

Dyddiad: Dydd Mercher 24 Hydref 2001
Amser: 2.00pm hyd 5.05pm
Lleoliad: Ystafell Bwyllgora, Adeilad y Cynulliad Cenedlaethol

ADOLYGIAD O DECHNOLEG GWYBODAETH A CHYFATHREBU YNG NGHEFN GWLAD

Diben

1. Gwahoddir y Pwyllgor i ystyried y dystiolaeth ysgrifenedig a ddaeth i law a'r rhaglen a gynigiwyd ar gyfer yr adolygiad.

Cefndir

2. Yn ei gyfarfod ar 18 Gorffennaf cytunodd y pwyllgor ar gylch gorchwyl ar gyfer ei adolygiad o dechnoleg gwybodaeth a chyfathrebu yng nghefn gwlad. Yn dilyn hynny, gwahoddwyd safbwyntiau ysgrifenedig gan ystod o sefydliadau â diddordeb. Mae copi o'r llythyr gwahoddiad a'r cylch gorchwyl yn atodedig yn atodiad 1. Cyhoeddwyd y gwahoddiad i gyflwyno tystiolaeth ysgrifenedig hefyd ar dudalennau'r pwyllgor ar wefan y Cynulliad.

3. Daeth tri ymateb ar ddeg i law. Mae crynodeb o'r prif bwyntiau a godwyd yn atodiad 2. Mae copïau o'r ymatebion llawn ar gael drwy glicio [yma](#).

Y camau nesaf

4. Amcan cylch gorchwyl yr adolygiad ydyw canfod y mathau o wasanaethau TGCh sydd eu hangen yng Nghymru wledig a pha gamau sydd angen eu cymryd er mwyn sbarduno'r cyflenwad a'r galw. Mae'r rhaglen ddrafft yn atodiad 3 yn awgrymu strwythur ar gyfer casglu rhagor o dystiolaeth lafar er mwyn hwyluso hyn. Mae'r rhaglen a awgrymir yn dechrau gyda gorolwg, o safbwynt Cabinet y Cynulliad, o'r fframwaith strategol sydd yn ei le ar gyfer darparu TGCh yng Nghymru wledig. Yn erbyn y cefndir hwn, awgrymir y dylid casglu rhagor o dystiolaeth gan y rheiny sydd â phrofiad ymarferol o ddefnyddio potensial datblygiad cymunedol ac economaidd TGCh mewn ardaloedd gwledig (Llwybr-Pathway a CyflE Cymru).

5. Ar ôl y Nadolig, mae'r rhaglen ddrafft yn rhagweld y bydd angen cymryd rhagor o dystiolaeth lafar gan y prif gyrff a noddir a Phartneriaeth Canolbarth Cymru. Y bwriad yma fyddai profi i ba raddau y mae'r gweithrediadau yn cydfynd â nodau strategol cyffredinol y Cynulliad a'r materion ymarferol a godwyd mewn cyfarfod cynharach. Efallai y bydd y pwyllgor hefyd yn dymuno gwahodd BT neu ddarparwyr eraill yn ddiweddarach yn ystod yr ymholiad i weld sut y maent yn ymdrin â'r materion a godwyd.

6. Tra bydd y pwyllgor yn casglu tystiolaeth ein bwriad yw dangos potensial TGCh ar gyfer datblygu gwledig drwy ddefnyddio arddangosiadau ymarferol, astudiaethau achos a phrofiad tramor.

Gweithredu

7. Gwahoddir y pwyllgor i nodi'r dystiolaeth ysgrifenedig a gafwyd ac i gytuno ar y rhaglen ddrafft yn atodiad 3.

Ysgrifenyddiaeth y Pwyllgor

Hydref 2001

Atodiad 1

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**Pwyllgor Amaethyddiaeth a Datblygu
Gwledig
Agriculture and Rural Development
Committee**

Bae Caerdydd / Cardiff Bay
Caerdydd / Cardiff
CF99 1NA

27 Gorffennaf 2001

Annwyl Gyfaill

Adolygiad y Pwyllgor Amaethyddiaeth a Datblygu Gwledig o dechnoleg gwybodaeth a chyfathrebu yng nghefn gwlad

Mae'r Pwyllgor Amaethyddiaeth a Datblygu Gwledig yn cynnal ymchwiliad i'r dechnoleg gwybodaeth a chyfathrebu (TGCh) sydd ar gael yng nghefn gwlad Cymru.

Bydd yr adolygiad yn canolbwyntio ar ystyried pa wasanaethau sydd eu hangen fwyaf ar fusnesau a chymunedau yng nghefn gwlad Cymru a'r hyn sydd gofyn ei wneud i annog darparwyr masnachol i ymateb i'r galw hwnnw. Amgaeir copi o gylch gwaith yr adolygiad yn atodiad A.

Os hoffech gyfrannu ato, anfonwch eich sylwadau ysgrifenedig, yn ddwyieithog os yn bosibl, dros yr ebost at: Agri-rural.comm@wales.gsi.gov.uk neu drwy'r post i'r cyfeiriad uchod i'n cyrraedd erbyn 21 Medi 2001.

Ar ôl ystyried y cyflwyniadau ysgrifenedig, bydd y pwyllgor yn clywed tystiolaeth lafar yn yr hydref.

Mae'r llythyr hwn a'r cylch gorchwyl wedi cael eu hanfon at y rhai a enwir ar y rhestr yn atodiad B. Mae croeso i chi ddsbarthu'r gwahoddiad hwn i unrhyw un arall sydd â diddordeb.

Yn gywir

Adrian Crompton

Clerc y Pwyllgor

Atodiad A

Cylch gwaith

1. Cyfeirio at astudiaethau achos a phrofiad unigolion yng Nghymru a mannau eraill, i weld pa gamau ychwanegol y gellid eu cymryd i sicrhau bod econopmi a chymunedau gwledig Cymru yn manteisio'n llawn ar ddatblygiadau'r Oes Wybodaeth.

2. Bydd yr astudiaeth yn rhoi sylw arbennig i natur y gwasanathau TGCh sydd eu hangen yng nghefn gwlad Cymru a'r hyn sydd gofyn ei wneud i symbylu'r galw amdanynt a'u darparu trwy:

- weld pa weithgareddau TGCh, ar y gweill ac yn yr arfaeth, sy'n effeithio ar ddatblygiad economaidd, addysgol a chymunedol cefn gwlad Cymru;
- asesu'r galw am wasanaethau a chynnyrch TGCh yng nghefn gwlad Cymru, a sut orau i symbylu eu darparu a goblygiadau hynny ar adnoddau;

3. Bydd yr adolygiad yn esgor ar adroddiad a fydd yn rhestru:

- y TGCh sydd ei hangen yng nghefn gwlad Cymru a photensial hynny o ran datblygu'r economi;
 - y camau y mae'n rhaid wrthynt i symbylu darparu gwasanaethau TGCh y mae galw amdanynt yng nghefn gwlad Cymru.
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Atodiad B

Barbara Warner	Powys Careers Guidance Service
Paddy Rooney	Llwynbrain Farm
John Taylor	Countryside Council for Wales
Neil Taylor	Federation of Small Businesses
Glyn Jones	Pembroke College
Simon Hewitt	Forestry Commission
Henry Roberts	Gwynedd Council
Malcolm Thomas	National Farmers Union
Richard Thomas	NHS Confederation - Wales
Iwan Huws	Snowdonia National Park
Cllr Dafydd Iwan	Sain Ltd
John Sheppard	Eres Research and Consultancy
Richard Packman	Business Connect Pembrokeshire
Lynne Thomas	Wales Leader Group
Joan Asby	Wales Rural Forum
Jonathan Jones	Wales Tourist Board
Dr Tim Stowe	RSPB
Graham Hawker	Welsh Development Agency
Cllr W J Williams	Isle of Anglesey County Council
Cllr Denley Owen	Carmarthenshire County Council
Cllr D Lloyd Evans	Ceredigion County Council
David Jenkins	Coed Cymru
Lowri Jones	Wales Young Farmers Clubs
Ruth Parry	Country Landowners and Business Association
Victoria Winckler	Welsh Local Government Association
Mal Thomas	Mid Wales Partnership
Meurig Royles	North Wales Economic Forum
Richard Crawshaw	South West Wales Economic Forum
Elwyn Vaughan	CYMAD
Angela Pulman	Community Enterprise Wales
Amanda Wilkinson	CBI Wales
David Jenkins	Wales TUC
J Phillips	Farmer's Union of Wales
Patrick Sullivan	WDA
Ann Beynon	Post Point 5B

Ian Jeffers	NTL
Emma Wilson	Vodafone Group Services Ltd
Richard Rumbalow	Orange
Ian Roy	BT Cellnet
Brian Fletcher	Hutchinson 3G UK Ltd
Zaki Cooper	One 2 One
John Walter Jones	Welsh Language Board
Stella Mair Thomas	Wales & West ITC
Prof Mike Tedd	University of Wales
Russell Lawson	Federation of Small Business
Lindsey Jones	Llwybr Pathway
Des Oliver	MLL Telecom
David Rosser	CBI
Chris Lloyd	Better Business Wales Ltd
Phil Brady	Bangor University
Prof Tony Davies	Cardiff University
Prof Michael Quayle	University of Glamorgan
Pauline Kotschy	Business Connect Wales Ltd
Simon Gibson	Ubiquity Software Corporation
Alan Horne	ICC
Euryn Ogwen Williams	Wales Digital College
Dylan Jones Evans	Yr Hen Goleg
Alexia Tzortzaki	Montanna Media
Neil Buckley	OFTEL
Richard Bobbett	Crown Castle UK Ltd
Philip Ellis	MITEL Networks
Paul Weber	Pembrokeshire Chamber of Commerce
Donald Clarkson	OnStar Europe Ltd
Richard Woods	World Com UUNET
Ian Hargreaves	Centre for Journalism Studies Cardiff University
Colin McKee	Zipcom Plc
Don Jayasuria	DJ Consulting Services Ltd
Derek Godfrey	Energis Communications Ltd
Huw Price Stephens	Yes Television
Alec Alden	Federation of the Electronics Industry

Peter Slater	Blanau Gwent County Borough Council
Jeff Peters	Bridgend County Borough Council
Ian McVicar	Caerphilly County Borough Council
Geraint John	City & County of Cardiff
Tom Williams	Carmarthenshire County Council
Allan Lewis	Ceridigion County Council
John Penney	Conwy County Borough Council
Gareth Evans	Denbighshire County Council
Graham McWilliams	Flintshire County Council
Economic Development Officer	Gwynedd County Council
Economic Development Officer	Isle of Anglesey County Council
Ray Pierce	Merthyr Tydfil County Borough Council
Rick Longford	Monmouthshire County Borough Council
David Gilbert	Neath Port Talbot County Borough Council
Roger Davies	Newport County Borough Council
Mr K Wakefield	Pembrokeshire County Council
Economic Development Officer	Rhondda Cynon Taff County Borough Council
Economic Development Officer	City & Council of Swansea
Economic Development Officer	Torfaen County Borough Council
John Maitland-Evans	Vale of Glamorgan Council
Paul Roberts	Wreham County Borough Council
John Jones	BT Ignite
Graham Davey	Powys County Council
Jim Grafton	Outhouse plc
Annette Jones	ELWa
David Walker	The Environment Agency
Cllr Maurice Hughes	Pembrokeshire County Council
Ms G Davies	Wales Council for Voluntary Action
Mrs J Randell-Smith	Institute of Rural Health
Julian Salmon	Hoddell Farm
Hywel Evans	Science Park

Ann Watkin
 Jacky Tonge
 Andrew Green
 Deiniol Tegid
 Dafydd Hughes

WDA
 Powys County Council
 National Library of Wales
 British Telecom
 TAC
 Robertsons Research International Ltd

Atodiad 2

ICT Review - Consultation Responses

Name	Current and Planned ICT activities
David Jenkins (Coed Cymru)	Advocates simplification - timber and timber products sector should concentrate on traditional marketing. ICT does nothing to generate ideas or promote green image
Ceredigion County Council	<p>MARAN - launched last year. Provides microwave communications system between Powys, Ceredigion and Carmarthenshire CCs. Number of organisations interested in joining MARAN - Dyfed-Powys Police; Pembrokeshire CC; Dyfed-Powys Probation</p> <p>MARAN infrastructure has very large unused capacity. Large potential demand but obstacles to joining - legal and tendering which need to be overcome. Need to make capacity available to businesses, schools, communities and residents of area.</p> <p>Need to:</p> <ul style="list-style-type: none"> ● Provide nodes in smaller settlements - eg primary schools ● Provide revenue funding for ICT for Learning; New Opportunities Fund; Canllaw for Access Points, etc
Powys CC - Telecentres Powys	Voluntary/community run facilities involving wide range of partners - need public funding

<p>Prof Mike Tedd, Aberystwyth University</p>	<p>Current position in Wales:</p> <ul style="list-style-type: none"> ● all BT exchanges digital, served by high capacity fibre optic trunks ● all exchanges can now offer ISDN lines ● BT offers advanced services at ‘local rates’ everywhere in Wales ● ADSL is being rolled out in ten rural towns as well as in much of South Wales ● first stirrings of competition in rural Wales; MLL Telecom is using microwave transmission to serve high-demand customers in some areas ● all four mobile telephone operators are active throughout Wales ● BT is constrained by OFTEL to charge a standard rate for its services anywhere in the UK - means the effects of competition felt in all areas <p>Problems:</p> <ul style="list-style-type: none"> ● BT has an effective monopoly of infrastructure in most of Wales. ● quality of telephone lines in some parts of Wales is not very good. ● no visible progress with the North Wales ‘cable’ franchise. ● mobile telephony is patchy in rural Wales (but improving). The next generation ‘3G’ will be slow to roll out in Wales. ● no bidders for the Welsh licences in the recent Broadband Fixed Radio Access auction. ● some services, notably ISDN and ADSL, have a range limit, perhaps 3 to 5km from the exchange. <p>Public support will be needed to develop advanced infrastructure in rural Wales - market forces not sufficient. However there will be competition throughout Wales on services if infrastructure adequate</p> <p>Doubts satellite/radio system are answer for rural Wales but may have role to play</p> <p>As demand develops need to build partnerships with infrastructure providers with public support and aggregate public demand</p>
<p>Antur Teifi</p>	<p>Developed mobile ICT training unit for farmers - Telecabana - helped raise awareness and develop skills</p>
<p>FUW</p>	<p>Farming Connect launched - integral part is to enhance IT skills and training in agricultural industry</p>

Mid Wales Partnership	<p>Some provision of broadband services - within 3k of Aberystwyth and Newtown BT exchanges and MARAN. Need to spread provision to smaller towns and villages but will require support from the Assembly/public sector.</p> <p>MWP prepared Mid Wales ICT Action Plan to address needs of rural Wales - iterative process of raising awareness, stimulating demand, facilitating development of high speed/broadband network and training</p>
WDA	<p>Established Wales Information Society Strategy and Action Plan. Priorities are:</p> <ul style="list-style-type: none"> ● achieve knowledge based economy, and ● the availability and affordability of advanced broadband telecommunication as prerequisite to transition to such an economy. <p>Involved in Llwybr Pathway Partnership and MARAN bringing higher bandwidth services to parts of rural Wales</p>
Welsh Language Board	<p>Vital for all ICT developments to be provided in bilingual format or with clear choice between English and Welsh</p>
BT	<p>Details of existing provision by BT including Core Fibre Provision, PSTN, ISDN2, ADSL and Leased Lines.</p> <p>Take up of ADSL in rural areas has been disappointing</p>
	<p>Demand for ICT</p>
Ceredigion County Council	<p>Mid Wales Partnership Action Plan to stimulate demand, provide training and access. Cost is barrier in rural areas even for microwave systems so need to develop innovative partnership solutions. Suggest "Pathfinder" approach</p> <p>Price of Broadband Fixed Wireless Access licence in Wales too expensive @ £1m</p>
ELWa	<p>Require awareness raising of the benefits of ICT, as well as training to ensure that individuals and businesses are able to capitalise on ICT.</p> <p>Local people and businesses often prefer to deal with local ICT firms that can supply equipment, provide support services and undertake repairs within the area. It is vital, therefore, that this sector is nurtured.</p>

<p>Wales Tourist Board</p>	<p>E commerce developing strongly in tourism sector, therefore need for Welsh businesses to be in position to take advantage.</p> <p>Tourism businesses need appropriate training and support services and cost effective ways of buying/renting computer/telecom equipment</p> <p>Innovative and creative approaches needed to spread access and reduce costs - likely to need catalyst</p> <p>Visitors expect access to best possible communications systems</p>
<p>Prof Mike Tedd, Aberyswyth University</p>	<p>Demand for advanced services will increase slowly - should be no huge investment in infrastructure until demand justifies it</p> <p>Need to raise awareness by;</p> <ul style="list-style-type: none"> ● provision of advanced services to schools and other educational establishments, ● increasing availability of public access centres where businesses and individuals can make use of advanced facilities. ● wide availability of courses and advice centres.
<p>FUW</p>	<p>Demand for IT solutions for increasingly complex administration - pilot run to test software and training. Farmers needs include:</p> <ul style="list-style-type: none"> ● subsidised hardware purchase ● initial training including introduction to relevant software packages (using Telecabanas) ● in-depth training on chosen package ● development of support for hardware and software ● network of farm administrators ● access to high speed communications links

<p>NFU</p>	<ul style="list-style-type: none"> ● Need to demonstrate specific benefits of using computers as prerequisite to making skills training available to all parts of the community ● Advisors (Farming Connect local authorities etc) need to receive ongoing training to ensure they are kept abreast with latest technologies ● Constraints on availability of ISDN and ADSL should be identified and reduced or removed ● Rural Wales should have access to developing technologies and their availability should be promoted ● Businesses that would benefit from high bandwidth fibre links should be able to access them - new industrial parks should be able to provide them ● Improved access to, and use of, existing infrastructure ● Regulatory framework should not act as deterrent to investment in infrastructure in rural Wales ● Any strategy should include SWOT analysis of market for services it may generate and promotion of rural Wales
<p>WDA</p>	<p>Risks and opportunities for rural Wales:</p> <ul style="list-style-type: none"> ● Risk - infrastructure and services provided in urban areas thus excluding rural Wales from information society and new economy. Could create vicious circle; ● Opportunity - offers added value as ICT diminishes time and distance constraints and allows certain activities to be based outside population centres and public services to be delivered by ICT to sparsely populated areas <p>Need strategic, integrated partnership based approaches to aggregate demand, share resources and expertise, avoid wasteful duplication and optimise use of scarce resources. Actions required include:</p> <ul style="list-style-type: none"> ● Affordable access - fundamental issue for rural areas because of expense of provision and market failure. Will need public intervention ● Developing ICT skills - in rural population ● Stimulate demand <p>Steps needed to stimulate demand for ICT services include:</p> <ul style="list-style-type: none"> ● Encouraging commercial operators to further develop the telecommunications infrastructure; ● Encouraging greater competition in telecommunications service provision (in many areas there is a sole provider which has a de facto monopoly); ● Engagement (directly) in telecommunications service provision by the public authorities where commercial providers cannot be persuaded to operate; ● Increasing provision of public access points allowing cheap and

- convenient access to end user equipment and networks;
- A campaign to raise awareness of (a) the opportunities and risks of the Information Society and (b) what is involved in using ICTs (e.g. equipment requirements, costs, forms and costs of network access etc.) and what it can achieve, making good use of demonstrators and exemplars;
- Improved access to ICT training, support and advice

Steps needed to encourage commercial providers to respond to demand:

- Political pressure (especially on OFTEL) to ensure a level playing field for rural areas – for example, through extension of the definition of the Universal Service Obligation to include higher bandwidth services, or through modification of tariff regulations;
- Encouragement to commercial operators, where market failure can be demonstrated, to install or enhance higher bandwidth services in rural areas through subsidies or other financial means;
- Using subsidies or other financial inducements to open up competition in telecommunications provision in areas where monopoly conditions currently prevail;
- Engagement by public authorities as advanced telecommunications service providers in their own right as a means of stimulating competition or, on social grounds, to ensure provision where none is deemed commercially viable at present;
- Aggregating fragmented, individual (and thus unviable) demand into collective viable demand and organising concerted negotiations with providers on behalf of a wide range of (public and private) users.

BT

Main drivers for increasing ICT use in the community are:

- E-Government services (grant applications, monitoring returns, etc)
- Generic farming services(ie providing information services for farmers eg Farming Connect, South East Wales Association of Farmers Markets)
- Community services
- Funding - problems for providers of funding broadband development and willingness of consumers to pay for broadband services
- e-commerce (to increase market potential of rural businesses supported by case study)

Tachwedd/Rhagfyr 2001

- Gorolwg Strategol gan Uned Strategaeth TGCh y Cynulliad
- Llwybr-Pathway – Bwriad y cynllun yw amlygu buddion y Gymdeithas Wybodaeth Fyd-eang i fusnesau a phobl Cymru Wledig a sicrhau eu bod yn manteisio ar y cyfleoedd sydd ar gael.
- CyfIE Cymru – Partneriaeth o'r sectorau cyhoeddus, preifat a gwirfoddol a gyllidir drwy'r rhaglen Amcan 1. Ei fwriad yw darparu cyngor a chefnogaeth i fusnesau Cymru er mwyn eu galluogi i elwa oddi wrth TGCh. Bwriad y sesiwn hwn a'r un blaenorol fydd archwilio'r gwersi ymarferol a ddysgwyd gan brosiectau a gynlluniwyd i hybu'r defnydd o TGCh yn y gymuned a'r byd busnes.

Ionawr/Chwefror 2002

Partneriaeth Canolbarth Cymru

Awdurdod Datblygu Cymru

Bwrdd Croeso Cymru

ELWa

Unrhyw rai eraill y mae'r Pwyllgor yn dymuno eu gwahodd.