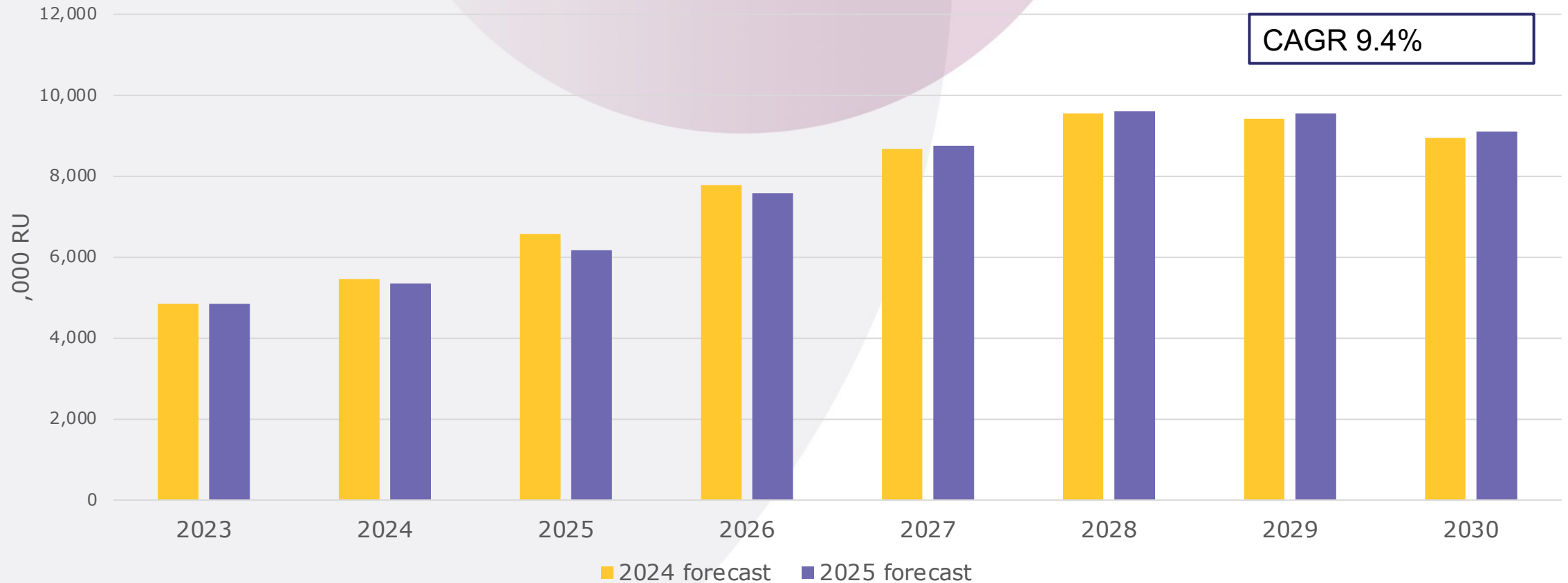




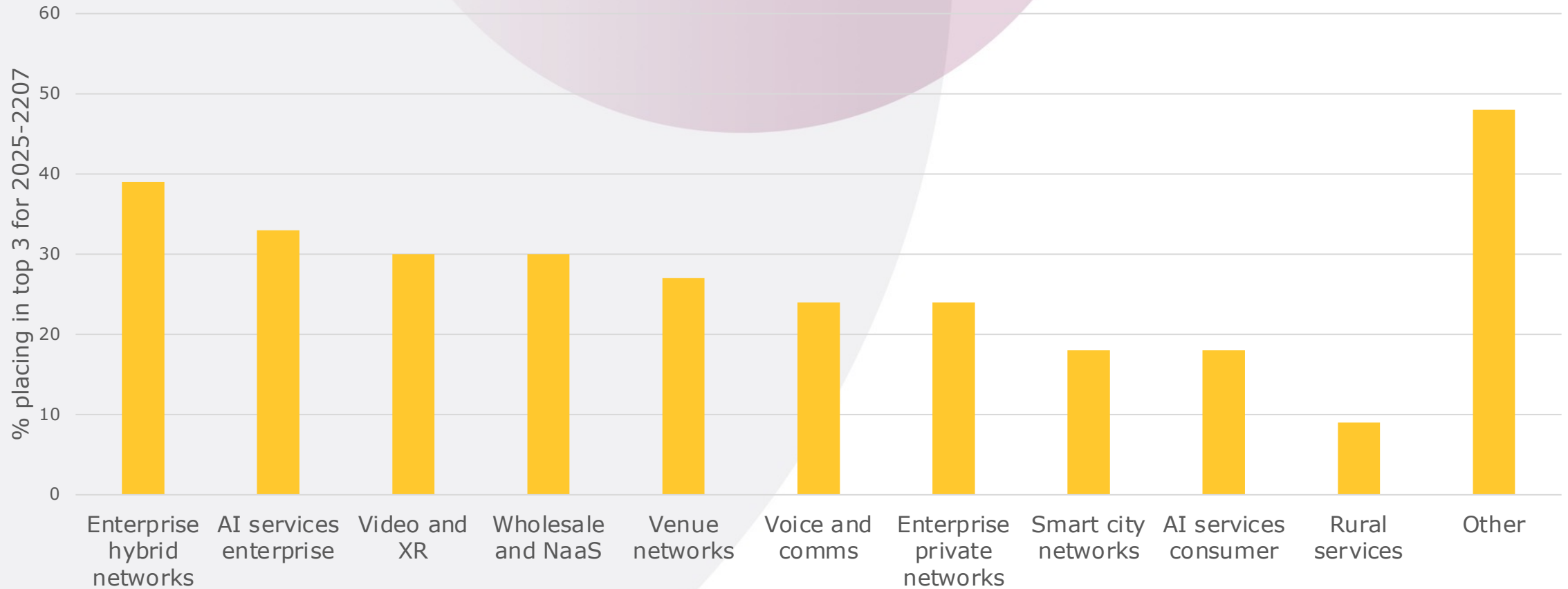
Small cells: market forecast insights

Caroline Gabriel, SCF content director

Capex caution will change deployment patterns and create pent-up demand

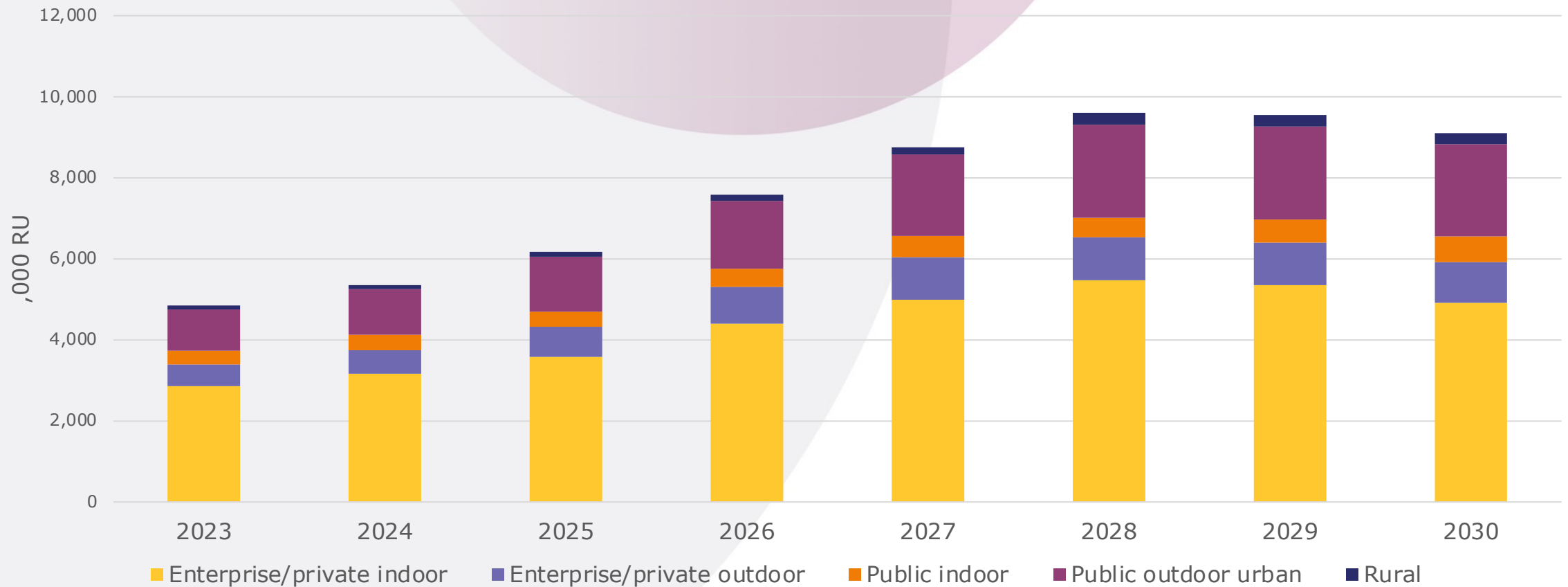


Unique SCF survey is the key input to the forecast, highlighting drivers of investment



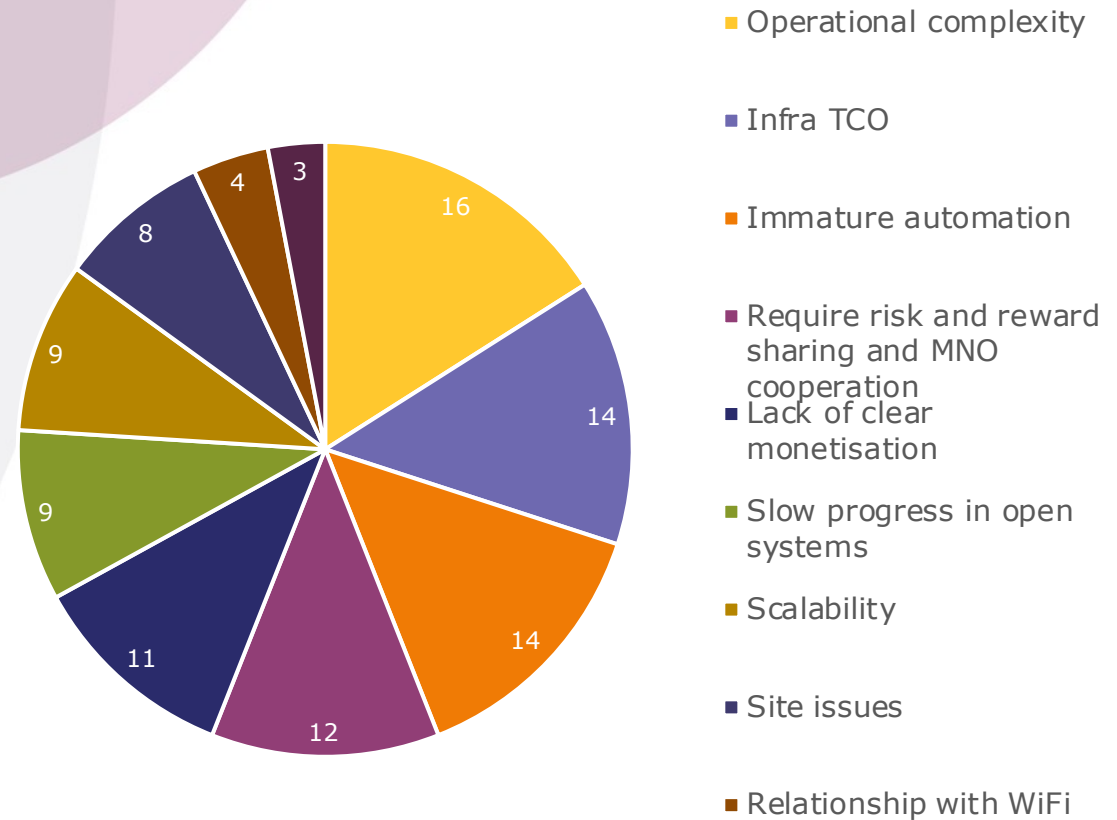
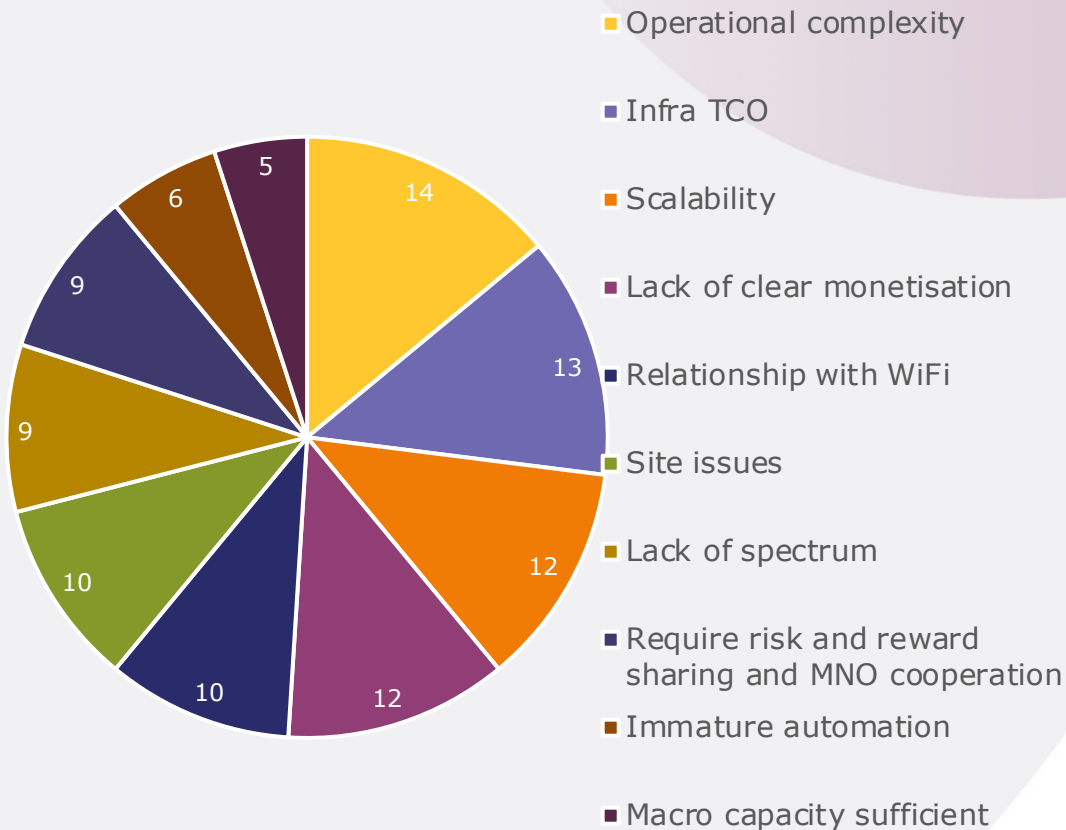
Key commercial drivers for small cell deployment (drivers placed in top 3 for projects starting 2025-2027)

Indoor enterprise networks are the engine of deployment and innovation

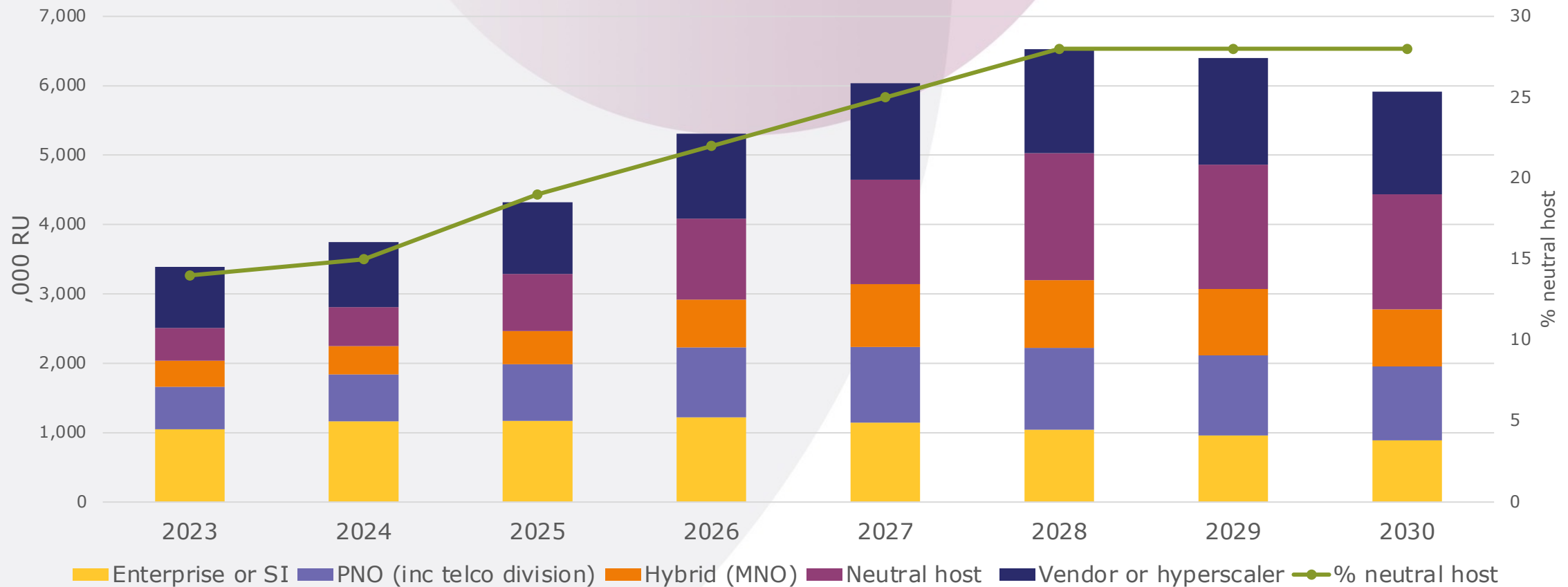


Deployments of small cells by environment 2023-2030

Some barriers are lower, such as sites and spectrum; new hurdles relate to scale

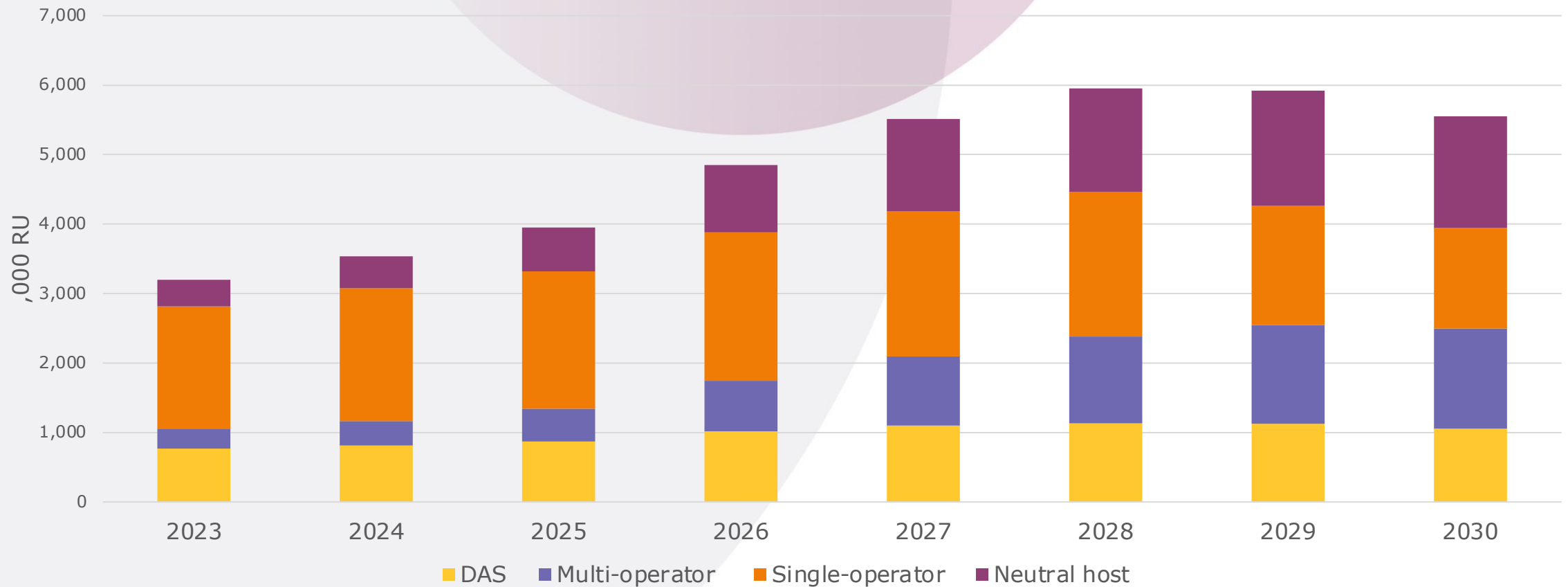


Diversity of deployment and investment models remains critical to growth



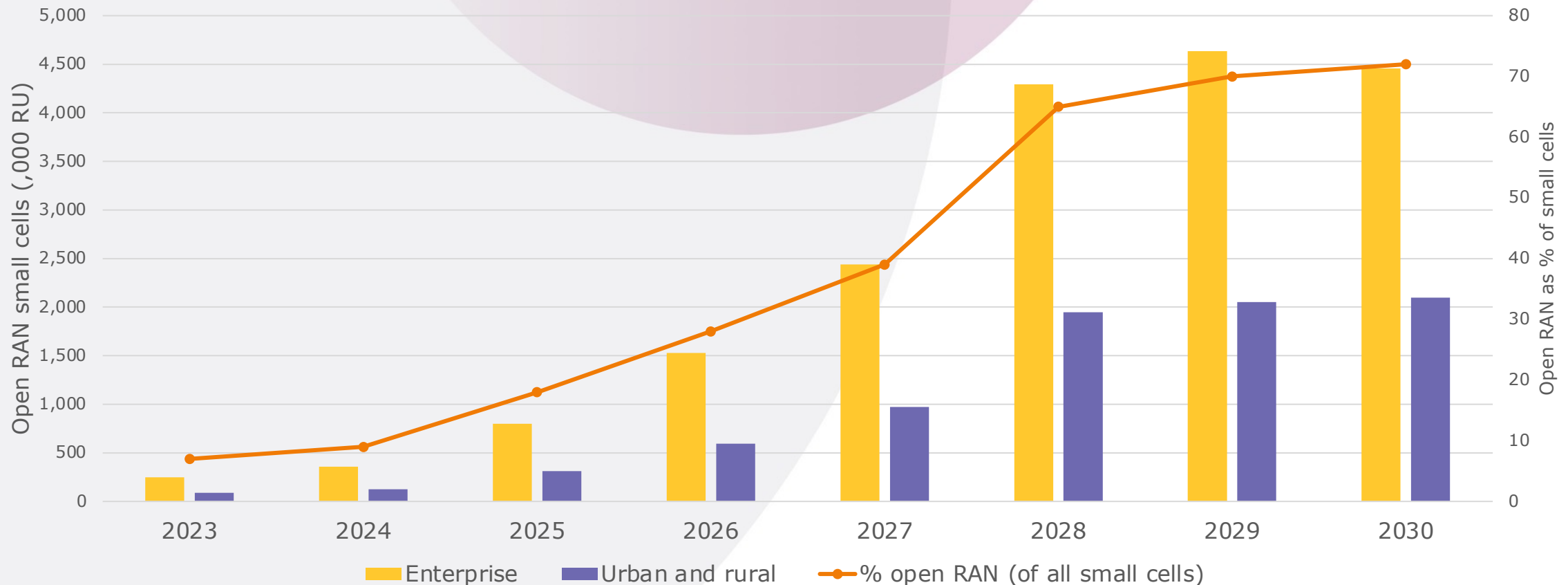
Small cell deployments by business model of deployer 2023-2030

Shared infrastructure particularly drives in-building innovation, helped by blueprints



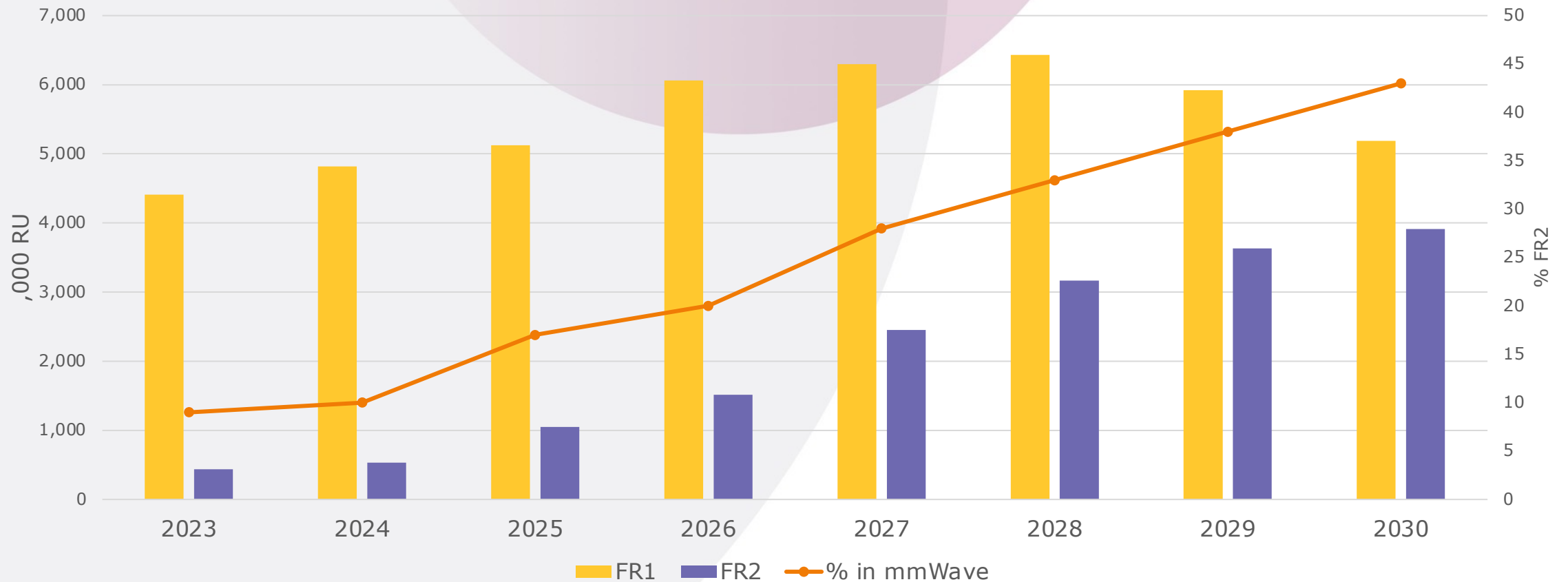
In-building small cell deployments by ownership model 2023-2030

Enterprise requirements will drive breakthroughs in open networks from 2026



Deployment of standards-based small cell networks with open RAN as a percentage 2023-2030

Some specialist deployment environments will spur use of new spectrum



Deployment of small cell networks by spectrum range 2023-2030



Thank you!