

**Servicing the capacity
constraints of today
and enabling dense
urban connectivity of
tomorrow**

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A Question...



Are we finally seeing the aggressive
growth rate of small cells?

Servicing the capacity constraints of today and enabling dense urban connectivity of tomorrow

- Where are we now
- Drivers of scale
- The Cellnex approach
- Enablers
- A role for all stakeholders



A longer journey than envisaged

Initial hype



Constraints



Finally, growth



Benefits realised to date



Economically attractive



Quick to deploy



Additional traffic captured



Benefit for commuters, businesses, shoppers and residents

Drivers of Demand

Capacity hot spots

Spectrum constraints

Improving business case

Ease of deployment

Availability of assets and equipment

Starting to prepare for network densification....

Drivers of Scale

Network densification

Further improving business case

New architectures – C-RAN etc.

Greater asset availability

New Spectrum in mmWave bands

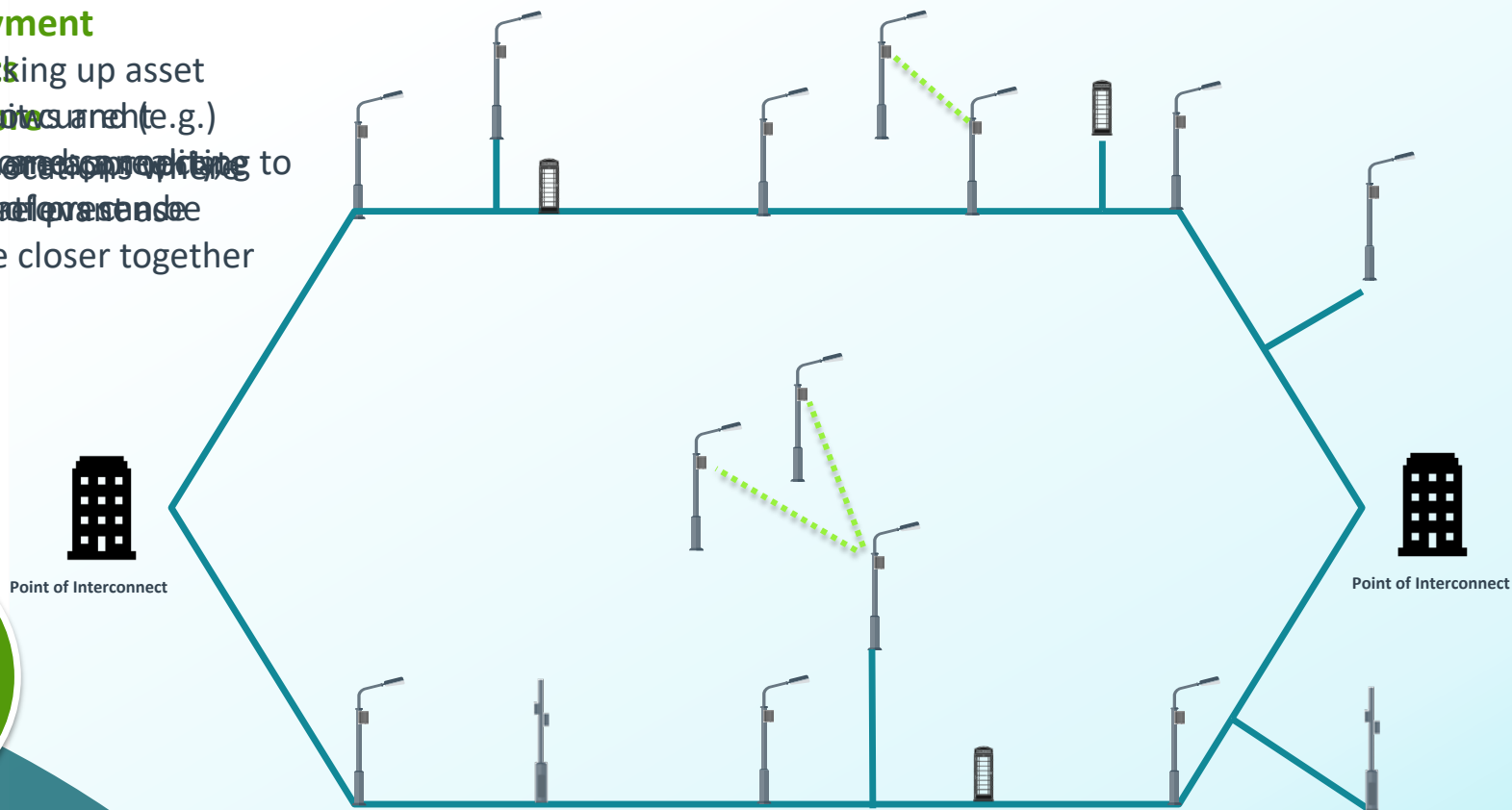
New equipment, greater shareability

New use cases

What can we do now that also enables tomorrow?

Initial deployment

Adding assets - picking up asset
Extending fibre - e.g. to
Additional homes - connecting to
Additional point of presence
nodes become closer together



Assets
& Fibre

Who needs to do what?

MNOs

**Move SCs up the priority list –
ramp-up strategic engagement**

Align budget planning

**Use our testbeds for trialling
new architectures and
technologies**

Or....

NH Providers

**Provide for flexibility of
technical architecture**

Provide investment

**Make it simple for MNOs and
other stakeholders**

**Continue to drive engagement
across all stakeholders**

Stakeholders

Make more assets available

Swift permissions

**Alignment on ‘competing’
demands for assets**

mmWave Spectrum

** Expected c.2023*

**Take the digital inclusivity
viewpoint**

So, are we finally seeing the aggressive growth rate of small cells?



Thank you

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