

# The 5G State of Play 2024





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## Agenda

- The mobile industry landscape
- The new Generation : 5G and its benefits
- Enabling policies for the success of 5G

# This is the GSMA


<p><b>Intelligence</b></p>  <p>Serves <b>800</b> organisations</p>	 <p><b>40,000</b> users worldwide</p>
<p><b>Data</b></p>	 <b>1,400</b> Mobile operators  <b>80</b> Operator groups  <b>5,000</b> Networks  <b>30M</b> Data points updated daily
<p><b>Research</b></p>	 <b>130+</b> Reports annually  <b>1M</b> Report downloads in 2019  <b>4 Research Areas</b> Mobile Operators & Networks, IoT & Enterprise, Digital Consumer, Fixed, TV & Convergence
 <b>Pinpoint accuracy</b> Five-year forecasts consistently accurate within +/- 2.5% of reported data, updated quarterly	 <b>40+ Analysts &amp; industry experts</b> Supporting the business strategy of our subscribers and the wider ecosystem

**THE GSMA WAS FOUNDED IN 1987**


Representing the interests of **750+** MOBILE OPERATORS

NEARLY **400** COMPANIES IN THE BROADER MOBILE ECOSYSTEM


The GSMA works to deliver a regulatory environment that creates value for consumers by engaging regularly with



MINISTRIES OF TELECOMS



TELECOMS REGULATORY AUTHORITIES




INTERNATIONAL & NON-GOVERNMENTAL ORGANISATIONS

**8.7 bn+** MOBILE CONNECTIONS WORLDWIDE

Intelligently Connecting Everyone and Everything to a #BetterFuture

The mobile industry is the first to formally commit to the UN Sustainable Development Goals



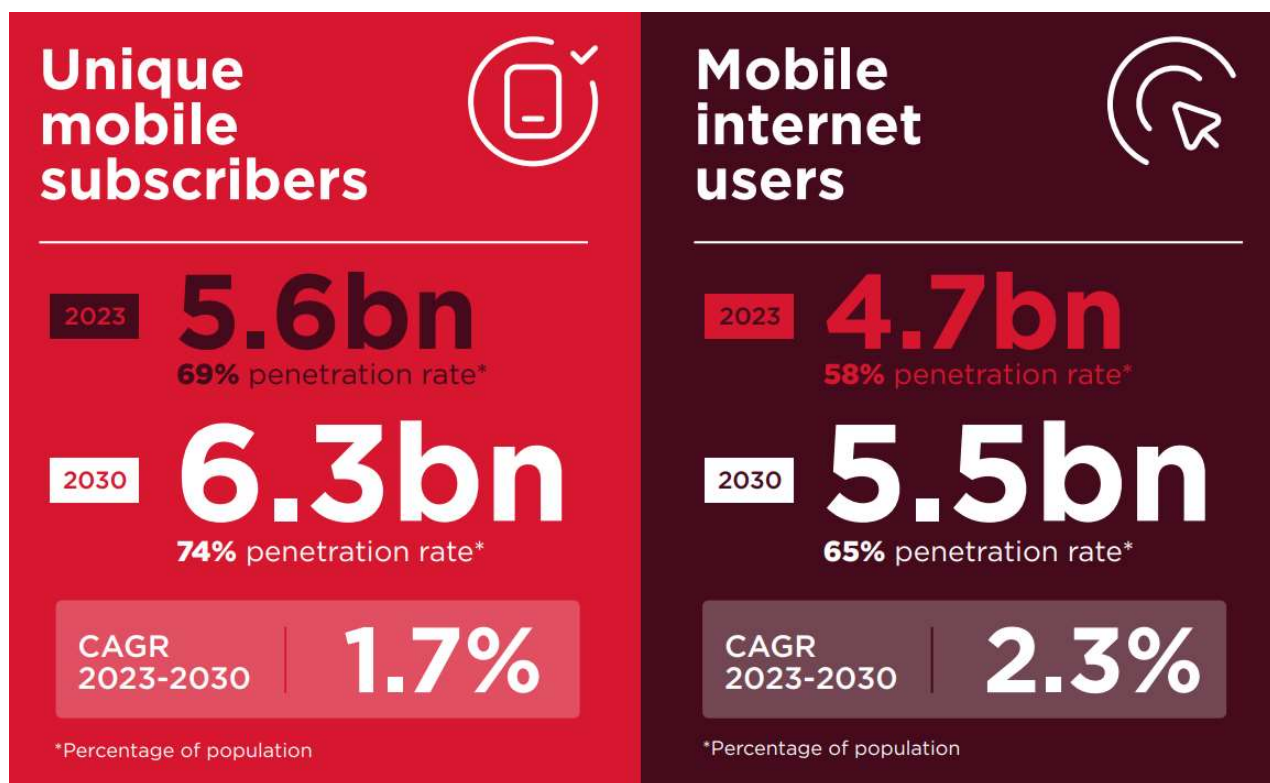
**14** Offices worldwide

Hosting the world's leading mobile industry events, MWC Barcelona, MWC Shanghai, MWC Los Angeles and the Mobile 360 Series attract **230,000** people from across the globe

**100+** TECHNICAL WORKING GROUPS  
 Promote industry best practice, harmonise operational frameworks and standards

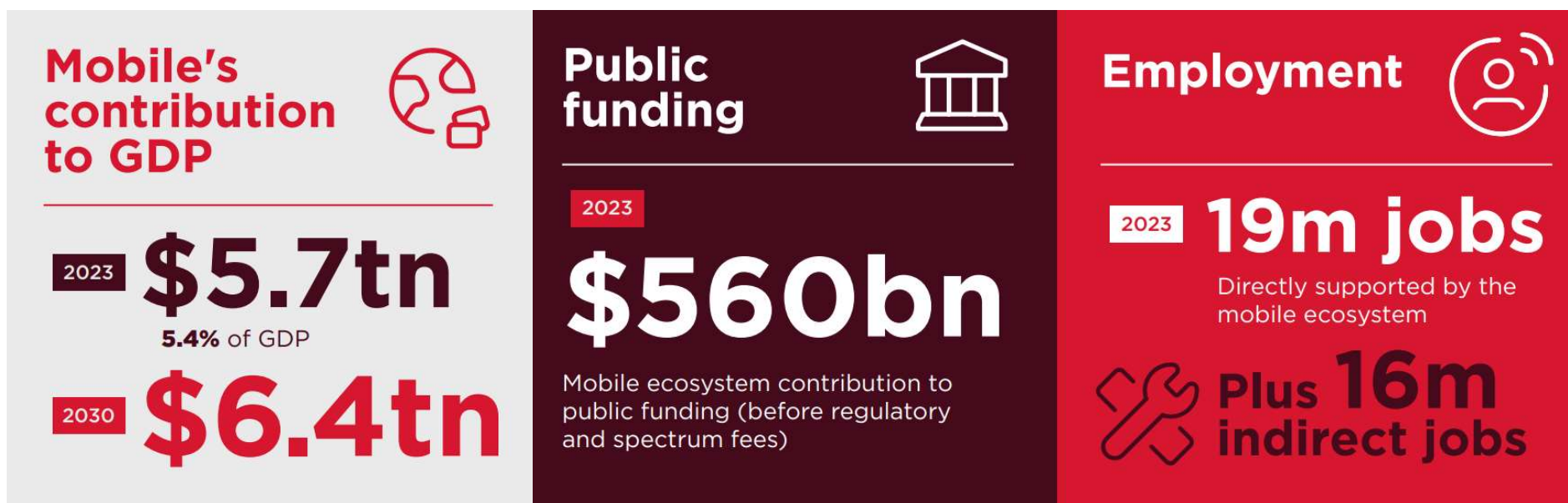
**InfoCentre<sup>2</sup>**  
 Member-only platform connects **23,000+** Industry experts

# The mobile industry in 2024 at a glance



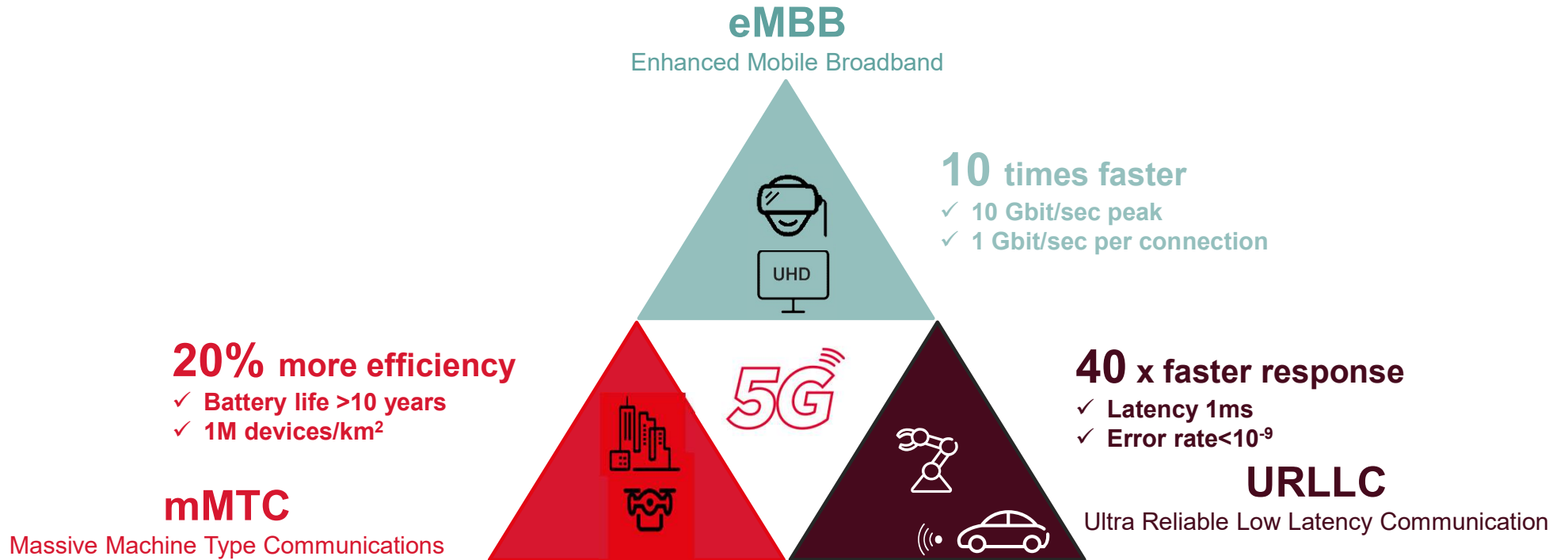
The Mobile Economy 2024

# The mobile industry in 2024 at a glance



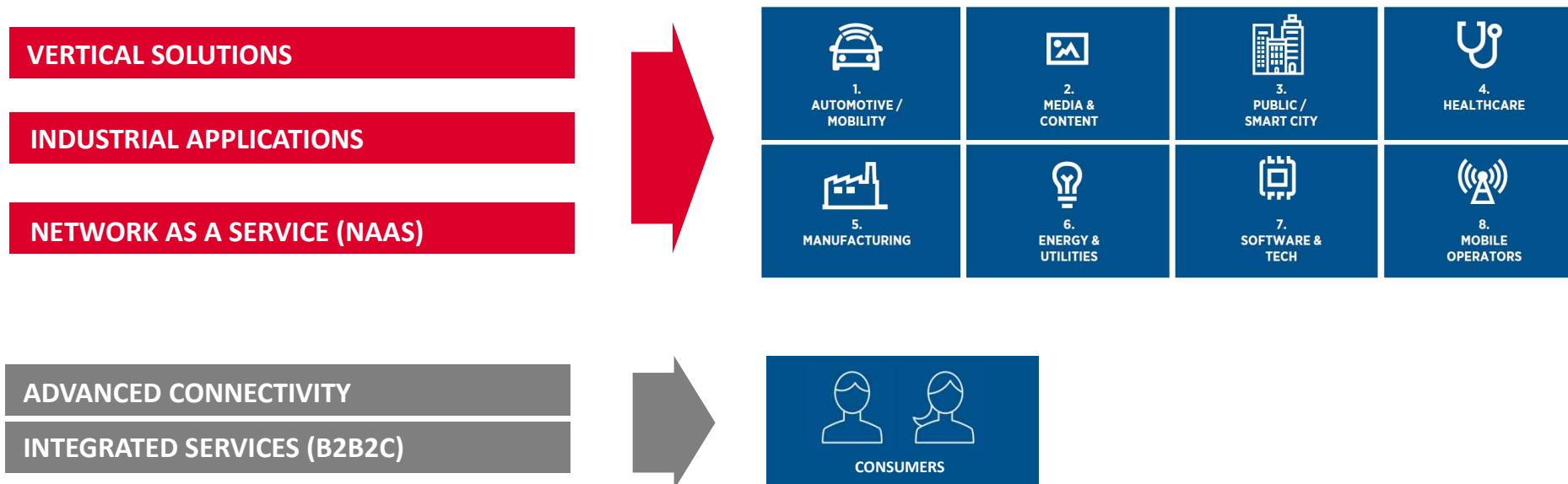
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# 5G is a three dimensional evolution...



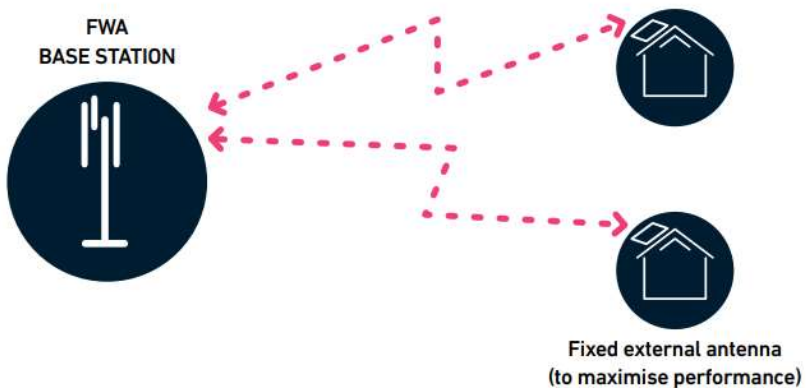
**Speed, ultra reliability and massivity are the 3 pillars of 5G**

# ...enabling a new generation of applications

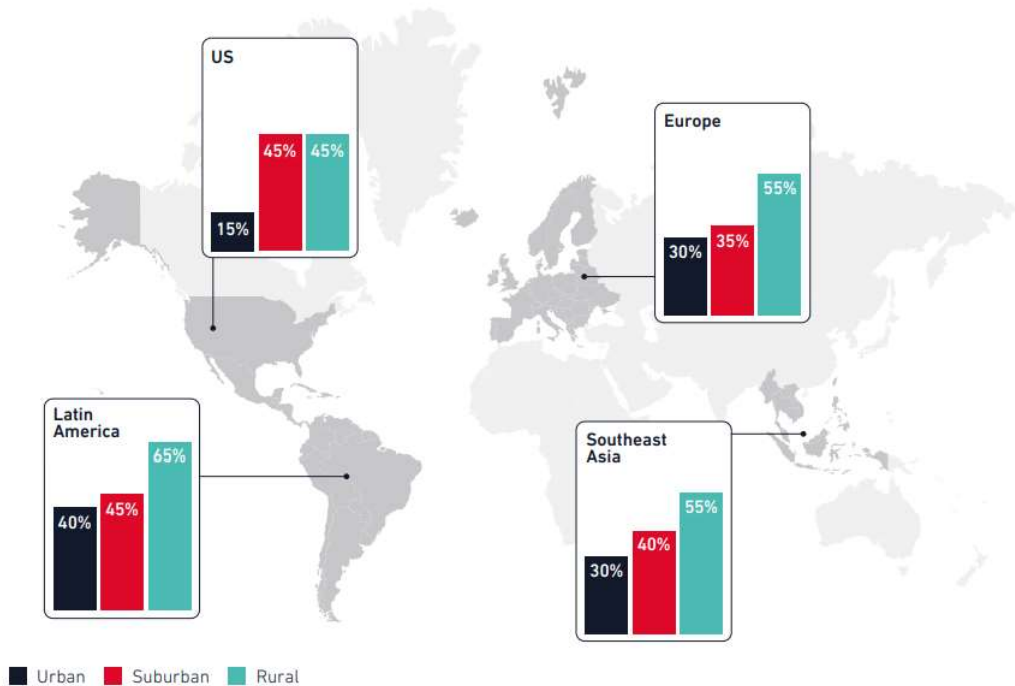


# Use case: Fixed Wireless Access

Speeds fiber-like (up to 1Gbps)

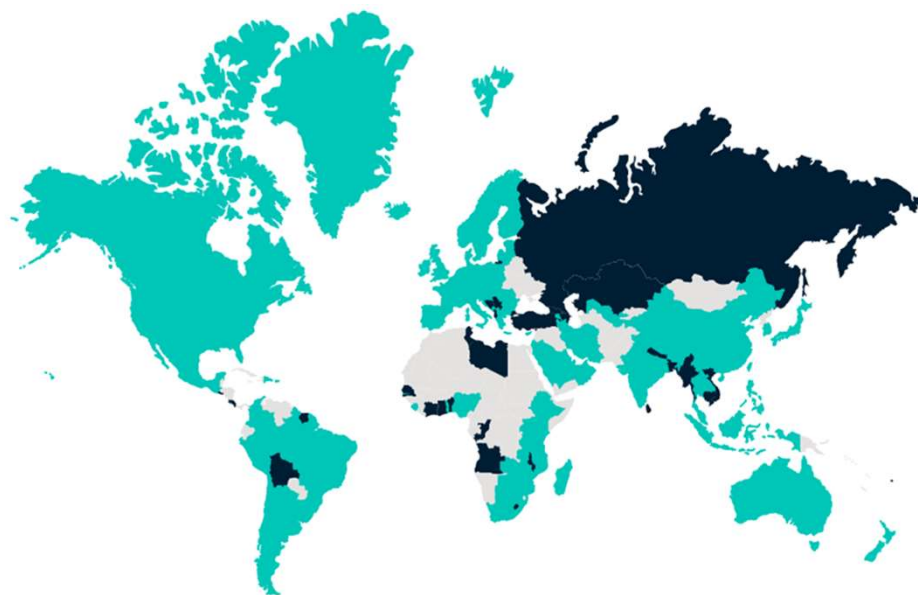


Comparative cost Vs fibre





# The 5G expansion continues in all regions



■ Live commercial 5G network ■ Planned commercial 5G network

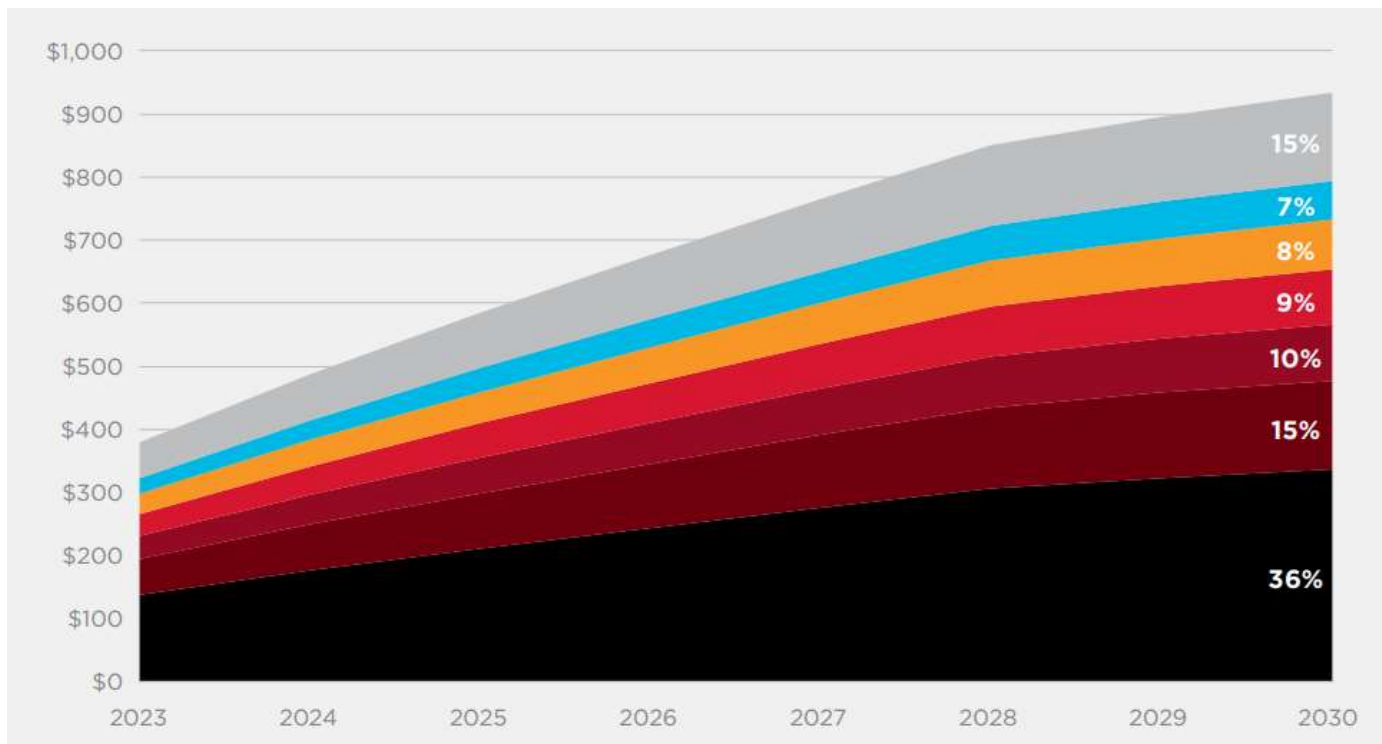
**282** launches

**109** markets

**10** countries and territories in the Caribbean Region

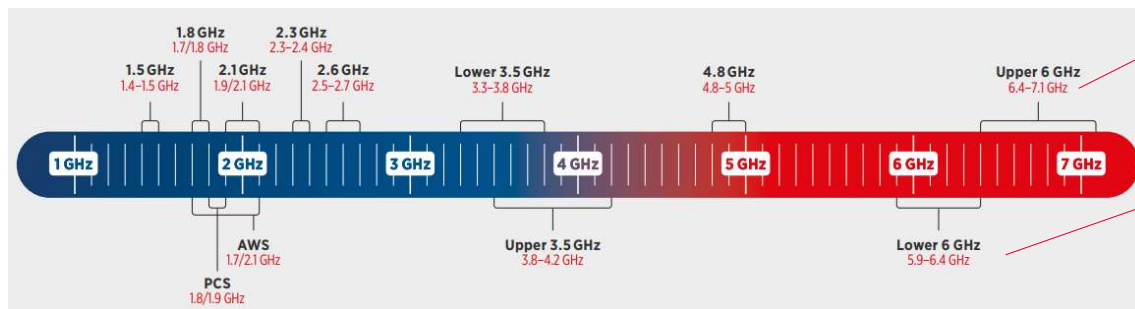


# 5G will add more than \$930 billion to the global economy by 2030



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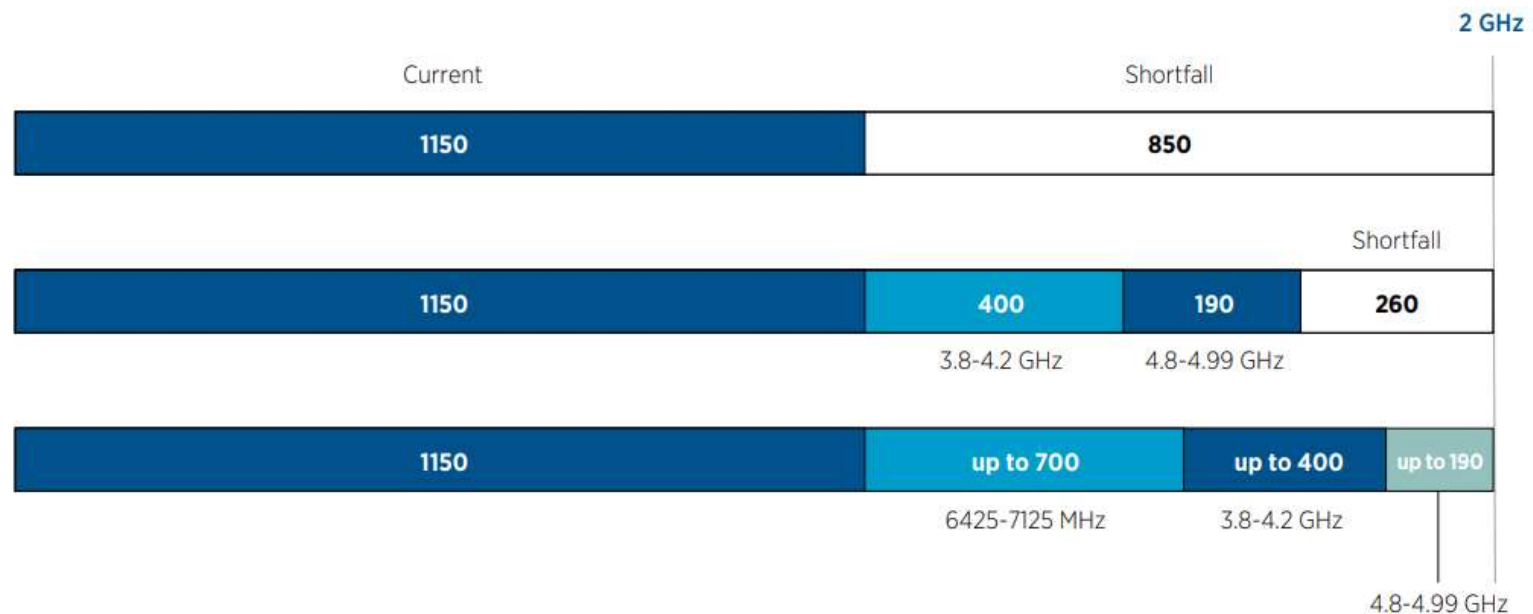
# 5G requires an additional supply of spectrum, specially in mid-bands



5925-6425 MHz unlicensed  
 6425-7125 MHz for IMT (5G NR),  
 Studies in CMR-23


Source: Socio-Economic Benefits of Mid-band Spectrum Latin America and the Caribbean (2020-2030)

# The importance of the 6GHz band for 5G

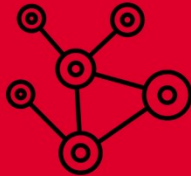


Source: Socio-Economic Benefits of Mid-band Spectrum Latin America and the Caribbean (2020-2030)

# Business sustainability is challenged by the demand for stronger infrastructure



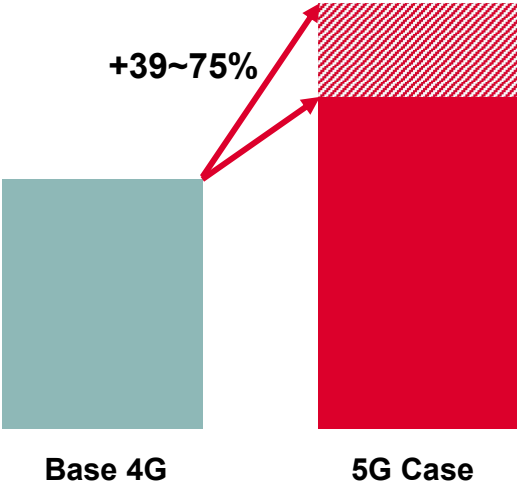
**Small cells in a range of 60-300 metres between each**



**8 x Fiber optic deployments >10 x antennas**



Total Cost of Ownership (TCO)





# Enabling policies for the success of 5G

# Challenges for a successful 5G rollout and adoption

## Initial learnings (operators)



Initial coverage

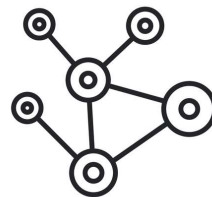


Voice compatibility



Business case

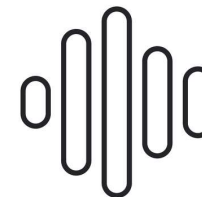
## Enabling Policies



Fiber Optic availability



Agile permission processes



Mid band spectrum

# Policies to encourage investment and innovation

**Public Policy  
planning.**

**Public/private  
sector dialogue.**

**Flexible  
regulation.**



**SIMPLIFY  
REGULATION**  
For infrastructure  
deployment



**FLEXIBILIZE  
REGULATION**  
To foster innovation



**LOWER  
DEPLOYMENT COSTS**  
For faster network  
coverage



**SUPPLY OF 5G  
SPECTRUM**  
Armonized and  
affordable



# Policy recommendations for effective spectrum pricing



Set modest reserve prices and annual fees, and rely on the market to set prices



License spectrum as soon as it is needed, and avoid artificial spectrum scarcity



Avoid measures which increase risks for operators



Publish long-term spectrum award plans that prioritise welfare benefits over state revenues.

Thank you!

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