

# Demonstrating ROI: the neutral host advantage

*Neutral host value proposition*

Simon Frumkin, CEO  
SCWS 2025



**FreshWave**  
*You're on*



# Enterprise-pays



Freshwave connect a building footprint of **36.6 million sq ft**

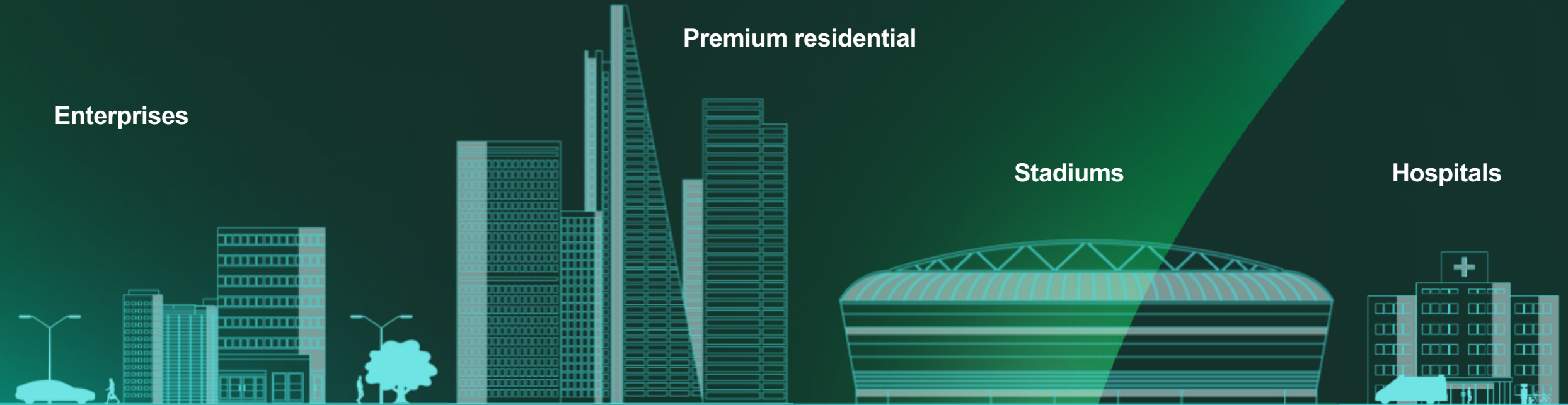
From co-working to premium real estate and across the public sector

Enterprises

Premium residential

Stadiums

Hospitals



# The Mobile Connectivity ROI Index 2025

How better indoor mobile coverage could boost the UK economy



 FreshWave  
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## Our first annual Mobile Connectivity ROI Index

Our **Mobile Connectivity ROI Index** found that business leaders believe:

Just **5 minutes** of poor current connectivity a day reduces annual productive time by **1%**

Poor current connectivity costs the UK **£100 bn** per year in productivity losses

That the public sector and professional and financial services organisations **suffer the most** from poor current connectivity



# Freshwave connect the equivalent of >60x the average London skyscraper's footprint



- Only mobile connectivity provider able to bring 4G from all UK mobile network operators indoors via a combined small cell unit
- Fastest growing UK neutral host







Providing  
more  
sustainable  
connectivity at  
**SIDARA**  
**Omni Network**



Providing the UK's first  
multi-operator 5G stadiums

Enabling digital connectivity in  
the NHS



**Outdoor small cells**  
delivering 4G and 5G  
connectivity to the  
**City of London**



# #IsItOmni

Mobile private network  
with **Caterham Racing**  
**Series**





# Key Freshwave firsts



Freshwave helped pioneer the **first open access agreement** meaning **mobile network operators** can more easily access council-owned street assets

e.g. Birmingham City Council



The **first neutral host** to provide **all UK mobile network operators on 4G** via a **combined small cell unit**

e.g. Omni Network

The first to deploy the **enterprise-pays model** in the UK: providing **fully-managed, multi-operator small cells**

e.g. AECOM





# Indoor coverage customer types are expanding



**>36.6 million sq ft**  
**300+ customers**  
e.g. 22 Bishopsgate

**Landlord-pays for basement to top  
floor connectivity including the lifts**  
e.g. One Nine Elms

**Pay-as-you-occupy  
(PAYO) customers**





# Including in the public sector

## 40% of top 100 customers now public sector organisations



e.g. The Princess Alexandra Hospital

**x8 hospitals**  
**2 million+ citizens**  
**connected**

e.g. Midland Metropolitan  
University Hospital

**Central gov and**  
**universities**  
**unlocked with**  
**Omni Network**





# Small cell innovation broadens customer base



700+ OSCs live  
100+ CRAN sites

>2.5 million sq ft live or in delivery  
since launch with Omni Network on  
the ANDREW RP5000

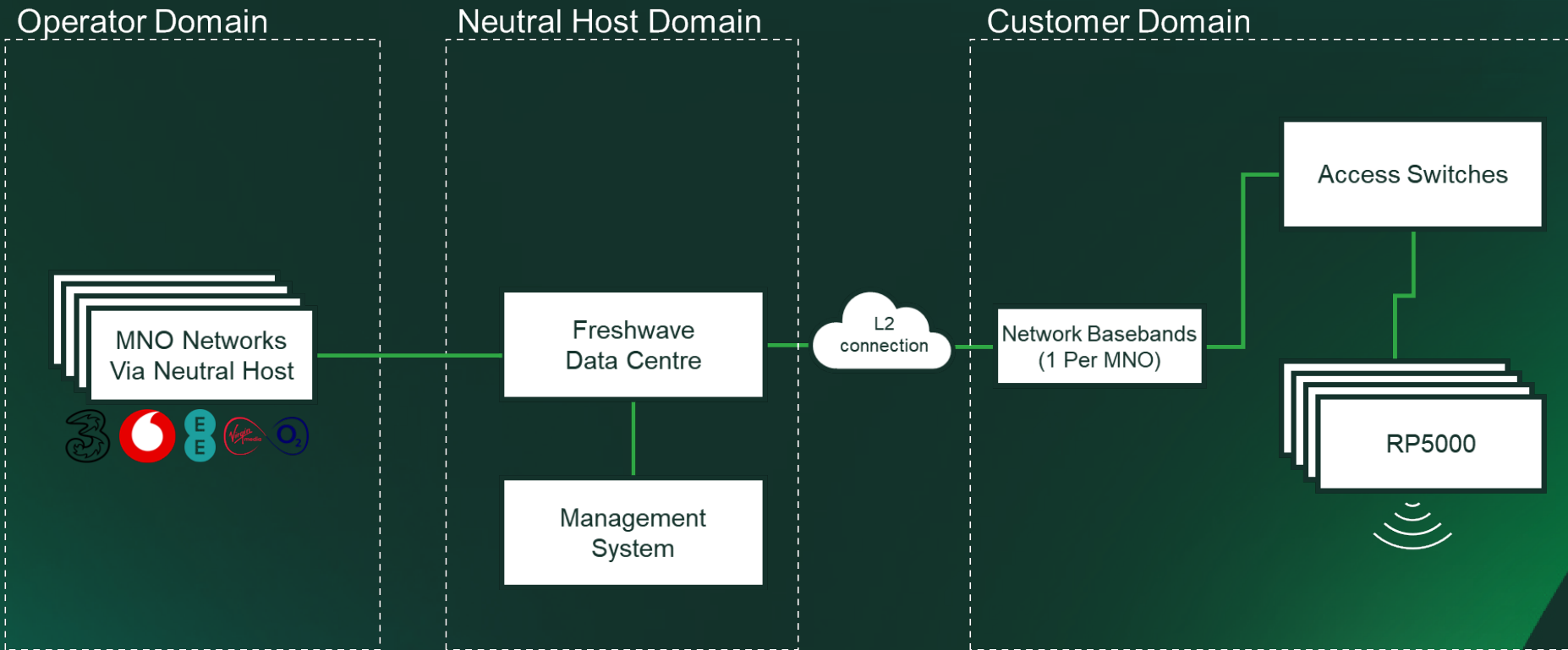


e.g.  
The City of London  
(EE expansion)

e.g. x2 of  
Workspace  
Group estate



# Omni Network, a world first innovation for all



delivering all MNOs  
via the **ANDREW**  
**RP5000**





# 2.5 million sq ft of UK real estate live or in build with Omni Network

Omni Network signals a new era of bringing assured connectivity to where it's needed the most.



Improved  
ESG performance



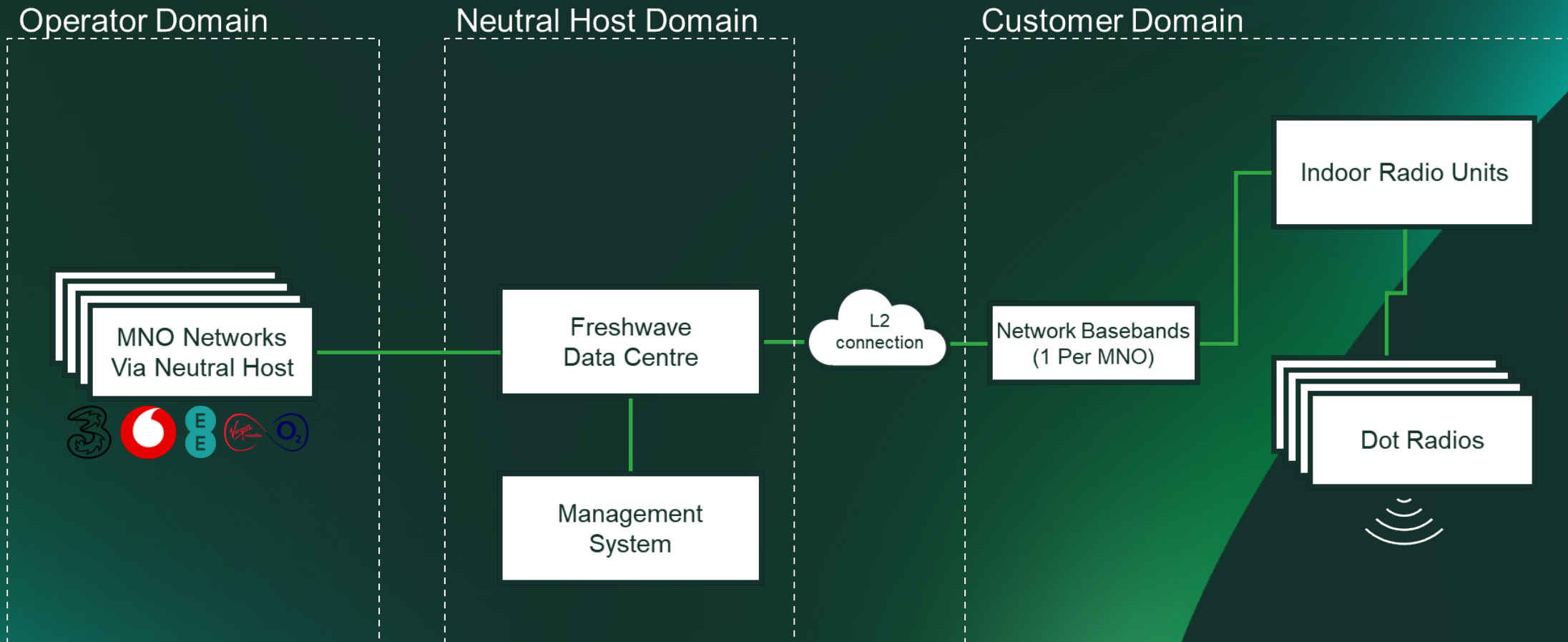
Assured  
network security



# Indoor neutral host 5G small cells



- Multi-operator connectivity delivered via the Ericsson Radio Dot
- 5G and 4G neutral host multi-operator small cells now live
- Supply chain diversity assured with multiple vendors





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