

3GPP PCG11\_22

Agenda Item 11

Boston, October 1, 2003



## Report to 3GPP PCG #11

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# GSA - Global mobile Suppliers Association

## - representing the leading GSM/3G suppliers globally



**GSA is the only representative body** for the GSM/3G supplier industry, bringing together all views on GSM/3G

### Objectives

- ▶ to strengthen promotion of GSM world-wide in new and existing markets
- ▶ to support operators and promote the evolution of GSM as the platform for delivery of third-generation (3G) multimedia services

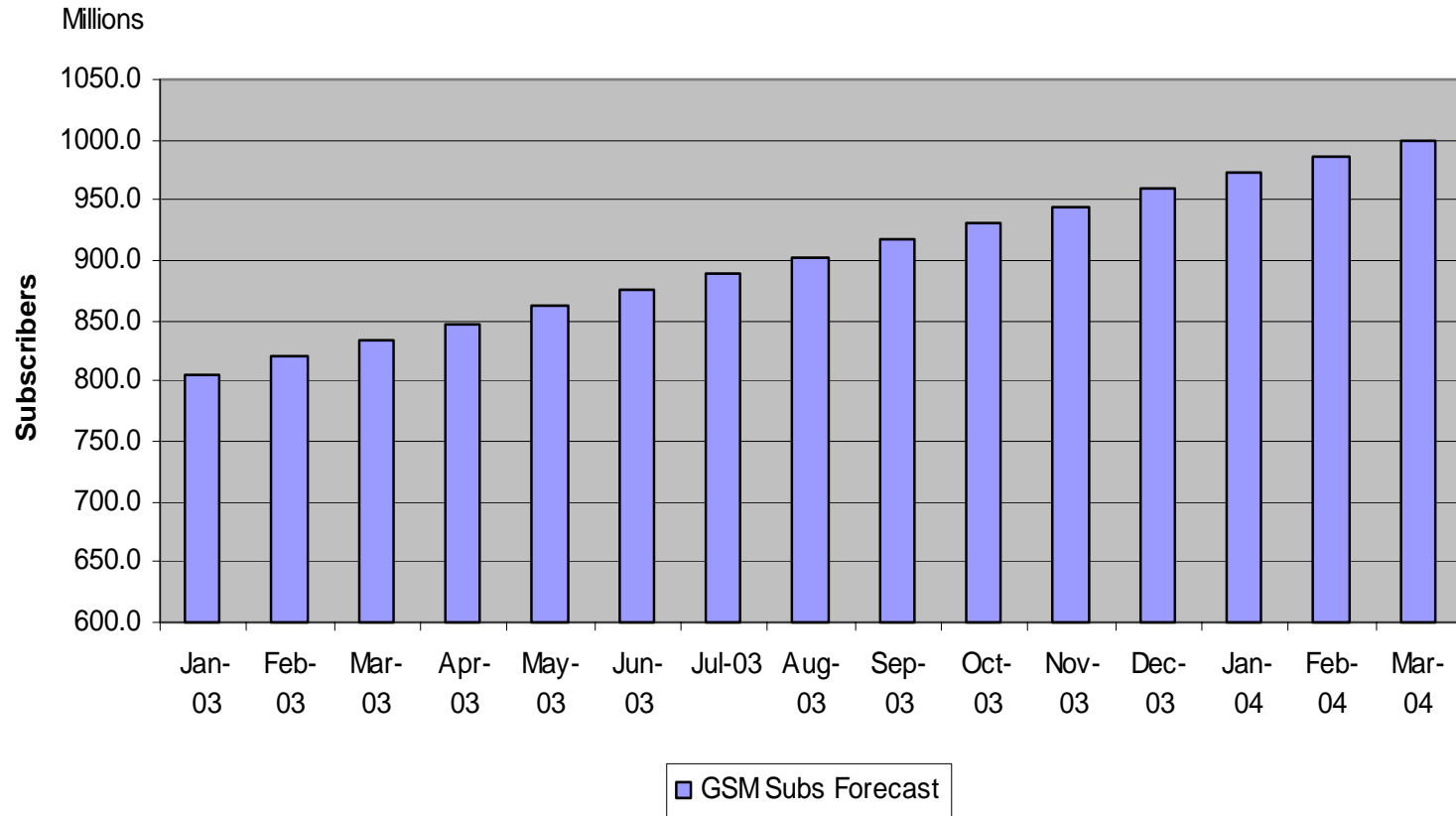
### Key Deliverables

- ▶ Workshops, seminars, EOF
- ▶ Surveys and White Papers
- ▶ Regional Chapters - India, APAC
- ▶ Briefings & information sharing with key industry contacts globally, including media, operators, regulators, investors, analysts, venture capitalists, suppliers

# GSM could reach 1 billion subs by March 2004



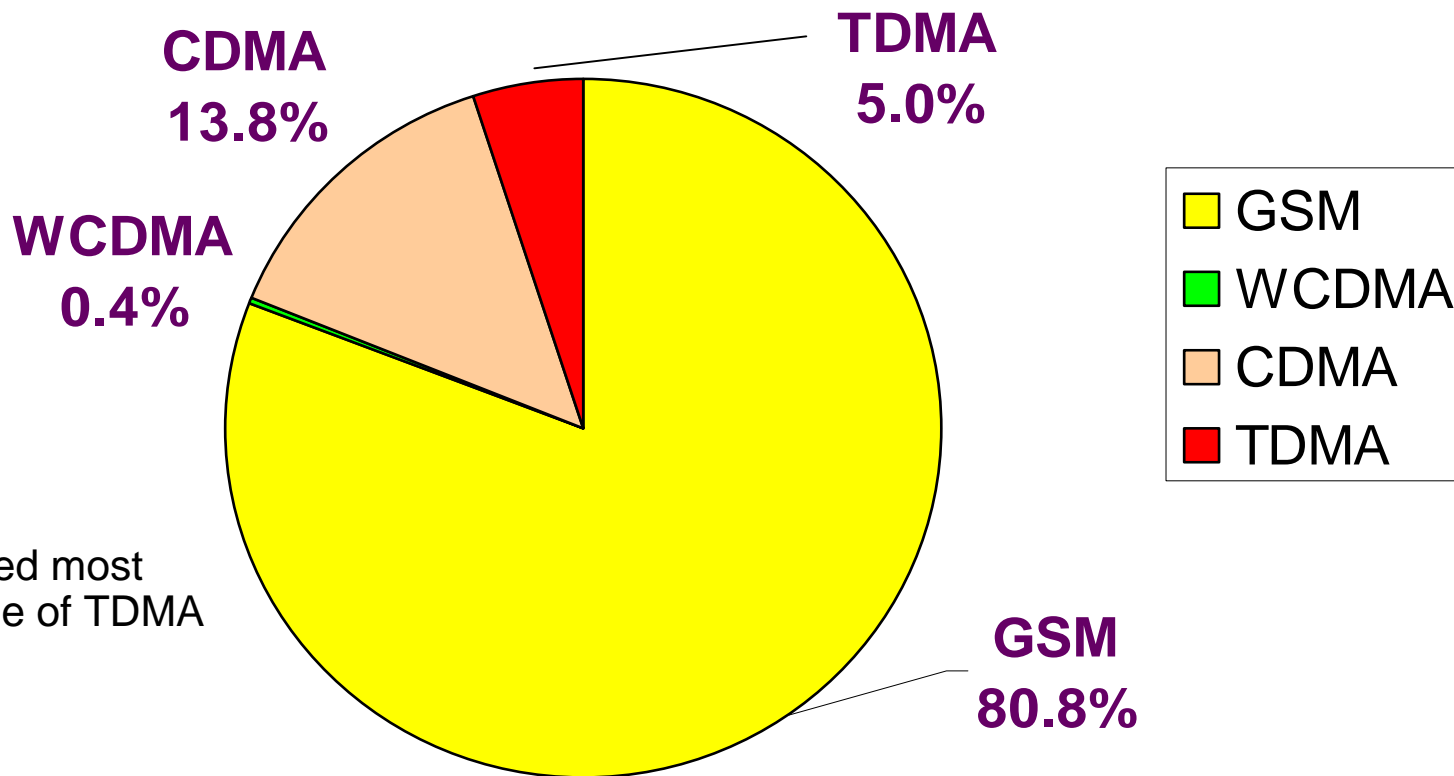
**GSM Subscriber Forecast  
to March 2004 (actual to May 2003)**



Source: EMC Database and GSA Member company estimates

Global mobile Suppliers Association © 2003

# GSM accounted for almost 81% of new subs growth in 1Q 2003 globally



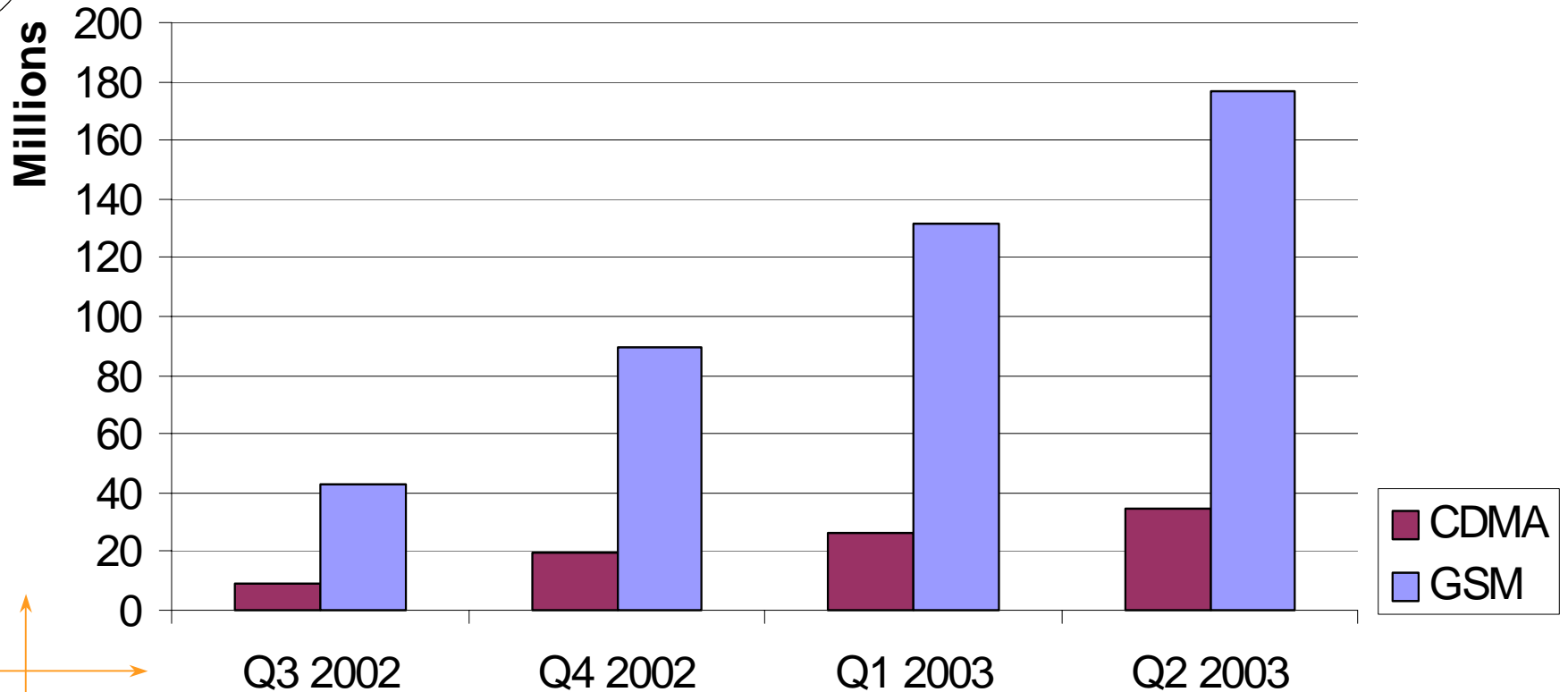
GSM has gained most from the decline of TDMA

Source: EMC World Cellular Database

# GSM added almost 180 m. new subs in last year



GSM and CDMA subscriber growth (global, cumulative)

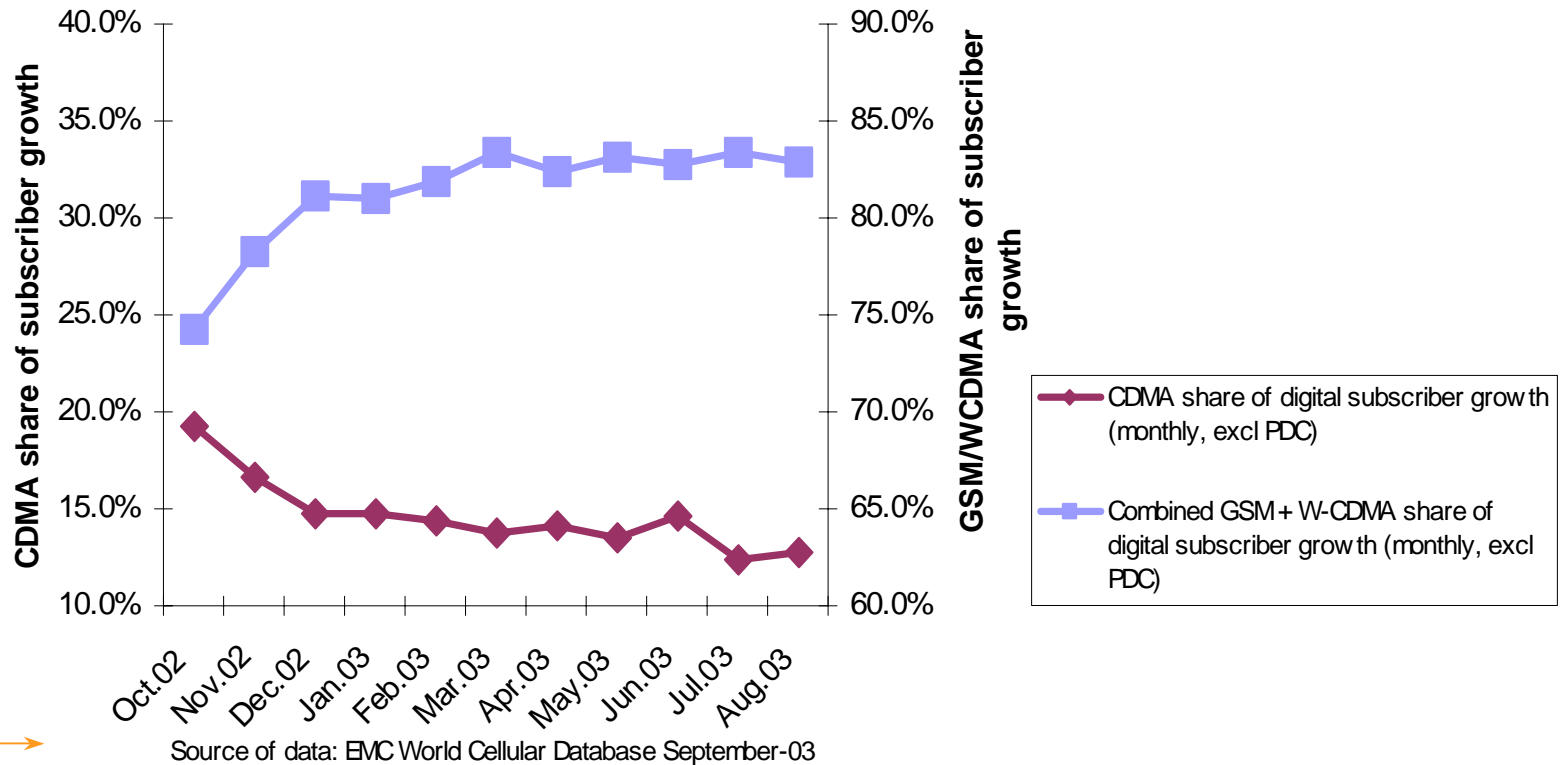


Source of data: EMC World Cellular Database, September-03

# GSM/WCDMA up to 82% of global digital subscriber growth



Share of subscriber growth (monthly, global)

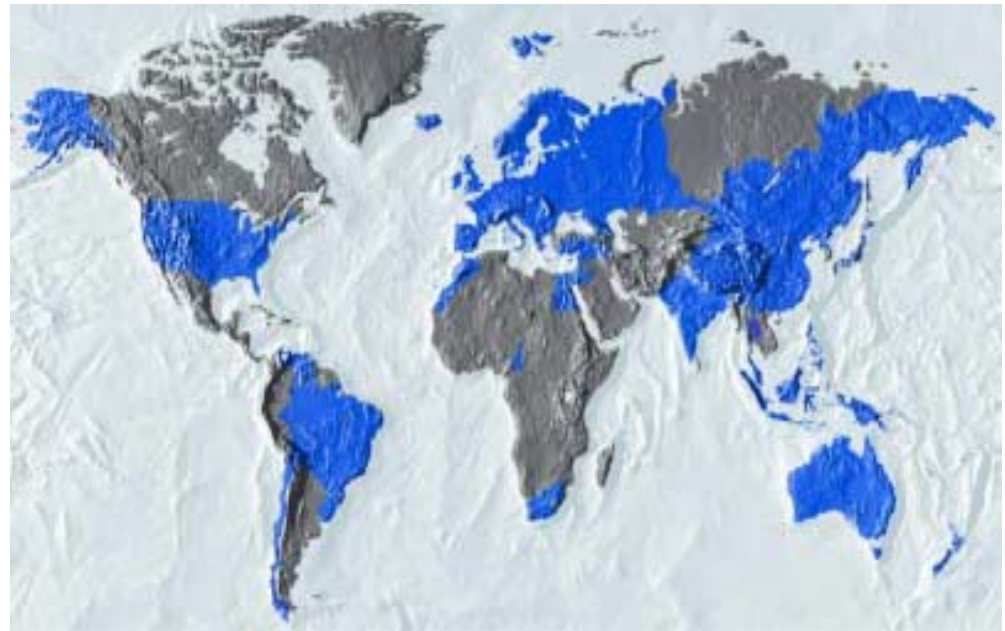


# 142 commercial MMS networks globally

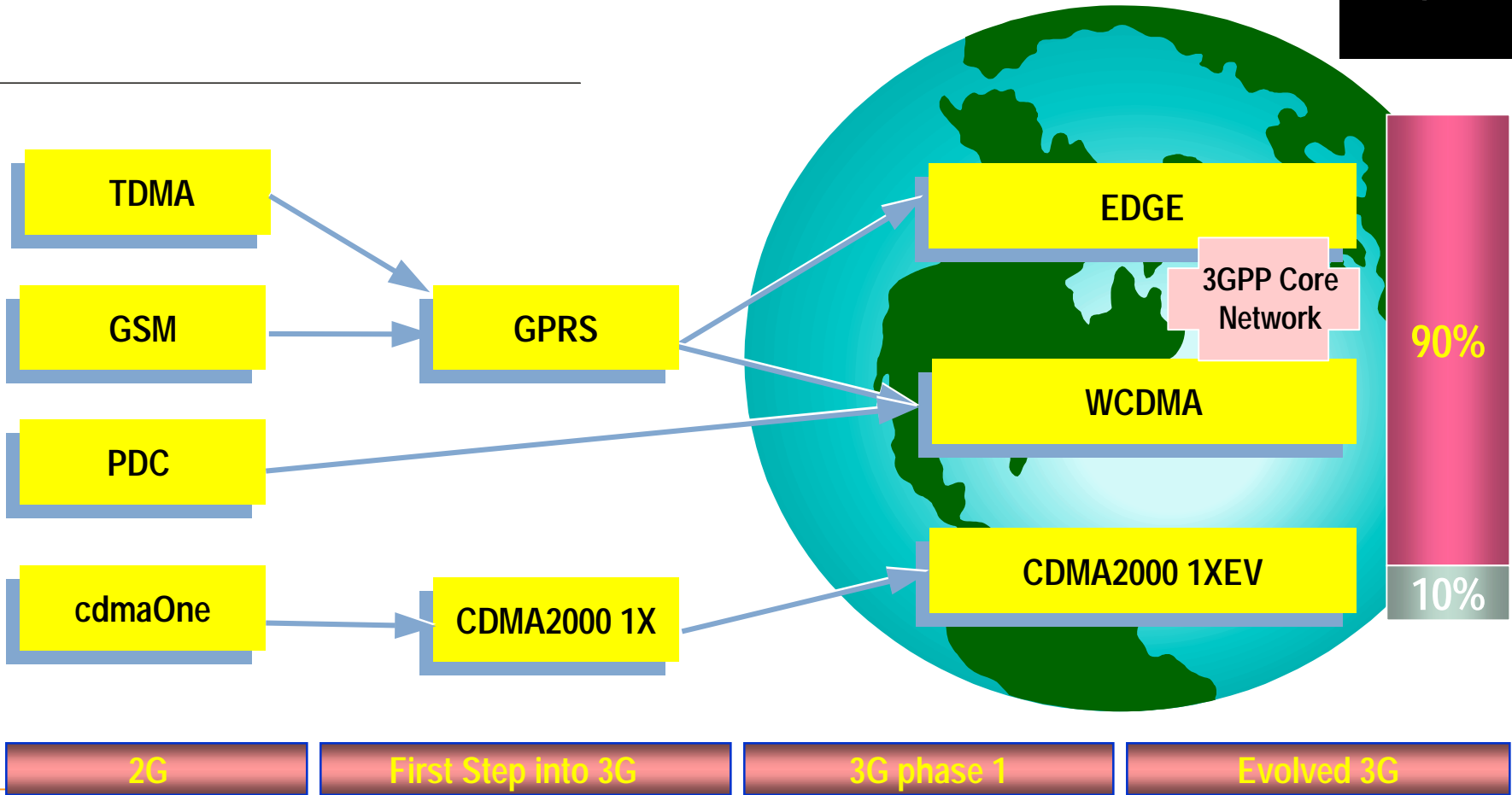
Major additional boost to GSM data leadership



- ▶ 97 in Europe, 37 in APAC and 8 in Americas
- ▶ Global roaming increasingly available – dozens of operators generate profit
- ▶ By end of June 2003 there were 5 Million MMS subscribers
  
- ▶ By end of 2003 many operators target 10% MMS penetration
- ▶ Vodafone Live! alone targets 8 Million users by end of 2003



# Evolution of Mobile Systems to 3G





# What is EDGE all about?



- ▶ Capacity
- ▶ Speed
- ▶ Complementary with WCDMA - open standards

# EDGE with WCDMA

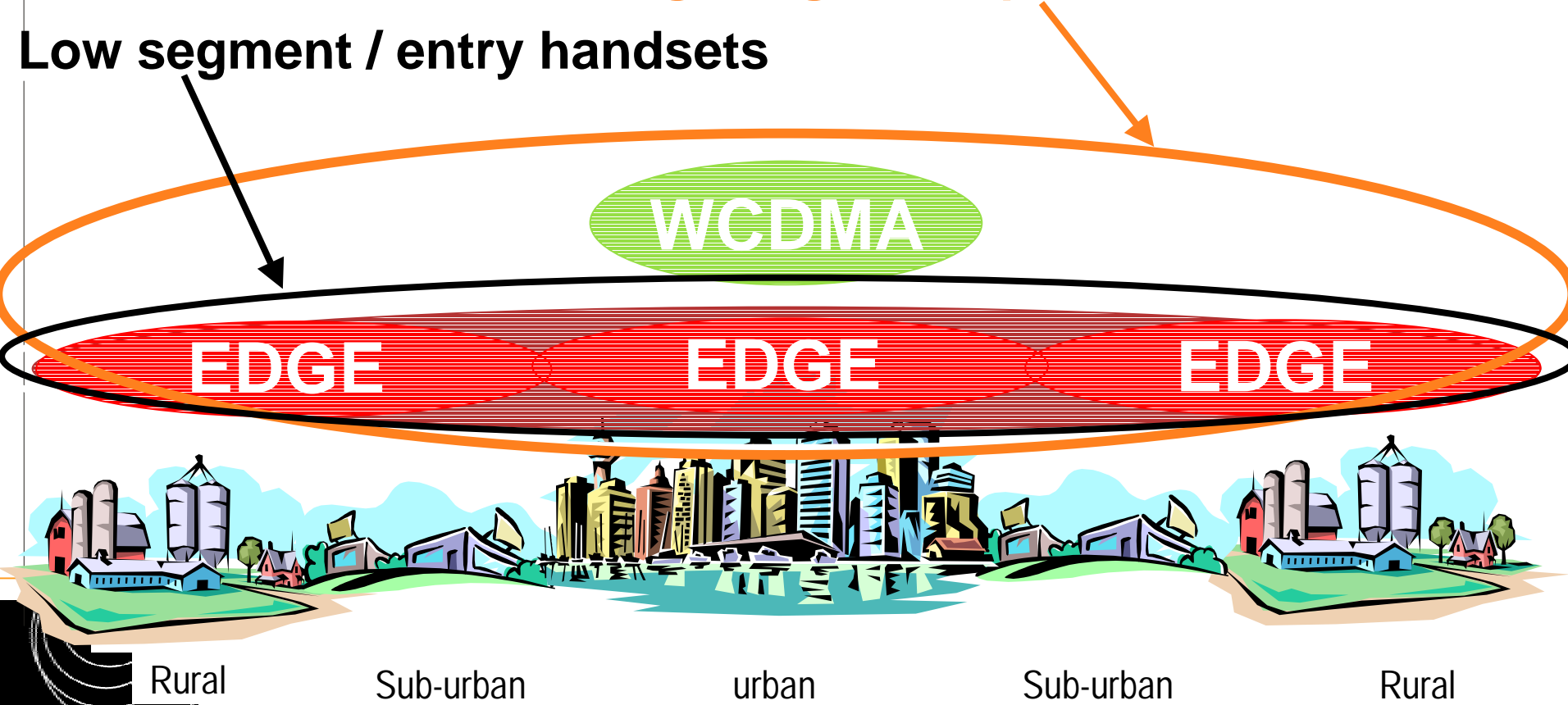
- rollout options for mature operators



Source: Ericsson AB

High segment / professional handsets

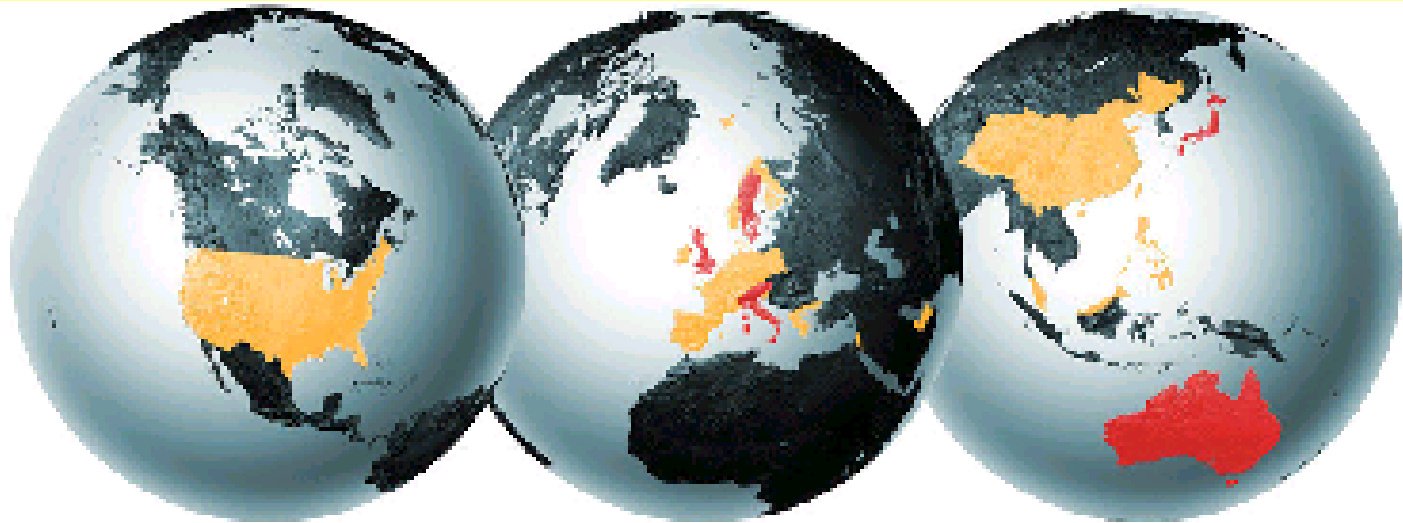
Low segment / entry handsets



# WCDMA deployments



- ▶ Most spectrally-efficient 3G radio technology for IMT-2000 spectrum > 100 kbps
- ▶ Commercial in Australia, Austria, Japan, Isle of Man, Italy, Luxembourg, Sweden, UK
- ▶ EMC estimates 93 commercial WCDMA networks in 34 countries by end 2005

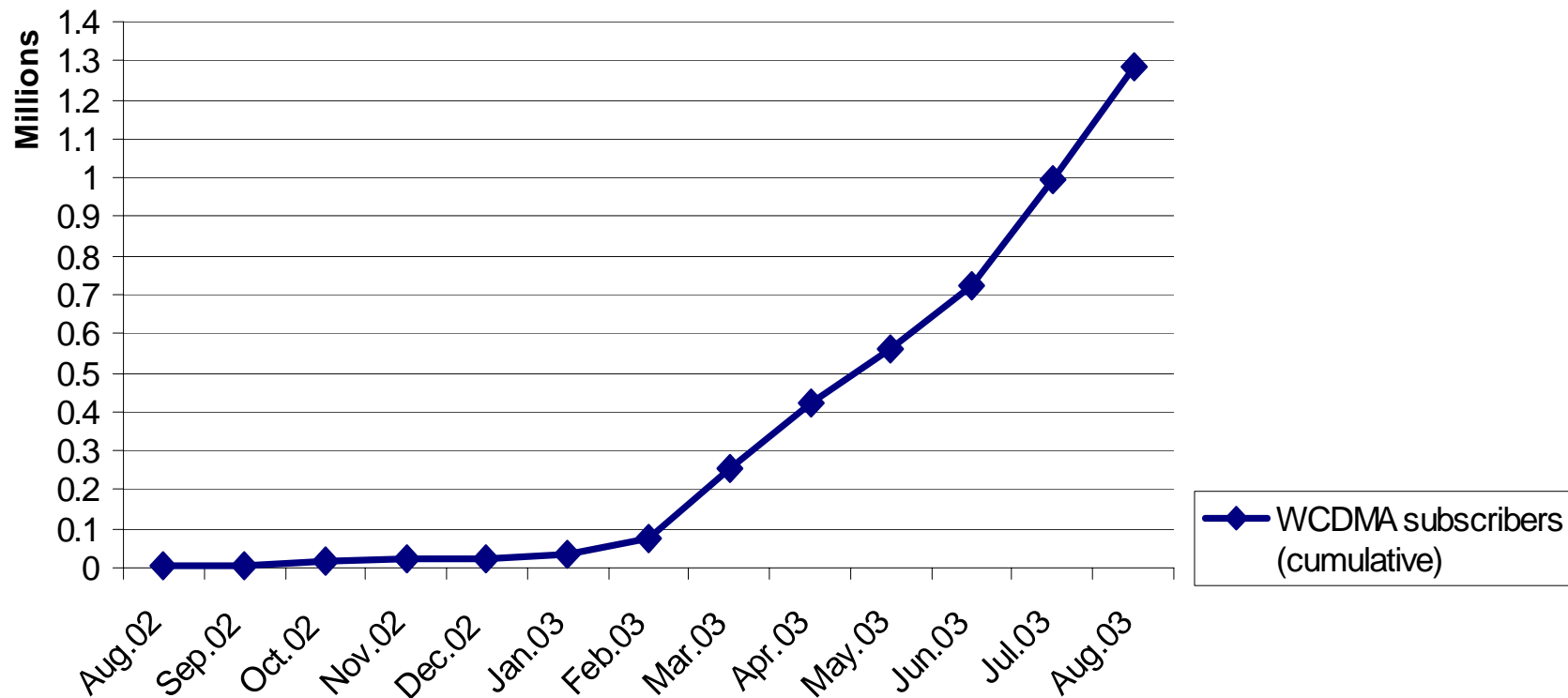


- WCDMA commercial deployment - end July 2003
- WCDMA commercial deployment - planned end 2005

# 1.3 m. WCDMA subscribers



WCDMA subscribers (cumulative)

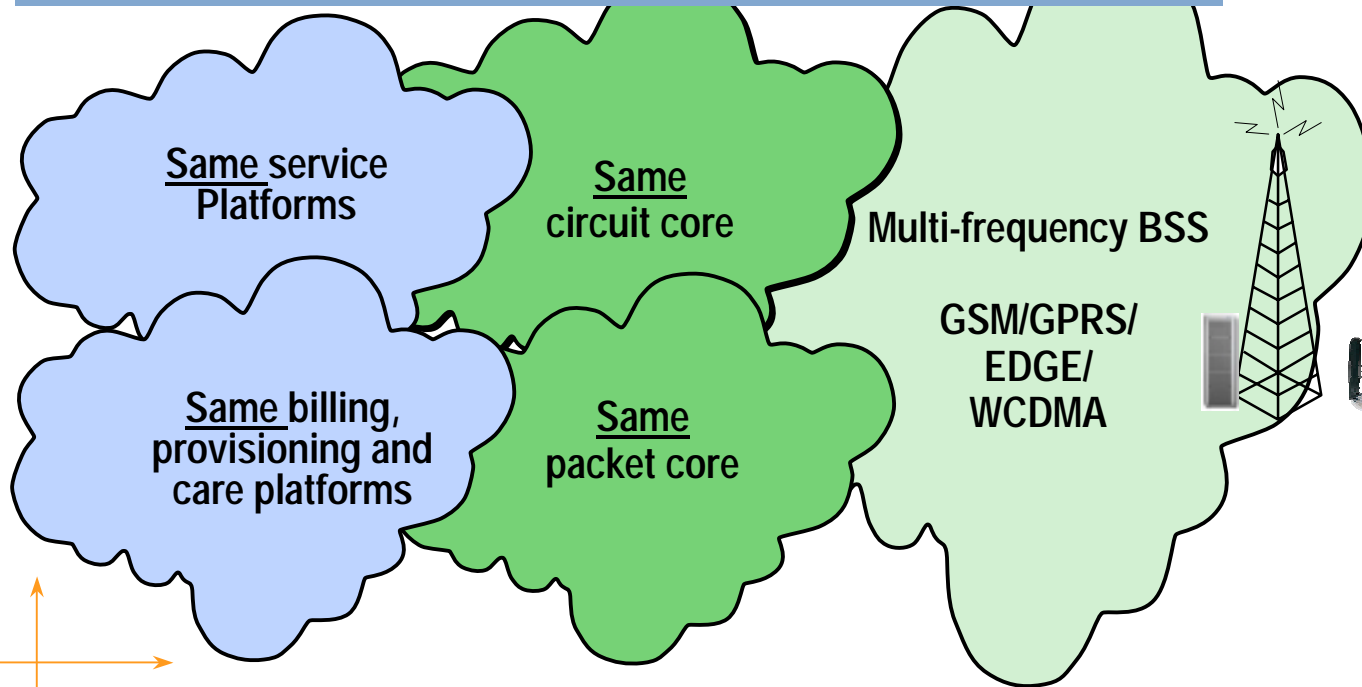


Source of data: EMC World Cellular Database September-03

# Many services on single network; meeting service goals with lowest CAPEX and OPEX



Common end-to-end management



Multiple services/tariffs



Global handsets

# EDGE and WCDMA - complementary



- ▶ EDGE + WCDMA = maximum coverage & flexibility for lowest CAPEX & OPEX
- ▶ Simple service migration
- ▶ EDGE with WCDMA provides similar user experience and service continuity, including roaming
- ▶ Builds/evolves existing applications/service portfolios; > 1m. Developers
- ▶ Gradual investment; step-by-step evolution
- ▶ High GSM investment re-usability
- ▶ EDGE and WCDMA will be mass market products

# EDGE market reality

## - now in the commercialisation phase



EDGE is an open standard, complementary to WCDMA

All major GSM vendors are delivering EDGE-capable systems:

- ▶ Alcatel, Ericsson, Motorola, Nokia, Nortel Networks, and Siemens
- ▶ Supporting all cellular bands: 800, 900, 1800, and 1900 MHz

EDGE device vendors include:

- ▶ Motorola, Nokia, Novatel, Samsung, Siemens mobile, Sierra Wireless, Sony Ericsson
- ▶ EDGE Terminals available globally from Q3 2003
- ▶ All new GSM/GPRS devices expected to support EDGE from 2004

EDGE Operators:

- ▶ Operators deploying or trialling EDGE on all continents
- ▶ 51 public commitments including AT&T Wireless, Cingular, CSL, DTAC, Globe, TIM, Pannon, Peoples Tel., Smart, Bouygues Telecom
- ▶ **Already more EDGE commitments outside than inside Americas**



# EDGE = Turbo GPRS

## - Take Aways



- ▶ EDGE is global reality; commercial in USA and Hong Kong;
  - ▶ 51 operators committed across the Americas, APAC and Europe
- ▶ EDGE provides high performance at low cost
  - ▶ EDGE enables differentiation; creates addiction
  - ▶ Catalyst for new mobile data services; enables services take-off
  - ▶ safeguards 2G investments, assets, spectrum (900/1800 MHz)
  - ▶ high data speeds in rural/suburban areas; WCDMA arrives later
- ▶ EDGE is complementary to WCDMA, not a competitor.
- ▶ *EDGE is an **integration** in its first years and an **ally** in its maturity (Mauro Sentinelli, MD, TIM, Italy)*



# GSM/EDGE/WCDMA updates via the web site



## Register at [www.gsacom.com](http://www.gsacom.com) to obtain:

- ▶ Market data, industry news updates and developments
- ▶ Operator and vendor announcements
- ▶ GSM Network Update – quarterly
- ▶ Information about seminars, forums, etc. and how to participate
- ▶ Press reports, articles, and interviews
- ▶ EDGE Operator list updates – global
- ▶ GMD™ Newsletter – monthly
- ▶ White papers
- ▶ The GSM Evolution – video/DVD
- ▶ etc.

*Dedicated Operators' Zone for GSM/3G Operators  
Includes substantial resources - services,  
applications, business, technologies including  
EDGE & WCDMA  
Free to GSM/3G operators. Register at  
[www.gsacom.com](http://www.gsacom.com)*