

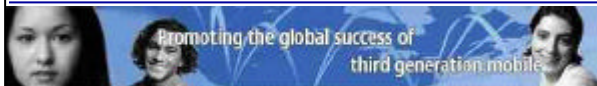


UMTS Forum Activities

Jean-Pierre Bienaimé

Chairman, UMTS Forum

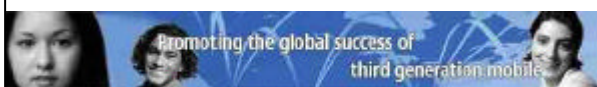
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ITU-BDT Sub-Regional Seminar on IMT -2000 for CEE and Baltic States, Ljubljana 1-3 December 2003

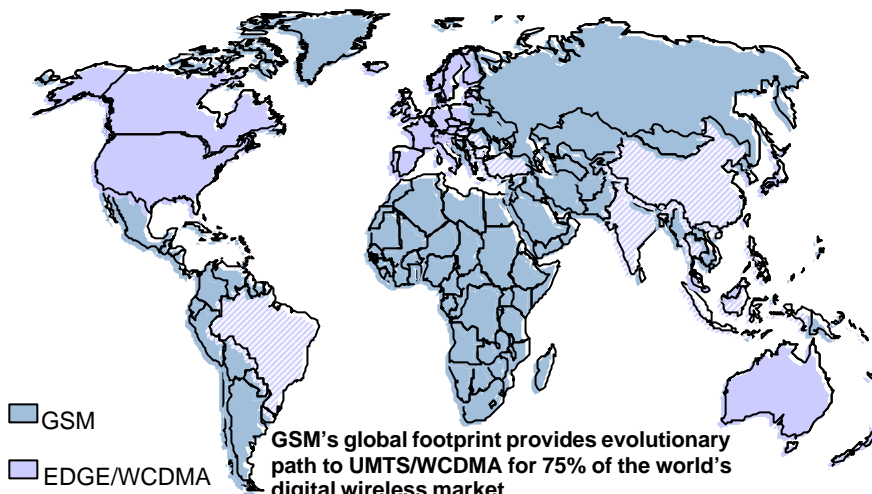


1. UMTS Status Update



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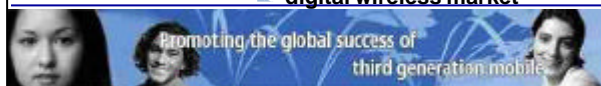
Markets committed to GSM evolution (EDGE & UMTS)



■ GSM

■ EDGE/WCDMA

GSM's global footprint provides evolutionary path to UMTS/WCDMA for 75% of the world's digital wireless market



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7 of the world's 10 biggest operators have already selected UMTS/WCDMA

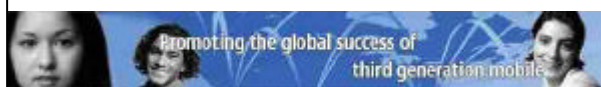


There are 500 + Mobile Operators in the world today
 Concentration: 20 largest operators ~65% of subscriptions
 10 largest operators ~51% “ “

June 2003 (EMC)

10 largest Operators Subscriptions (million), *50% or more - majority owned

China Mobile	150.1	GSM	→	open
Vodafone	90.2	GSM	→	UMTS/ WCDMA
China Unicom	79.8	GSM/CDMA	→	open
T-Mobile	63.8	GSM	→	UMTS/ WCDMA
Orange	42.0	GSM	→	UMTS/ WCDMA
NTT DoCoMo	50.1	PDC	→	UMTS/ WCDMA
TIM	21.0	GSM	→	UMTS/ WCDMA
Verizon Wireless	34.1	CDMA	→	CDMA2000
Telefonica	23.0	GSM	→	UMTS/ WCDMA
Cingular Wireless	22.1	GSM/TDMA	→	UMTS/ WCDMA



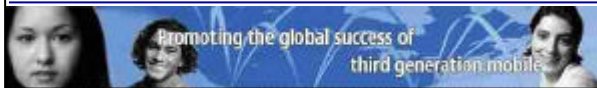
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3G license awards per country



More than 95% of 3G licensees have selected UMTS

6	5	4	3	2	1
Australia	Canada	Denmark	Belgium	Czech Rep	Guernsey
Austria	Italy	Finland	Estonia	Latvia	Isle of Man
Germany	Netherlands	Hong Kong	France	Liechtenstein	Monaco
	New Zealand	Luxembourg	Greece	Malaysia	Slovenia
	Taiwan	Norway	Ireland	Malta	
	UK	Portugal	Israel	Åland	
		Spain	Japan		
		Sweden	Poland		
		Switzerland	Singapore		
			Slovak Rep		
			South Korea		



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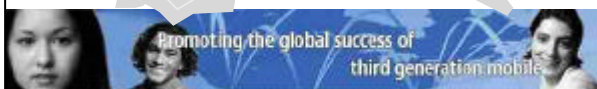
UMTS Markets in Western & Central Europe



- Austria
- Belgium
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Guernsey
- Ireland
- Isle of Man
- Italy
- Latvia
- Liechtenstein
- Luxembourg
- Malta
- Monaco
- The Netherlands
- Norway
- Poland
- Portugal
- Slovenia
- Slovak Republic
- Spain
- Sweden
- Switzerland
- UK
- Åland

More than 80 operators in 27 European markets have chosen UMTS/WCDMA as their 3G standard

Upcoming
 Bulgaria
 Croatia
 Cyprus
 Hungary
 Lithuania
 Romania

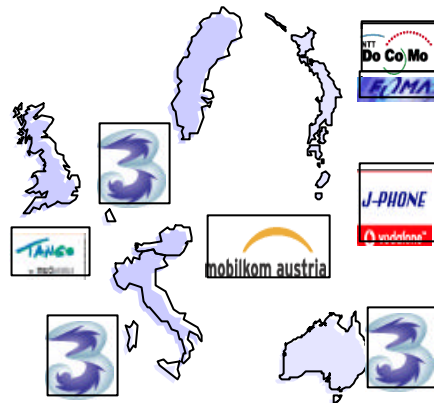


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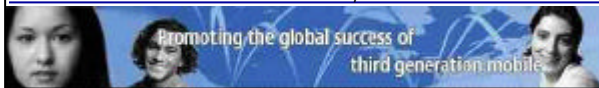
UMTS/ WCDMA in Europe and outside



Sept 2003	Subscr	%/m
DoCoMo FOMA	1000 k	28
Vodafone KK	84 k	11
3 Italy	374 k	19
3 UK	195 k	19
3 Australia	69 k	23
3 Sweden	12 k	26
3 Austria	8 k	23
Mobilkom (Aus)	2 k	3
Tango (Lux)	1 k	
Total	1745 k	24

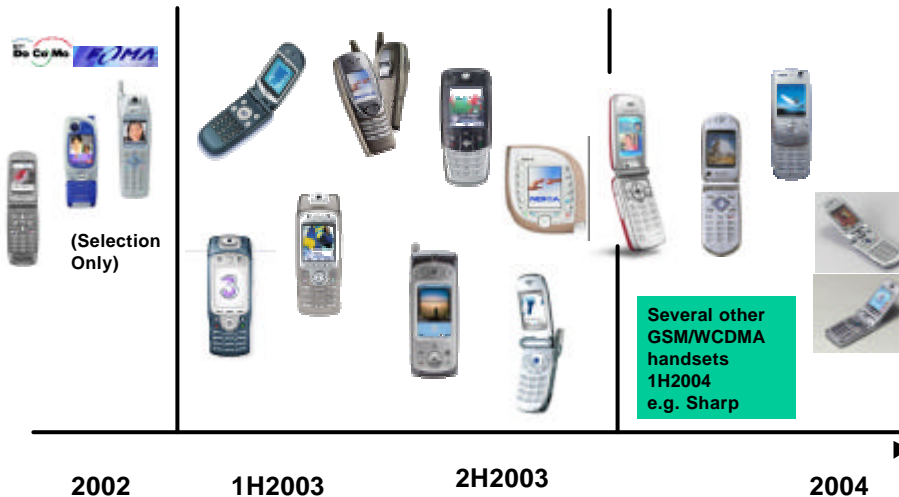


Source: EMC Research + External reports



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UMTS/ WCDMA Terminal Availability



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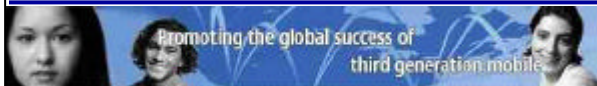
First mover in Europe



- **Italy**
374,000 subscribers, adding 2000 new subs/day, (Sept)
Terminal suppliers: NEC and Motorola
3200 cell sites (50% population coverage)
Non-voice services account for 11% of ARPU
- **UK**
195,000 subscribers (Sept)
Terminal suppliers: NEC and Motorola
4300 cell sites (70% population coverage)
Non-voice services account for 15% of ARPU
- **Sweden**
12,000 subscribers (Sept)
950 cell sites
- **Austria**
8,000 subscribers (Sept)
- **Denmark**
Network rollout underway, anticipating commercial launch before end 2003

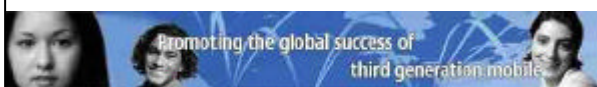


Other European operator announcements aligned in 2003/2004 timeframe



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2. UMTS Forum Activities



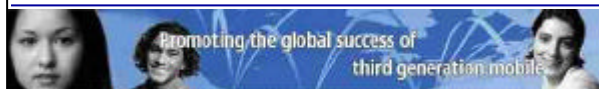
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What Is The UMTS Forum?



Mission, Membership & Structure

- To promote a common vision of the development of UMTS and to ensure its worldwide success
- An international industry body – comprising operators, manufacturers, regulators, application developers, research organisations and IT industry players from 40 countries worldwide
- Organisational Structure: 3 General Assemblies, 6 Steering Groups, 6 Administration Meetings and 6 Communications Meetings per year

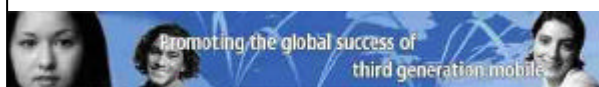


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Role of The UMTS Forum



- To express a strong, unified industry voice through lobbying and promotional actions
- Regular publication of reports and statements on key topics including technology, spectrum, regulation, market and services
- To influence international bodies, administrations and financial community on spectrum issues, (e.g. including UMTS traffic characteristics)
- Forging successful partnership with other institutions and industry associations, including: ITU, ETSI, 3GPP, GSMA, 3G Americas
- Communication targeted at national administrations, regulators, the media and financial communities



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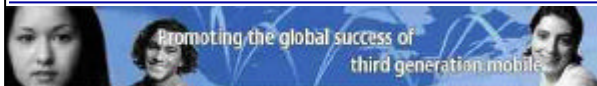
Objectives & Activities 2003



To present objective information regarding UMTS to the financial community through dialogue with investors, analysts, press and opinion formers

SPECIFIC ACTIVITIES....

- Personal meetings and roundtables with analysts, fund managers, financial journalists and national press writers e.g London (May / June 2003); Paris (May, July); Rio (June, November); Beijing (September); Geneva (October); Prague (October); Bangkok (November); New York (December)
- Ad hoc briefings with political figures, regulators, institutions etc
- International PR and media relations profile maintained via London agency and local offices



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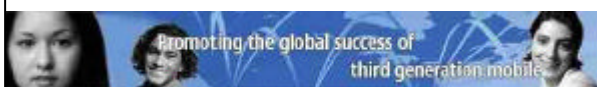
Objectives & Activities 2003



To provide objective, accurate information about UMTS to ensure positive engagement and reporting on the progress of UMTS/WCDMA worldwide; e.g. deployments, launch news, contract announcements

SPECIFIC ACTIVITIES....

- Visibility in conferences and other regional events (Europe, Asia, Americas): more than 65 events supported or endorsed during 2003
- Publication of reports and studies: Mobile Evolution White Paper; WLANs and TDD; WLAN Spectrum; Security; IMS; 3G Traffic Characteristics; Social Shaping ("Preparing for the 3G Customer"); mTLD; Settlements and Billing; Feasibility and Costs (in development)
- Mobilennium Express weekly newsletter distributed free to registered readers; announcement of industry news and developments via UMTS Forum web site



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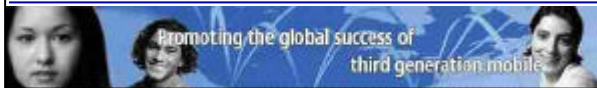
Objectives & Activities 2003



To address and respond to regional priorities (e.g. 3G licensing process; spectrum allocation issues)

SPECIFIC ACTIVITIES....

- Brazil: Dialogue with ANATEL and Ministry of Communications regarding 1.9GHz band (March 03) and award of licenses (Jun & Nov 03); participation in European Commission @LIS Project
- China: Organisation of roundtable / seminar in Beijing (Sept) in association with Chinese authorities (MII, MOST, BUPT, CATR); ongoing contact with administration and operators
- Maghreb: Seminar UMTS Forum / ETSI / Regulatory Authority of Morocco (Casablanca April 03)
- Eastern Europe: Seminar "UMTS in the Extended European Union and Neighbouring Countries" (Prague, October) organised with regional operators and regulators



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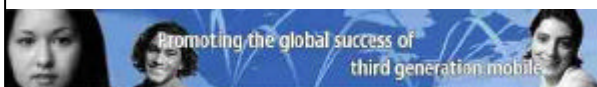
Objectives & Activities 2003



Partnering and promotional activities around World Radiocommunication Conference (WRC 2003, June) and other international interests (European Commission, ITU...)

SPECIFIC ACTIVITIES....

- WRC '03: presentation of UMTSF key messages on future spectrum needs for IMT-2000
- Regular participation of UMTSF Spectrum Aspects Group in work of ITU-R
- Regular participation in ITU-T (e.g. Informal Forum Summit, San Francisco)
- Regular involvement in ITU-D Regional Seminars
- Active co-operation with ETSI (Marocco Congress, m-commerce workshop) and 3GPP (Market Representation Partner, presence at PCG)
- EC: participation in @LIS Programme for Latin America; proposals regarding UMTS in Europe and other regions



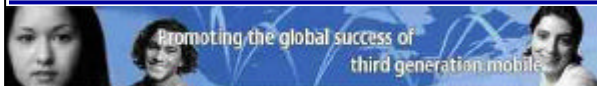
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Activities: IMT-2000 Spectrum

Spectrum Aspects Group



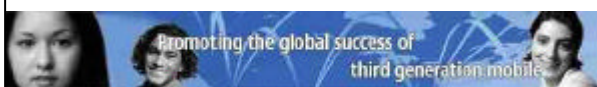
- Spectrum Aspects Group (SAG) studies availability and harmonisation of global spectrum for IMT-2000 and beyond
- Traffic characteristics studies for IMT-2000 spectrum, including a review of utilisation studies on terrestrial and satellite spectrum
- Influence ITU-R WP8F and regional groups (CEPT ECC PT1) regarding harmonised frequency arrangements for UMTS
- Ongoing studies re. WLAN spectrum for regions e.g. Latin America
- Lobbying inputs to CISPR regarding noise emission limits across GSM1800/UMTS bands
- Key Messages to World Radiocommunication Conference 2003:
 - Assessment by WRC '07 of spectrum needs for evolution of IMT-2000
 - Band 2.5-2.7 GHz identified by WRC '00 for IMT-2000 on a global basis needs to be unconstrained by interference from Broadcasting Satellite Systems (BSS)



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For more information...

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