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openreach

Business Briefing

18 November 2021

A woman with short blonde hair, wearing a blue zip-up jacket and blue cargo pants, is kneeling on the floor. She is smiling and looking towards the camera while plugging a green cable into a white wall outlet. The outlet is mounted on a white wall next to a green door. The door has a silver handle and a small window. A blue bag is on the floor next to her.

01

Openreach today

Clive Selley
CEO, Openreach

Welcome and Agenda

01	Openreach today	5 – 13
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Doing what we said we'd do

The key objectives we set out in 2019

- **Improve service** for customers
- Build **close, collaborative relationships** with our Communications Provider (CP) customers
- Move our customer base **from ADSL to VDSL** Superfast broadband
- Improve the **productivity and efficiency** of our engineering functions
- Translate service, productivity and efficiency gains into **stronger financial results**
- Rebuild this business of ours on a **full fibre platform**
- **Re-skill our workforce** for a full fibre world

Despite Covid-19, service levels have improved significantly on the Copper, Ethernet and FTTP platforms

Copper/VDSL On Time Provision

93.90% 95.50%

Sep-19

Sep-21

Ethernet Certainty

81.30% 86.80%

Sep-19

Sep-21



Exceeding all Ofcom regulated quality of service standards



Ethernet delivery time reduced by 20% since 2018

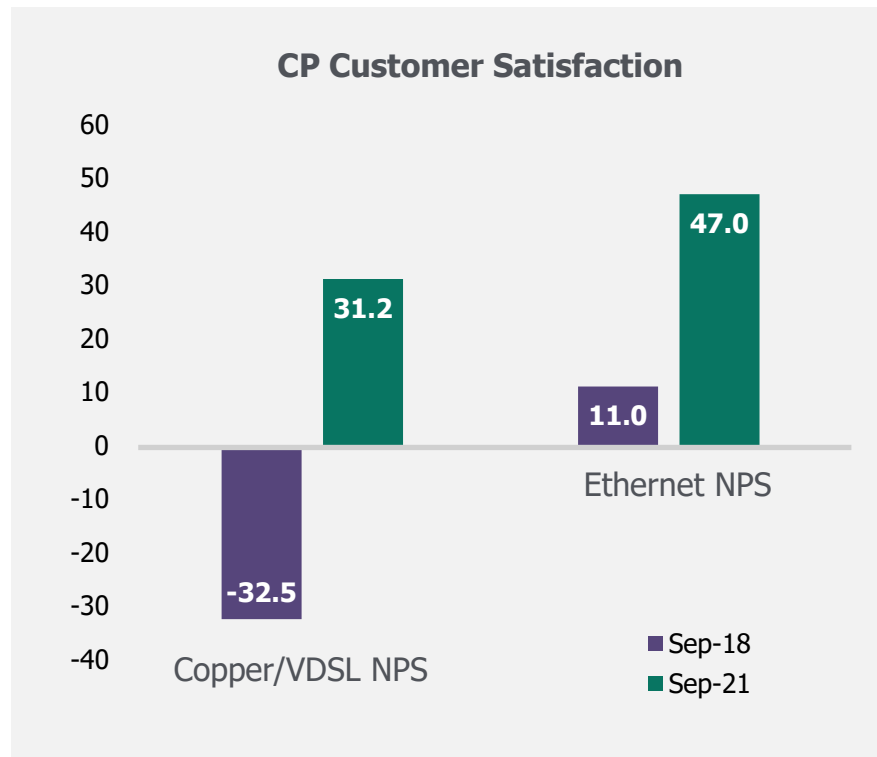


Delivered best ever Copper On Time Repair in H1 21/22



Migration to FTTP will enable even better service

Relationships with CP customers and trust from householders and business owners across the UK has risen steadily



Better service

Delivering significantly better service, and kept the UK connected during Covid-19 lockdowns



FTTP deal

Equinix, the 10 year FTTP deal to drive rapid adoption, designed with our CP customers

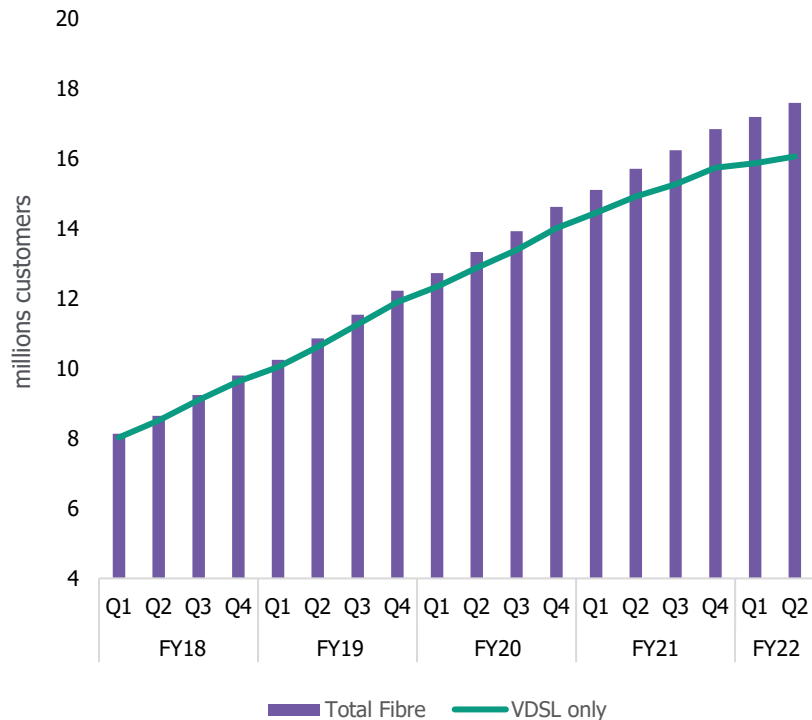


Co-provisioning with CP customers

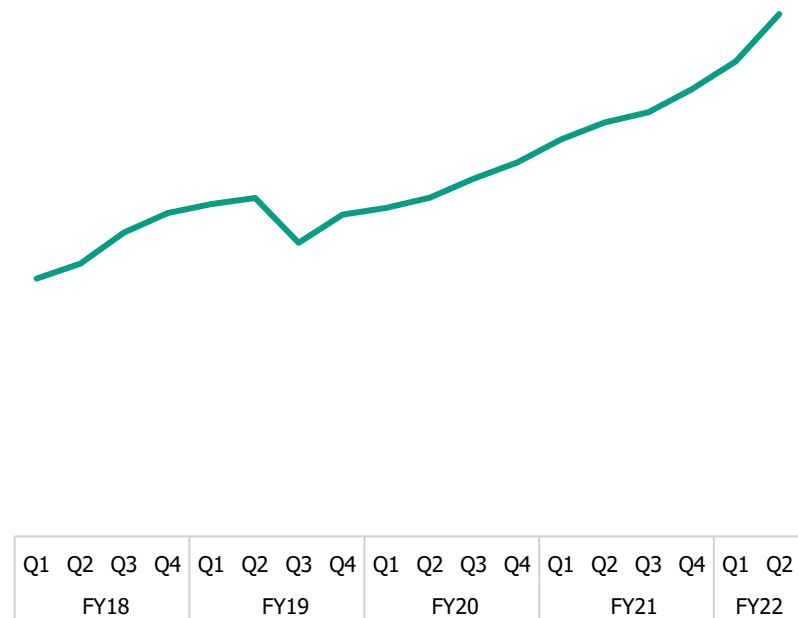
Sky engineers to complete in-home part of Openreach FTTP installations

The 2018 volume deal has driven rapid adoption of the VDSL platform

Fibre¹ Base



Broadband² ARPU

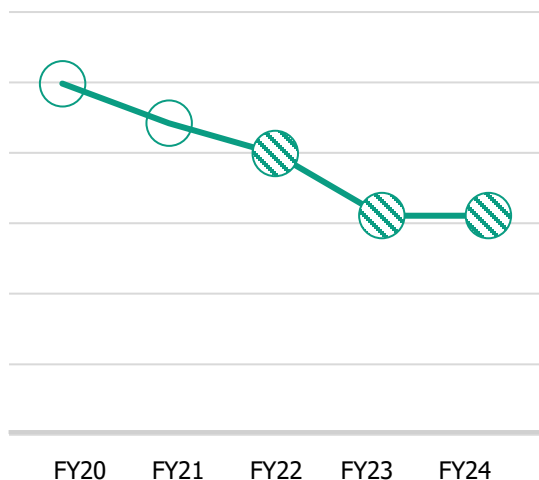


1. Fibre includes VDSL, Gfast and FTTP platforms
2. Total Rental Revenue (WLR, LLU and NGA) / Physical Lines

In the last two years we've eliminated £385m of annualised failure costs, further improvements to come

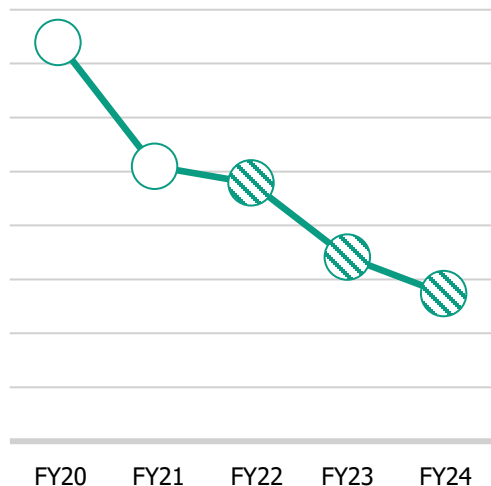
20% reduction in FTTP provision cost since 19/20

FTTP Provision Unit Cost



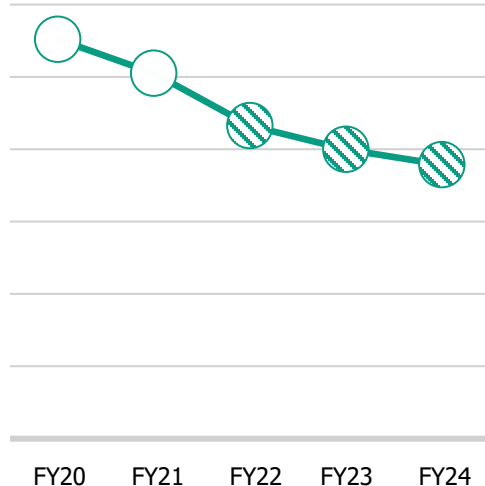
6% reduction in cost per line since 19/20

Cost per Physical Line¹

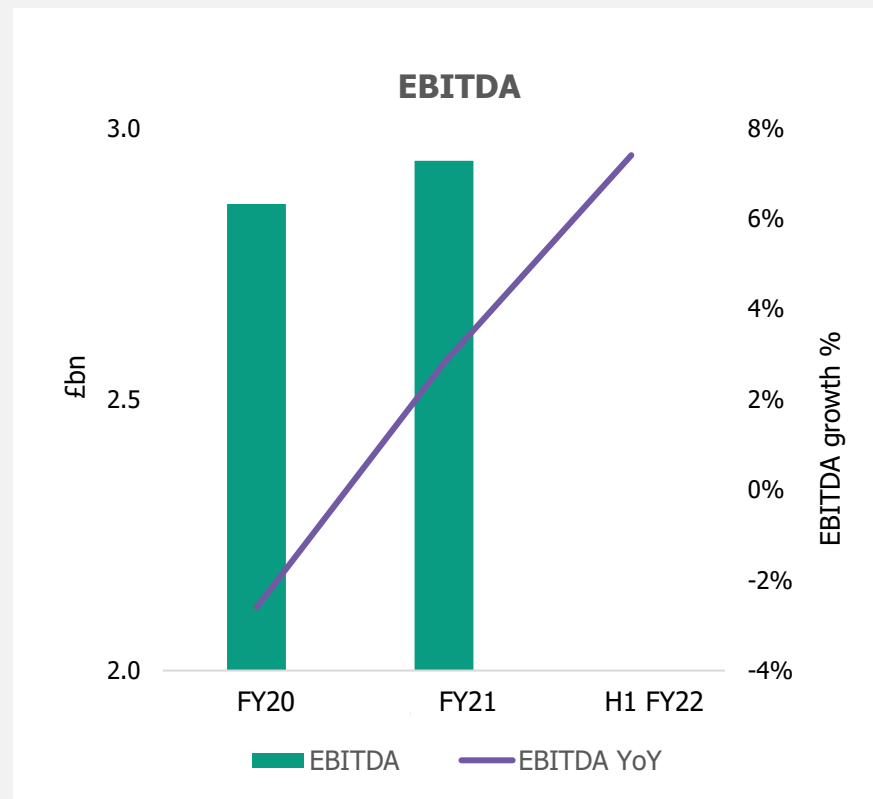
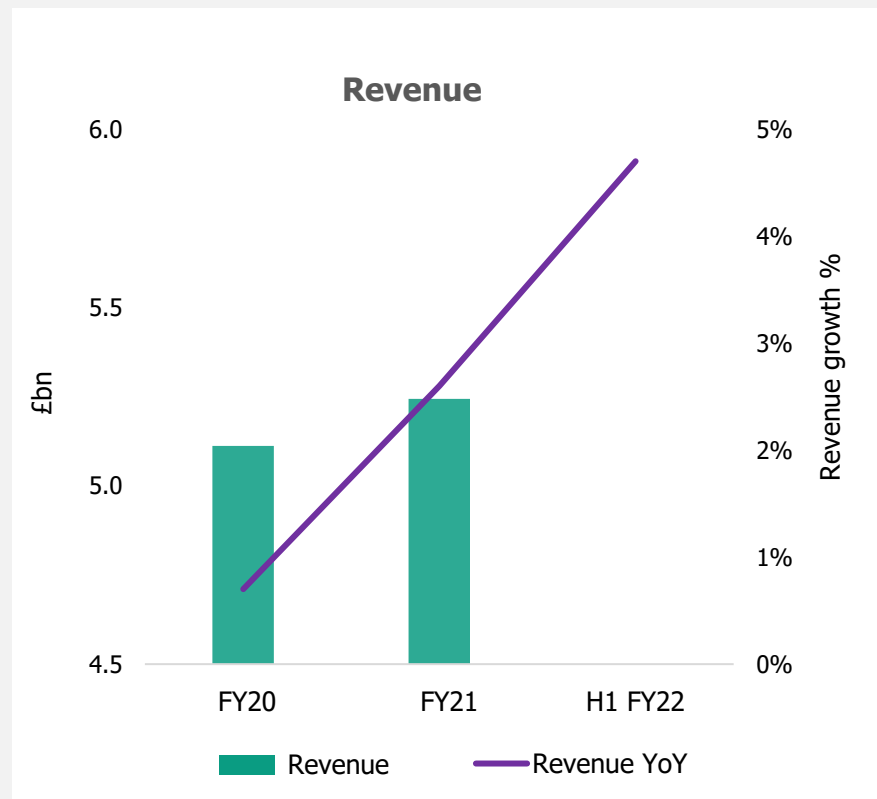


22% reduction in ethernet provision costs since 19/20

Ethernet Unit Costs

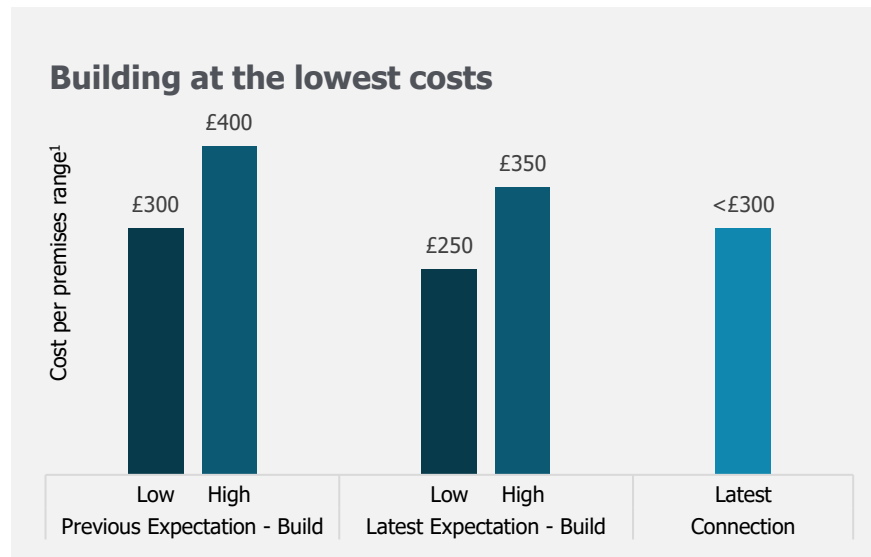
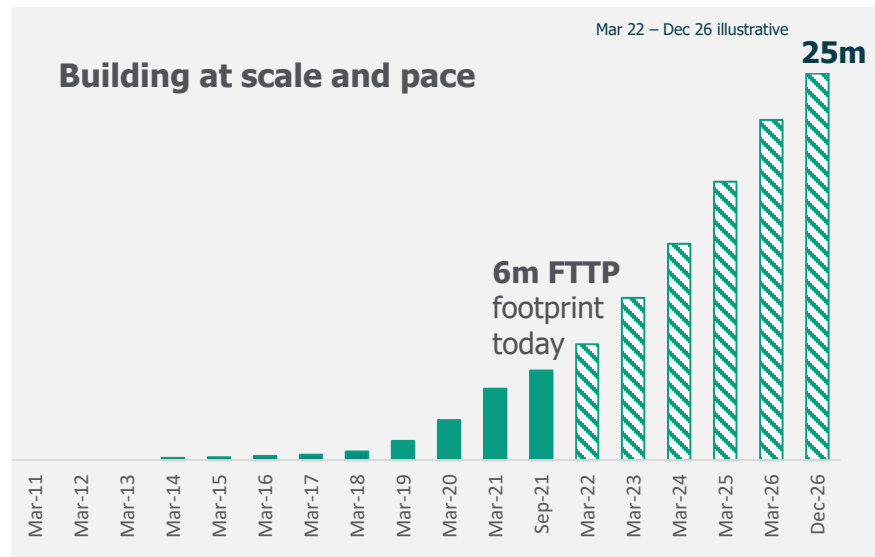


We are on track for a third year of revenue growth and second year of EBITDA growth



Phase one of the big fibre build is behind us

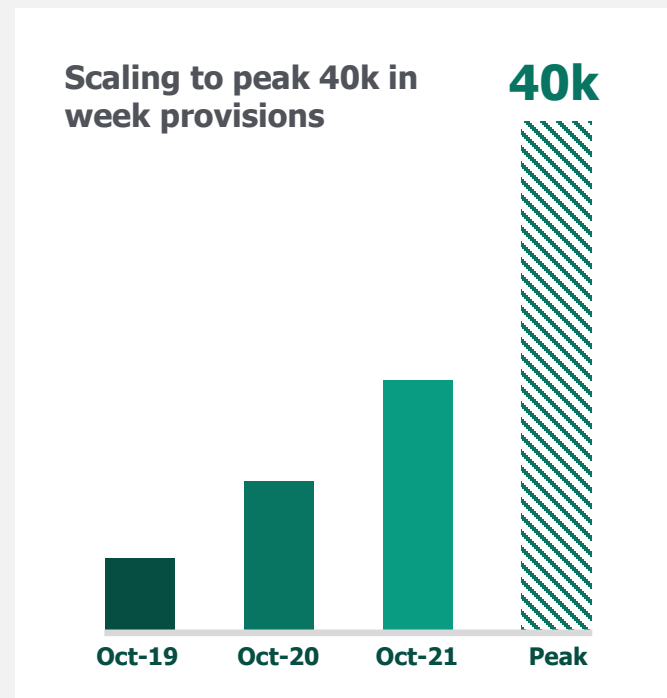
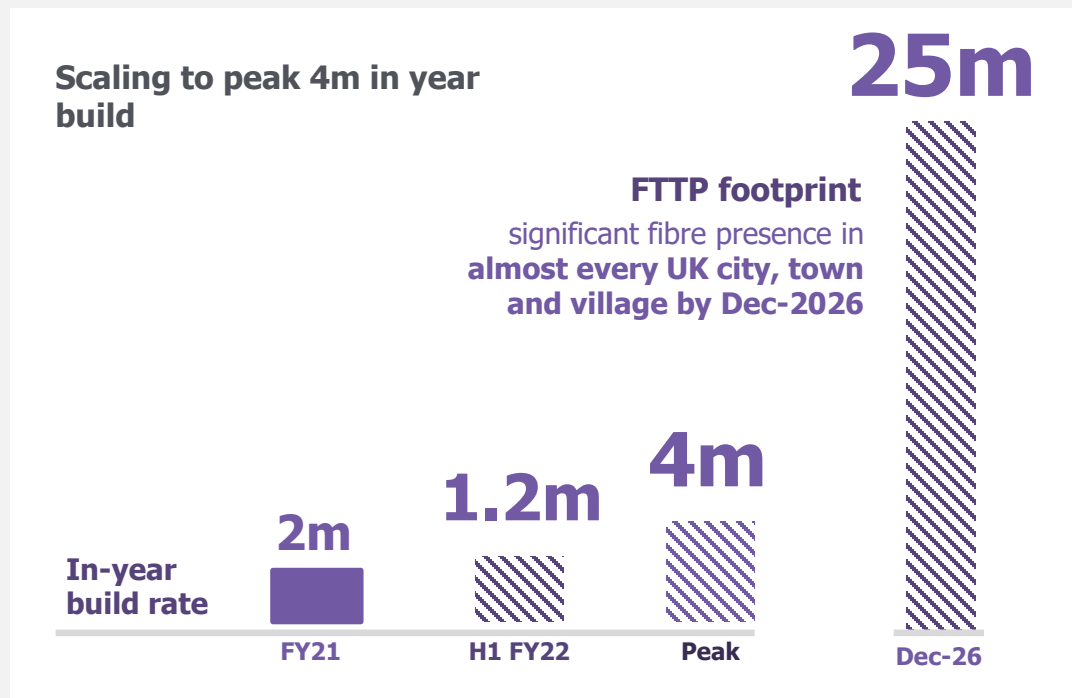
We're market leaders on pace, cost and quality – in all geo types



15,000+ FTTP build and provision engineers today

1,000 engineers per quarter recruitment rate

Phase two of the big fibre build is underway and will see us deliver a peak 4m in-year FTTP build and large-scale FTTP provisioning



Our differentiator is our huge direct labour workforce and ability to recruit or dual-skill 5,000 engineers to fibre each year.



- 01 Majority of customer base on VDSL**, which meets the needs of most consumers today
- 02 Building at an unrivalled pace and cost. Will be almost everywhere by Dec-2026**
- 03 Selling and provisioning in higher volumes** every week, **Equinox deal will drive rapid adoption**
- 04 We are transforming, simplifying and taking cost out – full fibre will super-charge cost reductions**
- 05 We will continue to command the strongest economics**, as we are ahead on:
 - a. People and skills**, and
 - b. Technical innovations**

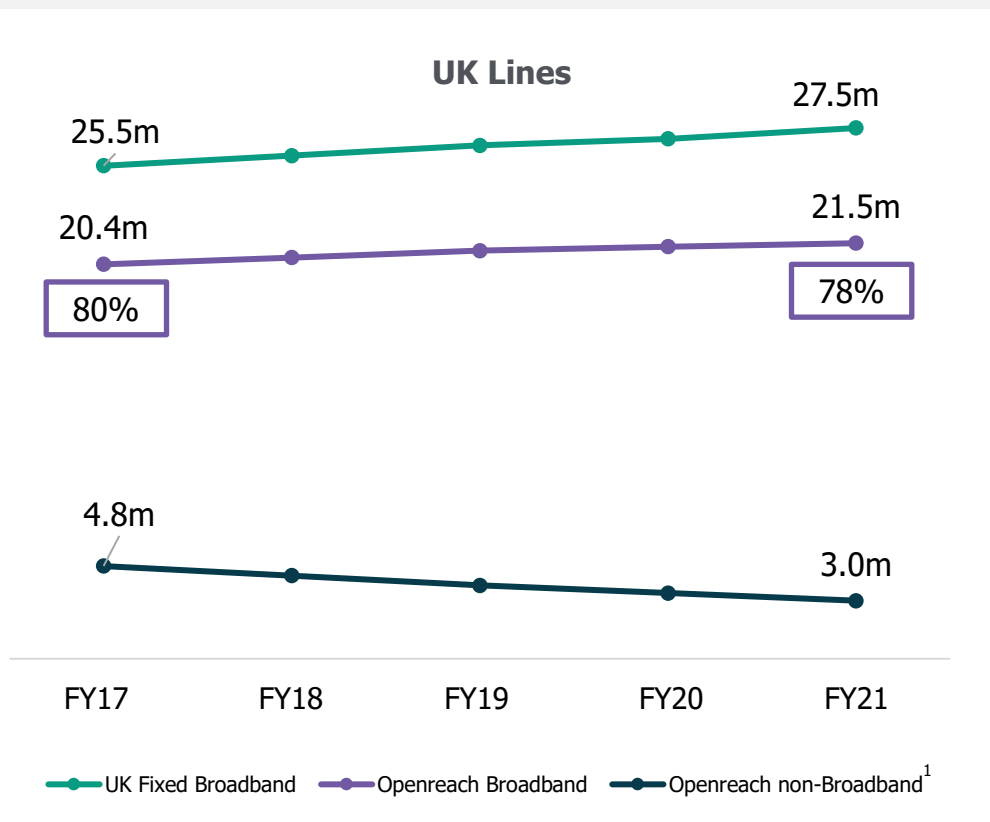
A group of six young people are in a modern living room. One person is lying on a large grey rug on the floor, holding a game controller. Another person is sitting on the floor next to them, also holding a controller. In the background, three more people are sitting on a green sofa, some wearing headphones and looking at their phones or laptops. A fourth person is sitting on a grey armchair to the right, also wearing headphones and holding a phone. The room has large windows, a potted plant, and a small wooden table with a laptop and a bowl of snacks.

02

Market context
and strategy

Richard Allwood
Chief Strategy Officer

The broadband market is growing



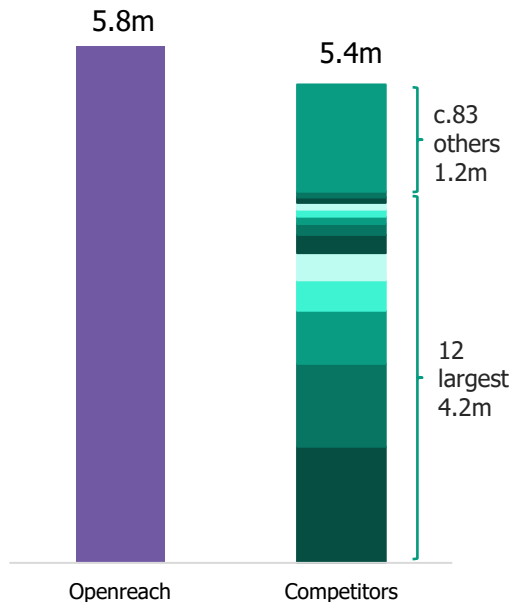
	20/21 movement
Market growth	440
Competitive losses	(260)
Openreach broadband net adds	180
Multi-line consolidation Migration to broadband	(430)
Openreach physical line net adds¹	(250)

1. Some CPs pay us for both a FTTP and WLR lines at the same premises. We consider this to be a temporary solution whilst CPs optimise their IP voice services and expect the WLR at these premises to be terminated and so exclude it from the underlying total shown

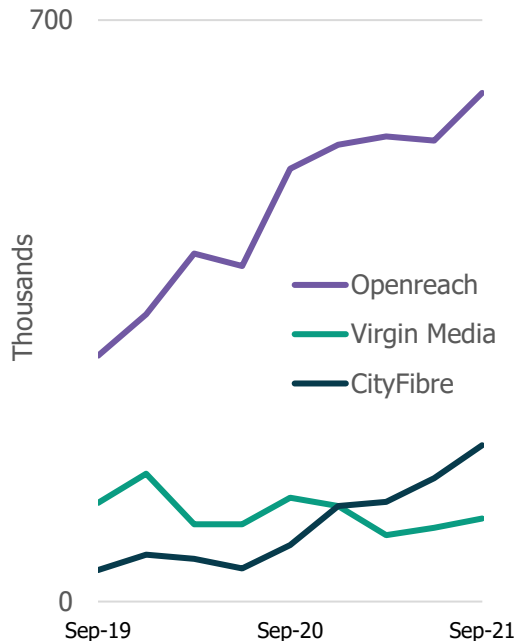
We're well ahead of the competition

FTTP premises passed Openreach and Competitors

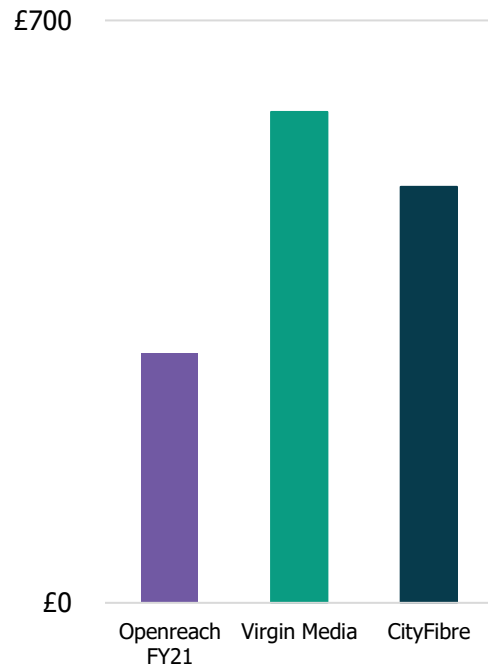
Sep 2021



Quarterly build rate (premises passed)



Average cost per premises passed (comparable basis)



Regulation and public policy support scale fibre build



Regulation

- No surprises: framework set for at least 10 years
- Indexation; premium for FTTP with pricing freedom above anchor
- Physical Infrastructure Access to support entry
- Changes to switching framework



Public policy

- Subsidy for non-commercial areas
- Progress on barrier busting
- Corporation tax super deduction



Strategy: key themes

Move at pace to:

- I** Build nationwide at lowest unit costs
- II** Migrate all our customers brilliantly at competitive prices
- III** Simplify and reduce costs



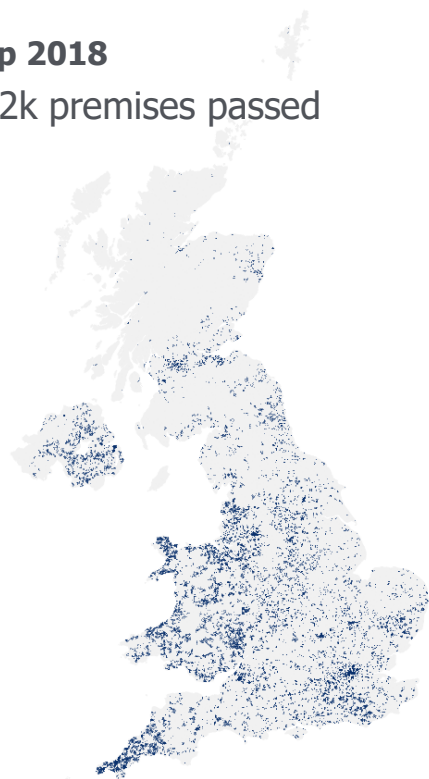
Transformed economics

Nationwide build progressing at pace

Postcodes with access to Openreach FTTP

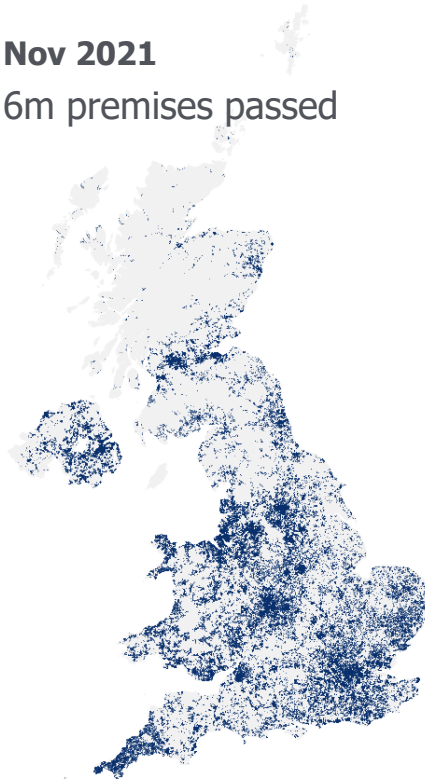
Sep 2018

682k premises passed



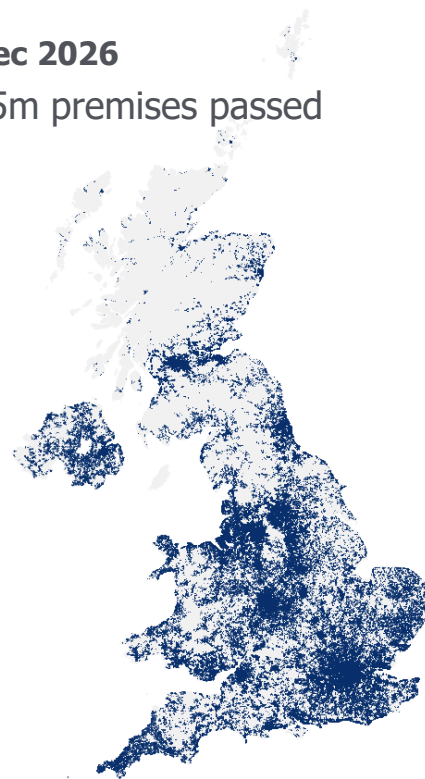
Nov 2021

6m premises passed



Dec 2026

25m premises passed



We're ramping the pace of migration to FTTP

The enablers of rapid migration are in place

Competitive pricing



Quality build and provision



A proven wholesale model



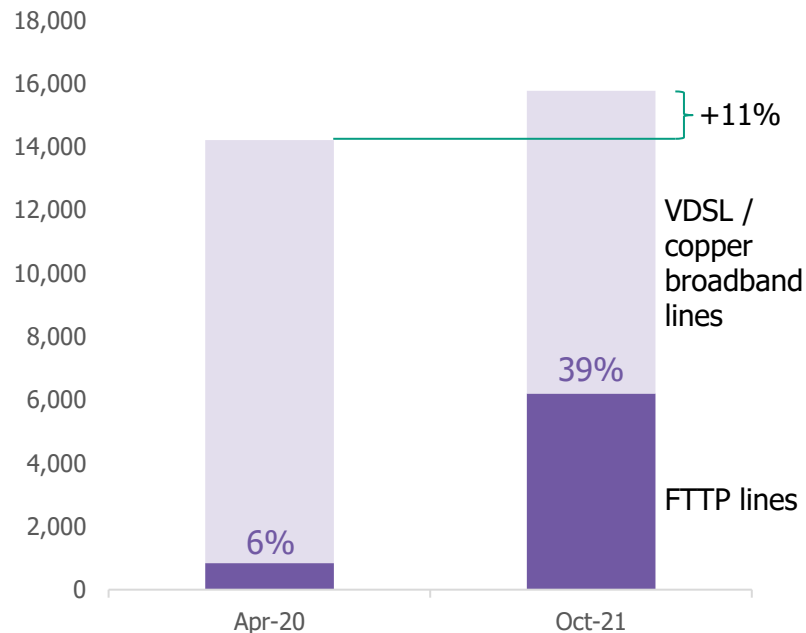
Copper stop sell



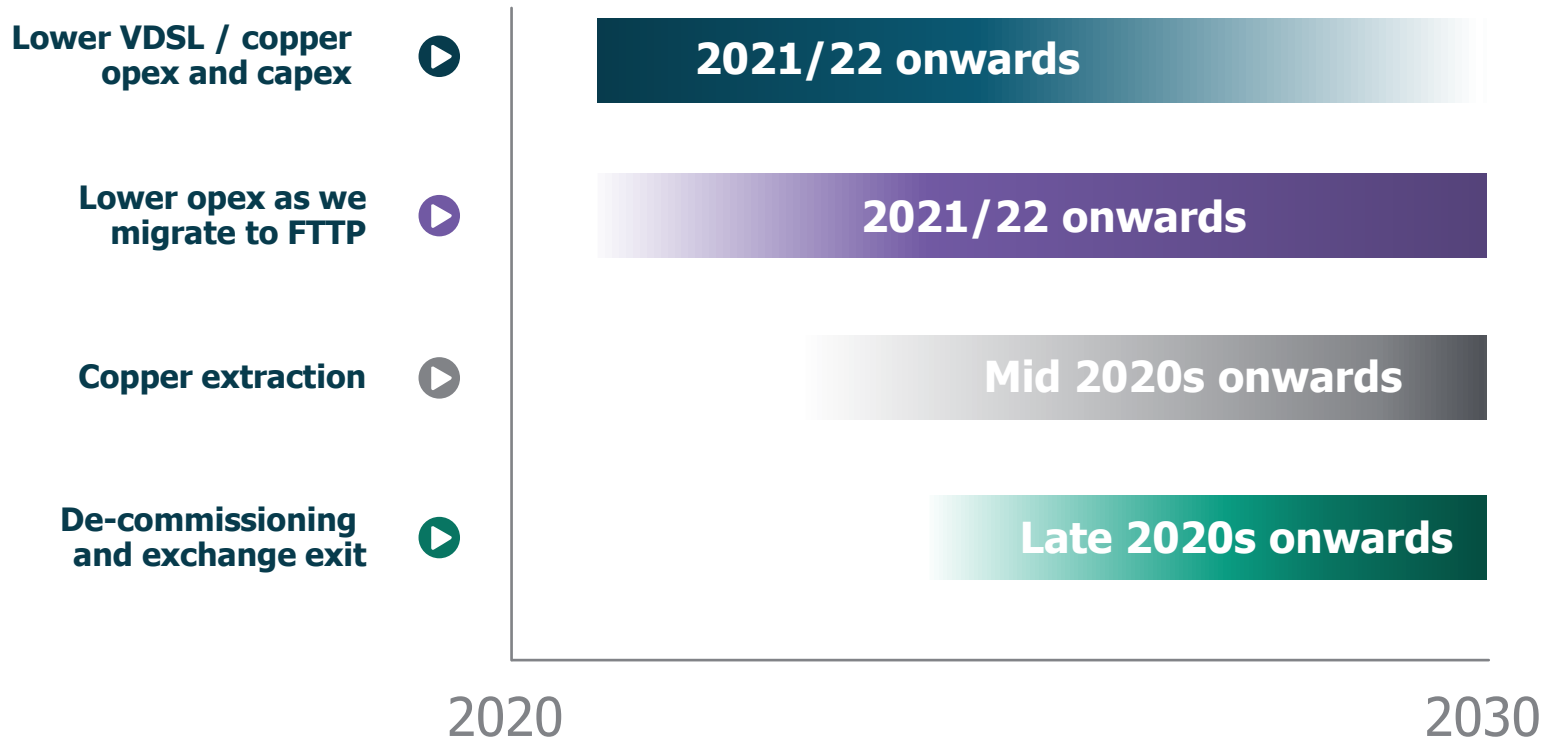
Data, systems and process integration



Openreach broadband lines in the Salisbury exchange area



FTTP will unlock a structural improvement in our economics, significantly reducing opex and capex intensity



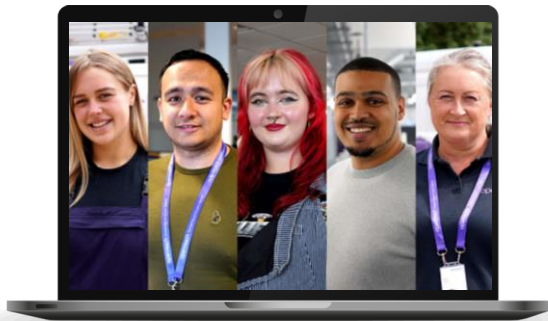
Digital impact and sustainability

Tackling climate change

- Transition our fleet to electric vehicles by 2030
- Reduce electricity consumption as we withdraw legacy products
- Reduce waste across our operation including extraction and re-use of legacy equipment
- Net Zero by 2030

Building a more inclusive business

Represent the communities we serve. 50% of senior management will be female by 2025.



Supporting better digital lives

Launched our **connect the unconnected** proposition



+27k
vans to transition to
Electric Vehicles (EVs)
646 EVs already on the road



- 01** Attractive, and therefore competitive, market
- 02** Openreach best placed to win
 - Lowest cost, fastest builder
 - Nationwide relationships with all CPs in place
 - Competitive pricing designed with and for our CPs
 - High quality VDSL platform
- 03** Transformed economics
- 04** Environmentally sound



03

Customers and trading

Katie Milligan

Managing Director, Customer, Commercial,
Propositions and Northern Ireland

Trading and Product portfolio

A reminder of our market

Voice and broadband



£4.3bn
revenue

Ethernet



£900m
revenue

Other



£24m
revenue

Our key priorities

Across all our products and segments

01

Driving
rapid
take-up

02

Increasing
revenue per
connection

03

Improved
customer
retention

Looking back

Over the last three years we've driven year-on-year revenue growth following our 2018 volume deal



Driving rapid take-up



Non-BT CPs have **doubled their fibre¹ penetration** from 38% to **77%**

Increasing ARPU



Additional
£1.92
on non-BT ARPU

Improved customer retention



Additional
7.6m
customers
on fibre¹ platforms

Key principles of the Equinox FTTP deal

Openreach has engaged with industry to design a deal that follows five key principles

1

Make FTTP the preferred technology

- Single, simple CP commitment to sell FTTP where available, in place of VDSL / copper

2

Create a modest premium on FTTP

- Maintain a full fibre premium vs. VDSL, recognising willingness to pay for quality broadband
- Offer a choice of speeds on the bandwidth gradient for CPs to create their own offers

3

Price competitively

- Openreach prices that are competitive given the scale, breadth and quality of our platform
- Mix incentives to encourage take up of higher bandwidths, and recognise the shift to higher speeds over time

4

Provide certainty

- Up to 10-year price certainty for up to 10-year copper stop sell commitment

5

Simplify

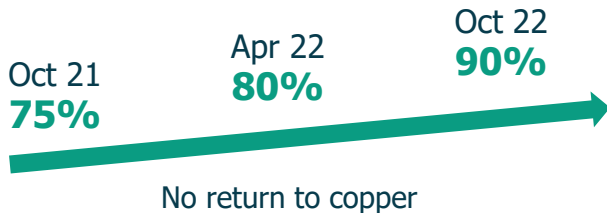
- National rental pricing that applies to all Openreach FTTP footprint

Looking forward: Equinox

Our focus has shifted to filling our FTTP platform using the commercial FTTP only deal

Driving
rapid
take-up

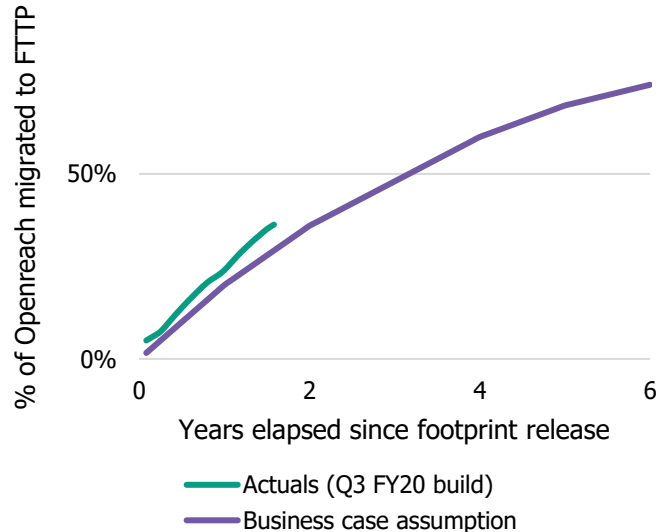
Growing % FTTP orders on growing footprint



Increasing
ARPU:
Strong mix
incentives

- ▶ Tight gradient:
£14 for 40Mbps, £22 for 1Gbps
- ▶ CPI on low speeds
CPI-1.25% on higher speeds
- ▶ ARPU share mechanism
- ▶ 500Mbps for price of 160Mbps for
New To Network (12 months)

Take-up ahead of expectations

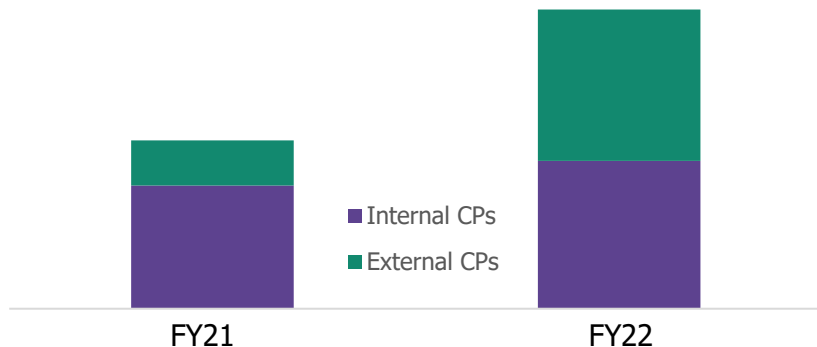


Equinox now launched and Openreach is growing market share in competitive areas

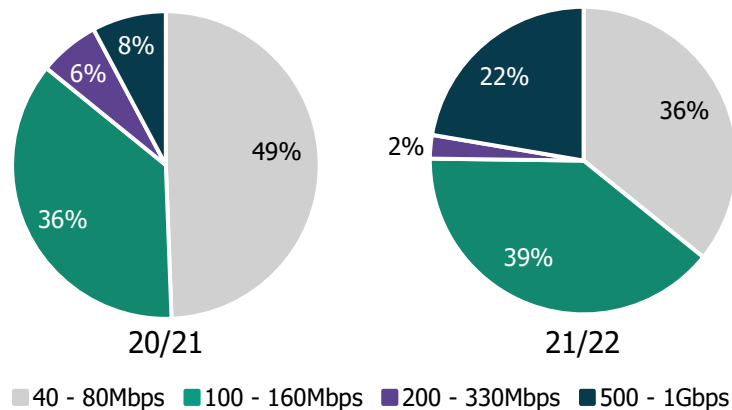
12 CPs have signed the offer, including our five largest

6 week net-adds from 1st October

Equinox



6 week speed mix from 1st October



Weekly **churn** on **FTTP** is **33% lower** than VDSL

Ethernet and backhaul connectivity

Ever-increasing demand for bandwidth is driving the business market

Driving rapid take-up



Year-on-year growth and a return to pre-Covid demand levels

Encouraging greater speed mix



Majority of Ethernet demand now 1Gbps

Improved customer retention



Signed multiyear 'very high bandwidth' deals with key CPs



Summary

- 01** We've demonstrated a strong track record filling our VDSL platform and we'll do the same on FTTP
- 02** 1.4 million customers are already on FTTP meaning we have more than 4.5 million homes to go after
- 03** FTTP take-up is ahead of expectations, and churn is much lower than on VDSL, demonstrating the attractiveness of our FTTP network
- 04** We see strong Ethernet demand and outlook following Covid-19 recovery



04

Service and cost transformation

Olly Kunc
Managing Director,
Service Delivery

We serve 25m homes and businesses across a huge national network of Copper, VDSL, Ethernet and increasingly FTTP

25m

customer homes
and businesses



+ 660

Communications Providers

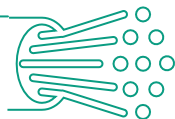


10m

Engineering jobs
in 2020/21

21k

service engineers



1.4m

Customers on FTTP

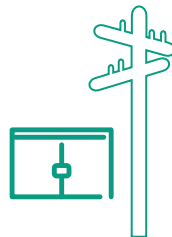
15k people recruited
and trained
over the **past 5 years**



176m

Kilometres

national network



Top 12

“Best Big Companies to Work For”



Top quartile employee engagement +77

11

world class
training facilities



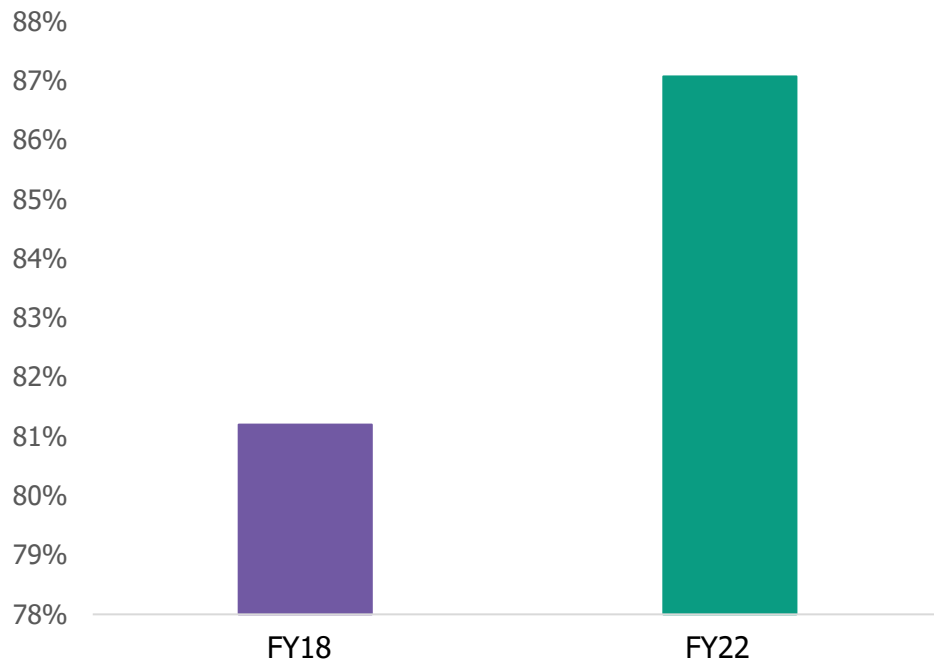
with

175k

training days capacity

Best ever service, despite highly turbulent times throughout Covid-19

On Time Repair



Network fault rate
down 5% since peak



Repeat faults rate
down 15% in 4 years

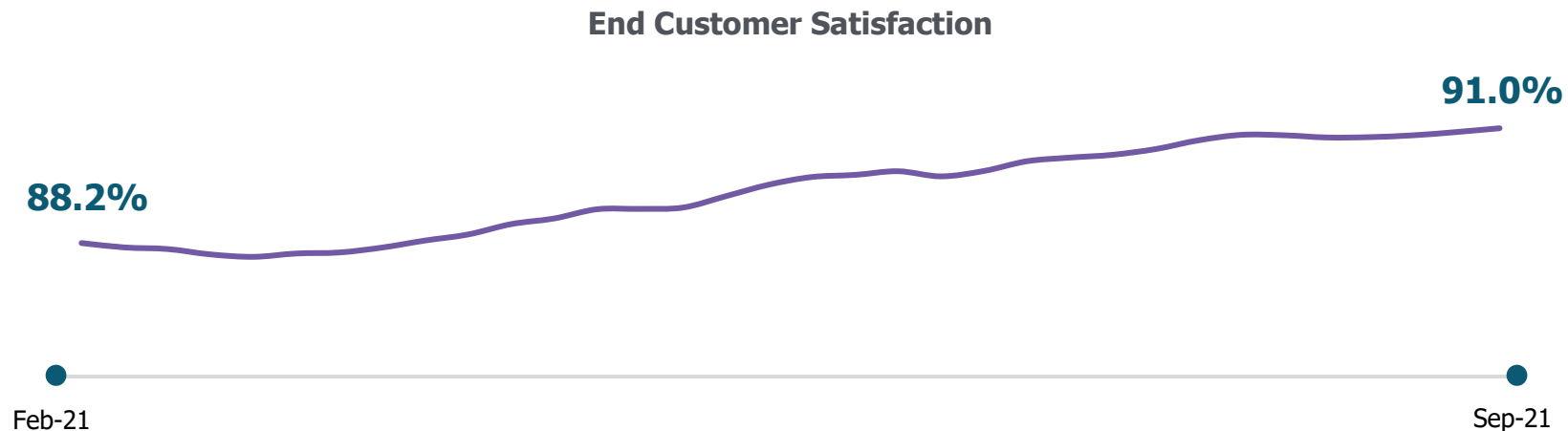


On Time Provision
consistent at >94%



Missed Appointments
reduced 50% from 15/16

Strong service reflected in end customer and CP feedback



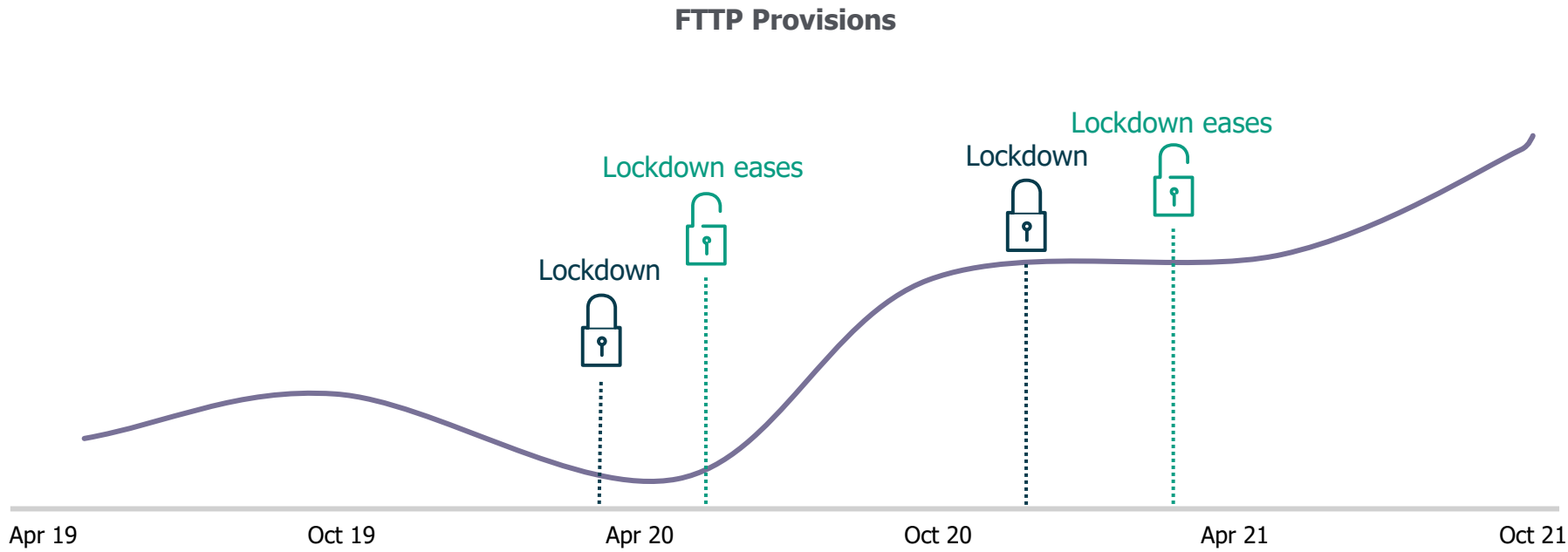
End customers have never been happier

Following lockdown release we've seen progressive increases in customer satisfaction

CP NPS up by 63.7 points since 2018

Service improvement is recognised by our CP customers

FTTP continues to grow rapidly

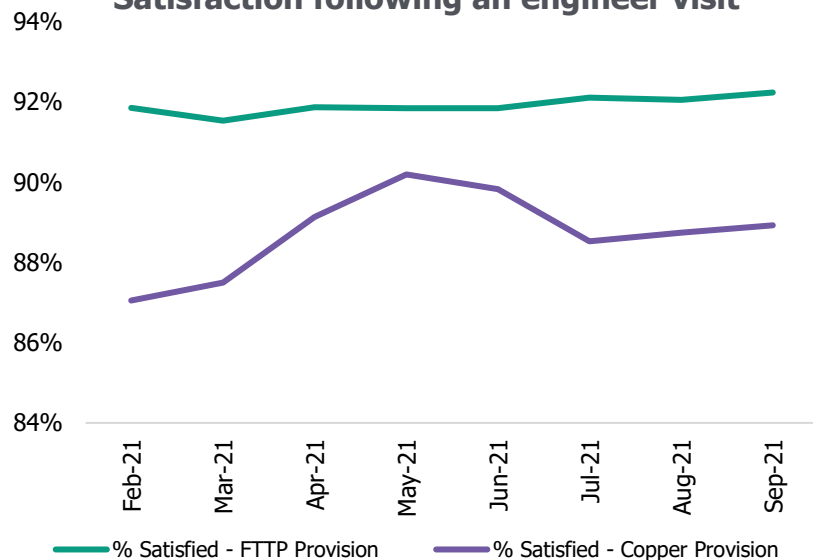


1.4m lines
up from 450k in 18/19

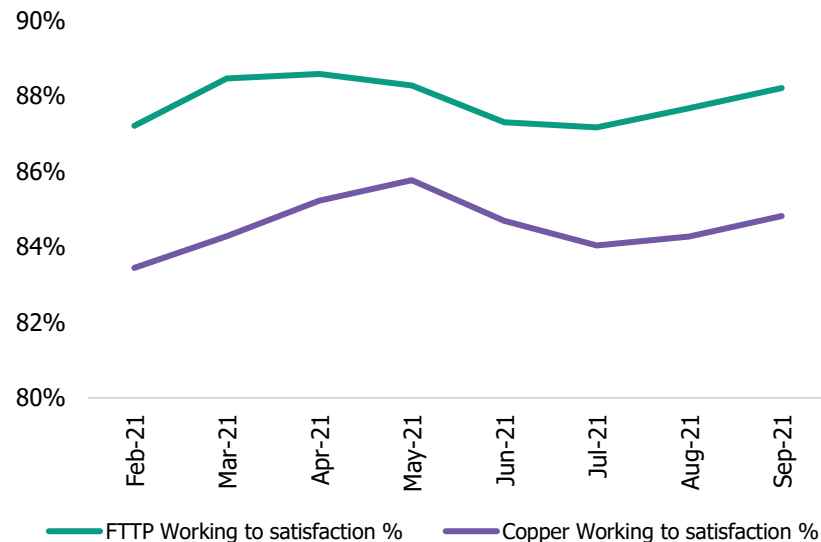
30k orders
in most recent week

FTTP customer satisfaction is strong and in life service drives lower churn

Satisfaction following an engineer visit



Satisfaction with product connectivity



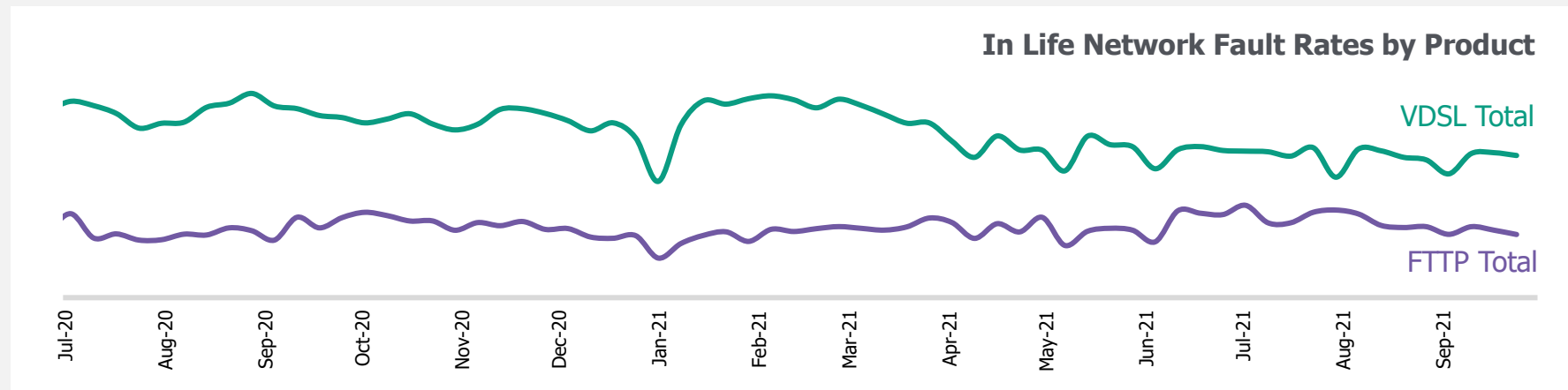
92%

FTTP on time provision

50%

lower early life failure than VDSL / copper

FTTP in life performance is strong and will drive lower costs



Network faults half
of copper with limited
weather impacts

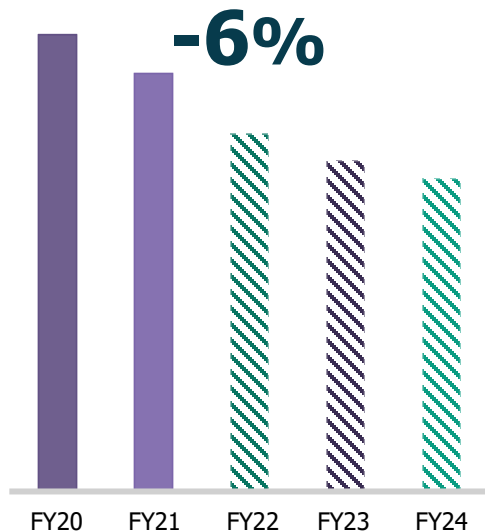
More stable technology
Strong and consistent performance
through Covid-19 home-working

Subsequent provisions
much lower cost
and “**zero**” touch

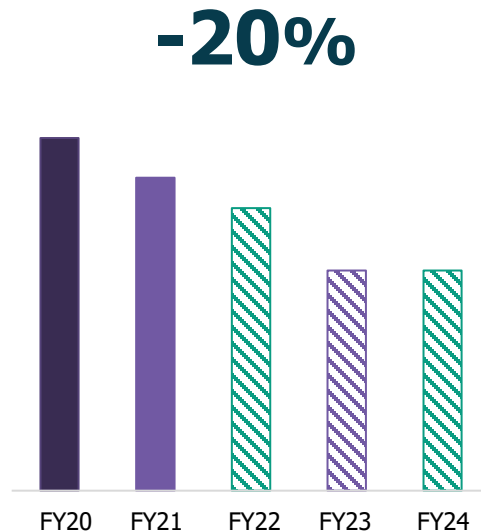
Further innovation opportunities

New engineering practices, testing and diagnostics capability and CP co-provisioning partnerships

Costs reduced significantly to FY22 with more to go



Cost per Physical Line¹
Down 6% since 19/20



Cost per FTTP provision
Down 20% since 19/20

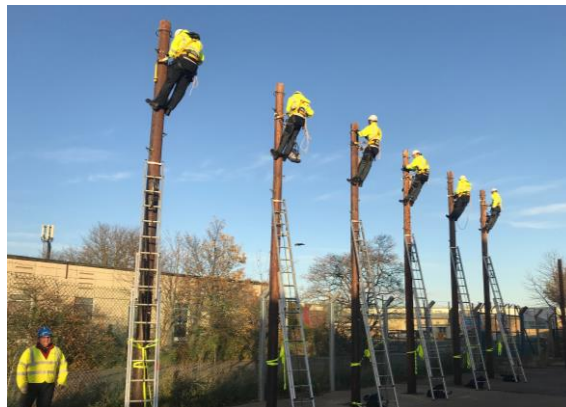
1. Total costs associated with service / repair divided by total line base

Award winning recruitment and training capability



**£15m investment
since 2016**

11 regional Open Street training
centres



**175k days
skilling capacity**

Up from 65,000 in 2016



**5,000 engineers
this year**

Deployed on fibre through a
combination of recruitment and
dual-skilling



We're aiming for

- 01 Fantastic service on copper**
Delivering commitments efficiently
- 02 Scaling on FTTP with world class service**
Re-skilling workforce as copper declines
- 03 Innovation and collaboration**
Digitalisation and big data revolution
- 04 World class team**
Safe, engaged, highly skilled



05

Financial

delivery and outlook

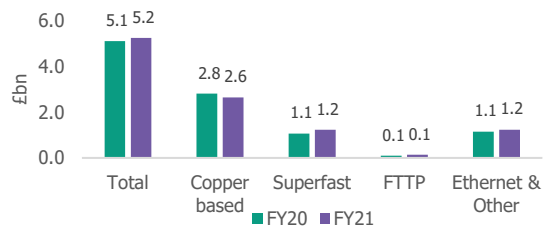
Matt Davies
Chief Finance Officer

Financial Performance

Strong dependable financial performance as we migrate to new technologies

(1) Revenue

Revenue by type



LOOKING BACK

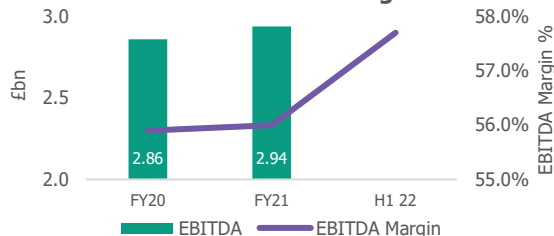
- Revenue growth of 1% in FY20 and 3% in FY21
- FTTP accounts for just £0.1bn of revenue in FY21

IN YEAR

- Revenue growth 5% in H1 FY22

(2) EBITDA and Profit Margin

EBITDA & Profit Margin



LOOKING BACK

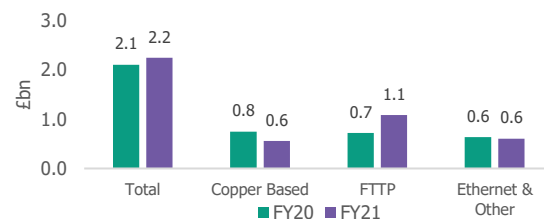
- EBITDA of £2.9bn in FY21 up 3%

IN YEAR

- EBITDA up 7% in H1 FY22
- EBITDA margin up from 56% FY21 to 58% H1 FY22

(3) Capex

Capex by type



LOOKING BACK

- FTTP capex growth of £0.4bn in FY21
- Total capex growth of £0.1bn in FY21

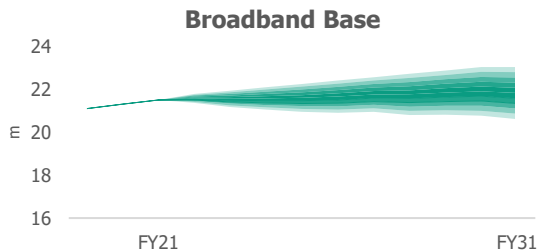
IN YEAR

- FTTP capex growth of £0.1bn in H1 FY22
- Total capex spend broadly flat in H1 FY22

Revenue

The broadband base and revenue is resilient

(1) Broadband Base



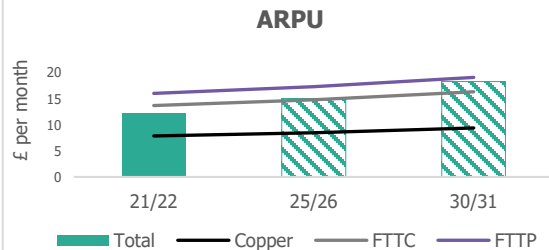
LOOKING BACK

- Base up from 21.1m in FY19 to 21.5m in FY21
- Share dropped from c.80% in FY19 to c.78% FY21
- Market share decline offset by c.0.4m annual growth in the broadband market

LOOKING FORWARD

- Market share reduces in all scenarios
- Broadband base broadly maintained in all scenarios
- Impact on broadband base from market share loss limited by c.0.4m annual growth in the broadband market

(2) ARPU



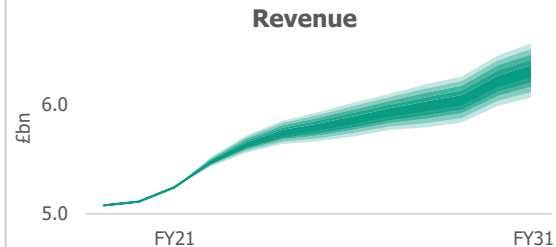
LOOKING BACK

- Broadband ARPU has grown as a higher proportion of the base have taken VDSL broadband.

LOOKING FORWARD

- Conservative assumption of flat prices in real terms by product type
- Real term ARPU growth comes from higher mix of FTTP – underpinned by Equinix deal

(3) Revenue



LOOKING BACK

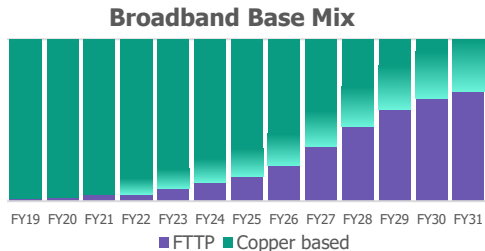
- Revenue growth driven by growing broadband base and higher mix of VDSL

LOOKING FORWARD

- In all scenarios revenue grows over the long term

Cost per line decreases over time as Openreach migrate to FTTP

(1) Broadband Base Mix



LOOKING BACK

- Broadband mix on FTTP just 5% in FY21

LOOKING FORWARD

- Broadband base will become dominated by FTTP by FY31 – underpinned by Equinox

(2) Fault Rates by Product

Fault Rates



LOOKING BACK

- Faults on copper reducing as we filter out non effective copper repair visits

LOOKING FORWARD

- Fault rates to reduce in line with migration to FTTP

(3) Cost Per Line

Average Service Cost Per Line



LOOKING BACK

- Service cost per line reduction driven largely by efficiency programmes improving productivity and reducing non effective visits

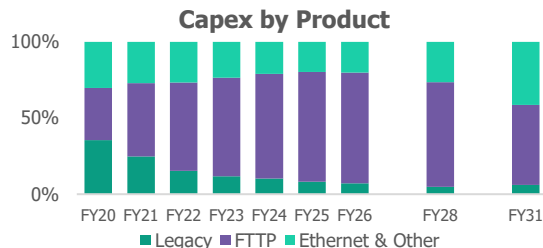
LOOKING FORWARD

- Service costs make up c.35% of Opex costs
- Average service cost per line drops by around 50% by FY31
- Opex savings c.£500m by FY31

Capex

Investment in FTTP drops significantly in FY28 as the bulk of FTTP build completes

(1) Capex by Product



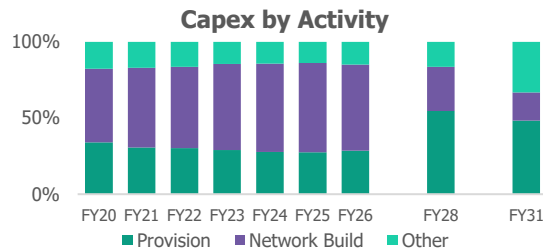
LOOKING BACK

- Copper network has historically been our largest investment, supporting VDSL superfast deployment and take up

LOOKING FORWARD

- FTTP peaks in FY26, offset by reductions in legacy

(2) Capex by Activity



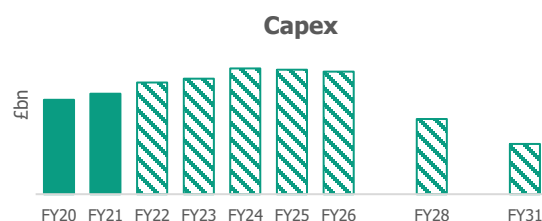
LOOKING BACK

- Network build is the material investment type
- Pivoted from copper augmentation to fibre build

LOOKING FORWARD

- Network build dominates capex until 2026
- Provision scales to growth in FTTP base
- Post 2026 network capex drops as bulk of FTTP build completes

(3) Total Capex Spend



LOOKING BACK

- FTTP capex growth of £0.4bn in FY21
- Total capex growth of £0.1bn in FY21

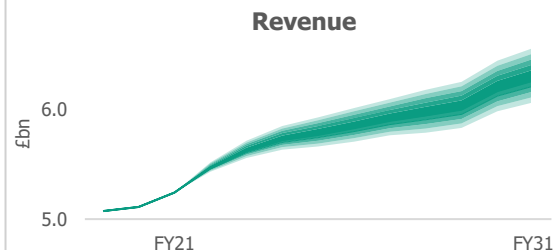
LOOKING FORWARD

- Total capex peaks from around FY24
- Peak investment in FTTP between in FY26 is offset by lower legacy investment and efficiency
- FY28 Capex drops off by at least £1bn as bulk of FTTP build completes
- FY31 Capex drops as FTTP provision volumes slow

Summary

Openreach will deliver growth across revenue, EBITDA and NCF

(1) Revenue driven by ARPU and resilient broadband base



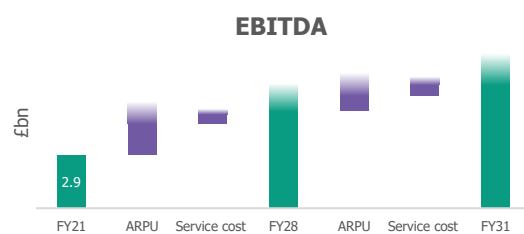
HEADLINE

We are confident we will grow revenue over the long term in a wide range of altnet build scenarios

KEY ENABLERS

- Growing broadband market cushioning any losses to altnets
- ARPU growth in real terms driven by higher mix of FTTP and CPI linked indexation

(2) EBITDA further supported by increasing margins*



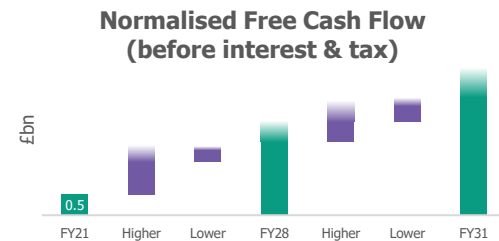
HEADLINE

The growth in revenue will translate to growth in EBITDA which will be further enhanced by expanding margins

KEY ENABLERS

- Revenue flow through from higher ARPU FTTP
- Migration to lower cost to serve FTTP platform

(3) Cashflow benefits from higher EBITDA and lower capex*



HEADLINE

Normalised Free Cash will grow significantly FY28 as the bulk of build activity completes and then continue to grow to FY31 driven by lower Capex and growing EBITDA

KEY ENABLERS

- Build to 25m homes completes in December 2026
- Provision volumes hit peak in FY28
- EBITDA increases from revenue flow through and lower cost to serve FTTP platform

* EBITDA and Cashflow graphs not to scale



- 01 Majority of customer base on VDSL**, which meets the needs of most consumers today
- 02 Building at an unrivalled pace and cost. Will be almost everywhere by Dec-2026**
- 03 Selling and provisioning in higher volumes** every week, **Equinox deal will drive rapid adoption**
- 04 We are transforming, simplifying and taking cost out – full fibre will super-charge cost reductions**
- 05 We will continue to command the strongest economics**, as we are ahead on:
 - a. People and skills**, and
 - b. Technical innovations**



06

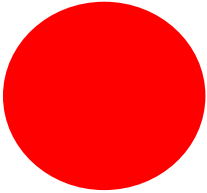
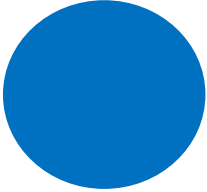
Q&A

A man with short blonde hair and safety glasses is working on a server rack. He is wearing a dark blue polo shirt and a black wristband. The server rack is open, revealing multiple server units with cooling fans. The background is a purple wall. A teal vertical bar is on the left side of the image.

07

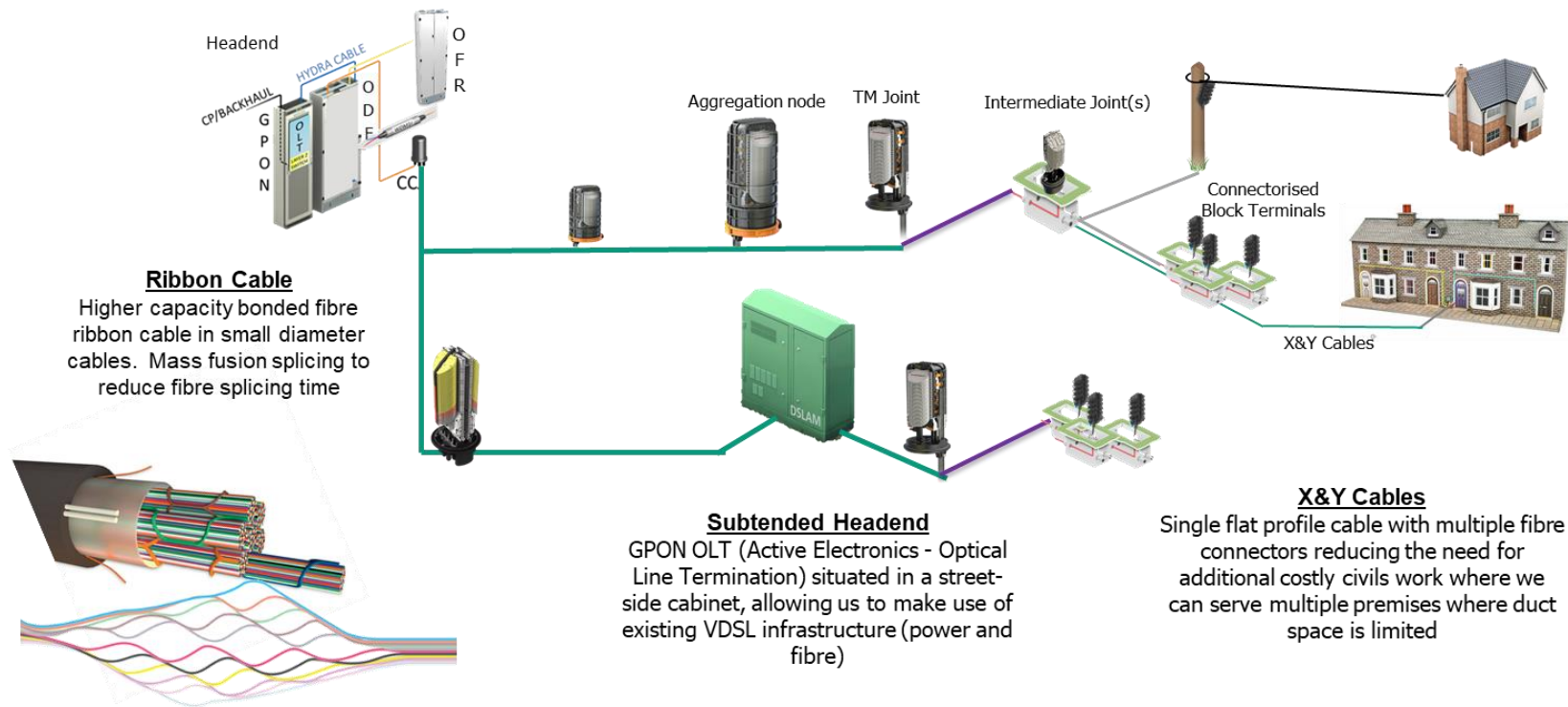
Technical innovations

Technical innovations

Group	Initial location	Innovation	Host
	Showcase	• Subtended headend • X&Y cable • Fast installation	Claire
	Meeting room area	• Ribbon fibre cable • Mass fusion splicing	Fi
	G.09	Digital workflow for fibre: • Orion • MyServices App	Tamsin

Engineering innovation

Network diagram showing innovations



Engineering innovation

Solution

Description

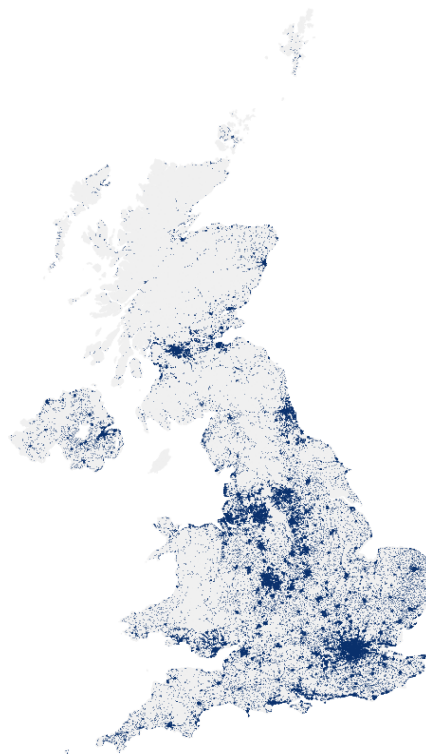
Key Messages

Subtended Headend

A small part of the FTTP headend remotely situated in a street cabinet, allowing us to make use of existing VDSL infrastructure (power and fibre)

Enables faster and cheaper FTTP build in rural areas

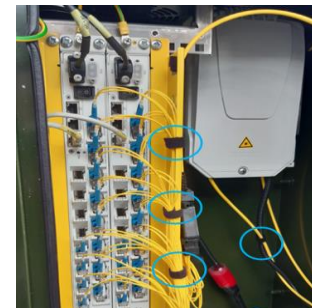
- Avoids costly civils works and traffic management delays by re-using existing equipment built for VDSL
- Reduces the number of costly spine routes required
- 2 fibres can enable as many as 6,500 homes with FTTP (would normally require more than 200 spine fibres)



94,500 existing VDSL cabinets

FIBRE

POWER



Engineering innovation

Solution

Description

Key Messages

X & Y Cables and fast installation

Single flat profile cable with multiple connectors. Used where duct space is limited, to reduce the need for costly civils work

Faster and cheaper FTTP connections

- Where space is limited and we can only fit one cable through the duct, this enables us to connect multiple premises with a single cable, avoiding expensive civils work
- The 'X cable' can be deployed to 4 premises served by a single small diameter duct (e.g. rubber duct 100) and the 'Y cable' can be deployed to 2 premises
- Cost effective final drop solution for terraced, semi detached, converted multi-dwelling units and maisonettes.

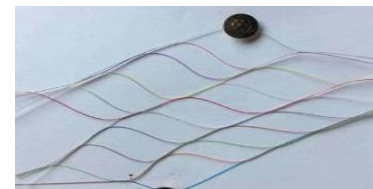
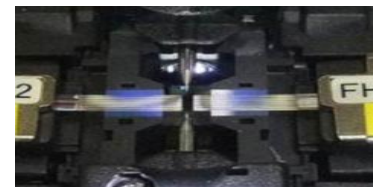


Ribbon fibre cable & mass fusion splicing

Provides the ability to mass fusion splice 12 fibres in a single action – increasing productivity and reducing physical cable size

Faster and cheaper FTTP build in rural and urban areas

- Reduces the time it takes to splice high volume fibre cables in our spine network by a factor of 12
- Cable design, with higher fibre density in small diameter cable, avoids future capacity constraints and more capable of getting through limited duct space
- Openreach first to bring technology to Europe; optimized to work with our network and engineering practices



Civils solutions

Solution

Description

Key Messages

Cleanfast Machine

The Cleanfast is a game changer for carriageway trenching. It can trench up to 670mm in depth, without needing to remove the spoil from the roadside.

With its innovative vacuum system, it's capable of clean trenching 1,000 metres per day. No matter how rural the project, the spoil can be tipped into low sided skips and taken away from the site.

Faster and cheaper FFTP build

- Causes less disruption to local residents in remote and rural locations
- Speeds up build and deployment by up to 10x compared to other methods
- Increases likelihood of being granted permits in the first instance (e.g. AONB and National Parks)
- Environmentally friendly, dust and debris removed instantly through the vacuum attached
- Reduces manual handling and musculoskeletal injuries



Marais Trencher

Narrow trenching machine of limited size, making the machine perfect for housing estates and cul-de-sacs

Faster and cheaper FFTP build

- More than 5x quicker than conventional methods for both footpath and carriageway trenching
- Less disruptive for residents and road users
- Environmentally friendly with narrow trenching
- Remote controlled - increasing safety for the operative



Civils Solutions

Solution

Description

Key Messages

Ground Penetrating Radar (GPR)

GPR is a non-intrusive method of detecting buried objects and ground features. It operates using a range of frequencies depending on the application it is being used for:

200-900MHz for utility detection

1GHz – 2GHZ for pavement analysis

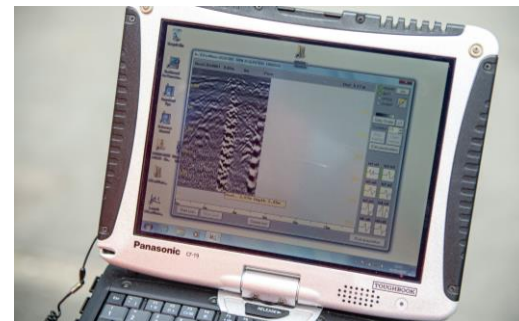
<100Mhz for geological investigations

GPR can be handheld, mounted on a cart to be pushed or towed behind a road vehicle.

GPR works by transmitting radio waves into the ground and detecting the reflections returning to the antenna. The time this takes to happen gives the depth to the target.

Faster and cheaper FFTP build

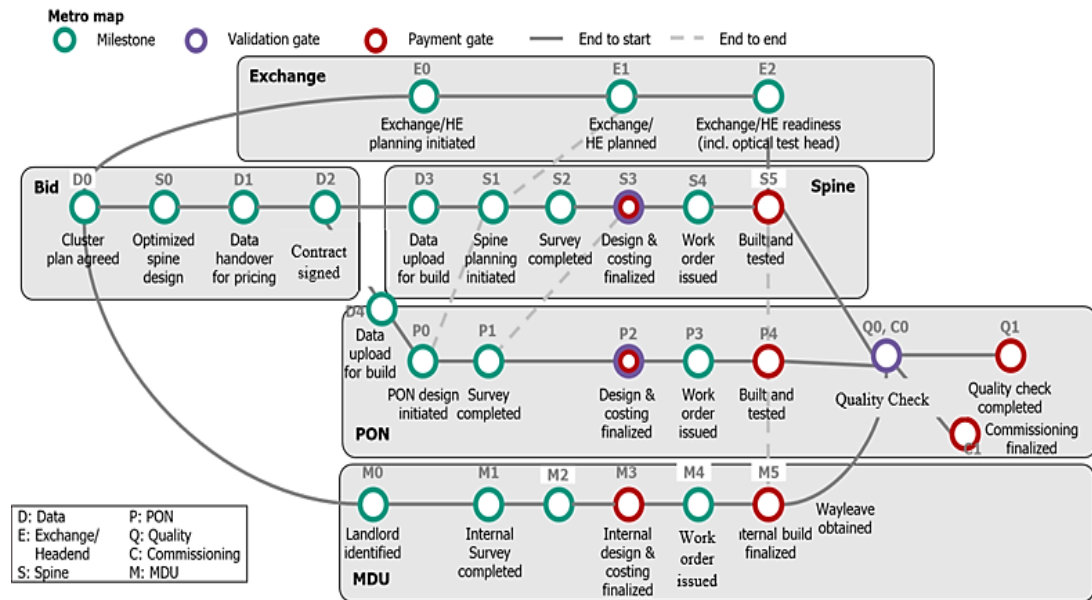
- Helps identify non-metallic objects/utilities that are not detectable using conventional methods such as plastic gas and water services hence avoiding delays caused by strikes
- Less disruption to residents
- Safer working environment with increased utility strike avoidance



Systems innovation

Solution

Digital Workflow for Fibre



A digitised fibre plan and build journey to enable our scale build

- We've mapped our fibre journeys and detailed process steps – and we've built them into an end-to-end digital solution which allows us to scale our build whilst maintaining control over cost and quality.
- Updates happen automatically as part of the 'day job' reducing manual steps for our engineers.
- Our goal is that all systems will be automated (no swivel chairing, forms, spreadsheets) - ensuring end-to-end data quality.
- We've introduced modern apps using the latest IT platforms.

Systems innovation

Solution

Description

Key Messages

Orion

Providing our partners access to all the key services required to install full fibre FTTP broadband

A modern app installed on an industrial grade PC for use in all weather conditions by surveyors from both Openreach & our partners.

Allows an engineer to complete a survey whilst out in the street – making sure that our build plans are informed by the real-world situation.

A set of best practice build rules are applied automatically to every survey ensuring quality is built into our network from the outset.

- Survey & planning is critical to driving scale FTTP build. We now have 9,500 surveyors trained on Orion.
- 88.5K surveys completed already – ensuring that our build time & costs are optimised before we commence the work.
- Build quality is assured from the outset – reducing re-work and improving customer experience at point of provision.



Systems innovation

Solution

Description

Key Messages

MyServices App

Using the latest cloud technology to enable any partner, including CPs, to work effectively on behalf of Openreach.

Works on multiple platforms because our partners use various devices.

Enables partner engineers to:

- View job details
- Activate and test the service
- Self-serve network services such as network re-routes
- Complete customer handover

All within simple and intuitive guided journeys which help engineers perform at their best first time, on time, every time.

Benefits

- Improving engineer and customer experience
- Enable partners to work more effectively on behalf of Openreach.
- Successfully scaled our business in unprecedented times to keep the UK connected
- Underpinning and enabling the scaling of our multi-billion-pound UK fibre broadband build



openreach

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