

PE2127/D: Develop a new Digital Connectivity Plan for the Highlands and Islands

Scottish Government written submission 27 March 2025

Thank you for your letter dated 3 March 2025 regarding petition *PE2127: Develop a new Digital Connectivity Plan for the Highlands and Islands*. In your letter, you outlined that the Committee was keen to understand:

- whether the Scottish Government will develop a new Digital Connectivity Plan for the Highlands and Islands;
- what the timeline is for procurement in the Highlands and Islands for Project Gigabit.

Over the past ten years, digital connectivity across the Highlands and Islands has been transformed. Scottish Government-led programmes such as Digital Scotland Superfast Broadband (DSSB) and Reaching 100% (R100) have extended fibre networks – the backbone that enables fast, reliable broadband and mobile services – boosting coverage across the region from 18.6% in January 2014 to 95.2% today.

Our award-winning Scottish 4G Infill programme delivered 55 mobile masts to rural and island ‘not-spots’ across the country, 37 of which were in the Highlands and Islands region. This has helped contribute to the increase in 4G coverage in Scotland from 78% in 2018 to 89% by the end of 2024. Commercial mobile, fixed wireless access (FWA) and 5G private networks have helped extend fibre’s reach and enable high-speed connectivity.

Alongside this, commercially available Low Earth Orbit satellite services are available across all of the Highlands and Islands, helping to fill coverage gaps where fibre and wireless technologies are not yet affordable to deliver, and providing a low latency, ultrafast solution for isolated rural properties. This combination of terrestrial and non-terrestrial digital solutions forms a comprehensive toolkit ensuring that everyone in the Highlands and Islands, regardless of their location, can play a part in the digital economy.

Will the Scottish Government develop a Digital Connectivity Plan for the Highlands and Islands?

We currently have no plans to develop a distinct Digital Connectivity Plan for the Highlands and Islands. There is substantial activity ongoing

to improve connectivity across the region, but it is not apparent that developing a separate approach for the Highlands and Islands in isolation would add any immediate value.

The Scottish Government recognises that effective digital connectivity is an essential part of modern life, ensuring that our rural and islands communities are an integral part of the economic, social, and environmental wellbeing of Scotland.

Our primary focus in the coming years will be to deliver on existing plans, building on the significant investment that has already delivered over 200,000 faster broadband connections across the Highland and Islands so far, through the R100 and DSSB programmes. Developing a new bespoke plan for the region could divert resources from that work, ultimately hindering progress.

Of course, we recognise the need to provide the public with regular, transparent progress updates. People in the Highlands and Islands rightly expect to know what connectivity is available now, what's coming and when they can access it. Our online content at <https://digitalconnectivity.campaign.gov.scot/> provides up-to-date information, including an address checker.

It is also important to recognise that telecoms in the UK is reserved to Westminster. As a result, many of the levers required to develop and deliver comprehensive regional connectivity plans, particularly around funding, are not held by the Scottish Government.

We have, however, set out clear ambitions for connectivity across the country. A core theme of Scotland's Digital Strategy is ensuring that no one is left behind in the digital world and that geography should not be a barrier to getting online, which is helping to focus investment to extend digital infrastructure even further into Scotland's rural communities. A refreshed Digital Strategy, taking into account connectivity priorities, is expected to be published this summer.

Scottish Ministers have also announced that a new National Islands Plan will be published later this year. Officials are working with island communities, local authorities, and other partners to ensure that the new Plan continues to deliver our vision for thriving, sustainable, and successful island communities.

The new Plan will integrate digital connectivity with other key priorities, making a separate connectivity plan unnecessary.

The Islands Team is currently conducting a series of in-person meetings across the six island local authorities to gather more information which will be fed into the new National Islands Plan. The public consultation on the first National Islands Plan and the Scottish Island Survey 2023 both highlighted digital connectivity as one area where islanders felt positive progress had been made.

What is the timeline for Project Gigabit in the Highlands and Islands?

Our Reaching 100% (R100) programme is already delivering gigabit capable connectivity across rural Scotland with over 9,500 connections delivered to date across the Highlands and Islands region, with many more still to come.

The Scottish Government is also taking a lead role in the delivery of Project Gigabit in Scotland; recognition of our strong track record in successfully delivering large scale digital infrastructure programmes.

Project Gigabit is a UK Government programme which aims to achieve UK-wide (c.99%) gigabit-capable coverage by 2030. The Scottish Government is playing the lead role across all local and regional contracts in Scotland.

Scotland's challenging geography makes targeted public subsidy essential to delivering digital infrastructure. To target this investment and maximise impact, we have worked with Building Digital UK (BDUK) to consult the supplier market extensively and understand their appetite to extend existing gigabit networks. This allowed us to design local and regional procurements with the best chances of succeeding and delivering for the communities in question.

Key milestones include:

- May 2024: First Scottish Project Gigabit procurement launched, covering the Borders and East Lothian. Contract awarded January 2025.
- May 2024: North East Scotland procurement launched, including premises in parts of Aberdeenshire, Angus, Dundee and the Moray Coast. Contract award expected Spring 2025.
- December 2024: Shetland and Orkney procurement launched. Bids due in June 2025 with contract award expected October 2025.

Confirmation of which premises will be connected via each contract, and in what timescales, will be confirmed by winning suppliers post-contract award. Our online address checker - <https://digitalconnectivity.campaign.gov.scot/> - remains the best resource for communities in the Highlands and Islands to track progress.

Project Gigabit procurement timelines are subject to change but we engage regularly with key stakeholders, such as Highlands and Islands Enterprise and local authorities, and will communicate any changes and share updates with the public as and when we are able to, within the constraints of procurement regulations.

Those areas of Scotland not covered by these procurements will be included in the nationwide framework contract awarded by UK Government to Openreach last year. Openreach is currently modelling its build plan with a view to commencing work later this year.

The Scottish Government is working closely with UK Government to ensure that there is alignment between Openreach's Project Gigabit activity in Scotland and existing R100 plans. There should be scope to combine planning in order to drive efficiencies and maximise coverage.

This would be more straightforward to achieve, if the Scottish Government was to manage all contractual activity in Scotland, incorporating Openreach's Project Gigabit activity alongside R100. We continue to work with BDUK to progress this and with Openreach to determine how changes to the existing R100 build schedule could enable deployment of a whole area, 'once and done' approach that maximises gigabit coverage across rural Scotland.

Delivering on our objectives is, of course, also dependant on close collaboration with stakeholders across the country and, to that end, the Scottish Government continues to value those relationships and work closely with both Highland & Islands Enterprise and the Local Authorities across the Highlands and Islands region.

I trust that this is a helpful update for the Committee.

Digital Connectivity Division