

The secrets of making 5G a success

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Who we are

20+

years of ICT experience



30+

satisfied customers (MNOs, vendors, regulators, EC)



100+

journal publications

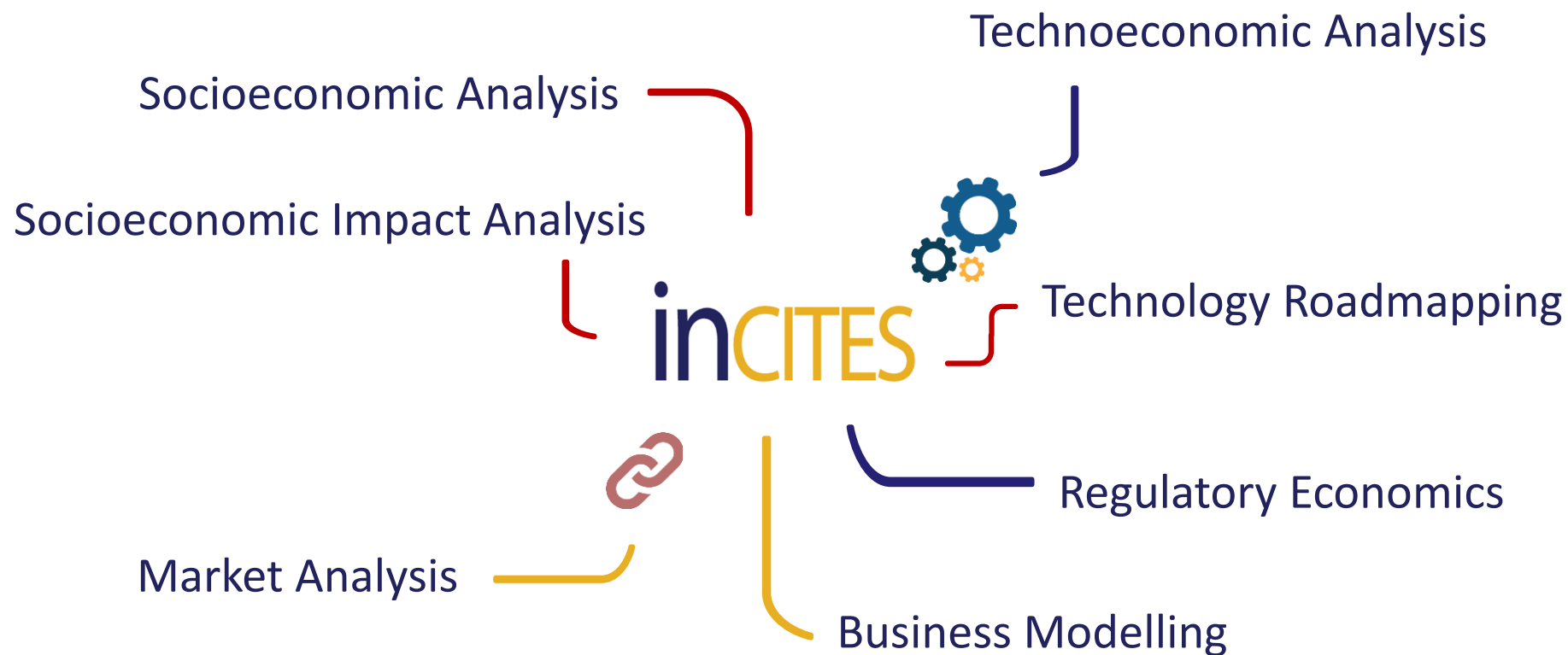


300+

users of our awarded TEN web app



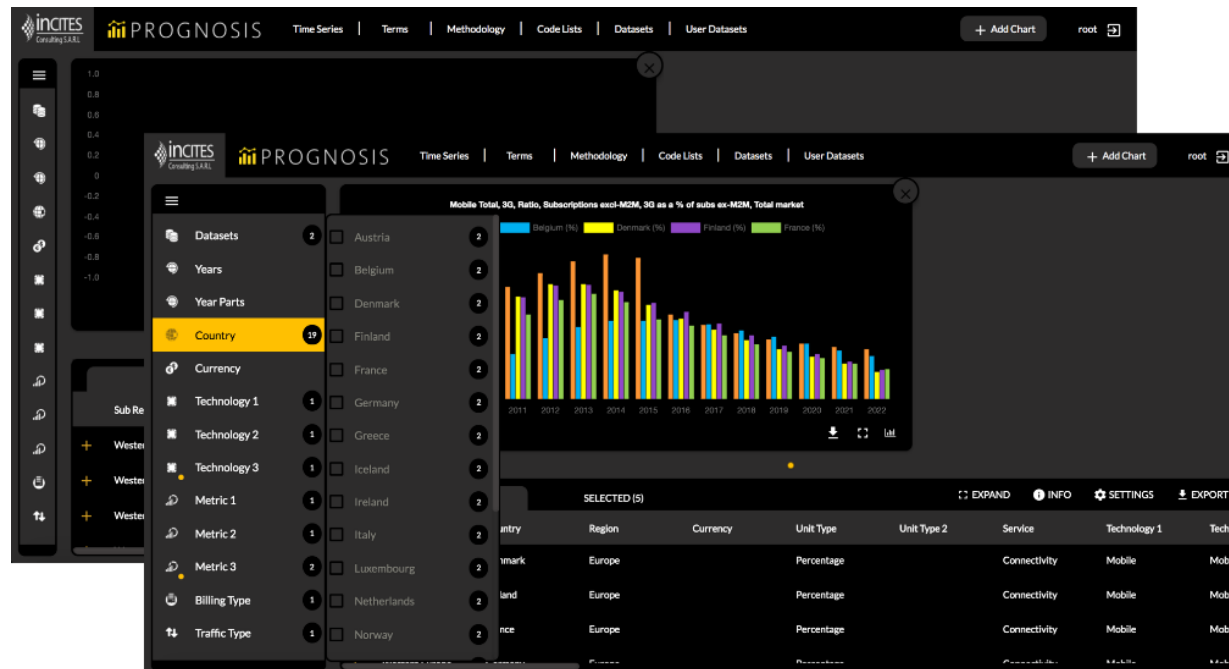
Consulting



Research



Data - Prognosis



41 European countries



100+ KPIs



50k+ data points

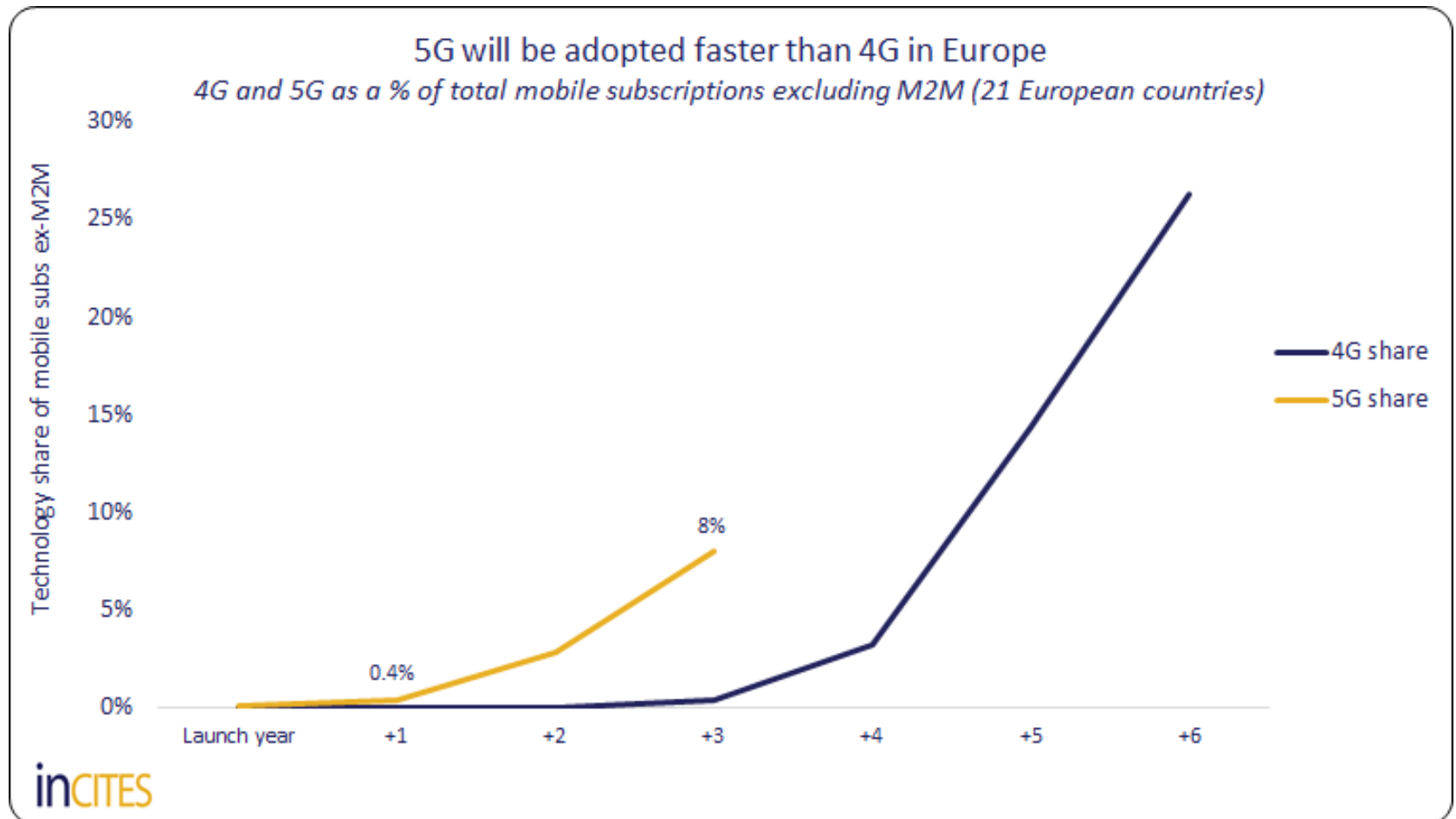


21 years of coverage

5G: marketing trick or opportunity?

Madrid Hamburg Munich Milan
Zurich Barcelona Bilbao London
Rome Trikala Kongsberg Bristol Prato
Vantaa San Marino Helsinki Turin
Oulu Tallinn Copenhagen Budapest
Douai Belfort Jastrebarsko L'Aquila Turku
Lisbon Linas-Montlhéry Matera
Glasgow Ziepniekkalna Tampere
Groningen Tornakalna Vilnius Lille
Espoo Innsbruck Stockholm Patras Kista
Paris Brussels Bucharest Dublin
Talsi Venice Amsterdam Berlin

inCITES 5G forecast

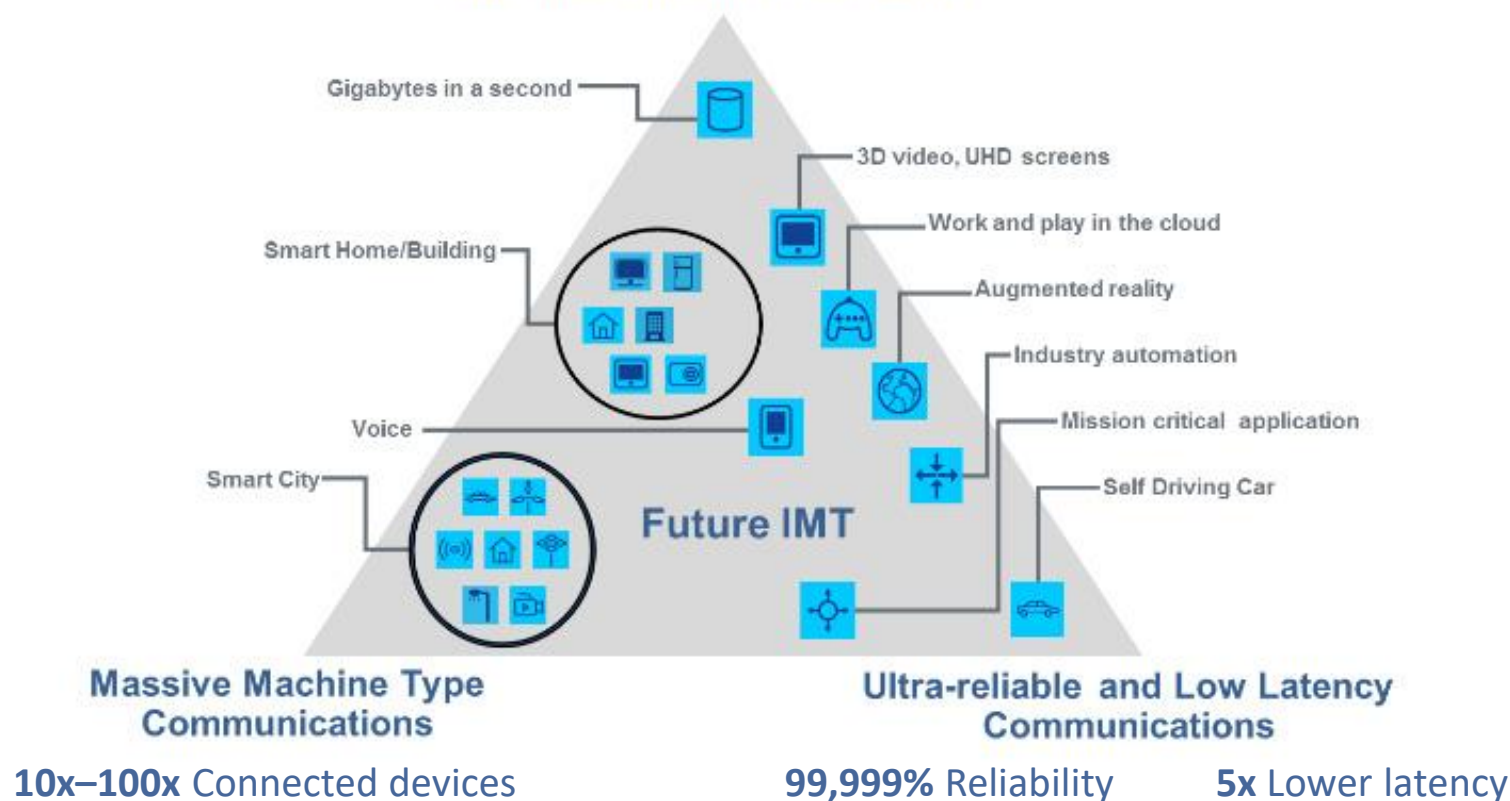


The 5G promise

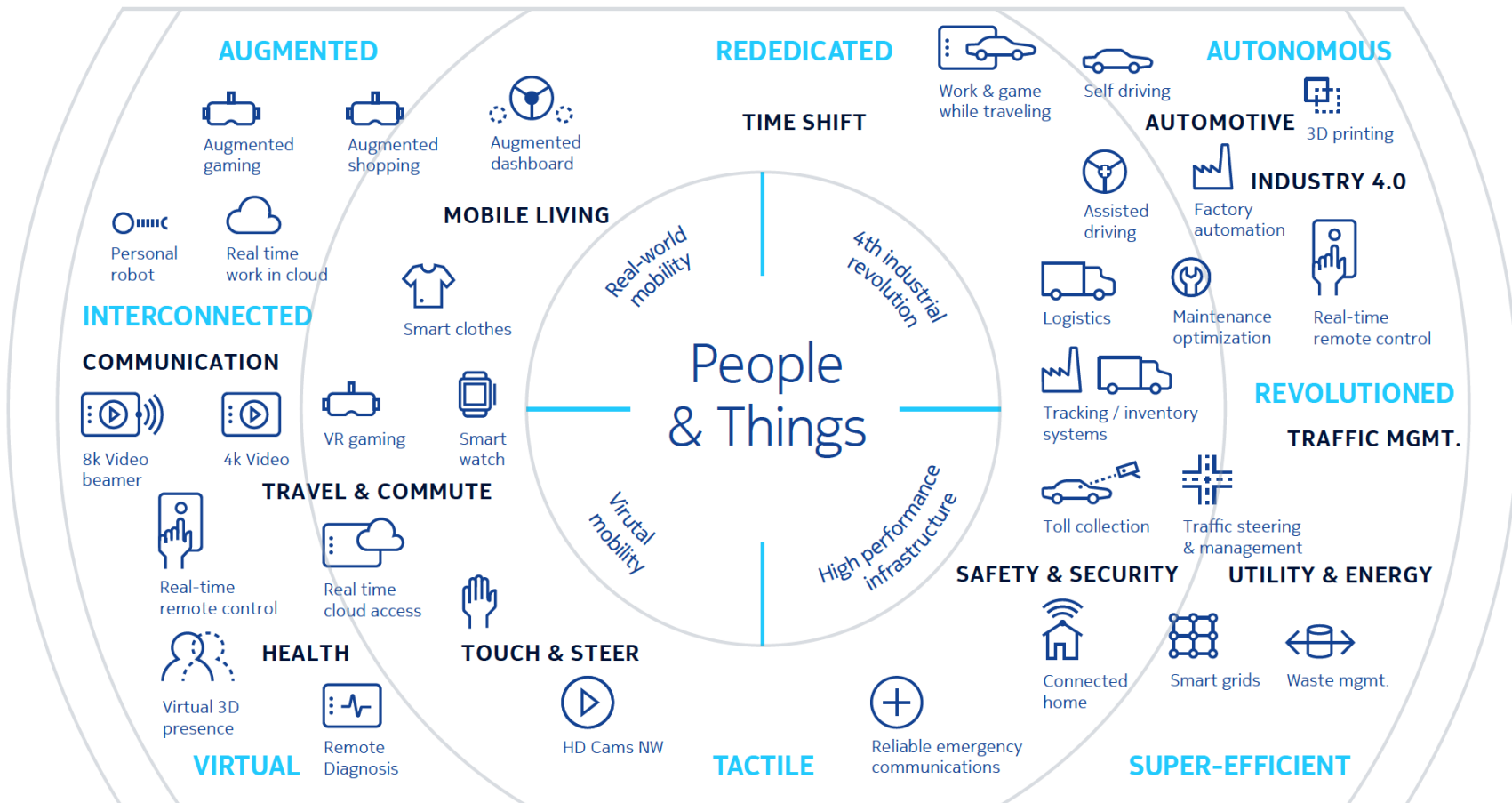
10x–100x Data rates

Source: ITU-R IMT-2020

Enhanced Mobile Broadband

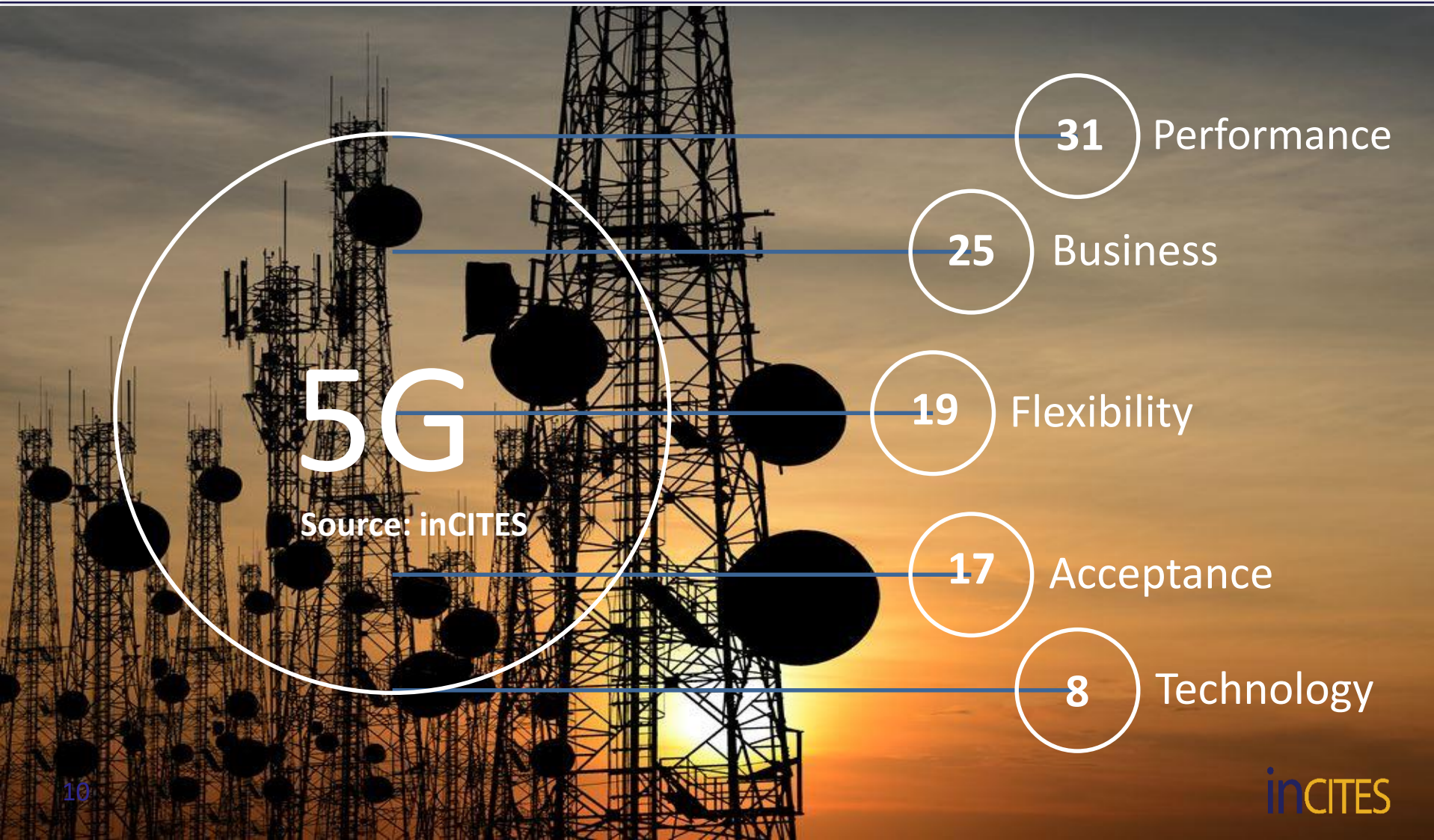


Is it merely a range of new use cases...

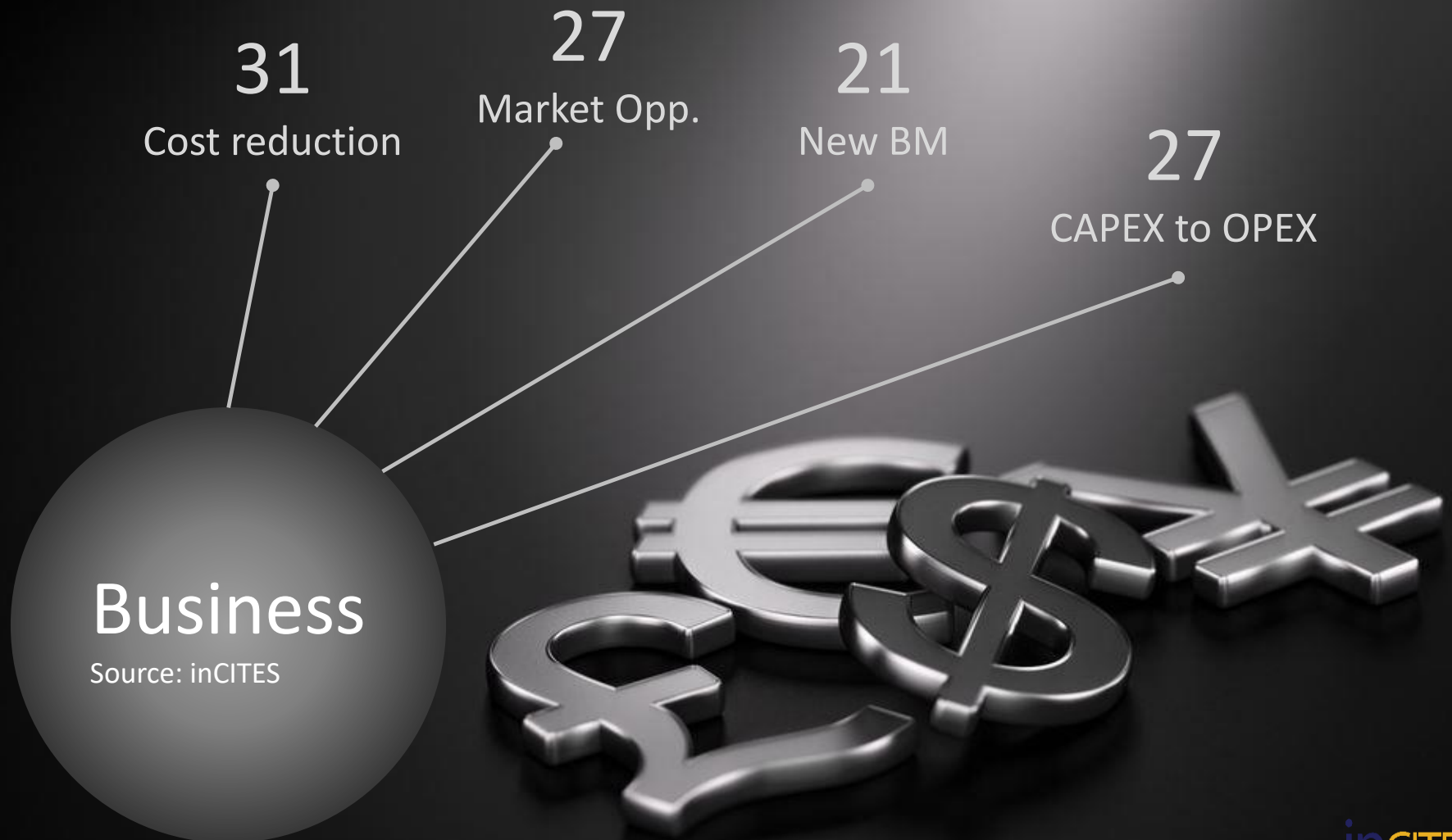


Source: Nokia

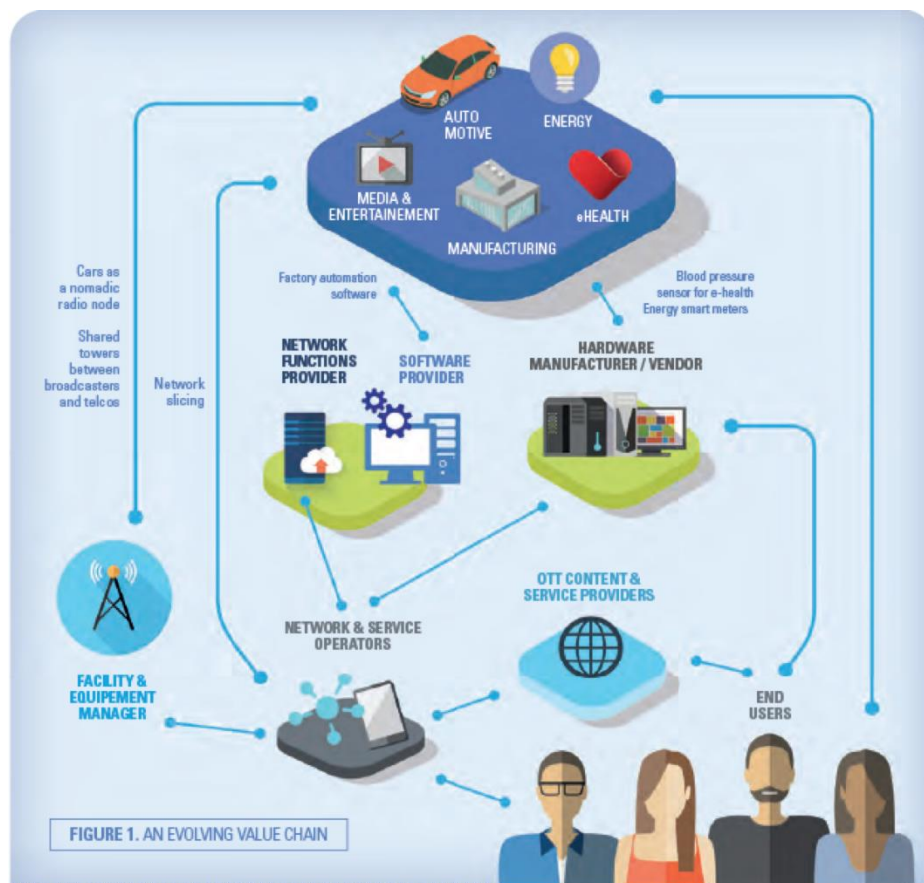
...or something more?



5G Business value breakdown



The power of 5G!



Source: 5GPPP

New network management possibilities

A single physical network can support multiple virtual networks

Service differentiation

New roles in the value chain

Network sharing, co-investments

Structural separation – Neutral Host model*

The list of secrets...

Focus on niches that the required capabilities are not readily or cost effectively met by alternatives.

Facility Manager

- Rent space
- Rent facilities (lampposts, street cabinets, stadiums etc.)

Infrastructure Owner

- Datacenters
- Cloud
- ...

Neutral Host Operator

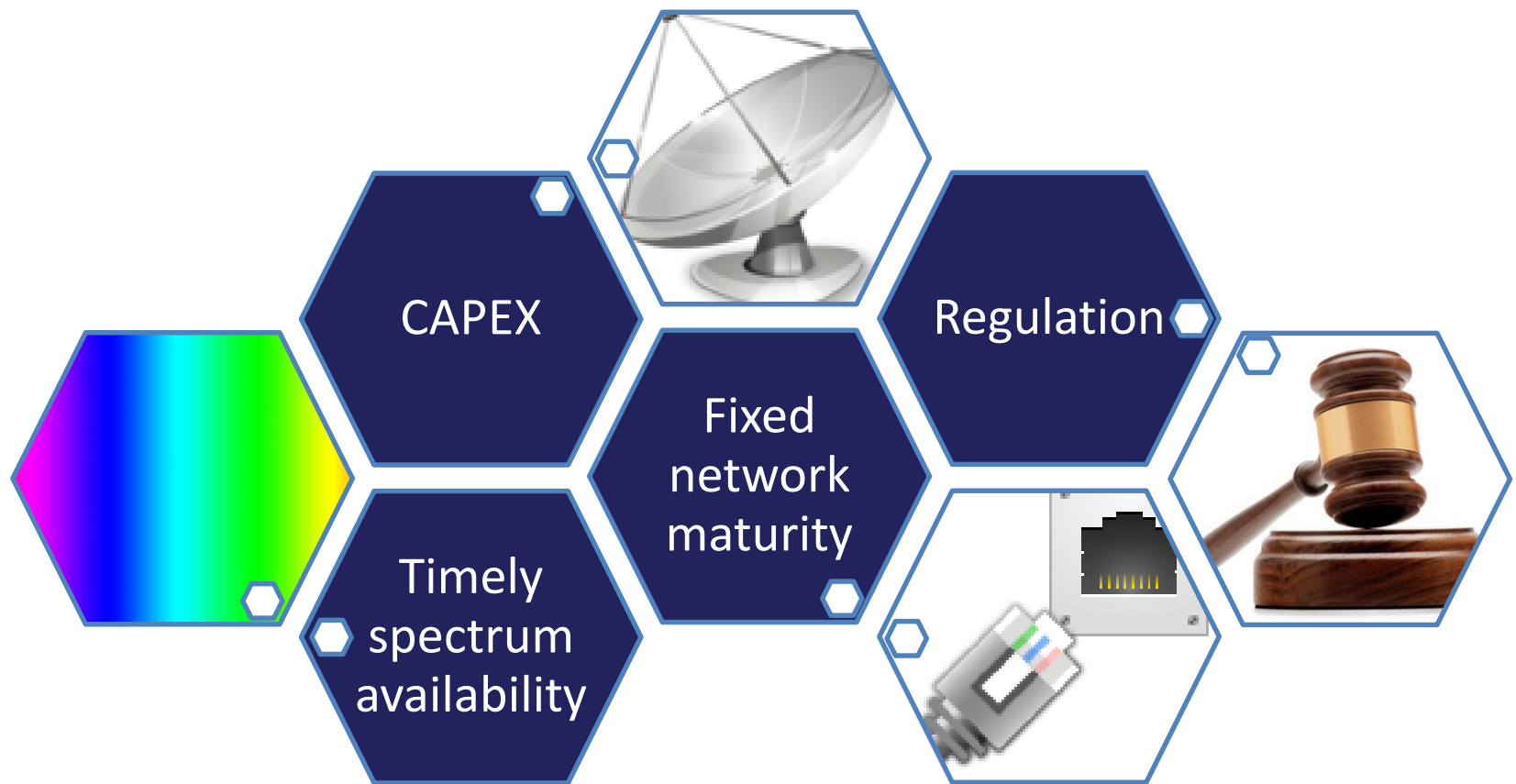
- Provide wholesale access
- Smart pipe
- Optimize performance
- Partnerships

Service / Content Provider

- Differentiation
- Tailor-made personalized services
- Meet clients requirements

No killer application – No massive deployments are expected – 5G islets

Challenges



Key Takeaways



5G will provide improved performance and a plethora of capabilities



You have to have a clear value proposition in mind before investing



We are gradually moving towards a structural separation with new players in the value chain and a focus on niches

Thank you!



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