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About CELLNEX TELECOM

Cellnex Telecom is Europe's leading neutral operator of wireless telecommunications infrastructures



Independent and neutral host infra player

- Longterm partnerships with Sunrise and Salt
- Over 1.4B€ investment
- #sites includes the committed BTS program

More than 60.000 sites, towers and communication nodes



Towers



Smallcell



Rooftops



Our services

- +2M connected things
- SIGFOX in Spain
- Data Platform
- LORA networks
- Use cases
- Barcelona smartcity



Smart & IoT

Mission & Business Critical

- 9 mission critical networks
- 80.000 first responders every day
- 27 private networks for Enterprise
- 1 Global Maritime Distress Safety System(GMDSS)



5G

TV Broadcasting



- +2.000 DAS nodes
- Edge Computing & mini data centers
- V2X use cases
- +40.000 Km. fiber

• In Spain

IoT

The foundations: Objects or things connected with intelligence. The functions and possibilities of objects are expanded.



“IoT enables the existence of the object outside the object”



... and disruptive sensors?

Microbial live
Lie detector (chemical sensor)

...

IoT - The value chain



15 - 30%



10 - 15%



10-15%



Call to Action

What's the question?



Business Model



Culture & Organization

Switzerland

A European View of the Swiss IoT Market

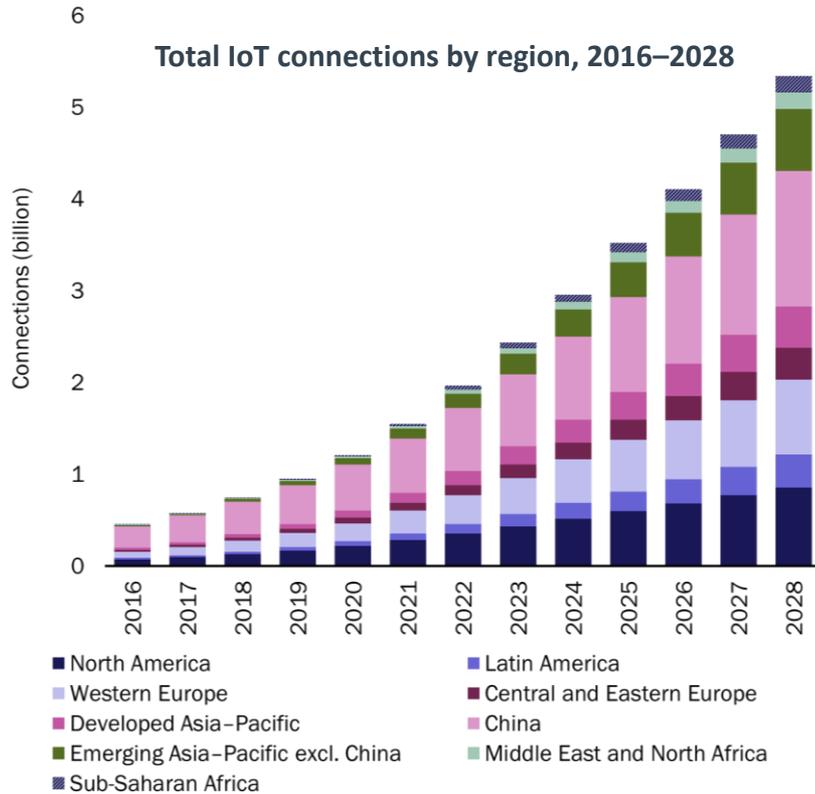
“Small, but beautiful?”

- Full presence of all relevant IoT carriers (LTE-M, NB-IoT, LoRa, Sigfox, etc)
- Fully developed eco-system with academic support and origination hubs (EPFL, ETH, etc)
- Strong political and financial support for digitisation (Swiss DigitalDay, Federal/Cantonal funding)
- Rich start-up culture and inside-out vision for products and services beyond Switzerland
- Strong IoT cluster around Swisscom/Swiss Railways/Swiss Post
- Very strong sentiment to support environmental and sustainable products and solutions

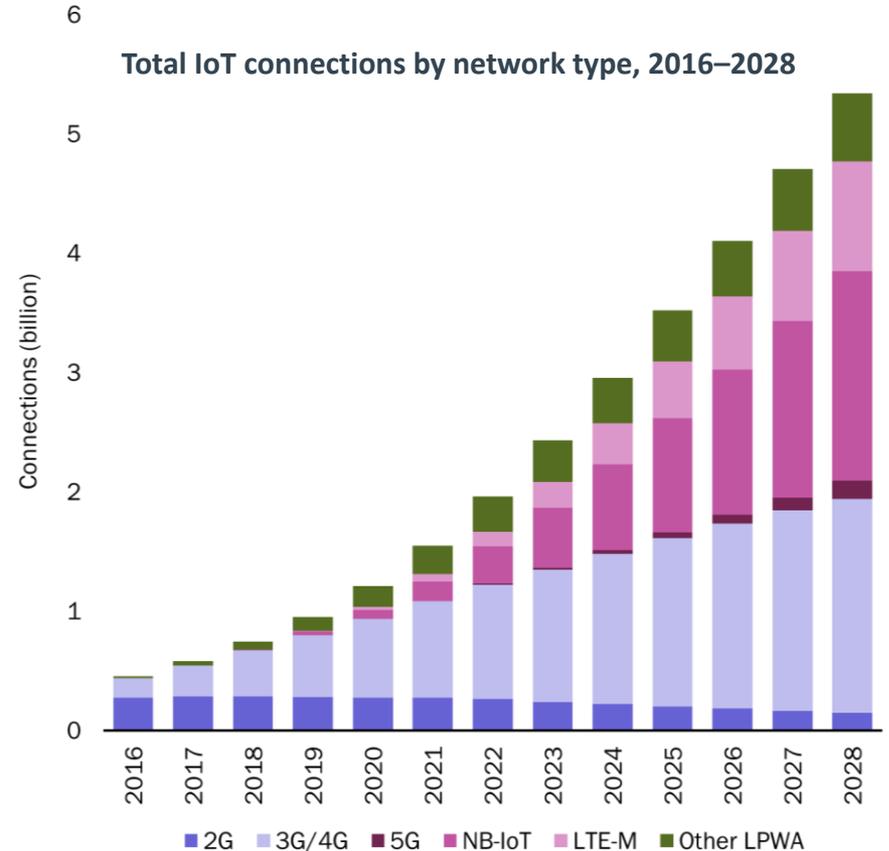
-> MORE THAN JUST BEAUTIFUL, IT CAN BE A EUROPEAN HUB OF PROGRESS AND INNOVATION

European context

Let's first have a worldwide look



Source: Analysys Mason

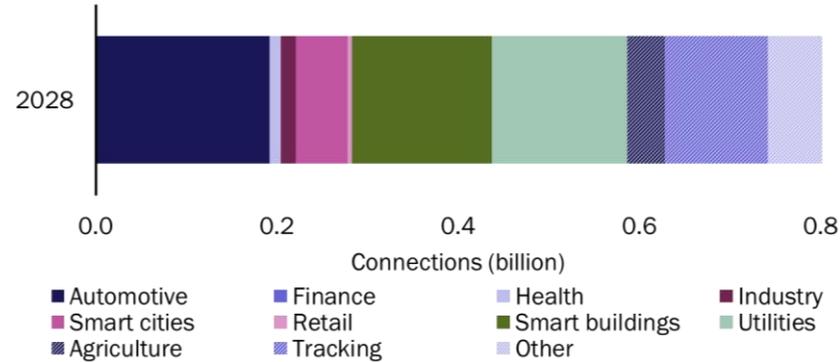


Source: Analysys Mason

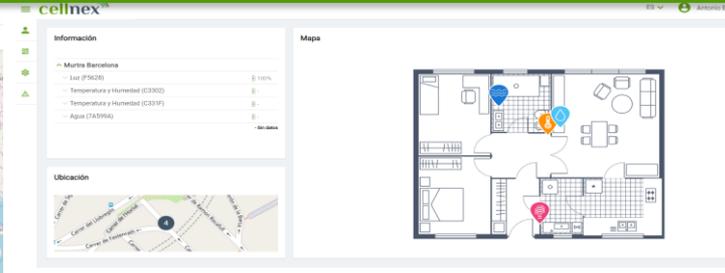
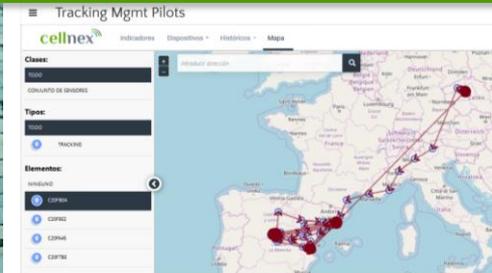
European context

What do we expect to happen?

- Western Europe will generate the third-highest IoT revenue by 2028
- The automotive sector will also be responsible for the growth of 5G IoT penetration



Source: Analysys Mason



Conclusions

What's the journey ahead of us?

- Some key challenges:
 - Lack of large scale volumes to bring down cost massively
 - Proven IoT security and data protection to gain customer trust
- How can an organization increase the value to its customer or to the business,....using IoT?
 - Standardisation within Switzerland and EU to be coordinated (ENISA, GDPR, roaming, etc)
- What is the optimal digital density? Review where interactions and data come from.....
 - Important steps to take:
 - Avoid duplication of efforts and focus quickly on reliable, scalable IoT solutions
 - Prices have to come down, need scale, need larger markets, not just local

→ CELLNEX SUPPORTING SWISS IOT DEPLOYMENT AT HOME AND ABROAD LEVERAGING ITS SKILL SET

A large crowd of people at night, holding up their phones with flashlights on, creating a sea of bright lights. The scene is dark, with the primary light source being the numerous small, bright white lights from the phone flashes. The lights are scattered across the entire frame, creating a dense, sparkling effect. In the foreground, several hands are visible, holding up smartphones. The background is filled with more people, their faces partially obscured by the darkness and the glow of the lights. The overall atmosphere is one of excitement and collective participation.

Thank you

cellnextelecom.com