



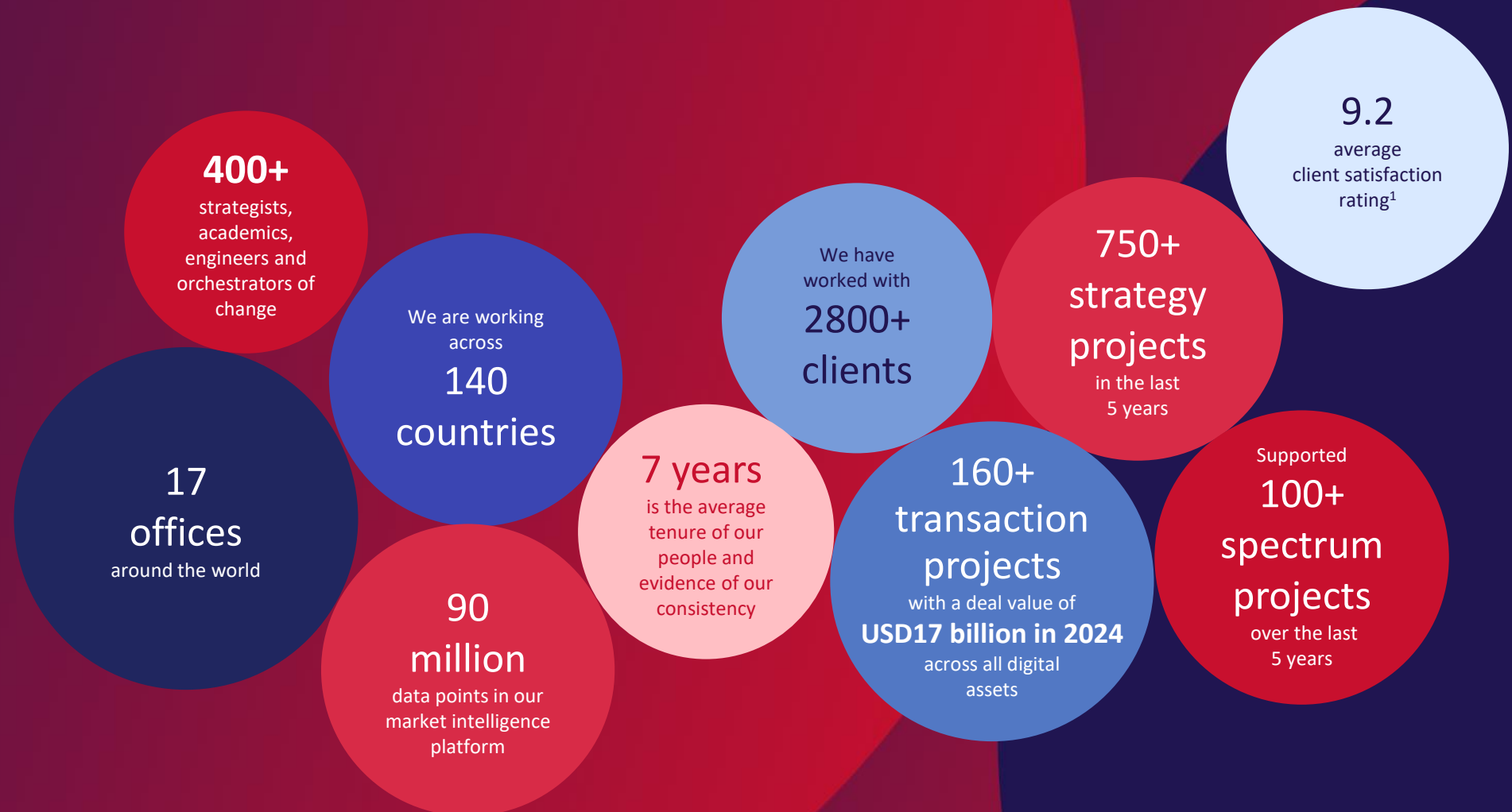
Prepared for UK Spectrum Policy Forum Workshop:
Spectrum for Critical National Infrastructure and Transport

Delivery challenges for private networks

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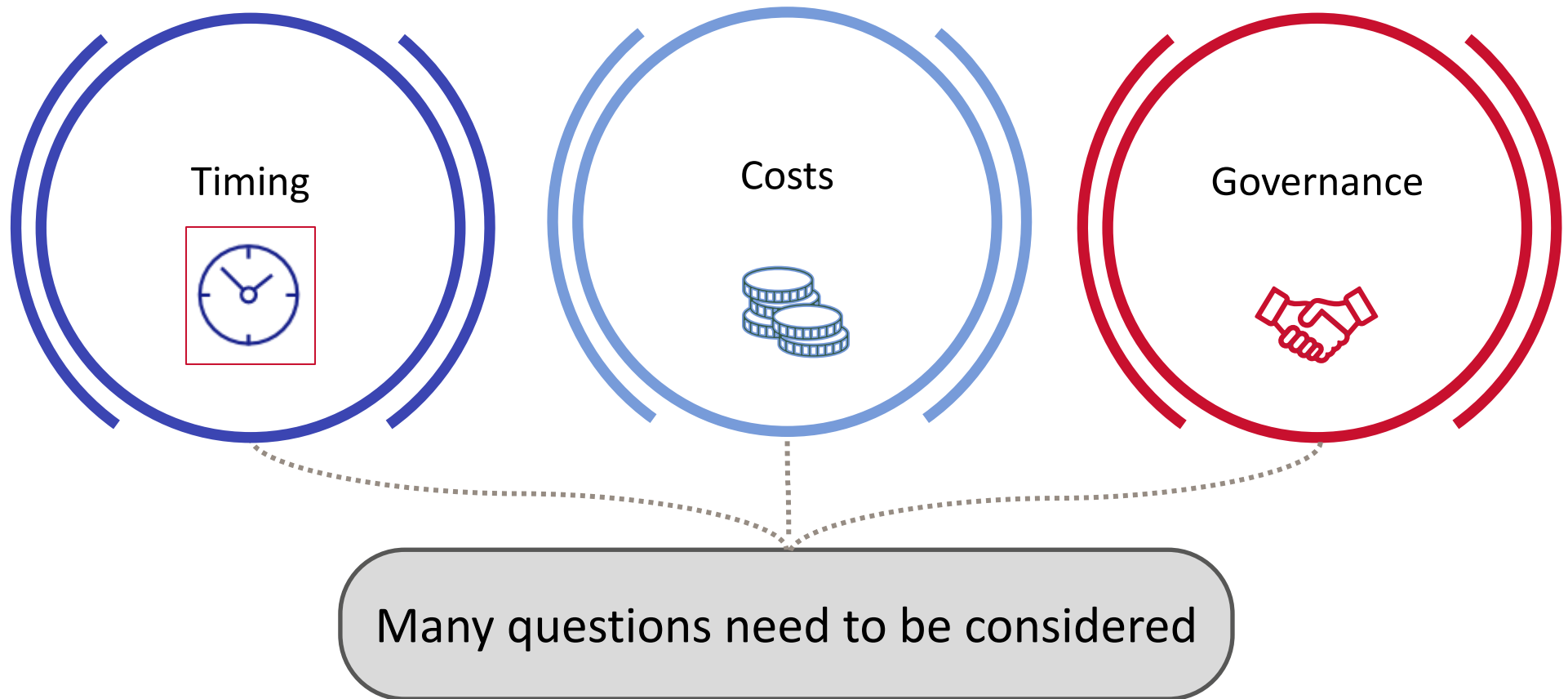
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A snapshot of Analysys Mason



¹ Analysys Mason client satisfaction survey 2020–2024 (the maximum score is 10)

Delivery challenges can be summarised by three key themes



Assuming spectrum is set aside for development of a private network with capabilities meeting CNI* requirements, key delivery decisions need to be made

Timing

- Do sectors have different requirements over different timescales?
 - Company differences due to existing arrangements, different geographies, etc?
- How will the spectrum be assigned (nationally, or regionally?) and how long will it take to vacate existing users?
- What is the lifetime to apply for a future network (in a business case context)?
 - Industry / regulatory norms, digital technology upgrades?

Costs

- Who owns the business case?
 - Government, industry?
- Who finances a solution?
 - Public, private, PPP?
- Who pays for running of the network once it is operational?
 - Taxpayers, customers?
- How are the Total Cost of Ownership (TCO) costs allocated (or charged)?
 - Company usage, customer numbers, cost proportion?

Governance

- Are existing mechanisms applicable?
 - Regulatory price controls, HMT Green Book?
 - Will regulatory changes be necessary (e.g. energy price controls)?
- Who will lead / control delivery?
 - Government-led, licensed commercial body, industry-led?
- If industry-led, but requiring government support, do subsidy control rules apply?

Modelling TCO scenarios is a critical next step for business case development

Thank you!

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