

Global mobile
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Association

MEETING OF THE
CARIBBEAN SPECTRUM MANAGEMENT TASK FORCE

4G and 5G in Latin America

Jose Ayala
Chair GSA Spectrum Team CITELE Region

May 16, 2024

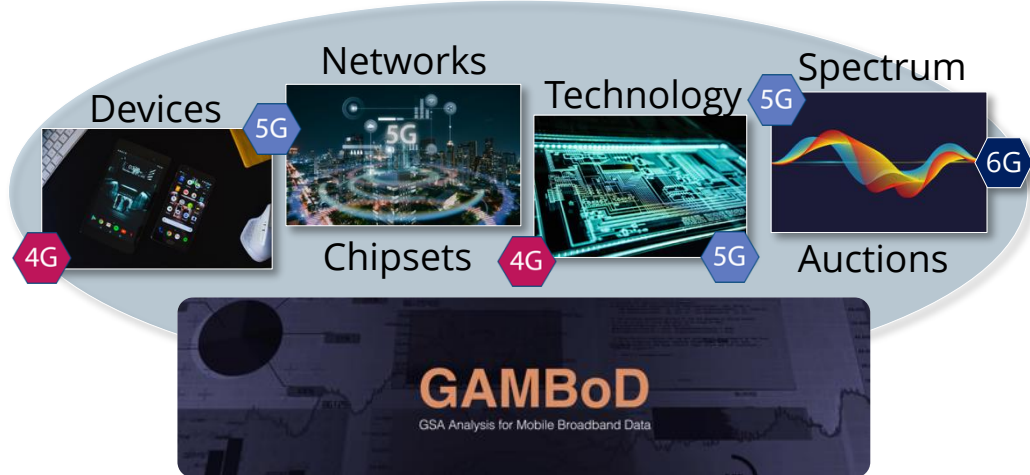


About GSA

- Representing the global mobile ecosystem since 1998
- 9 Major Industry Executives



- Extensive research & database
 - Free industry reports
 - Member reports & GAMBoD Access
- GSA Spectrum Group
 - 185+ participants regionally grouped
- GSA Standards Group
 - 6G-Joint Working Group
- Focused Working Groups & Forums
- 87 Associates subscribing to GSA data
 - Regulators-Analysts-Operators etc.



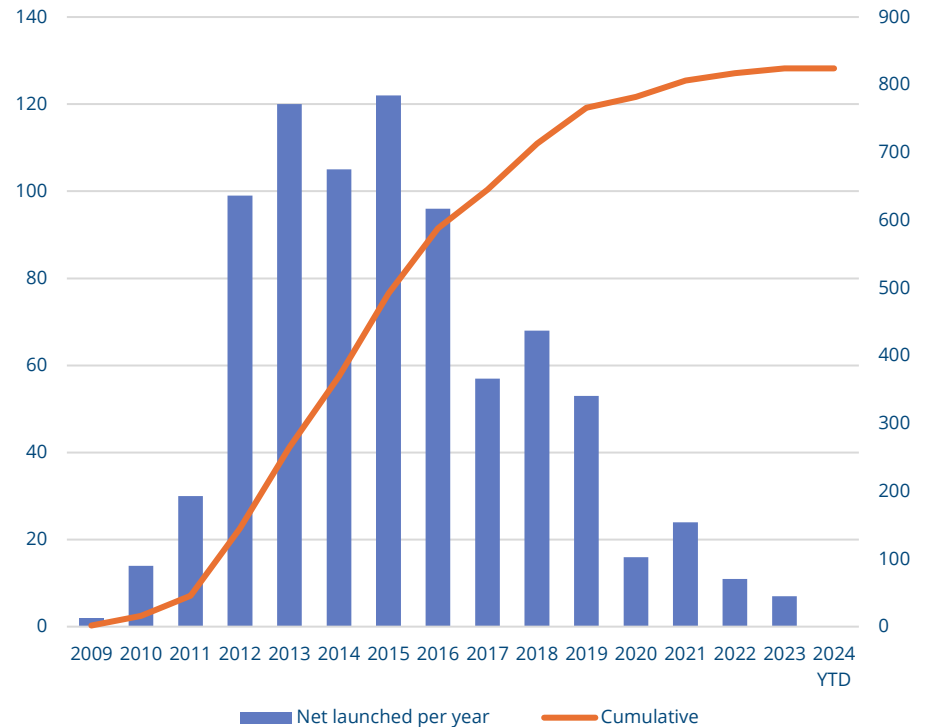
Introduction

- This presentation includes data from several of the GSA's latest reports, with data relevant up to end-February 2024.
- We will look at a current snapshot of LATAM specifically.
- Covering LTE & 5G networks, Private Networks, spectrum allocations and 2G/3G Switch-off.s

LTE has peaked in Latin America

- As of end-February 2024, 121 operators in 30 countries are investing in LTE.
- Of these, 101 operators in 30 countries have launched LTE technologies.
- 15 operators in nine countries are currently deploying LTE.
- Five operators in five countries are currently planning deployments.

Number of operators launching LTE networks per year (cumulative)



LTE-Advanced is Well Established

- As of end-February 2024, 53 operators in 25 countries were investing in LTE-Advanced or LTE Pro.
- Of these, 46 operators in 24 countries have launched LTE-Advanced technologies.
- Four operators in four countries are deploying the technology.
- A further four operators in four countries are planning deployments.

LTE-Advanced status by country in Latin America and the Caribbean

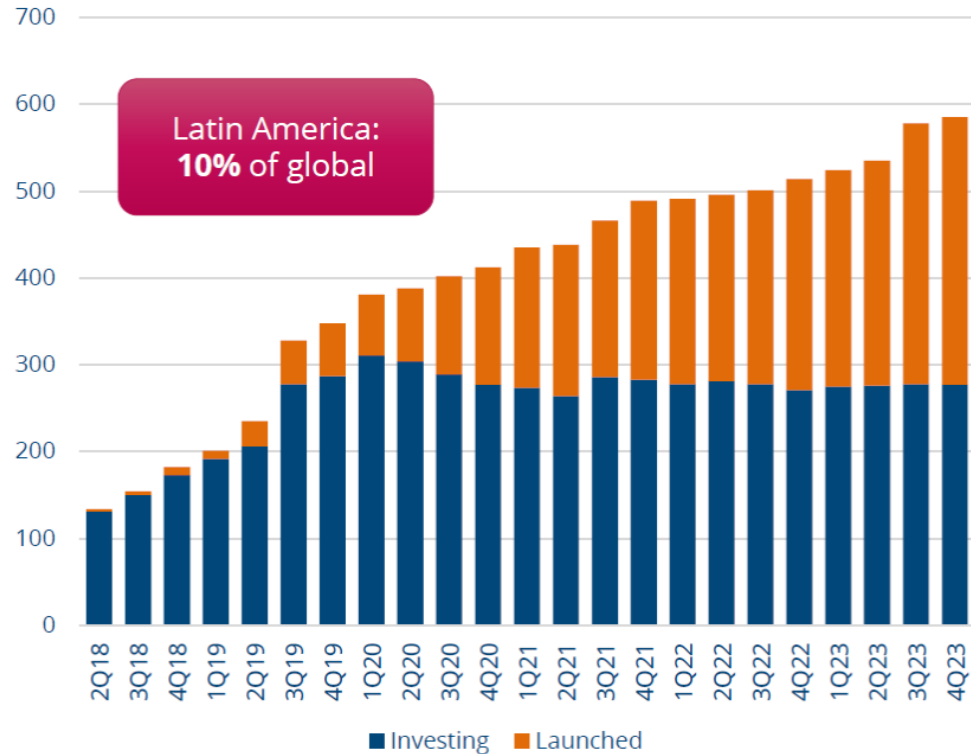


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5G in Latin America

- As of end of February 2024, 64 operators in 22 countries were investing in 5G.
 - Latin America accounted for 10% of global 5G investments
- Of these, 26 operators in 13 countries have launched 5G services.
 - Latin America accounted for 8% of global 5G launches
- A further 11 operators in 10 countries are deploying 5G.
- Six operators in five countries are planning deployments.

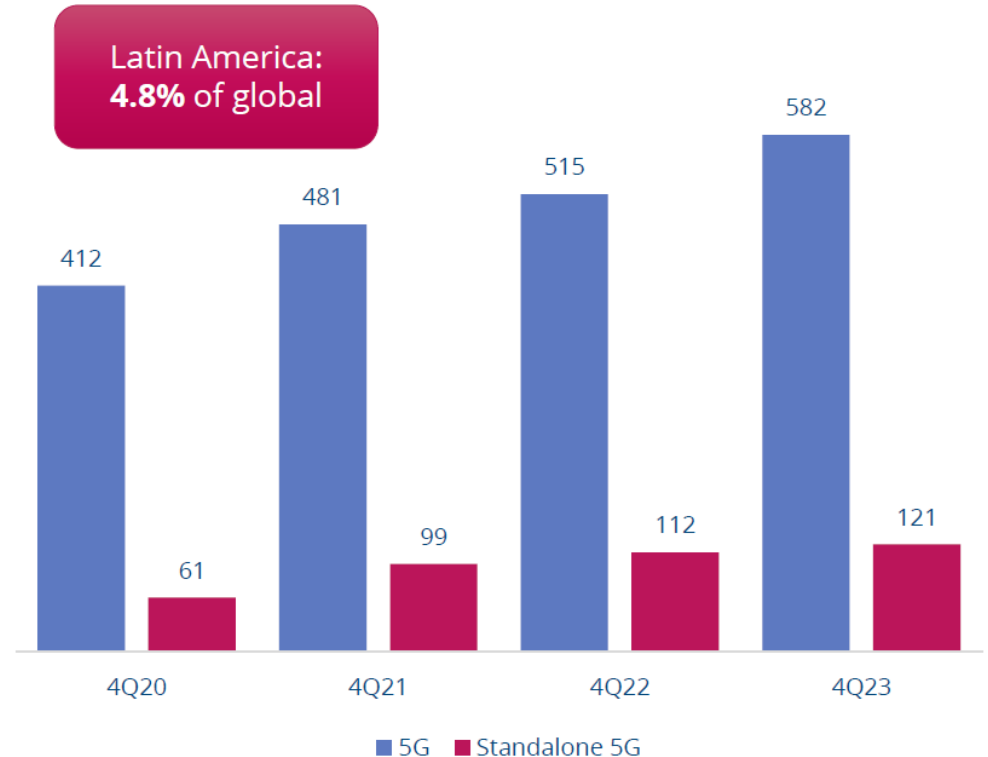
Number of operators investing in and launched 5G networks globally



5G Standalone Progressing?

- As of end-February 2024, six operators in 3 countries are investing in 5G Standalone.
- Of these, five operators in three countries have launched Standalone technology.
- Currently one operator is Piloting the technology in Colombia.

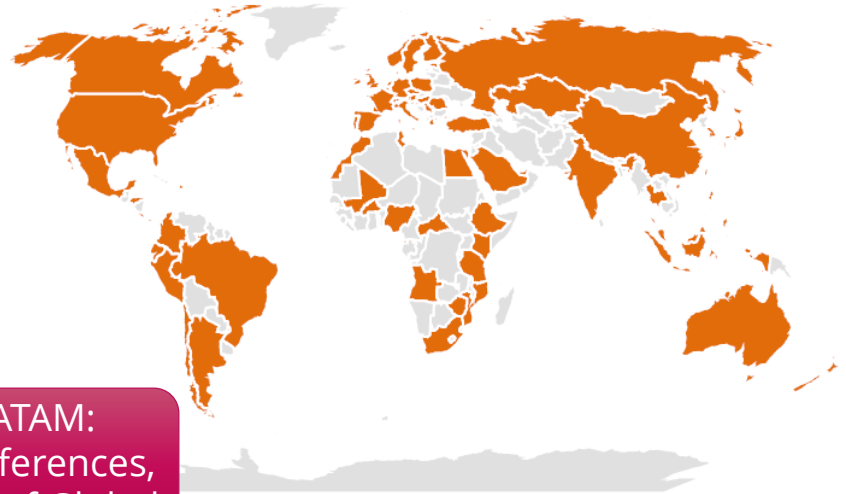
Operators investing in standalone 5G and those investing in any 5G network



Private Mobile Networks: Traction is Global

- Over 50 vendors are involved in the supply of equipment for private mobile networks.
 - Commercial availability of pre-integrated solutions continues to increase
 - More than 66 mobile operators
 - Cloud providers or "hyperscalers" are offering private mobile networks solutions
- GSA has catalogued **1,384** customers deploying private mobile networks
 - 438 named and 946 anonymised across 77 countries

Countries and territories with organisations investing in private mobile networks (pilot projects, deployments and launches)



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Mining is top sector for Private Networks

- Mining is the strongest industry in Latin America, with 30 customer deployments.
- Manufacturing is also a key sector, with 19 customer deployments.
 - A larger number of manufacturing process than manufacturing discrete.
 - The sub-category is dominated by Beverages and Tobacco products across Latin America.
- Oil & Gas, Seaports and Power Utilities round up the top 5.

Private mobile networks customer deployments by sector (base: 87 catalogued customers in Latin America)



2022 and 2023 Were Strong Years for Spectrum Allocation

- Since the beginning of 2022, six spectrum auctions and allocations have taken place across Latin America.
 - 6 countries, including; Argentina, French Guiana, Guatemala, Saint Barthelemy, Saint Martin and Uruguay
- Ranging from 700MHz to 3.5GHz, the price of assignments has varied greatly.
 - Argentina's 3.5 GHz auction received the highest price, totalling over \$870 million. The 700MHz auction in French Guiana reached over \$3.9 million
- We are expecting new and rearranged auctions in 2024.
 - These auctions will range from 700MHz in El Salvador and the Dominican Republic to 26GHz in Brazil

2G and 3G: Slowly Switching Off

- Globally 119 operators in 58 countries have completed, in progress or planned 2G and 3G switch-offs.
- Latin America accounts for six switch-offs in four countries.
- Of these, four operators in three countries have completed switch-offs: Argentina, the Cayman Islands and Colombia.
- Entel and Movistar have planned switch-offs in Chile.

2G and 3G Switch-offs by status in Latin America (end-February 2024)



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GSA REGIONAL SPOTLIGHT WEBINAR

March 21, 2024 — 4:00pm GMT

Webinar on Demand

<https://gsacom.com/webinar/regional-focus-5g-in-latam/>

Paper

<https://gsacom.com/paper/region-spotlight-latin-america-april-2024/>

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The Industry Voice of the Global
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[Https://gsacom.com](https://gsacom.com)

info@gsacom.com

