Briefing for the Citizen Participation and Public Petitions Committee on PE2127: Develop a new Digital Connectivity Plan for the Highlands and Islands

The petitioner is calling on the Scottish Parliament to urge the Scottish Government to develop a new Digital Connectivity Plan for the Highlands and Islands that aims to:

- Address digital infrastructure gaps.
- Improve mobile internet coverage.
- Establish public-private partnerships.
- Support economic growth, education and healthcare.

Background

Digital connectivity in the Highlands and Islands

Ofcom's [Connected Nations Scotland Report 2024](#) provides an insight into digital connectivity across Scotland. 62% of residential properties, as of July 2024, have access to full-fibre networks in Scotland. This is an increase of nine percentage points (265,000 premises) from September 2023 to July 2024. 77% of Scottish households have gigabit-capable coverage (download speeds of 1+ Gbit/s), representing a 5% increase on 2023.

96% of Scottish residences have superfast coverage (download speeds of 30+ mbit/s). Scottish rural areas recorded a 4% increase in superfast coverage over the year; the largest increase of any geographic area in the UK. 0.5% (16,000) premises in Scotland cannot access decent broadband (at least 10Mbit/s download and 1 Mbit/s upload speeds).

However, rural Scotland is at a disadvantage when compared to urban settings and other UK countries. In Scotland, 99% of urban residencies have superfast coverage, whereas 83% of rural residences do. This is lower than rural areas in England (90%), Northern Ireland (95%) and Wales (87%).

Similarly, Scottish residencies in a rural setting have lower levels of gigabit capable and full fibre connectivity than urban settings. In Scotland, 85% of urban residencies have gigabit capable connections and 67% have full fibre. Whereas only 43% of rural residencies have gigabit capable connections and 42% have full fibre.

Some areas of the Highlands and Islands are most severely disadvantaged in this

regard. Whilst 89% of Midlothian and Glasgow City residencies have full fibre connection only 14% of Orkney and 11% of Shetland do.

[The report](#) found that programmes to enhance mobile connectivity in rural Scotland are making significant progress. At least one Mobile Network Operator (MNO) now covers 89% of landmass in Scotland, up 5% on 2023. All four MNOs cover 65% of Scotland, up 17% on 2023. Scotland continues to have the lowest 4G coverage across the nations, but it has recorded the highest growth in this measure.

11% of Scotland's landmass are "not spots" (no 4/5G coverage). This is higher than England (1%), Northern Ireland (2%) and Wales (5%). However, the amount of not spots in Scotland has gone down 5% between 2023 and 2024.

Scottish Government's policy approach to digital connectivity

The Scottish Government's 2021 Digital Strategy, titled: [A Changing Nation: How Scotland will Thrive in a Digital World](#) sets out government measures that aim to ensure that Scotland will fulfil its potential in a constantly evolving digital world.

Part one of this strategy focuses on people and place. It states: "Geography, background or ability should not be barriers to getting online and benefiting from digital technology." To this end, the strategy commits to improving rural 4G mobile coverage, delivering broadband coverage for all amongst other policy priorities.

Enhancing Scotland's digital infrastructure was also a cornerstone of the Scottish Government's 2022 10-year [National Strategy for Economic Transformation](#) (NSET).

Under the duty to prepare an Islands plan, in part 2 of the [Islands (Scotland) Act 2018,](#) improving digital connectivity was one of the outcomes sought for islands communities. The [National Islands Plan](#) itself was published in 2019. The plan states: "the implementation of the Plan will align with, and build on, existing digital strategies, specifically Scotland's overarching Digital Strategy."

The plan includes a list of strategic objectives on digital connectivity. For example, it calls on the UK Government to prioritise early investment in Scotland's islands as part of their plans for full fibre roll-out by 2025 - as well as calling on Ofcom to address the issues faced by island communities when designing telecoms regulation and policy.

Scottish Government's digital connectivity projects

In April 2024, the [Scottish Government announced](#) that a broadband connection milestone had been reached. They announced that more than one million faster broadband connections had been delivered to homes and businesses across Scotland, backed by £1 billion of publicly driven investment.

A key enabler of this was the £463 million Digital Scotland Superfast Broadband (DSSB) programme launched in 2014. This was funded in partnership with the UK

Government, Scottish Local Authorities, BT, the European Regional Development Fund (ERDF) and Highlands and Islands Enterprise (HIE). The build was completed in 2020 and connected more than 950,600 premises to fibre-based broadband which was over 150,00 more than originally anticipated.

Reaching 100% (R100) is a Scottish Government programme aimed at bringing faster broadband access to thousands of homes and businesses across the country. R100 is a programme funded primarily by the Scottish Government (£591m) with investment from the UK Government (£52m) and BT (£53m) who appointed Openreach to deliver the network. It is aimed at connecting around 113,000 properties in North, South and Central Scotland.

In October 2024:

- over 68,000 premises had been connected as a result of R100, including R100 contracts, R100 Scottish Broadband Voucher Schemes (SBVS) which offer a subsidy for premises not covered by R100 contracts, and additional premises which were not in the contracts but have been connected as a result of R100 contract build
- build had been completed for more than 15,000 homes and businesses in the R100 North contract area
- build was either completed or underway on 13 Scottish islands, with another 10 at the pre-build survey phase
- over 4,600 premises had used the Scottish Broadband Voucher Scheme
- R100 activity had taken place in all 32 Scottish local authorities

On 8 January 2024, the Economy and Fair Work Committee conducted budget scrutiny for the 2025-26 budget. The Deputy First Minister and Cabinet Secretary for Economy and Gaelic stated: "from 2025-26, we will also be delivering project gigabit in Scotland, with capital funding that is provided by the UK Government. That will complement the transformational work that has already been done by the R100 programme [...] Project gigabit is a £5 billion UK Government programme with a target to provide access to gigabit-capable broadband for at least 85 per cent of UK premises by 2025, and nationwide coverage by 2030."

The Scottish 4G Infill Programme (S4GI) is a £28.75 million initiative delivering 3G infrastructure and services in 55 mobile "not spots" in rural and island parts of Scotland. S4GI is being delivered in partnership with WHP Telecoms, Cellnex UK and the Scottish Futures Trust. A progress update on mast sites can be found here.

The Scottish Government has also funded the Scotland 5G centre, which is the national centre for accelerating the deployment and adoption of 5G connectivity in Scotland's Industry and public sector. This centre supports a regional network of 5G innovation hubs to facilitate widespread deployment of 5G.

Threats to connectivity

Upcoming changes to communication systems stress the need for digital connectivity. For example, on the 30 June 2025 the Radio Teleswitch service will be

shut down. This service uses radio signals to tell some electricity meters to switch between peak and off-peak rates.

Additionally, Integrated Services Digital Network (ISDN) and Public Switched Telephone Network (PSTN) are expected to be turned off by the end of January 2027. This is the switch from physical copper-based landlines to internet-based services across the UK. Following this, all phones will use Voice Over Internet Protocol technology.

Euan Ross, Senior Researcher, SPICe

21st January 2025