

CityFibre is rolling out gigabit connectivity to 8M premises

Tuesday 24 February 2026

Welcome

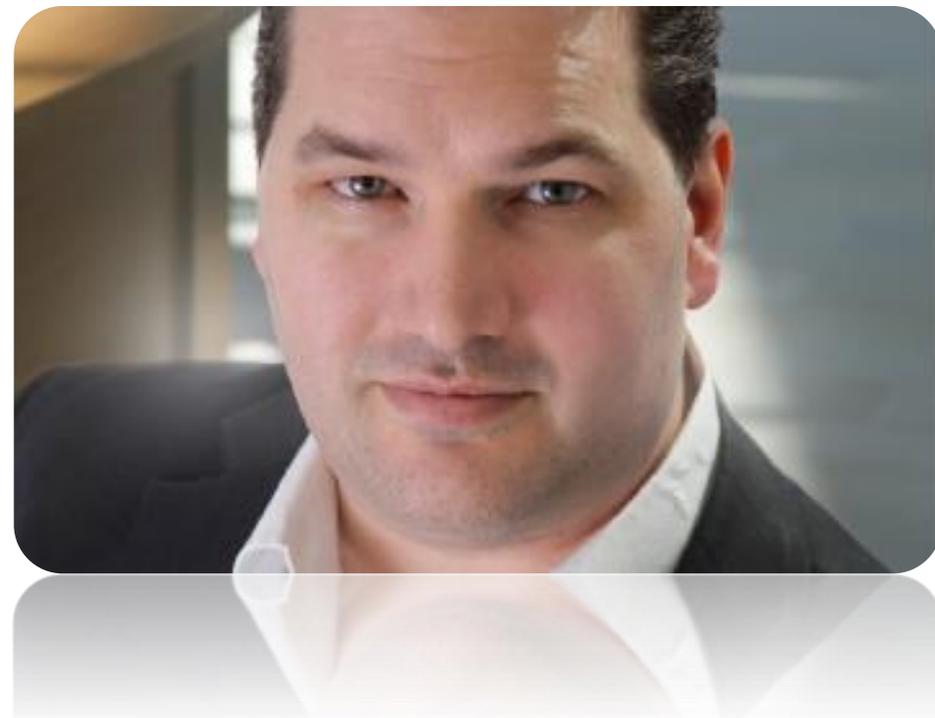
The event will start at 7:00pm

Introduction: George Williamson, Committee Member, Anglian Coastal Local Network

Presenter(s): Clayton Nash, Strategy Director, CityFibre

Questions: Live in the Atrium & via Q&A Messaging in Teams. In Teams, please type in your questions and these will be taken in a Q&A session at the end of the presentation.

Close: Approximately 8:15pm



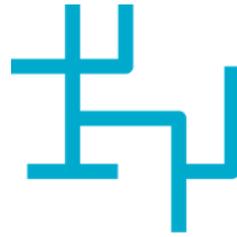
DELIVERING THE UK'S NETWORK OF CHOICE

Clayton Nash
Strategy Director | CityFibre
February 2026



OUR FOUNDING MISSION IS UNCHANGED

To deliver a better-
connected Britain and
set new standards in
our industry



DEPLOY

a new generation of intelligent,
full fibre infrastructure



TRANSFORM

the digital capabilities of the
nation's citizens and businesses

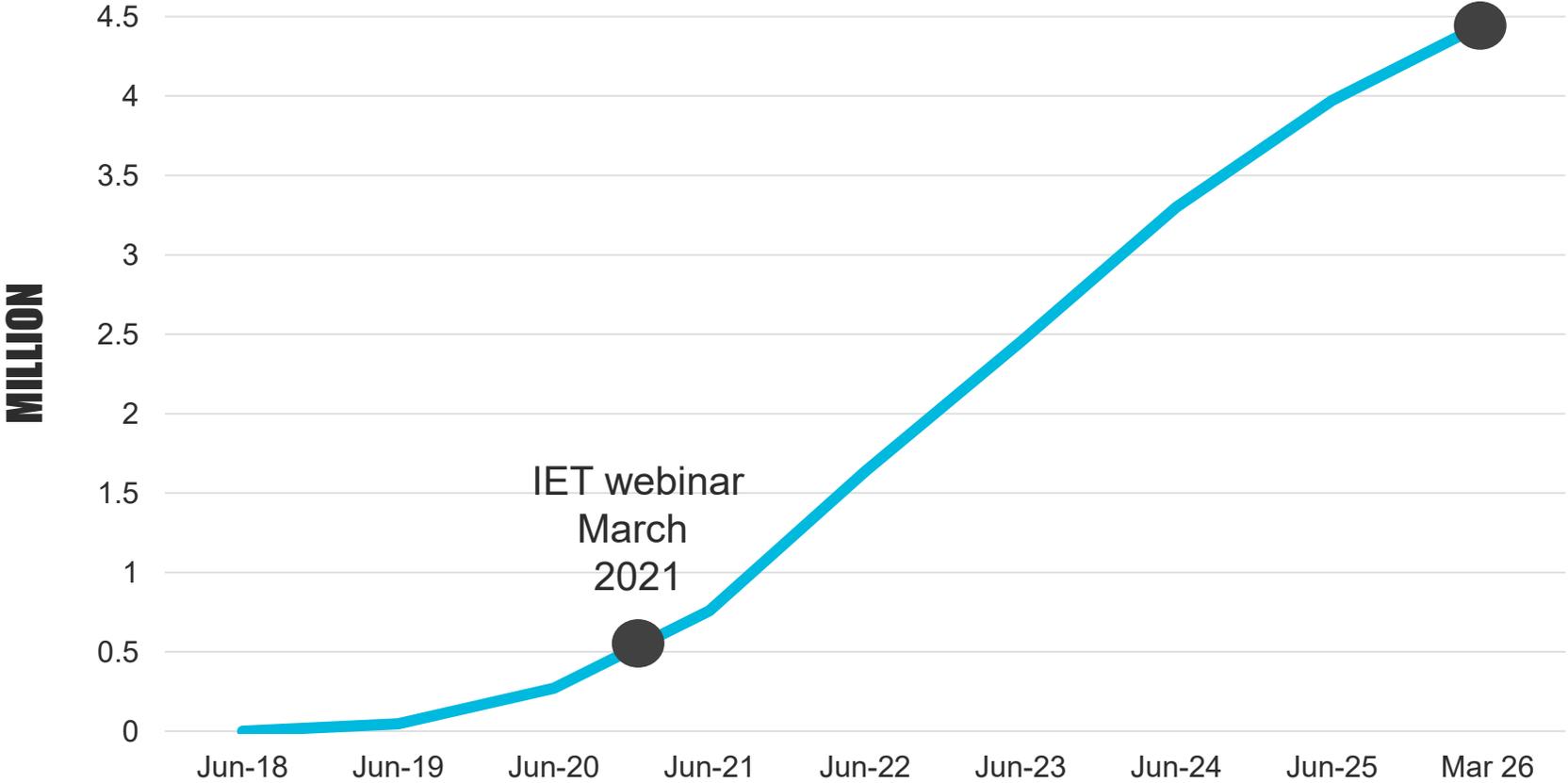


SPARK

innovation and future proofing
our nation's economy in the data
age

SINCE LAST SPEAKING TO YOU

NUMBER OF PREMISES RFS



WE'VE GROWN INTO THE UK'S LARGEST INDEPENDENT FIBRE-ONLY NETWORK

The UK's fastest broadband speeds

from any major provider





**NOW LOOK
CLOSER**

The UK's Fastest Broadband Speeds Have Landed as of July 2025

Claims around fastest broadband are based on comparisons with all other major broadband providers in the UK. We define 'Major providers' as the companies listed below who are recognised as having a large enough market share to warrant inclusion in Ofcom's latest (Q4 2024) quarterly report on Complaints about broadband, landline, mobile and pay-TV services.

We have reviewed major UK broadband providers to identify the fastest direct-to-consumer broadband download speeds available to the hub.

Sky is the only known major UK broadband provider (as defined) to offer download speeds of 5gbps direct to consumer.

Major UK Provider *	Fastest Speed Offered	Notes	Date Capt
Sky	5gb	Full Fibre, direct to home and available via CityFibre network	01/7/2025

NONE OF THIS IS BY ACCIDENT

sky

VodafoneThree

TalkTalk



IT'S DRIVING OUR GROWTH...



112%

increase in rate of
customer installs

82%

Rise in connected
customers



~50%

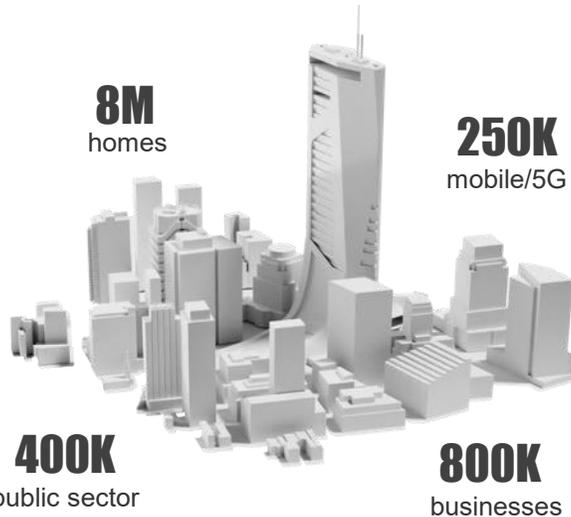
consumer
revenue growth

480%

increase in
adjusted EBITDA

IT PROVES OUR MODEL & IS ENABLING NEXT STEPS

CARRIER-NEUTRAL WHOLESALE OPERATOR, TARGETING OVER...



FINANCED FOR SUCCESS BY LENDERS & SHAREHOLDERS

£5.6BN DEBT FINANCING



£3BN EQUITY RAISED



UNLOCKING THE BENEFITS OF INFRASTRUCTURE COMPETITION



BETTER PRODUCTS



BETTER SERVICE



BETTER ECONOMICS

SO, WHAT DECISIONS DID WE TAKE?

- Build for wholesale
- Own our infrastructure
- Keep our products simple but powerful
- Provide honest, transparent diagnostics
- RFS means RFS
- Expect and plan for M&A

BUILT FOR WHOLESALE

ZERO TOUCH IS KEY

When you're delivering 2-3k connections a day you can't have people in the process

EFFICIENCY = LOW PRICES

We have one job – deliver the fastest fibre connection

ALWAYS THINK CUSTOMER

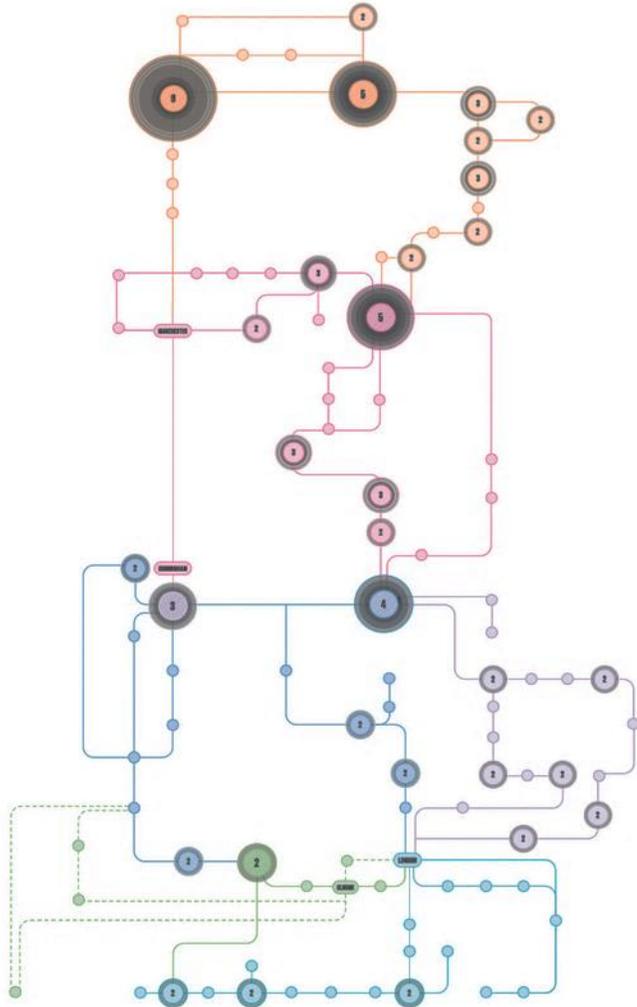
People expect Amazon style delivery. You can manage your install

SHARE THE DATA

Expose fibre's millisecond performance visibility, so our customers can be honest with theirs

OWN OUR INFRASTRUCTURE

We have built most of the infrastructure our ISPs now rely on to deliver exceptional customer experience



FIBRE EXCHANGES (FEX)

FEXs give us control over how we deploy network equipment and deliver dense volumes of customers to ISPs

NATIONWIDE FIBRE BACKBONE

Enables all our 50+ ISPs to deliver traffic without needing to unbundle every FEX

CITYWIDE FIBRE ACCESS RINGS

Ultra-high-capacity rings enable high demand applications like mobile backhaul

OSS/BSS

Own-built operating platforms make us vendor independent, while delivering the service profiles our ISPs demand

WORK MANAGEMENT

Running our own platform, means we can ensure engineers turn up on time, and deliver tracking-enabled certainty for end customers

INTELLIGENCE, RELIABILITY AND LOW LATENCY STARTS IN OUR FIBRE EXCHANGES



HIGHLY SECURE



RELIABLY POWERED



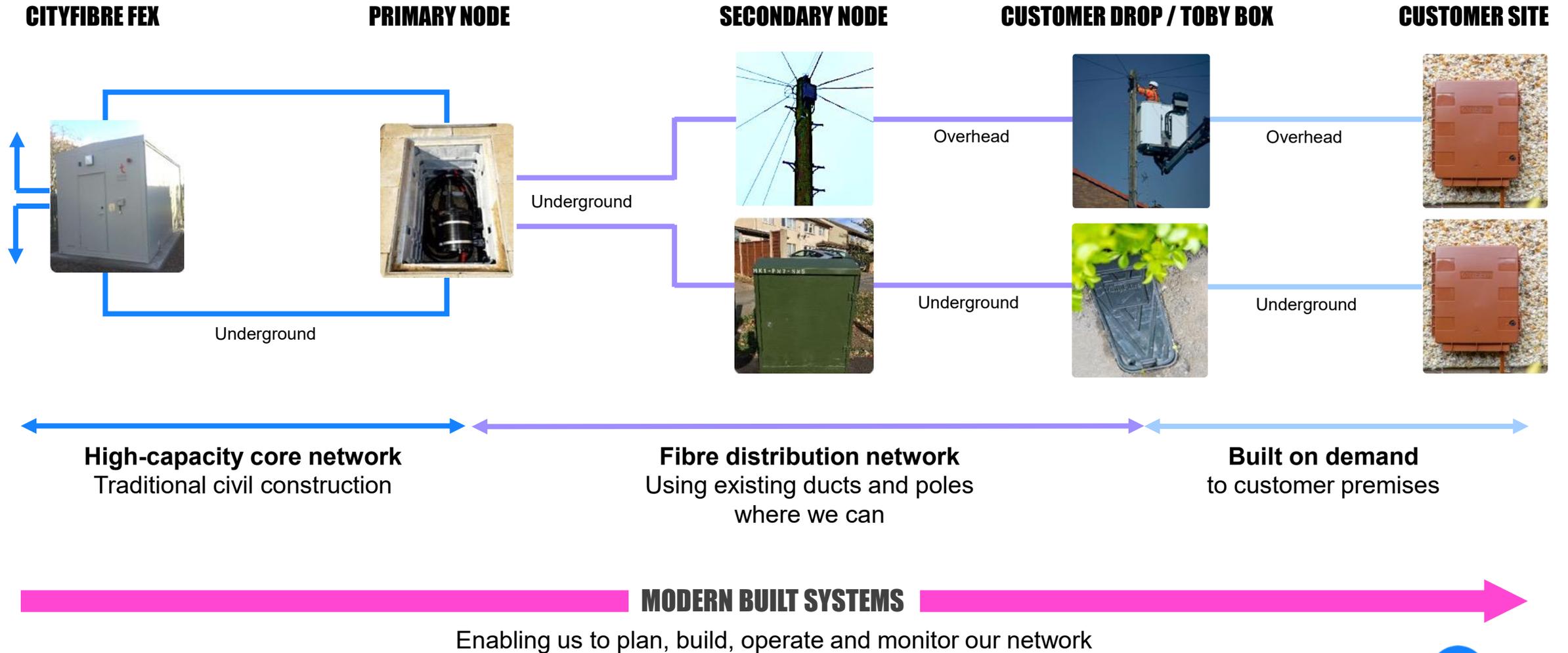
HIGHLY RESILIENT



CLIMATE CONSIDERATE



EACH FEK SERVES A CAREFULLY ARCHITECTURED LOCAL NETWORK



IT'S ALL ABOUT GETTING IT RIGHT ON THE DAY

AERIAL

Aerial Secondary Node (ASN)



ASN being raised



Final drop



SYSTEMS TO KEEP EVERYONE INFORMED FROM ORDER TO GO LIVE

UNDERGROUND



Secondary Node Cabinet



Toby box



Dig & reinstate



Wall box



Home install



DELIVERING THE BEST SOLUTIONS AT THE RIGHT PRICE

While embracing the fact that innovation matters but simplicity drives take-up

BEST PRODUCT

The full capability of fibre offered via a simple, innovative product set

LARGEST XGS-PON NETWORK

MULTI-GIG OPTIONALITY

VALUE-ADD SUPPORT

SYNCHRONOUS SPEEDS

BEST PRICE

Pure wholesale model with attractive prices from entry level to multi-gig

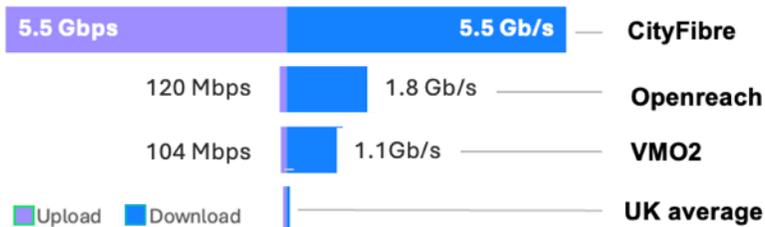
- Up to ~40% cheaper vs Openreach
- One price per product – no cost implication to upgrade speeds
- Enabling the speeds consumers deserve at a price that's right

BEST SERVICE

Targeting excellence to reduce ISP issue management costs and increase loyalty

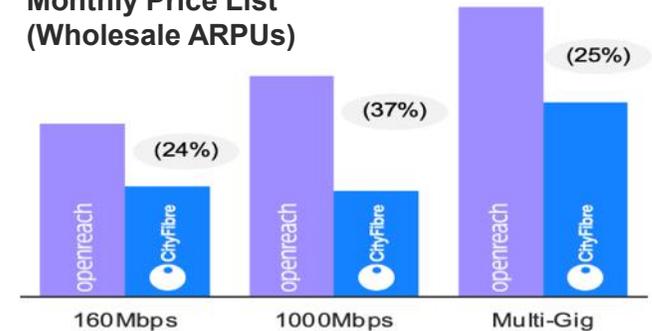
- Market leading on-time install = fewer cancellations & better ISP margins
- High reliability = stickier customers
- Fault? communicate well & fix fast

Uk broadband speeds available at scale



HOW WE COMPARE

Monthly Price List (Wholesale ARPUs)



XGS-PON WHY UPGRADE?

CAPABLE OF FASTER SPEEDS	<10 Gbps down (v 2.5 Gbps)
	<10 Gbps up (v 1.25 Gbps)
SYMMETRICAL	Same speeds in both directions
FUTURE FIT	Next generation technology
SERVES MORE CUSTOMERS	4 x downstream & 8 x upstream capacity

XGS-PON WAS ALWAYS OUR LONG-TERM VISION, BUT...

A

COST

We started building to serve homes in 2017, long before XGS-PON was cost effective

B

LIMITATIONS

Early XGS-PON platforms lacked scalability & functionality

C

TIMING

We knew GPON would serve us well for the first part of our journey

THE ROAD TO 100% COMPLETION SAW US RAPIDLY UPGRADE:

- 55,000 PON ports
- 277 OLTS
- 114 Fibre Exchanges



4,600 PON ports within 44 Active Fibre Cabinets.

ULTIMATELY GIVING EVERY HOME & BUSINESS ACCESS TO A MULTI-GIG FUTURE

**BUT SURELY NO ONE
NEEDS MULTI-GIGABIT
SPEEDS... DO THEY?**

HIGH SPEED CONNECTIONS MATTER MOST 'IN THE MOMENT'

People need it when they need it and quickly get used to a good thing!

NEW CUSTOMER BEHAVIOUR & EVER-INCREASING CONTENT RICHNESS

=

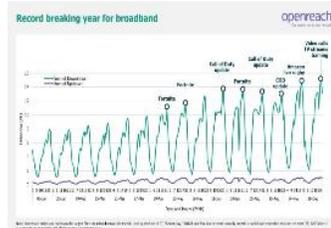
NEW CONNECTIVITY REQUIREMENTS



EVER-GROWING PAGE SIZES

Rising image quality, 3D models, virtual tours & AR

Viewing just **30 MB** of content in **1 sec** requires a **240 Mbps** connection



CLOUD STORAGE & INTERACTIVITY

More applications, larger backups & sharing



EVERYTHING IS VIDEO

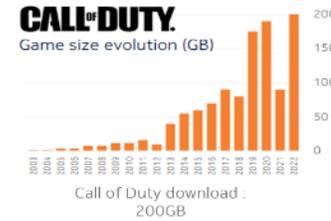
Multi screening & quality streaming demand more

Downloading a UHD movie (**14 GB**) takes:
19 mins @ 100 Mbps
28 seconds @ 4 Gbps



CLOUD GAMING

XR/VR, streaming, sharing, interacting (all in parallel)



MEGA DOWNLOAD SIZES

Keeping customers is key

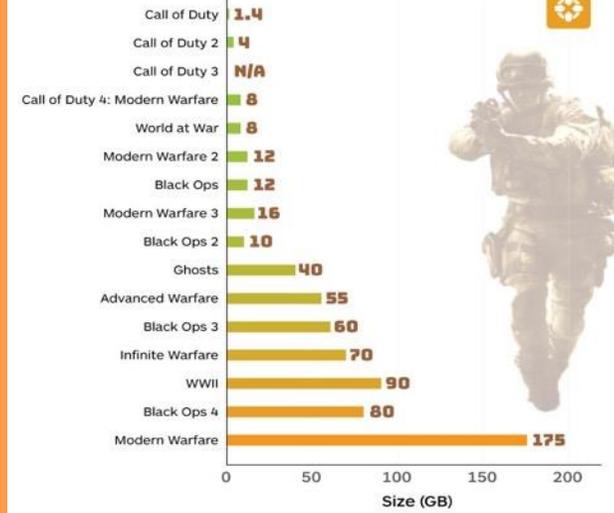
Downloading a **200GB** Call of Duty update takes:
4.5 hours @ 100 Mbps
13.5 mins @ 2 Gbps



WORKING FROM HOME

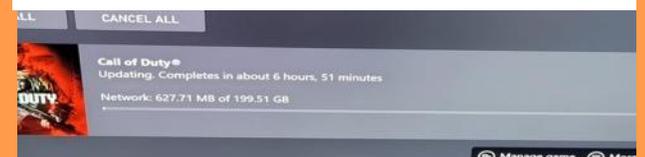
Hybrid & home working is here to stay

Every Major Call of Duty Install Size (PC)



Numbers based on the recommended storage listed in each game's official PC system requirements. Call of Duty 3 excluded as it was never released on PC.

r/XboxSeriesS · 1 yr. ago
Engelbert_Goetnard
How? Why? 200GB update? The game itself is only 113GB.



rac-attack · 1y ago ·
Yeah I'm happy that I gave up on Call Of Duty. It's not even that it's just a 200GB update, it's the fact that you download the update and then next week there's another 200GB update..

AbracaDaniel21 · 1y ago ·
I'm glad I don't play anymore. I have a data cap. I wouldn't be able to handle that.

UPLOAD IS THE NEW DOWNLOAD



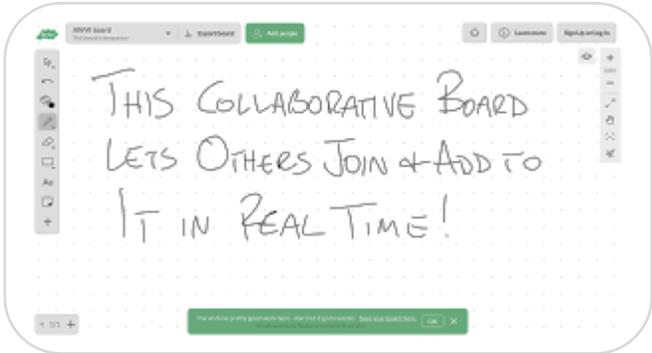
REAL TIME SECURITY FOOTAGE



FILE SHARING, CLOUD STORAGE AND BACKUP



LIVE EVENT BROADCASTING



ONLINE & CREATIVE COLLABORATION

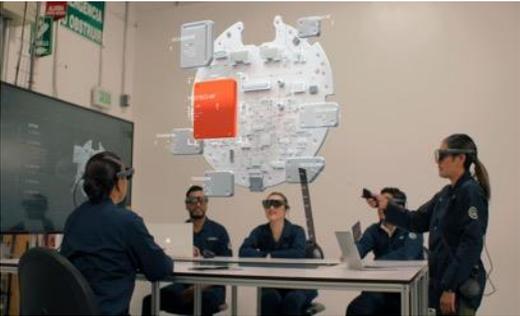


SHARED ONLINE & METAVERSE GAMEPLAY

NEXT-GENERATION TECH WILL KEEP DRIVING DATA DEMAND

The future points to an era of immersive, interactive, and connected experiences that blur the boundaries of our physical and virtual realities.

SPATIAL COMPUTING



SUSTAINABLE TECH



AI IN EXTENDED REALITY (XR)



HOLOGRAPHIC DISPLAYS



EDGE COMPUTING



METaverse PLATFORMS



BRAIN-COMPUTER INTERFACES



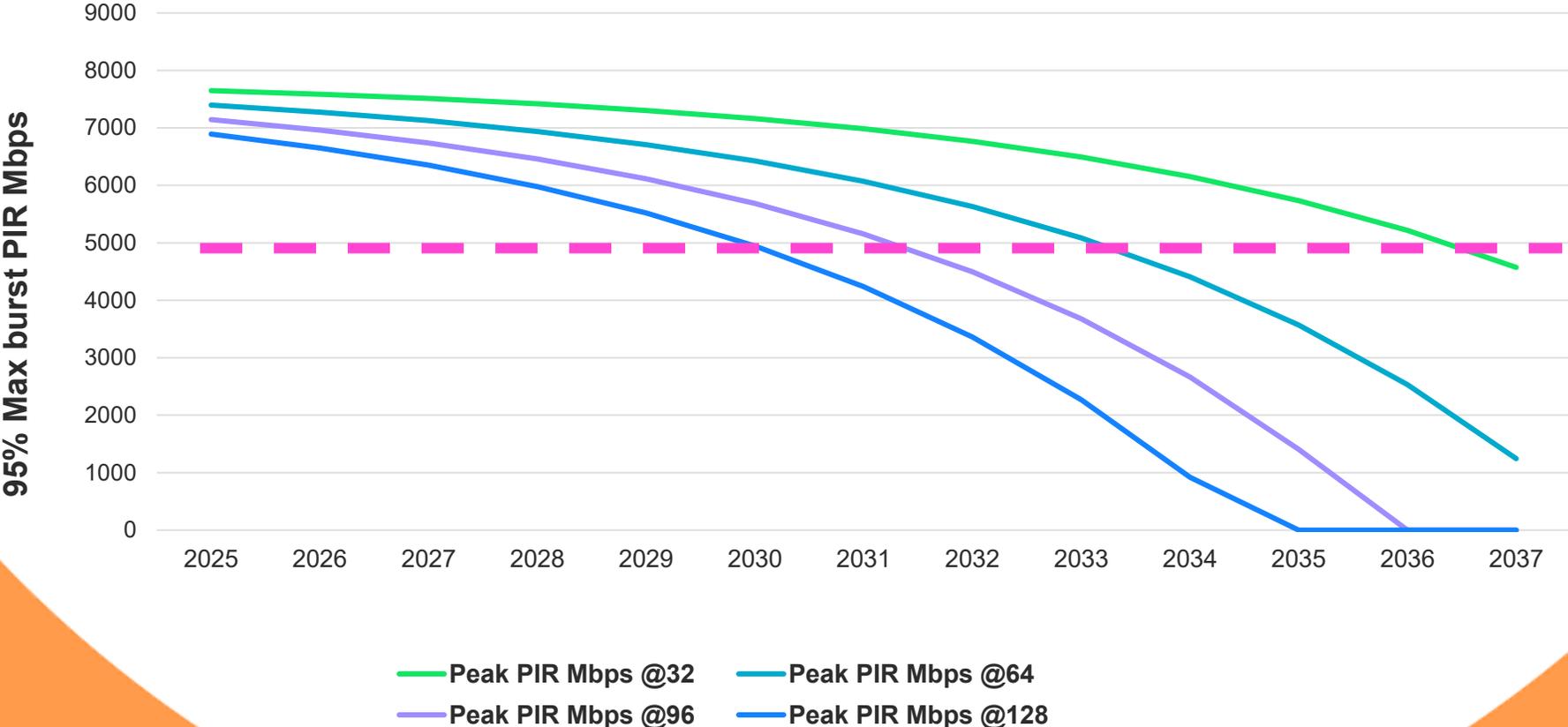
HAPTIC FEEDBACK



CITYFIBRE IS ALREADY PLANNING FOR THIS FUTURE

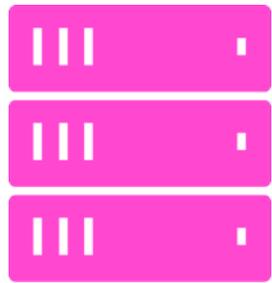
Thinking beyond XGS-PON to the network technology that will turn exploration into reality

PEAK INFORMATION RATE (PIR) OVER TIME



INFORMATION IS POWER!

Sharing our fibre network's 'up to the millisecond' monitoring data matters to ISPs



**CITYFIBRE
NETWORK**

- Unlike copper, PON networks communicate constantly
- Know – in milliseconds – if things go wrong
- See a premises become RFS in real time

← **FIBRE & MONITORING** →



**CUSTOMER
SITE**



← **INFORMATION** →

- Shared info gives ISPs an up-to-date view of the service
- ISP provides accurate information direct to their customer
- RFS data enables ISP to auto-trigger targeted marketing



THE DYING GASP

- ✓ We know the difference between power and fibre failure
- ✓ We can see and correlate faults for a whole street/area. Unlike an ISP that can only see a few homes

'READY' AT CITYFIBRE MEANS "READY – RIGHT NOW"!

Not: tomorrow / next week / if / when.... or some other excuse....

WE BUILD TO THE EDGE OF EACH PROPERTY



Intelligent testing with Visual Automation Technology proves our ability to connect right first-time 95%+ before we release it as RFS.

THIS MEANS...



Our install date is guaranteed to be faster than our ISP partners ship their CPE



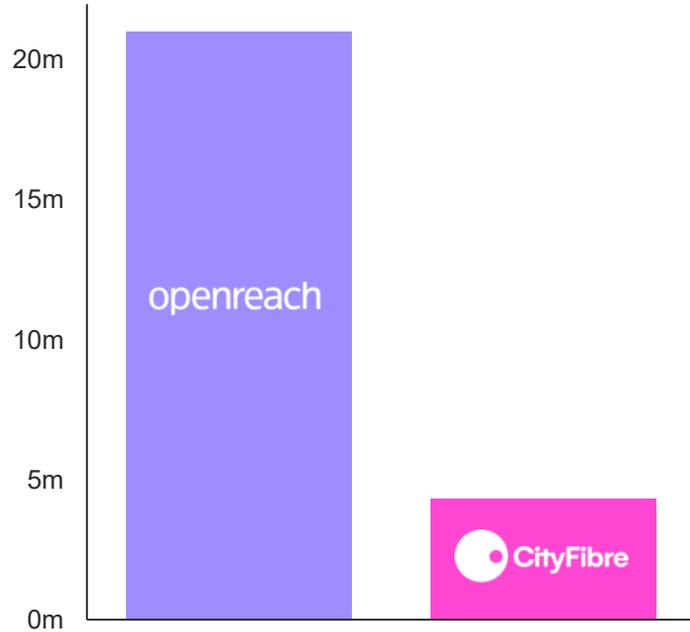
On the day customer experience is smooth with no surprises = positive word of mouth



Rapid, on time installation timelines = more installs a day & lower cost to serve.

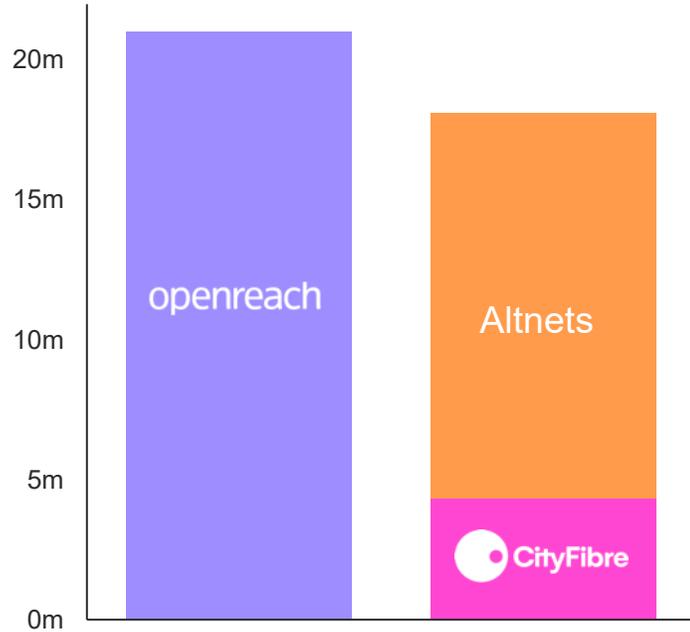
M&A WAS ALWAYS ON THE CARDS

HOMES PASSED (M)



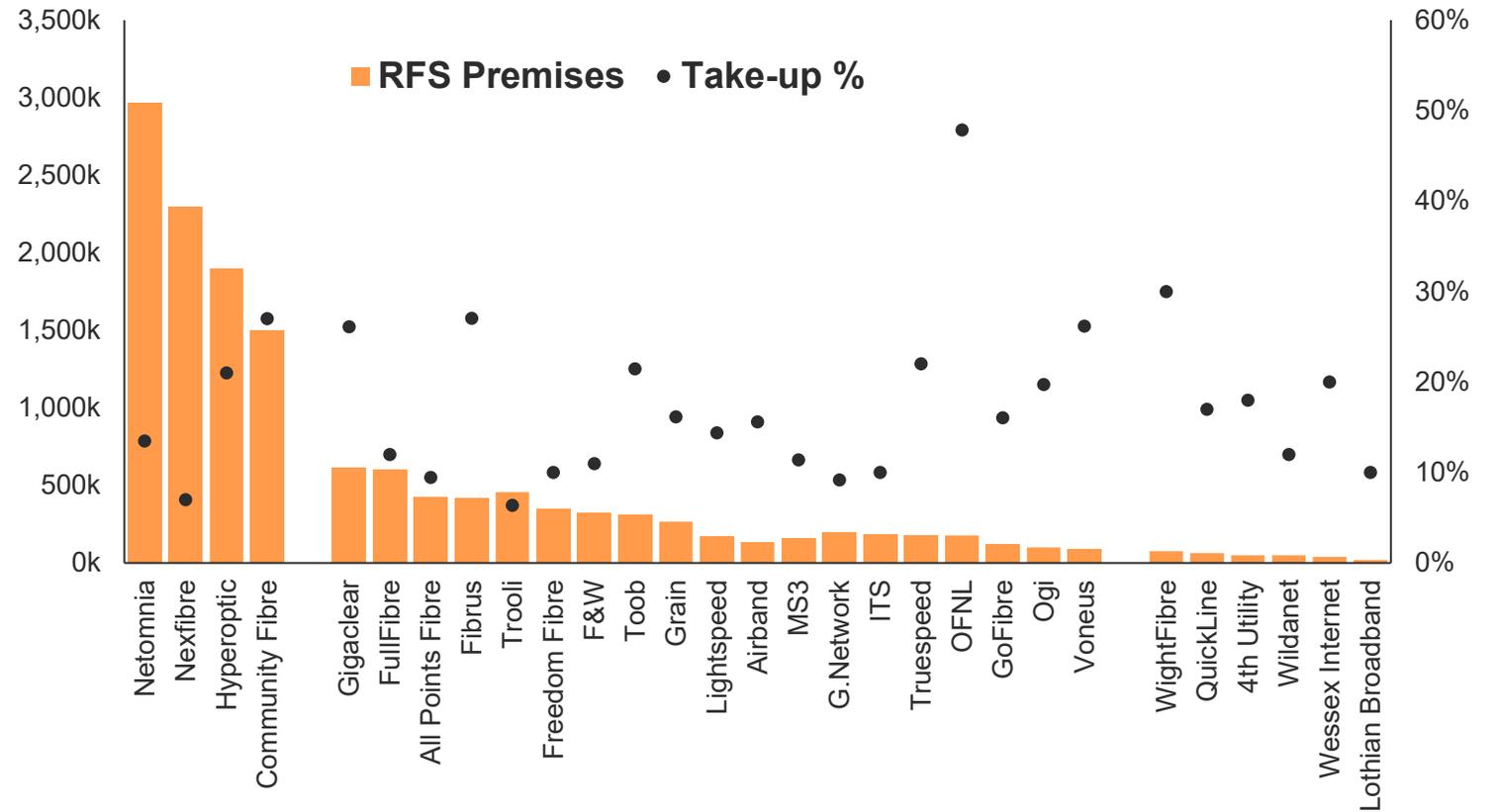
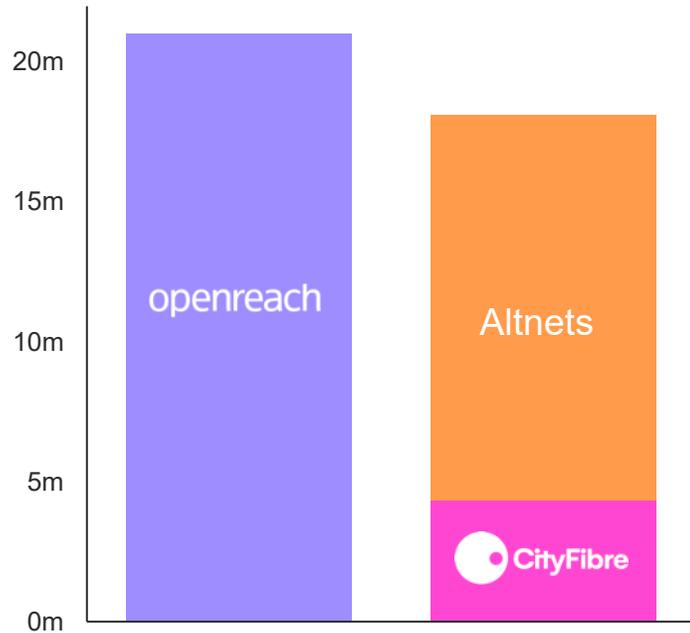
M&A WAS ALWAYS ON THE CARDS

HOMES PASSED (M)



M&A WAS ALWAYS ON THE CARDS

HOMES PASSED (M)



FROM BUILD TO LIVE SERVICE – WHAT WE DO MATTERS

 Every engineering decision leads to real customer outcomes

 Being deliberate over the long term delivers value

 Ensuring our network is the number one choice changes the UK

CITYFIBRE HOLDS THE KEY TO A SUSTAINABLE COMPETITIVE UK MARKET

openreach	100% coverage
	50% coverage
	30% target



SO, WHAT'S NEXT?

KEEP EXPANDING OUR NETWORK

Expand our
wholesale-only
network to more than
8m UK premises

KEEP DRIVING TAKE-UP

Drive take-up across
all market verticals –
residential, business,
public sector and
mobile

ALWAYS LEAD THE MARKET

Deliver market-leading
products and services
across the UK's most
advanced full fibre
network





Thank you for your attendance

Future IET Anglian Coastal Local Network events:

- 18 March 2026 (hybrid), **The history of text messaging**, Kevin Holley, Industry Standards Director, Distinguished Engineer, BT
- 23 April 2026 (online only), **The Cavity Magnetron**, Prof. Peter Grant, Emeritus Professor, The University of Edinburgh
- 20 May 2026 (visit), **Bawdsey Radar Museum**

For more details and how to register please visit:

<https://engx.theiet.org/local-networks/ea1>

Event CPD Certificate and Slides/Video (subject to permission) will be available on this site.

Anglian Coastal

The volunteers of the IET Anglian Coastal Network organise events and other activities covering engineering and technology topics for engineers and also members of the public who have an interest in engineering and technology. Even if you're not a member of the IET, you're still welcome to join us at any of our events.

We cover the areas of Norfolk, Suffolk and north Essex. Over the past few years we have organised a large number of highly successful Webinars when face-to-face meetings have not been possible. We are now able to resume face-to-face events. We aim to retain many of the benefits of the Webinar format where practical. Most of the lecture events will be hybrid offering both face to face attendance or online options. We also organise occasional visits to places of engineering interest (e.g. Bentwaters Cold War and Bawdsey Radar museums).

Breaking News (New feature!)

Before our next event **Dave Milham** reflects on his 55+ years in telecoms, spanning roles at GPO, BT, and the TM Forum, as well as contributions to IEEE and European R&D projects. His **upcoming talk on 14th January 2026 will cover the evolution of telecom operations and the impact of AI**. Please read the interview that Dave did with our own George Williamson (see PDF below).

We have launched our own YouTube Channel which we will use to publish videos of our events (subject to speaker permission). Do check it out if you have missed a previous event.

Was this helpful?
Yes (28) No

In this Article

- Breaking News (New feature!)
- Blogs and Articles (New!)
- Contact us
- Car parking in Ipswich (face to face event)
- Foothold (needs your help)
- Watch one of our event videos
- CPD Certificates for our events
- Previous event information (slides and videos)
- Our committee

Created over 4 years ago
Updated 12 days ago

Upcoming Events

- From Advice Notes to Intelligent Automation
14 Jan 2026 7:00 PM to 8:30 PM
- City Fibre is rolling out gigabit-speed connectivity to 8 million premises
24 Feb 2026 7:00 PM to 8:15 PM

