

3GPP PCG#13_10

GSMA Support for 3G and w-cdma

3GPP PCG#13
Seoul

Bill Best
GSM Association CTO
6th October 2004



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667 operator members
209 countries and territories

99.8% of the world's population live in
countries/territories that have licensed GSM and/or
3GSM

Approaching **1,150,000,000** users

“making wireless work globally”

- **Collective user experience**
 - Focus on inter-operability
 - E.g.: MMS, 3G video-calling
- **Protecting customers**
 - Offensive content
 - Unsolicited content
 - Phone theft
 - Protecting children





- First wave
 - 1.1bn users
 - Extensive success of messaging in the form of SMS
 - Positive impact on the world
 - Economic impact – Becoming one of the most important industries in the world (World Bank want to use coverage as economic indicator)
 - GSM US500bn industry by 2005*
 - GSM responsible for in excess of 3 million jobs globally*
- This is just the beginning



*Deutsche Bank White Paper 'GSM: Brilliant past, bright future.'

- GSMA initiative
 - reduce handset price barrier for low-income users
 - define reference design
- Operator involvement from:
 - Asia
 - India
 - Africa
 - Arab world
 - Latin America
 - Russia & Eastern Europe
- Concept can be extended to 3GSM in future





Connecting people to the world for the first time

- 6.5 billion people in the world, only 2bn have access to communications
- In the least penetrated countries, mobile accounts for 60-90% of connections
- Mobile users outnumber fixed in more than 120 countries
- The next billion communication connections will be dominated by mobile

We must plan and cooperate as an industry to identify where economies of scale can be found to deliver to the equipment people require



Connecting people to new services for the first time

– Networks

- Enhancing the delivery of services – 3GSM roll-out
- 70 networks by the end of the year
- AT&T launch means 3GSM is now live on three continents with Africa to come by early 2005

– Services

- Taking data services to new levels of quality with the seamless, secure and personal characteristics of the GSM family
- Encouraging the development of new services and encouraging new players in the value chain
- Embracing new revenue streams such as non-traffic services

We must plan and cooperate as an industry to deliver quality, interoperability and roaming



45

3GSM networks launched

23

Countries/territories on air

10

Million 3GSM users

70

3GSM networks launched by end '04

NB: Economies of scale in 2GHz band make 3GSM increasingly viable option for developing economies.



NTT
Do Co Mo



Telefonica
Móviles



TeliaSonera



TAIWAN CELLULAR CORP.



..... T-Mobile



maxis

KTF

telenor

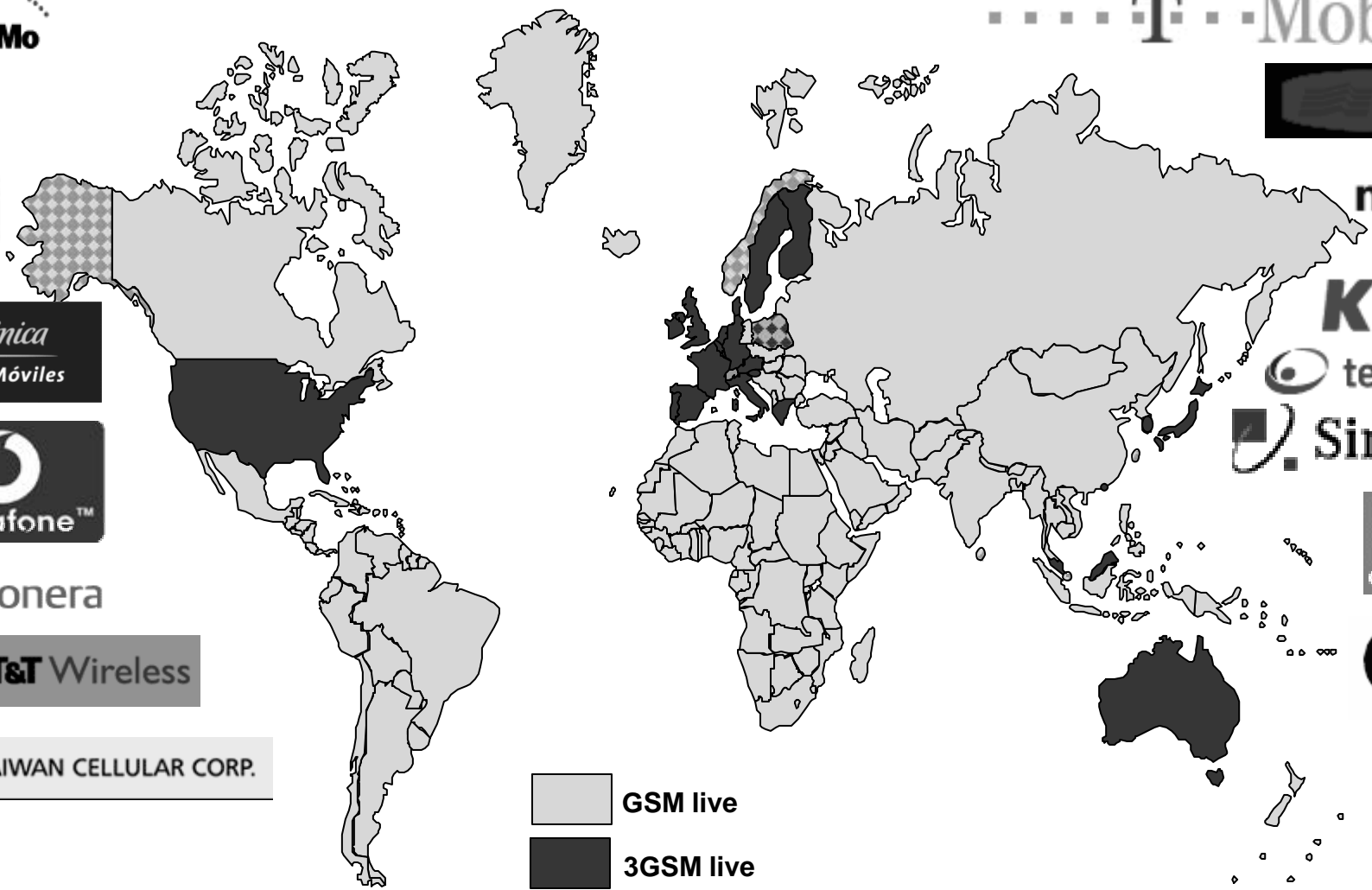
SingTel

orange

O2

اتصالات
Etisalat

GSM
ASSOCIATION



- GSM live
- 3GSM live
- 3GSM launch by Dec 04

“WCDMA [3GSM] terminals have the highest commercialisation level, and there are many handset vendors able to offer commercial WCDMA handsets. But for CDMA 2000, few companies in China can provide commercial handsets, even for internal tests.”

Interfax: China 3G Report, 2004



Video telephony



Animation



Video streaming



Video MMS



Online games



TV news clips

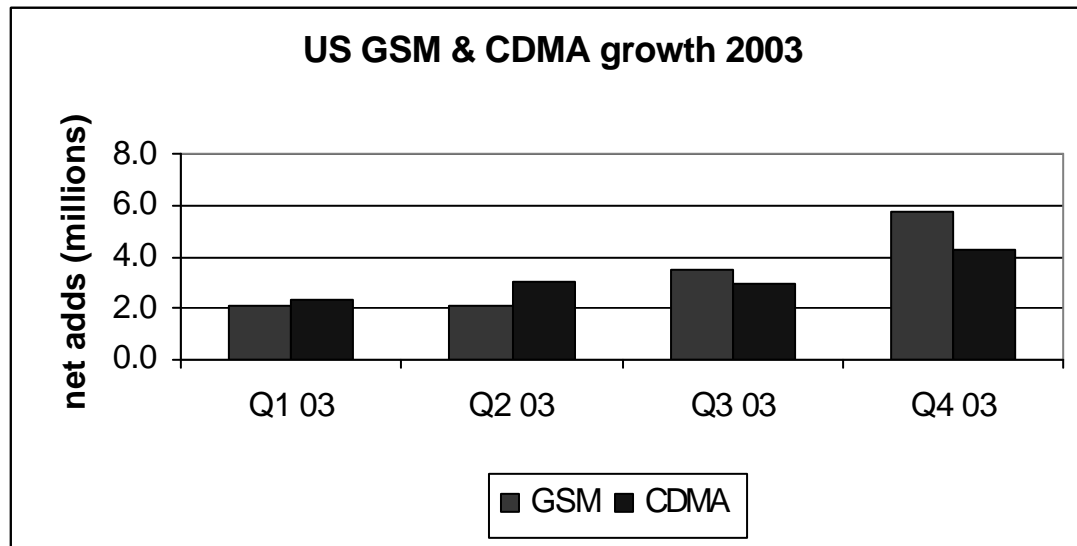


Audio streaming



- 3GSM is driving the emergence of high-speed mobile data connectivity
- Data-card services taking off in Japan and across Europe
- 3GSM operators have options to extend their broadband data offerings with HSDPA
- First HSDPA launches expected 12 months



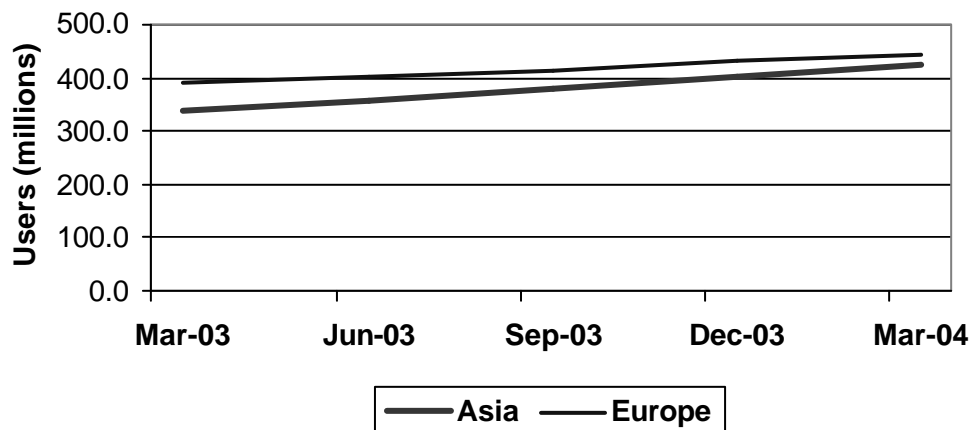


3GSM launched in 6 markets

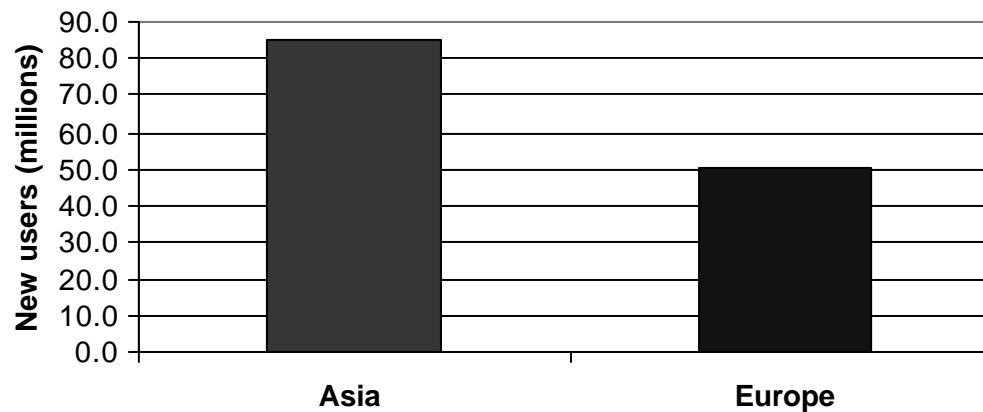


Atlanta 3GSM trial announced

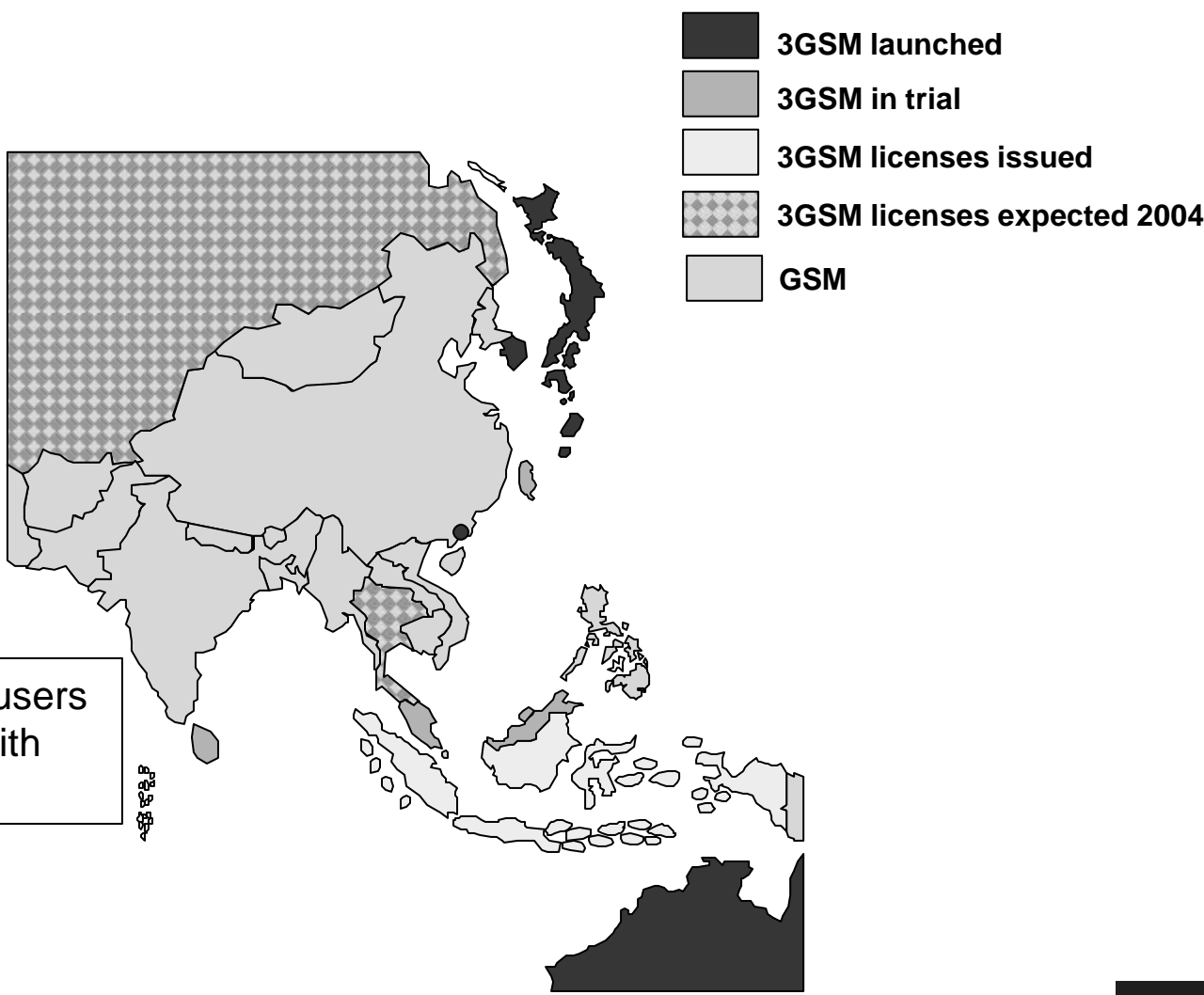
GSM in Asia and Europe compared



GSM growth in Asia & Europe (YT Mar 03)



● Japanese & Korean users
gain GSM roaming with
3GSM



- 275 million Chinese GSM users
 - More than 4 million new GSM users each month
- World's largest GSM operator – China Mobile
- World's 3rd largest GSM operator - China Unicom
- In 2003, Chinese GSM users
 - made 585.4 bn minutes of voice calls
 - sent 131 bn text messages



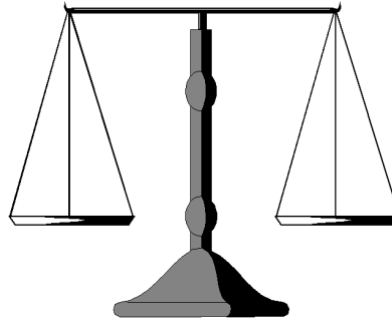
There are approx 75 million more GSM users in China than CDMA users worldwide



- MII's 3G trials reflect momentum and greater maturity of 3GSM

3GSM		CDMA 2000
5	Operators	3
200	Base stations	85
12	Network vendors	9
12	Handset vendors	2





3GSM

CDMA 2000

116 (40 already in service)	Committed operators	3 (Only 1 in service)
Clear & consistent	Evolution	Fragmented: DO or DV?
Globally compatible	Standard	Proprietary
Global mass market	Scale	Limited volume & niche

- User benefit at heart of GSM & 3GSM
- Demands inter-operability
- Promotes competition
- Generates economies of scale
- Creates a global opportunity
 - Infrastructure manufacturers
 - Handset vendors
 - Application developers





“Beijing welcomes friends from all over the world”



- GSMA and the TDS-CDMA Forum announce today an alliance
- Globally, many 3GSM operators have “unpaired” spectrum
- TD-SCDMA is a candidate technology for this spectrum – opportunities for China to export
- The Alliance is focused on maximising the synergies between 3GSM and TDS-CDMA as two compatible ‘brother’ technologies





Suntec International Convention & Exhibition Centre, Singapore
27th September - 1st October 2004



GSMA remains committed to support the 3GPP Project

GSMA offers thanks to all the hard working contributors to the project

GSMA is at the forefront of supporting w-cdma globally

Thanks for your time and attention

Bill Best

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