

# **Building the UK's fastest 5G network**

**Graham Baxter 10 April 2019**



# The UK's challenger brand

Letting our customers do more

**10m**

Customers

**8.3GB**

Average monthly  
customer data usage

**3.5x**

More data usage than  
the industry average

**99%**

Population coverage

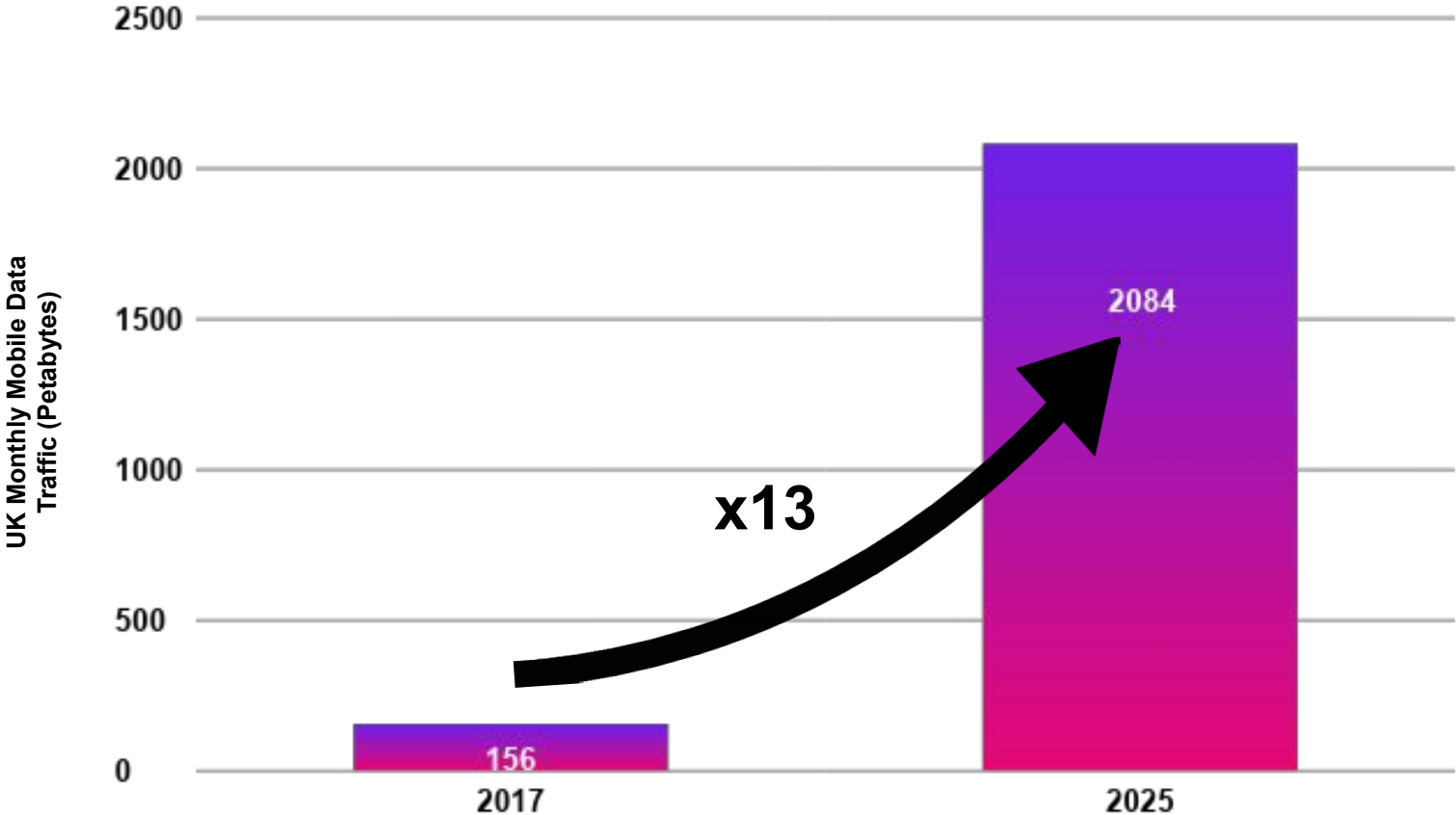
**+15**

Net Promoter Score;  
Highest of any MNO

**+21**

Employee Net  
Promoter Score

# Customer demand for mobile data



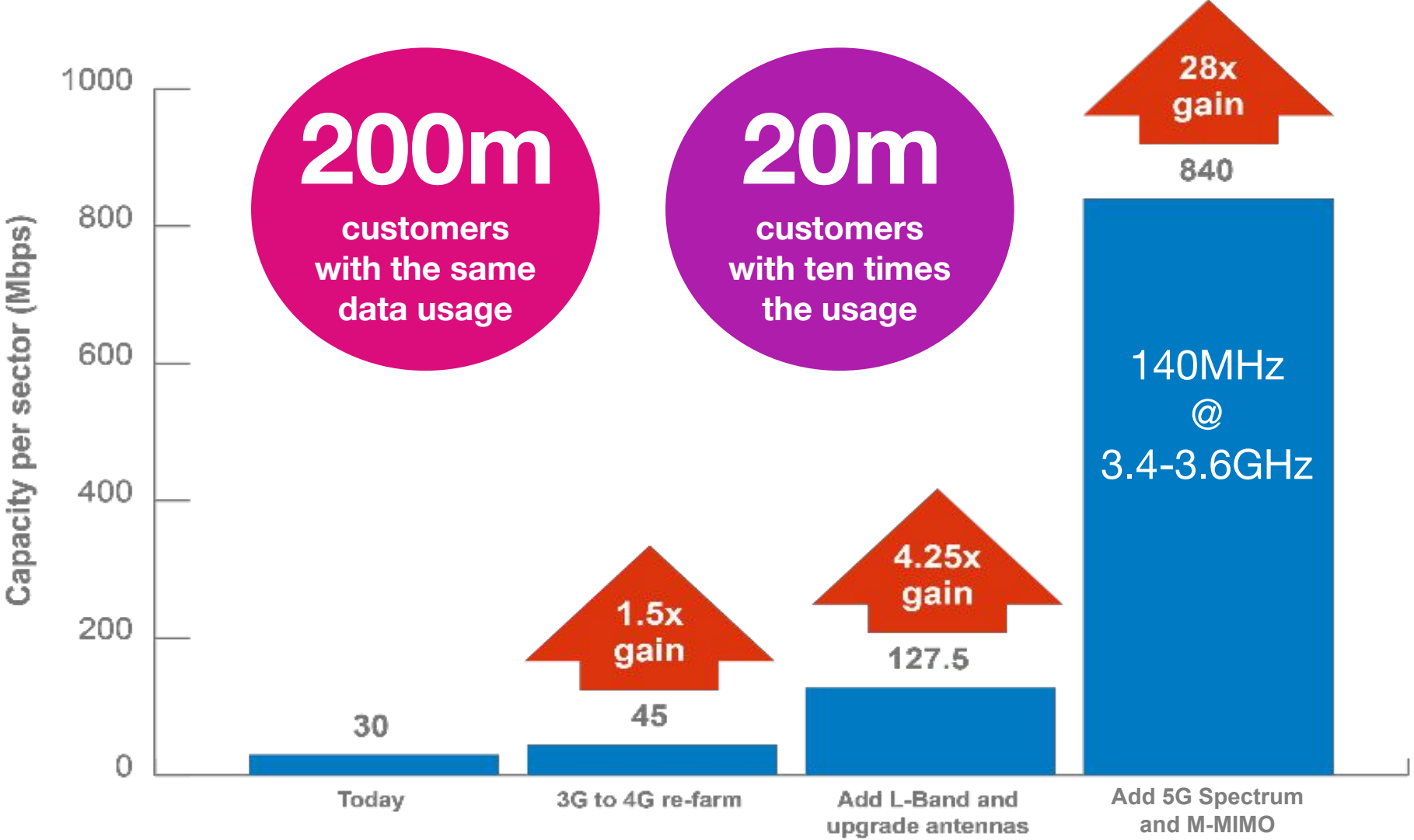
At current Ofcom projections, an average Three UK customer will use

**90GB**

per month by 2025

Source: Ofcom's Mobile Data Strategy, June 2016

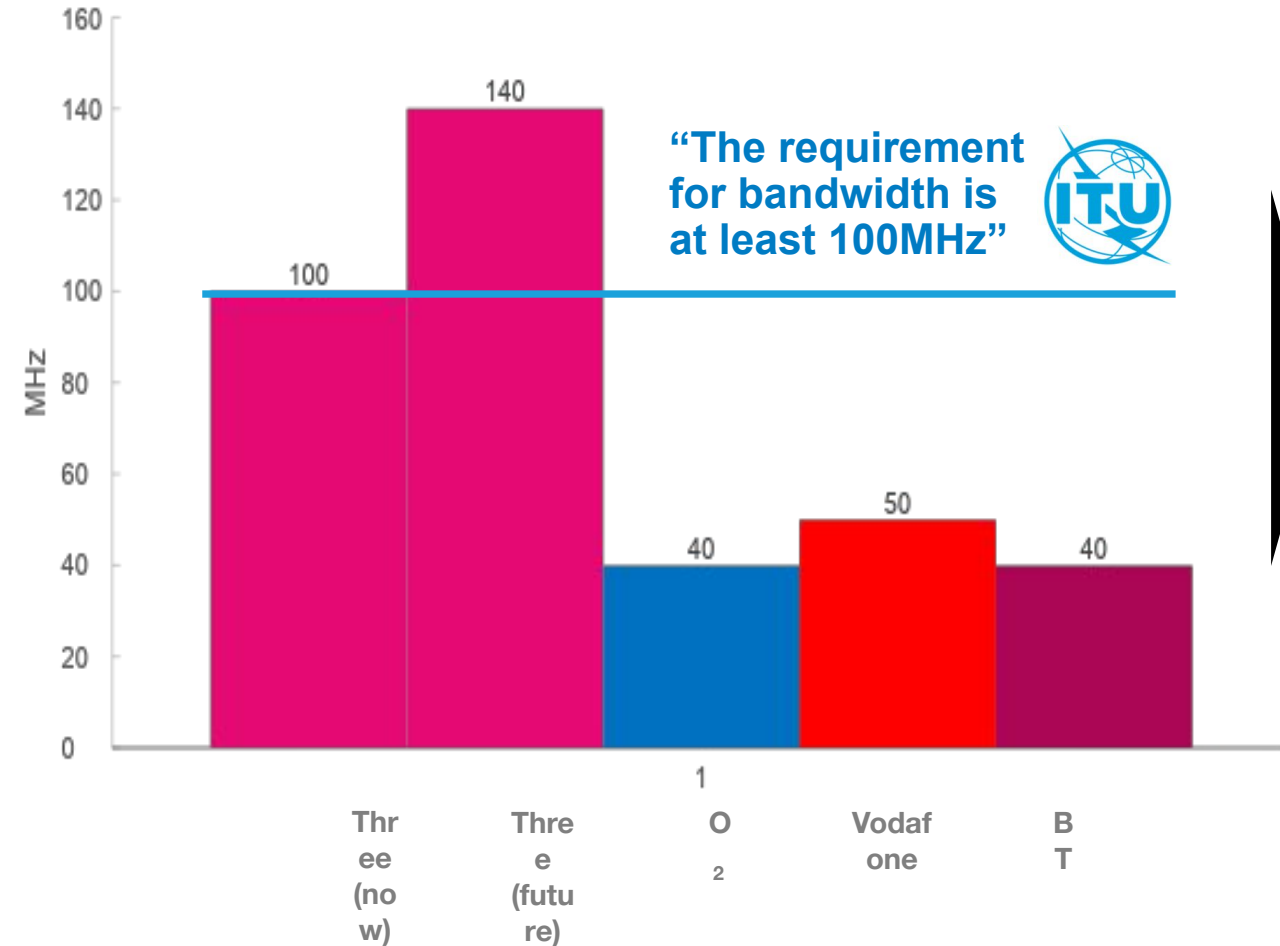
# Securing near term capacity needs



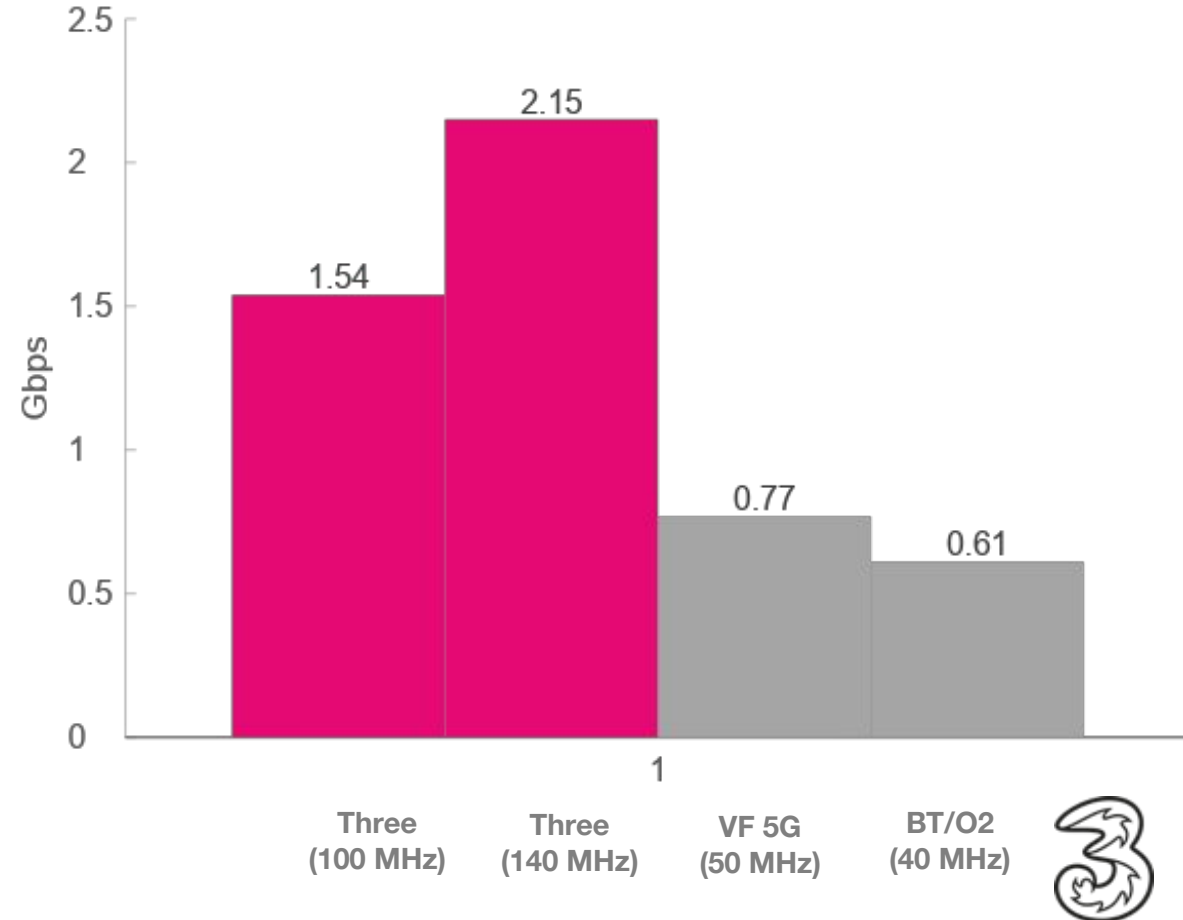
# We are in an incredible position

Three's 100 MHz contiguous bandwidth sets the benchmark for 5G speeds in the UK

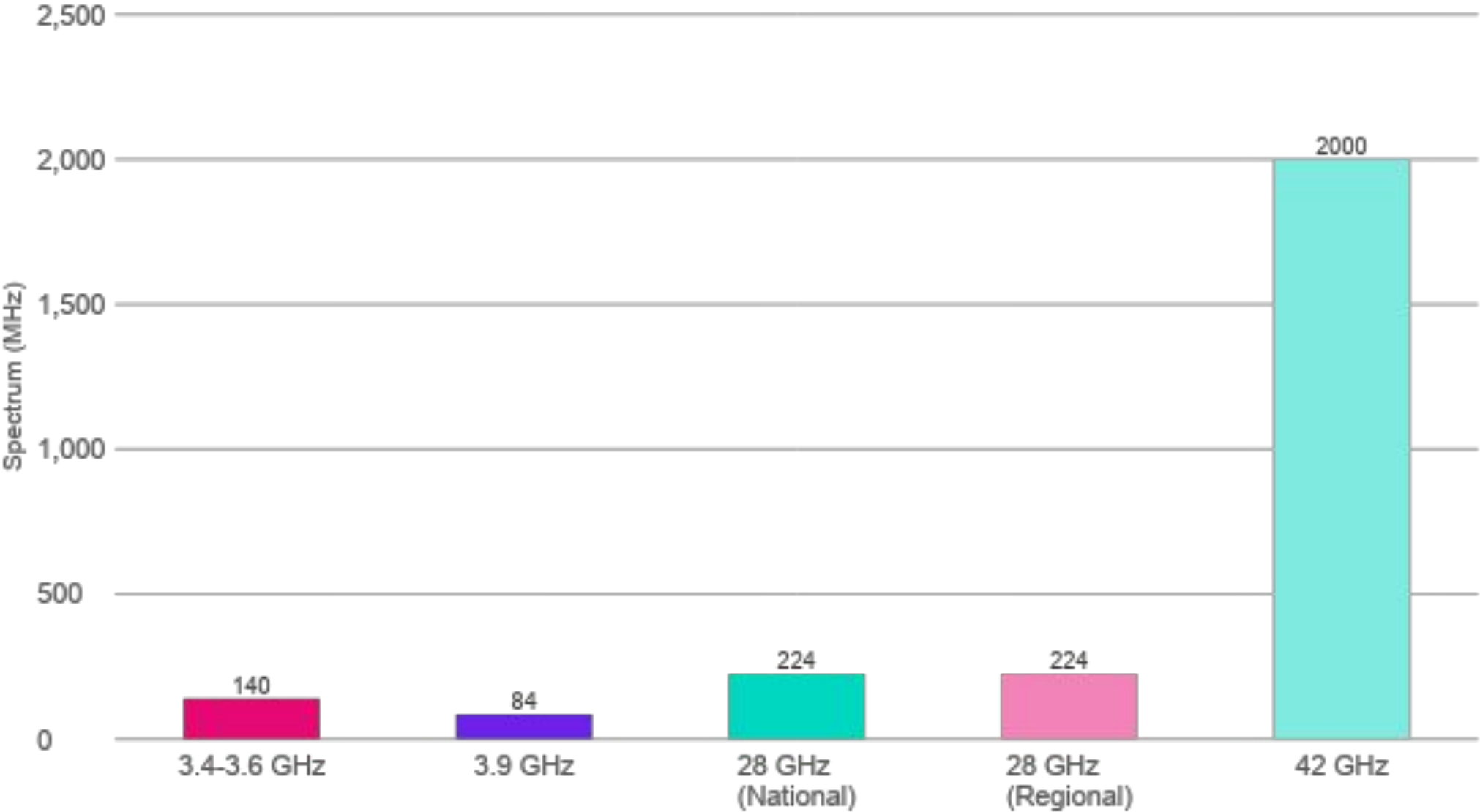
5G Spectrum Position



Peak 5G Speeds (by 2020)



# Securing longer term capacity needs



# 5G foundations

- Mobile
- Home
- IoT
- Low Latency

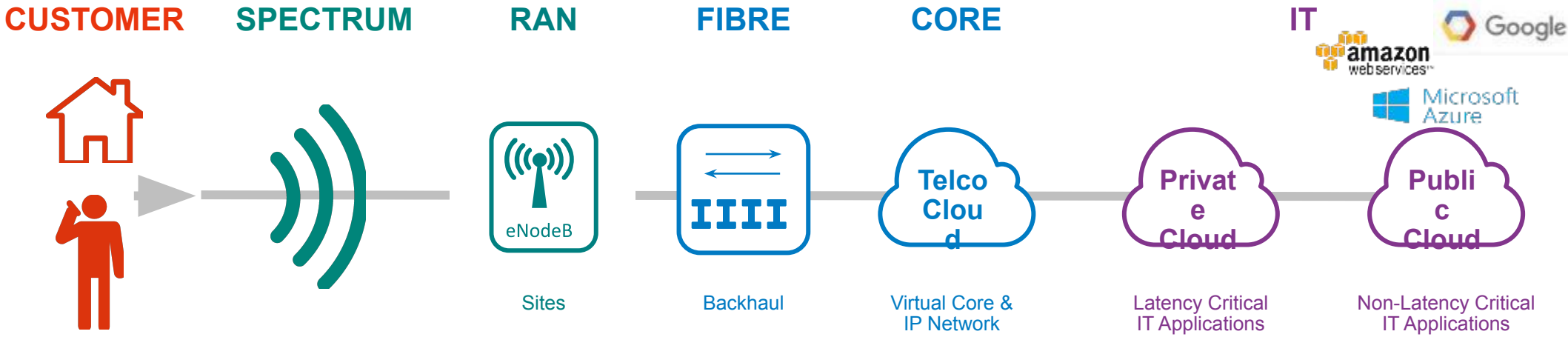
- 140MHz@3.4-3.6G Hz
- 84MHz@3.9GHz
- 448MHz@28GHz
- 2GHz@ 42GHz

- MBNL Network Share
- RAN Swap
- M-MIMO

- Edge Data Centres
- Fibre Backbone
- Aggregation

- Greenfield Cloud Core Network

- Greenfield IT



# Three Broadband

- 780k broadband subscribers nationwide/20k in Central London
- Same day delivery (Central London)
- Plug and Play
- No contract
- Proven on 4G, supercharged on 5G
- Above **20MBPS** average speed
- Average customer usage **105GB** (per customer per month)
- **£22** ACYE Data





# How regulation can impact investment

## case

### 1. FIBRE

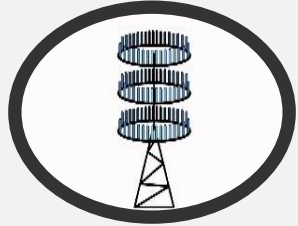
Cheaper, faster access to **fibre**



- Incentivise fibre deployment by Virgin, CityFibre, Hyperoptic and Gigaclear (via unrestricted Duct and Pole Access)

### 2. SITE BUILD

Cheaper, faster **5G rollout**



- Fast-track planning permissions
- Business rates relief on sites upgraded to 5G

### 3. SPECTRUM

Cost & availability of **5G spectrum**



- Leasing of mobile spectrum allowed
- Impact of ALFs on speed of 5G rollout

### 4. NET NEUTRALITY

Enable **5G monetisation**



- Net Neutrality to enable 5G network slicing and monetisation

### 5. COVERAGE

**Improved coverage for all**



- Single MNO rural network / rural roaming
- No coverage obligations in 2020 auction

# What does this mean for the customer?

- **UK's fastest 5G network**
- **Superfast downloads**
- **High-definition video streaming**
- **Lower latency – responsive games and apps**
- **5G home broadband**
- **IOT**
- **Enhanced reliability**