GSMA MOBILE™ WORLD CONGRESS

BARCELONA 2-5 MAR 2015



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GSMA Seminar Theatre 2015

Mobile – Wi-Fi

Is there room for both licensed and unlicensed networks?

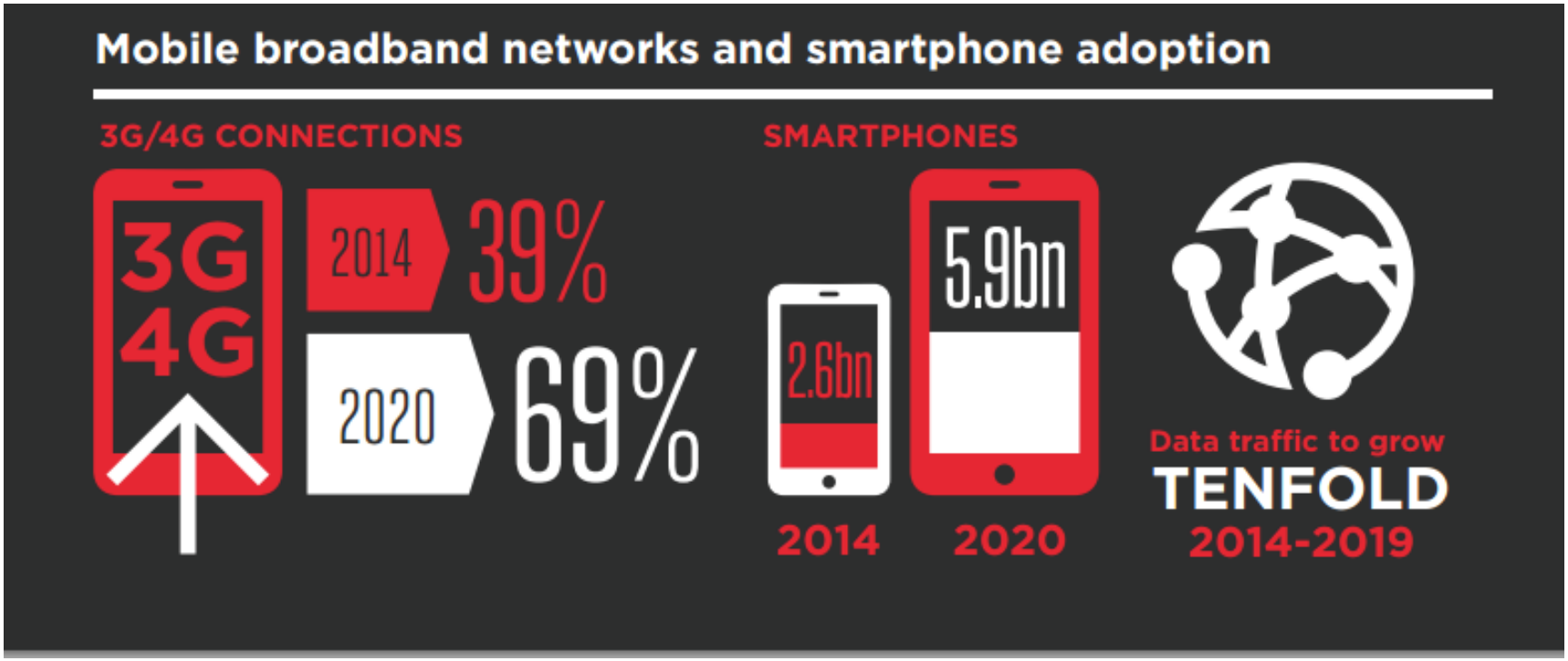
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AGENDA

- Welcome and introduction
  - Herman Schepers, GSMA
- Latest forecasts on data demand – mobile and Wi-Fi
  - Dr Robert Pepper, Cisco
- Is Wi-Fi supporting the mobile experience?
  - Ton Brand, Wireless Broadband Alliance
- The benefits of aligning industry and governments on spectrum management
  - Mike Wright, Telstra
- Panel Session
  - Moderator: Guy Daniels, Telecom TV
- Getting ready to support the spectrum ask
  - Herman Schepers, GSMA

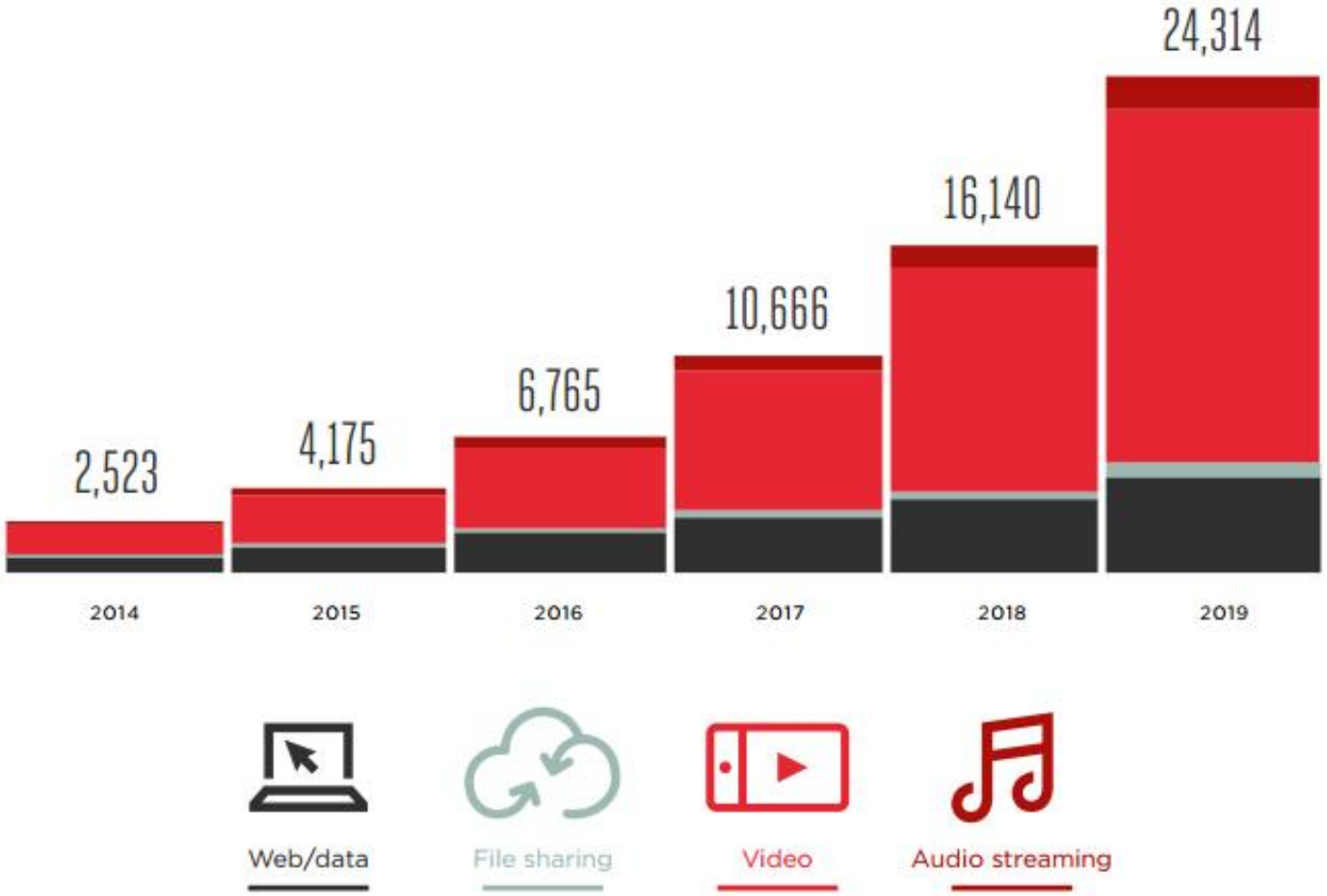
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A MOBILE BROADBAND REVOLUTION



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VIDEO FUELLING STRONG MOBILE DATA GROWTH

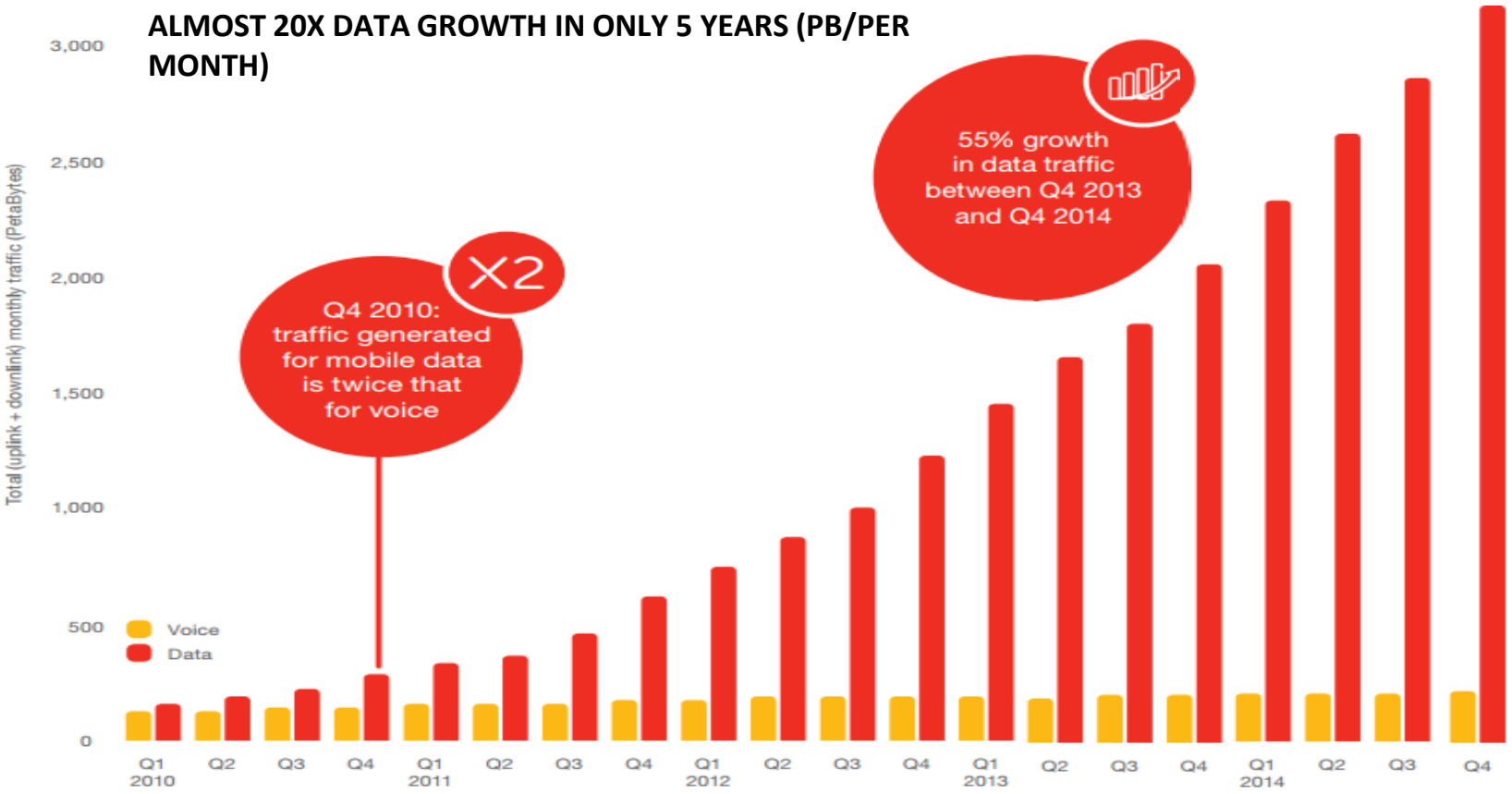


Source: Cisco VNI
PB/month

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MAJOR RECENT GLOBAL MOBILE DATA GROWTH

ALMOST 20X DATA GROWTH IN ONLY 5 YEARS (PB/PER MONTH)



SOURCE: ERICSSON MOBILITY REPORT FEB 2015

HOW CAN THIS DATA BE SUPPORTED?

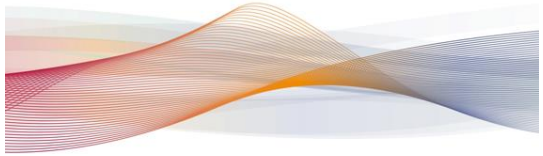
THERE ARE 4 MAIN WAYS MOBILE NETWORKS CAN SUPPORT RISING DATA

- **Increasingly spectrum efficient technologies** (e.g. HSPA+, LTE, LTE-A etc)
  - Operators actively upgrade technologies but needs to follow standards evolution and device availability for the market.
- **Denser networks** (e.g. more cell sites inc. small cells)
  - This drives up CAPEX and OPEX for equipment, backhaul, leasing sites, power etc
- **Wi-Fi offload** (i.e. shifting data on to Wi-Fi networks as much as possible)
  - Many operators have Wi-Fi hotspots but there are backhaul and network management challenges
- **Using more mobile spectrum**
  - Most cost-effective capacity enhancer so keeps network costs and consumer prices down









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PANEL SESSION

- MODERATOR
  - Guy Daniels, Editorial Director, Telecom TV

- PANELLISTS
  - Mike Wright, Group Managing Director, Networks, Telstra
  - Ton Brand, Senior Director Marketing and Industry Development, Wireless Broadband Alliance
  - Herman Schepers, Head of Spectrum Campaigns, GSMA
  - Dr Robert Pepper, Vice President, Global Technology Policy, Cisco

Survey ran at MWC-14

Do you consider the spectrum issue to be the problem for the mobile operators only?

1) Yes



15%

2) No



85%

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SPECTRUM TO SECURE THE FUTURE OF MOBILE

THE FUTURE OF MOBILE BROADBAND IS AT RISK WITHOUT MORE SPECTRUM



- **Mobile traffic is growing faster than anyone's expectations**
  - 2010-2020: Over 100x traffic growth currently expected
  - This is higher than the ITU's highest data growth predictions
- **GSMA predicts 600-800MHz more spectrum required by 2020**
  - Takes into account capacity benefits from new tech (e.g. LTE-A), Wi-Fi and small cells
- **Without it, networks will slow or require far higher investment potentially leading to higher consumer prices and falling mobile demand**
- **Everyone who values mobile has a stake in getting more spectrum**
  - We must make our voice heard to governments making spectrum decisions at WRC-15 in November

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SPECTRUM 4 ALL

DRIVING GROWTH THROUGH MOBILE

www.gsma.com/spectrum4all

spectrum4all@gsma.com

#MWC15