

Presentation to the Small Cell SIG

# Laying the foundations for 5G deployment in the UK

6 June 2018 • Matt Yardley

# About Analysys Mason

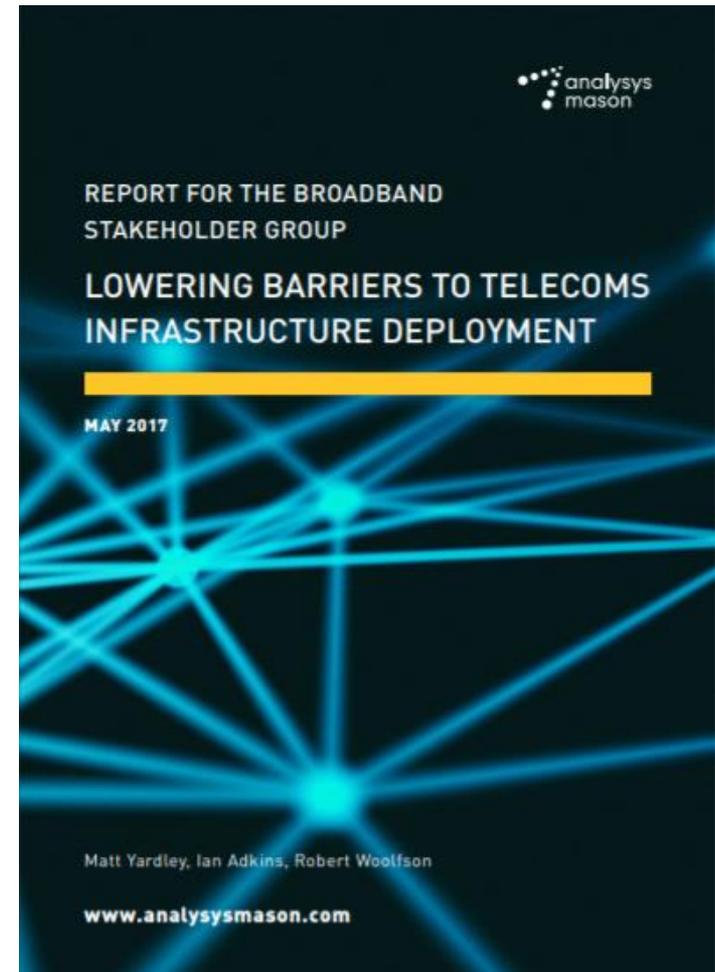
---

- We are a sector-specialist advising in telecoms, media and technology
- Our clients are mostly operators, investors and policy makers
- Established over 30 years ago, 220 people, 14 offices around the world, London HQ
- 200-300 bespoke consulting projects every year

# Published May 2017 – barriers in fixed telecoms

- Focus of this study:
  - Noticing and permit schemes
  - Restriction notices
  - Road traffic management
  - Planning permission

This work led to the creation of the  
“Barrier Busting Task Force”



# The new study is about pre-empting 5G barriers

---

- UK Government ambitions for the UK to be a 5G world-leader
- DCMS-funded trials are underway; and other initiatives include:
  - UK5G, Local Connectivity Group (DCMS/TechUK), Local Full Fibre Networks, Future Telecoms Infrastructure Review
- Mobile operators are preparing for 5G launch
  
- 23 interviews – 11 with local authorities, and 12 with industry stakeholders including MNOs, equipment vendors and infrastructure providers

Publication is imminent ...

# The study scope includes small cells ...



# ... but macro cell issues are still important



# 5G “value uncertainty” – a key over-arching feature we encountered

---

- Local authorities are finding it challenging to develop approaches to promote 5G deployment **without a clear understanding of national priorities or the potential benefits** of 5G for local industries
- Without widespread promotion of relevant use cases and their benefits, there is a **risk of fragmentation in approaches to 5G**, creating additional investment uncertainty for the telecoms industry
- Network providers are **likely to plan more conservative roll-outs** to mitigate the risk of an uncertain business case as well as challenging, and protracted, deployment processes

## This links to the issue of network densification

---

- The study doesn't directly look at likely small cell volumes *per se*
- However, our (Analysys Mason) view is that small cell volumes are likely to be 'modest' rather than 'transformational', at least in the foreseeable future
  - Similar scale to macro cells (tens of thousands), rather than WiFi access points (millions)
- One key driver: macro cell capabilities
  - 5G capacity at least 10x that of 4G

# We found barriers across 3 broad areas

---

**Legislation**

**Deployment**

**Communication**

# We found barriers across 3 broad areas

*Selected examples only – many more in final report*

## Legislation

**Planning regulations**  
(variability by LA/DA,  
lead times esp. for high  
volumes)

**The ECC**  
(adjustment period,  
role of intermediaries)

## Deployment

**Commercial models for  
access to street  
furniture**  
(e.g. inconsistent use of  
concessions)

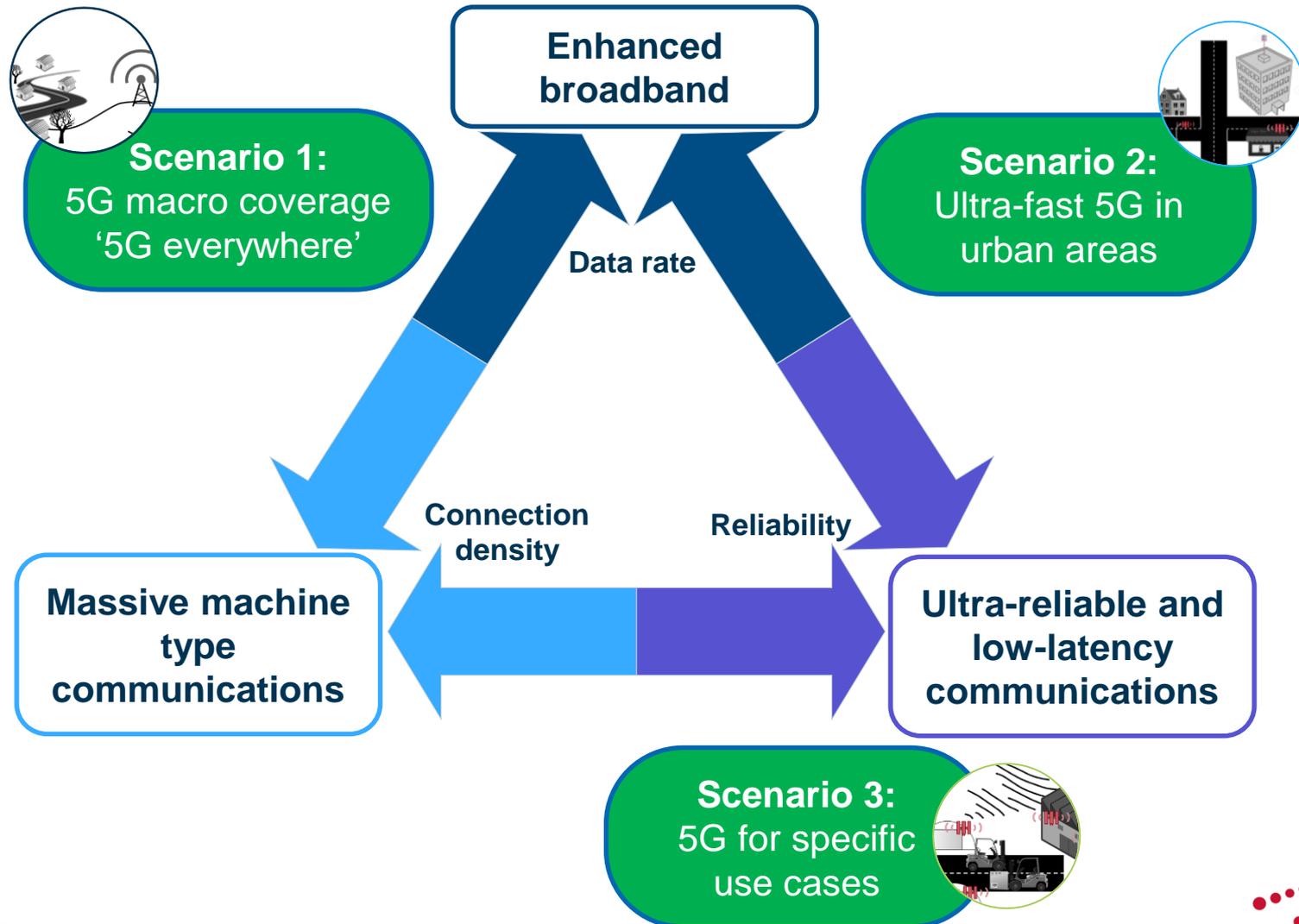
**Access to power**  
(timing & cost issues)

## Communication

**Fragmented approach  
by local government**  
(e.g. short-term revenue  
raising vs longer-term  
infrastructure benefits)

**Inconsistent approach  
by network providers**  
(e.g. information sharing  
about rollout plans)

# Some barriers are scenario-specific



# What to expect from the report

---

- Over 20 recommendations to lower barriers to 5G deployment
- Recommendations targeted to specific stakeholders across central & local government, and industry
- A range of short-term priorities that should be actioned quickly to make a material difference

# Thank you

---

**Matt Yardley**

**Partner**

**[matt.yardley@analysismason.com](mailto:matt.yardley@analysismason.com)**

**07766 058 242**