Digital Super Towns

vodafone

Unlocking Scotland's Digital Potential

WPI STRATEGY

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Contents

About this report

WPI Strategy would like to thank Vodafone for supporting the publication of this report. We would particularly like to thank those who took the time to discuss their specialist knowledge of digital issues to inform our analysis and recommendations. **The report expands on "Digital Super Towns: Unlocking the UK's digital potential", published in September 2017, which focussed on digital issues in the combined authorities of England. Two further reports – one focused on Digital Super Towns in Wales, and one developing the idea of Digital Enterprise Zones – are due to be published this year.**

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Steve was previously the Head of Economic and Social Policy at the think tank Policy Exchange, and published reports on increasing savings rates and reducing youth unemployment. Before Policy Exchange he worked at the Bank of England, where he helped manage the regulatory system that governs cash distribution in the UK. He has previously worked as an economist at the British Chambers of Commerce where he advised on tax, international trade and SME finance policy, and in Parliament, where he researched HM Treasury and Department for Work and Pensions legislation as it passed through the House of Commons.

About Vodafone

Vodafone UK's mission is to deploy technological innovation to unlock human potential. Vodafone is based in Glasgow, and there are over 1000 people working for its operations in Scotland. Vodafone is committed to rolling out good quality 4G coverage to the vast majority of the Scottish population. Vodafone has invested £1bn a year in the UK over the last two years and will invest a further £2bn over the next few years to continue to improve mobile coverage. Vodafone is adding new sites across Scotland as well as upgrading existing 2G and 3G services. Towns and cities are only part of the equation, and Vodafone is also working hard to bring connectivity to rural communities. Following recent improvements, customers on the Isle of Arran now benefit from 4G data speeds as well as crystal-clear calls.

Vodafone's investment in Scotland with CityFibre

Aberdeen is set to become a forerunner for digital transformation in Scotland with the announcement of a new Gigabit-capable full fibre broadband network under the Vodafone and CityFibre Fibre-to-the-Premises (FTTP) programme.

The Vodafone and CityFibre partnership will mean that Aberdeen becomes Scotland's first city in which nearly every home and business will have access to gigabit-speed broadband. It will also help the Scottish Government achieve their 'Reaching 100%' ambition of making Scotland one of the best connected places in Europe, unlocking its full potential in a digital world. CityFibre will invest at least £40 million of private funds in the city-wide roll-out.

Fibre optic cables are used for every stage of the connection, from the customer's home or business to the Internet. This means Vodafone will be able to provide customers with ultrafast and reliable broadband services capable of Gigabit speeds (1,000 Mbps). With no copper wire to slow the network down, the ultrafast connection will transform users' online experience. At present, just three per cent of UK premises have access to these superior standard connections.

Gigabit broadband services will help Aberdeen build on its credentials in innovation and as one of the best places to start a business. It will also transform consumers' daily lives through superior Internet access.

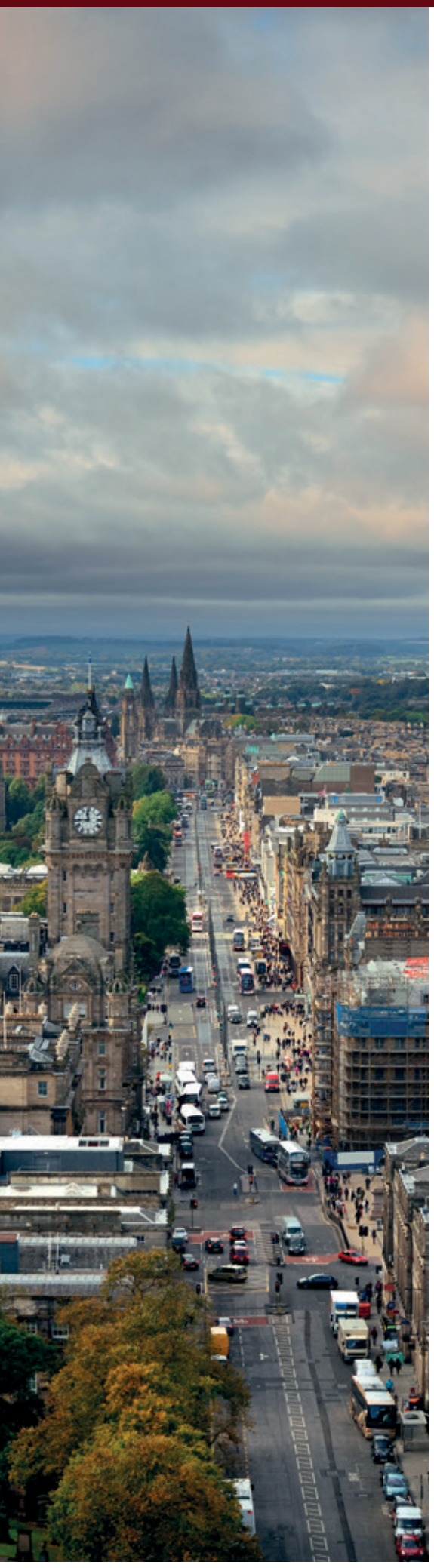
Aberdeen is the second UK location to be announced as part of a strategic partnership between Vodafone and CityFibre, unveiled in November last year. The partnership focuses on extending CityFibre's existing FTTP infrastructure to approximately 12 cities and reaching one million homes across the UK by 2021.

Key Messages

- The devolved powers provide a unique opportunity for Scotland to fulfil the digital potential of its major towns and cities, transforming them into "Digital Super Towns". Introducing "Digital Enterprise Zones" could create improved digital performance that will be the envy of the rest of the UK, helping to fulfil digital potential by serving two purposes:
  1. Creating test-beds for the adoption and use of next generation digital technology.
  2. Implementing policy designed to meet the specific digital needs and ambitions of towns and cities.
- Digital Enterprise Zones could enhance **digital economies** by:
  - Exploring how data can help Scotland's towns and cities better understand their digital economies.
  - Trialling digital marketing vouchers for Scottish SMEs with export potential.
- Digital Enterprise Zones could develop **digital skills** by:
  - Trialling improved collection of data on Scotland's digital skills.
  - Trialling initiatives that develop digital talent, such as work experience placements in digital businesses.
- Digital Enterprise Zones could support **digital infrastructure** by:
  - Incentivising investment in full fibre networks, which would encourage genuine competition.
  - Testing new approaches to ducts and poles and access to dark fibre to support the roll-out of full-fibre.
  - Reducing the burden of Business Rates and giving access to public sector land, building and street furniture.
- To maximise the effectiveness of Digital Enterprise Zones requires a better understanding of local digital attributes. An analysis for this report measures the performance of major towns and cities in Scotland on measures of the digital economy, digital skills and digital infrastructure. The results categorise each town or city as one of:
  - **Digital Pacesetters** – Digital high performers when compared to others within the scorecard.
  - **Digital Pillars** – Solid digital performers, but yet to reach the levels of a Digital Pacesetter.
  - **Digital Prospects** – A digital base to build on, but have yet to reach the levels of a Digital Pillar.
- The below table shows how Scotland's towns and cities are categorised by these definitions.

Town or City	Local Authority Area	Economy	Skills	Infrastructure
Aberdeen	Aberdeen City	Pillar	Pillar	Pacesetter
Ayr	South Ayrshire	Prospect	Prospect	Prospect
Coatbridge	North Lanarkshire	Pacesetter	Pillar	Pillar
Cumbernauld	North Lanarkshire	Pacesetter	Pacesetter	Pacesetter
Dundee	Dundee City	Prospect	Pillar	Pacesetter
Dunfermline	Fife	Pillar	Prospect	Pillar
East Kilbride	South Lanarkshire	Pillar	Pacesetter	Pillar
Edinburgh	Edinburgh City	Pacesetter	Pacesetter	Pacesetter
Glasgow	Glasgow City	Pacesetter	Pacesetter	Pacesetter
Greenock	Inverclyde	Pillar	Prospect	Prospect
Hamilton	South Lanarkshire	Pillar	Pacesetter	Pillar
Inverness	Highland	Prospect	Pillar	Prospect
Kilmarnock	East Ayrshire	Prospect	Prospect	Prospect
Kirkcaldy	Fife	Pacesetter	Prospect	Pillar
Livingston	West Lothian	Pacesetter	Pacesetter	Pillar
Paisley	Renfrewshire	Pillar	Pillar	Pacesetter
Perth	Perth and Kinross	Prospect	Pillar	Prospect

- As only around 3% of premises in the UK have full fibre connections, the data for digital infrastructure is largely based upon current copper based broadband infrastructure and 4G mobile networks. This means that towns or cities categorised as pacesetters now need to invest in gigabit capable infrastructure driven by full fibre and 5G if they are to be regarded as pacesetters in the future.



Introduction – Creating Digital Super Towns in Scotland

The devolved powers provide a unique opportunity for Scotland to fulfil the digital potential of its major towns and cities, transforming them into "Digital Super Towns". There are numerous real-life examples of what fulfilling this digital potential means. It is the employee in Edinburgh becoming more adept at using online systems. It is the small business in Dunfermline finding new markets by building a website. It is the graduate in Dundee designing computer games.

Plenty is already being done to help this potential be realised. Digital infrastructure is being built, digital skills are being taught and there are initiatives to boost digital economies. This activity is boosting Scotland's digital prospects – one forecast suggests that the Scottish digital sector will grow twice as fast as the wider Scottish economy in the coming years.[i]

But there is more that can be done. This report argues that "Digital Enterprise Zones" should be introduced to better meet the specific digital needs and ambitions of specific places. For example, a Digital Enterprise Zone could help a business park become a gigabit-capable commercial district that is home to a cluster of tech start-ups. Ultimately, the creation of Digital Enterprise Zones in Scotland could create improved digital performance that will be the envy of the rest of the UK.

In its Digital Strategy, the Scottish Government has already outlined a comprehensive and impressive vision to improve digital outcomes. Specific action includes:[ii]

- Launching a Digital Growth Fund to boost digital skills.
- Extending the Digital Boost programme, which aims to improve digital outcomes within businesses.
- Ensuring that every premise in Scotland can access broadband speeds of at least 30 Megabits per second by 2021.
- Expanding the number of school coding clubs.
- The creation of a Mobile Action Plan, setting out plans to tackle mobile not-spots and use publicly-owned assets for telecoms (the only plan of its type amongst UK and devolved governments).

Digital Enterprise Zones would be a tool for Scotland's policymakers to help deliver these initiatives, and to prepare for the adoption and use of future technologies. Innovations in artificial intelligence, robotics, autonomous vehicles and the Internet of Things will dramatically change our home lives, our working lives and our access to healthcare and education. For homes and businesses to take advantage of the opportunities that these innovations bring requires upgrades in digital connectivity – in other words, a "Gigabit Society" needs to be created if the true potential of digital is to be realised.

While this is all well and good in theory, to truly maximise the effectiveness of Digital Enterprise Zones ultimately requires a better understanding of the digital strengths and weaknesses of local areas. As a result, this report outlines a methodology for measuring the digital economy, digital skills and digital infrastructure of the major towns and cities in Scotland.

The remainder of this report is structured as follows:

- An outline of the concept of Digital Enterprise Zones, including policy suggestions for what they could include.
- The analysis of how digital potential varies across Scotland's major towns and cities.
- A conclusion on what this means for digital policy in Scotland.

The case for Digital Enterprise Zones in Scotland

What are Enterprise Zones?

The concept of Enterprise Zones – giving defined geographic areas extra policy tools to support economic activity – is not new. Throughout the 1980s and early 1990s almost 40 areas around the UK were designated as Enterprise Zones to support regeneration. In Scotland, Enterprise Zones were established in Clydebank, Invergordon, Tayside, Inverclyde and Lanarkshire, and offered investment incentives such as simplified planning regimes and exemptions from training levies.[iii]

The idea has been revived in recent years, with the Scottish Government assigning 15 sites as "Enterprise Areas" – the change in terminology reflecting a focus on sectors (such as life sciences and renewables) rather than a focus on place. Enterprise Areas applied business rate discounts, enhanced capital allowances, international marketing and access to superfast broadband.[iv]

Enterprise Zones or Enterprise Areas have successfully applied policy differentiation in a certain locality, with the intention of creating economic activity.

What would Digital Enterprise Zones look like?

Digital Enterprise Zones would take the concept of Enterprise Zones and Enterprise Areas and apply it to enhancing digital economies, digital skills and digital infrastructure. They would serve two purposes:

- **To create test-beds for the adoption and use of next generation digital technology**. Whether this is creating supportive local conditions for a full fibre, test beds for 5G or innovations such as connected or autonomous vehicles or IoT, Digital Enterprise Zones can be used to help understand how advancements in digital technology can be implemented. This could include working with innovative companies such as CityFibre, which is rolling out future-proofed, full fibre infrastructure.
- **To implement policy designed to meet the digital needs of individual towns and cities**. While identifying the specific digital needs and ambitions of each town and city is not straightforward, addressing their local digital needs and ambitions would drive productivity and economic growth.

Digital Enterprise Zones could also: act as a catalyst to spread the implementation of successful digital initiatives across more city regions (see box, below, for examples); and, be the framework to direct government funding for digital initiatives.

Examples of local digital initiatives in Scotland

- The **Dundee City Council** has set out a digital strategy. It includes the development of code clubs within schools, exploring ways that big data analytics can be used to produce innovative services and creating digital innovation hubs.
- The **Digital Office for Scottish Local Government** was set up in 2016. Its mission is to be a centre of excellence in data, technology and digital, and to help councils to create high-quality digital services. The aim is for all councils to be Digital Businesses by 2020.
- Like many councils across Scotland, **Fife Council** had an ageing public space CCTV system that was in need of modernisation. Fife Council used Vodafone's help to understand how IoT technologies could modernise and reduce operating costs. Part of the solution was rolling out Vodafone Global IoT sims to each CCTV site, digitally transforming this into a Smart CCTV camera. The project will deliver a cost saving of 60%.

Sources for the above can be found in the endnotes[v]

Policy ideas for Digital Enterprise Zones

The following are suggestions for policies that Digital Enterprise Zones could include. Scottish policymakers do not need new powers to implement them, with education, trade promotion, planning and business rates being devolved matters (and recommendations concerning data do not need devolved powers in order to be tested).

Enhancing digital economies

- **Explore how data can be used to help Scotland's towns and cities better understand their digital economies.** Data gathered by UK government agencies – such as Companies House or HMRC – may offer insights into a locality's digital economy. Policymakers should be armed with all possible data as they design and target digital policy.
- **Trial digital marketing vouchers for SMEs in Scotland with export potential.** Export advice suggests that businesses should internationalise their websites by using translation services and by using colours, images and branding that are culturally appropriate. Scotland's Trade and Investment Strategy outlines how businesses are supported in getting online and opening up new markets. Digital Enterprise Zones could build on this by trialling a voucher scheme for SMEs to procure digital marketing services to use in selected foreign markets.

Enhancing digital skills

- **Trial how to improve the collection of data on Scotland's digital skills within a locality.** Of all the issues related to digital, data on levels of digital skills is scarce. On this basis, the Scottish Government should conduct an audit and collection of digital skills data within a Digital Enterprise Zone. This could be used as a model for data collection on digital skills across the entirety of Scotland.
- **Trial initiatives that will help the development of digital talent.** The Scottish Government should look at how its Digital Growth Fund can be used to support work experience placements in digital businesses, allowing secondary school children the opportunity to see the practical reality of a digital career. This could include covering the cost of travel for students to undertake the placement. Vodafone offers an extensive work experience programme giving young people opportunities in the workplace.

Enhancing digital infrastructure

- **Incentivise investment in full fibre networks.** Rewarding investment in full fibre gigabit capable networks would encourage genuine competition. Investment in full fibre networks must not be undermined by incumbent providers using investment in existing copper-based infrastructure to undermine the investment case for full fibre.
- **Test new approaches to ducts and poles and access to dark fibre in Digital Enterprise Zones to support the roll-out of full-fibre.** The rapid rollout of FTTP networks is dependent on the ability to access existing ducts and poles. This is important for reasons beyond fixed infrastructure. Full FTTP fibre is crucial for the delivery of widespread mobile internet coverage and capacity – mobile operators' masts need to be connected to fibre networks in order to meet the current and future demand for mobile services.
- **Reduce the burden of Business Rates and give access to public sector land, building and street furniture.** The Scottish Government's digital strategy has set out how it wants to use the business rates system to incentivise the commercial delivery of new fibre and mobile infrastructure, indeed a successful trial of such a scheme has already taken place in the Cairngorm area. Digital Enterprise Zones could provide rate relief on all digital infrastructure investments. Alongside this, freeing up access to public sector land, buildings and street furniture would help with infrastructure provision.

Measuring digital potential

Towns and cities can only fulfil their digital potential if they can better understand this potential. We created a scorecard of digital potential for Scotland's towns and cities, analysing their performance on indicators related to the digital economy, digital skills and digital infrastructure. The methodology used to do this is by no means perfect – high quality data on local digital metrics is few and far between. Nevertheless, the scorecard illustrates how digital potential varies across Scotland's towns and cities with a population greater than 40,000 people.

The scorecard

The scorecard focuses on data relating to three areas:

1. **Digital economy**. The digital economy means different things to different people. Some think of it as the tech start-ups that disrupt traditional business models. Some think of it as global companies – such as Apple and Google – that have revolutionised how people consume things like music and information.[vi] Some think of it as the digital resources – from websites to cloud storage – that have changed how businesses operate.[vii] Some think of it as the innovations that will be part of the future economy, such as Artificial Intelligence and the Internet of Things. With such a range of perspectives, estimates of the digital economy's size have inevitably varied.[viii]

    - **Indicators of generic economic health** – Measures of labour productivity and local labour market health are included.
    - **Indicators of digital economy estimates** – A measure of local businesses within digital industries and a measure of businesses that utilise a high proportion of digitally skilled workers are included.[ix]

2. **Digital skills**. It is a widely held view that digital skills should be taken as seriously as numeracy and literacy in the education system.[x] As a result, many organisations across government, industry and the voluntary sector are trying to teach and develop digital skills. This activity tends to focus on distinct groups. For example, a variety of research has shown that those in lower social grades, the elderly, the unemployed and the disabled have less complete digital skill sets.[xi] To reflect some of these considerations, the skills indicators included in the scorecard of digital potential are:

    - **Indicators of future digital skills** – A local area's schools' system will affect a local area's future digital capability. Measures include attainment in maths and English, as numeracy and literacy are the foundation of the digital economy.[xii]
    - **Indicators of existing skills deficiencies** – Lower socio-economic groups tend to have lower levels of basic digital skills. Therefore, the proportion of an area's population in lower social grades is used as a proxy for digital skills levels.

3. **Digital Infrastructure**. Many regard digital infrastructure as being as important as the utilities of water, gas and electric. Yet, keeping digital infrastructure up to date is a challenge – as the current generation is rolled out, the implementation of the next needs to be considered.[xiii] For instance, some localities currently rely upon 20th century copper telephone networks for broadband infrastructure; but copper networks are not fit to support the next wave of technological innovations, driven by the 4th Industrial Revolution.

Unlike the topics of the digital economy and digital skills, there is good data available to measure the quality and coverage of digital infrastructure. The indicators used in the scorecard of digital potential are:

- **Indicators of mobile infrastructure quality** – The measures include 4G coverage under different scenarios, such as outdoor and indoor coverage based upon premises and geographic locations as well as the coverage on roads.
- **Indicators of broadband infrastructure quality** – The measures include the proportion of premises that have superfast broadband availability and next generation access. Measures of average upload and average download speeds are also included.

Scorecard results – Pacesetters, Pillars and Prospects

The scorecard of digital potential presents three categories of digital potential:

Digital Pacesetters

Digital high performers when compared to others within the scorecard

Digital Pillars

Solid digital performers, but have not yet reached the performance levels of Digital Pacesetters

Digital Prospects

A digital base on which to build, but have not yet reached the performance levels of Digital Pillars

It is important to emphasise that for whichever of the above categories a town or city falls into, it will have digital potential, and it is possible to translate this potential into productivity gains. But that is all it is – a possibility. For example, a town or city's school students may be likely to acquire high levels of digital skills; encouraging those students to remain in that town or city after they have finished school could be a barrier to digital potential being fulfilled. It is also important to emphasise that as only around 3% of premises in the UK have full fibre connections, the data for digital infrastructure is largely based upon current copper based broadband infrastructure and 4G mobile networks. This means that towns or cities categorised as pacesetters now need to invest in gigabit capable infrastructure driven by full fibre and 5G if they are to be regarded as pacesetters in the future.

The table below presents how Scotland's towns and cities are categorised as Pacesetters, Pillars and Prospects on measures of the Digital Economy, Digital Skills and Digital Infrastructure.

Town or City	Local Authority Area	Economy	Skills	Infrastructure
Aberdeen	Aberdeen City	Pillar	Pillar	Pacesetter
Ayr	South Ayrshire	Prospect	Prospect	Prospect
Coatbridge	North Lanarkshire	Pacesetter	Pillar	Pillar
Cumbernauld	North Lanarkshire	Pacesetter	Pacesetter	Pacesetter
Dundee	Dundee City	Prospect	Pillar	Pacesetter
Dunfermline	Fife	Pillar	Prospect	Pillar
East Kilbride	South Lanarkshire	Pillar	Pacesetter	Pillar
Edinburgh	Edinburgh City	Pacesetter	Pacesetter	Pacesetter
Glasgow	Glasgow City	Pacesetter	Pacesetter	Pacesetter
Greenock	Inverclyde	Pillar	Prospect	Prospect
Hamilton	South Lanarkshire	Pillar	Pacesetter	Pillar
Inverness	Highland	Prospect	Pillar	Prospect
Kilmarnock	East Ayrshire	Prospect	Prospect	Prospect
Kirkcaldy	Fife	Pacesetter	Prospect	Pillar
Livingston	West Lothian	Pacesetter	Pacesetter	Pillar
Paisley	Renfrewshire	Pillar	Pillar	Pacesetter
Perth	Perth and Kinross	Prospect	Pillar	Prospect

Conclusion

This report argues that the creation of Digital Enterprise Zones is an opportunity to give towns and cities across Scotland the tools to help fulfil their digital potential. Regardless of whether policymakers agree with – or in some cases, can afford – the specific ideas for Digital Enterprise Zones that have been outlined, the basic concept remains sound. Test-beds will be needed to understand how to roll-out and adopt advancements in digital technology. Better data is needed to understand the digital needs of each locality.

Should the idea of Digital Enterprise Zones be adopted, there should be a long-term commitment to them. While there are some "off-the-shelf" policies that can enhance the digital outcomes of Scotland's towns and cities in the short-term, others will take longer to have an effect. For example, digital marketing vouchers could theoretically result in overseas sales quite quickly; upgrading infrastructure after offering incentives may take much longer. Only with a long-term approach can "Digital Super Towns" – places which systematically identify and attempt to fulfil their digital potential – become a reality.

Annex I
Scorecard Methodology

The process for developing the rankings within the scorecard is as follows:

1. The three scorecard categories have been chosen for analysis for two reasons. The first is that they are the areas of digital most discussed in the context of public policy. The second is that they can all be measured in some way using publicly available data at a local level.
2. A list of desirable indicators under the headings of Digital Economy, Digital Skills and Digital Infrastructure was drawn up, after a review of previous research on the subject and after conversations with those involved with digital productivity.
3. Data for all the identified indicators was collected for all local authority areas where possible (see table, below, for a list of indicators). This data was then taken to create a distribution of performance on each indicator. For example, this could have been putting the employment rates of all local authorities order from highest to lowest. This distribution was then split into quartiles.
4. The relevant local authority data from each combined authority area was then identified.
5. Each local authority was assigned a score based upon its position within the distribution. The higher up the distribution the local authority was, the higher the score on the indicator.
6. Following this, towns or cities were identified within each local authority. Only towns or cities with a population of more than 40,000 were included in the analysis.
7. Following this, where there was more than one town in a local authority with a population of greater than 40,000, post-code level data was used to establish which town had the better digital infrastructure and were included in the rankings (this means that there is only one satellite town or city included in the rankings from any local authority).
8. The towns and cities were ranked according to an average score across indicators. When the combined scores were analysed, indicators were weighted in each category to give them equal billing.
9. The categorisation of Pacesetters, Pillars and Prospects was achieved by ranking each town or city in order of their scores, creating a league table of digital potential. This league table was then split into thirds to assign towns and cities to each category.

Indicators used for each business

Digital Economy	• Labour productivity • Employment • Industries with high levels of digital employment intensity • Digital Business Stock
Digital Skills	• Numeracy • Literacy • Socio-Economic Group
Digital Infrastructure	• 4G coverage indoor/outdoor premises, geographic (outdoor) and roads • Superfast Broadband availability • Next generation access (FTTC, FTTP etc.) • Average download speed • Average upload speed

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iii Scottish Parliament Information Centre, Enterprise Areas Briefing, Feb 2012, http://www.parliament.scot/ResearchBriefingsAndFactsheets/Factsheets/SB_12-16.pdf

iv Enterprise Zones Parliamentary Brief, March 2016.

v See example for Dundee here, the Digital Office here and Fife Council here.

vi NIESR, 2015, "The UK's Digital Economy", http://www.niesr.ac.uk/sites/default/files/publications/The%20UK's%20Digital%20Economy.pdf

vii UK Digital Strategy, March 2017, https://www.gov.uk/government/publications/uk-digital-strategy/4-the-wider-economy-helping-every-british-business-become-a-digital-business

viii For example, BCG estimated that the "internet economy" contributed £174bn to the economy in 2014, whereas The Economist stated the "digital sector" contributed £114bn to the economy in 2014. In another, the NIESR's and ONS's estimates of digital businesses varied from 188,000 to 270,000 respectively.

ix Nesta, September 2015, "Dynamic Mapping of the Information Economy Industries", https://www.nesta.org.uk/sites/default/files/dynamic_mapping_of_the_information_economy_industries.pdf

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xii House of Lords Select Committee on Digital Skills, February 2015, "Make or Break: The UK's Digital Future", https://www.publications.parliament.uk/pa/ld201415/ldselect/lddigital/111/111.pdf

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