

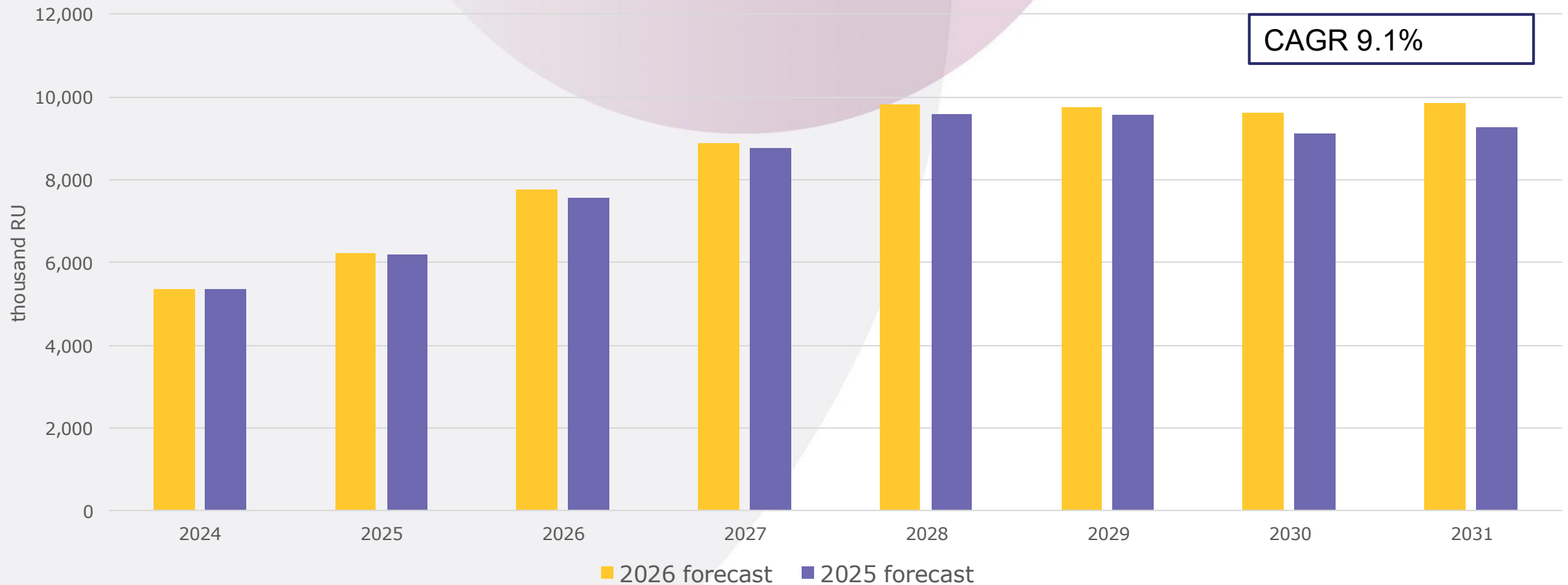


Small cell market analysis for 2026-2031 – how to capitalize on growth forecasts

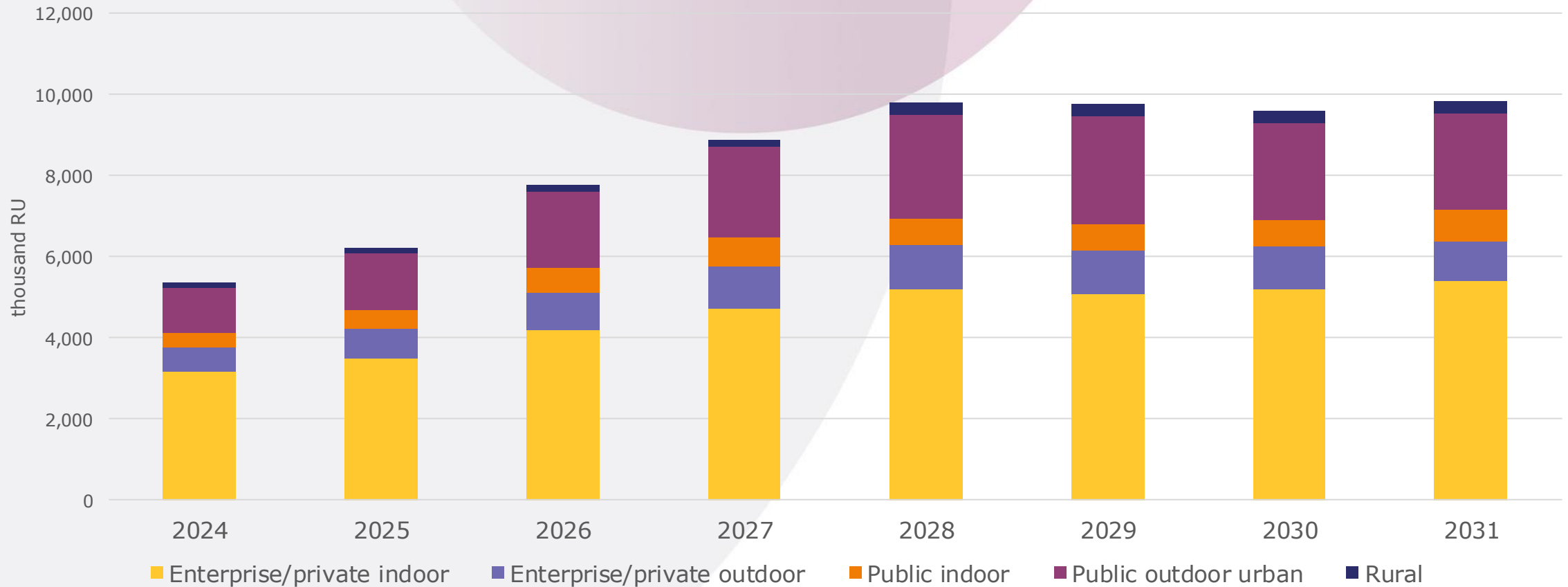
Caroline Gabriel, SCF content director



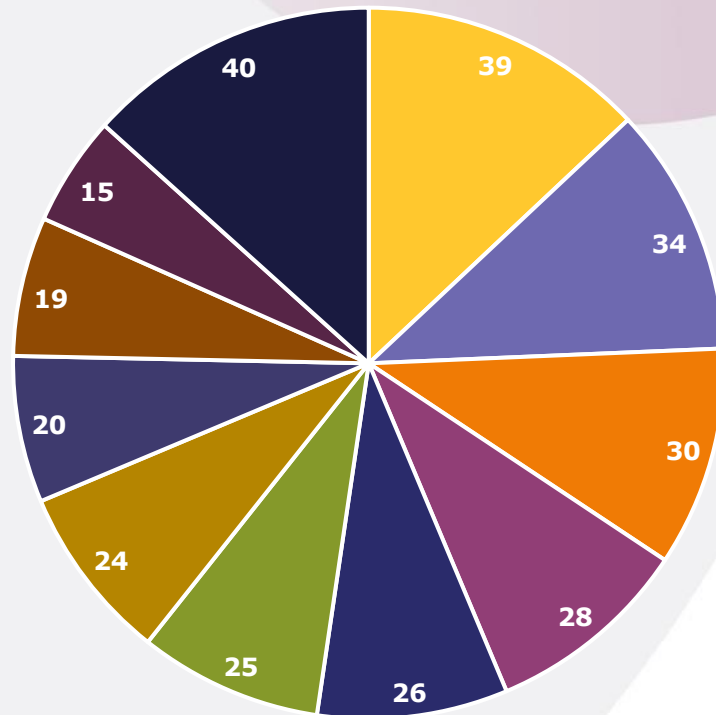
Forecast improved over last year's as operators look for near-term practical solutions



Enterprise remains the powerhouse but there is new momentum in public spaces

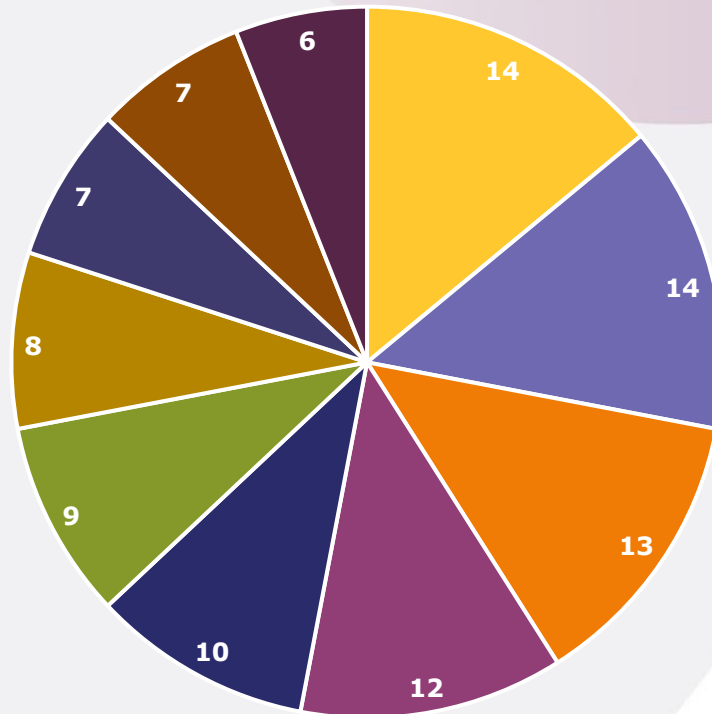


Drivers for adoption remain enterprise driven but flexibility is key



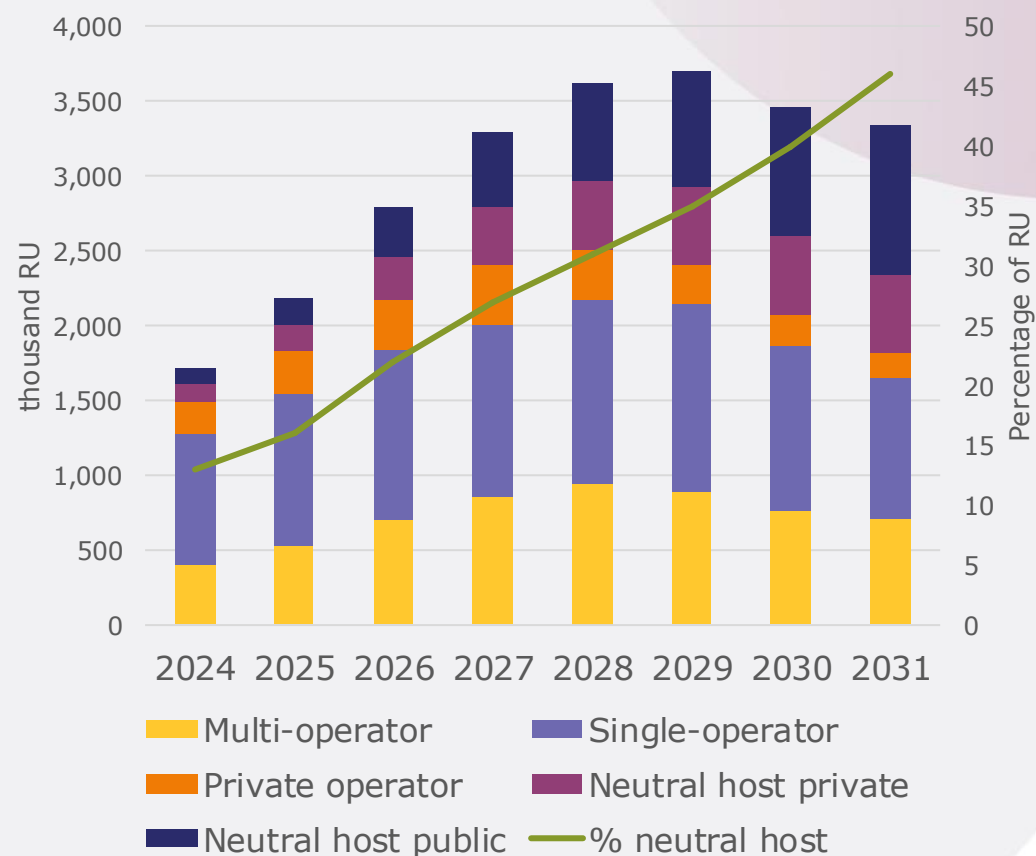
- Enterprise hybrid networks
- Enterprise private networks
- Cloud/AI operations
- Enterprise AI services
- XR consumer experiences
- Business-critical communications
- Smart city networks
- Venue networks
- Rail and road networks
- Wholesale and NaaS
- Other

Capitalisation will depend on continued cooperation to lower barriers

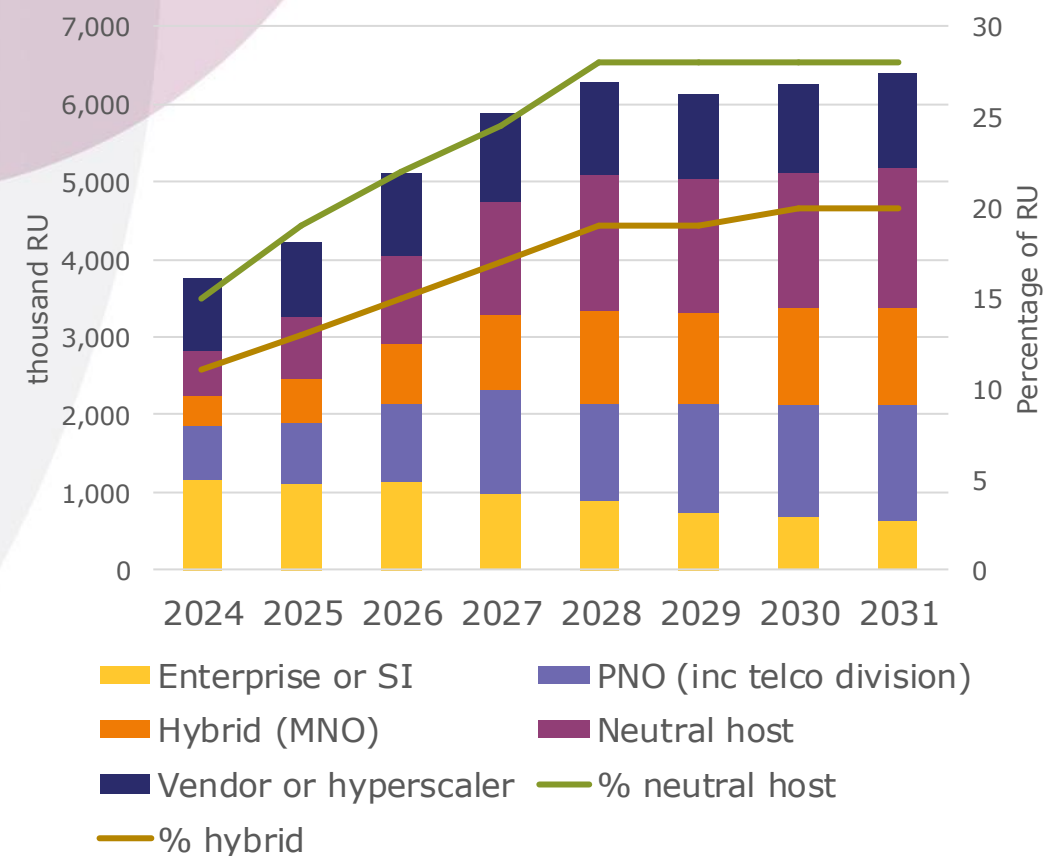


- Lack of clear monetisation
- Immature automation/AI
- Operational complexity
- Infra TCO
- Require risk and reward sharing and MNO cooperation
- Site issues
- Uncertainty about 6G
- Scalability
- Slow progress in open systems
- Spectrum shortage abating

Optimising for neutral host models will be important to monetisation for all

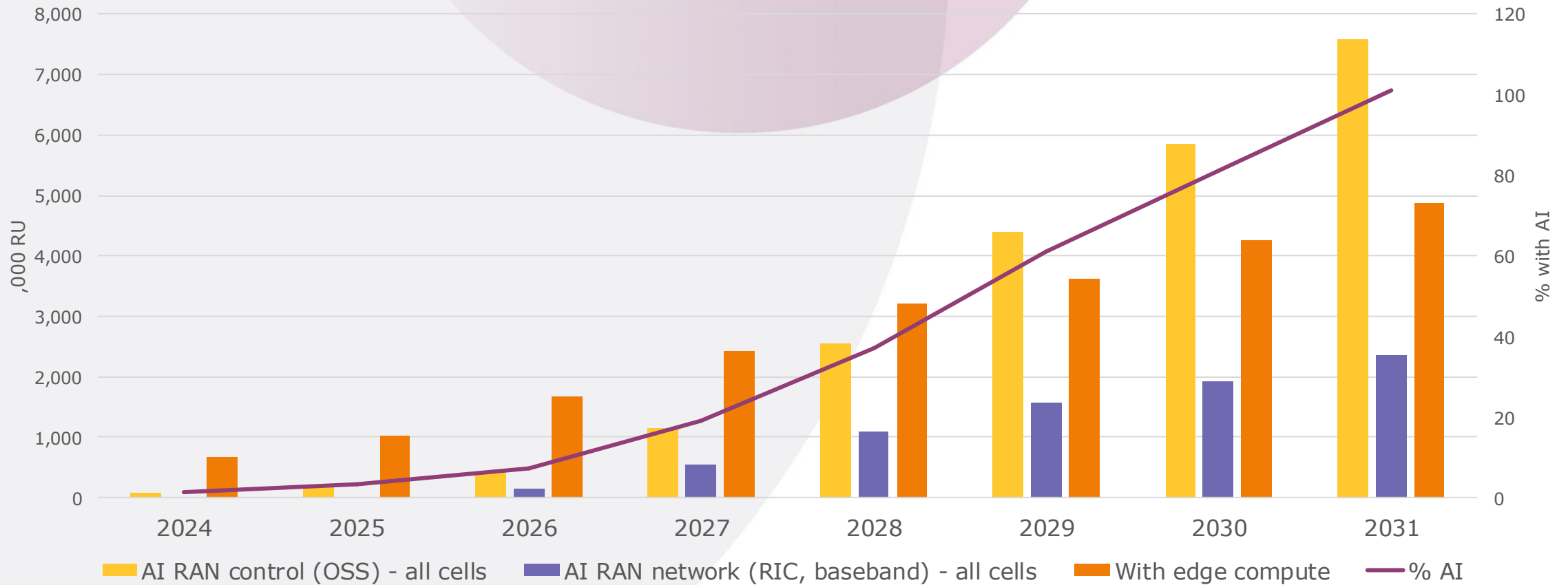


Public outdoor cells by deployer Source: SCF

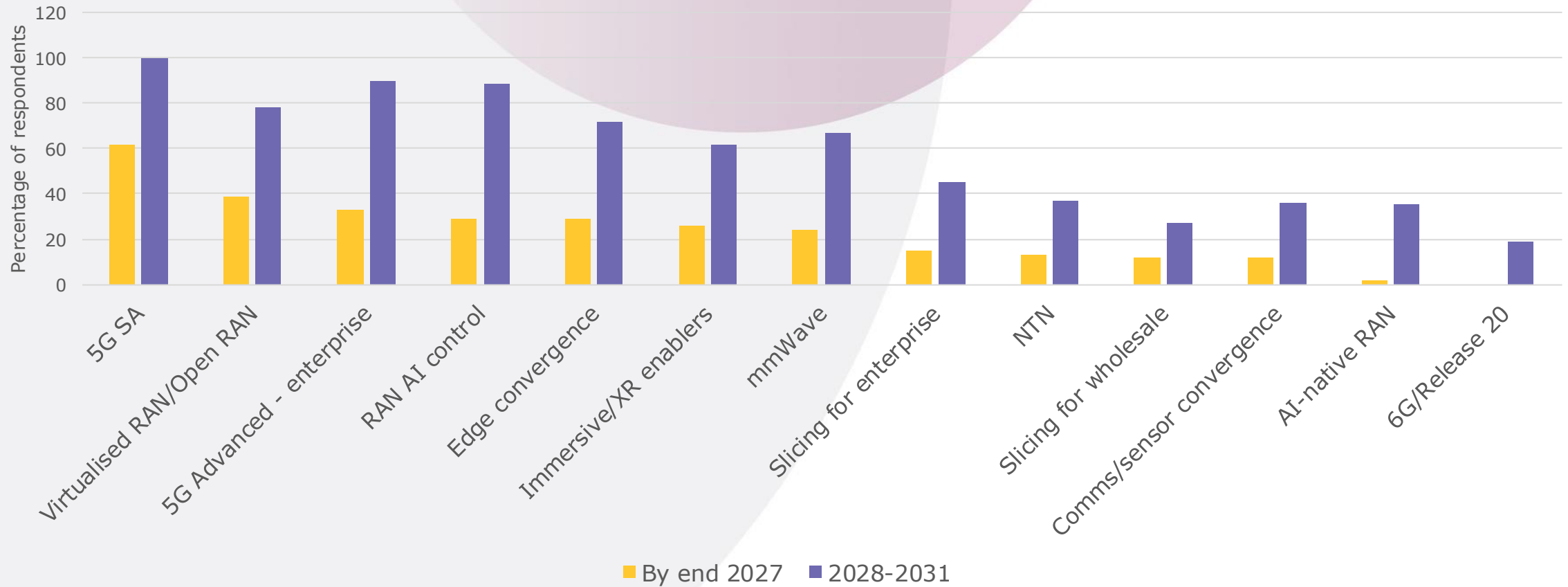


Enterprise cells by deployer Source: SCF

Stakeholders can improve ROI by preparing for trends such as AI and edge – but with caution



What developments will drive monetisation as we move towards 6G?





Thank you!