



Making Spectrum Policy forward looking and proactive

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Who is The GSMA?

THE GSMA
WAS FOUNDED IN
1987

15 OFFICES
WORLDWIDE



SHANGHAI



SAN FRANCISCO



BEIJING



SAO PAULO



NAIROBI



NEW DELHI



LONDON



DUBAI



ATLANTA



BRUSSELS



BARCELONA



HONG KONG



BRASILIA



BUENOS AIRES

Connecting Everyone and
Everything to a #BetterFuture



The mobile industry is the
first to formally commit
to the UN Sustainable
Development Goals



The GSMA
represents the
interests of
mobile
operators
worldwide



MORE
THAN
750
MOBILE
OPERATORS



WITH OVER
350
COMPANIES
in the broader mobile ecosystem



The world's leading mobile industry events,
Mobile World Congress and Mobile World
Congress Shanghai, together attract nearly

190,000

The GSMA works to deliver a regulatory environment
that creates value for consumers by engaging
regularly with:



MINISTRIES
OF TELECOMS



TELECOMS
REGULATORY
AUTHORITIES



INTERNATIONAL &
NON-GOVERNMENTAL
ORGANISATIONS



CONNECTING
23,000+
Industry Experts

Exclusively for GSMA Members,
InfoCentre² is your place to
connect with a global
community of industry experts

GSMA Working Groups
provide frameworks and
standards in commercial,
operational and
technical matters that help
maintain and advance
mobile industry ecosystems



8.7 bn+

MOBILE CONNECTIONS
WORLDWIDE



Regional Events



MOBILE 360 SERIES

REGIONAL FOCUS • GLOBAL IMPACT

GSMA Mobile 360 Series presents a conference platform cultivating regional engagement through topics that are impacting the mobile industry on both a localised and global scale. Senior executives in mobile and adjacent industry verticals come to learn and discuss in detail their challenges and successes, as well as network with peers.

Africa

Digital Societies

Europe

Latin America

MENA

Eurasia – Moscow, 8-9 October 2019

Privacy & Security

West Africa



GSMA's Spectrum Programme

VISION

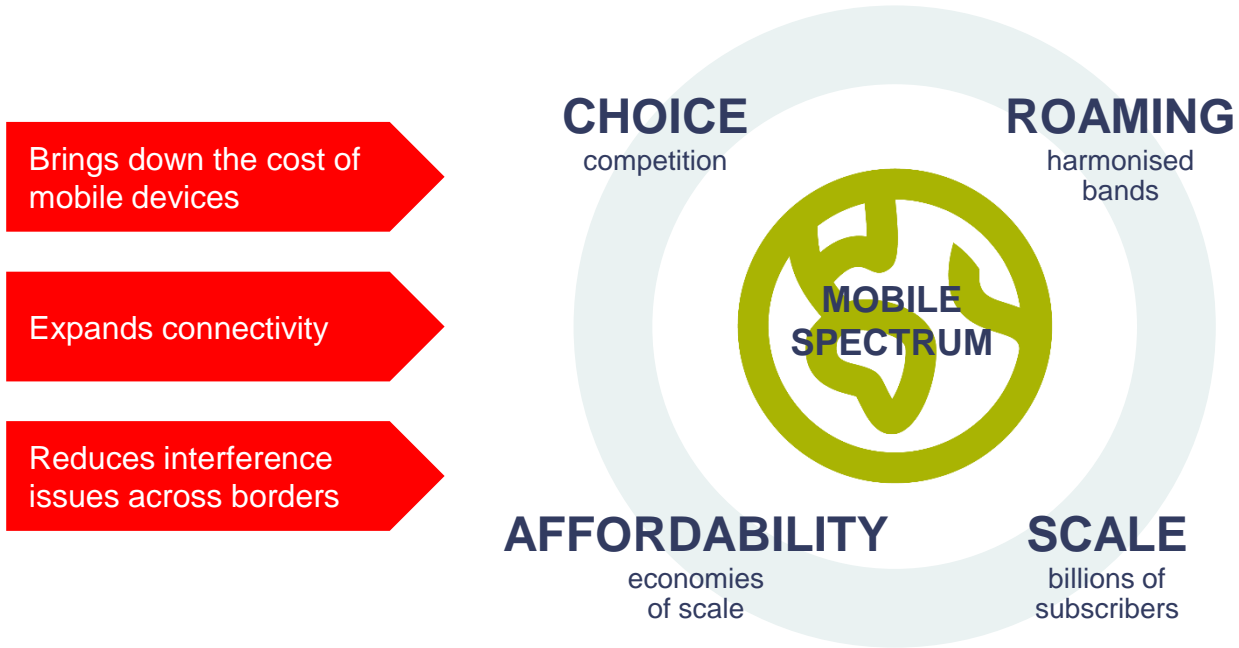
Advocate for timely, affordable and fair access to a sufficient amount of spectrum to connect more people and meet rapidly rising data demand

OBJECTIVE

Work with operators, regulators and international organisations to facilitate access to high-speed, high-quality mobile broadband services and connect everyone and everything to a better future



Positive Impact of Spectrum Harmonisation

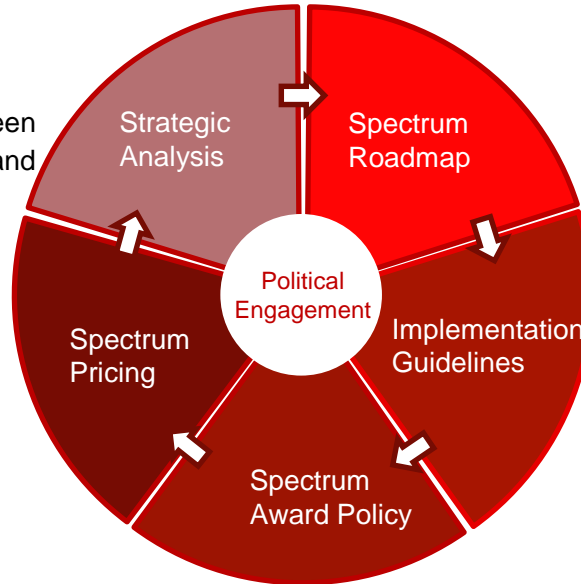


Spectrum Management Lifecycle

- The evolution of consumer and technology trends impacts spectrum requirements
- Output: Advocacy surrounding the gap between current spectrum availability and future demand

- High spectrum prices are damaging consumers and broadband development
- Output: Fair, market based spectrum pricing allowing mobile operators to deploy

- Spectrum policy impacts the coverage, capacity and cost of mobile services
- Output: Provide guidance for transparent and fair access to spectrum (e.g. auctions) and licensing conditions and renewal



- A spectrum roadmap aids planning to support mobile broadband expansion and evolution
- Output: Mid/long-term roadmap (>5yrs) including spectrum release timing

- Practical implementation guidelines are needed for each band
- Output: Harmonised band plans (e.g. L-band and harmonised 700 MHz) and process for clearing the bands



Spectrum Roadmaps – Why They Matter

Creating and maintaining a clear spectrum roadmap is key to successful a policy

- Deciding what spectrum bands are to be cleared and licensed over the coming years helps provide visibility for mobile operators as they plan future network developments;
- The visibility, clarity and predictability that roadmaps offer is also crucial to the wider mobile ecosystem;
- For incumbent users, they afford a chance to plan whether to relocate existing services.



Key Themes for Spectrum Roadmaps

- Emerging challenges and opportunities to radio spectrum management framework and approach, at least 3 – 5 years into the future
- Identify future technological trends and drivers, and assess their impact on spectrum policy and planning
- Spectrum management work projects and programme planned to address the identified challenges and opportunities
- A roadmap is an evolving document, to be reviewed and updated regularly (an annual review is recommended)



Six More Steps to Think About

1. Use awards only when appropriate and necessary
2. The supply of spectrum should not be limited to create artificial scarcity
3. Award all spectrum in open, transparent and non-discriminatory processes
4. Licence conditions should be used with caution
5. Have a clear and timely award process
6. Adopt an award design that can deliver an efficient outcome with minimal uncertainty



Hot Topics: Spectrum Pricing

The GSMA has consistently encouraged policy makers to be genuine leaders and chose the path of digital economic prosperity and connectivity for Europe, by sacrificing immediate and short term financial gains of higher prices in exchange of much higher growth potential and ultimate revenue down the line



**Poorer
coverage**



**More expensive
services**



**Slower
speeds**



Spectrum pricing study highlights increases

Across a sample of

32 COUNTRIES

15 had costs above the median for their peer group

i.e. higher, medium and lower income countries

The lost economic gains across these countries amounted to

\$445bn 

The net economic gain from lower spectrum prices would be

\$253bn

or \$118 per person

*“Governments and regulators **must fully appreciate** their ability to maximise - or thwart - their digital futures through spectrum pricing”*



Brett Tarnutzer
Head of Spectrum, GSMA

The road to success in four steps



Set modest reserve prices and annual fees, and rely on the market to set prices



License spectrum as soon as it is needed, and avoid artificial spectrum scarcity



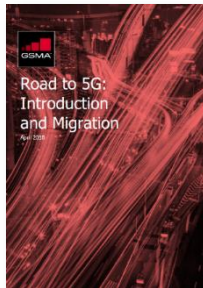
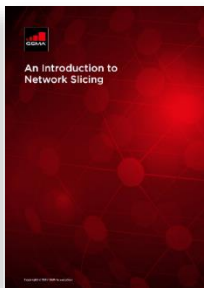
Avoid measures which increase risks for operators



Publish long-term spectrum award plans that prioritise welfare benefits over state revenues.



Learn more about making the most of 5G



<https://www.gsma.com/futurenetworks/technology/understanding-5g/>

<https://www.gsma.com/spectrum/5g-spectrum-guide/>