REGIONAL OVERVIEW
ARAB STATES

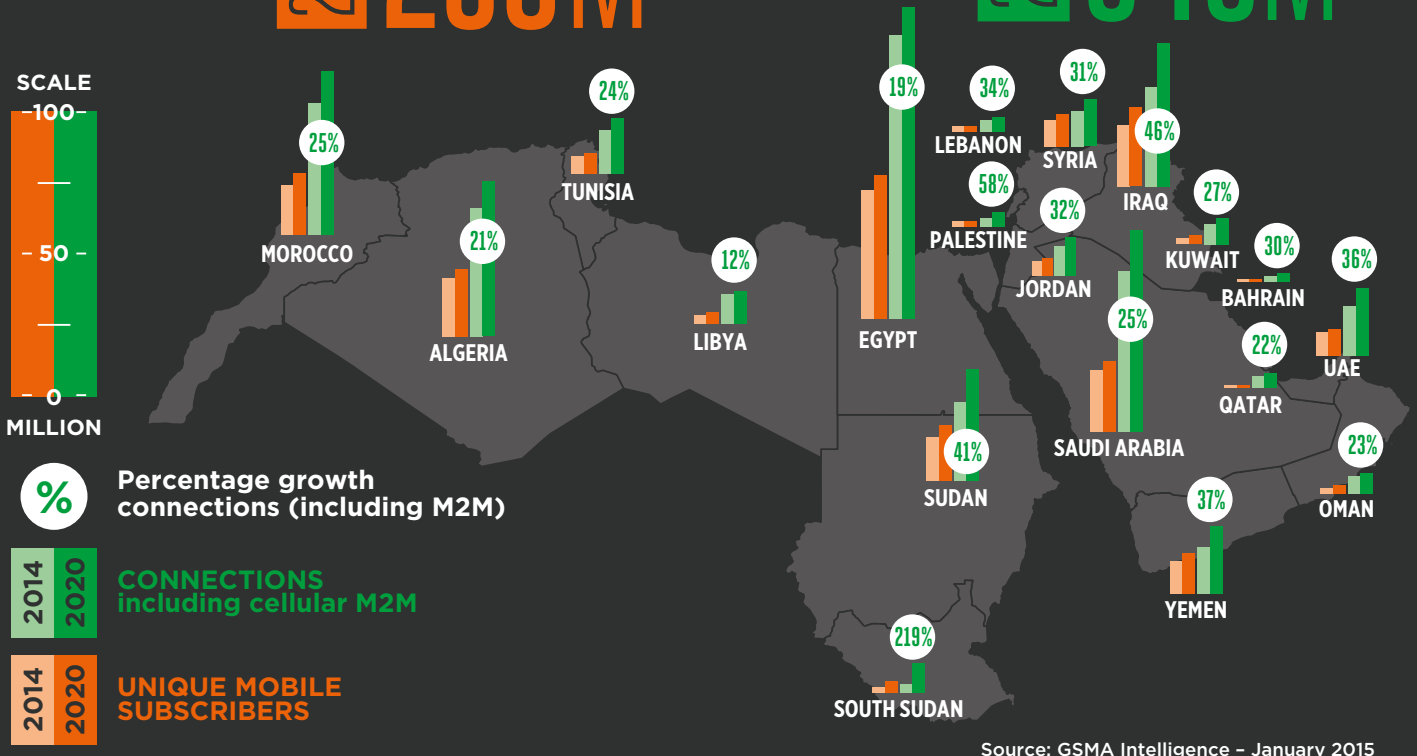
MOBILE CONNECTIVITY

UNIQUE MOBILE SUBSCRIBERS

2014 201M 2020 239M

CONNECTIONS including cellular M2M

2014 419M 2020 540M



Source: GSMA Intelligence – January 2015

ACCELERATING ADOPTION OF SMARTPHONE IS LEADING TO TREMENDOUS DATA DEMAND GROWTH

342M

By 2020, there will be 342M smartphone connections, up from only 88M at the end of 2013

14X IN 5 YEARS

In the Middle East and Africa, mobile data traffic will grow 14-fold from 2013 to 2018, CAGR 70%



GSMA calculate an average of just 206MHz of spectrum is currently licensed to mobile across the Arab States compared to Europe at 460MHz

From 2008-2013 global mobile data traffic grew an astonishing 45-fold creating an urgent need for more mobile broadband spectrum. ITU Member States have agreed to tackle this serious challenge at WRC-15 under agenda item 1.1

The ITU estimates that **1340-1960MHz** will be required by 2020 to meet mobile data traffic demand. In the MENA region, GSMA has calculated an average of just 206MHz spectrum available to mobile; this leaves a significant gap of between **1100MHz – 1700MHz**.

The ITU estimates **1340-1960 MHz** needed by 2020 to meet data demand

206MHz AVAILABLE

AVERAGE SPECTRUM SHORTFALL IN THE ARAB STATES **1100-1700MHz**

HERE'S HOW WE BELIEVE THAT SHORTFALL CAN BE FILLED



C-Band
(3.4–4.2GHz)

90 countries around the world, including 11 countries in the Arab region, have already allocated 3.4-3.6GHz to mobile. There would be significant benefits from further harmonising and extending the mobile allocation to 3.6-3.8GHz. Harmonising the spectrum in 3.4-3.6GHz and 3.6-3.8GHz for mobile broadband would provide important scale and mobile investment in this important frequency range, which would support high mobile data traffic and throughput requirements for densely populated urban areas. Over time, the C-Band will also open further as incumbent satellite operators migrate to higher frequency Ka and Ku bands to serve the evolving needs of their consumers.



2.7–2.9GHz

This band is thinly utilised across much of the Arab States, with only a small number of fixed radar systems in some cases. The band could be segmented to allow incumbents and mobile operators to use the band. ITU studies show that the band could be made available for mobile without causing interference for existing users when appropriate exclusion zones and guard bands are deployed.



Sub-700MHz UHF
(470–694/8MHz)

This band will be very important for achieving the broadest possible mobile broadband coverage in the Arab States as it allows operators to cost effectively extend the reach of their services in all areas – including rural locations and deep indoors. Currently this band supports a handful of terrestrial television broadcast channels. Re-packing existing spectrum users more efficiently would free up a portion of the band to eventually be made available for mobile broadband use.



L-Band
(1350–1518MHz)

The L band is significantly underused in most Arab countries. Growing support for a mobile identification around the world means there is an opportunity to benefit from low cost devices and widespread roaming. ITU sharing studies show that mobile services could operate in the band without causing interference to any existing users of the band, if appropriate measures are taken.

HOW YOU CAN HELP

An international mobile allocation simply provides a national regulator the flexibility to license additional spectrum for mobile when it is required to meet local market demand. Given that it can take more than a decade to move from the identification to the licensing and launch mobile services, please support mobile allocation during the WRC-15 and plan now for expected market needs in 2020-2025.

www.gsma.com/spectrum4all