

Private Networks: Opportunity or threat for mobile operators?

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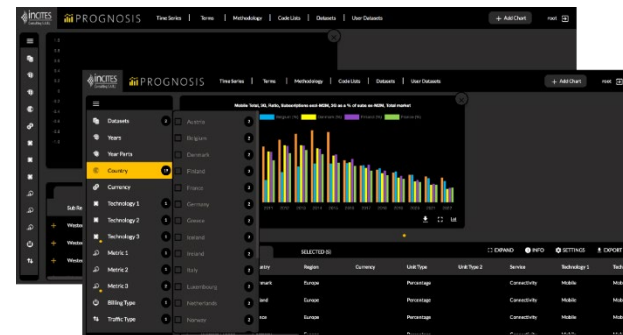
29 November 2022 – 24th Infocom World

What we do

Consulting

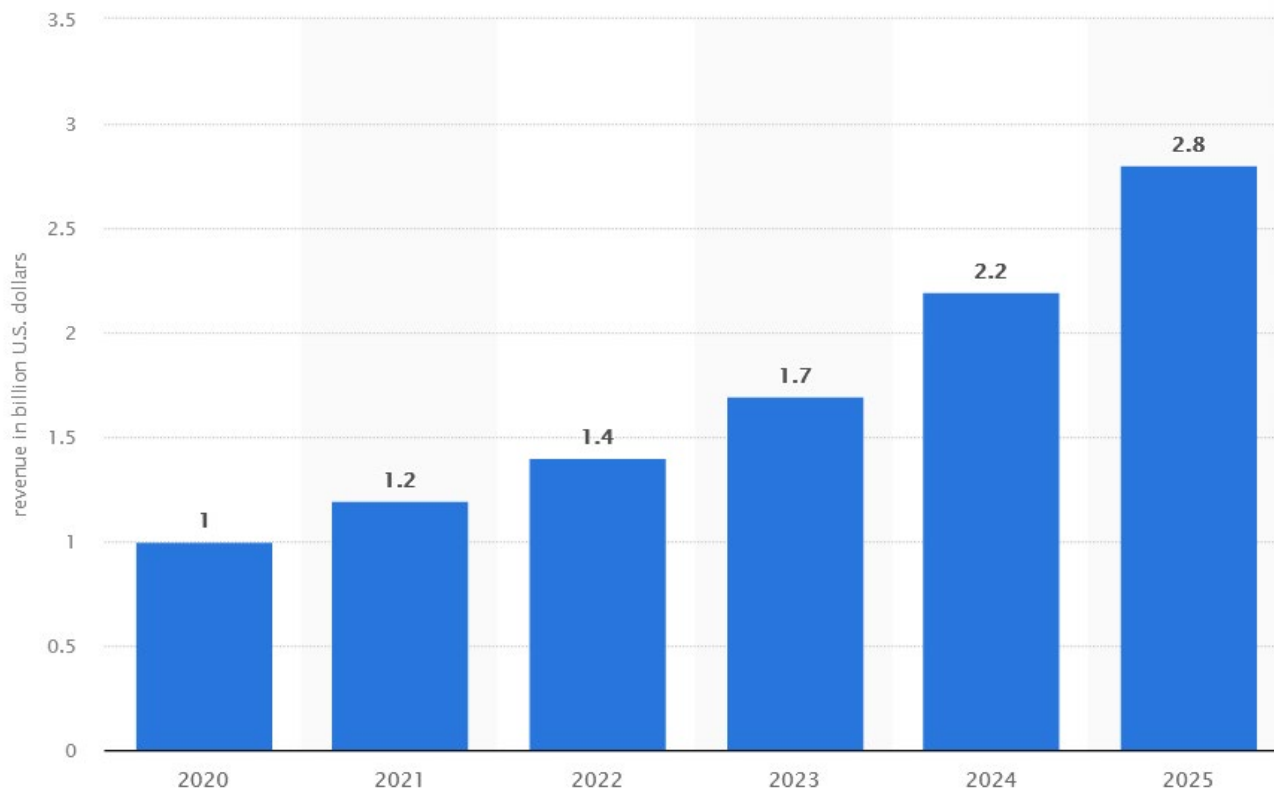
Research

Prognosis



Worldwide private LTE/5G infrastructure revenue 2020-2025

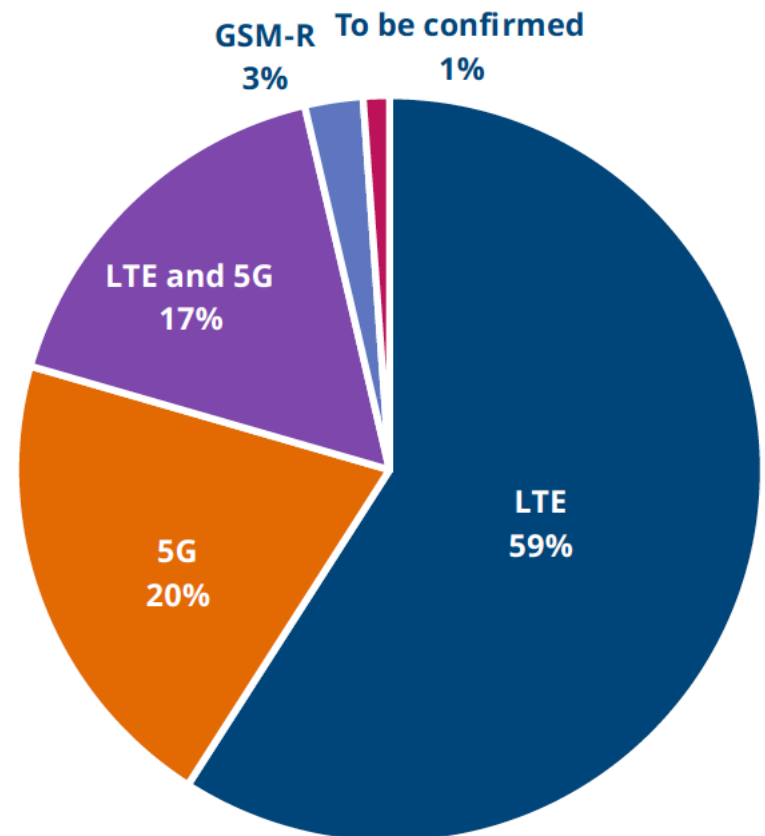
**A 2.8 bUSD
market by
2025**



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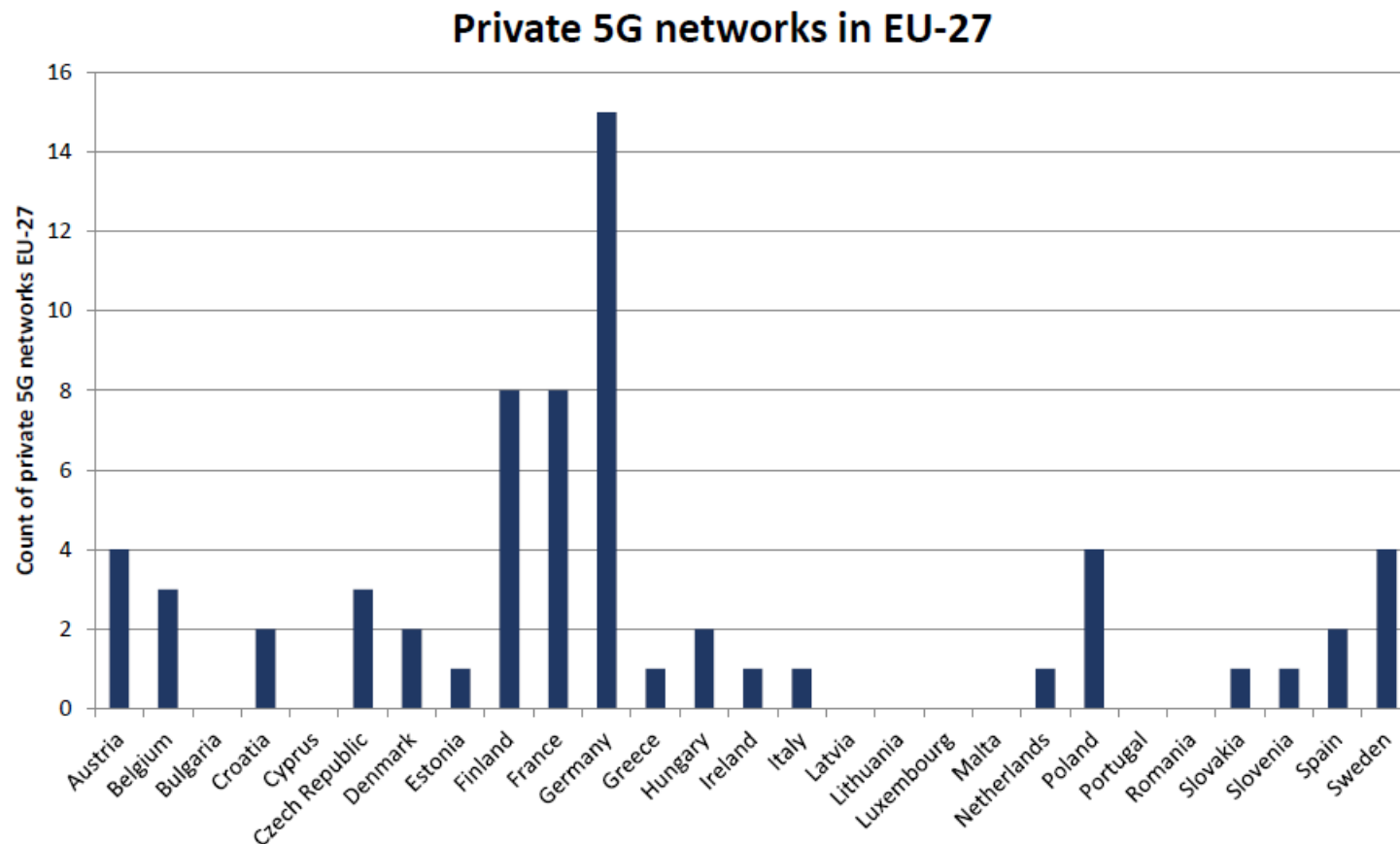
The private networks market today

- 794 organisations in 68 countries have deployed private networks
- 37% of implementations use 5G



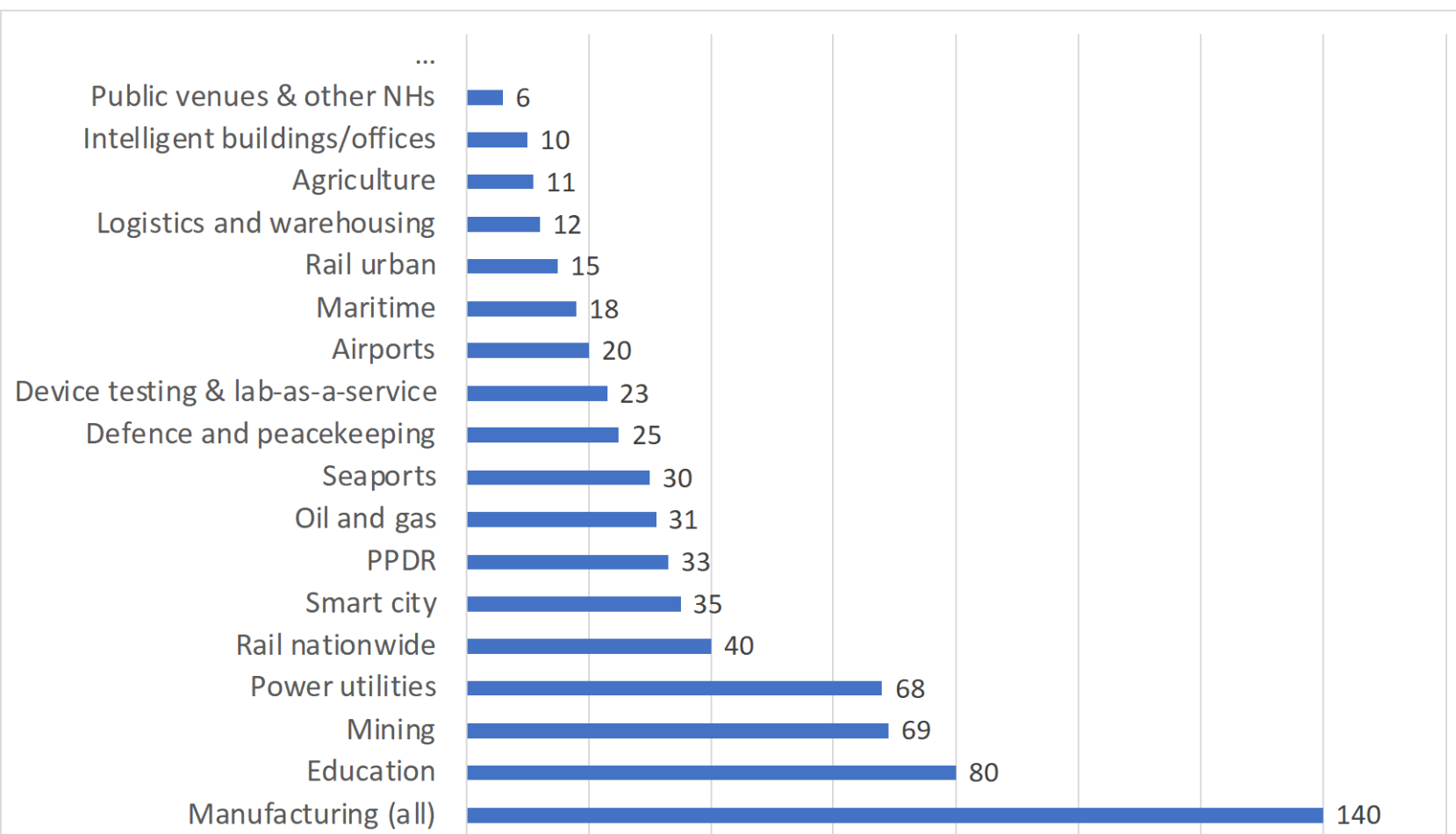
Source: GSA July 2022

> 60 Private 5G networks in the EU

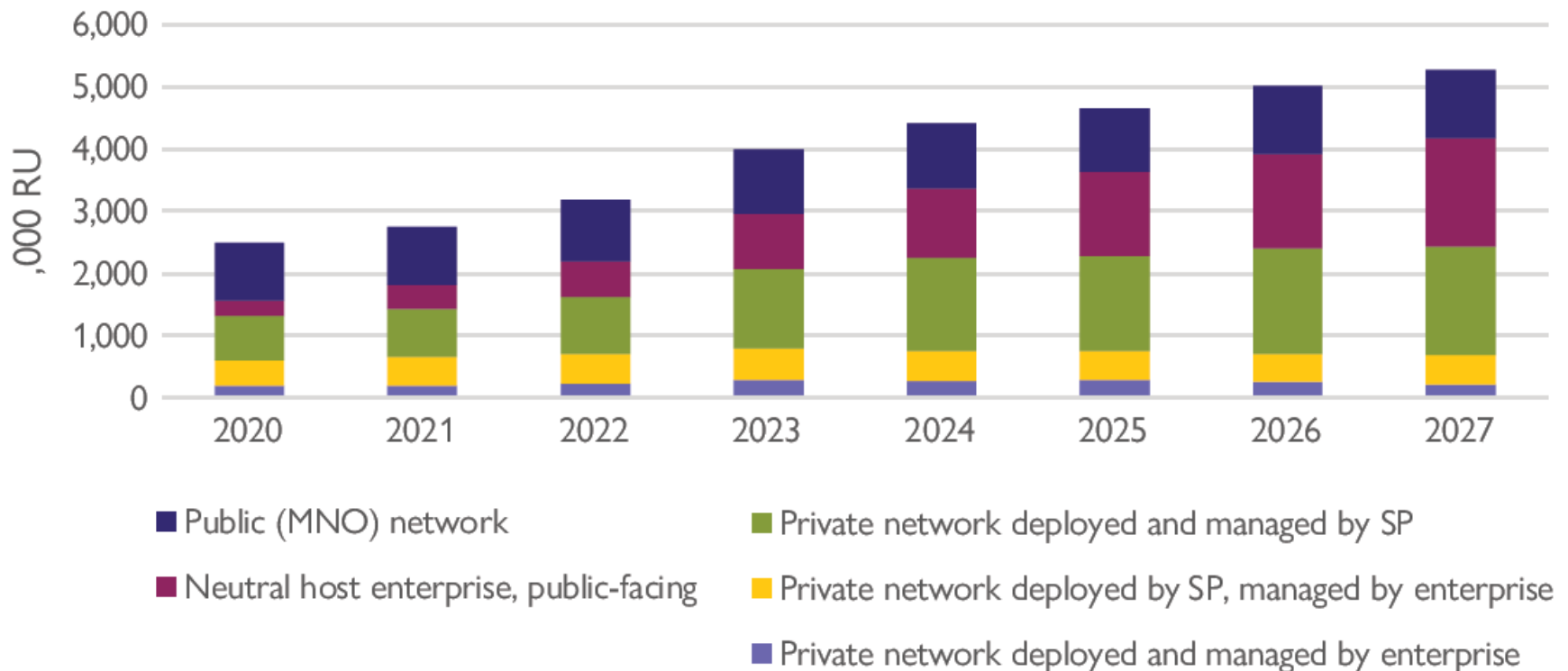


DISCLAIMER: There are more 5G private networks deployed in practice, noting the data is based on search of publicly announced deployments and subject to continuous change.

Private networks per industry...

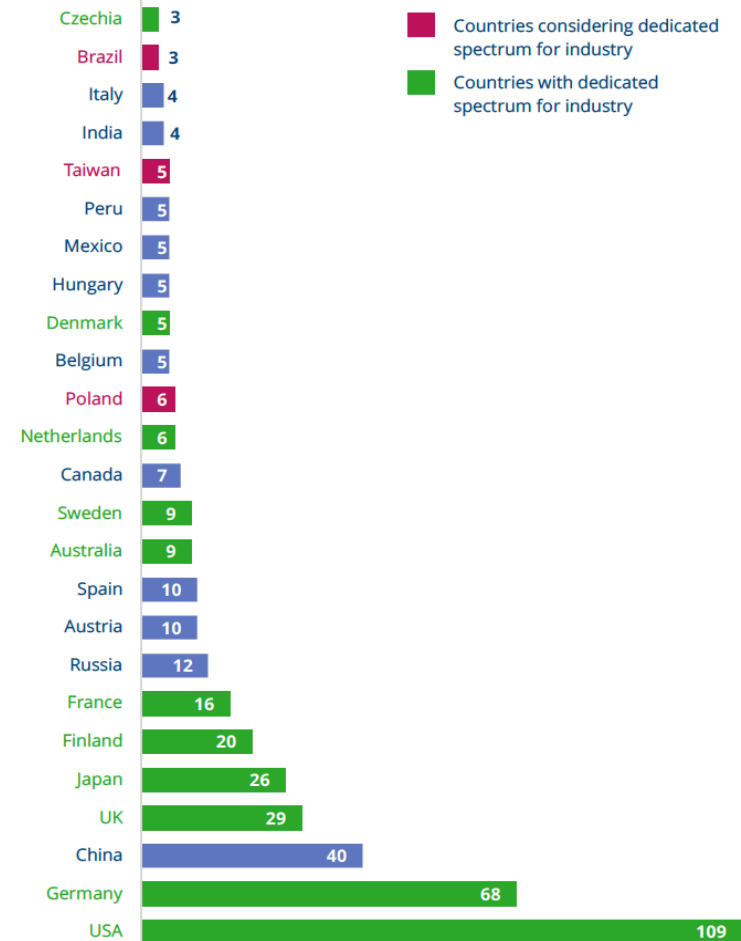
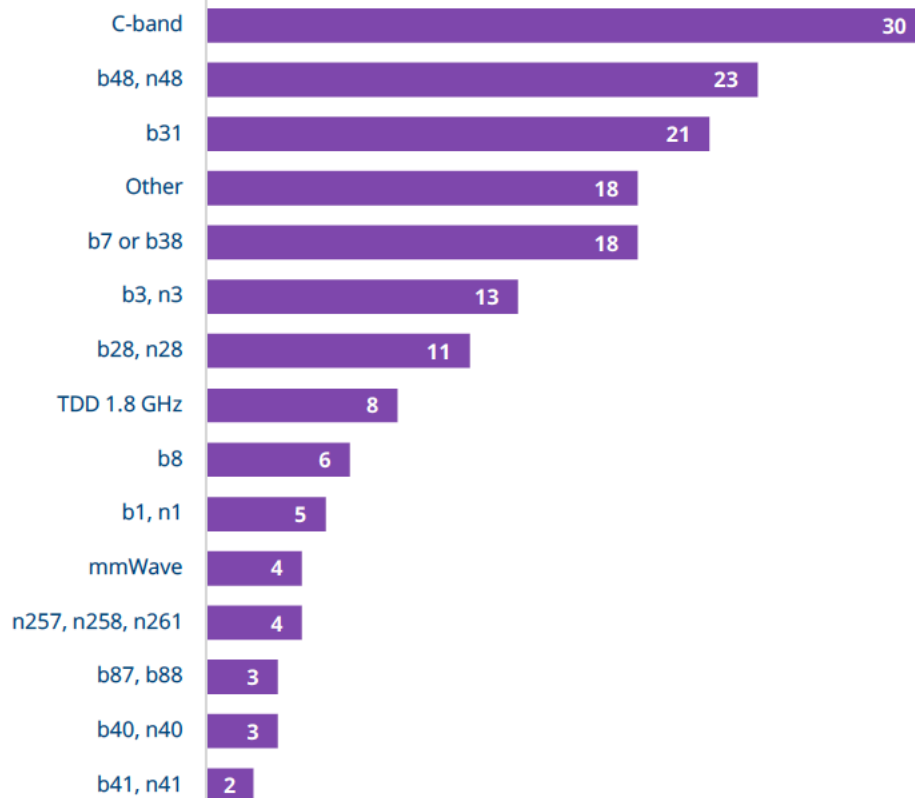


Private Networks Market Players



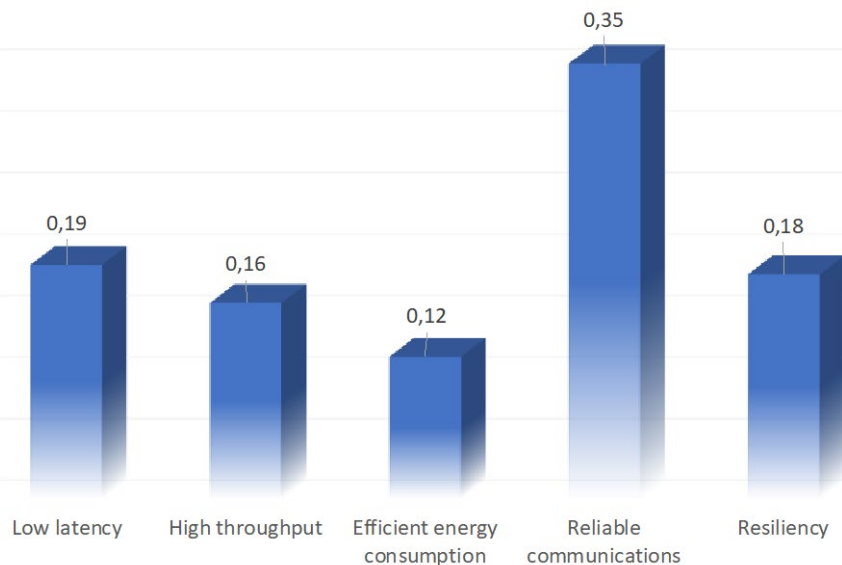
Source: SCF July 2022

Spectrum used...

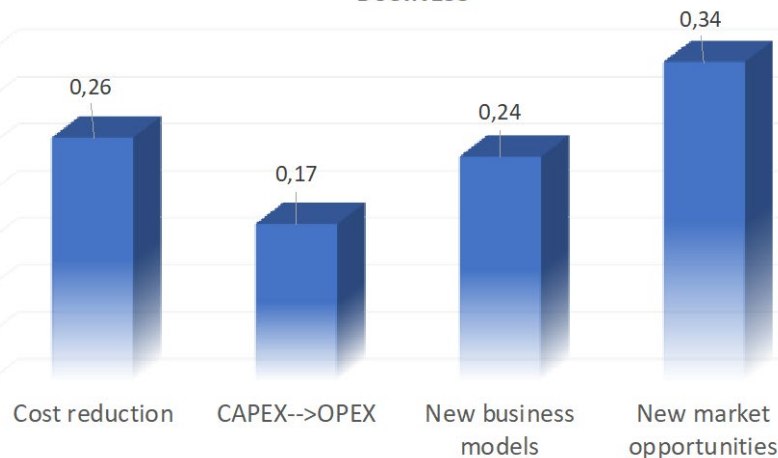


Factors Affecting the Adoption of Private Networks (1/2)

PERFORMANCE



BUSINESS



Source: inCITES January 2022 for
[Affordable5G](#) EU Horizon project

Factors Affecting the Adoption of Private Networks (2/2)

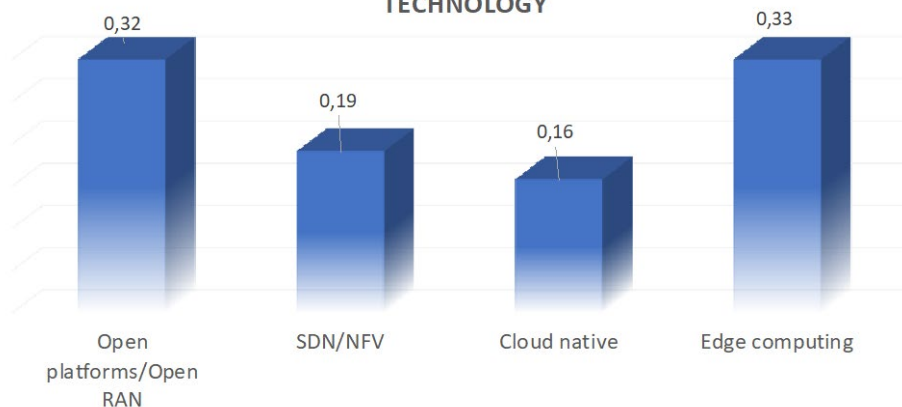
FLEXIBILITY



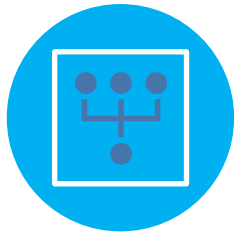
ACCEPTANCE



TECHNOLOGY



A new era dawning...



RETHINK WAYS OF WORKING

Need for customized, co-developed solutions by MNOs in collaboration with enterprise customers



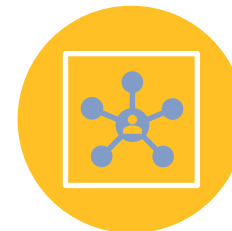
RETHINK SPECTRUM LICENSING

Shared use/local licenses may be needed to unlock the full potential of private networks



RETHINK MARKET ADOPTION

New market opportunities, Security & privacy, Ease of deployment are key factors



RETHINK COMPETITION

New players have already entered the market and compete with the MNOs

Thank you!



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