



View from the UK

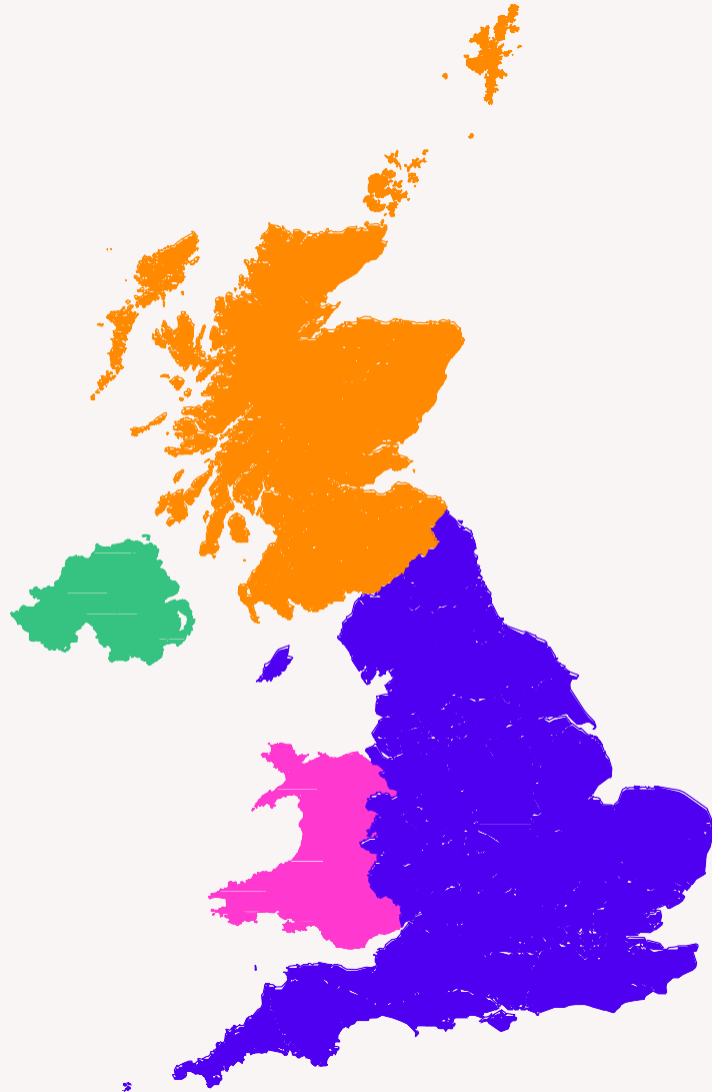
52:10

David Willis, Group Director,
Spectrum

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2025



UK connectivity at a glance



Coverage data as of Spring 2025.

Fixed Networks

Homes Passed

74% Full Fibre

86% Gigabit (Full Fibre + Cable) 97% Superfast (> 30 Mbps)

<1% below 10 Mbps

Mobile Networks

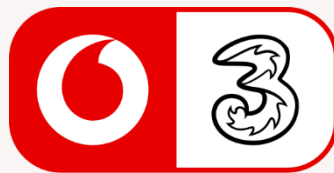
> 99% 4G outside premises

> 96% 5G outside premises

95% 4G geographic coverage WIP

Authorising D2D in IMT bands

c. 500 C-Band Shared Access Licences



Spectrum sharing is key to our spectrum strategy

Shared Access for 5G

- Enabling local networks in 3.8-4.2 GHz for industry & enterprise
- Introducing 'pop up' networks in 2.3 GHz

mmWave (26 & 42 GHz)

- Local licences across the UK
- Auctions in areas of high population

1.4 GHz SDL

- Coexistence with adjacent channel satellite terminals

D2D in IMT bands

- Sharing between satellite and terrestrial networks

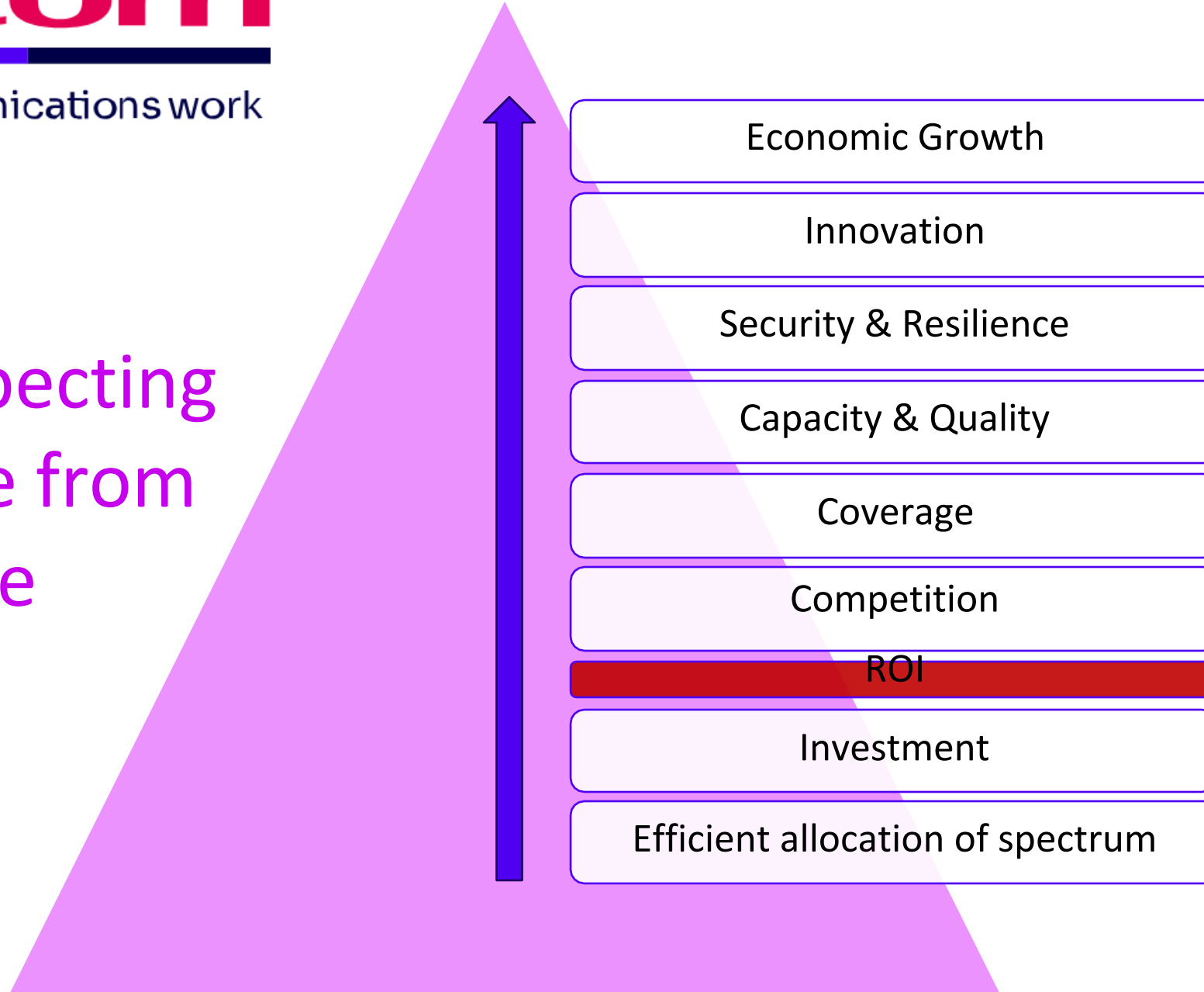
6 GHz

- AFC for Standard Power local networks
- Flexible sharing between Wi-Fi and Mobile in upper 6 GHz



Making communications work
for everyone

We're expecting
ever more from
our mobile
networks



Looking forward to 2030....

Innovation 'over the network' – implications for data growth & revenues

- AR/VR?
- Mobile Edge Compute?
- Drones and droids?
- AI as a service?
- Joint sensing and communications?

Bandwidth
Requirements?

Innovation 'in the network' – implications for capex & opex

- Increased security and resilience
- Network convergence - NTN, Wi-Fi
- Cell Free MIMO, RIS
- AI optimisation
- Sub Terahertz
- Energy efficiency & sustainability

Band Requirements?
(Low/Mid/High)



Contac t

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