

SMALL CELLS WORLD SUMMIT

Active sharing and the TowerCo to Neutral Host continuum

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THE CONTINUUM- IaaS, PaaS, CaaS

WHY

ENSURING YOUR CONNECTED WORLD IS ALWAYS WITHIN REACH

WHAT

Towers (passive infrastructure – IaaS/PaaS)

MNO IaaS

MNO PaaS (e.g. solar/wind)

Industry and society IaaS

Special Purpose Area Networks (Neutral Host/Small Cells/DAS Venues)

MNO-funded (e.g. events)

Venue-funded (e.g. real estate)

Industrial enterprises

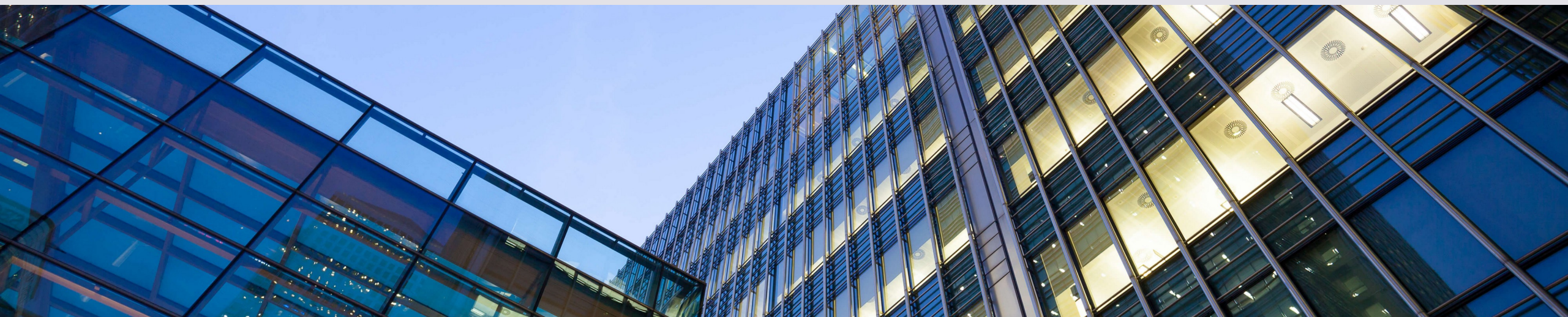
Connected Communities

Rural coverage

Urban capacity

Smart City / Defence

Delivery, landlord and estates relationships including public sector are the foundation of Cornerstone's market reputation and credibility





Airbnb Superhost going beyond Neutral Host or TowerCo



- Highly-rated host consistently provides excellent hospitality to guests; top performers on the Airbnb platform
 - Outstanding ratings, experience, reliability, responsiveness
 - Guests book with more confidence, get more positive stays, and the hosts get higher promotion in the rankings, higher bookings and sometimes charge more
 - +79% overall approval rating from landlords (1)
 - +75% landlord satisfaction with operational capability (1)
 - (i.e. site access arrangement for build/ operate/ rental payments)

Note (1) as of Sept'23 survey



Airbnb Superhost going beyond Neutral Host or TowerCo



EXPERIENCE

- Two decades of reliably and responsibly delivering digital infrastructure (IaaS) to all four mobile network operators and industrial tenants (e.g DAB/FM radio, MW/ mmWave)

LARGEST DIGITAL INFRASTRUCTURE ESTATE FOR MOBILE IN THE UK

- 7000+ greenfield sites, 3000+ rooftop sites, 4800+ streetworks sites and 1000+ special purpose area networks
- 835km² equivalent to 100,000 football pitches

DIVERSE INVESTORS

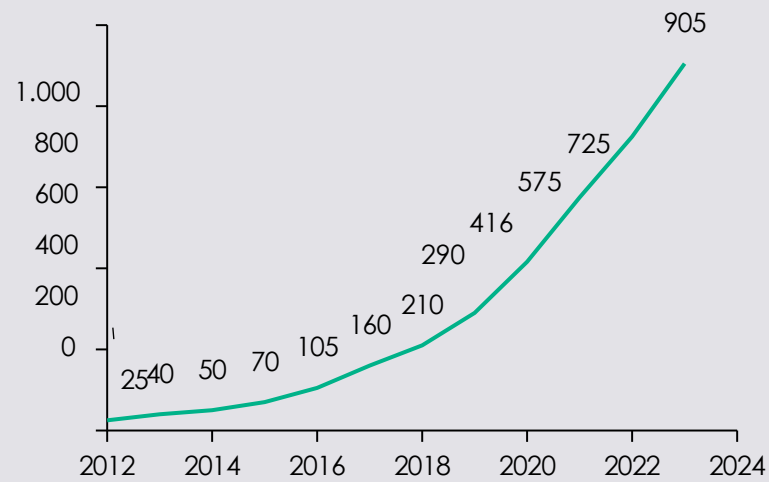
- GLIL
- KKR
- Blackrock
- Vantage Towers

LOWEST INTERSITE DISTANCE PER GEOTYPE

- | | |
|---------------|---------------------|
| • Dense Urban | 0.15km ² |
| • Urban | 0.14km ² |
| • Suburban | 0.64km ² |
| • Rural | 1.72km ² |

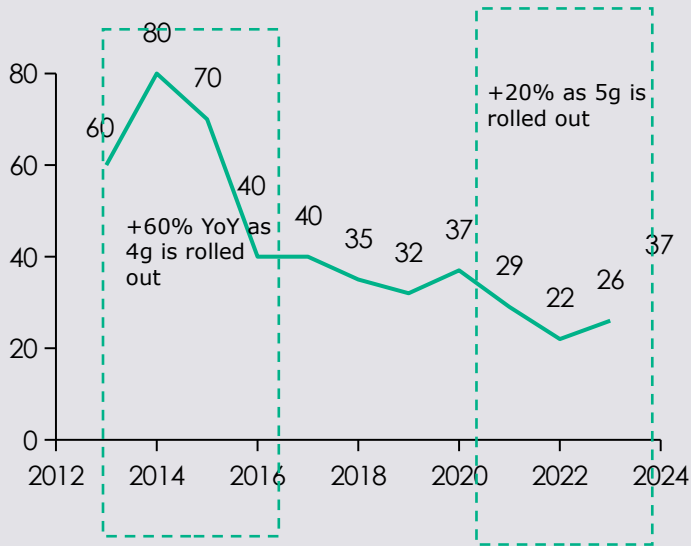
Data Traffic is growing the most it ever has in absolute terms but fails to deliver resulting revenue growth

UK TOTAL DATA TRAFFIC (UL + DL) PETABYTES



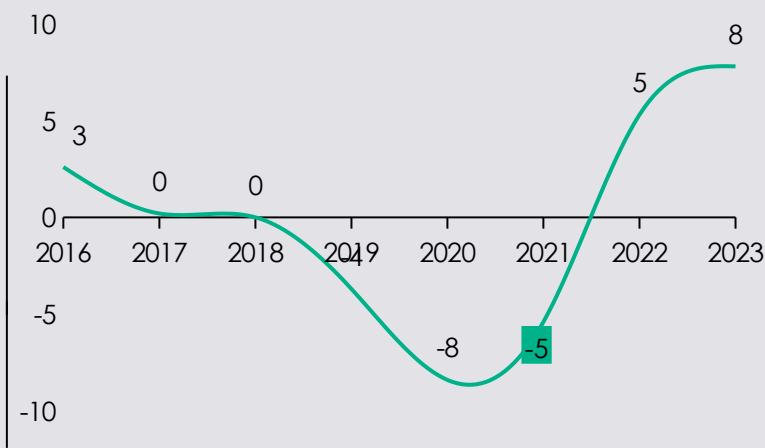
Additional Spectrum – 73% over last 10 years (c. 1x)

UK MOBILE DATA GROWTH, QUARTERLY YOY GROWTH



Technology upgrade – directional antennas / beamforming mMIMO (c.3x)

UK MOBILE NETWORK OPERATOR (MNO) QUARTERLY YOY REVENUE GROWTH (RETAIL) %



Densify the number of sites

30% growth rate – 14x in 10 years

Notes: (1) Some discrepancies possible due to methodology changes over the years
Sources: Ofcom

IaaS, PaaS, CaaS TO PROVIDE GREAT OUTCOMES IN ACTIVE SHARING



LANDLORDS & PROPERTY



TELECOMMUNICATIONS



VENUES & FESTIVALS



LOGISTICS & MANUFACTURING



LOCAL AUTHORITIES



CONSTRUCTION

PUBLIC SECTOR/LANDLORD RELATIONSHIP

Access to Infrastructure; where mobile is never a unique use-case

MOBILE NETWORK OPERATORS/ INDUSTRIAL TENANTS

Great guests also have to know the volume of their demand

IMPLICATION FOR A SUPERHOST?

By knowing the location and volume of demand, provide the best possible match, for the least amount of required digital infrastructure



CASE STUDY

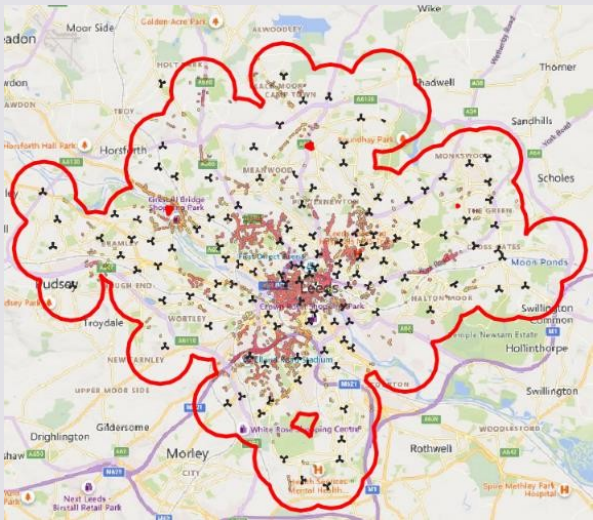
Leeds City Council



Leeds

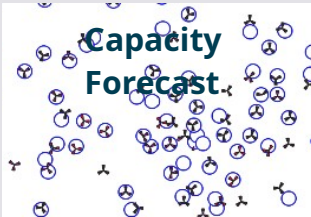
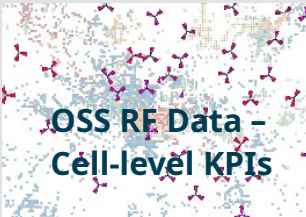


Existing grid : 139 km², 137 high capacity sites

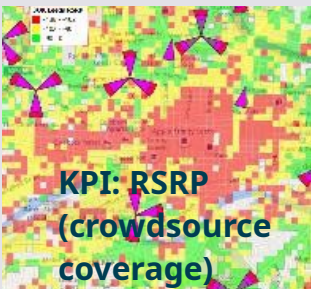
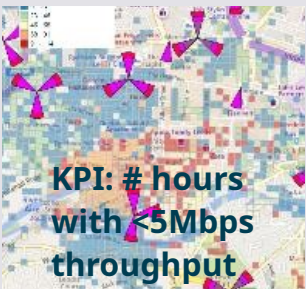
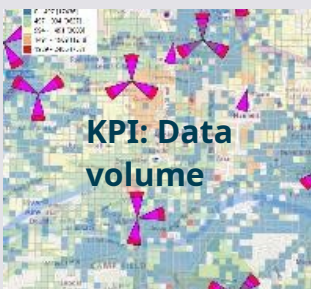
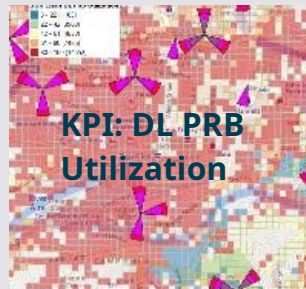


Design summary : 294 recommended over 139km², 2.1 small cells per km²

Where is the demand?



How to ensure least volume of sites required?

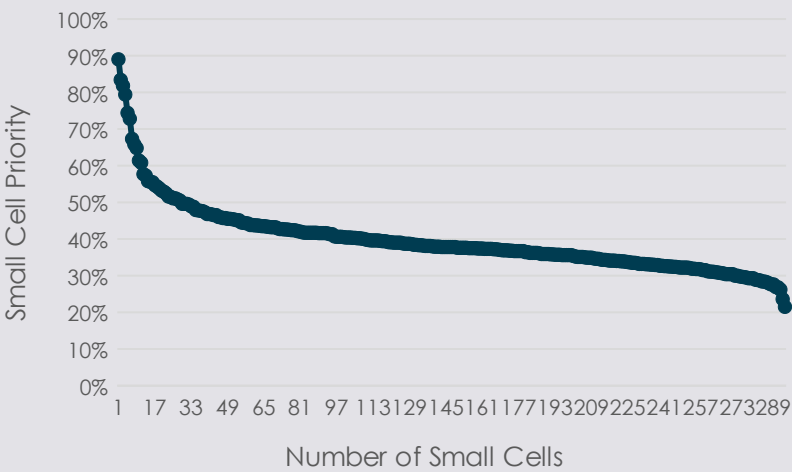


Observations

- Major RF problem areas mostly due to a lack of macro sites
- Poor coverage drives many capacity issues, especially in central areas
- Most problem areas in Leeds have fiber and cell site locations available
- Several macro sites in central Leeds could benefit from carrier adds
- Downtown Leeds suffers from poor coverage more than high data demand. Poor radio conditions lead to poor spectral efficiency which drive up PRB utilization and very slow users speeds

Observations

Leeds Small Cells By Priority / Impact



THANK YOU

