



Building Wales' digital future



Our contribution to the Welsh economy and its public services has never been more important. Before the pandemic, local authorities and businesses were already coming together to explore the use of technology in connecting people and supporting businesses and communities. But the realities of having to respond and adapt to Covid-19 has seen digital adoption accelerate at a rate of knots.

I'm proud of how we have responded to the challenges of the past few years, which have revealed to us the power of staying connected and the influence digital technology has on our everyday lives. Throughout the pandemic, we have endeavoured to unite Wales, connecting loved ones and ensuring the nation can work remotely, efficiently, and productively.

Wales is undergoing a digital transformation fuelled by the developments of 5G, and we're at the very heart of it. We're continuing to make ambitious,

long-term commitments to drive high performance 5G further and faster, with a goal to offer it in all parts of Wales and the UK by 2028. We strive to help bridge the digital divide, empower businesses, and connect the nation. Included in this document is an overview of our level of investment in Wales, highlighting the combined impact of our activities in the nation, contributing almost £1bn (£971m) to the Welsh economy and supporting more than 12,000 jobs across the country, and some of the ways we're innovating with our partners across the country.

Ultimately, digital transformation is key to revitalising communities feeling the impacts of the pandemic. We've already seen the data: digital investment could boost the UK economy by £230bn over the next 20 years. We are creating the digital base, the result of shared visions and collaboration that ensures a wide breadth of expertise and technology know-how. Strong

partnerships with a range of bodies will be essential to the evolution of public services in Wales.

Sam Toombs
Wales and South West Sales
Director
Enterprise



A digital strategy for Wales

Wales' refreshed digital strategy sets out a vision for a vibrant, inclusive, open, and outward-looking digital nation.

Technology is key in making this change happen. New technologies are joining the physical, digital, and biological worlds, affecting all disciplines, economies, and industries, and challenging the way we live and work.

At present, many organisations across Wales deploy digital solutions in isolation, using different components, with no thought given to wider regional and national synergies and opportunities. Moreover, they deliver their technology without human elements, new business models or commercial considerations.

Backed by our combined technology and capabilities, we can deliver our digital solutions (devices, data, skills, and applications) quickly, and scale it to your needs. It's future-proofed, underpinned by innovation, and can help in a range of fields.



Our economic impact in Wales

£971 million

The total GVA impact across Wales

4,660

The number of people we employ directly in Wales

12,200

The total number of full-time equivalent jobs we support across the nation

£340 million

The amount we spend with local suppliers based in the nation



Our economic impact on Welsh regions

Sub national impact

	BT Group employees and contractors			Total impact	
	Work in area	Resident in area	Employment	Output £million	GVA £million
South East Wales	2,830	2,980	9,160	£1,180	£704
South West Wales	992	1,060	1,110	£185	£106
North Wales	573	746	1,690	£228	£136
Mid Wales	213	267	217	£45	£26

Source: Hatch



Connecting Wales by investing in infrastructure

We're committed to helping communities and businesses in Wales thrive in the digital world. Here's how.

- We invest £3.7bn in our UK network every year, which means we can expand, improve our coverage, and connect more people and organisations.
- We've built our network specifically so that it never goes over 50% utilisation, and it's the only network to offer 99.999% availability. We haven't had an outage on our core network in over 13 years.
- We have access to the most extensive fibre network in Wales, which extends from Holyhead to Cardiff, and most places in between.
- EE's rollout of 5G is well underway in Wales, with the network already available in selected cities and towns including Cardiff, Newport, and Swansea. And we're still expanding.

The 5G technological revolution offers a significant opportunity for Wales. As a result of Openreach's Full Fibre programme, more than 400,000 premises across every single local authority area in Wales can already order full-fibre broadband, with thousands already enjoying ultra-reliable, ultrafast speeds.

- EE's 4G network has 84% geographical coverage in Wales and more 4G and 5G networks than any other provider, with further improvements to come. By June 2024, 123 rural locations across Wales will experience further upgrades to their 4G connectivity.
- Our EE network has been rated the UK's best network by RootMetrics seven years running, and best network for six years in a row by Mobile Choice.

Examples of our innovation in Wales

5G Wales Unlocked project

Wales is on the verge of transformation, fuelled by 5G.

But to truly understand how 5G applications can help transform the lives of consumers, businesses, and public services requires collaboration and co-innovation between the public and private sectors. That's across telecommunications companies, the government, the entire technology industry, and customers.

As the first UK mobile operator to launch 5G services in 2019, the EE 5G network is currently live in more than 160 locations across the UK. We're

the only operator with more than 55% 5G availability in any city today – including in Cardiff.

That's why we're pleased to join the 5G Wales Unlocked project as the official mobile network partner. It's part of our commitment to help understand the potential of this new technology to change the game in areas like transport, tourism, and farming in rural and semi-rural areas. This project offers opportunities to look at the potential of 5G in rural Wales, and how it is necessary, profitable, and vital for the growth of the nation.



Immersive classroom

The immersive classroom experience is a prime example of how 5G can enhance education in Wales.

Here, schools use innovative teaching methods, like projecting lesson content onto all four classroom walls to teach students beyond the traditional methods. Immersive classrooms are facilitating the development of crucial skills – critical thinking, problem solving, and

collaboration are just a few. And students with learning difficulties and those who struggle to engage in classroom activities are actively more involved in this environment.

The first site in Ebbw Vale will look to inspire students, facilitate learning, and connect the community. The immersive classroom experience is fast developing and has the potential to be rolled out in schools across Wales.



Supporting Wales' national critical infrastructure

Launched in 2007, the Public Sector Broadband Aggregation (PSBA) is a Welsh Government-funded initiative, powered and delivered by us. The project connects public sector organisations across Wales to a private and secure Wide Area Network (WAN).

PSBA uses innovative, cost-effective, resilient network services to enable public sector organisations in Wales to deliver efficient services to everyone. As of today, PSBA has connected more than 110 organisations across nearly 5,000 sites, including more than 560 GP surgeries.

LFFN rollout

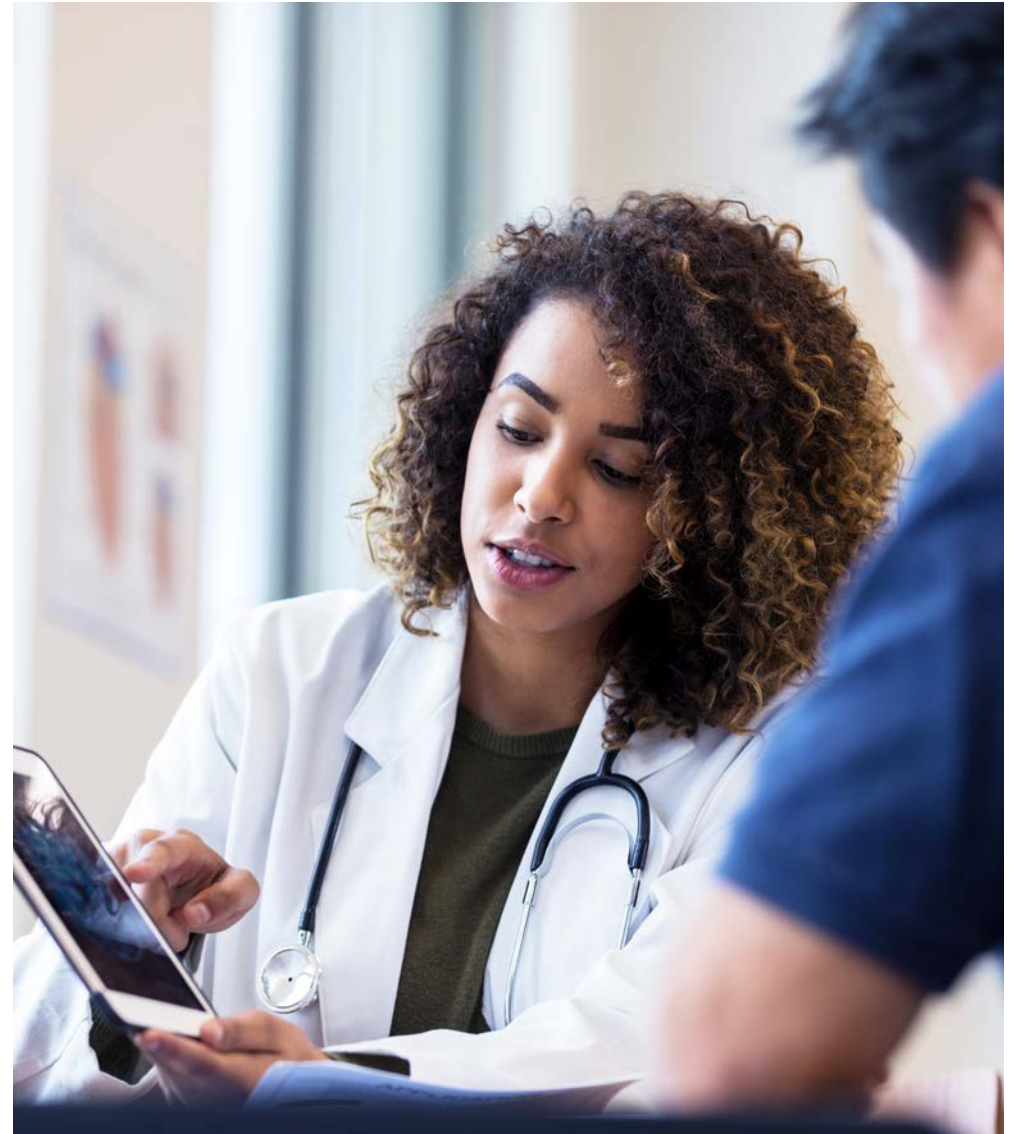
PSBA is improving connectivity at public sector sites across Wales through the UK Government's Local Full Fibre Network (LFFN) programme, powered by us.

The rollout of LFFN is benefitting authorities, businesses, and people alike. Vital healthcare services, such as the Cadwgan GP Surgery in Conwy, are benefitting from new ultrafast broadband speeds and better connectivity.

Prior to the LFFN installation, staff at the surgery were experiencing network issues that caused ongoing disruption and frustration. Dealing with the slow speeds that were available to the surgery resulted in wasted clinical and admin time, difficulties with remote working, and decreased productivity.

With the help of PSBA, our latest fibre broadband, and the LFFN programme, Cadwgan Surgery have been able to overcome these connectivity issues. The stable, fast, and reliable connection allows the surgery to use new, innovative software and apps, upload images from patients instantaneously, and get the most out of video consultations and remote systems.

The LFFN rollout helped the practice improve patient care and boost productivity throughout the Covid-19 pandemic.



Other ways we support the nation

Welsh rugby and football partnerships

We've been the principal sponsor of Welsh regions rugby since 2014. As part of our support and investment into club rugby, by 2023 we will have sponsored the four Welsh regions – Cardiff Rugby, Scarlets, Dragons, and Ospreys, for nine consecutive seasons. Our partnership has helped redefine the rugby landscape in Wales, as well as help give back to local communities.

The agreement between us and the Welsh rugby regions has inspired continued investment into community work and local projects across the nation, focusing on highlighting the importance of technology, innovation, and digital skills within communities across Wales.

We are also proud to be the exclusive lead partner of all the Welsh national men's, women's, development, and disability football teams until 2024. Our partnership with the FAW aims to connect the nation at every level of the game, particularly supporting grassroots development. This deal is integral to our ambition to be a national champion across the UK, as we continue to invest in supporting local businesses and communities.



Our manifesto for the future

In 2021 we published a manifesto for the next decade, setting out how we'll support responsible technology, become more inclusive, and do more on climate action. We want this digital future to benefit as many people as possible.

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February 2022