Telecom Infrastructure and Real Estate
Implications for Leases, Licences, Rents, Capital Values, Funding and Terms

Chairman’s opening remarks
Andrew Farmery, Partner, Real Estate, Shoosmiths LLP

Keynote: developments from OFCOM
• The likely developments and changes in 2014 and beyond
• Developments in network technology including security and infrastructure investment
• Planning for 5G
Huw Saunders, Director, Network Infrastructure, OFCOM

Second Keynote: The app economy and the telecoms value chain – why mobile data matters?
• The role of the app economy
• Enhancing connectivity to ensure growth is maintained
• Innovation and creativity – why these are essential
• What’s next for the European app economy and how does this filter through to the wider UK market?
Tony Lavender, Chief Executive Officer, Plum Consulting

Looking forward: what the end customers want and when they will get it
• The vital role of the mobile telecommunications sector for the economy
• The end customers’ demands and expectations of the network operators
• Getting the balance right – developing networks in consultation with local communities
• What is the latest relating to local authorities plans, major hubs and open spaces when it comes to technology demands, policies and plans? What are the likely outcomes and consequences for real estate?
John Cooke, Executive Director, Mobile Operators Association (MOA)

Developments in telecom technology and the implications for real estate needs
• How the evolution of technological expansion has changed the landscape
• The impact on network infrastructure
• Sharing the benefits and reaping the rewards for real estate – how you can maximise the benefits from the expansion and technology advances
• Site and network sharing to enhance real estate value
Philip Morris, Director, Cell:cm Chartered Surveyors

Major holes in current coverage and the opportunities for real estate in filling them
• Fixing the problem – how to fill the gaps in the market
• Building and managing wireless sites and finding the missing location
• Is current infrastructure just a stop-gap and is a longer term solution required?
• Site ownership or sharing – what are the benefits and the ultimate effect on land value
• Case examples from mast sites in the UK and Netherlands
• Time to plan for 5G?
Paul Innes, Managing Director, Shere Consulting Ltd

Costs, values and trends in the market
• Latest results from the Batcheller Monkhouse survey on rental trends
• Effect on rents of Network Consolidation
• What makes one site worth more than another
• In what direction are rents heading?
Tom Bodley Scott, Partner and Head of Telecoms, Batcheller Monkhouse

PANEL: How quality and coverage impacts property values
• How important is network quality and how much does it matter?
• Does the quality of the network change land and real estate values significantly?
• Learning from transactions and valuations of a number of examples
• The real impact of the expansion in proprietary pipes on real estate values

Current thinking on licence and lease terms and rent review/lease renewal negotiations – the practical perspective
• Who’s your tenant/occupier
• Who’s operating from the site
• Equipment and user permissions
• Break options for owner and operator
• Rent review processes
• Renewal processes considering Landlord and Tenant 1954 Act and E-Comms Code
• Dispute resolution options
• E-Comms Code revision status
Philip Morris, Director, Cell:cm Chartered Surveyors