



Presentation to the Spectrum Policy Forum

Use case requirements in the 3.8–4.2GHz band



Chris Nickerson and Janette Stewart

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Introduction

How the 3.8–4.2GHz band is currently used in the UK

Evolution of use cases

Recommendations on SAL framework

This presentation provides a summary of findings from our study into the use cases in the 3.8–4.2GHz band, available via the shared access licensing (SAL) framework

Background to the study

- The purpose of the study was to investigate current and future use cases in the 3.8–4.2GHz band, available via the shared access licensing (SAL) framework in the UK
- Key questions for the study were to consider how use cases might evolve, and how future developments in use cases, and demand for licences, could impact evolution of the SAL framework conditions
- The study has been based on a combination of desk research, plus one-to-one interviews with selected stakeholders (including current users of SALs, equipment vendors and other stakeholders)

Status of the study

- A final report has been prepared and reviewed by the SPF steering board
- The purpose of this presentation is to describe how we approached the study, and our key findings

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Introduction

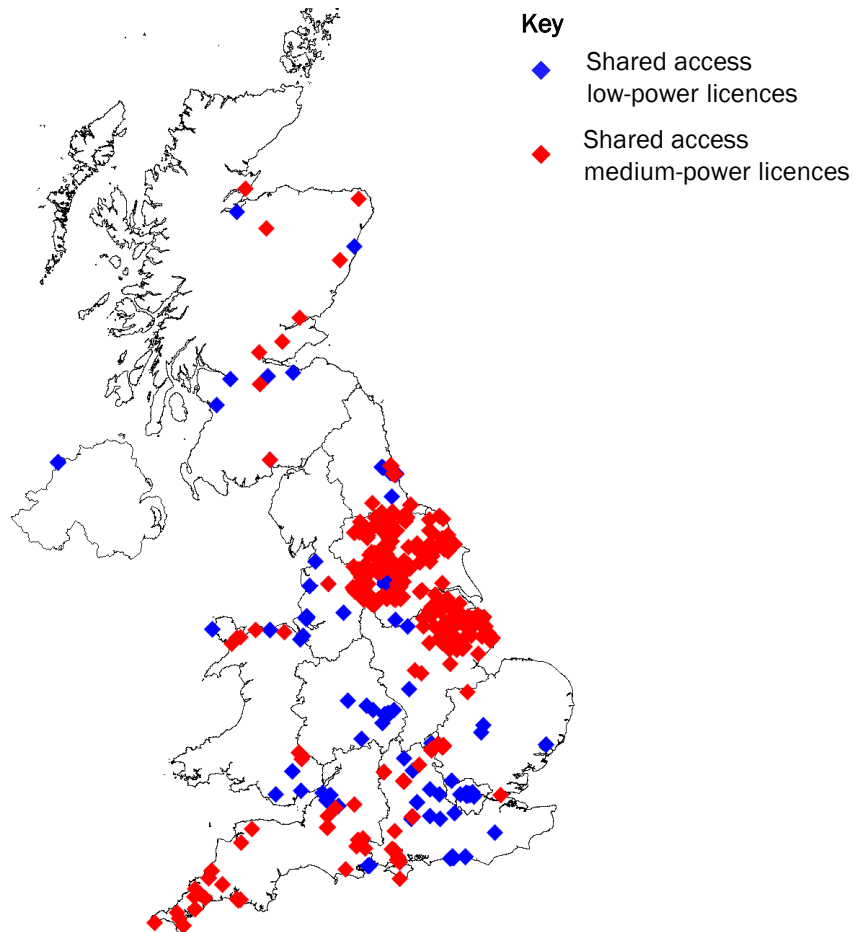
How the 3.8–4.2GHz band is currently used in the UK

Evolution of use cases

Recommendations on SAL framework

According to Ofcom's WTR in July 2023, there were 674 live SALs across the UK¹

Map of existing SALs in the 3.8–4.2GHz band



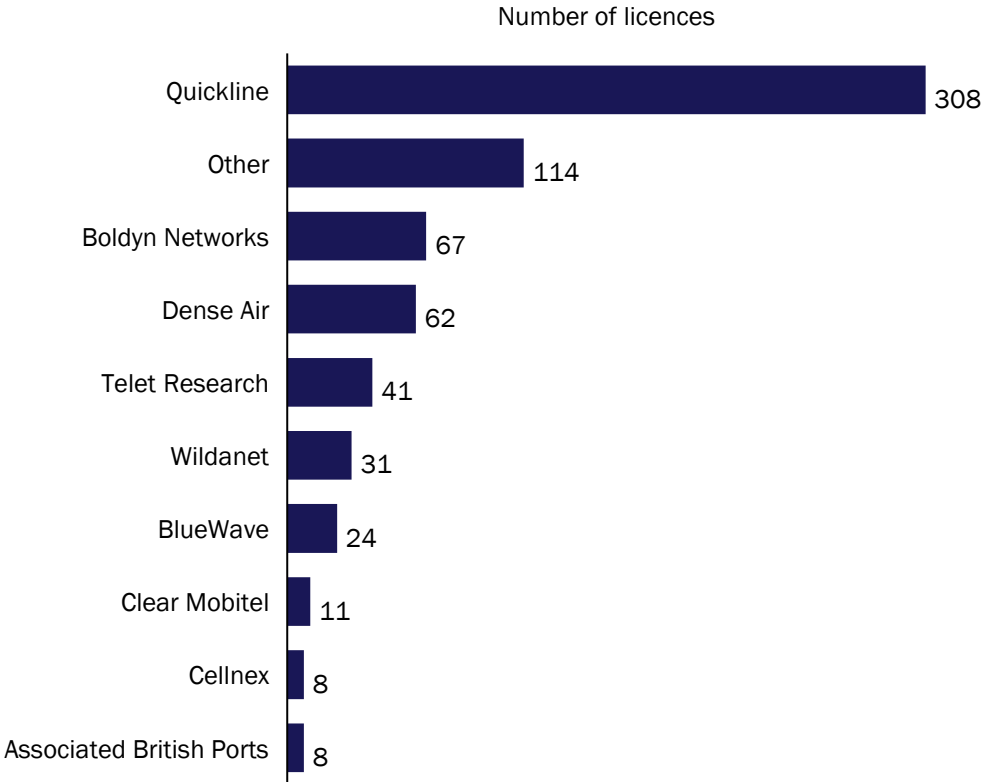
- Of these 674 SALs in the 3.8–4.2GHz band, over half are used for rural broadband services
 - Quickline, a broadband service provider for Yorkshire and Lincolnshire, held the majority of SALs at the time when we accessed the WTR (308 licences in total in July 2023)
- Other uses of the band are seen in ports and manufacturing industries, as well as live broadcasting events
 - stakeholders suggested during the interviews that many current deployments are still at trial/proof-of-concept stage
 - indications that the ecosystem is now progressing in this band should also encourage further adoption
 - we note that the Department for Science, Innovation and Technology (DSIT) has published a 5G innovation funding opportunity (September 2023 deadline), which could increase the number of applications for SALs in the 3.8–4.2GHz band to support new funded projects

¹ The analysis is based on the WTR extracted in July 2023, and the latest WTR (extracted in September) suggests that the number of total SALs in the 3.8–4.2GHz has now reduced to 602 (with a reduction in licences granted for FWA purposes)

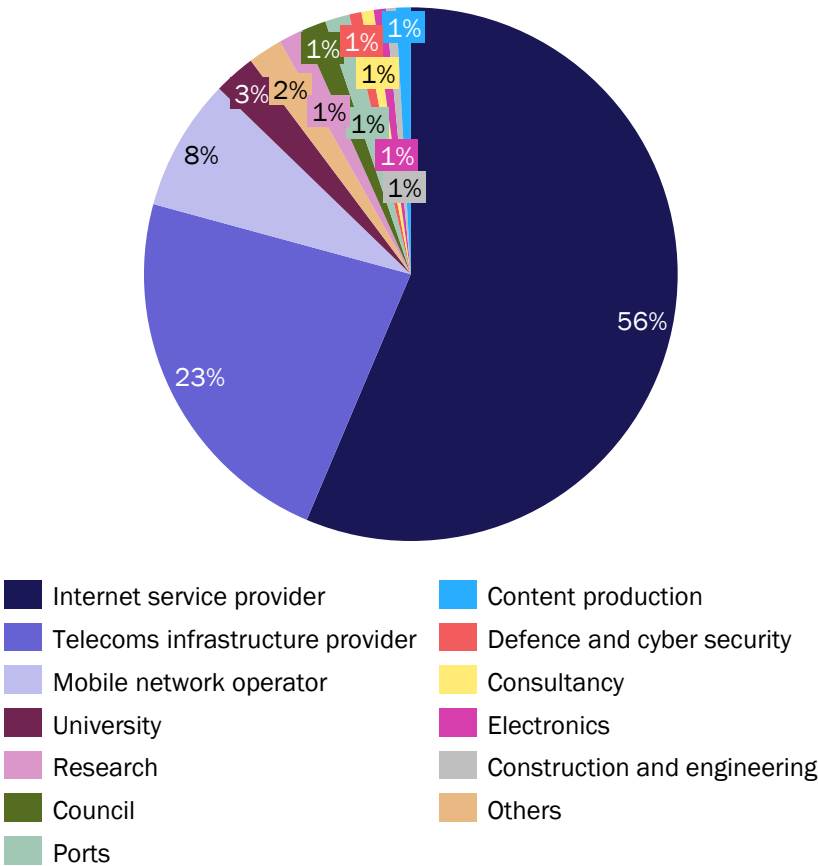
Source: Analysys Mason based on Ofcom's WTR (July 2023)

Out of 674 SALs using the 3.8–4.2GHz band in July 2023, over half of licences were for rural broadband services, with the remainder spread across multiple users

3.8–4.2GHz SALs distribution by company

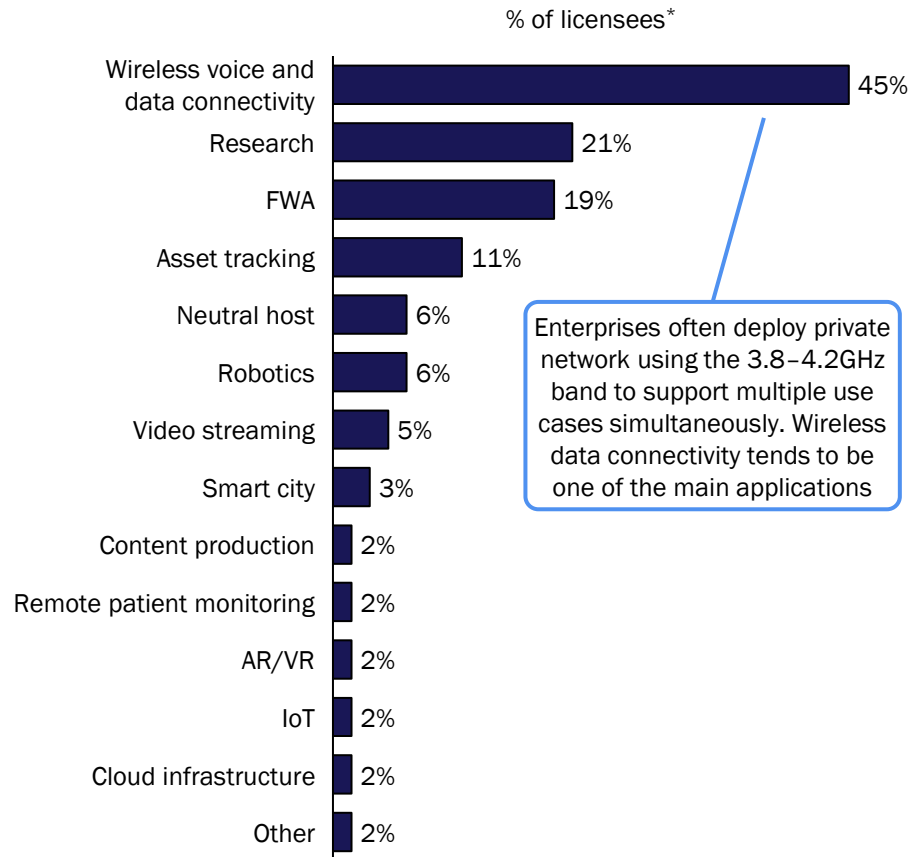


Licence holders, by number of existing 3.8–4.2GHz SALs



Many SALs are being used to provide locally customised wireless data connectivity solutions, with specific use cases including FWA, IoT, tracking, robotics and AR/VR

Use cases of 3.8–4.2GHz SAL



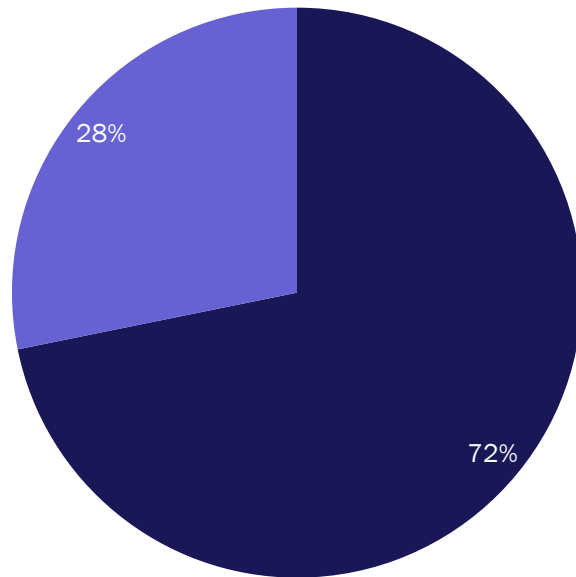
Examples of use cases

Use case	Examples
Wireless data connectivity	Ferrovial, a construction and engineering firm, has deployed private 5G network at its Silvertown Tunnel construction site to enable wireless connectivity in the tunnel and enhance site communications, access management and perimeter control
Content production / broadcast and wireless production	- BBC R&D, Neutral Wireless Ltd, and StrathSDR deployed networks in 3.8 to 4.2GHz to allow cameras to be connected to 5G standalone (SA) networks. Networks were optimised for uplink capacity with the downlink used for control and talkback - International broadcasters connected to an eight-cell network outside Buckingham Palace down to Trafalgar square in May 2023, to carry live video to global networks from the King's Coronation
FWA	Quickline has announced that it has developed and commercialised a 5G standalone, cloud-native OpenRAN network that utilises the specified spectrum band for FWA services in selected locations
Asset tracking	Associated British Ports have deployed private 5G network at the Port of Southampton to provide the port with a reliable and secure private wireless data network
Neutral host	Dense Air has launched a 5G standalone neutral host network in Millbrook, that allows connected and autonomous vehicle testing
Robotics	BT has deployed a purpose-built private 5G network at the Manufacturing Technology Centre's manufacturing research facility in Coventry, in partnership with West Midlands 5G (WM5G) and Worcestershire 5G (W5G) programme

* In total, there are 62 unique licence holders as of July .

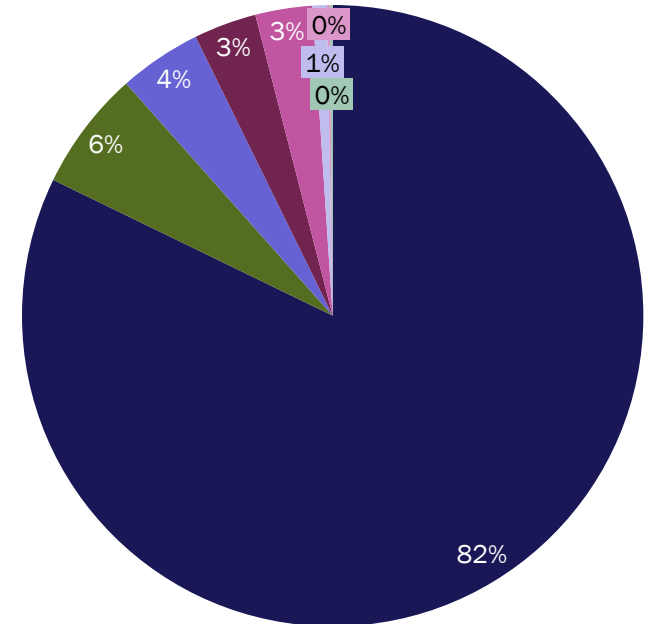
According to Ofcom's WTR, most of the 674 licences issued for the 3.8–4.2GHz band in July 2023 were using medium power, and were using 100MHz bandwidth

Power limit of 3.8–4.2GHz SALs issued



Shared Access Low Power
Shared Access Medium Power

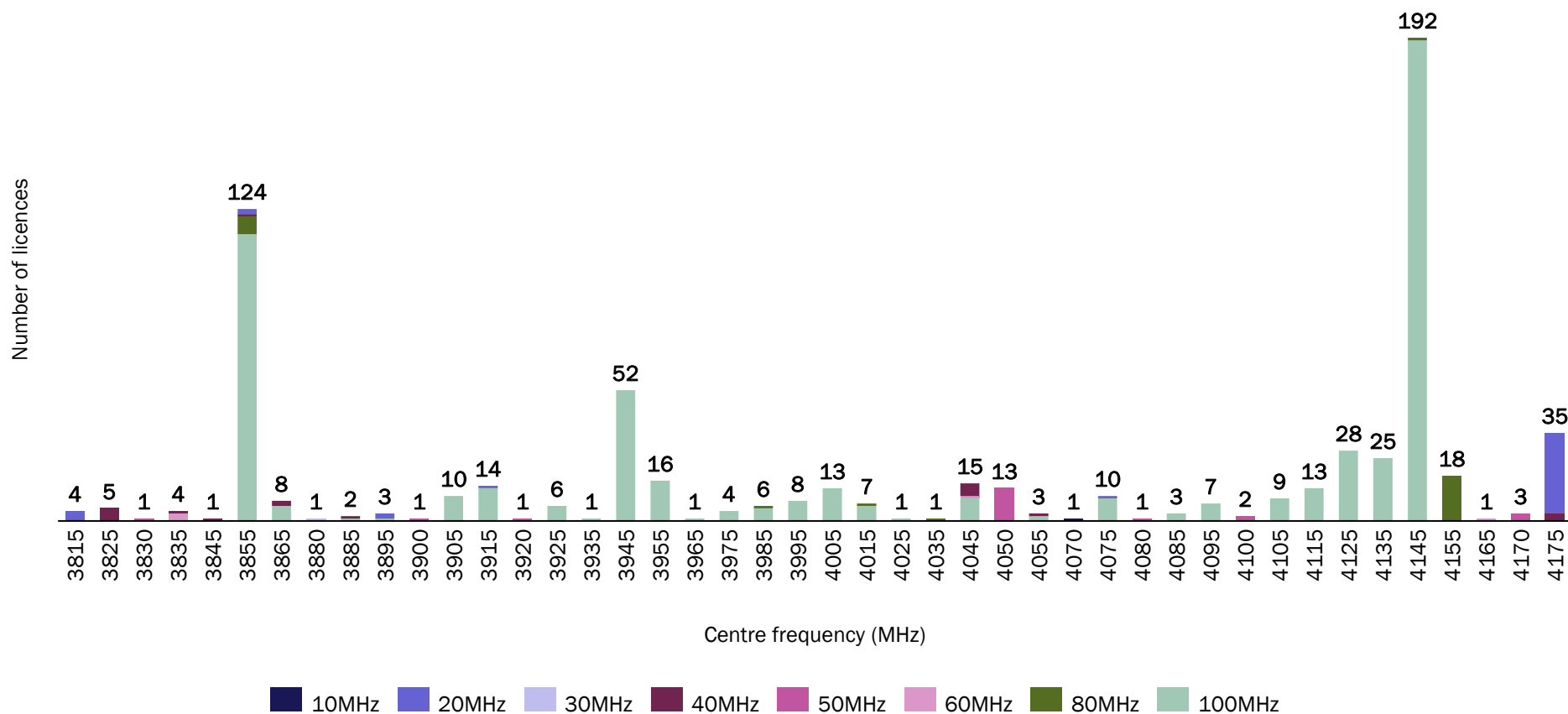
Bandwidth of 3.8–4.2GHz SALs issued



100MHz 80MHz 60MHz 50MHz 40MHz 30MHz 20MHz 10MHz

Our analysis suggested most 100MHz bandwidth licences were assigned by Ofcom in the lower or upper part of the band, but with a broad spread across the band

Number of SALs in the 3.8–4.2GHz band per bandwidth per centre frequency



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We found SALs are currently being used for 5G-FWA, private 5G networks and content production, and that the specific use cases will expand and evolve

Summary of evolution of use cases

	Use cases	Technologies to deliver the use cases	Outdoor/indoor deployments	Bandwidth
Current deployments	- Sensors on cranes at ports and other data, video and IoT applications - Live video content for television broadcasting - Fixed-wireless access (FWA) networks for broadband connectivity in rural areas	5G new radio (5G-NR) in standalone (SA) configuration	Indoor and outdoor	10–100MHz
Potential future evolution	- Augmented/virtual-reality (AR/VR) applications, robotics and autonomy in several industrial sectors - Video upload from live events - Tailored private wireless networks in specific environments (such as hospitals and manufacturing) - One potential new use case is wireless microphones/audio systems	- Most evolving use cases appear likely to continue to use 3GPP n77 products - There is interest from potential providers of DECT-NR+ products in using the 3.8–4.2GHz band for wireless microphone use or for IoT via DECT-NR+	- Growing demand for localised outdoor deployments may be expected (such as FWA uses, ports, airports, factory sites with multiple buildings) - Seamless connectivity for a combination of indoor and outdoor environment in a given location (such as automated guided vehicles in warehouses)	- Larger channel widths (80MHz or 100MHz, or above) may still be dominant options for greatest capacity to accommodate a widening range of use cases - Potential demand for larger bandwidths (such as 200MHz) as use cases evolve, such as for AR/VR use

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It could be beneficial to account for antenna characteristics in the co-ordination process, and consider how locations for medium power base stations are defined

Summary of recommendations on technical conditions for SAL framework

Medium power licence authorisations	- Our research suggests that there is interest in allowing applications for medium-power licences in non-rural postcode areas, and hence it could be desirable to consider if this demand can be accommodated in the co-ordination process without impacting availability of locations for low-power licences - Given the medium-power licence authorises base stations individually, there could be merit in considering if more than one medium-power base station can be permitted in a single authorisation in one location (for example, to optimise coverage across a larger industrial area, if connectivity is needed between buildings) - Costs/benefits of allowing power levels higher than the current medium-power limit, for selected use cases and in very rural locations (such as FWA), could be considered
Co-ordination process for different forms of antenna deployment	- Ofcom currently specifies maximum base station power as EIRP per sector whereas there could be support from some equipment suppliers to consider how to modify the co-ordination criteria for base stations to use active antenna systems (AAS) - The current co-ordination process uses EIRP for co-ordination, but it could be beneficial to consider using specific antenna characteristics in the co-ordination process – for example, applicants might be able to demonstrate co-ordination is possible in a location based on the following: - antenna directivity/antenna patterns, rather than EIRP¹-based co-ordination - antenna down-tilting - AAS, for which a coverage radius for the base station might be stipulated to define the AAS beam characteristics
Bandwidth used	- The current flexibility on bandwidth requirements, based on multiples of 10MHz bandwidth, seems appropriate, as it provides users with flexibility and ensures some flexibility in accommodating competing demands in a location - given high traffic levels for some use cases, our research suggests most applicants will likely prefer to carry on using a 100MHz channel as today and future applications might require multiples of 100MHz channels (for example, for multiple live video streams or AR/VR applications)

There is benefit in reducing application timescales to meet current and future use case requirements, and in making the co-ordination process more visible

- We think key priorities for the licensing process are to reduce application timescales, and to give more visibility of the co-ordination process
- With a view to reducing application timescales, **putting the application process online** seems to be an immediate priority
- Various approaches could also be considered to increase visibility of the assignment process and give some indication of likelihood of success – for example:
 - identify a single point of contact within Ofcom for SAL applications
 - create user accounts so that information on organisations who are regularly applying for SALs, or hold multiple licences in different locations is easily accessible both to the organisation, and to Ofcom
 - provide transparency to applicants concerning the co-ordination process including the current ‘exceptions process’ (for processing of applications that depart from the standard conditions)
 - consider if high-level information on current SAL locations and frequencies can be made more accessible to aid applicants when assessing if a location is likely to be viable
- With regards to evolution of the licensing approach, our conclusion is the current **Ofcom-managed process for granting of individual licences for requested locations seems suitable to address current and future use cases** requiring customised licences in terms of geographic area/bandwidth
- Whilst noting that some parties are expressing a desire for opportunistic access to spectrum via design of a dynamic spectrum access (DSA) solution, our conclusion is that the current Ofcom-managed co-ordination process for granting of individual licences appears suitable to address use cases requiring customised licences for specific locations and bandwidths
 - we note that a DSA process with geolocation and sensing (e.g. like USA CBRS¹) would rely on radio equipment being designed to communicate with DSA database solutions and sense the local environment, which is not the situation in the current 5G ecosystem
 - most of the use cases rely on a certain level of quality of service and guaranteed access to the spectrum when in use
 - as a result, spectrum downtime will be limited, hence it will reduce the possibility of opportunistic access to the spectrum

Our report summarises 11 specific recommendations to improve the SAL framework, which have been assigned a priority rating

Summary of improvement suggestions to the SAL framework

No.	Recommendations	Priority
1	Seek to increase rate of licence application granting and make the process more visible (such as by putting the application process online, earlier indication of chances of applications being approved for given locations and reducing timescales between application and approval). Appoint a single point of contact at Ofcom for licensing queries relating to SALs	High
2	Consider whether a high-level summary of existing low- and medium-power assignments can be made visible to applicants through an easy-to-view interface, to give greater visibility over availability of spectrum at given locations (such as via a map showing the location of currently approved licences)	High
3	Provide an online indication (e.g. yes/no/subject to further co-ordination) as to the status of applications, to give an idea to applicants of likelihood of applicant being approved	High
4	Include details of antenna pattern in the technical details requested from applicants so that directionality of antenna radiation can be incorporated into the co-ordination process	High
5	Consider clarifying technical conditions to enable use of AAS under the current medium-power licence	High
6	Improve the visibility of the 'exceptions process' (i.e. the co-ordination process undertaken by Ofcom to consider applications that depart from the standard conditions). Greater transparency to applicants on timescales for the process, and better dialogue over mitigation factors that might improve the success of co-ordination (e.g. antenna directivity, change in location, down-tilting, etc.) could be beneficial	High
7	Consider if medium-power licences can be applied for in some/selected non-rural postcode areas (once patterns of demand are clearer and Ofcom has a greater understanding of likely spectrum demand based on numbers and types of licences applied for to date)	Medium
8	Give flexibility to applicants to apply to use more than one base station in deployments at a given location under a medium power licence (e.g. to provide coverage between buildings in a larger site)	Medium
9	Offer more flexible short-term licence durations for content production deployments and update the fee structure accordingly for shorter-duration licences to encourage efficient use of the spectrum	Low
10	Examine how to maintain a level playing field for multiple applicants applying for a SAL to respond to the same customer need (e.g. in response to a customer who has issued a request for proposals via a competitive tender). Consider adding 'customer name' to the application so that Ofcom is able to identify where multiple applicants are applying for spectrum to respond to the same customer	Low
11	Continue to allow applicants to resolve co-ordination issues locally through suitable market means, such as synchronisation of TDD ¹ timing using GPS ²	Low

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Contact details

Janette Stewart

Partner

janette.stewart@analysismason.com

Chris Nickerson

Manager

chris.nickerson@analysismason.com

Bonn

Tel: +49 228 3876 9474
bonn@analysismason.com

Cambridge

Tel: +44 (0)1223 460600
cambridge@analysismason.com

Dubai

Tel: +971 (0)4 446 7473
dubai@analysismason.com

Dublin

Tel: +353 (0)1 602 4755
dublin@analysismason.com

Hong Kong

hongkong@analysismason.com

Kolkata

Tel: +91 33 4084 5700
kolkata@analysismason.com

London

Tel: +44 (0)20 7395 9000
london@analysismason.com

Lund

Tel: +46 8 587 120 00
lund@analysismason.com

Madrid

Tel: +34 91 399 5016
madrid@analysismason.com

Manchester

Tel: +44 (0)161 877 7808
manchester@analysismason.com

Milan

Tel: +39 02 76 31 88 34
milan@analysismason.com

New Delhi

Tel: +91 124 4501860
newdelhi@analysismason.com

New York

Tel: +1 212 944 5100
newyork@analysismason.com

Oslo

Tel: +47 905 59 075
oslo@analysismason.com

Paris

Tel: +33 (0)1 72 71 96 96
paris@analysismason.com

Singapore

Tel: +65 6493 6038
singapore@analysismason.com

Stockholm

Tel: +46 8 587 120 00
stockholm@analysismason.com



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