



How to make money in telecoms

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The strange case of 5G – what went wrong?



The promise and reality of 5G

- Ultra-fast speeds, low latency, and high capacity promised to revolutionize industries.
- Initial concerns about mid-band MIMO and compatibility with existing infrastructure.
- Realities of deployment: challenges in business case, ROI, consumer adoption, and revenue generation.



Complexity of change: pace + over-specification =

- Industry urged on by policy-makers to deliver 5G deployments for early adopter advantage.
- Deployment strategies prioritized speed over sustainability.
- Over-specification of 5G technology outpaced actual deployment.
- Open RAN initiative was beneficial, but timing?



Lukewarm customer response

- User experience and pricing issues led to consumer skepticism.
- Consumers reverted to 4G due to insufficient perceived value.
- Wi-Fi and LTE remained predominant choices in enterprise.





How to make money in telecoms – changing the paradigm



Collaborative ecosystem for innovation

- Collaboration beyond MNOs to include new players like integrators, alternative and private network operators.
- ...and hyperscalers.
- Inclusivity needed for successful innovation and deployment.
- Collaborations focus shift from access technologies to broader topics in networks and connectivity



Shifting paradigms in telecommunications

- Move away from generational labels like 3G, 4G, 5G to new paradigms.
- Identification of emerging & converged platforms for value creation.
- Identify the stacked use cases that make local, specialized service provision profitable and practical
- Acknowledgment that paradigm shifts take time to mature.

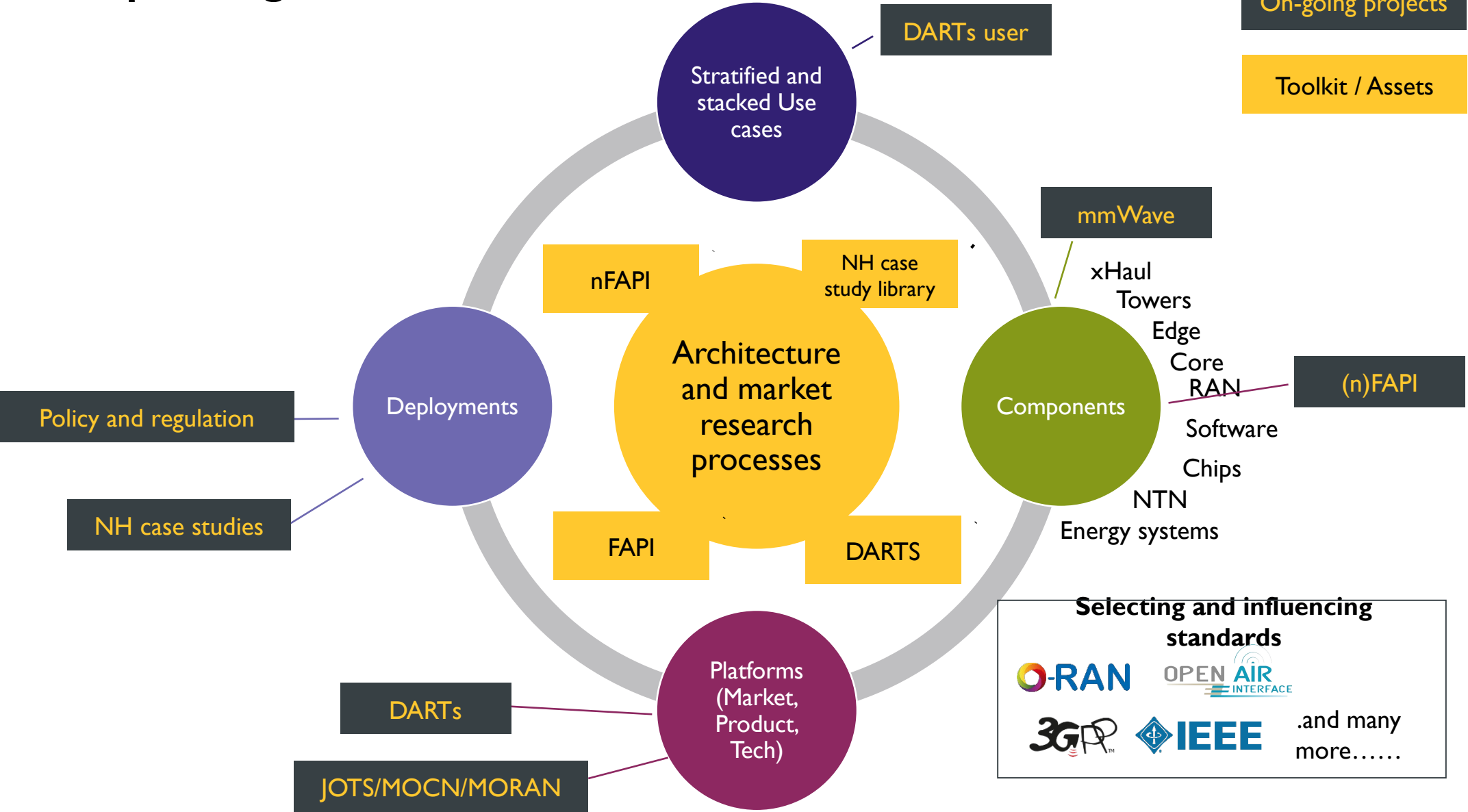


Innovations at the Edge

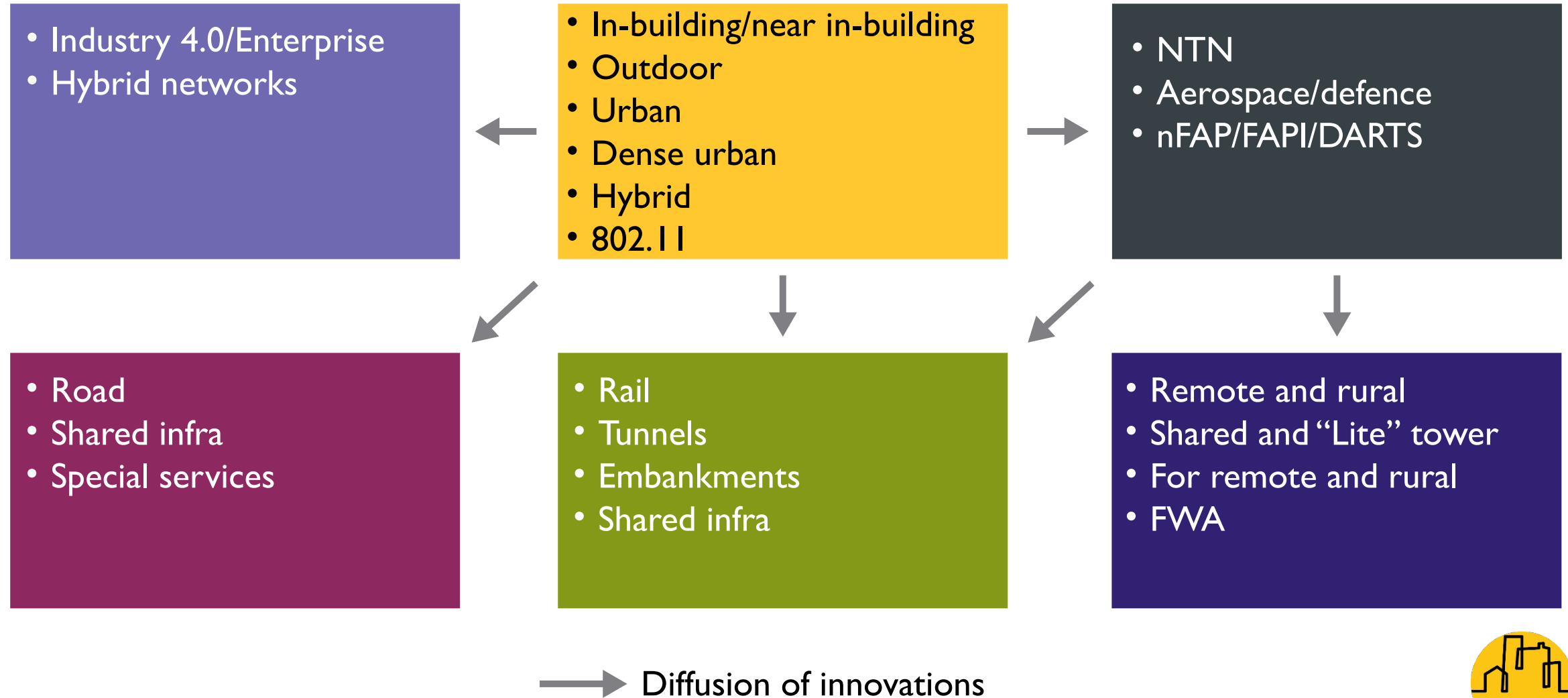
- A default assumption of rip and replace is not an option.
- Finding the paths of least resistance to commercial success through architectural innovation.
- Each multi-purpose network has its enabling path to public, hybrid, private operating models.
- Redefining the network operator.



SCF Operating Model



Industry is delivering multi-operator multi-purpose networks



SCF's Mission

- Drive innovation, collaboration, and best practices in **multi-purpose networks**.
- Emphasis on efficiency and **precision in investment**.
- Exploring **economics**, technologies, and **regulations** of specialized **networks**.
- Socializing global innovation and promoting **industry proof points** for real customer requirements and **stacked use cases**.
- Championing **Open Networks principles**



SCWS 2024 AGENDA

Tuesday 23 April

09:00 State of the industry keynotes

- Welcome to SCWS, Simon Fletcher, Chief Strategy Officer, SCF; Sue Monahan, CEO, SCF
- **Analyst panel:** Movers and shakers 2023 – Challenging markets, and technology reality checks on 2023
 - Moderator: Simon Fletcher, Chief Strategy Officer, SCF
 - Caroline Gabriel, Analysys Mason and SCF Content Director
 - Monica Paolini, Analyst, Senza Fili
 - Gabriel Brown, Analyst, Heavy Reading
- **Keynote panel:** How was it for you? 2023 perspective from the view of MNO, neutral host and vendor
 - Moderator: Caroline Gabriel, Analysys Mason and SCF Content Director
 - George Tsirtsis, Senior Director of Technology, Qualcomm Europe, Inc.
 - Abel Mayel, SVP of Technology and Marketing, Airspan Networks
 - Imran Ashraf, Senior Manager – Small Cells Planning, Virgin Media O2
 - Dr Khalid Al Mashouq, Chief Technology Officer, ACES

10:05 Session one: 2030 networks – technology roadmap to 2030

- **Session keynote:** Bringing ORAN indoors, Luigi Tarlazzi, VP, Engineering ICN, CommScope
- 5G and densification: A reality check – how are we doing, what have we learned and where's it going?
Mike Harrison, Head of Products, Solutions and Marketing, Cellnex UK

10:55 Coffee break and networking

11:20 Session one continued:

- Everything but the macro – small cells and DAS, and WiFi: convergence and disaggregation,
Andrew Conway, Director of Solutions and Innovation, Boldyn Networks
- **Technology keynote:** Silicon vendor perspective on 5G infrastructure advancements,
George Tsirtsis, Senior Director of Technology, Qualcomm Europe, Inc.
- Common sense is all you need, Dr Doug Pulley, Chief Technology Officer and co-founder, RANsemie
- **Panel:** Open RAN reality check: What are we waiting for? Part 1: The view from vendor, analyst and service provider
 - Moderator: Ian Newbury, Consultant
 - Bob Slorach, Chief Technology Officer, Wireless Infrastructure Group
 - Richard MacKenzie, Distinguished Engineer – Wireless Networks, BT Group
 - Luigi Tarlazzi, VP, Engineering ICN, CommScope
 - Caroline Gabriel, Analyst, Analysys Mason



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12:50 Lunch break and networking

13:40 Session two: Delivering digital transformation

- **Session keynote:** Digital transformation and public policy, Peter Whale, Programme Manager, UKTIN
- West Sussex and Dense Air: Working together to solve coverage and capacity problems,
Sarah Bazen, Digital Infrastructure Strategic Lead, West Sussex County Council;
Paul Trubridge, SVP Global Solutions Strategy, Dense Air
- Connecting the unconnected: Regulation, technology and economics, Neil J. McRae, Mobile Networks Consultant
- Futureproofing and streamlining deployment, Mark Reudink, Product Development Senior Director, Battelle
- **Panel:** Progressive regulation and best practice – a global perspective
 - Moderator: Richard Haas, Analyst, PolicyTracker
 - Ahmed Al Shaikh, Network Operation Senior Consultant, STC
 - Richard Moore, Principal, Spectrum Policy & Analysis, Ofcom
 - George Aguilera, Systems Architect, Crown Castle
 - Phil Cooper, Director, Digital Infrastructure Accelerator

15:40 Coffee break and networking

16:05 Session three: Pathways to densification

- **Session keynote:** Establishing a premier global neutral host provider, Dr Khalid Al Mashouq, Chief Technology Officer, ACES
- **Panel:** Back to the future: MOCN, MORAN and JOTS – time for a global sharing template?
 - Moderator: Simon Fletcher, Chief Strategy Officer, SCF
 - Gabriel Perez, Technical Director, Airspan Networks
 - Steven Gallagher, VP EMEA Sales, SOLiD
 - Tom Bennett, Chief Technology Officer, Freshwave
 - David Morris, JOTS Forum and Radio Engineer, Virgin Media O2
- Customer satisfaction – The neutral host way, Stuart Holyoak, Director, DAS and Small Cell Business Development – EMEA, CommScope; Tom Bennett, Chief Technology Officer, Freshwave

SCWS 2024 AGENDA

Wednesday 24 April



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09:00 Session four: Getting real about the future

- **Fireside chat:** What the market is telling us – 2024-30 service provider survey results
 - Caroline Gabriel, SCF Content Director
 - Keith Dyer, Editor, The Mobile Network
- Power saving and infrastructure cost and sustainability, Mike Rosenberg, CEO, Circadian Technologies GmbH
- Disaggregation, use cases and choice: What the SCF DARTs initiative tells us, Ryan Husbands, SCF Work Item Lead and Research Specialist, BT Group
- NTN opportunities, Gerry Collins, Director, Product Management, Mobile Networks, Intelsat
- **Panel:** Open RAN reality check: What are we waiting for? Part 2 (industry view)
 - Moderator: Monica Paolini, Analyst, Senza Fili
 - Jack Nasielski, O-RAN Alliance
 - Irfan Ghauri, Director, OpenAirInterface
 - Simon Fletcher, Chief Strategy Officer, SCF

10:50 Coffee break and networking

11:20 Session five: The new service model ecosystem

- **Session keynote:** The evolving neutral host value proposition, Ganesh Shenbagaraman, Head of Standards, Regulatory Affairs & Ecosystems, Radisys
- **Panel:** MNOs and the future of service delivery
 - Moderator: Ian Newbury, Consultant
 - Muhammad Aitsam Goraya, BT Wholesale
 - Soufiane Ayed, Senior RAN Strategy & Architecture Manager, Three UK
 - TBC
- A flexible approach to service delivery, Andy Hobbs, Chief Technology Officer, Dense Air
- **Panel:** Hyperscalers, private network service providers, system integrators
 - Moderator: Sue Monahan, CEO, SCF
 - Rory O'Toole, VP Sales, Druid Networks
 - Andy Hobbs, Chief Technology Officer, Dense Air
 - Ganesh Shenbagaraman, Head of Standards, Regulatory Affairs & Ecosystems, Radisys

11:45 SCF x TowerXchange workshop (Invitation only):

- 6G: Navigating technologies, convergence, and regulation, Simon Fletcher, Chief Strategy Officer, SCF

13:00 Lunch break and networking

13:45 SCF x TowerXchange workshop (Invitation only):

Bridging the gap: Shaping effective communication regulation, Jussi Kahtava, SCF Vice-chair Regulatory and Policy Group and Spectrum & Standards Engineer, Dense Air

14:00 Session six: Emerging business models – challenges and opportunities

- **Session keynote:** Smarter cities and communities – Infrastructure evolution not revolution? Abdulrahman Al Moaiqel, Chief Commercial Officer, TAWAL
- Delivering value with edge services: Challenges and opportunities, Mark Toman, Client Director, BT Wholesale
- In-building service delivery: Challenges and opportunities, George Aguilera, Systems Architect, Crown Castle
- **Panel:** 5G mmWave use cases
 - Moderator: Simon Fletcher, Chief Strategy Officer, SCF
 - Vicky Messer, VP of Products, Picocom
 - Ali Akhtar, Head of Acquisitions, BT Wholesale
 - Dirk Devisch, Business Development Director, iCana

15:40 Coffee break and networking

14:00 Session six continued:

- Active sharing and the towerco to neutral host continuum, Jamie Hayes, Chief Sales Commercial Officer, Cornerstone
- Insights from the High Density Deployment Innovation investments of the UK Government, Simon Rowell, Head of Market Development, Department of Science, Innovation and Technology (DSIT), UK Government
- Closing remarks, Sue Monahan, CEO, SCF