

DRIVERS FOR OUR CONNECTED AGE

Recognising the unique role of spectrum
for mobile broadband

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SUPPORT MASSIVE CAPACITY GROWTH



GLOBAL MOBILE DATA TRAFFIC IS EXPECTED TO GROW 10X FROM 2013-2019¹

HARMONISE D SPECTRUM

- Regulators can license more spectrum to mobile operators
- Must be globally harmonised spectrum and under technology neutral licences

DRIVE SPECTRUM EFFICIENCY

- Ensure all spectrum users are using this precious public resource efficiently
- This will help free up spectrum for those who need it most

ITU WRC-15

- Regulators must work together internationally to agree new mobile allocations
- This will happen at the World Radiocommunication Conference in 2015 (WRC-15)

¹ Ericsson mobility report June 2014

² Calculated based on Cisco's VNI (using historic data not predictions)



CONNECT THE UNCONNECTED



ONLY HALF THE WORLD'S POPULATION ARE MOBILE SUBSCRIBERS³

SUPPORT COVERAGE SPECTRUM

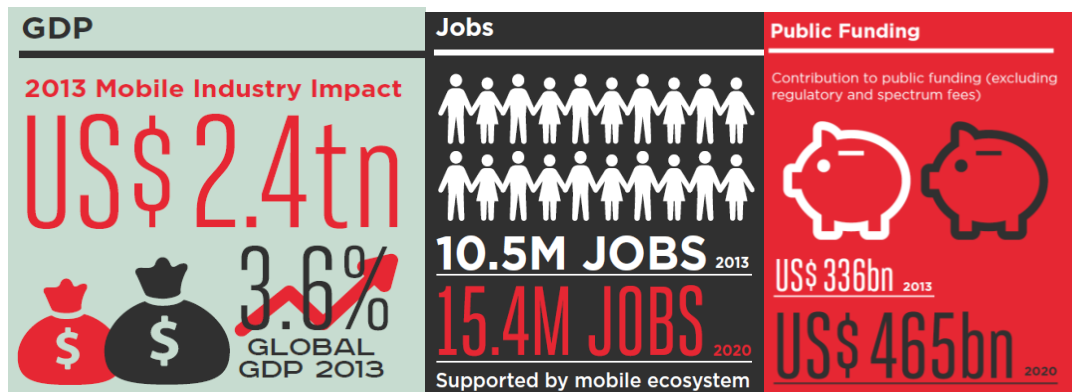
- Regulators can make more digital dividend spectrum available to mobile operators
- This spectrum reduces the cost and extends the reach & capacity of mobile

VOLUNTARY SHARING

- Support voluntary network sharing – both active and passive infrastructure sharing
- Voluntary sharing improves rural coverage without discouraging network investment

THE RIGHT FRAMEWORK

- Create a framework that supports guaranteed access to spectrum in rural areas
- This guarantees quality of service, improves coverage & encourages investment



³ GSMA Intelligence & GSMA Mobile Economy Report 2014

ENCOURAGE INVESTMENT IN NETWORKS



THE WORLD'S MOST DEVELOPED MOBILE MARKETS SUPPORT NETWORK INVESTMENT⁴

LIGHT TOUCH REGULATION

- Avoiding over-regulation encourages healthy mobile markets & investment
- Right regulatory framework will drive high quality, good value, widespread services

CLEAR SPECTRUM LICENSING

- Operators need a stable, transparent regulatory environment to invest in networks
- Fair auctions aimed at improved services, long licences, clarity on renewal etc

LONG-TERM PLAN AND ROADMAP

- Guarantees and clarity surrounding long-term regulatory plans is essential
- To make long-term investments operators need plenty information

EU vs US



- US data speeds 75% faster than EU average⁴
- US consumers use double data & 5 x voice as EU⁴
- 25% of US connections are LTE vs 3% in Western Europe⁵

⁴ Navigant report for GSMA comparing US & US (2013)

⁵ Cisco VNI 2014

THANK YOU

