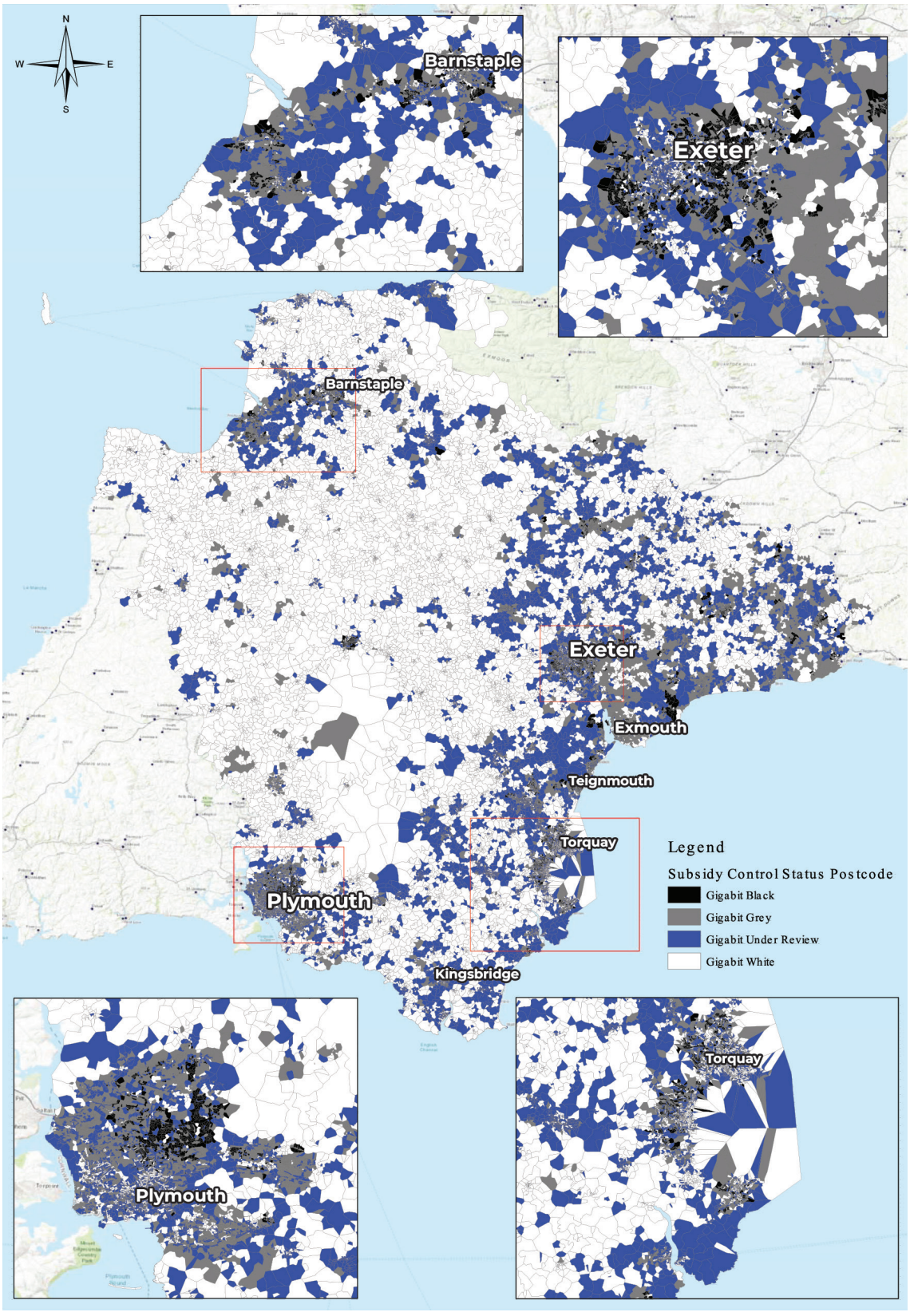
There are approximately 618,354 premises in Devon[v], including homes, businesses, and public sector buildings, with the following percentage coverage as of April 2023:

Broadband Coverage	Superfast 24mbps+	Full-fibre 100mbps+	Gigabit-Capable 100mbps+
Devon	93.3%	48.85%	54.35%
Plymouth	98.55%	26.76%	90.76%
Torbay	98.54%	82%	88.14%
United Kingdom	97.76%	49.85%	75%

Source: ThinkBroadband

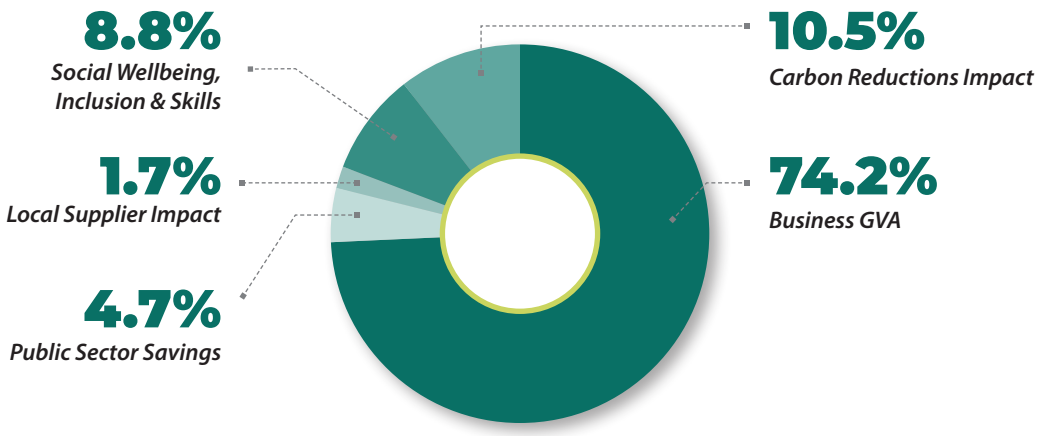
A map of the counties of Devon showing where gigabit-capable broadband is currently, and shortly to be, available (black and grey coded premises) shows that the gaps in coverage are dispersed throughout Devon[vi]. This is because commercial operators have deployed infrastructure where it is economic to do so and where they perceive demand is present. The other areas (blue and white coded) are either under review for gigabit-capable broadband or where it is not planned to be made available.

Figure 1: UK Gigabit Programme for Devon

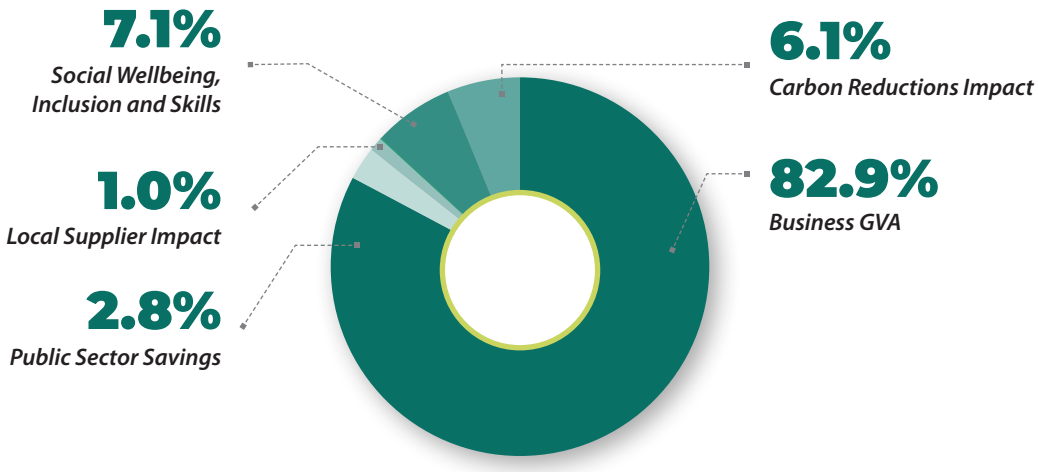


Headline Findings

Annual value of Gigabit Broadband to Devon by 2025



Annual value of Gigabit Broadband to Devon by 2030



In Devon, gigabit-capable broadband across the county could generate the following by 2030:

- **£1.125 billion** of new business gross value added (GVA) and £160 million business GVA safeguarded per annum by 2030.

- **c.£8 million** of cashable public sector network savings per annum.

- Over **£30 million** savings per annum across the public sector for a new integrated plan for remote digital healthcare, if completed in conjunction with an integrated plan for digital inclusion and upskilling.

- **Local supplier impact.** Wildanet is a local, independent broadband provider with a growing presence across Devon, Cornwall and the South West, including a new training centre in Liskeard. There are currently 40 full-time employees in Devon, this number will grow substantially by 2025 and beyond. Local Devon engineering contractors, suppliers, and resources are also being indirectly employed to support the infrastructure and services in the county.

- A social wellbeing, digital inclusion, upskilling and employment impact of **£380 million** by 2030.

- Over **£400 million** of equivalent carbon taxation savings between 2021 and 2030 (£45 million per annum by 2025 and £83 million per annum by 2030).

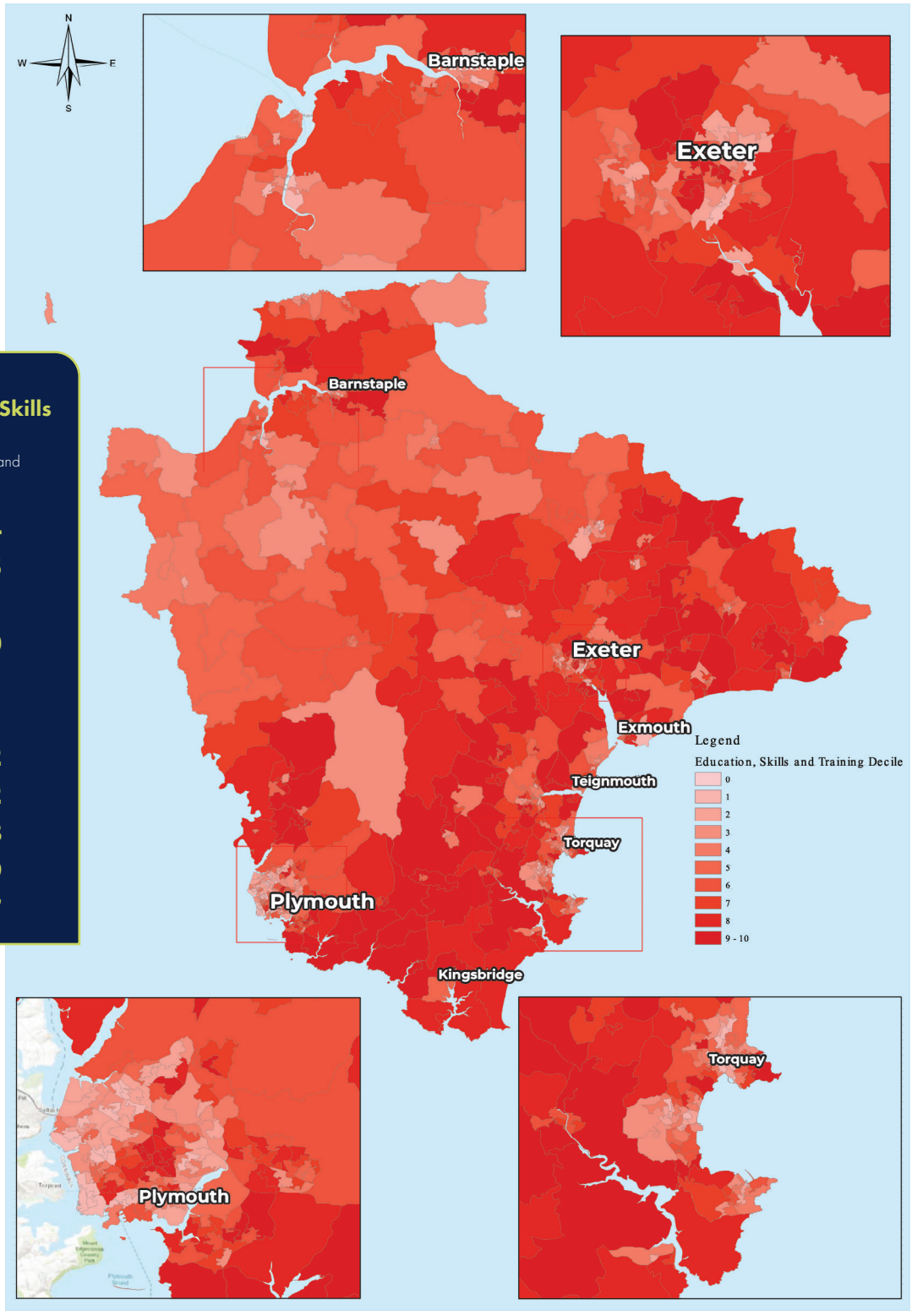
Population Analysis in Devon

While Devon overall is on par with the national average for education, skills and training, employment and health deprivation and disability deciles, some council areas are performing below the national average.

Education, Skills and Training Decile

- South Hams has the best education, skills, and training decile in the county at 7.84
- Torridge has the worst education, skills and training decile in county at 4.27

Figure 2: Education, Skills and Training Decile in Devon



Council´s Education, Skills and Training Decile*
(Higher the better education, skills and training decile)

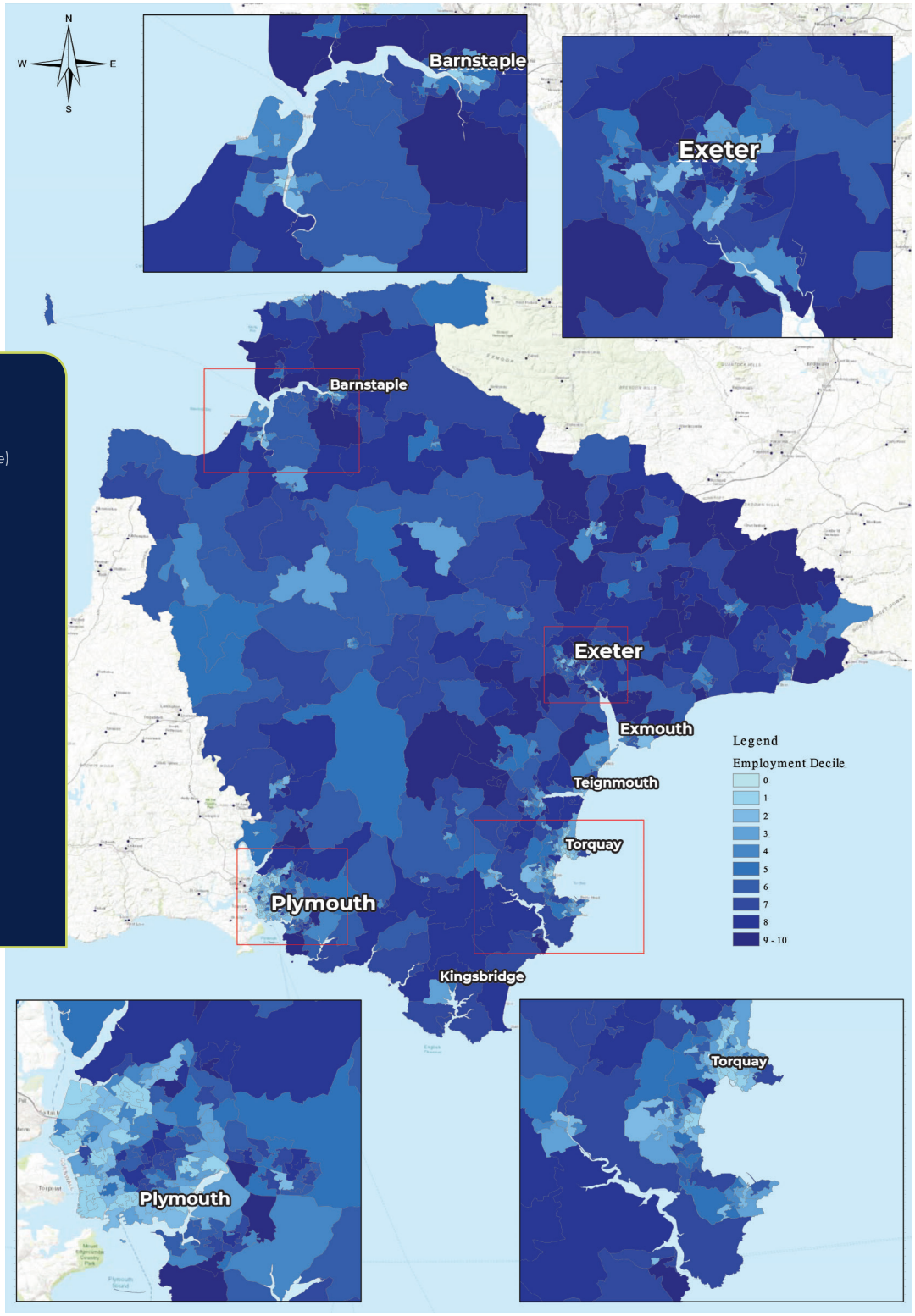
South Hams	7.84
West Devon	6.55
East Devon	6.31
Teignbridge	6.20
Exeter	5.91
National Average	
Mid Devon	5.42
North Devon	5.12
Plymouth	4.68
Torbay	4.29
Torridge	4.27

* The league tables have been calculated using data from recent Office for National Statistics data May 2023. The national average is 5.50, with the county average at 6.00.

Employment Decile

- East Devon has the best employment rate in the county at 6.40
- Torbay has the worst unemployment rate in the county at 3.39

Figure 3: Employment Decile in Devon



Council´s Employment Decile*
(Higher the lowest unemployment rate)

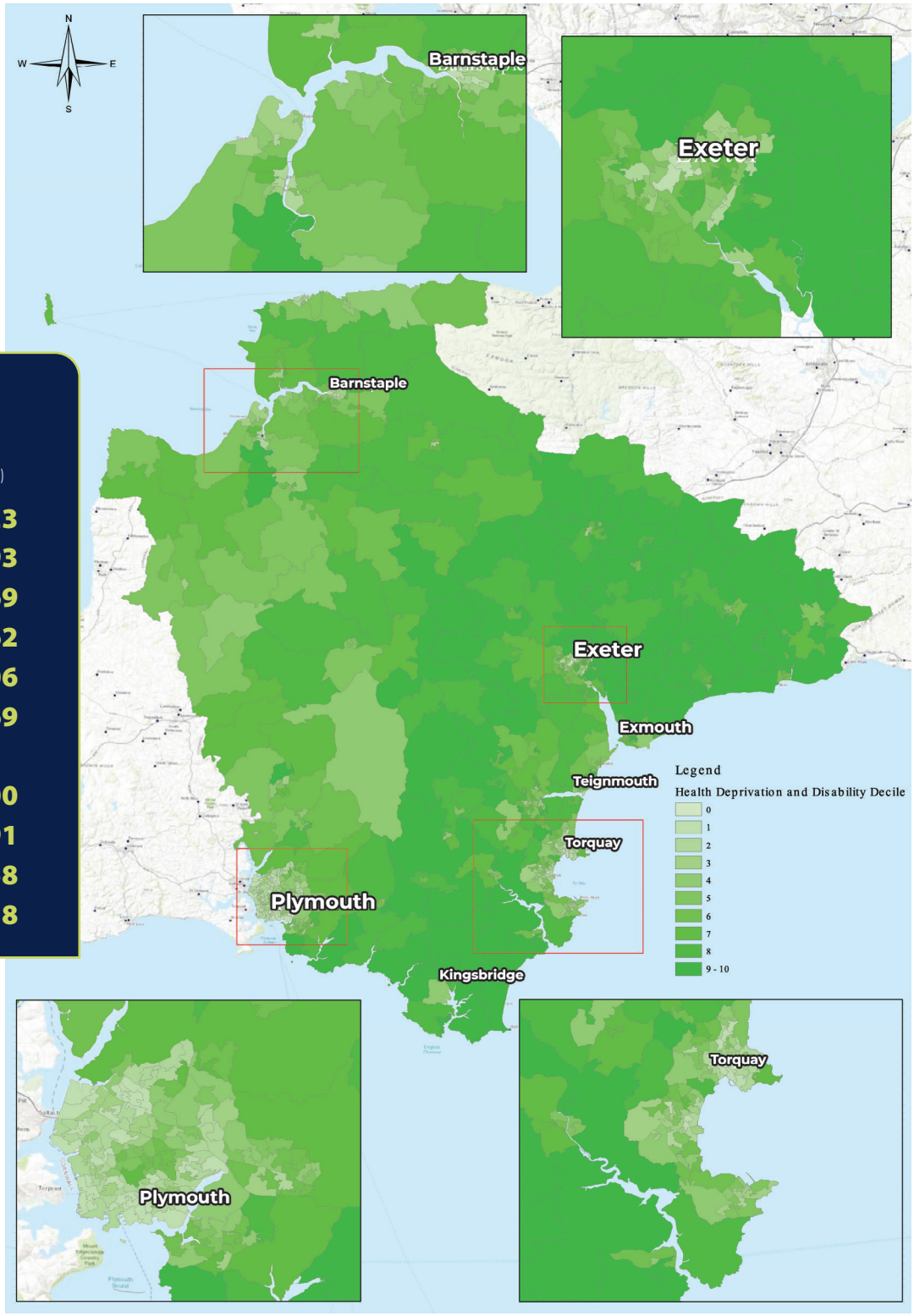
East Devon	6.40
South Hams	6.37
Mid Devon	6.33
Exeter	6.14
Teignbridge	5.99
West Devon	5.61
National Average	
North Devon	5.45
Torridge	4.84
Plymouth	4.20
Torbay	3.39

*The league tables have been calculated using data from recent Office for National Statistics data May 2023.
The national average is 5.50, with the county average at 5.97.

Health Deprivation and Disability Decile

- Mid Devon has the best health deprivation and disability decile in the county at 8.23
- Plymouth has the worst health deprivation and disability decile in the county at 3.18

Figure 4: Health Deprivation and Disability Decile in Devon



Council´s Health Deprivation and Disability Decile*

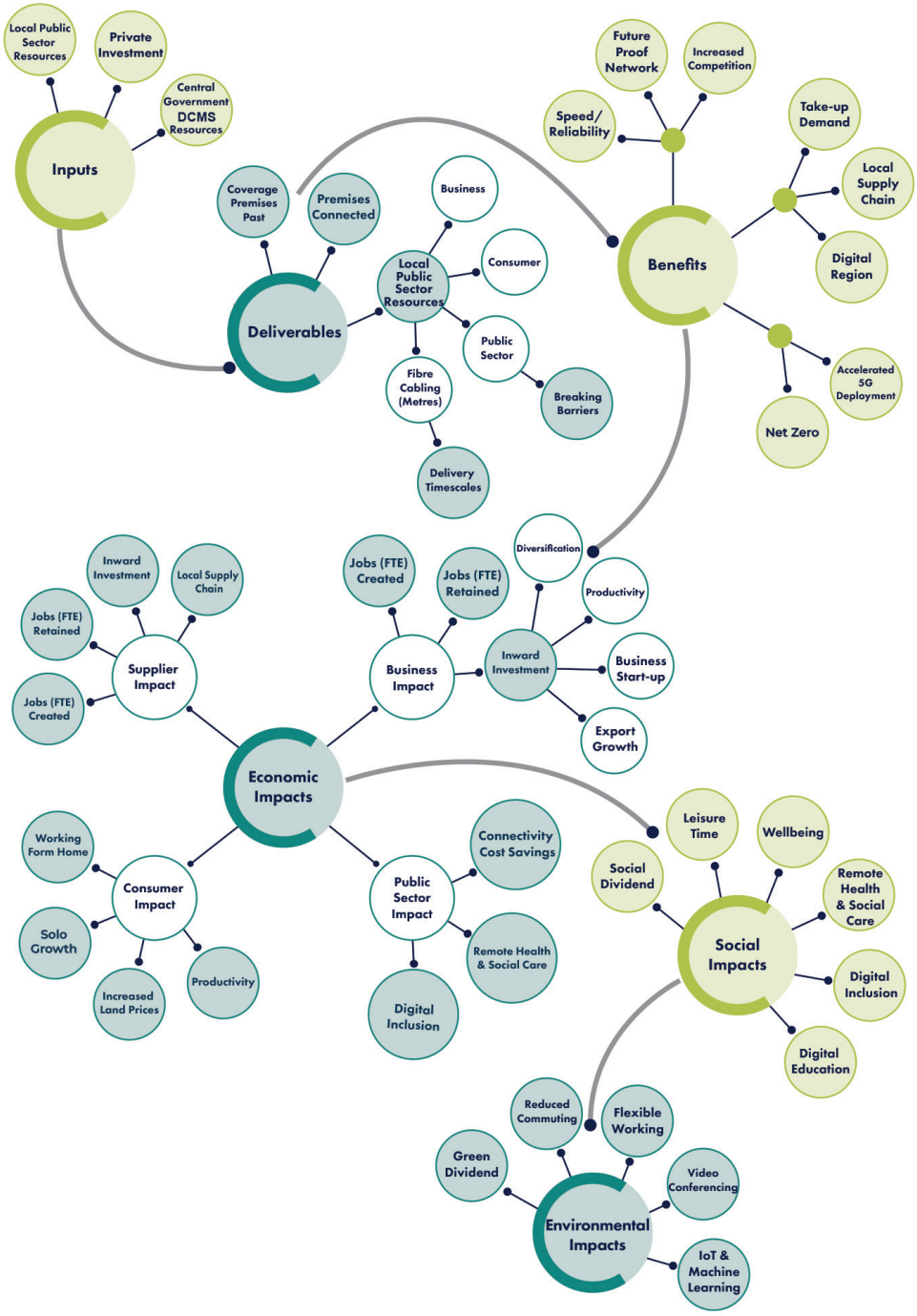
(Higher the least health deprivation)

Mid Devon	8.23
East Devon	7.93
South Hams	7.69
Teignbridge	6.62
West Devon	6.06
Exeter	5.69
National Average	
Torridge	5.00
North Devon	4.91
Torbay	3.58
Plymouth	3.18

*The league tables have been calculated using data from recent Office for National Statistics data May 2023. The national average is 5.50, with the county average at 6.58.

Measuring the Impact of Gigabit Broadband in Devon

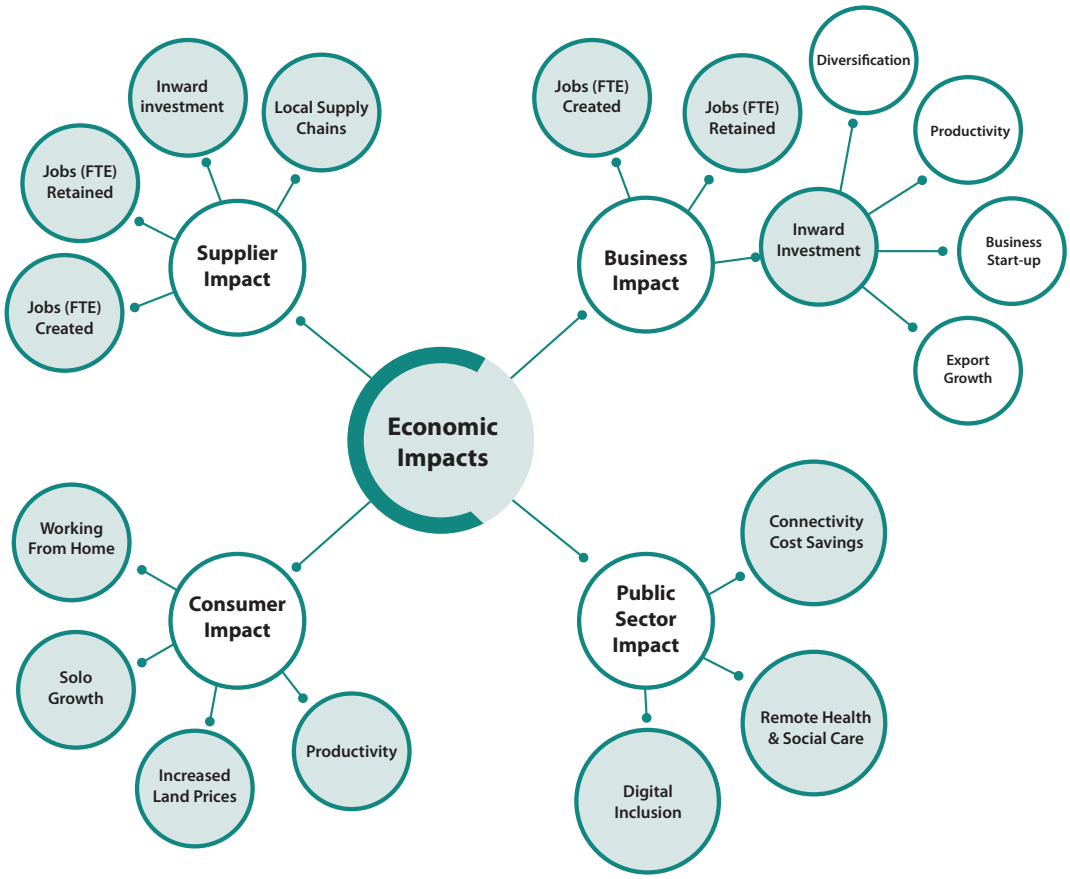
Figure 5: Model to Evaluate the Impact of Gigabit Broadband on Devon



A model has been created to assess the overall social, economic and environmental benefits created as a result of further rollout of gigabit broadband across Devon.

Economic Benefits

Figure 6: Economic Impacts Model



Business GVA*

- Faster broadband stimulates productivity growth, increased revenue, diversification, and export potential.
- Gigabit-capable broadband will help accelerate the growth of small business and home office start-ups, sole traders, flexible working, and new teleworkers living or relocating in the county. New business start-up growth and a significant increase in remote working jobs advertised since 2020 have a dependency on gigabit-capable broadband availability. According to the Cisco Broadband Index (2022) 51 per cent of workers now rely on home Internet to work from home or run their businesses and 71 per cent believe that everyone should be able to access fast, reliable Internet regardless of location. [vii]
- 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 could create £1.125 billion of new gross value added (GVA) and £160 million GVA safeguarded by 2030 in Devon. With 54 per cent of the county having gigabit broadband available today (April 2023), this impact has started, but it is vital that the whole county be able to benefit — including businesses everywhere for true levelling-up opportunities.[viii]

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* ONS data documents 49,240 registered businesses in Devon and BEIS data indicates a further 63,500 unregistered businesses. [ix]

Public sector cashable savings

- More affordable connectivity for public sector office and hub locations should realise c.£8 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.
- This could be significant for a county such as Devon, with 25.3 per cent of the population over 65 compared to the national average of 18.6 per cent. The population of Devon is expected to increase by more than 33,000 by 2024, the equivalent of the town of Exmouth. The number of people in Devon aged over 75 years old is expected to rise by more than 20 per cent in the next five years, with the number of people aged over 85 years old expected to rise by more than 11 per cent.[x]
- As documented in the NHS Long-term Plan (2019), digitally enabled primary and outpatient care will go mainstream across the NHS. Over the next five years, every patient in England will have a new right to choose this option — usually from their own practice or, if they prefer, from one of the new digital GP providers. [xi] This has become even more popular and relevant since the Covid-19 pandemic — there were approximately 4.5 million video consultations in England between March 2020 and March 2021.[xii]
- The Crown Commercial Service has launched a new approved route to market from NHS England for virtual wards, long term conditions (remote monitoring), continuous monitoring, and spot monitoring. [xiii] This provides digitally enabled clinical care pathways for buyers such as commissioners within NHS England, social care organisations, clinical commissioning groups, primary care networks, NHS trusts, and NHS special health authorities.

Wildanet engineers undertaking training at Wildanet's Training Academy

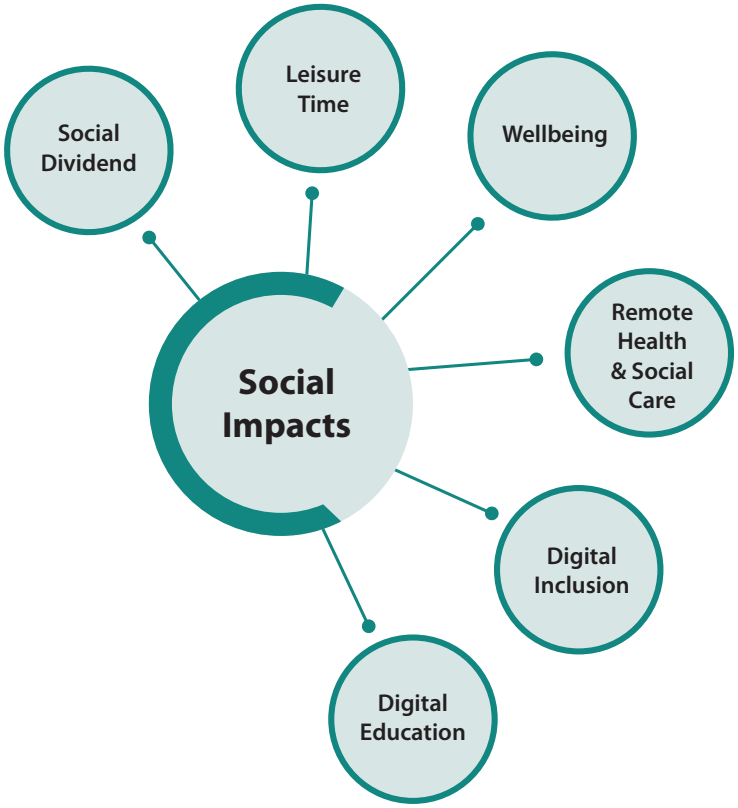
- Devon acts as a microcosm of the UK healthcare system so, with improved connectivity, the county will become a perfect place to test and launch new digital healthcare solutions. It can also realise new models of delivery, such as virtual wards and remote monitoring, where patients can access services from home, facilitated by some healthcare workers also online at home.
- Devon provides a unique opportunity to engage with the NHS and independent healthcare services and work directly with their clinicians and researchers.
- Care monitoring alarms will require replacement by 2025 as BT switches off its analogue network. Agile 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.

Local supplier impact

Wildanet is a local, independent broadband provider with a growing presence across Devon, Cornwall and the South West, including a new training centre in Liskeard. There are currently 40 full-time employees in Devon and this number will grow substantially by 2025 and beyond. Local Devon engineering contractors, suppliers, and resources are also being indirectly employed to support the infrastructure and services in the county.

Social Wellbeing Impact

Figure 7: Social Impact Model

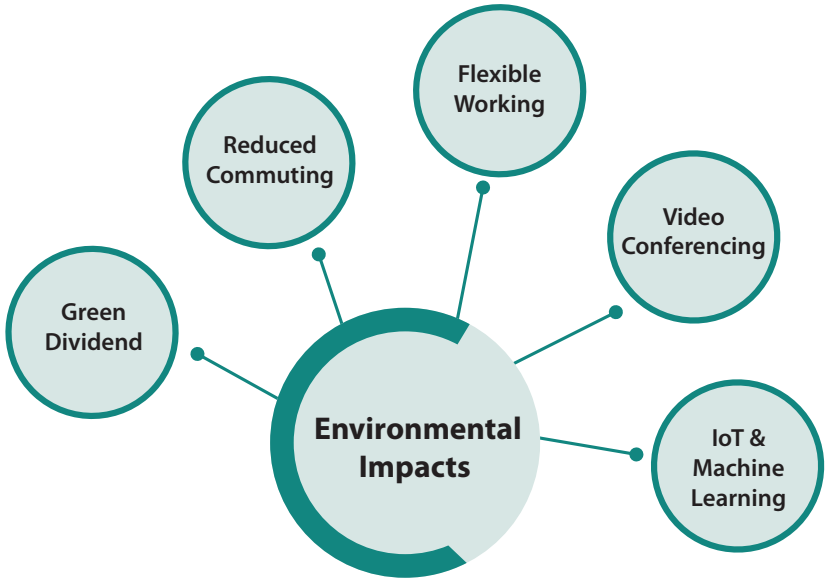


- Gigabit-capable broadband will play a major part in addressing digital inclusion and the digital divide that affects all age and socio-economic groups. It is possible to measure the likely impact of this infrastructure on wellbeing, skills, education, and employment opportunities but it is important to support individuals with the digital skills and confidence needed to get online and fully utilise services and apps that will benefit them.
- There is a projected £222.25 impact on wellbeing per household, per annum [xiv]. In addition, there is an estimated £1,000 wellbeing value for individuals with low or very low essential digital skills[xv]. In the Lloyds Bank Consumer Digital Index (2022), some 39 per cent of people in the South West had low or very low digital skills. In Devon, 78,000 people have never used the Internet. [xvi]
- There is also a one-off benefit of £807 for those seeking employment, which is typically now done online and is where essential digital skills for work are required. In the South West, some eight per cent of people have no digital abilities for work and only 37 per cent of people have the ability to do all 20 essential digital tasks necessary for work. [xvii]
- New evidence is also available regarding bringing groups that were previously excluded from the workforce into employment, which would lower inequality and poverty. Through home and flexible working, employers will be able to retain experienced employees (at least on a part-time basis) whom they would otherwise lose due to their age or caring responsibilities. These opportunities will be created right across the UK, provided the digital infrastructure is in place to support them, helping to address issues of regional inequality. [xviii]
- According to the Cisco Broadband Index (2022), 69 per cent of people believe that fast, reliable Internet is critical to a well-educated population. In addition, digital poverty studies have identified over a million children in the UK who are falling behind due to the fact that half of all set homework is completed online and slow, unreliable broadband (especially in rural areas) impacts their ability to complete this satisfactorily. [xix]

- Social tariffs for broadband service are very important for digital inclusion, especially for those on Universal Credit, Pension Credit, and other welfare benefits. Providing an affordable service opens up these wellbeing, employment, education, and health opportunities for all, an example being the Wildanet Helping Hand Social Tariff. [xx] Providing a free service for a digital hub in a community also creates the potential for maximising digital inclusion and building confidence and usage, to the point where the Internet becomes essential and can help transform lives.
- The combination of these impacts will benefit Devon citizens positively, by £380 million, by 2030.
- This figure is also consistent with other research, which suggests that for every £1 spent on digital inclusion, there is almost £10 benefit to UK PLC. This includes the social, wellbeing, and economic impact. [xxi]

Environmental Impact

Figure 8: Environmental Impacts Model



- According to the Royal Society, digital technology could deliver almost one-third of the carbon emission reduction required by 2030. [xxii]
- Experts at the Centre for Economics and Business Research (Cebr) took a closer look at the impact of a fully fibred nation. Their report found that a faster and more reliable full fibre connection can give people the same levels of access to everything they can do online in an office, remotely from home. The research suggests that by enabling more people to work from home, a full fibre nation could save 300 million commuting trips each year — with three billion fewer kilometres travelled by car. That is a saving of more than 360,000 tonnes of CO2 emissions. A further study by Telework Research Network suggests that if half the UK workforce worked from home just twice each week, it would reduce UK transportation emissions by four per cent, the equivalent of taking 2.5 million cars off the road.
- Cebr research suggested that the estimated UK wide environmental impact of an additional 1,911,868 workers mainly working at home would be an annual saving of just over 700,000 tonnes of CO2 emitted from car commuting trips. In addition, other public and private organisation service visit savings being replaced by telecare or tele-medicine appointments would increase this further.
- Based on these estimates, the additional impact of gigabit broadband in Devon could be over £400 million of equivalent carbon taxation savings between 2021 and 2030 (£45 million per annum by 2025 and £83 million per annum by 2030).

Wildanet's 35,000 sq ft warehouse in Bideford, North Devon (aerial view)

Glossary

Gigabit-capable broadband

Gigabit-capable broadband means download speeds of at least 1 gigabit-per-second (1 Gbps or 1000 megabits per second, Mbps). A 1 Gbps download speed would allow a high-definition film to be downloaded in under 1 minute.

Gigabit-capable broadband can be delivered by a range of technologies, including full-fibre connections, high-speed cable broadband and, potentially, 5G networks. [xxiii]

Unregistered businesses

These are typically sole traders who do not have to register with Companies House and may not be registered for VAT. However, they do have to maintain accounting records, pay income tax, and file a self-assessment return with HMRC every tax year.

Endnotes

i Cisco Broadband Index UK 2022

ii thinkbroadband.com. April 2023

iii UK Government. February 2023. https://www.gov.uk/government/publications/project-gigabit-delivery-plan-winter-update-2022-to-2023/project-gigabit-winter-update-2022-to-2023

iv thinkbroadband.com. April 2023

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vi DSIT/Building Digital UK (BDUK) Open Market Review. January 2023

vii Cisco Broadband Index UK 2022

viii This assumes universal coverage and service take-up consistent with current trends

ix Office for National Statistics (ONS) — Inter-Departmental Business Register (IDBR) March 2022 and BEIS - Business population estimates for the UK and regions 2022 October 2022

x Devon CCG: Strategy for General Practice in Devon Five year plan 2019 - 2024

xi NHS Long Term Plan 2019

xii National Library of Medicine - Achieving Spread, Scale Up and Sustainability of Video Consulting Services During the COVID-19 Pandemic. Findings From a Comparative Case Study of Policy Implementation in England, Wales, Scotland, and Northern Ireland (2021)

xiii Crown Commercial Service - How to implement innovative virtual wards and remote patient monitoring technology (Feb 2023)

xiv Evaluation of the Economic Impact and Public Value of the Superfast Broadband Programme. 2018. Ipsos Mori and Simetrica-Jacobs

xv Lloyds Bank UK Consumer Digital Index 2022 and Lloyds Bank and Future. Now UK Essential Digital Skills for Work. March 2023

xvi ONS, Internet Users in the UK 2021

xvii Lloyds Bank UK Consumer Digital Index 2022

xviii Centre for Economics and Business Research. April 2021

xix U-Switch Digital Poverty Report 2019

xx wildanet.com/wildanet-social-tariff

xxi Good Things Foundation, The economic impact of digital inclusion in the UK, July 2022

xxii Royal Society, Digital Technology, and the Planet (December 2020)

xxiii UK Parliament House of Commons Library, Gigabit-broadband in the UK: Government targets and policy (2022)

About Us

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 can lead to 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 and Devon-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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