



Annual Report 2008 and Directions for 2009

Global mobile broadband/LTE: the next big success story



It's now twelve years since the UMTS Forum embarked on its mission to foster a thriving regulatory, technical and commercial environment for 3rd Generation mobile WCDMA to flourish. More than a decade later, the success of this mission is documented by over a third of a billion subscriptions to 3G/WCDMA networks, supported by a choice of over a thousand terminal devices.

In little over a decade, 3G has become a fact of life for users in well over 100 countries. And what's equally significant is the rapid uptake in HSPA subscriptions, numbering well over 85 million at the start of 2009. The next step on the road to true mobile broadband, HSPA's immediate success is seen in the proliferation of USB devices for nomadic laptop users who can benefit from generous flat-rate access bundles. Operators are also seeing revenues strengthen from value-added service offerings that range from music, video and entertainment portals to social networks.

The HSPA phenomenon is an impressive one: yet the global thirst for mobile data has hardly begun. It's clear that tomorrow's mobile marketplace will be characterised by bandwidth-hungry, real-time services that already predominate in the fixed world. Messaging, blogging, gaming, P2P and social networking applications will be transformed on mobile by real-time video, GPS and Push-to-X functionality. Services will become more personalised, immediate and 'me-centric'. The design of portable media players will change when there's no longer any need to store Gigabytes' worth of pictures, videos and music locally on your device. Business users, too, will see their workflow transformed by next-generation mobile broadband. The extremely low latency, high symmetric speed and low transport costs of tomorrow's networks will be suited ideally to real-time videoconferencing and telepresence. Working on the move will become a seamless extension of your office workspace, with near-instant to big files and corporate resources.

For the operators of more than 250 WCDMA/HSPA networks their eventual destination that promises a richer, more immersive service environment is undoubtedly 3G LTE (Long Term Evolution).

Based on an all-IP core plus a new radio interface based on OFDM, LTE promises downlink peak data rates up to 300 Mbps with increased spectral efficiency and more capacity for simultaneous users in the same cell. Offering exceptional flexibility in the use of operators' current and future spectrum assets, LTE is equally at home in paired or unpaired spectrum. And while its full potential will be realised in bandwidths of up to 20MHz, it's also quite feasible to deploy LTE in far smaller tranches of just a few Megahertz.

The check-list of attractions doesn't stop there. LTE's low latency and ground-up support for packet services will take the mobile experience far closer to the look-and-feel of fixed access networks. What's more, more flexible service provisioning for operators will be complemented by simpler interworking with fixed networks.

From a carrier's point of view, the economics of LTE are compelling. Manufacturers are offering a cost-effective route for 3G operators to migrate their radio networks to LTE by reusing parts of their existing infrastructure. Underpinning these technical arguments are simple considerations of size. With a global GSM/UMTS footprint in excess of 3.5 billion customers, subscribers already benefit directly from incredible economies of scale manifested as

affordable tariffs and a dazzling range of terminals at all price points from a few dollars upwards. And as we learned at the second NGMN Industry Conference in June 2008, technical trials by the NGMN Alliance have confirmed 3GPP LTE/SAE as the first system that comes closest to meeting NGMN's stated goals. On this occasion we were also delighted to sign a co-operation agreement with NGMN Alliance: this aims to support successful development and commercialisation of next-generation mobile broadband systems beyond 3G/HSPA (High Speed Packet Access).

In parallel with this, the last few months of 2008 saw a number of significant announcements from major CDMA operators in the US and Asia. Verizon, KDDI, KTF, SKT were among those confirming that they will converge with the 3GPP world, selecting LTE over other radio access methods to deliver high-speed mobile broadband to their customers. In China, meanwhile, existing TD-SCDMA operations also give a smooth convergent path to TD-LTE. All round the world, industry momentum behind LTE is impossible to ignore.

The journey to LTE will be a smooth, organic process via HSPA+, the next step in the Third Generation Partnership Project's (3GPP) ongoing standardisation process that fine-tunes the performance of HSPA. In terms of timescales, HSPA+ will extend the value of HSPA network investments well into the next decade. Furthermore, it will be an attractive option for HSPA operators, giving them a cost-effective platform to offer competitive high-speed data services while LTE matures.

The well-charted journey to LTE is well underway. 2008 closed on a high note when 3GPP confirmed in Athens that it had approved the 'functional freeze' of LTE. By formally integrating standards for LTE into Release 8, this landmark announcement has given mobile operators the green light to accelerate their own deployment plans. HSPA+, and ultimately LTE, promises us an exciting wireless future. As the capabilities of HSPA evolve, mobile broadband will profoundly change the way people communicate and connect. Tomorrow's consumers and business users will expect a mobile multimedia experience that's as satisfying as fixed

broadband. Electronic devices will demand wide area connectivity and a range of new exciting applications delivered and managed wirelessly. People-to-machine and machine-to-machine communications may well become important market segments in their own right. But just as 3G has transformed today's mobile value chain, evolution to LTE will effect a similar transformation in tomorrow's operator business models.

First commercial deployments of LTE networks aren't expected before a 2010–2011 timeframe. But while LTE still lies a few years in the future, imagining how the world will look is no mere crystal-ball gazing exercise. Thanks to HSPA we're already seeing tomorrow's broadband ecosystem starting to take shape. Consumers and business users are quickly getting used to megabit-plus speeds on the move. Big-name players from the Internet and media worlds are already making their presence felt via high-profile tie-ups with mobile operators in Asia, Europe and the Americas.

Convergence, meanwhile, is re-shaping the landscape as barriers between mobile and fixed line, the Internet and broadcasting keep tumbling. The new value chain we confidently predicted that 3G would create a decade ago is a flourishing reality.

In the UMTS Forum, it's our continuing mission to promote common understanding and a consensus view on mobile broadband and its evolution. If you're as excited about that future as I am, can I warmly invite you to join us as a member and add your own voice to the dialogue?



Jean-Pierre Bienaimé
Chairman
January 2009

A mission to promote the worldwide success of 3G/UMTS evolution

UMTS Forum objectives

- To emphasise the benefits to operators and end-users of 3G/UMTS and its long term evolution in the context of other technologies, in particular towards the European Commission (EC), the International Telecommunication Union (ITU), public authorities and the media.
- To propose a roadmap of 3G/UMTS evolution consistent with that of 3GPP, including adaptations that might be required by the market.
- To facilitate the shaping of a regulatory framework, including the provision of sufficient spectrum, and to progress on spectrum key issues.
- To provide market expectations and inputs to the global standardisation process, and to explore complementary and new technologies.
- To deepen social shaping and customer behaviour studies.
- To ensure a regular watch and reporting action on 3G/3G+ launches worldwide and the evolution of operators' business models.
- To organise promotional actions towards administrations, regulators, media and the financial community, in particular towards key growth markets.



Members attend General Assembly meeting hosted by Magyar Telekom, Budapest, March 2008

Reports and Publications

UMTS Forum members and other industry partners continued to provide inputs to a range of publications including reports and white papers during 2008. These publications have featured prominently in support of the UMTS Forum's presence at a wide range of industry events, including conferences, exhibitions, workshops and technical meetings.

During the course of the year, technical, operational and commercial issues relating to LTE have featured prominently in the Forum's public outputs

Published in February 2008, a major market study prepared for the UMTS Forum by Analysys Research forecasted the market potential for LTE. This groundbreaking report examines the prospects for mobile broadband from now to 2015, considering new mobile services that are likely to develop. From this baseline it offers forecasts for likely demand levels,

and assesses a range of business case models covering various operator deployment options for LTE.

The market study by Analysys Research was complemented by a white paper – also published early in 2008 – that offers a qualitative overview of LTE's key technical features, service possibilities and market context.

Another new white paper, published in February 2009, takes a holistic view of today's – and tomorrow's – 'data explosion'. Titled *Mobile Broadband Evolution: the roadmap from HSPA to LTE*, the paper considers global trends in voice and IP traffic over fixed as well as mobile networks. It paints a compelling case for LTE as a vital next step for operators to anticipate and exploit with tomorrow's data-driven world, where bandwidth-hungry services like video will become increasingly commonplace in the mobile domain.

Also in the final stages of preparation (January 2009) is a major investigation into the future LTE ecosystem. This document's extensive scope considers all elements of the LTE/mobile broadband value chain, from chipsets and mobile devices to applications.

In February 2008, a second White Paper from the UMTS Forum / GSM Association Mobile TV Joint Work Group analysed the economics of Mobile TV services. Taking a user-centric perspective, the paper argues that success in the Mobile TV sector will be measured on one hand by unique features, functions and compelling content, and on the other by co-operation between market actors, leveraging mutual strengths, spreading risks and rewards fairly amongst each other and constantly re-evaluating business models.

As of January 2009, the group is finalising its third and final deliverable: a new white paper that turns the spotlight on "Mobile TV Advertising". Advertising on mobile is a further extension of the fast-growing online advertising market. Today, mobile devices already offer brands an exciting opportunity to reach their audiences in a direct, highly targeted way.

Drawing on traditional associations between broadcasters and the advertising industry, it seems certain that advertising will play a key role in the evolution of TV and video services delivered via mobile. Its success, however, will depend critically on consumer acceptance as well as issues of regulation and pricing.

The new white paper explores the potential of mobile TV advertising to capture a substantial share of the total advertising market. To leverage this vast potential business opportunity, it is of crucial importance for the mobile industry to establish a flourishing ecosystem that parallels that of online advertising. The paper also offers recommendations on some of the challenges and opportunities faced by operators as they roll out mobile TV advertising services, from self-regulation to the need for effective metrics.

Contributions to Standards, Regulatory and Spectrum Bodies- Partnerships with International Institutions

Partnership with ETSI/3GPP

Ongoing co-operation with ETSI and 3GPP to support the standardisation process was reinforced with a range of activities over the course of the year.

Contributions from the UMTS Forum were offered as part of the brand naming process for LTE/SAE, sent to 3GPP on 25 January 2008. The LTE name has subsequently been trademarked by ETSI for the benefit of the 3GPP Partners.

The UMTS Forum was represented in the 3GPP Workshop on IMT-Advanced, held in China on 7-8 April 2008. Representatives of the Forum also attended the 20th 3GPP/PCG/OP meeting on 22-23 April in France, where recent activities of the UMTS Forum were presented.

The UMTS Forum was present at the ETSI GA#51 meeting on 26-27 April in Nice, coinciding with the 20th anniversary of ETSI. The event attracted a large international attendance.

Later in the year, the Chairman attended the 21th 3GPP/PCG/OP meeting in Moscow (06-07 October). The meeting provided an opportunity to present findings of a position paper from the Forum's Spectrum Aspects Group (SAG) on spectrum requirements for IMT-Advanced. This paper highlighted the need to allocate more spectrum for IMT-Advanced using the upper part of the C-band.

Following on from the 3GPP/PCG/OP meeting, the Chairman also participated in the International 3GPP Workshop on 08 October, co-organised by Russia's ICU (Infocommunication Union). At the meeting, the Chairman highlighted the issue of sufficient spectrum to enable the successful introduction of 3G mobile services in the Moscow area.

In 1998, the UMTS Forum became the first MRP (Market Representation Partner) of 3GPP. Near the close of the year, former Chairman Thomas Beijer attended the 10th Anniversary celebrations of 3GPP on behalf of the UMTS Forum in Athens on 09 December.

Participation in ITU activities

The UMTS Forum remains an active member of the three ITU sectors (ITU-D, ITU-R and ITU-T), making regular contributions to meetings.

Participation in the ITU-R 5D meeting (28 January-01 February) in Geneva included progress on the definition of features for IMT-Advanced.

In May, the UMTS Forum Chairman delivered a keynote presentation on Private/Public Partnerships at ITU Telecom Africa 2008 in Cairo. The event also provided an opportunity for a private meeting between the UMTS Forum Chairman and ITU Secretary General Dr Hamadoun Touré to discuss the enrichment of mutual activities between the two organisations, as well as a deeper involvement of the UMTS Forum in the ITU Telecom Forum programme. In the spirit of the Forum's growth markets action plan, the Chairman also met Mr Al-Basheer, Director of ITU-D to discuss continuation of UMTSF involvement in the ITU-D regional seminar programme.

In June, representatives of the Spectrum Aspects Group took part in the second ITU-R 5D meeting in Dubai, featuring a contribution "UMTS Forum view on IMT-Advanced Requirements". This contributed to positive results in the meeting, in particular on a number of test environments and scalable bandwidth. The UMTS Forum's ad hoc group on IMT-Advanced has consequently proposed to focus its efforts on two key subjects:

- Assessment of WP-5D results and encouragement of a dedicated IMT working party.
- Development of possible contribution to the ECC/PT1 and WP-5D on IMT-Advanced.



UMTS Forum Chairman meets ITU Secretary General Dr Hamadoun Touré



ITU Telecom Africa Welcome

The UMTS Forum also participated in the ITU-R 5D meeting on 09-15 October in Seoul, South Korea. The Forum contributed successfully to the first phase of the IMT-Advanced process at ITU, with the finalisation of technical documents that were approved in plenary session:

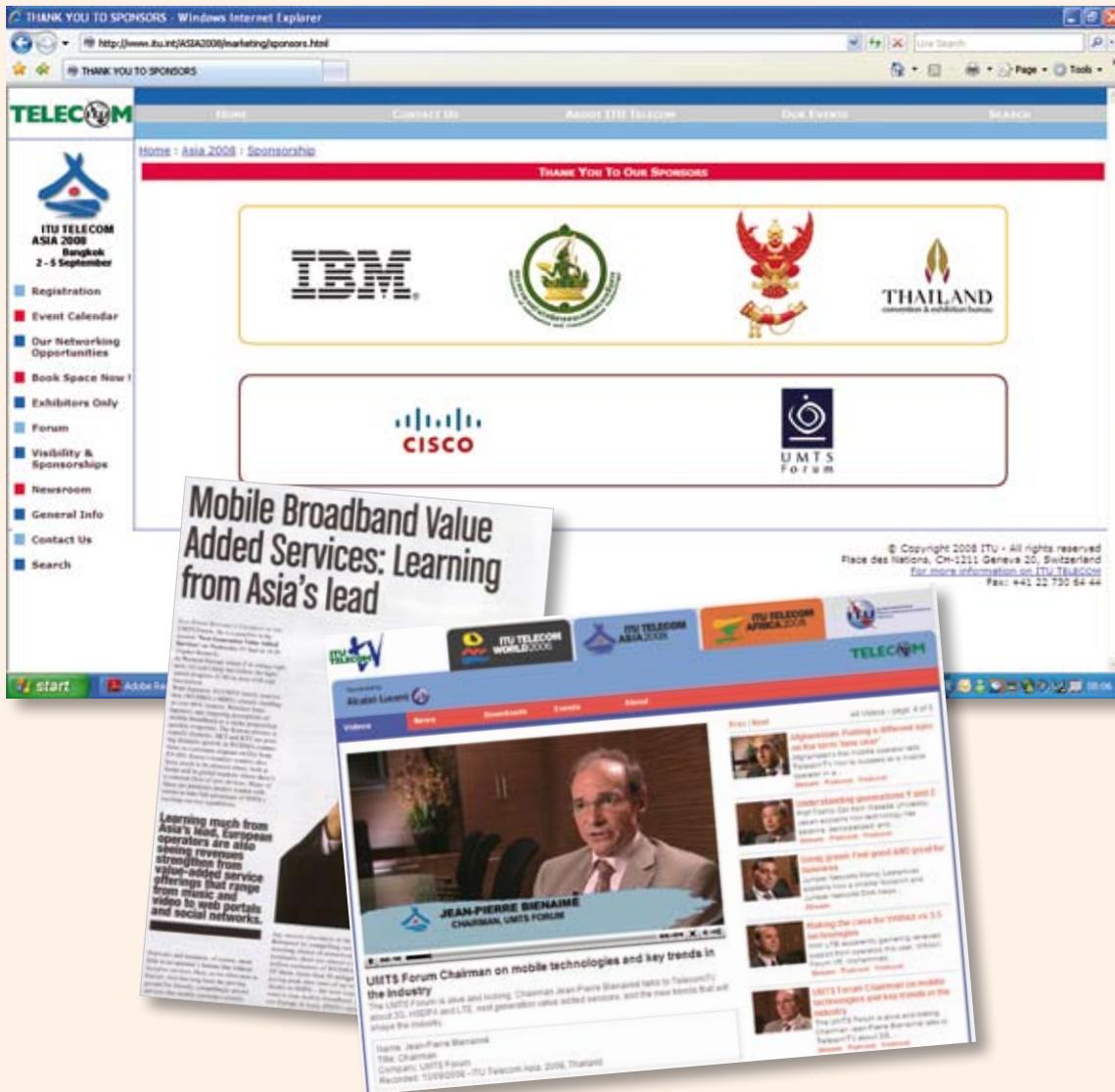
- IMT-EVAL, which describes the methodology to become an IMT-Advanced technology
 - Technical Description Template (TDT), which contains additional questions to standards to obtain parameters for simulations to better assess candidates Radio Interface Technologies (RITs).
- TDT will be included in the Circular Letter.

Other aspects were examined, such as Services/General aspects, resulting in the definition of ITU-R 5D responsibilities on the basis of updated ToRs and in the development of the work program. The Forum also contributed successfully to the preservation of a focused WP-5D in charge of IMT within ITU Study Group 5. Developing aspects were also examined, in order to determine areas of joint studies with ITU-D, such as guidelines on smooth transition from pre-IMT Systems.

Frequency arrangements and sharing issues were also examined, as well as respective proposals of additional FDD and TDD interfaces for Mobile WiMAX and CDMA, that were postponed for further studies.

UMTS Forum at ITU Telecom Asia 2008

For the first time, the Forum strengthened its visibility at this key regional event as a Bronze Sponsor of ITU Telecom Asia 2008 Forum & Exhibition in Bangkok from 02-05 September. Prominent appearances in delegate materials and on-line branding opportunities were complemented by a two-page feature article on Value Added Services appearing in the Show Daily newspaper.



In the main conference, the UMTS Forum Chairman delivered two keynote presentations: "Towards a new generation of user interfaces", and "Mobile broadband Value Added Services". Other members of the UMTS Forum Steering Group also represented their companies with conference presentations and chairing of panel sessions.

In late November, the UMTS Forum participated in the "ICT 4 All Forum -Tunis+3: Broadband, industry of content for development" event on 28 November, where the Forum Chairman served as a presenter and panellist, discussing mobile broadband evolution, new services and economic benefits. Organised by ITU, the United Nations Conference for Trade & Development (UNCTAD), African Development Bank (ADB) and Tunisian Ministry of Communication Technologies, this unique event represented a key milestone as a follow-up three years after the World Summit on the Information Society (WSIS) in Tunis. ITU Secretary General Dr Hamadoun Touré reminded the conference audience of ITU targets for 100% for mobile and 15% for broadband (> 1Mbps) penetration globally by 2015.

Support to CEPT/European Commission Activities

Early in the year, members of the UMTS Forum's Spectrum Aspects Group actively participated in CEPT/ECC/PT1 meeting on 14-16 January in Helsinki.

In late February, the document "UMTS Forum Recommendation to EC for the deployment of Mobile TV within the EU" was sent as a response to the Regulatory Best Practice Framework Workshop held on 15 February in Brussels. The Forum's contribution emphasised the need for the Commission to enable a transparent regulatory environment that will support sustainable economics for mobile, while providing incentives for stakeholders to invest.

SAG members also participated in CEPT/ECC/TG4 meetings on 31 March-3 April in Norway and 16-19 June in Dubrovnik, as well as the ECC/PT1 meeting on 14-16 May in Dublin.

The UMTS Forum Chairman delivered a presentation on "IMT: New Openings for Effective Regulation" at the 14th CEPT Conference "Technology and Regulation" in Strasbourg, France, on 17 April.

Later in the year, SAG members participated at the CEPT/ECC/PT1 meeting on 16-18 September in Paris, CEPT/ECC/TG4 meeting on 9-12 September in Latvia and ECC/TG4#11 meeting in Helsinki, Finland on 8-12 December.



National Communications Authority of Hungary President and European Regulators Group Chairman Daniel Pataki addresses General Assembly meeting in Budapest

Responses to public consultations

The UMTS Forum has continued to offer its own response to public consultations as an integral part of its mission to shape the 3G/mobile broadband regulatory framework.

These included a response (in early May) to a consultation issued by the French Parliamentary Commission on Digital Dividend. On 05 July the Forum responded to the Public Consultation on draft licensing guidelines for establishing, operating and maintaining Broadband Wireless Access (BWA) services in Bangladesh. This was followed on 29 September with a response to the Spanish consultation on the use of the 2,500 to 2,690 MHz frequency band and on possible new modalities of operation for the 900 MHz, 1,800 MHz and 3.5 GHz frequency bands.



Members continue to offer regular UMTS Forum responses to public consultations globally

Promotion, Communication and Lobbying Events

The Forum has maintained a prominent industry profile through its endorsement and participation at key conferences, exhibitions, seminars and workshops worldwide.



Over the course of the last year there were over 60 events where the Forum provided keynote speakers, presenters, panellists and session chairs, or offered its endorsement. In particular, the UMTS Forum Chairman, Vice Chairs and Officers spoke at the following events in 2008:

- IET International Conference on Wireless Mobile & Multimedia Networks, Mumbai, India (11-12 January 2008)
- 3G Optimisation & UMTS900, Berlin, Germany (11-13 March)
- NTRA/Qualcomm Seminar on Mobile TV and Digital Dividend, Hurghada, Egypt (2-3 April)
- East-Africa.com, Dar es Salaam, Tanzania (8-9 April)
- 14th CEPT Conference "Technology & Regulation", Strasbourg, France (16-17 April)
- Digital Africa Summit "Next Generation Convergence Driving Positive Change" - Johannesburg, South Africa (22-23 April)
- IIR Transport Networks for Mobile Operators, Amsterdam, Netherlands (11-14 May)
- ITU Telecom Africa 2008, "ICTs in Africa: a continent on the move", Cairo, Egypt (12-15 May)
- TD-SCDMA Evolution & LTE Summit, Shanghai, China (31 May-1 June)
- Russia & CIS.com, Moscow (3-4 June)
- ITU Telecom Asia, Bangkok (2-5 September)
- LTE World Asia, Taipei, Taiwan (8-10 September)
- Mobile Backhaul Conference, Madrid (9-10 September)
- Bercut VAS Commerce Summit, St Petersburg, Russia (11-12 September)
- Beacon India Telecoms Conference, Delhi, India (23-24 September)
- EEBC 2008 Telecom and Broadcasting conference, Kiev, Ukraine (October 29-31)
- IREST Digital Dividend Roundtable, Paris, France (16 October)
- Simmons & Simmons TMT Sector Retreat, Paris, France (24 October)
- FutureCom 2008, Sao Paulo, Brazil (27-30 October)
- EEBC 2008 Telecom and Broadcasting conference, Kiev, Ukraine (October 29-31)
- FT World Telecoms Conference, London (3 November)
- Femtocell Deployment World Summit, Amsterdam (4-6 November)
- LTE World Summit, London, UK (18 November)
- 4th UMTS Forum / IDATE Mobile Seminar at Digiworld Summit, Montpellier, France (19-20 November)
- China Mobility International Summit 2008, and Mobility World Congress, Beijing, China (25-26 November)
- "ICT 4 All Forum - Tunis+3, Broadband, industry of content for development", Tunis, Tunisia (28 November)
- India Telecoms 2008, Connecting Rural India & CEO's Ministerial Roundtable, Delhi, India (11-12 December)
- GSM > 3G Middle East, Towards a broadband world, Dubai, UAE (15-16 December)

PR and External Communications

The UMTS Forum continued to stimulate and respond to the news agenda with regular press releases on a range of topics. During 2008 these included mobile broadband subscriber growth, spectrum allocation for IMT-2000 in Brazil, Mobile TV and UMTS900, as well as 3G licensing developments in India and China.

Press releases were complemented by a schedule of briefings to international and regional newspapers, magazines, on-line publications and broadcast news services.

Personal briefings with international telecoms and business writers were held in the Forum's hospitality suite at the Mobile World Congress in Barcelona (11-14 February 2008).

Broadcast television appearances included an interview with the Chairman on CNBC Africa in Johannesburg during April, on the occasion of the Digital Africa Summit in April. He was also interviewed by Telecom TV during ITU Telecom Asia September in Bangkok (September), and FutureCom 2008 in Sao Paulo, Brazil (October). Other briefings and TV interviews took place during the LTE World Summit in London (November) and the IDATE Digiworld Summit in Montpellier, France (November).

Mobile broadband industry developments are summarised in Mobilennium Express, the Forum's free e-newsletter that highlights selected PR announcements from 3G/UMTS operators, manufacturers and application developers on a weekly basis. This newsletter has recently been enhanced with the addition of value-added opinion and analysis on key stories.

Data on mobile broadband subscribers, network launches and other data from market information provider Wireless Intelligence offers a valuable resource on the UMTS Forum web site.





Collaboration is key to success for Mobile TV

New UMTS Forum/GMSA white paper presents positive economic outlook for Mobile TV

11 February 2008, Barcelona: Timely creation of a regulatory environment in which investments in mobile TV network infrastructure and services will be key to success for Mobile TV network operators.

Titled 'Sustaining Mobile TV promises a content provided by other video delivery services'.

Part of an ongoing white paper series in a typical EU between content providers and operators.

A key conclusion of the effective collaboration between content providers and operators.

Driven by global video traffic and cellular network capabilities.

This exponential growth...



Technology neutrality the way ahead for 3G licensing in India

Timely access to spectrum is essential for India to keep pace with mobile broadband developments worldwide

16 December 2008: 3G industry association the UMTS Forum (www.ums-forum.org) congratulates India's Ministry of Communications & IT for having publicly presented and clarified on 12 December 2008 the details of licensing and other conditions for the 3G & 3.5G auctions that are expected to take place by end January 2009. At present India has over 325 million mobile subscribers projected to increase to 650 million by end 2012. The UMTS Forum applauds Honourable Prime Minister Dr Manmohan Singh who put India on the global 3G services on the state-owned UTS.



UMTS Forum welcomes Chinese 3G licensing announcement

License awards will kick-start investment in mobile broadband development

14 January 2009: The UMTS Forum has welcomed news that China has issued 3G licenses on 7 January 2009.

With the endorsement of China's highest ruling body, the State Council, the Ministry of Industry and Information Technologies (MIIT) announced that it has awarded licenses for third generation (3G) mobile networks to the three state-run telephone operators.

MIIT has stated that it expects license awards will trigger a fresh wave of investments in telecom infrastructure and services, providing extra support to the country's economy. The Ministry has indicated recently that it expects the three operators to spend over €30 billion building their networks over the next two years.

China's second largest mobile group, China Unicom, has confirmed that the company received licence to roll out 3G mobile services nationally using WCDMA technology. The operator currently has just over 130 million mobile subscribers, with overall mobile penetration in China now standing at nearly 50%, with more than 62 million subscribers.

China Mobile, meanwhile, received a TD-SCDMA licence, while China Telecom was allocated CDMA2000 licence.

No service launch date has been announced so far. However it is likely that Chinese operators will aim for speedy 3G launches, following on from their extended testing and trial phases.

MIIT has recently predicted that mobile subscriptions will swell to nearly 800 million by 2011 and the Ministry also anticipates that the number of 3G users could reach 130 million by 2011 or within 5 years.



300 million UMTS subscribers: mobile broadband goes global

More than 400 million 3G customers around the world

London, 06 October 2008: Mobile broadband industry association the UMTS Forum has confirmed today that 3G subscriptions to UMTS networks based on WCDMA technology have exceeded 300 million (source: Wireless Intelligence www.wirelessintelligence.com).

UMTS/WCDMA now represents almost a tenth of global GSM/UMTS family (comprising GSM, EDGE, WCDMA and HSPA) that now surpasses 3.3 billion connections. Aggregated with 100+ million connections* to CDMA2000 1xEV-DO networks, the total of all 3G cellular customers worldwide has passed 400 million.

Of more than 300 million UMTS subscribers worldwide, this total includes almost 60 million customers of HSPA, the smooth evolution of UMTS/WCDMA to High Speed Downlink Packet Access (HSPA) and Generation Partnership Project (GPP) 3G+.

Deployed as a strategic enabler for mobile broadband, HSPA is significantly reducing the compatibility with 2G networks.

Global demand for mobile broadband is growing by 4 million per month, reaching 200 million by the end of 2008. This represents 230 commercial networks and 70% of the total.

While it took four years to reach 100 million, the milestone was reached in just 18 months. This is a testament to the high competition and rapid evolution of the mobile broadband market.

The UMTS Forum represents the interests of mobile broadband operators and will continue to work with industry partners to ensure a smooth transition to 4G networks.



Key Growth Markets Action Plan

Significant differences regarding the availability of affordable communication technologies between developed and developing countries are often characterised as the 'Digital Divide'. Closing this technology gap can play a role in bridging the wider economic divide between different world regions.

During 2008 the UMTS Forum continued to provide guidance on spectrum harmonisation and the 3G licensing process to national administrations, notably in two of the world's largest growth markets.

China's long-awaited schedule for 3G licensing moved forward during 2008 based on the restructuring of the telecoms sector into three state-owned operators. In November, the UMTS Forum Chairman delivered a keynote presentation at the China Mobility International Summit in Beijing (25-26 November), delivering a clear message of the importance for China to accelerate its licensing plans. In early January 2009, China subsequently confirmed 3G license awards to the three state-run telephone operators. The UMTS Forum has predicted that China's first wave of 3G deployments could be followed by LTE (Long Term Evolution) commercialisation as early as 2012-2013. MIIT already has signalled its focus on evolution towards next-generation networks, with TD-SCDMA offering a pathway to TD-LTE in China.



Prime Minister Dr. Manmohan Singh makes India's first 3G video call at India Telecom Summit, December 2008

During the course of the year, the UMTS Forum was also active in urging India's national administration to complete its 3G and BWA auctions, thus encouraging the commercial success of 3GPP-based mobile broadband systems. The Forum Chairman addressed a keynote presentation at the India Telecom Summit, organised in December by the Ministry of Communications and IT, and also presented a statement at the CEO's Roundtable chaired by the Minister and the Secretary of the Department of Telecoms (DoT).

Working in close co-operation with the Cellular Operators Association of India (COAI), the UMTS Forum congratulated India's Ministry for having publicly clarified its licensing conditions for 3G & BWA auctions, in advance of licensing in early 2009. It also expressed some concerns relative to the allocation of spectrum in the 2.6 GHz band, at the Public Presentation of the 3G & BWA auction policy by DoT.

The UMTS Forum also supports a globally harmonised solution to providing sufficient mobile spectrum to meet future market demand for mobile broadband services. In some world regions, this requirement for the provision of cost-effective coverage in large areas of low population density can be met successfully by the use of frequencies in the sub-Gigahertz band for IMT-2000 services and their evolution. In partnership with GSA (the Global mobile Suppliers Association), the UMTS Forum organised two joint workshops on UMTS 900. The first took place on 20 November in Cape Town, RSA, alongside the Informa Africa.com conference. The second was held in Dubai on 17 December, in parallel with the Informa GSM > 3G Middle East conference.



UMTS Forum Work Programme 2009

Communication and Promotion	
Visibility and participation at conferences, exhibitions, seminars and workshops	Relationships with international media and financial community
Key focus Areas	
Spectrum & Regulation	Global Mobile Broadband/LTE Ecosystem
Advice to industry and administrations on 3G/LTE licensing & regulation	Roadmap and competitive benefits for HSPA, LTE and beyond
Global spectrum and spectrum arrangements for UMTS/IMT-2000 and IMT-Advanced	
Key Growth Markets Action Plan	
Contributions to international organisations (ITU, EC, CEPT/ECC, 3GPP)	
Partnerships with international bodies (ETSI, NGMN, GSMA, ICU, COAI, APT, 3GAs...)	

Specific activities for 2009

Global Mobile Broadband/LTE Ecosystem

- Forecast evolution of HSPA/LTE market, services and usage for period 2009–2020.
- Co-operation with NGMN, e.g. in optimised backhaul solutions for 3G and evolutions, and on green issues and progress.

Spectrum & Regulation

- Promotion of harmonised usage of IMT-2000 bands for 3G/UMTS & Evolution, and continuation of studies on relevant spectrum issues for IMT systems.
- Dialogue with Regional Administrations (Africa, Latin America, Asia-Pacific) on the benefits from IMT-2000 evolution and IMT-Advanced in reducing the digital divide.
- Participation in discussions/studies on the European harmonisation and of usage of digital dividend.

Key Growth Markets

- Continued activities focused on growth markets, including studies and workshops, dialogue with regulators, targeted messages and PR. In particular, the UMTS Forum will monitor and support the anticipated issue and deployment of 3G licences, and also mobile broadband roadmap and technical choices in key markets in Africa, Middle-East, Eastern Europe, and Asia, including China and India.



General Assembly meeting hosted by Orange Slovensko, Bratislava, July 2008



If you are interested in finding out more about the work of the UMTS Forum and the benefits of membership, please contact us at:

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