



S. ASEAN International Advocacy & Consultancy

Industry Summit, Promoting Digital Indonesia

Socio-economic Benefits of the Digital Transition and Key challenges

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Industry Summit

Promoting Digital Indonesia

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Key challenge three: regulatory enablers





SPECTRUM

THE FUNDAMENTAL ELEMENT OF MOBILE

Cristian Gomez

**Director, Spectrum Policy & Regulatory Affairs
Asia Pacific, GSMA**

Key challenge three: regulatory enablers

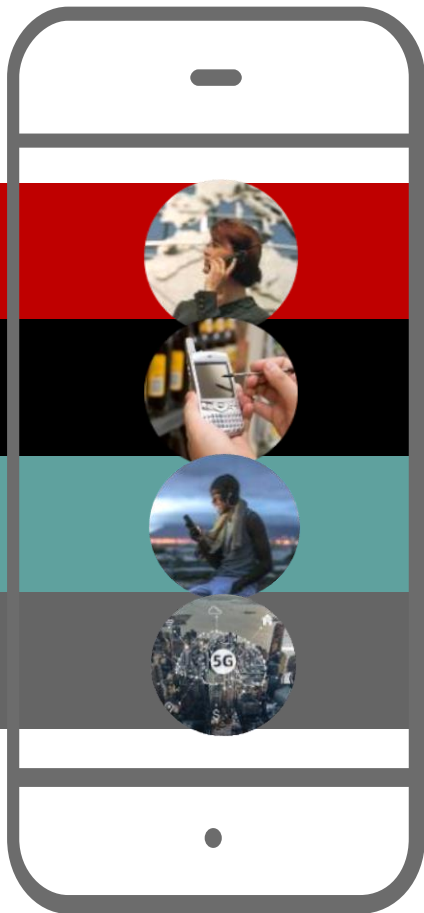


2G

3G

4G

5G



All about calls and texts

The start of mobile data

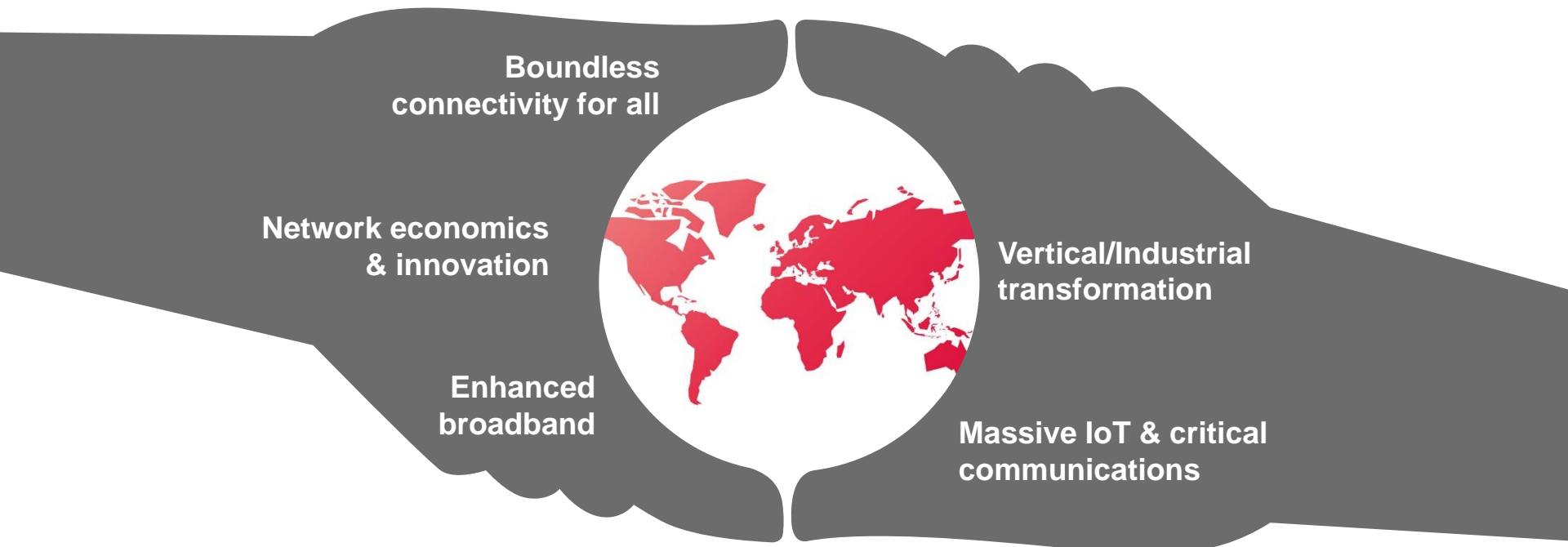
The arrival of mobile broadband services and applications

The network adapts to the application

Ultra high speed
Ultra low latency
New applications

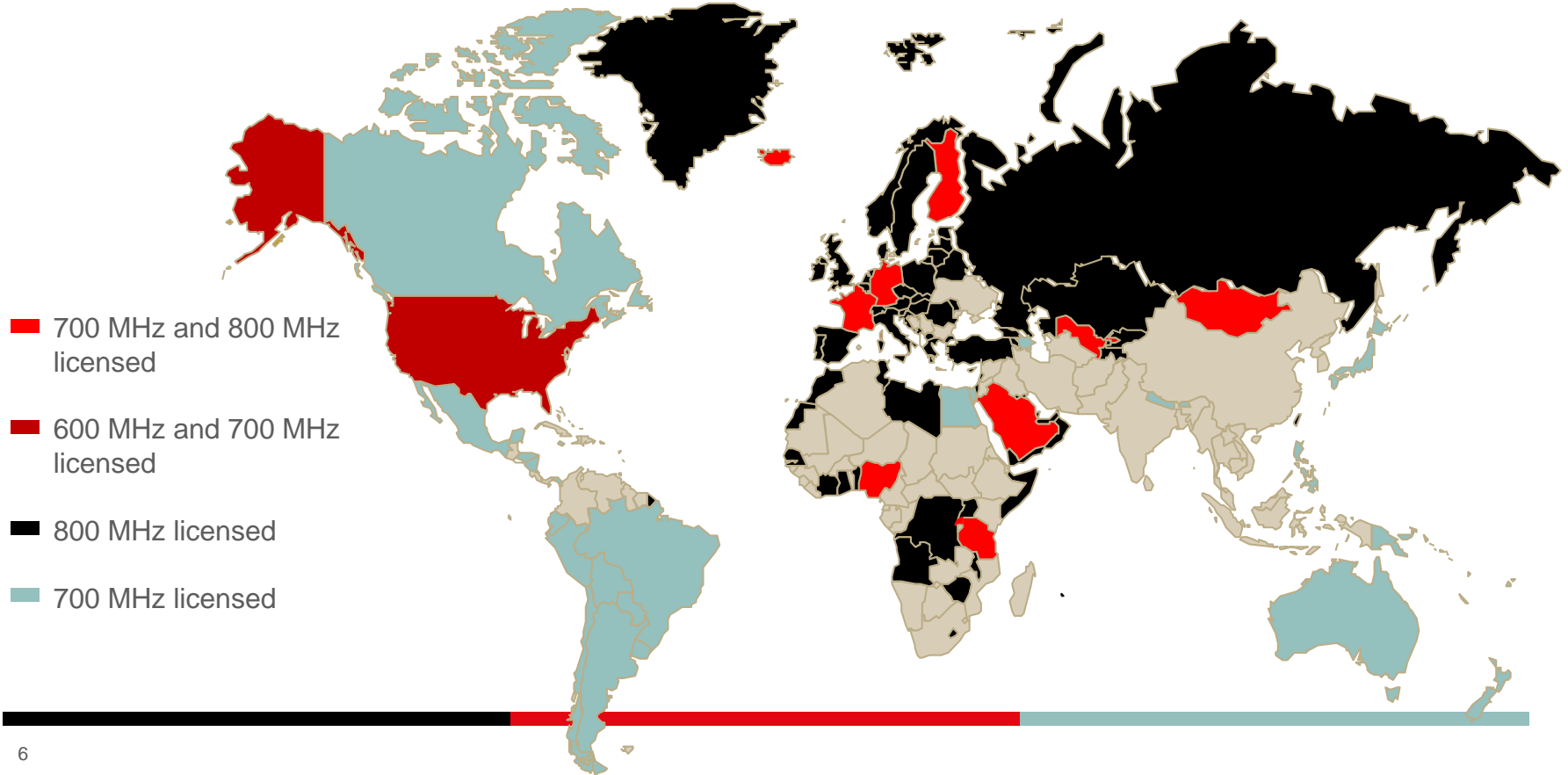


5G era goals



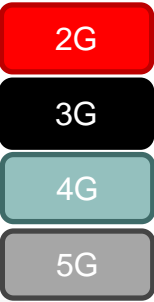


Deployments of Digital Dividend

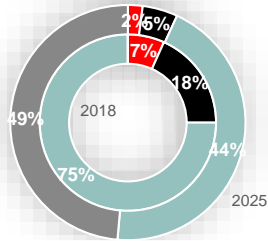




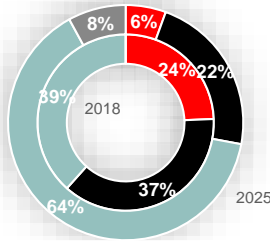
The rise of mobile broadband



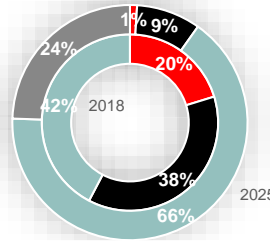
Regional connections by technology



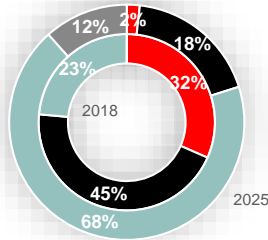
North America



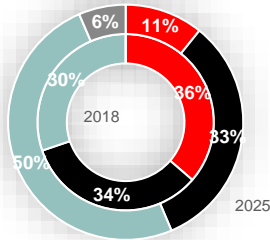
Latin America



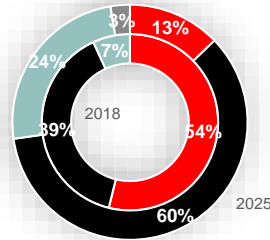
Europe



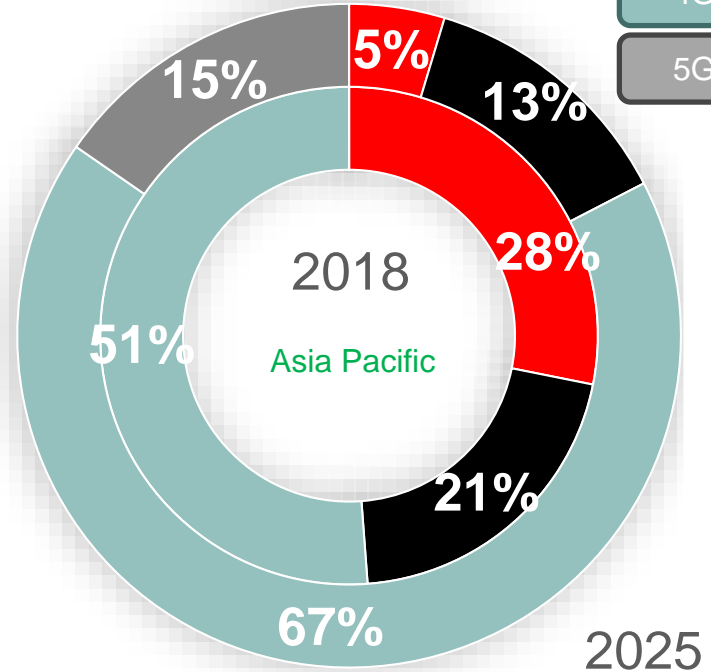
Commonwealth of Independent States



MENA



Sub-Saharan Africa



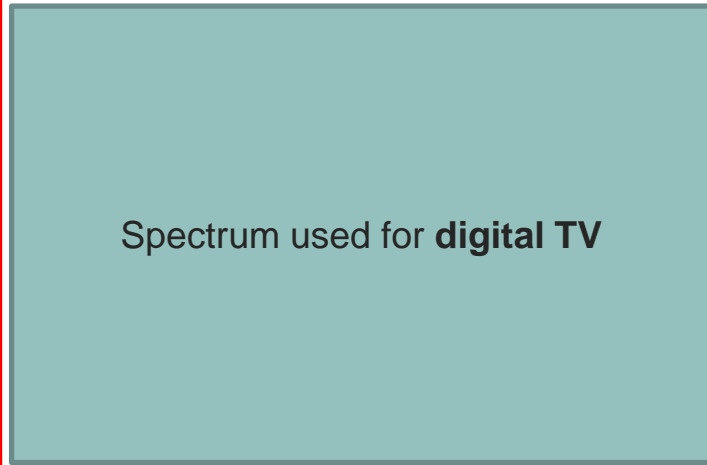
2025

Digital television & mobile broadband: a globally standardized adoption

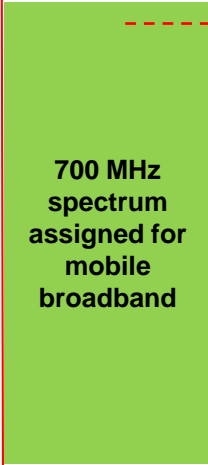


100%
population
coverage

64% of the band: Digital TV Broadcasting



Digital Dividend



Digital dividend: 700 MHz for mobile broadband, smaller portion of the band (36%)

Global practice. Europe, Americas, Africa, Oceania, Asia (i.e. China, Japan, Korea, Philippines, Thailand + others)

Significant economic and social benefits

The world has moved on from analogue TV

502 MHz

192 MHz

694 MHz

112 MHz

806 MHz

Indonesia: 100 % still in use for legacy analogue TV



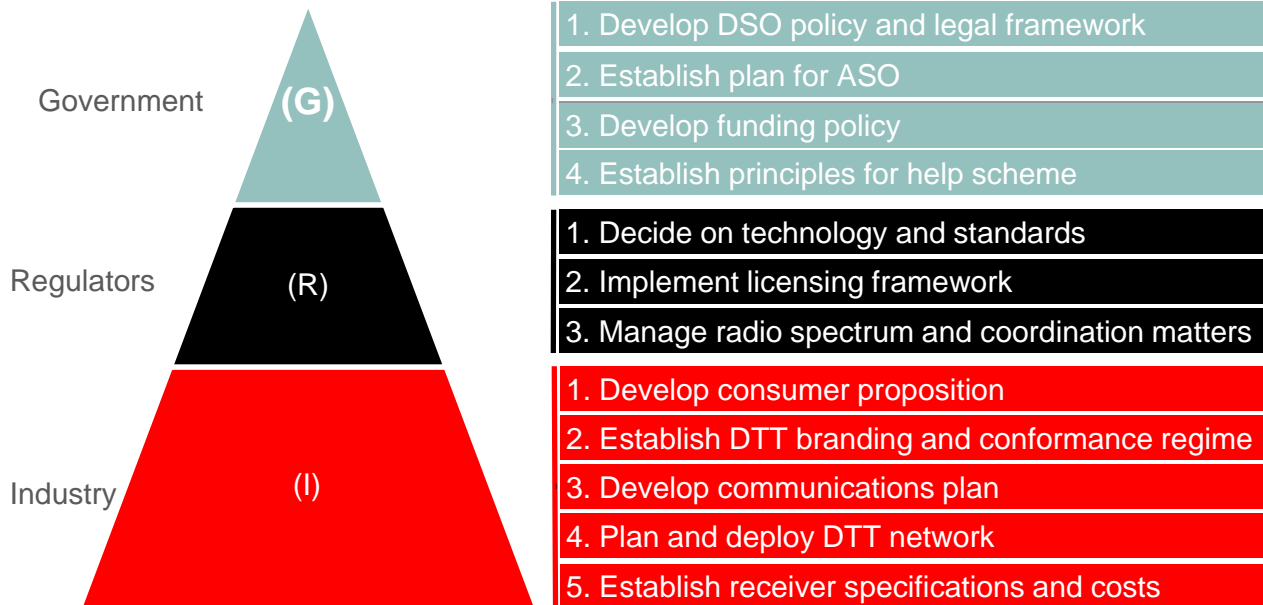
Urgent **milestones needed** for Indonesia to benefit from **digital transition** and realize the digital dividend



- 1) Broadcasting Act amendment:** sunset provision on spectrum rights used by legacy analogue TV broadcasting as soon as possible
- 2) Analogue TV switch-off date:** announcement of ASO date. Implement Digital Switch Over (DSO) plan to convert to digital TV
- 3) 700 MHz release date for mobile broadband:** announce and implement the assignment of the 700 MHz spectrum for mobile broadband (**digital dividend**)

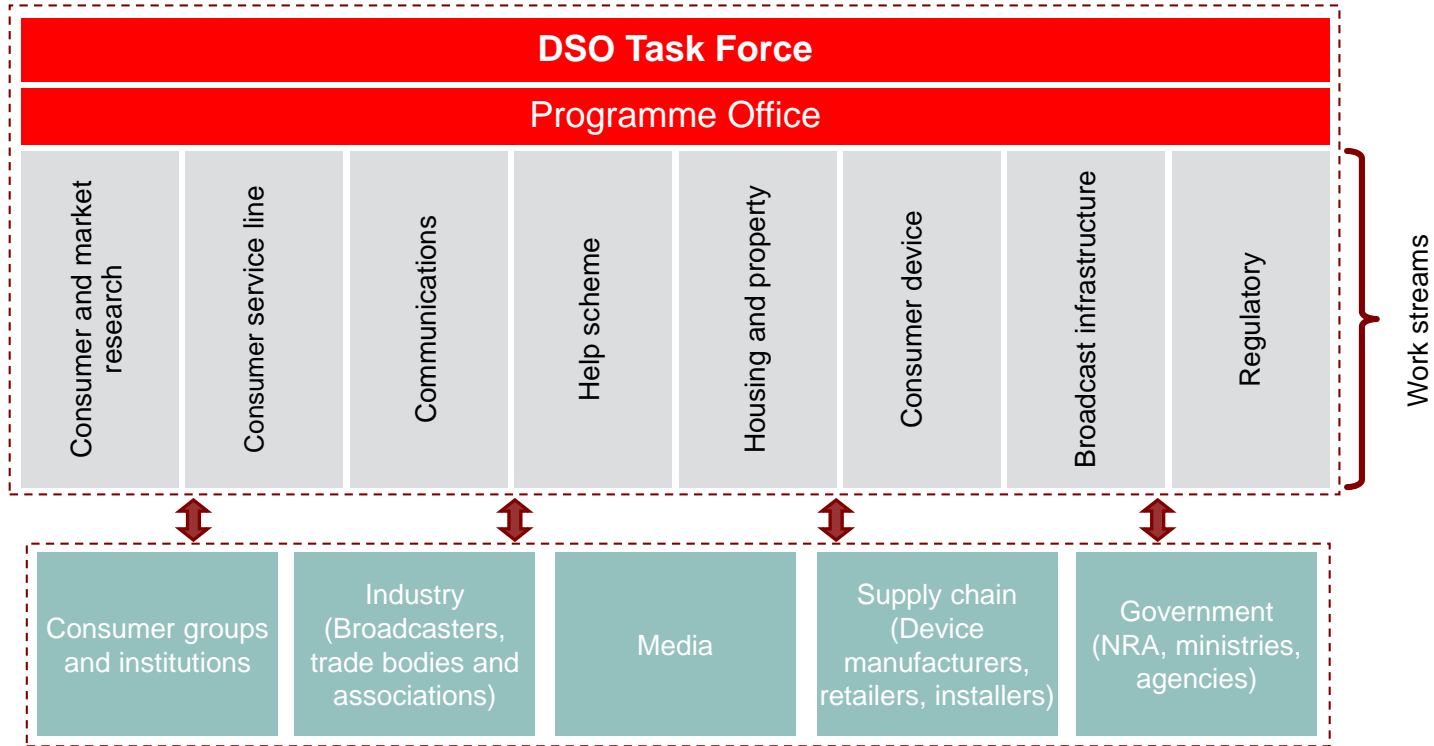


DSO challenges





DSO challenges: a national taskforce has helped in many countries





DSO: recommendations

**Step 1:
Accelerate DSO**

**Step 2: Consider
national frequency table**

**Step 3:
Engage and consult**

**Step 4: Determine
optimal allocation**

**Step 5:
Public announcements**

**Step 6: Address spectrum
management issues**





Releasing the 700 MHz digital dividend: Licensing terms and conditions

LICENCE TERMS & CONDITIONS CAN SUPPORT NETWORK EVOLUTION & INVESTMENT

License duration of 15 to 20 years

Remove service and technology restrictions

Use coverage obligations with caution and target them

Avoid restrictive and onerous conditions

Use annual fees to recoup costs – not maximise revenues

RENEWAL PROCESS SHOULD AVOID RISKING INVESTMENT & SERVICE CONTINUITY

Establish a license-renewal process inc consultation 3-4 years in advance

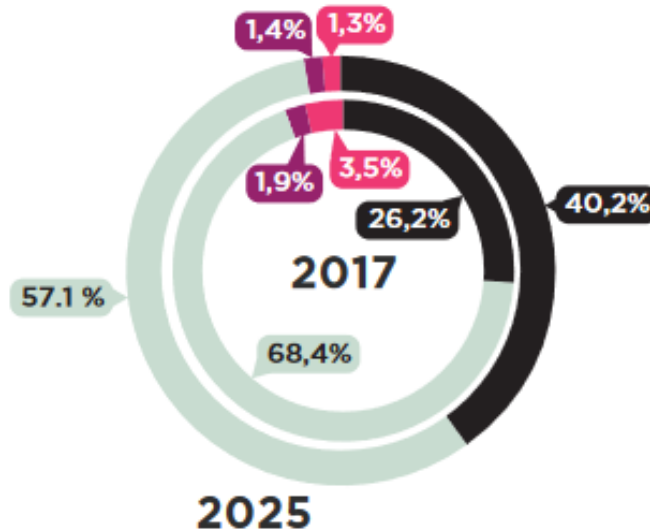
A presumption of renewal (unless terms breached) supports service continuity and investment

Renewal should be predictable and avoid introducing new terms which jeopardise RoI



The growing need of spectrum for backhaul

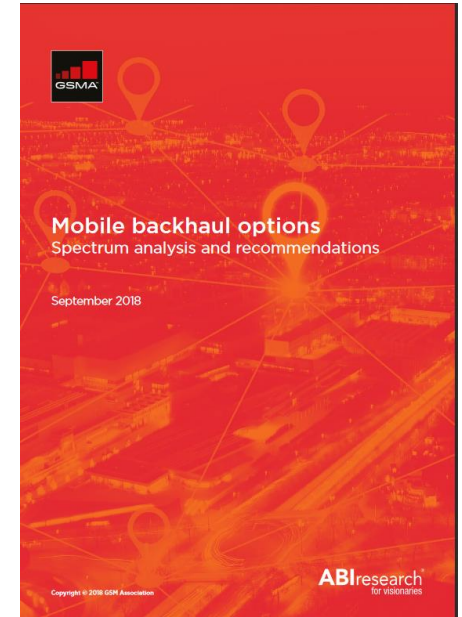
- Terrestrial wireless backhaul is the most popular backhaul method today, and will still have the largest worldwide share by 2025.



Fibre and terrestrial wireless backhaul

Will be used to connect

97.3% of all base stations





In summary, the 700 MHz digital dividend spectrum should be made available:



AT THE RIGHT TIME

The earlier the better

Use a spectrum roadmap



UNDER THE RIGHT CONDITIONS

Technology Neutrality is very important



IN SUFFICIENT QUANTITY

Capacity crush in cities will define the commercial offering of an operator



Work with the operators to understand how much is needed



AT THE RIGHT PRICE

Auctions should determine the price