



Department for  
Digital, Culture,  
Media & Sport

# An Overview of UK 5G Policy

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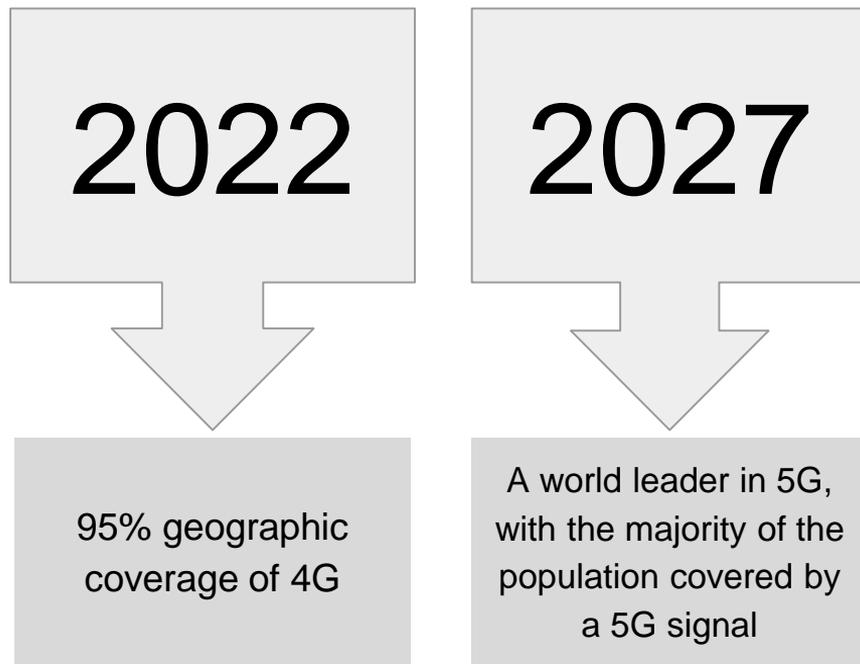
# The Future Telecoms Infrastructure Review

The Future Telecoms Infrastructure Review (FTIR) was announced in the UK Government's **Industrial Strategy**, with the aim of:

- ❖ Exploring the incentives for investment in new digital infrastructure for both fixed and mobile, and
- ❖ Establishing a clear evidence base to determine whether any additional policy interventions may be needed to secure investment

The process involved consultations with industry, consumer groups, and investors; an in-depth analysis of the UK market; as well as drawing on the experiences of our international peers.

# Our Mobile Connectivity Ambitions



# Assessing Alternative Market Models

1

## Current Model

- ❖ Multiple vertically integrated national operators
- ❖ Infrastructure sharing through commercial agreements supplemented with the use of independent infrastructure providers
- ❖ Spectrum authorisation on the basis of long-term national licences

2

## Single National Wholesale Network

- ❖ Monopoly infrastructure provider offering a wholesale service to MNOs and other wireless operators
- ❖ Spectrum pooled and allocated to the monopoly provider

3

## Market Expansion Model

- ❖ Multiple vertically integrated national operators supplemented by 'neutral host' infrastructure and private networks
- ❖ Spectrum access through spectrum trading or new spectrum sharing models

# Optimal Market Model for 5G

## Market Expansion Model

A model that **maintains the benefits of network competition** between multiple mobile network operators, while **enabling solutions to specific challenges** - including indoor coverage, rural coverage and enterprise applications - in order to support market expansion.

# Key Recommendations

## 5G

To help to grow a competitive mobile market and support investment and innovation, the Report recommends:

1

Making it **easier** and **cheaper** to  
deploy mobile infrastructure

2

Supporting infrastructure models that  
**promote competition & investment  
in network densification &  
extension**

3

Stimulating demand and new use  
cases through the **5G Testbeds and  
Trials Programme**

4

Securing a diverse set of innovative  
5G services through flexible future  
**spectrum policy**

# Key Recommendations

## 5G

To help to grow a competitive mobile market and support investment and innovation, the Report recommends:

1

Making it **easier** and **cheaper** to  
deploy mobile infrastructure

- ❖ Ensuring the Electronic Communications Code reforms achieve their intended effect
- ❖ Considering further planning reforms
- ❖ Improving access to public sites
- ❖ Access to power supplies
- ❖ Local solutions to address deployment barriers

# Key Recommendations

## 5G

To help to grow a competitive mobile market and support investment and innovation, the Report recommends:

2

Supporting infrastructure models that **promote competition & investment in network densification & extension**

- ❖ 'Neutral host' or wholesale-only models could unlock new investment and boost network coverage in a variety of areas
- ❖ Government will support industry initiatives to build on current MNO commercial agreements for the sharing of infrastructure
- ❖ DCMS' 5G Testbeds and Trials Programme will aim to trial a range of infrastructure models
- ❖ Concession model access agreements should give greater priority to proposed investment plans and quality of mobile infrastructure provision of the bidders

# Key Recommendations

## 5G

To help to grow a competitive mobile market and support investment and innovation, the Report recommends:

3

Stimulating demand and new use cases through the **5G Testbeds and Trials Programme**

- ❖ Government has a major role to play through stimulating growth of new use cases and so de-risking deployment where there is demand uncertainty
- ❖ 5G Testbeds and Trials Programme is funding a series of projects to explore different connectivity solutions and business models
- ❖ We have announced an initial phase of projects launched our urban connected communities project

# Key Recommendations

## 5G

To help to grow a competitive mobile market and support investment and innovation, the Report recommends:

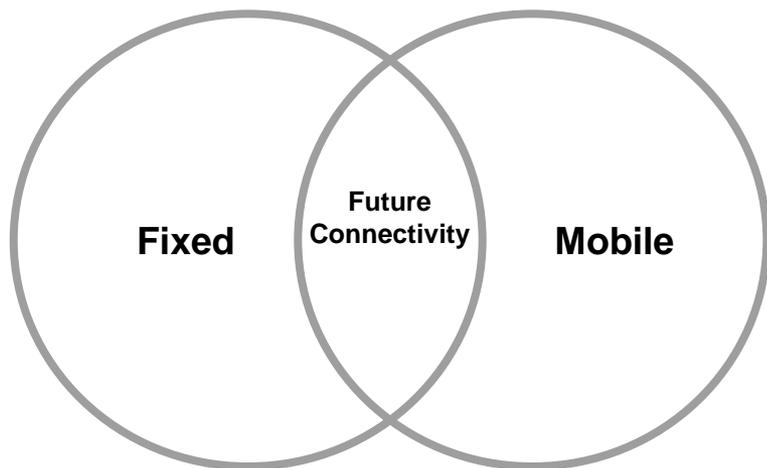
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Securing a diverse set of innovative 5G services through flexible future **spectrum policy**

- ❖ Spectrum sharing models could enable new players to access spectrum and invest in new business models, alongside existing operators
- ❖ Government encourages Ofcom to assess the feasibility, costs and benefits of potential flexible licensing models, as well as the trade-offs involved as part of the planned release of the 3.6-3.8 GHz band
- ❖ Government will ask Ofcom to report on the utilisation of spectrum in the mobile bands
- ❖ Government would like Ofcom to clarify that leasing of mobile spectrum is not prohibited

# Key Recommendations

## Convergence



- ❖ There is an increasing overlap between fixed and mobile networks and services. The policy and regulatory framework should be sufficiently flexible and forward-looking to reflect this.
- ❖ Local authorities, operators, and other key stakeholders should consider the likely locations for 5G cell sites, for the purpose of ensuring that fibre networks can be future-proofed.
- ❖ Existing Government Programmes will be used to promote investments that recognise convergence, and use the new Local Connectivity Group to share information from these programmes more widely.



# Next Steps

- ❖ Use the Review's findings to form the basis of the Government's Statement of Strategic Priorities to Ofcom, so that Ofcom can build this into their regulatory framework and decision making
- ❖ Implement, where appropriate, the provisions of the European Electronic Communications Code into UK law
- ❖ Monitor the progress of document and take actions where necessary