Lessons from Wales's Superfast Cymru on Expanding High-Speed Broadband

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The COVID-19 pandemic has sharply underscored the importance of high-speed internet, as millions rely on it to work remotely, attend school, access telehealth, stay connected with family and friends, and participate in civic life. But affordable high-speed broadband and the benefits it enables are out of reach for millions of Americans, including many living in Tribal and rural areas and with low incomes in urban areas. To ensure an inclusive recovery from the pandemic, US policymakers can prioritize expanding high-speed broadband access to all residents. Many countries have made progress in expanding broadband access in recent years, with one program in particular—Superfast Cymru in Wales—offering innovative elements potentially adaptable to a US context.

Policy Innovation

Between 2013 and 2018, the Welsh government contracted a private provider to build a high-speed network that multiple internet service providers could access to expand high-speed internet to new areas. Through Superfast Cymru, nearly 800,000 businesses and homes gained high-speed broadband access. Wales also paired the new broadband infrastructure with programs to stimulate demand, provisions to verify the service's speed, and obligations that the provider would reinvest any revenue beyond the program's targets to further expand access.

Key Takeaways for US Policymakers

1. Enable competition and consumer choice by building an **open broadband infrastructure** that multiple service providers can use.
2. Pair investments in broadband infrastructure with **efforts to stimulate consumer demand** to ensure the economic benefits of broadband access are fully realized.
3. Ensure government goals, such as high speeds and widespread geographic coverage, are met through rigorous **speed testing and verification**.
4. Enable governments to **reinvest excess subsidies into further expansion** by including contract provisions that capture some of the profits from expanded networks.

Bottom Line

The Superfast Cymru design, including its open-access structure, demand-stimulation measures, and reinvestment mechanisms, offers a compelling model for expanding broadband access. But fully closing broadband access gaps in the US will require multiple approaches tailored to local needs, such as municipal broadband, rural cooperatives, and gap networks. Efforts to expand broadband access should be paired with programs to improve affordability and address inequities in broadband adoption.

This fact sheet draws from the Urban Institute brief "Lessons from Superfast Cymru for Broadband Access in the United States," available at https://www.urban.org/research/publication/lessons-superfast-cymru-broadband-access-united-states.