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GSMA Services Showcase Live

Telco sustainability

Own house, others house, and circular effects

DATE

November 2022

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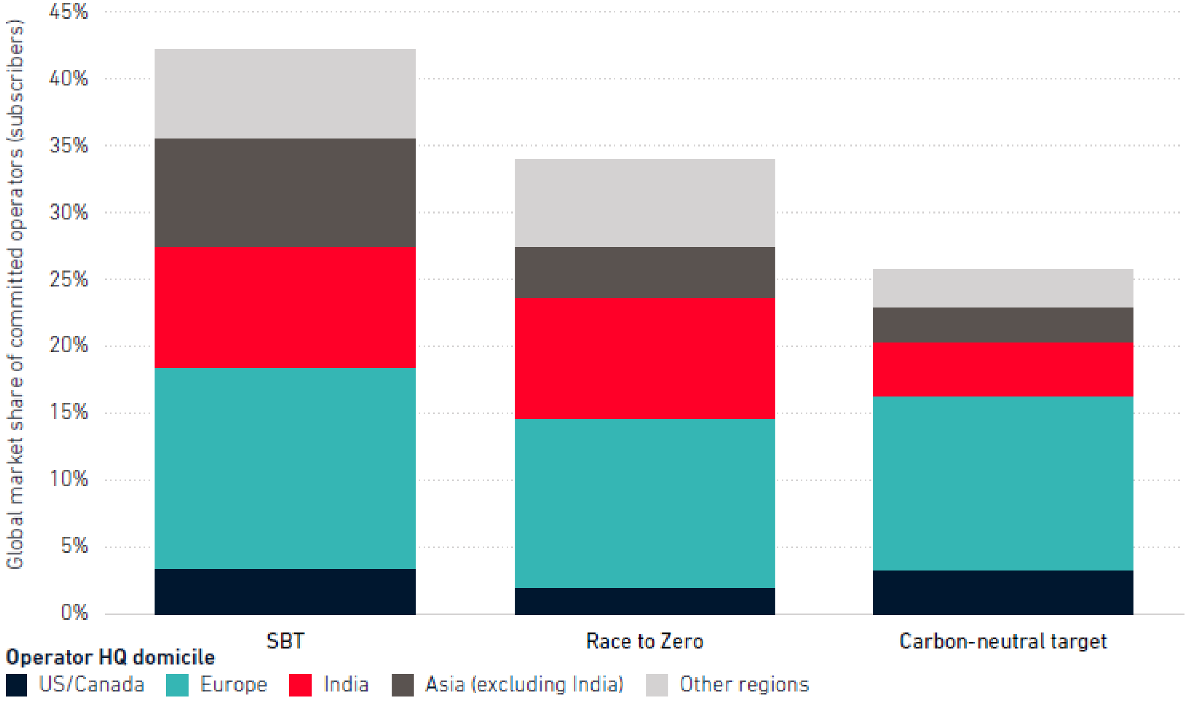
Climate change waits for no one

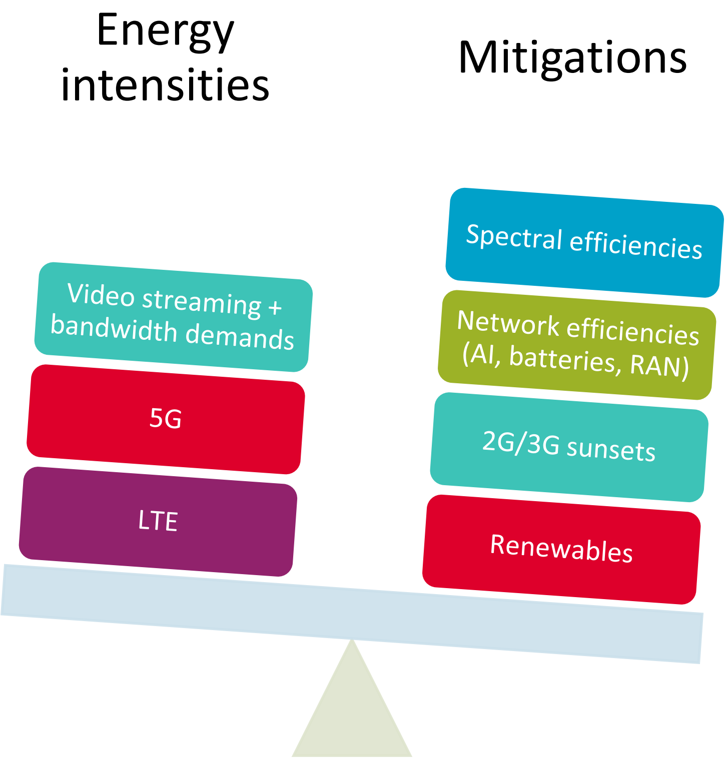
- Strategic priority, not CSR
- COP 26/27 momentum
- Globally, gaps remain to south and east

Europe has set the pace where 25-40% of the global telco sector is committed on the major climate measures



Source: GSMA Intelligence

Lowering energy for telcos is a holistic challenge



Source: GSMA Intelligence

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90% of power is from networks = low hanging fruit

Efficiency reading

- Primary ratio: kWh per unit of cellular data traffic
- Global average = 0.24 kWh per GB

- Secondary ratios
    - Energy per mobile connection = 14.8 kWh per year
    - Energy per base station site = 28,665 kWh per year

Energy sourcing

- Renewables: 46%
- Traditional grid supply: 43%
- Diesel: 11%

Network consumption

Distribution of power usage across mobile network:

- RAN = 73%
- Core = 13%
- Owned datacentres (e.g. excluding leased capacity from AWS, Azure etc) = 9%
- Other ops = 5%

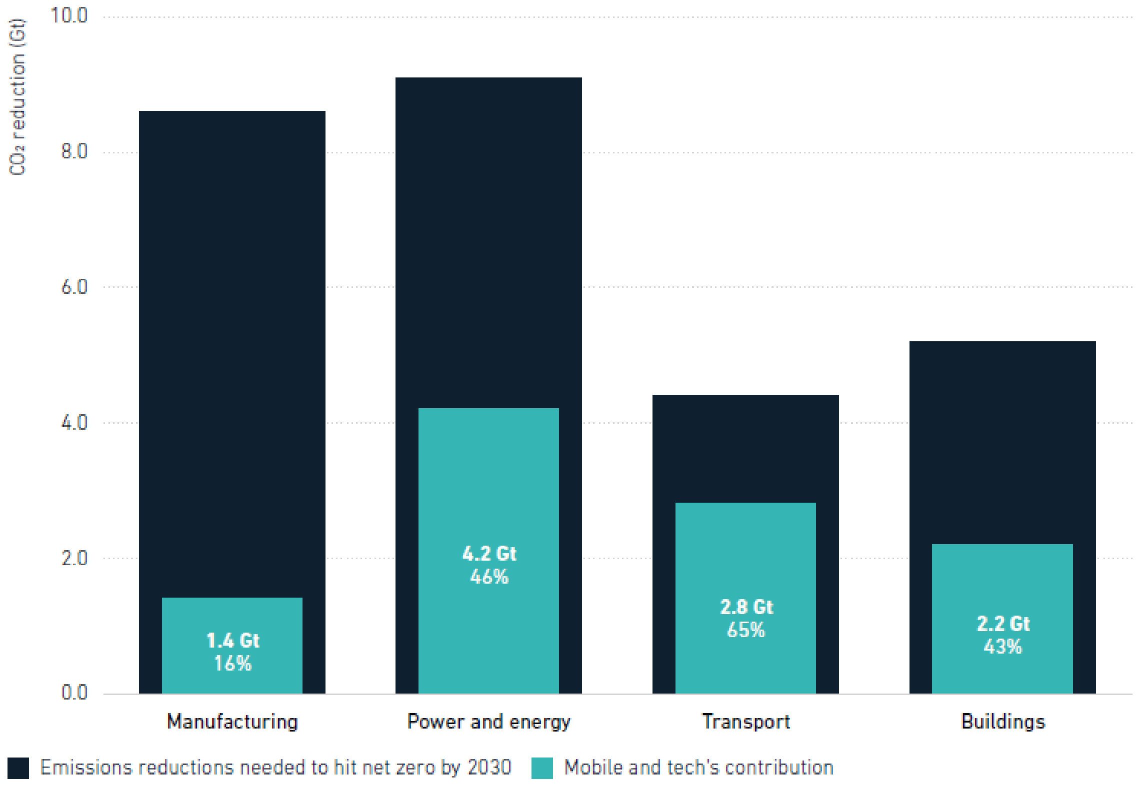
2020

*Note these figures are averages based on anonymised data inputs from 7 operator groups. Data should not be interpreted as necessarily indicative of a given company, region or overall industry as a whole. Excludes fixed line

Others house. Lower energy, higher revenues

- Beyond helping fight climate change, going green has clear direct financial benefits
    - Lower network energy costs (20-40% of opex)
    - Ease transition to renewables
    - Cloud workloads + AI
- However, less appreciated is latent incremental revenue from B2B digitisation
- Mobile + digital can enable <u>40% of CO2 reductions</u> needed by 2030 for the 4 most carbon intense industries

Mobile and digital tech can drive 40% of the required CO2 emission savings needed by 2030 to stay on track for net zero by 2050 (GLOBAL VIEW)



Source: GSMA Intelligence

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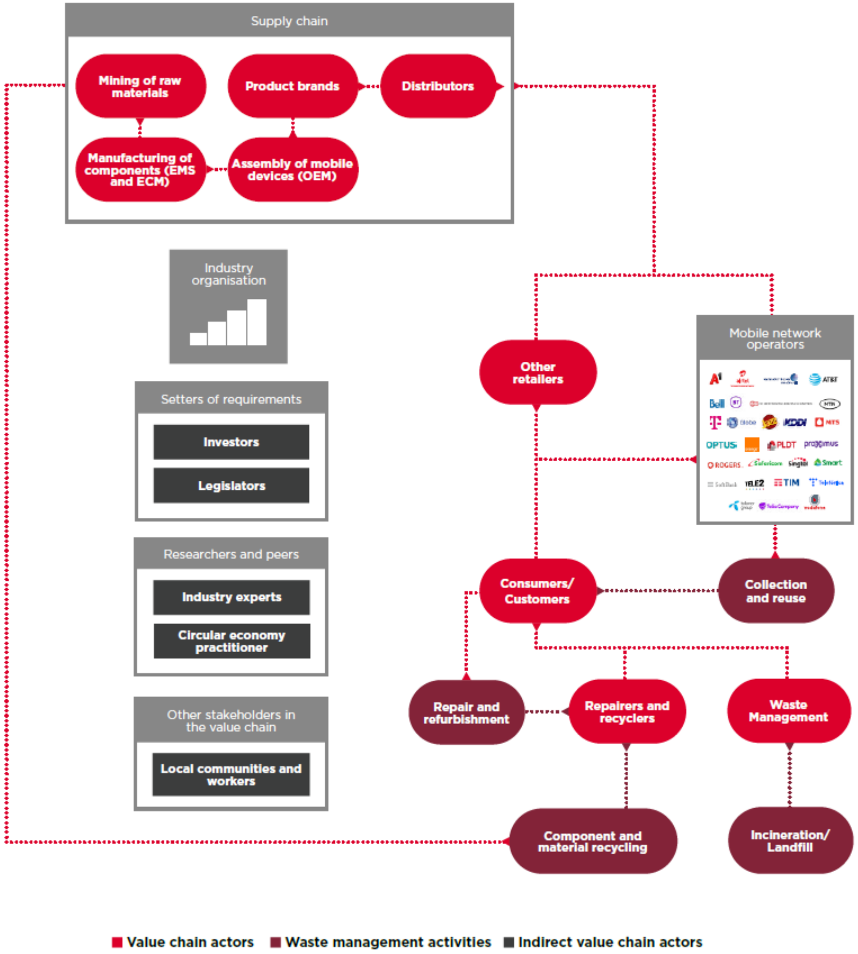
Devices have a complex value chain

Typical device value chain (may vary depending on the country)



Source: GSMA Climate Action

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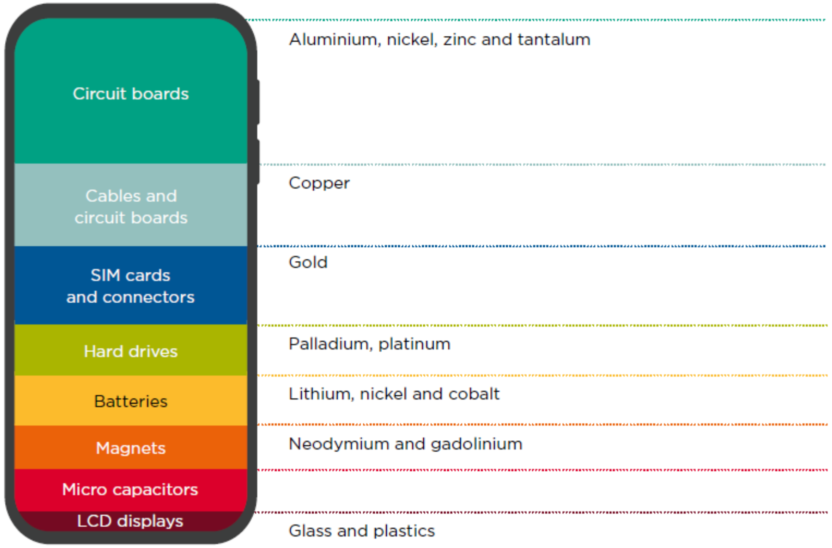
Lots of metals, but what to do with them?

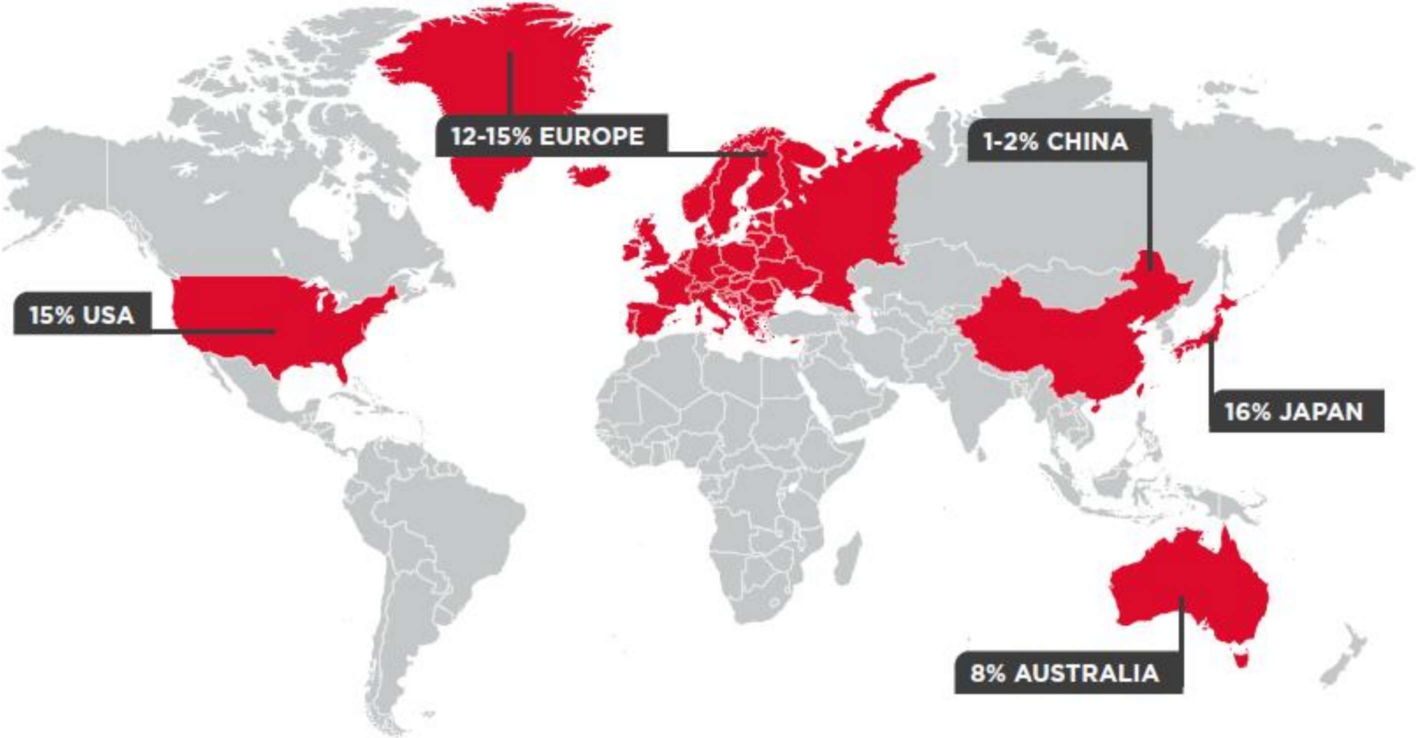
Typical mobile phone metal inclusions



Source: GSMA Climate Action

Low recycle rates augur for change

Mobile phone recycling rates (where data available)



Source: GSMA Climate Action

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Who are we? What do we know?

GSMA Intelligence Serves **800** organisations

40,000 users worldwide

Data

1,400 Mobile operators

80 Operators groups

5,000 Networks

30M Data points updated daily

Research

130+ Reports annually

1M Report downloads in 2019

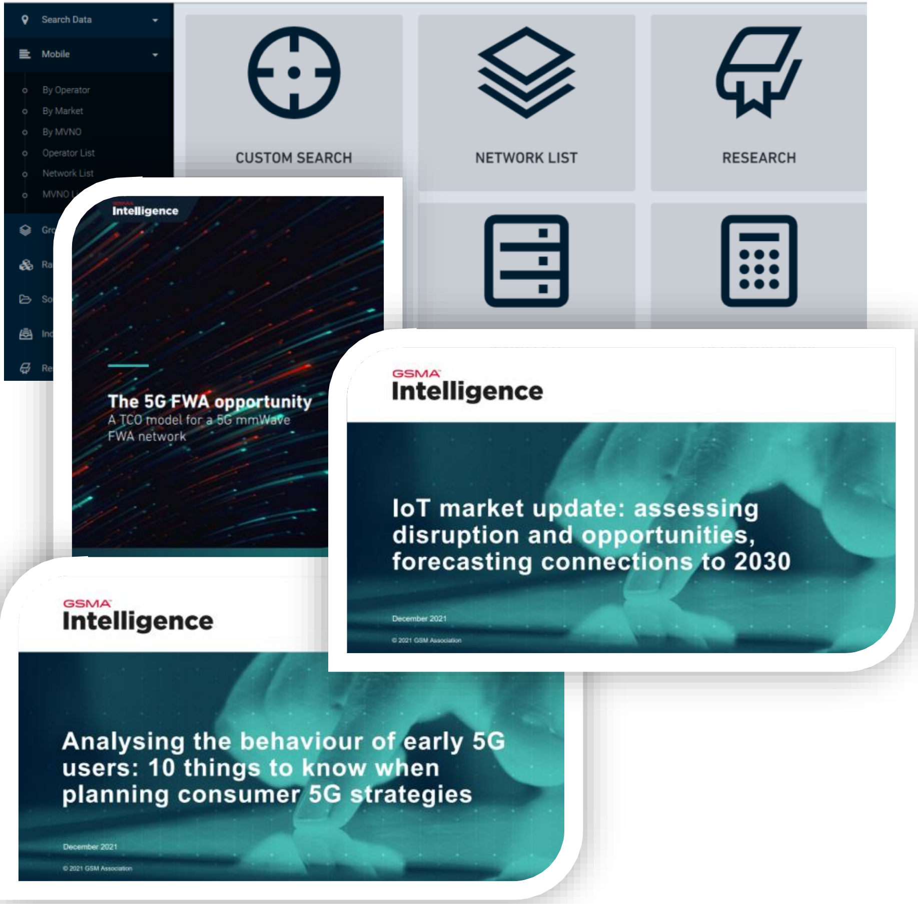
100+ Global, Regional & Topical Research, Deep Dives & Analysis

Pinpoint accuracy

Five-year forecatst consistently accurate within +/- 2.5% of reported data, updated quarterly

50+ Analysts & industry experts

Supporting the business strategy of our subscribers and the wider ecosystem



Thank you

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