



MOBILE.
WORLD CONGRESS

Barcelona | 27 February - 1 March 2012



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Spectrum – it's everybody's business

Thursday 1st March 2012



Agenda

- Welcome to the world of spectrum
- Data demand predictions
 - Dr. Robert Pepper, Cisco
- Connected living
 - Ton Brand, GSMA
- Using what we've got
 - Mike Wright, Telstra
- The spectrum ask
 - Sandra Gilligan, GSMA
- Panel Session
 - Acting now – getting everyone involved
 - Moderator: Alan Hadden, GSA



We have heard this week at MWC so much exciting news about new technologies, new devices and even new cars! As well as heaps of services and whizzy whacky applications.

I, along with my colleagues, are usually ensconced in the Fira Palace hotel – an event that you possibly don't even know co-exists alongside this amazing Mobile World Congress. We bring together nearly 200 government delegations to discuss the rules and regulations that guide us that play a crucial role in keeping the mobile industry healthy (and we hope wealthy!).

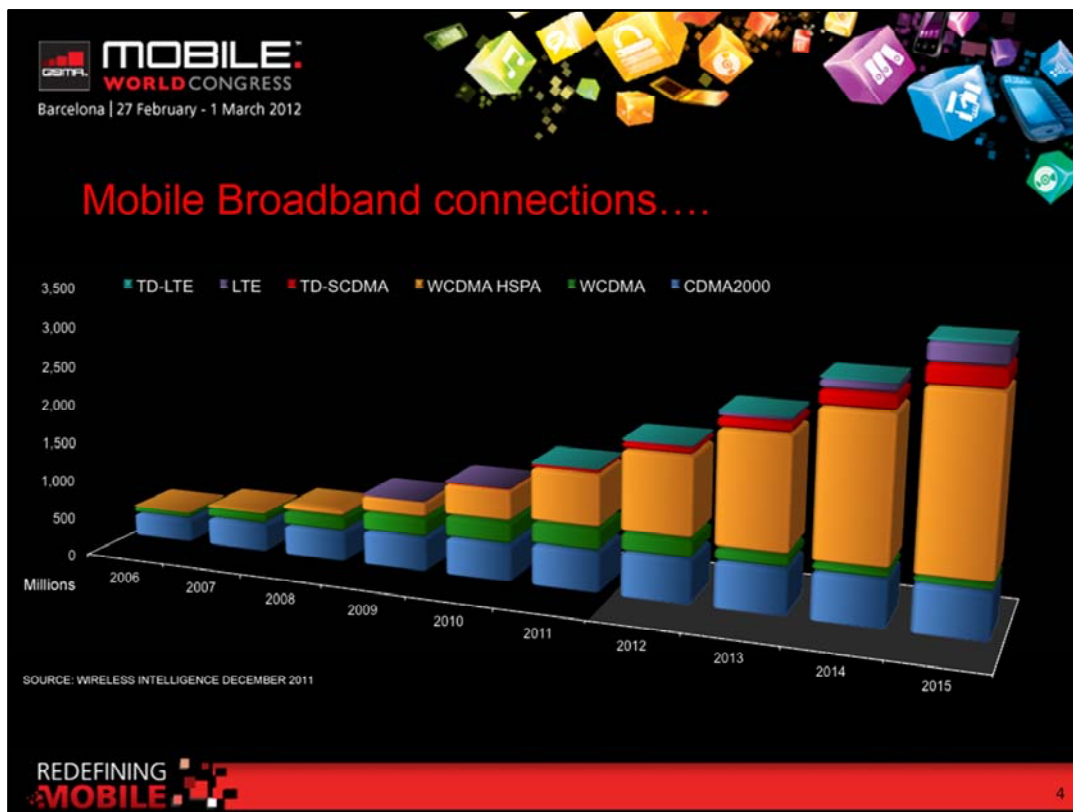
Part of our remit is to ensure we raise the profile of the need for spectrum to these administrations – it is the life blood of the mobile network and without it – we wouldn't be MOBILE!

We will hear within this seminar about the data growth and how we will use more and more, what new verticals are also relying on mobile to deliver great new concepts in health, education, transportation and the like, how we are working hard to deliver those services and to use what spectrum we have with network enhancements and better coverage and about a recent conference that works on the allocation of spectrum

but I wanted to start the ball rolling by ensuring we all understand that it is a matter for all the industry to engage and work out where we go from here. We will use more and more data even with WiFi offloading and new technology concepts we have yet to think of.

So my slide – predicting the future is a dangerous business – get it wrong and you look a little silly or worse – get it wrong and it's wrong for years, especially in the case of mobile, if we don't act now **AND TOGETHER** we may find we can't sustain our increasing mobile industry.

I'm not here to scare – just to cajole all in working together towards the future



So where are we in just the near term – mobile broadband connections alone will extend to nearly 3 billion by 2015 – and we will have many more billions still on GSM networks for years to come too.

This graph shows the whole picture in terms of mobile **broadband** connections – but does exclude WiMAX as it is too small to show with clarity – with the ITU stating that fixed line numbers are only 1.2 billion (2010) mobile has the reach and mobile broadband is extending further and quicker than anyone had imagined – around 25 million connections being added per month on HSPA networks alone according to WI.

So what are we using it all for?



Amazing Stats and Facts

- We consume:
 - 8 trillion SMS per year
 - 1 in 7 searches made on the internet are mobile
 - 320 million mobile YouTube videos are seen PER DAY
 - Average smartphone usage now at 550MB per month

A day in the life surrounded by radio waves.....surprisingly we will consume

Text messages at a rate of 8 trillion a year (2011)

Searches – mobile now accounts for one in seven internet searches

320 million Youtube videos are seen on a mobile device PER DAY! – no since this slide was created, we now know its over 600million a day on mobile devices.

Average smartphone usage is 550MB – more if you are a tablet users – likely to be much higher as downloading movies etc eat up on average 1.5GB

In fact – look at the data demand.....

Our very low industry forecast

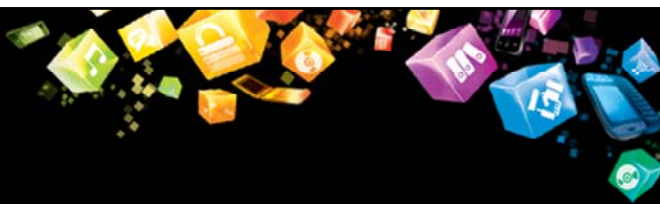


We have to always provision networks for the busy hour, ensuring that there is enough capacity in the system ready for 'the home time rush hour' or the latest news on (whether the metro in Barcelona is working again or where the militant students are protesting!) but as this graph shows, we have underestimated the real use terribly we just didn't see certain things coming and again, we may not envision what the next 'data rush' will be.....

In 2010, as an industry (working with the ITU to create this forecast) we predicted back in 2005 that we would use around 600,000 terabytes of data – what we actually saw was 4450 petabytes – let's put that into real numbers.....



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600,000,000,000,000,000

4,450,000,000,000,000,000

an underestimate of over 7 times



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And to note – the mobile industry only uses a small proportion of the frequency spectrum and yet generates huge wealth in our wider ecosystem.

I'd like to leave it there as our next speaker has more facts and stats to amaze us with on how fabulous an industry we work in

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Moderator: Alan Hadden, GSA

PANEL SESSION



I'd like to thank all our speakers and especially our audience for participating and hopefully getting an understanding of the importance the next 3-4 years will be for our industry.

We cannot afford to get it so wrong again. We need to get everyone supporting an ask of the governments for more harmonised spectrum and to do so, we need to gather as much data as possible and model it appropriately

please get in touch with GSMA and add your weight behind this important issue.