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INTRODUCTION

Following his re-election in May 2021, Mayor of Greater Manchester, Andy Burnham, announced ambitious plans for Greater Manchester to become one of the first city regions in the world to equip all households, over-75s and disabled people with the skills, connectivity, and technology to get online.

As part of his reinforced commitment to get residents online, he established a Digital Inclusion Action Network. The aim of this Action Network is to lead targeted action to combat digital exclusion with a specific focus on supporting under-25s, over-75s and disabled people in Greater Manchester.

“If Greater Manchester is truly going to be a world leading digital city region, we have to make a big commitment to get everyone online. We need to provide the consequences of not doing so are severe – with our people at risk of further social isolation, lack of equal opportunities and not being able to access support.”

Andy Burnham, Mayor of Greater Manchester

Acting on this pledge, the Greater Manchester Combined Authority (GMCA) launched a series of pilots including the Social Housing Digital Inclusion Pilot.

Background to the GMCA Social Housing Pilot

The Social Housing Digital Inclusion Pilot represents one of the largest attempts of its kind undertaken in the UK. This pilot started in September 2022 and sought to link up to 5,000 households, across five Social Housing Providers (SHPs), with five Internet Service Providers (ISPs) in doing so, by establishing a partnership between the public and the private sectors, it aims to explore what socially and economically viable options for social tariff and digital inclusion support (including equipment, access, and training) may exist for social housing tenants. Partners on the pilot project include: Public sector partners: • GMCA • Wythenshawe Community Housing Group • Bolton at Home • Stockport Homes • Wigan and Leigh Housing • Southway Homes

Private sector partners: • Virgin Media O2 • Hyperoptic • BT/Openreach • TalkTalk/Freedom Fibre

Vodafone

Led by Professor Simeon Yates, this collaborative research study between the Digital Media and Society Institute and the Haselline Institute, both at the University of Liverpool, was conducted with a view to analysing outcomes from the pilot project, identifying key points of learning, and considering what these might mean for future projects of this type.

Why social housing was selected

The digital exclusion challenge is greater for people living in low-income households, including social housing tenants. We estimate that 55% of social housing tenants (500,000+ people) are digitally excluded in some way.1 With one in five residents in Greater Manchester living in social housing,2 exploring models that address barriers and improve take-up and outcomes for people in social housing should make a significant impact on reducing digital exclusion for the region.

This approach was chosen as social housing providers are trusted organisations with a strong commitment to supporting tenants in ways that go beyond their landlord/ tenant relationship. This includes things as employability, addressing loneliness and health. The majority of social providers are well integrated with community partners, support groups and local authorities, with a willingness to stimulate digital inclusion through existing and new initiatives.

Conversely, ISPs have traditionally struggled to engage with social housing providers in advancing the rollout of full-fibre investment and there are significant gaps in high-speed connectivity coverage in social housing in Greater Manchester. Therefore, bringing these organisations together could potentially benefit both, while achieving better outcomes for tenants.

Pilot project aims, objectives and framework

GMCA wanted to understand to what extent it is possible to create a sustainable model for digital inclusion in social housing, while working with the market to understand the optimal conditions for this to happen. To try to find the answer to this, GMCA developed the logic model for the project (see Figure 1). The overarching aims for the project are:

1. To lift people out of digital exclusion
2. To improve what the role of the social housing provider is when working with the ISP and the local authority needs to be to make a model work.
3. To determine the extent to which a viable commercial model is possible through demand aggregation which is both attractive enough to tenants to go to the local ANCs and could enable recycling of some revenues to support the digitally disadvantaged.
4. To determine which solutions deliver the best outcomes for our target digitally excluded groups (over 75’s, disabled groups and young people) – and where other public funding interventions may be required.
5. To shape the optimum model for GM Wide Rollout – including standardising ways to maximise investment and competition.

Figure 1: Logic model (GMCA)

In social housing through a demand aggregation model.

1. To determine what the role of the social housing provider when working with the ISP and the local authority needs to be to make a model work.
2. To determine the extent to which a viable commercial model is possible through demand aggregation which is both attractive enough to tenants to go to the local ANCs and could enable recycling of some revenues to support the digitally disadvantaged.
3. To determine which solutions deliver the best outcomes for our target digitally excluded groups (over 75’s, disabled groups and young people) – and where other public funding interventions may be required.
4. To shape the optimum model for GM Wide Rollout – including standardising ways to maximise investment and competition.

The research question

The Greater Manchester Social Housing Pilot then explored the following research questions:

1. To create a long-term sustainable model to address digital exclusion

2. To what extent is it possible to create a sustainable model for digital inclusion in social housing, while working with the market to optimise the conditions for this to happen?

The pilot has very much stressed this question as we will report below. In doing so, it has clearly identified the limits to which market response (e.g., from ISPs) can deliver digital inclusion (see Section 5.3.6 and Section 6.1.3) it has also identified areas where regional and devolved government can help to improve conditions (see Section 8.2) as well as highlighting issues for national policy

National context

In the broader context of digital inclusion, much research has been undertaken on the demographic predictors and consequences of digital exclusion. The challenges of digital exclusion and inequalities are not new. Evidence from research and intervention11, much of it from research and practice teams, point to a complex interplay between levels and types of digital and social inequalities. Digital inequalities encompass differences, lacks and limitations in access, skills, and capabilities with regards to digital systems that have significant tangible consequences for citizens, households and communities. Those most disadvantaged have the potential to continue to lose out further. The COBIS and the UK current cost-of-living crisis reveal absolute digital exclusion where already vulnerable individuals find themselves significantly disadvantaged – socially disconnected, economically struggling to access benefits or government assistance, or make online payments. They also reveal the complexity of relative digital exclusion, making visible the challenges faced by ‘limited users’, those millions with access who yet fail to fully benefit from access to digital systems because of lack of skills, support and capabilities. Previously documented evidence showed that the opportunities and abilities to utilise digital tools to work from home1 or provide educational opportunities12 are inequitably distributed.

1 According to analysis of Ofcom Tech Tracker data conducted by Prof. Simeon Yates, 55% of people renting from a Local Authority, Housing Association or Housing Trust in the North West of the UK are Non-Users, Very Limited, or Limited Users of digital systems (whether accessing these via a home broadband connection or through digital means) with a significant percentage of those low-income (and poorly educated) households.

The three key components of the MDLS (see Figure 3) clearly complement the findings presented later in this report:

- **Digital goods and services**
- **Practical and functional skills**
- **Understanding and managing digital risk**

One of the key findings from MDLS is that access via a mobile phone is not enough, as there is no reasonable level of digital inclusion that requires both mobile data and broadband access. Though mobile access with sufficient data is necessary, it is not sufficient to sustain reasonable digital access and opportunities.

**Research study aims and objectives**

The University of Liverpool was commissioned by GMCA to undertake an observational and reflective study of the social housing digital pilot. Led by Professor Simeon Yates, the aims of the research project were to undertake the following:

1. **Initial assessment of digital access, skills, and community support for each area**, including new survey data and administrative data
2. **Qualitative exploration of impacts of digital exclusion in target communities and observational and ethnographic documentation of the programme set-up and implementation in each target area**
3. **Quantitative assessment of the uptake of the programme and demographics of households**
4. **Qualitative examination of household and community experience of programme participation**
5. **Qualitative and quantitative assessment of digital exclusion factors in each area**

As we will note in the report below, the material circumstances of social housing tenants and the pressures on frontline staff impacted the ability to collect data in some contexts. Though this has limited the research overall, it is itself a key learning point. Digital inclusion projects undertaken in social housing contexts are taking place within an already complex service delivery environment. Both housing tenants and housing providers are under a range of personal and organisational constraints. These conditions had a key impact on both the delivery of the intervention and the ability to document this at scale. As a research team, we are very keen on stress that our descriptions and discussions of the challenges and limitations of the pilot are not to be read as criticisms for three reasons. First, as is evident in this report, all parties made best if not sterling efforts to make the pilot a success. Second, this was a very ambitious pilot and was undertaken in part to identify, address, or propose solutions to the issues encountered. In this respect, we assess the pilot to have been very successful. Third, the literature associated as part of the COVID-19 pandemic was still in flow and has continued through the current cost-of-living crisis. This has placed significant strains on the participating organisations but also created a very different context than was in place when the pilot was planned.

**Methods**

This study adopted a mixed method approach. Both qualitative and quantitative methods were deemed suitable, given the nature of the project, to explore the breadth and depth of the social housing digital pilot. The research design and fieldwork were carried out by the research team from the University of Liverpool and followed an iterative process, informed by periodic discussions with GMCA and SHPs. As part of this project, the research team also committed to holding regular sessions to share the findings, which were convened by GMCA and were open to organisations from within and outside the city region. After conducting a review of relevant literature, fieldwork took place from November 2022 to April 2023, across the areas included in the pilot project. In terms of data collection, the methods used were:

1. Semi-structured stakeholder interviews (n = 16) – these were conducted and recorded online via Zoom or Microsoft Teams, with three representatives of local authorities, five SHPs from each of the five areas, taking part in the pilot project and six SHPs. Interviews were 45 minutes to an hour long and interviews were followed by an interview schedule devised by the research team. Interviews were recorded via Zoom or Teams, transcribed using Otter.ai and anonymised.
2. Focus groups with tenants, in groups of between two and eight – these were conducted in December 2022 with tenants recruited by the SHPs that were part of the Digital inclusion pilot. Focus group discussions were held in community centres and at Bolton at Home offices. Timings were between 30 minutes and an hour. Interviewers loosely followed an interview schedule devised by the research team and conversations were allowed to reach an end organically. Focus groups were recorded via Dictaphone, transcribed using Otter.ai and anonymised.

A minimum digital standard of living includes, but is more than, having accessible internet, adequate equipment, and the skills, knowledge, and support people need. It is about being able to communicate, connect, and engage with opportunities safely and with confidence.
not requested as part of the consent process). To raise awareness of this project, members of the research team attended activities within SHPs’ local communities with the aim of recruiting participants for the focus groups. Participants for the telephone survey were recruited with the support of the SHPs. Textual data from interviews and focus groups was transcribed using Otter.ai and anonymised, then four members of the research team coded the data and conducted qualitative analysis using NVivo. The team coded the data thematically using three sub-categories: ISPs, SHPs and tenants. Themes were derived from the data and analysis was conducted iteratively through regular meetings, discussions and note-taking by the research team. Survey data and national datasets were analysed using SPSS and R.

GMCA TENANTS COMPARED TO UK DATA

The survey data looked at a range of issues:
- Comparison to national datasets
- Views on social tariffs

Comparison to national data
A key argument for this project is the link between being a social housing tenant and being offline. We have therefore compared regional data with national trends to confirm that this holds for GMCA. Overall, the survey data present a very similar picture to that nationally across a range of key measures:
- Being totally offline
- Age
- Health and disability
- Device use
- Dependence on mobile (data) access to the internet (rather than broadband)

Social housing non-users
Levels of non-use, never going online or using the internet in the UK currently stand at about 8% of the population. Analyses of the Ofcom 2023 Tech Tracker data puts the percentage of social housing tenants in the UK who are non-users at 13%. The GMCA survey data puts this number even higher at 23% for GMCA social housing tenants.

Age
As with national figures, age is a key predictor of being fully offline for those in social housing (see Figure 4). Non-users in GMCA and nationally, who are in social housing, are more likely to be older (56+). Though it is a key predictor nationally, it is more pronounced for those living in social housing in both GMCA and UK as a whole.

Health and disability
A similar pattern can be found in GMCA as nationally, with those social housing tenants declaring a disability or limiting health condition being more likely to be offline (see Figure 5).

Device use
Similarly, GMCA social housing tenants, like those in the wider UK, are more likely to be smart device (phone or tablet) users or have no devices (see Figure 6). A larger proportion of GMCA social tenants had ‘no device’ (25%) compared to the social tenants in the UK as a whole (13%). A similar proportion of GMCA tenants are smart device (phone or tablet) only users (4%) compared to the national social housing tenants (4%). A deeper analysis for GMCA residents indicates that:
- Over 75s are least likely to have a smartphone, under 56s are more likely.
- Hardly any respondents of any age or backgrounds have PC/Desktop.
- Those 36 or older are more likely to have a smart TV.
- Those over 56 are unlikely to have a laptop.
- Overall, less than 50% of all respondents have a laptop.

As with the national picture, social housing tenants are unlikely to have the digital equipment to best support access to services (tablet or laptop) or to support access to employment opportunities and skills (laptop).

Figure 4: Stacked Bar Percent of Age and Internet use (Top: GMCA, Bottom: UK)
- Tablets are more common across all age groups.
- Over 50% of people in the 26–35 age group have a tablet device.
- 15% of residents are smartphone only users.
Broadband vs mobile data access

GMCA residents in social housing are slightly more likely to be accessing the internet on mobile data only plans (28%) as compared to the broader national picture (24%) (see Figure 7). However, this has to be assessed in the context of higher numbers of overall non-users.

Overall comparisons

GMCA social housing residents appear to have a similar profile to national residents. In particular:

- Older users are less likely to be online.
- Those offline are more likely to have a long-term health condition.
- They are very likely to have no digital devices or to only have ‘smart devices’ (smartphone, tablet).

Given the similarities to the national picture, we can infer several further features of social housing tenants in GMCA. First, like their national counterparts (see Figure 8), GMCA social housing tenants are more likely to be Limited or Non-users of the internet and digital services. Limited users are those with very low probabilities of undertaking any of the 18 internet activities measured by Ofcom in their Media Literacy and Tech Tracker surveys. These include such things as online banking and shopping, using local and government services and the use of social media. Second, they are very likely to have low digital literacies, low awareness of good cyber security practices and limited knowledge of how contemporary digital platforms work. This puts them at a greater risk of online harms, misinformation and scams.

Conclusions

From this analysis we can conclude the following:

- Social housing both in the UK and GMCA is a key context in which many residents are more likely to be fully digitally excluded or Limited digital users.
- GMCA social housing tenants appear to be slightly more likely to be offline or only have mobile access compared to social housing tenants in the UK as a whole.
- GMCA social housing tenants who are Non-users have a similar profile to UK social housing tenants in regard to age and health status.

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As we also note below (see Section 6.2), Non-users in the UK have fallen from 20% in 2010-2013 to 8% in 2023. Fully offline users are now some of the most vulnerable older (though not all) people in the UK, often with very low incomes. A larger group often in social housing are people who use the internet in limited ways, may have intermittent access, and have low digital skills. These results emphasise the importance of social housing as a key context where digital inclusion interventions are both acutely and chronically needed.
INTerventions

The interventions in each area are described in Table 1. We would note that the rollout of the interventions took place at different rates and times with breaks and some reorientations as the project progressed. As will be explored later in Section 5, some of these delays arose from the complexity of delivering these interventions. One ISP noted:

ISP: Reflecting, it took too long for us to be able to get everything pulled together. We were slightly later in being able to deliver than we would have liked and a number of reasons for that was to do with process and legal requirements and then actual delivery requirements which we’re still challenged with at the moment. The project has been complicated, but it’s not been about the people. It’s just about the processes and the levels of additional requirements that we need to do to each to meet the conditions of the SHP.

Table 1: Interventions

<table>
<thead>
<tr>
<th>Area</th>
<th>ISP</th>
<th>Offer of connectivity</th>
<th>Digital training</th>
<th>Target number of residents</th>
<th>Uptake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bolton</td>
<td>Hyperoptic</td>
<td>Social tariff of between 15 and 25 GBp, depending on a package of their choice, or a special offer of 5 GBp a month</td>
<td>N/A</td>
<td>1000</td>
<td>52</td>
</tr>
<tr>
<td>Southway</td>
<td>Vodafone</td>
<td>Free data sim packages to 1000 social housing residents for six months. Due to restrictions on the amount of data offered (i.e., 20 GB per month), 596 residents did not take up the offer and those who were already in contract with a different provider decided to remain with them. By contrast, the rest of the residents took up the offer, with 404 being the final uptake figure. After six months, these residents were given the option to have the same amount of data for 5 GBp a month on a rolling contract.</td>
<td>N/A</td>
<td>1000</td>
<td>404</td>
</tr>
<tr>
<td>Stockport</td>
<td>BT</td>
<td>Social tariff and connection of two community hubs for six months. Worked with Starting Point, which provided basic digital skills training to some of the residents. BT contributed to Starting Point a six-month payment for the delivery of this training. No data is available about the number of residents in Stockport who took the special tariff or training.</td>
<td>N/A</td>
<td>1000</td>
<td>N/A</td>
</tr>
<tr>
<td>Wigan</td>
<td>TalkTalk</td>
<td>Planned offer of connectivity and connection of community hubs but intervention never took place</td>
<td>N/A</td>
<td>1000</td>
<td>N/A</td>
</tr>
<tr>
<td>Wythenshawe</td>
<td>Virgin Media O2</td>
<td>Planned offer of connectivity and connection of community hubs but intervention never took place</td>
<td>N/A</td>
<td>1000</td>
<td>39 (took up the connectivity offer), 138 (were supported by digital training)</td>
</tr>
</tbody>
</table>

1. At the time of the pilot Vodafone offered 200Gb of data per month. After the pilot, their offer increased to 400Gb of data and this is currently provided in the National Databank programme.
In the following section of this report, we set out the findings from our qualitative research undertaken with the three sub-categories used in analysis:

- Social Housing Providers (SHPs)
- Internet Service Providers (ISPs)
- Tenants

**Social Housing Providers**

The data from SHPs fell into three thematic areas:

- Digital inclusion activities
- Situating digital inclusion within social housing provision
- Working in partnership

**Digital inclusion activities**

Prior to the beginning of the pilot, all the SHPs we spoke to had already been providing some form of support to get tenants online.

These included community-based interventions with names like ‘Silver Surfer’ and ‘Tech and Toast’ sessions, aimed at helping older people and the wider community to improve their online skills and confidence.

In addition to this, all offered some form of “Community Online Group” which focused on supporting online access and making the most of digital technologies and devices. These often provided ad hoc informal support, for example with filling in forms and accessing databases.

SHPs and SHPs described the kinds of initiatives they had in place before the pilot started:

- **SHP1**: We do laptop loan schemes which is you know free equipment for tenants, free tablets for tenants. We probably have about 100 in circulation six months on they return them six months and then six months off. So, they have a six-month period where they can’t load it again because so many people want to use it.

- **SHP4**: I do laptop loan schemes where we loan them flat-screen TVs for six months. They have the opportunity to opt out. As wrap-around support, they turned a void property within the block into a temporary training/digital support hub.

Additionally, throughout the pandemic, SHPs had played a key role in their communities, playing an integral role in the distribution of SIM cards, devices and IoT devices. These often provided informal support, for example with tea parties, then giving out free to tenants.

Providers hoped that by being part of this pilot, learning could be shared which would help them plan future service delivery.

**Situating digital inclusion within social housing provision**

SHPs are ideally placed as support infrastructure to improve uptake and participation in schemes such as this pilot project. They have existing long-term relationships with local communications and are cognisant of specific tenants’ needs, allowing for localised and tailored approaches to digital inclusion support. As well as providing housing, SHPs are often engaged in other activities and schemes to support tenants such as the pilot project which could become another ‘business as usual’ facet of delivery embedded in wider strategies around tackling poverty and social inclusion.

However, delivering such activities alongside their core work is often difficult. While SHPs were enthusiastic about the possible benefits of the pilot project and its potential positive outcomes for tenants, capacity in the social housing sector is always stretched, and our interviews came at a time when many colleagues within SHPs were also delivering initiatives in response to the cost-of-living crisis including warm hubs and community food provision.

The complexity of their everyday work meant that SHPs valued the intervention of the OMCA social inclusion pilot. The role which OMCA took in convening the relationships with the ISPs was seen by SHPs as deeply valuable, allowing them to share their experiences of things that their senior teams that can influence the development of social tariffs, deployments of technology (e.g. cobbling) and sharing expertise.

**Working in partnership**

At the heart of the pilot is the partnership between OMCA, SHP and ISP (private) sector partners, which to our knowledge is one of the first times this scale has been trialled in the UK.

Our interviews pointed to SHPs and ISPs having a shared understanding of the need for social housing tenants to digital inclusion. These included issues related to costs, infrastructure and sustainability. The issues of capacity mentioned above emerged both as a talking point in interviews with SHP stakeholders and general issues of engagement within the project as noticed by the research team.

Our discussions with colleagues from the SHPs pointed to there being no one “natural” home for issues related to DI within their organisations. This is a persistent finding across many organisations where digital inclusion, being a multifaceted issue cutting across functions, may lack a clear home. Often, it may be placed within one ‘leg’ or function of the organisation.

In our research around GM-OMCA, we found digital inclusion work being led from adult education, infrastructure, community development and tenant engagement sections. In no case was this led by a senior member of the organisation (board or senior leadership team). Colleagues were therefore required to work both up and down the organisational hierarchy to cross silos. To successfully deliver this project, colleagues needed a broad overview of individual tenants’ services including legal, IT, training, facilities management and tenant engagement. Unsolicited communication was sometimes slow as responsibility was not always clear, and messages passed through several people during a finding in the tenants being an appropriate person or receiving the appropriate approvals.

As one of the ISPs noted:

**ISP1**: What typically is that the benefit of digital inclusion sits in one part of an organisation because it’s going to affect the tenant and your rental pounds. The challenges sit somewhere else because asset management at the moment want you to poke a hole through their fire stopping and they’re going do a refurb or you know, all of that stuff and you can be gatekeepers, what you need to do is to make sure you’ve got all the right stakeholders have been brought together, they understand the whole picture, in order to be able to manage that benefit delivery.

Issues of capacity also arose relating to staffing numbers. While SHPs were committed to making this pilot work, staff capacity was insufficient to allow for the development of relationships properly and fully with ISPs.

The successful delivery of projects of this type is dependent on good lines of communication which determine success and take up of interventions. Further clarity around lines of communication, both within the partnership and with tenants, required further consideration from the onset of the project. Notably, there remained the challenge of providing long-term digital support to tenants due to financial restrictions which is often fixed with sustainability remaining a key issue. Moreover, the cost-of-living crisis to consider, a focus must be on making fixed term contracts sustainable.

**Key takeaways**

- Though all the SHPs recognised the considerable importance of digital inclusion, this was just one of many pressing issues.

- While all SHPs had someone with responsibility for digital inclusion, they were not in a significantly senior position within the organisation.

- Resourcing of digital inclusion activity was varied across the SHPs. Only in a few cases did the digital inclusion lead have clear departmental and resources to draw upon. In other cases, they were part-time responsibilities working up, down and across the organisation.

- SHPs’ interventions appear to have been across the full range of infrastructural and tangible digital support. Often these have been targeted at specific properties or tenant groups (e.g., older people, job seekers). Very often interventions have been time limited and dependent on short term or siloed funding (e.g., infrastructure, education).

- Connecting with ISPs was complex, and SHPs and ISPs may have found it challenging working across two different organisational structures and approaches.

- Throughout the project, the research team observed and noted the considerable pressures that the aftaffects of COVID-19, the cost-of-living crisis, and limited resources created for SHPs partners when trying to deliver the project. It was often the most important or critical activity that needed to be addressed by the SHP teams.

**Residents’ perspectives**

The other element of this study was the research team’s engagement with social housing tenants. These were in the form of focus groups consisting in groups of between two and eight digital champions, to facilitate an open-ended discussion, a semi-structured interview schedule was used for these. In addition to those focus groups facilitated by the research team, SHP4 conducted their own sessions and provided feedback. Even though these sessions provided insights into tenants’ needs and information, overall recruitment levels were low, and some sessions were poorly attended. The numbers invited was 36, with only 12 people invited. This was despite extensive efforts by SHPs to recruit participants, which included:

- The challenging circumstances tenants find themselves in – motivation to take time to attend a focus group session may not be very high.

- SHPs were undertaking this recruitment on top of existing challenging workloads. During the focus groups with social housing tenants, a range of issues were discussed, including access points, reasons for using the internet, awareness of providers/social tariffs, costs and digital inclusion and confidence (digital literacy). We would note that the participants’ levels of digital engagement and awareness in the focus group sessions were not as high as those by the research team to be higher than the overall figures presented in Section 3 above, though many of the points made would align with the survey data.

**Use of the internet**

In line with Section 3 above, participants’ use of the internet was mainly via phones and laptops. Key uses were for work and leisure such as online shopping, entertainment, work, utilities, social media, learning languages and searching for information. Again, in line with the survey results, participants particularly commonly used the internet for work, which is very useful for social activities. For example, one participant commented that: ‘If you’re basically staying at home you might as well use your phone to connect with old friends and using forums:’

**FO2:** I find it very, very helpful in terms of reconnecting with old friends and stuff like that... but also things like forums...Facebook, international accessibility, and forums within which, in other words, the specific threads which focus groups most participants access the internet at.
Broadband and mobile access

Those participants who we spoke with were mostly happy with their broadband and data packages. A key group with concerns about their internet provision were the young respondents (18-25) whose access was smartphone focused, and therefore, having enough data at their disposal is essential. This sometimes meant being dependent on using or sharing their relatives’ data. Also, Wi-Fi access was provided either by their parents or by their landlord. Limited data for their phones meant that they rely on Wi-Fi at home for sustained smartphone use, and this is a concern in which these young people access the internet via specific locations that often have free Wi-Fi access (e.g. supermarkets, libraries and at their colleges). Bases were mentioned as one of the locations where the students had free Wi-Fi access. Many participants mentioned the adoption of strategies such as turning their data off after a certain time of day, so in some cases, in which they have away from home without any data or when their data runs out.

Social tariffs

Few participants knew about social tariffs, and those who knew about them were not necessarily who they are targeted to people on specific benefits, rather than those on a low income: People like myself will fall through, New York: Palgrave McMillan.

Digital skills

In general, participants in the focus groups felt confident in their digital skills. However, as noted above, many were self-selecting in response to SHP recruitment and appeared to have engaged with digital training and support provided by the SHP. Most participants were self-taught or taught by friends and family. Some had also attended some formal training:

FG2: I’ve learned a lot myself. Yeah, but I’ve done training courses.

They often learned through interaction with family (e.g., grandparents) and friends. This reflects repeated findings in other studies where individuals’ local personal networks are key to their digital literacy.

FG5: I think I just gradually learned myself because it wasn’t like one specific person who taught me how to use it but think combining it with school, like my dad maybe pushed me in the right direction.

However, there were participants who recognised their difficulties in interacting with digital services.

FG3: I don’t like computers particularly. For a start when I tried to do anything on a computer like uploading stuff, the sort of message that they would say then was like, you know, the score, but also people that would abuse and exercise any single sort of situation. But there’s also the element of... you know the general engagement. So I think you can somehow protect yourself from it.

Regardless of suitability of devices, discussions indicated that participants did not have the right device for the task they needed to do. For example, in the quote below, one participant had to take the time to read the small text on their phone. They also mentioned that they use their laptop for internet banking and only use their mobile phone for verification purposes.

FG2: So I’m using a phone, which I find very difficult to see the tiny text on a small phone, but I don’t do it on the phone, but I will on the computer. Okay, so... Internet banking... I then get picked up on the phone, just to confirm that, it’s me and then go back to the laptop.

Our discussions showed that the internet is not just necessary for accessing services but, more fundamentally, it provides individuals with an equal footing in society.

FG3: Exactly. It’s an equaliser for independence.

Awareness of digital service provision

There was an awareness amongst the participants that there is a shift towards a digitalised society, and there was a risk that, without targeted support, some groups might be left behind.

FG3: A big risk for the older generation and I still think some younger people with learning disabilities are partly disconnected, they’ve not necessarily got the vocabulary skills and reading skills, the right type of skills. Where maybe the phone anxiety is to digitalisation. How can you know how they’re gonna survive... if they’re going to be encouraged to try and lead some kind of independent like?

The internet also comes with risks including scams, online abuse, and internet addiction, as shown in the quote below. One participant, when questioned as to why they joined Facebook, described that she did so due to the abuse that her daughter had experienced:

FG2: There’s an element of the internet not being very safe in itself because, obviously, then people can, you know, try and either rip you off or like, you know, the score, but also people that would abuse and exercise any single sort of situation. But there’s also the element of... you know the general engagement. So I think you can somehow protect yourself from it.

ISP views

Each of the participating ISPs along with GMCA were interviewed about the issues, challenges and opportunities provided by the pilot project. We have looked at a round number of key topics within the interviews:

Motivation for being part of the pilot

Despite the challenges we will outline below, all of the ISPs were motivated to be part of the pilot:

ISP1: It is about being part of a solution to an evident problem, seeing what we can do as an organisation to support our local communities and be a good corporate citizen essentially.

ISP2: I think it was a really interesting opportunity to bring people together in a very different way and it has its challenges, but it was an opportunity to think about it differently, and I think even now moving forward, we still need to have an ISP to day-to-day business and engagement, so understanding the space and the customers are really important to us because we’re here to try and give an excellent customer experience and that’s what we want to learn from engaging with the space to be able to continue to support.

ISP3: [...] we do need to act for all groups. Different groups have different needs.

ISP4: One of the biggest challenges that we face in the UK is actually being able to multi dwelling units, whether that be...
through social housing or commercial provision. We tend to get slightly more traction, whether it is social housing related, because there’s a need and a desire to improve the services [...] for those either vulnerable people or people that are residing [...] there.

Importantly, the ISPs were aware that these issues were prevalent in the social housing sector:

ISP1: The focus for us is really on that. It’s about driving the maximum level of connectivity. And I would say the housing portfolio we have is not the easiest portfolio that we could have got out of all the mix. It is not the easiest buildings to navigate. They’re certainly not new buildings, they’re quite old. From a cost point perspective, costs are quite significant for any commercial provider to manage. I think from a pilot point of view it’s interesting but there are cost points that we have to consider in the mix as well.

Working with the SHPs and GMCA

All the ISPs noted issues and challenges working with the SHPs. They clearly articulated this in terms of a ‘contrast’ in working cultures and available resources. The ISPs all noted that they found the SHPs decision making and implementation processes much slower than they were used to dealing with. This was not raised as a criticism but as a realisation that they were working with lower resourced organisations with their own significant and complex challenges. As several ISPs noted:

ISP1: totally understand that [SHPs deal with crisis]. But then if that is going to be a barrier, then how do we get around that cause if’s everyone’s got a day job, haven’t they? Everyone’s got different priorities.

ISP2: I think there’s probably a re-sourcing issue there [with the SH] and that’s not to say that they haven’t done a great job. I just think that you know that’s sort of on the ground day-to-day help that’s needed might not be able to be provided by [a] housing provider.

ISP3: slight frustration is that, you know, we want to do the right thing, but then it gets stuck somewhere for a few months. It then reappears, and then it gets stuck again and it’s kind of this cycle.

ISP4: I think two challenges really to kind of draw out really and you referenced it earlier, it’s about the speed at which people kind of work. [...] I have found it little bit like walking through treacle, trying to get anything off the ground. We talk a lot and then there’s not much action, if I’m being absolutely honest.

As noted in Section 5.1.3, both SHPs and ISPs highlighted how these difficulties can become more complex as different parts of each organisation seek to link up and address the various material, organisational, and legal barriers. Overall, the ISPs were very impressed with the way GMCA had brought together all parties for this pilot intervention:

ISP2: They [GMCA] were very good at pulling things together and, you know, and making things happen. I was impressed at how they set up the pilot and matched us with our housing provider and kicked all of that off and the intention that they have is really wonderful.

Pricing and value

A goal of the GMCA pilot was to see if commercially viable solutions to provision of broadband to social housing tenants could be achieved through the collaboration of SHPs, ISPs, and local/regional government. As we will note in a moment, there remain key issues of affordability for tenants. Separate from this, all the ISPs raised concerns about the potential to offer commercial/market solutions or social tariffs for this sector in the long term. Across the interviews the research team identified a background concern that was directly articulated by one ISP:

ISP2: I think it’s quite difficult, isn’t it, relying upon the private sector to bridge the whole gap. The “gap” needing to be bridged was between, on the one hand, the ability of social housing tenants to pay for service and their ability to be regular and reliable customers for the ISPs, and, on the other hand, the prices ISPs could commercially charge, the costs of serving this customer base in terms of both its variability/unsustainability and the costs of installation into the housing stock. This issue of the cost of installation emerged a number of times. Outside of the GMCA pilot, such provision is costly and may not meet “cost-benefit” requirements for the necessary investment if the likely customer base and service take up will be low, with clients being only likely to take up lower price products. As one ISP noted:

ISP4: What doesn’t seem to resonate with housing associations and some local authorities is that it is a commercial provision here. You have to make a return of investment on the commercial provision. They can create [this] through the processes [and] ability for me not to provide services, and I’m not saying I have that with this specific housing group. I will say if I wasn’t in a pilot, it wouldn’t be the first choice that I would be building into.

Nearly all the ISPs provided some form of “social broadband” as part of their corporate social responsibility provision and activity under which this pilot work operated. More broadly, they offered social tariffs which were improved (i.e., lower price) during the pilot. That said, they noted the limits of this provision:

ISP2: Our social broadband is sold at a loss. So, there’s a limit to how much we can sell of that and how long we’ll be able to do that for. But it is nonetheless out there at the moment.

ISP1: We operate on such tight margins because we are a value provider. That means that our options are limited. These commercial limits meant that getting overall corporate support for changing social tariffs and offers was challenging. Raising again the issue of having to work across multiple aspects of the organisation:

ISP1: The other challenge that we came across, and this was an internal challenge, was, you know, we can’t just create new tariffs. It’s very, very complicated to do that. And so that’s what led us to try and kind of change to find a solution that we could try and find to help without having to create a new tariff. It’s almost looking at what is available and using it available and as opposed to trying to create a new thing.

Identifying those able to take a social tariff

At the start of the pilot only one ISP had access to the Department for Work and Pensions (DWP) API such that they could assess tenant’s rights to be awarded a social tariff. This created complexity for other ISPs who had to undertake other methods to assess eligibility. These were often complex and ISPs had to seek information from tenants who would likely deter engagement. Fortunately, during the pilot, the DWP API became available to a wider set of ISPs.

Key takeaways

The research team see the following key takeaway points from the ISP interviews:

- There are commercial limits to social tariffs.
- Social tariffs are useful but they are a “one size fits all” solution for people in complex circumstances.
- The delivery by ISPs of programmes to support social housing tenants through social tariffs, provision of broadband to housing stock, data SIMs, local support interventions such as “digital champions”, and engagement with SHPs requires complex co-ordination across the whole ISP organisation sector.
- Interaction between ISPs and SHPs is further complicated by the need to link two complex organisations with multiple “silos”. There are also significant differences in available time and resources as well as specific work priorities and pressures that make aligning timetables and workload difficult across these very differently focused types of organisations.
**UPTAKE**

Table 2 details the initial goals of the pilot in terms of tenant reach. Unfortunately, in all cases, uptake of the various ISP offers was low, only rising above several hundreds in one case. ISPs noted in interview evidence that even those taking up the service were not making full use of the available data nor or broadband throughout. A couple of ISPs reflected on why final uptake was low. As explained by one of them:

ISP: The take-up of the SIMs has been remarkably low. Perhaps it’s partly because an [ISP] member of staff left. Partly it might be because there’s also a little bit of scepticism, I think from residents, about taking up a social tariff offer. Maybe they don’t want to swap out their SIM in their phone, maybe they think that this will cost them money in some way.

It is clear to the research team that the SHPs and ISPs put in considerable effort to make the intervention offers visible to the relevant tenants. Examples of outreach communication are presented in Appendix A.

Looking at the evidence, the research team believe that there are three main reasons for limited uptake:

- Social tariffs do not meet many tenants’ needs.
- The project’s main focus was on access.
- It was hard to matching offers to tenant base.

### Accessing social tariffs

At the core of the GMCA pilots was a desire to explore how ISP engagement with SHPs and a review of social tariffs might lead to a market sustainable intervention to increase digital access and digital inclusion. As noted above and further unpacked below, actual uptake of the ISP offers was low. It is fair to suggest that price remains a major barrier, which is coupled with limited awareness of social tariffs as an option to support broadband or mobile data access.

A significant 51% of GMCA respondents stated that they were not interested in a social tariff, and a majority of 88.2% of those who are online and could take a social tariff also declared that they were not interested. Those interested in a social tariff, however, are more likely to be under 38 years old and more likely have children. Respondents were not willing to pay up to £15 for a social tariff. There was no statistical significant difference between how many people are currently paying for broadband and their interest in a social tariff. Nor was there a statistically significant difference between users of smartphone only and other residents in their interest in a social tariff.

This fits with national UK situation with regard to social tariffs. Nationally, citizens are not aware of social tariffs and 39% of people who could claim a social tariff did not think it was aimed at them. Yet, of those who are eligible for a social tariff, 20% have had challenges paying for digital technologies or devices. However, having had these challenges does not affect attitudes to social tariffs (analysis of Ofcom Affordability data). Nevertheless, nationally all income groups are struggling with the cost of digital technologies, with the least socio-economically advantaged being least confident that they can maintain payments.

### Costs of social tariffs

In our survey of GMCA residents, we found that very few people who qualified for a social tariff were prepared to pay more than £15 for this. The majority of respondents were prepared to pay between £11 and £15 per month for a social tariff. However, a significant number (40%) would not be prepared to pay more than £10 per month (see Figure 6). In our focus group interviews, we noted residents had concerns about the quality and speed of social tariffs, questioning the cost-benefit of a social tariff. There were also concerns about the complexity of the process of moving onto a social tariff and length of contact “tie-in”. These results align with other work on social tariffs. The London School of Economics has used Ofcom affordability data to calculate a comparable (proportional) cost for social tariffs for those on benefits as compared to those on average incomes. They concluded that social tariffs need to be £4-£7 per month for broadband to be as affordable for households that are more socio-economically disadvantaged.

A similar conclusion is drawn in work by Promising Trouble. This work found that current broadband costs for those on the lowest incomes are more than four times higher (47%), as a proportion of disposable income after housing, than for those in the highest income brackets (1%). For those on benefits who could claim a social tariff, the average cost of broadband services is between 3.85% and 8.4% of after-housing disposable income. Even social tariff rate cost to households on benefits remains between two and four times higher relative to earners. For households on benefits, social tariffs would need to fall from an average of £16.50 to £8 to be equally affordable (see Table 3).

These findings align with national research results. In multiple surveys, the costs of broadband and equipment are some of the primary reasons given for not taking up internet access in the next 12 months “No need to go online, not interested” as the main reason to not take up internet provision (see Table 5). In focus groups, respondents queried the complexities of taking up a social tariff such as changing provider, changing phone number, or having to have new equipment and apps. Anecdotally, this appeared to be a potential barrier, especially for older residents. Again, this aligns with the national findings where 20% of the reasons given for not taking up the internet related to complexity or the option for others to use the internet for you (proxy use). We would argue that this concern also likely holds for switching either broadband or mobile provider.

Focus group members also queried the value of social tariffs. If the provision is at a very low level (< 30MBs), social tariffs may not be seen as having sufficient value to commit anything from 2% to 5% of non-housing expenditure (see Table 3 above). We would note that the deliberative consensus definition of a minimum broadband speed derived from the MDLS study is (see Section 1.4).

Sufficient reliability and speed to support all family members to access the internet at the same time. Even though this is not a fixed number, we would argue that residents may consider internet speeds that are unable to

Table 3: Proportion of income needed after housing costs for standard and social tariff broadband

<table>
<thead>
<tr>
<th>Household Type</th>
<th>Standard tariff</th>
<th>Social tariff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median</td>
<td>1.28%</td>
<td>n/a</td>
</tr>
<tr>
<td>Out-of-work UC claimant</td>
<td>8.4%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Part-time UC claimant</td>
<td>3.0%</td>
<td>1.98%</td>
</tr>
<tr>
<td>Individual in receipt of disability benefits</td>
<td>6.68%</td>
<td>3.67%</td>
</tr>
<tr>
<td>State pension and pension credits</td>
<td>3.85%</td>
<td>2.17%</td>
</tr>
<tr>
<td>Low-income household not eligible for benefits (most will not be eligible for a social tariff)</td>
<td>4.74%</td>
<td>2.60%</td>
</tr>
</tbody>
</table>

3. https://www.promisingtrouble.net/blog/internet-access-a-universal-right
Table 4: Social tariffs available in GMCA (2023) from Ofcom data

<table>
<thead>
<tr>
<th>Package</th>
<th>Price</th>
<th>Average speed</th>
<th>Where it is available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fourth Utility Social Tariff</td>
<td>£13.99 a month</td>
<td>30 Mbit/s</td>
<td>England</td>
</tr>
<tr>
<td>BT Home Essentials</td>
<td>£15 a month</td>
<td>Around 36 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>BT Home Essentials 2</td>
<td>£20 a month</td>
<td>Around 67 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>EE Basics</td>
<td>£12 a month</td>
<td>Up to 25 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>O2 Lyca Gigabit Connect</td>
<td>£19 a month</td>
<td>100 Mbit/s</td>
<td>England</td>
</tr>
<tr>
<td>Hyperoptic Fair Fibre 50</td>
<td>£15 a month</td>
<td>50 Mbit/s</td>
<td>England, Scotland, Wales</td>
</tr>
<tr>
<td>Hyperoptic Fair Fibre 150</td>
<td>£20 a month</td>
<td>150 Mbit/s</td>
<td>England, Scotland, Wales</td>
</tr>
<tr>
<td>NOW Broadband Basics</td>
<td>£20 a month</td>
<td>36 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Shell Essentials Fast Broadband</td>
<td>£15 a month</td>
<td>11 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Shell Essentials Fibre Broadband</td>
<td>£20 a month</td>
<td>38 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Sky Broadband Basics</td>
<td>£20 a month</td>
<td>36 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Virgin Media Essential Broadband</td>
<td>£12.50 a month</td>
<td>15 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Virgin Media Essential Broadband Plus</td>
<td>£20 a month</td>
<td>54 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Vodafone Fibre 1 Essentials</td>
<td>£12 per month</td>
<td>38 Mbit/s</td>
<td>UK</td>
</tr>
<tr>
<td>Vodafone Fibre 2 Essentials</td>
<td>£20 per month</td>
<td>73 Mbit/s</td>
<td>UK</td>
</tr>
</tbody>
</table>

Table 5: Reasons not to take up the internet (Ofcom Tech Tracker 2023)

<table>
<thead>
<tr>
<th>Reasons why you are unlikely to get internet access at home in the next 12 months? (Multiple options could be selected)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>“No need to go online, not interested”</td>
<td>69.7</td>
</tr>
<tr>
<td>“Broadband set up costs are too high”</td>
<td>18.4</td>
</tr>
<tr>
<td>“Using the internet is too complicated”</td>
<td>17.6</td>
</tr>
<tr>
<td>“Someone else can go online for me if necessary”</td>
<td>13.5</td>
</tr>
<tr>
<td>“Monthly cost of a fixed broadband service is too high”</td>
<td>12.3</td>
</tr>
<tr>
<td>“Cost of a desktop, tablet or laptop computer to use the internet is too high”</td>
<td>10.7</td>
</tr>
<tr>
<td>“Cost of a mobile phone handset to use the internet is too high”</td>
<td>9.0</td>
</tr>
<tr>
<td>“Getting online got connected to the internet is too complicated”</td>
<td>7.8</td>
</tr>
<tr>
<td>“Other”</td>
<td>7.0</td>
</tr>
<tr>
<td>“Monthly cost of a mobile phone service is too high”</td>
<td>6.1</td>
</tr>
<tr>
<td>“Poor eyesight”</td>
<td>6.1</td>
</tr>
<tr>
<td>“Concerned about security, fraud, privacy”</td>
<td>4.9</td>
</tr>
<tr>
<td>“Happy to use the internet at work elsewhere”</td>
<td>4.5</td>
</tr>
<tr>
<td>“Concerned about harmful, offensive content”</td>
<td>1.6</td>
</tr>
<tr>
<td>“Broadband is too slow where I live”</td>
<td>1.2</td>
</tr>
<tr>
<td>“Don’t have broadband where I live”</td>
<td>0.8</td>
</tr>
<tr>
<td>“Don’t know”</td>
<td>0.8</td>
</tr>
</tbody>
</table>

deliver this as not being value for money. ISPs were aware that offering just the bare minimum on a social tariff might be an issue.

ISPs: The conversations that went on internally were around the fact that, okay, this is a social tariff, but it doesn’t necessarily mean that what you’re trying to achieve is the bare minimum of everything across the board.

In focus groups, many respondents gave examples of internet service “dropping out” if multiple household members were using it at the same time. Our survey work indicates that those GMCA social housing tenants unable to use the internet at home report poor internet speeds and connectivity as the key issue (43%).

Project focus on access

Even though two of the interventions included providing some access to training, the overall focus of the project has been on the provision of broadband access. This is key and the base of all digital inclusion but, even though it is necessary, it is not sufficient to support sustained digital inclusion. This finding has been a key part of the research literature briefly presented in Section 1.4. Much of the work of this project has been about getting access to residents, whether that was as complex as broadband installation into older properties or as simple as handing out a SIM card. As such, the GMCA digital pilot reported here consisted of five projects that were a “one size fits all” baseline approach in each area.

Access is, of course, most relevant to those who are offline. This group of complete non-internet users has reduced from over 20% of UK population in period 2010–2013 to 8% now (see Section 3.1). As noted above in Section 3.1.6, this group now primarily consists of some of the most marginalised, older, and vulnerable groups. Even though supporting this group to access and use the internet is important, there are far larger numbers of people who are limited internet users. The major contemporary challenge is moving these citizens with intermittent access (broadband or mobile), low levels of use and limited skills into a situation where they can better engage with digital services, media, employment, and the broader “digital” society.

Reflecting on this, one of the ISPs noted greater success in targeting interventions:

ISP5: What we’ve learned here is that a more targeted approach is more effective. So, we’ve done the targeted voucher scheme through the [UK Government Department]. So that has been a scheme by the future Prosperity Fund, I think. And so it’s funded by government. But it’s targeted at job seekers to get them online rather than prescribing that people need to take a certain tariff. If that more targeted approach or that best practice was to be kind of extended across other government departments, that might be a better approach than a kind of one size fits all, social housing thing or social tariff or whatever.

This point relates to motivation. Providing broadband to a previously unconnected lower block or providing a young person with data SIM may bring the internet “to their door”, but it does not address any specific needs they might have. These might include a device capable of making video calls to stay in contact with relatives or skills to use devices well to gain employment. In the context of Dixon’s Internet Elements (see Section 1.4, Figure 2) there may be a need to focus delivery on whichever of the “elements” tenants most need support with or are most interested to engage with. In many cases, those tenants engaging with social tariffs or free SIM offers were not those completely offline but those with existing but poor access.

Matching offers to tenant base

Following on from questions about taking a more targeted approach, we would also highlight an issue raised by both SHPs and ISPs. The initial matching of SHPs and ISPs, though not arbitrary, was driven more by aspects of location (where ISPs were working) and other organisational factors, not the appropriateness of the ISP offer to the SHP client base. For example, the initial contact at Southway Homes worked with older residents. However, the offer of a data SIM was likely more of relevance to their younger client base. It was noted that providing a combination of solutions to tenants that would have allowed them to select something more appropriate to their needs (e.g., SIM vs broadband) might have increased uptake.

Key takeaways

- Social tariffs do not meet the financial nor contextual needs of many tenants at current price point.
- ISPs may not, in fact will not likely be able to, bridge the gap between social tariffs currently at the £12–£20 level with social housing tenants’ ability to afford service, which may be closer to £4–£8.
- Social tariffs are only available to groups on key benefits many other low-income social housing tenants cannot take these up.
- Reasons for low uptake are multi-faceted but cost, complexity, contract worries, and “value for money” may be key factors.
- Targeted interventions addressing specific tenant needs (e.g., employability, access to health, access to friends and family) may be more effective than broad access interventions.
- Ensuring access remains key.

22 23
CONCLUSIONS

This will reduce within their and Regional Government need to lower cost services while maintaining commercial organisations, there developing tariffs. However, it needs in the development and delivery of this The ISPs have been an active partner practices/agreements prior to activity discussions between partners, would be useful to consider having systems and legislative frameworks between public and private sector reported good relationships were extensively insight and helping. Digital inclusion is a key issue for architects, there diversity of SHP tenants Digital inclusion training needs of SHP tenants are diverse and the question of how best to meet these needs requires some careful consideration as the training needed should be about not just employability but also how to be a "digital citizen" in a "digital society". Bridging the value gap, bringing in other sector partners There is a question as to where the "value" of supporting social housing tenants to be online sits. This pilot has mainly focused on the direct value to tenants, the secondary value to ISPs of having new clients, and the more distributed value to SHPs and local government of tenants using digital services. There are others who also gain value from tenants being online. Healthcare services benefit as tenants may utilise online as opposed to In-person systems and support. Key government departments (NHS, DWF, etc.) gain from having a digitally enabled client base. The research team would therefore question why the onus has been on the ISPs to bring social tariffs closer to tenants' affordability threshold or to undertake the expense of fitting supply to complex housing. There may be an argument for cross public and private sector work – bringing together all parties who may benefit – to bridge this "value divide".

OTHER KEY LEARNING AND REFLECTIONS

Reflecting on the overall findings and results, the research team would highlight the following issues.

The importance of digital inclusion to SHPs

Digital inclusion is a key issue for SHPs. The benefits of addressing this issue among tenants is well noted by SHPs involved in this pilot. However, while there is the will to act, SHPs are limited by a lack of dedicated officers whose role would be to coordinate organisational response to digital inclusion, including asset management, data security and sharing, tenant engagement.

The ambition of the pilot

Even though target uptake numbers were not reached, this was an exploratory learning pilot achieving both extensive insight and helping to drive forwards policy in GMCA and nationally. The pilot operated an ambitious multi-layered public and private sector structure which did produce benefits for tenants. Partners reported good relationships were in place across the pilot but issues regarding a lack of connectivity between public and private sector systems and legislative frameworks were reported. Going forward, it would be useful to consider having discussions between partners, local and national government to establish standard working practices/agreements prior to activity commencing.

Centrality and limits of what ISPs can do

The ISPs have been an active partner in the development and delivery of this pilot, working flexibly to accommodate issues with housing stock and developing tariffs. However, it needs to be understood that, as these are commercial organisations, there is a limit to which they can provide lower cost services while maintaining their own financial viability. Central and Regional Government need to consider the gap between what these organisations provide and what actions and funding are required to promote digital inclusion.

In discussion with GMCA colleagues, we have identified the following key summary comments and recommendations.

Key learning

1. Social tariffs on their own do not work. At over £30 they are not affordable for people on benefits, drawing upon findings from the University of Liverpool and others, which used the national average baseline. If 1.3% of disposable income, the level other households spend on digital access, was applied for those on Universal Credit, a more affordable tariff would be £4-£5 or £7 for part time workers. This is well below the minimum tariff that is commercially viable for internet service providers.

Recommendation:

Social housing providers should consider identifying digital inclusion leads and explore pooling expertise and resources with other SHPs to create more capacity in this important area, which will increase impact upon the life chances of their tenants and their ability to engage with all support services.

2. The commercial value/margins for ISPs from social housing tenants is not as high as other tenures. This means that SHPs need to make it as attractive as possible if gaps in connectivity coverage, which are still a problem in some social housing areas, are to be addressed.

Recommendation:

Reduce costs of market investment, as far as possible, through a. Securing agreement of standardised wayleaves and specification across social housing in GM. This will both speed up commercial rollout (as the legal costs of wayleaves are high) and the lack of modern infrastructure in multi-home housing blocks and tower blocks. A draft agreement has now been produced by three ISPs and four SHPs as a starting point for wider agreement.

3. Capacity in social housing providers is not high enough to manage the process of engagement and development of partnership working with ISPs. There are currently few dedicated digital inclusion roles within social housing providers.

Recommendation:

Social housing providers should consider identifying digital inclusion leads and explore pooling expertise and resources with other SHPs to create more capacity in this important area, which will increase impact upon the life chances of their tenants and their ability to engage with all support services.

Key pilot outcomes

The GM Digital Inclusion Social Housing Pilots has achieved a series of important outcomes:

1. A rethink by several ISPs involved in the pilot about the market opportunity in providing access to social tariffs. This has resulted in a number of new social tariff offers being made which have since been rolled out across the UK.

2. More effective targeting on those in need of support was made possible through industry-wide access to DWF's API which enabled providers to target social tariff offers to tenant on benefits.

3. Identification of the key administrative barriers to market investment in connectivity in social housing – leading to the development of a standardised bulk wayleave and specification agreement. This will reduce administrative burden for SHPs and rollout costs for the market leading to more investment in connectivity and social value benefits. Adoption of this approach by all GM SHPs will now be encouraged.

4. Identification of the clearer role and opportunity for social housing providers to be more proactive in creating mutually beneficial partnerships with ISPs which can accelerate full fibre rollout and deliver high levels of social value.

5. Provision of an important evidence base for partners on the project to embed minimum digital standards within GM's emerging Landlords Charter.

6. Identification of market failure for key groups of people within social housing (over 75s and disabled groups) that can only be addressed by external intervention.

7. Recognition of the importance of social housing providers to have access to data to enable them to better understand who the vulnerable tenants are within their portfolio. This will be particularly important for the switch of the public service telephone network which will be complete by 2025.

8. Development of the following forward options for the social housing providers to consider as part of the wider rollout across the City Region:

• Supportive approach – supporting the market to address gaps in full fibre coverage and providing strong competition where tenant have a choice of infrastructure provider (not just a choice of ISP). There is the opportunity to take advantage of corporate social responsibility offers and minimise disruption and impact of capacity by using wayleave/specification agreement. This would involve the encouragement of take up of digital services for any individual ISP by the SHP.

• Proactive approach – where SHPs enter into a non-exclusive partnership with an ISP with joint branding of a range of offers.
aimed at accelerating take up. The pilots demonstrated the value of the promotion of social tariffs, connection of community hubs to promote offers to tenants, essential skills support, access to devices; and possibly targeted tariffs aimed at the most vulnerable.

- Transformational/Disruptive approach – where the SHP procures time-bound partnership with ISP to provide network access across portfolio to support facility management needs (e.g., damp, energy, breakdown monitoring) in ways that are potentially linked with health and social care offers. There is the potential here to derive added social value from the procure, which could include targeted provision of free network access for vulnerable tenants (as have been delivered in Rochdale).

Next steps

These pilots have created the foundations for a far more constructive and mutually beneficial relationship for social housing providers and internet service providers. The three options for SHPs above form the basis for further discussion with ISPs, which needs to reflect the reality that every place is different. For example, those SHPs with high levels of tenant poverty may take the view that a transformational approach is needed because of high vulnerability combined with low current levels of connectivity take up. In contrast, SHPs with lower levels of benefit claimants may be able to partner with an ISP to address digital exclusion through a proactive approach because there is a greater commercial opportunity for the ISP.

The Public Switched Telephone Network switchover is a significant challenge but opportunity for social housing providers that will impact upon vulnerable tenants and many of the support services they receive. Digital exclusion makes the problem worse and therefore social housing providers will need to determine the level of risk it presents to tenants.

The pilots have proved that the market can only go so far in addressing digital exclusion in social housing. ISPs are limited by lower financial margins in social housing areas and, whilst the reduction in costs of delivery is helpful (e.g., through standardised wayleaves and specification), it does not fund significant investment in social value. This can only be achieved through a transformational approach that would involve a procurement. The original objective to target particular groups of people in social housing (young people, over 75s, disabled people) could not be realised because of the lack of commercial return. Public intervention is therefore needed in these areas because of proven market failure. The provision of a social tariff is not enough.

The current UK Universal Service Obligation is a misnomer because it is aimed at addressing access to connectivity (currently 10 Mbps) rather than delivering a basic minimum service, which is needed by people who are digitally excluded. This is an issue that the Government working with Ofcom should seek to address – working with the market to ensure any solution does not impact on market competition.

APPENDIX A: TENANT COMMUNICATION

Wythenshawe

Do you need help getting online at home?

WCHG can help you apply for a broadband social tariff, equipment and IT training.

CALL US: 0800 633 5500 or 0300 111 0000

POP INTO WYTHENSHAWE HOUSE: 8 Poundswick Lane, Wythenshawe, M22 8TA

This project is part of a city-wide pilot in partnership with Andy Burnham, Mayor of Greater Manchester, and GMCA.

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APPENDIX B: TENANT TRAINING

WHAT HAPPENS AT THE END OF THE SIX MONTHS?
You will have the option during the last few weeks how you would like to use your device as you go self - governed. This is to ensure you are content with your service. A member of staff will be in touch to confirm your choice.

HOW DO I CLAIM MY FREE SIM CARD?
If you are a Southway tenant and wish to claim, please contact us and leave a message for our Digital Inclusion Officers, Joe and Sarah, 0141 446 4230, email info@southwayhousing.co.uk or visit our office between 10am and 2pm, Monday to Thursday.

WHAT IF I DON’T HAVE AN INTERNET DEVICE OR KNOW HOW TO USE IT?
In addition to the free SIM card, Southway also offers a range of other support to help people of all ages and backgrounds to get online. This includes:

- **Equipment Loan**
  - Southway can loan access to tablets and laptops to tenants for five or six months. Internet access is provided via the free SIM card above. A tenancy supply of £30 is required to cover the cost of any turbulence in the internet or broadband (contact us to apply).

- **Help keeping a computer**
  - If you are interested in a simple computer course, Southway tenants get discounts of £5 each.

- **Computers Courses**
  - Our Internet Cafe course is free and can help you with connecting from basic computer skills and using email to everyday online order for jobs. We use the Southway online portal to manage your tenant account. This is paid for in small instalments and can be paid off on the cheapest value. For more information contact the Digital Inclusion Officers (Joe and Sarah) on 0141 446 4230. The dates at the bottom of this leaflet to find our about Southway.

- **Good Connections - IT Support**
  - Support for people over 65.

  - A range of software and IT training is available for people who have had no IT training before. A leaflet is available for more information.

- **Helpful Advice**
  - We have published a guide on getting online for elderly people. The guide includes everything from getting online for the first time to using social media, using Facebook and email, and video calls over Zoom.

- **Other**
  - In addition, Southway offers group sessions, which teach how to keep the device safe. Please book a place to attend.

- **Volunteering**
  - A range of volunteering opportunities is available to help keep you active and healthy.

- **Volunteer roles**
  - Southway also offers a range of volunteer roles to help support people in their community. These roles include IT support, digital inclusion, and community development.

- **Contact us**
  - For more information, please contact us at info@southwayhousing.co.uk or visit our office between 10am and 2pm, Monday to Thursday.

- **Southway Housing**
  - Southway Housing is a registered housing association providing affordable homes for people in South Lanarkshire.

- **Digital Inclusion**
  - Southway Housing is committed to providing digital inclusion support to its residents. The organisation offers a range of services to help people get online, including IT courses, equipment loans, and access to support and advice.

- **South Lanarkshire Council**
  - South Lanarkshire Council is the local authority for the South Lanarkshire area. The council provides a range of services to its residents, including housing, community development, and digital inclusion support.

- **Volunteers**
  - Southway Housing relies on volunteers to support its work. The organisation provides training and support to its volunteers to help them get involved in their community.