

# **LTE Market Reality**

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Global mobile Suppliers Association (GSA)



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Global mobile Suppliers Association @ 2010

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### **Global mobile Suppliers Association**

 Representing leading GSM/EDGE, WCDMA-HSPA, LTE suppliers globally
 Promoting GSM/EDGE/WCDMA and evolved systems for successful delivery of mobile broadband, enhanced multimedia, voice services
 3GPP Market Representation Partner

Facts-based research by GSA Leveraging strong links in the industry Objective analysis GSA surveys, reports, regular updates

**LTE Operator Commitments** 

HSPA network deployments/launches

WCDMA Network Launches

HSPA Devices availability

Services and Applications

**Environment and sustainability** 

EDGE Operators Worldwide

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Mobile Broadband Growth reports

**UMTS 900 Global Status** 

HD voice

**Evolution of Network Speeds** 

**Mobile Broadband Spectrum** 

**EDGE Evolution** 

HSPA Evolution (HSPA+)

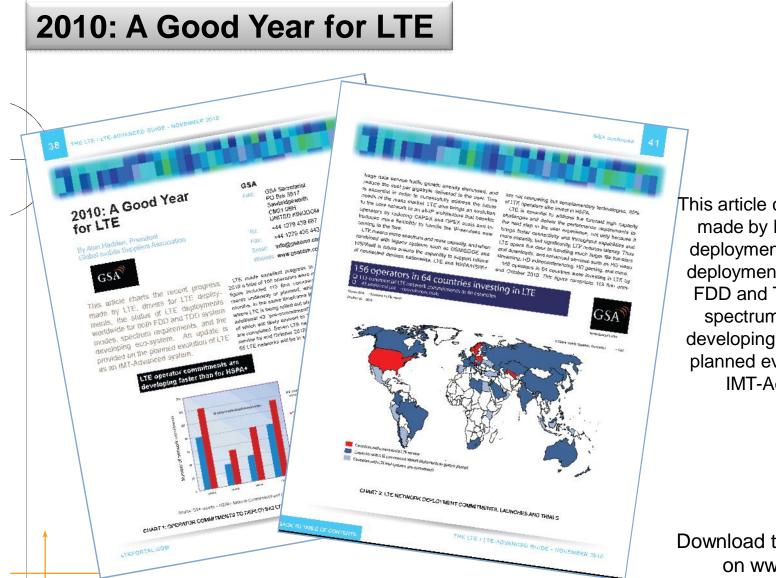
**Spectrum – including Digital Dividend** 

60+ charts, maps

FAST FACTS (regularly updated) www.gsacom.com/news/gsa\_fastfacts.php4









This article charts recent progress made by LTE, drivers for LTE deployments, the status of LTE deployments worldwide for both FDD and TDD system modes, spectrum requirements, the developing eco-system, and the planned evolution of LTE as an IMT-Advanced system

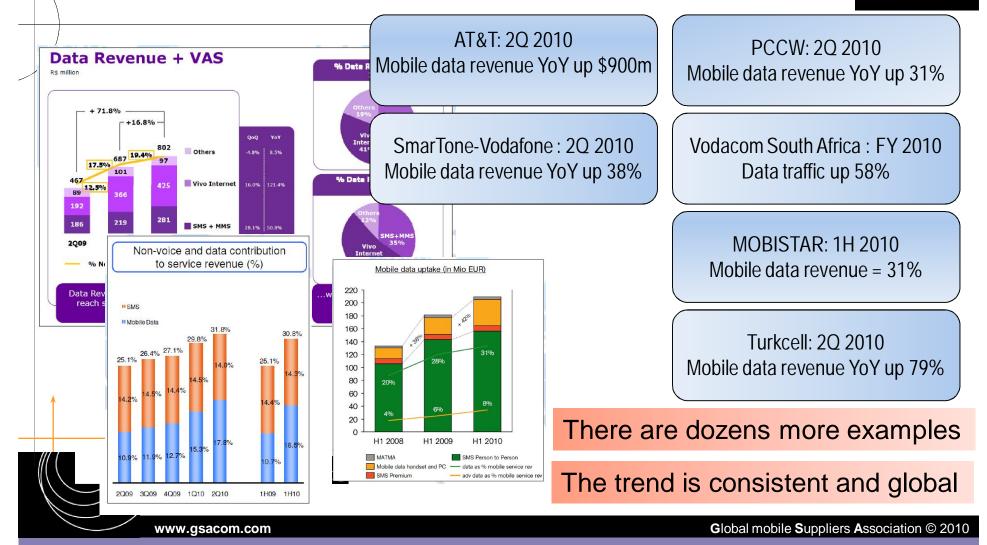
Download the article via the link on www.gsacom.com

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## Mobile broadband success stories globally

### Traffic, revenue, profit growth across the world

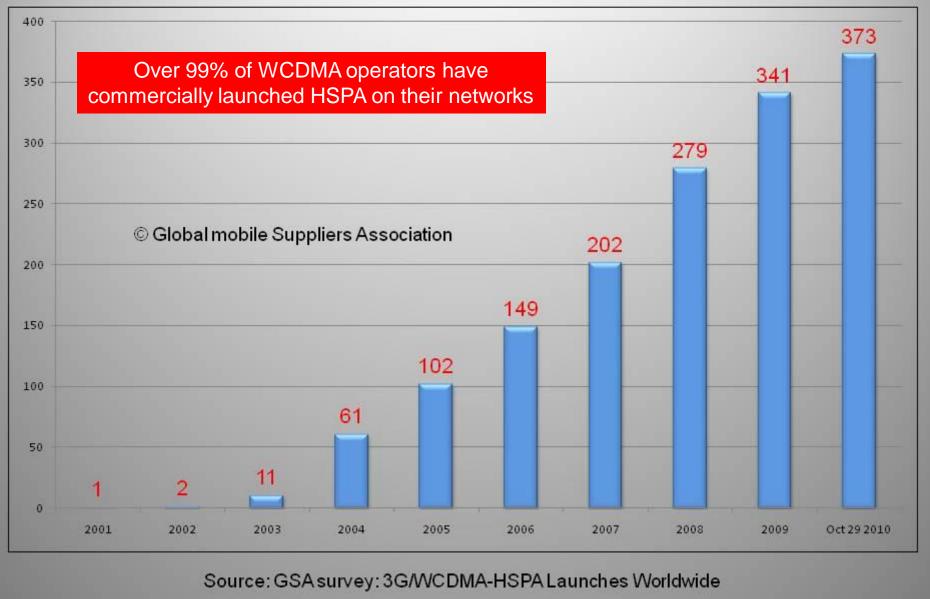




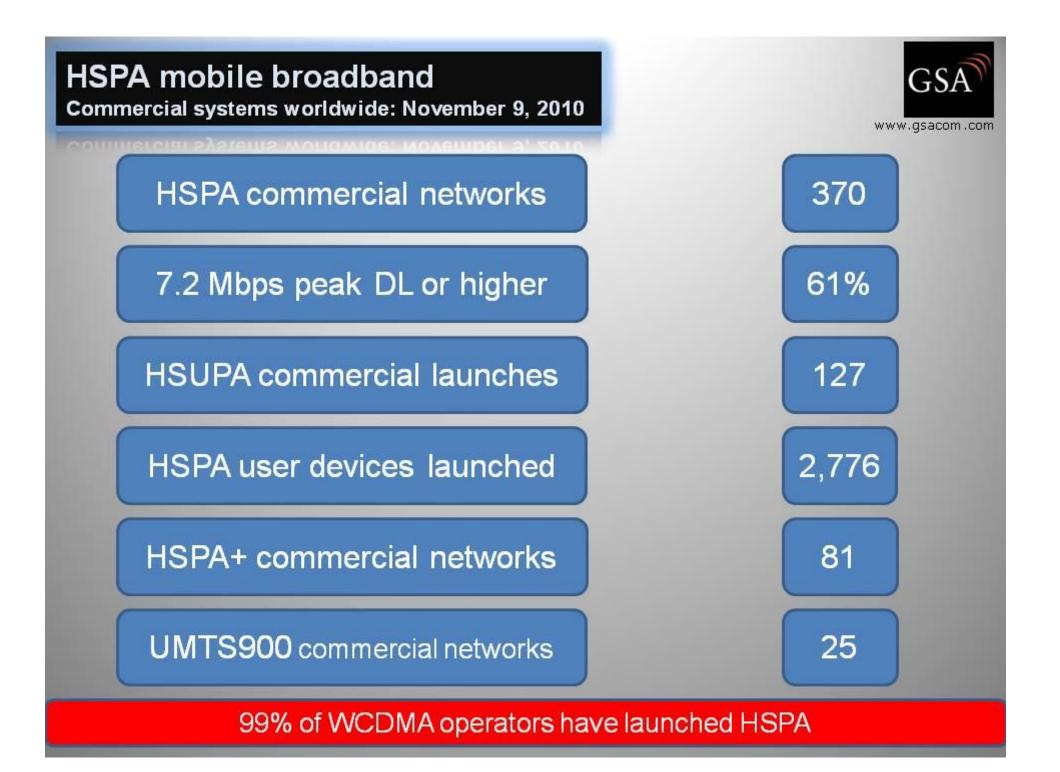
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### WCDMA: cumulative network launches worldwide October 29, 2010





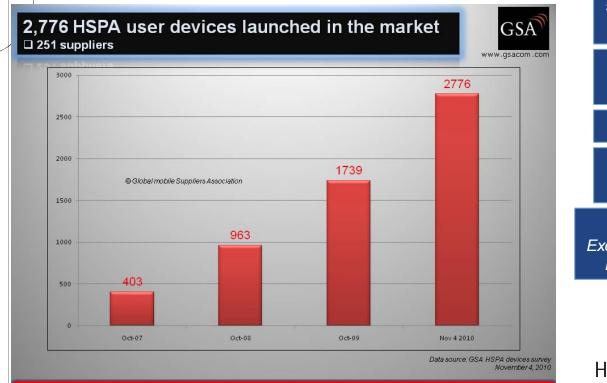
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### HSPA mobile broadband eco-system - mainstream

2,776 HSPA devices launched by 251 suppliers
 1000+ HSPA devices launched in past year; 60% annual growth





More than 1,000 new HSPA user devices launched in past 12 months



GSA HSPA Devices Survey Key Findings – November 4, 2010 www.gsacom.com

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57% of devices support peak DL data speed of at least 7.2 Mps

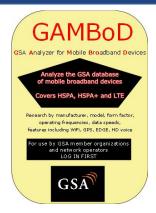
825 HSUPA devices -and the majority support 5.8 Mbps

68 HSPA+ devices

Smartphones (i.e. HSPA with WiFi) is the main growth device segment

480 UMTS900 (HSPA) devices Excluding notebooks and e-book readers, 21% of HSPA devices operate in the 900 MHz band

HSPA, HSPA+ and LTE devices analysis tool (for GSA members and network operators)



Global mobile Suppliers Association  $\ensuremath{\textcircled{O}}$  2010



### HSPA+ is the main trend in 2010

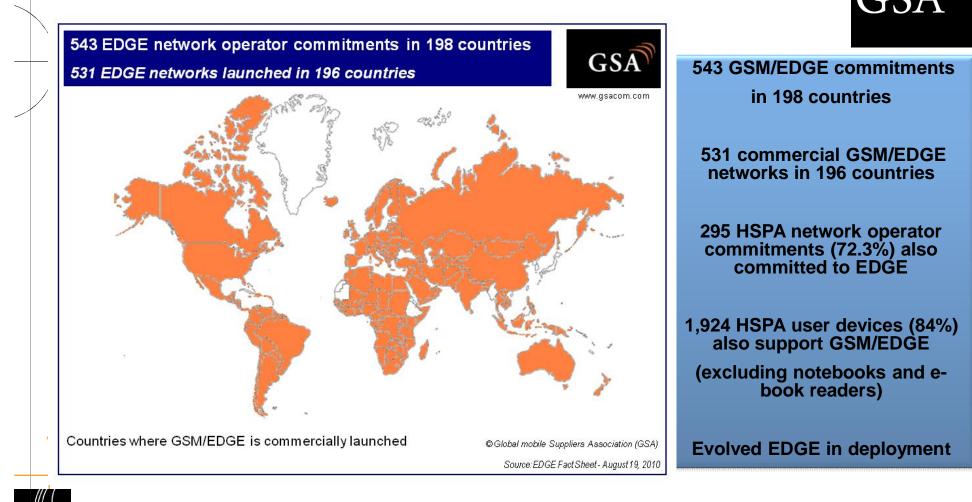
136 operators in 63 countries have committed to HSPA+ network deployment
 More than 1 in 5 HSPA operators have commercially launched HSPA+
 HSPA+ has a strong evolution path

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# EDGE contributes to mobile broadband success



#### Source: GSA EDGE Fact Sheet - August 19, 2010

www.gsacom.com/gsm\_3g/edge\_databank.php4#EDGE\_Fact\_Sheet

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# The industry direction is to LTE

- LTE is needed to accommodate huge traffic growth



Mobile broadband is gaining momentum from widespread 3.5G deployments, flat rate data tariffs, and availability of internet friendly mobiles

Traffic rising/revenue falling

40x – 100x traffic increase May need to be supported across several frequency bands

LTE is essential to take mobile broadband to the mass market

#### Year 2010: LTE performance

Peak downlink: > 150 Mbps Typical user speed: 10-30 Mbps Typical user UL rate: 5-50 Mbps

Spectrum flexibility Can use new or re-farmed spectrum, FDD and TDD Variable channel bandwidth

Improved performance Higher capacity, peak and user data rates Higher bandwidth Much lower latency "always on"; enhanced user experience

#### Lower cost

IP-based flat network architecture; Low OPEX High degree of self configuration/optimization High re-use of assets including sites

Complements 3G/HSPA Addresses high capacity requirements Seamless service continuity/multimode devices Next generation solution for 3GPP and 3GPP2

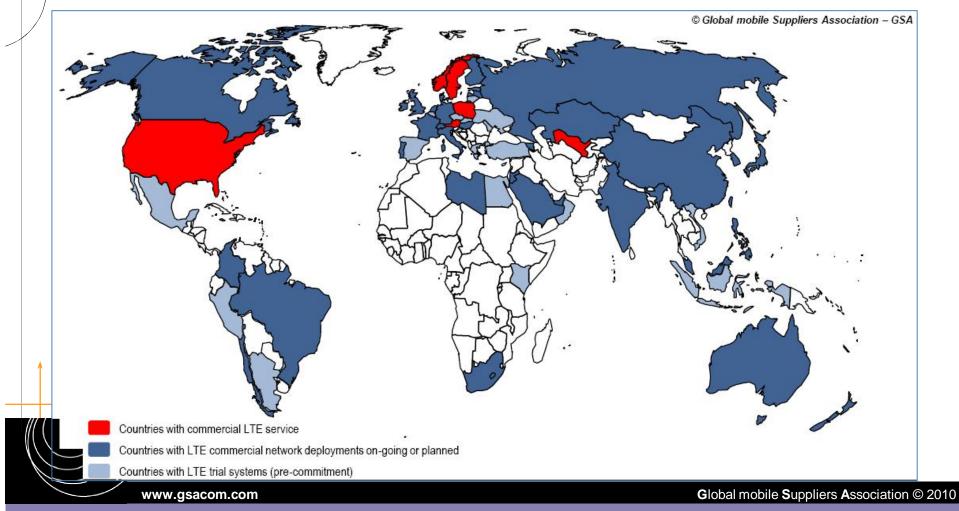


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156 operators in 64 countries investing in LTE

113 commercial LTE network commitments in 46 countries
 10 LTE networks commercially launched
 43 additional pre-commitment trials



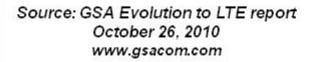


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Country	Operator	Expected launch
Norway	TeliaSonera	Launched 15.12.09
Sweden	TeliaSonera	Launched 15,12,09
Uzbekistan	MTS	Launched 28.07.10
Uzbekistan	UCell	Launched August 2010
Poland	Mobyland and CenterNet	Launched 07.09.10
USA	MetroPCS	Launched 21.09.10
Austria	Mobilkom Austria	Launched 19.10.10
Armenia	Vivacell-MTS	2010
Canada	Telus	2010
Canada	Bell Canada	2010
Finland	TeliaSonera	2010
Germany	Doutsche Telebam	2010
Japan	NTT DoCoMo	2010
Japan	Emobile	2010
Russia	Yota	2011 0 1860 000
Sweden	TeleNor Sweden	2010
Sweden	Tele2 Sweden	2010 AT KOUSNIN
USA	CenturyTel	no en van
USA	Verizon Wireless	2010 2010
UAE	Etisalat	sited Ne.
Canada	Rogers Wireless	010-11
China	China Mobile	2010-11
Germany	Vodafone	2010-11
Hong Kong	PCCW	2010-11
Hong Kong	CSL Limited	2010-11
USA	Cox Comms	2010-11
South Africa	Vodacom	
Canada	Shaw Communications	2011 2011
Colombia	UME EPM	2011
Denmark	3 Denmark	2011
the second se	TDC	2011
Denmark		
Denmark	TeleNor	2011
Denmark	Tella Danmark	2011
Germany	O2 (Telefonica)	2011
India	Qualcomm India LTE	2011
	Venture	
Ireland	Hutchison 3	2011
Japan	Softbank Mobile	2011
Jordan	Zain	2011
Portugal	TMN	2011
Portugal	Vodafone Portugal	2011
Russia	Rostelecom	2011
South Korea	LG Telecom	2011
South Korea	KT	2011
South Korea	SK Telecom	2011
Switzerland	Orange	2011
Switzerland	Swisscom	2011
USA	AT&T Mobility	2011
USA	Aircell	2011
USA	BayRICS	2011
Austria	T-Mobile	2011-12
Austria	Hutchison 3	2011-12 2011-12
Austria	Orange	2011-12
France	Orange	
Japan	KDDI Chunghwa Telecom	2012
Taiwan		2012
Malaysia Australia	DiGi Optus	
		To be confirmed To be confirmed
Australia	Telstra	
Australia	VHA	To be confirmed To be confirmed
Bahrain	Zain	
Brazil	Vivo	To be confirmed
Canada	MTS Allstream	To be confirmed
Canada	Sasktel	To be confirmed
Chile	Entel PCS	To be confirmed
Chile	Movistar	To be confirmed

### 113 LTE network commitments, 46 countries

01.1		· · · · · · · · · · · · · · · · · · ·
China	China Telecom	To be confirmed
Estonia		To be confirmed
Estonia	dense	To be confirmed
Nes. ISN.	DNA	To be confirmed
nonjor	Elisa	To be confirmed
yn der.	SFR	To be confirmed
revinany	E Plus	To be confirmed
Estonia Estonia Finiage Como ( Mangel	SmarTone-Vodafone	To be confirmed
Kong Kong	Hutchison 3 China Mobile	To be confirmed
Hong Kong	China Moone	To be confirmed To be confirmed
Hungary	Telenor Magyarország Telecom Italia	To be confirmed
Italy	Wind	To be confirmed
Jamaica	Claro	To be confirmed
Jersey	Clear Mobitel	To be confirmed
Kazakhstan	Kcell	To be confirmed
Kuwait	Zain	To be confirmed
Latvia	Bite	To be confirmed
Latvia	Tele2	To be confirmed
Latvia	LMT	To be confirmed
Libya	Al Madar	To be confirmed
Malaysia	Asiaspace	To be confirmed
Netherlands	KPN	To be confirmed
Netherlands	Vodafone	To be confirmed
Netherlands	T Mobile	To be confirmed
Netherlands	Ziggo 4	To be confirmed
	Tele2	Construction of the Association
Netherlands		To be confirmed
New Zealand	Telecom NZ	To be confirmed
New Zealand	Vodafone NZ TeleNor	To be confirmed To be confirmed
Norway	Pitel	
Philippines Russia	Svyazinvest	To be confirmed To be confirmed
Saudi Arabia	Zain	To be confirmed
Saudi Arabia	STC	To be confirmed
Saudi Arabia	Etisalat (Mobily)	To be confirmed
Singapore	M1	To be confirmed
Singapore	SingTel	To be confirmed
Singapore	StarHub	To be confirmed
South Africa	Cell C	To be confirmed
UK	Vodafone	To be confirmed
USA	Cellcom	To be confirmed
USA	Cellular South	To be confirmed
USA	Lightsquared	To be confirmed
USA	T-Mobile USA	To be confirmed
USA	Commnet Wireless	To be confirmed
USA	Leap Wireless	To be confirmed
USA	Texas Energy Network	To be confirmed
USA	Public Service Wireless	To be confirmed





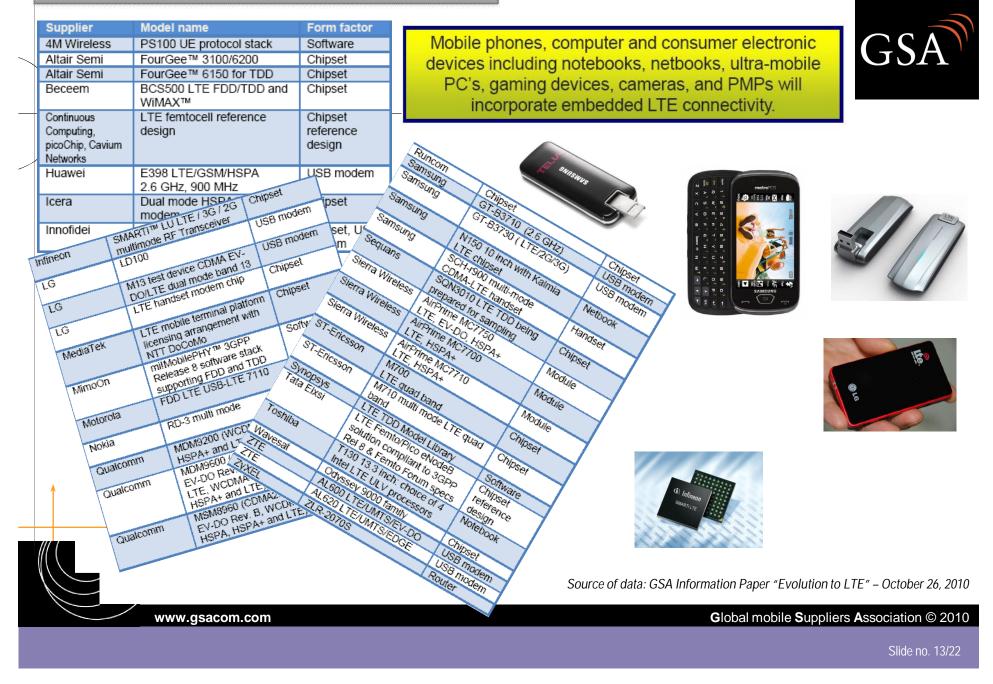


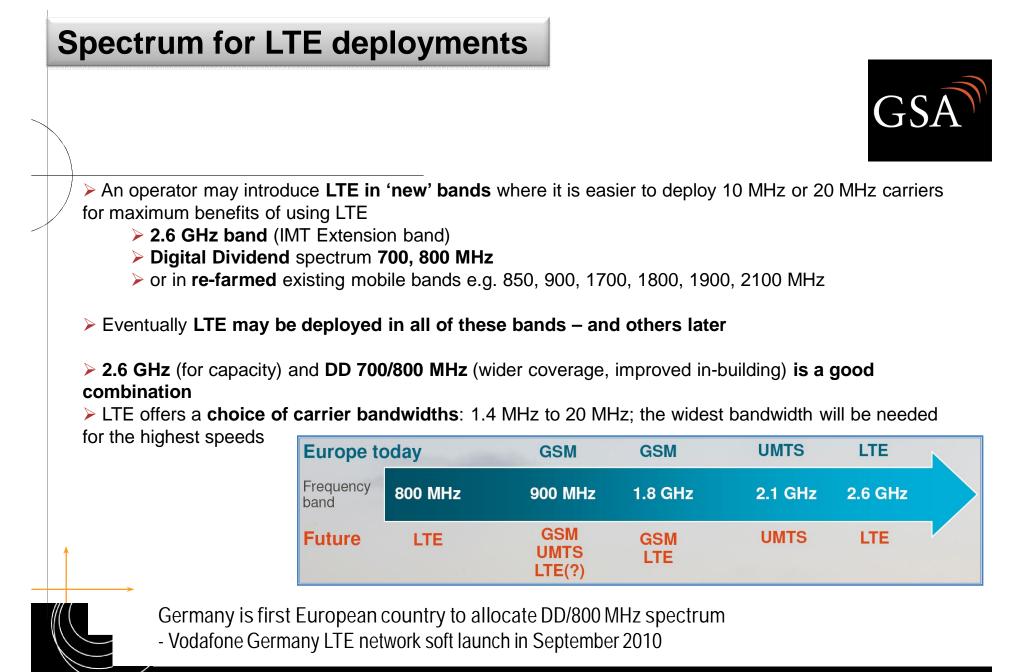
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### 43 pre-commitment trials

	Operator	
Argentina	Telefonica	
Argentina	Personal	
Belgium	Mobistar	
Belgium	Telenet	
Brazil	Telefonica	
Czech Republic	O2 (Telefonica)	
France	Bouygues Telecom	
Egypt	Vodafone	
Greece	Cosmote	
Hungary	Magyar Telekom (T-Mobile)	
Indonesia	Telkomsel	
Indonesia	XL Axiata	
Indonesia	Indosat	
Latvia	Bite	
Latvia	Triatel	
Lithuania	Bite	
Lithuania	Omnitel	
Kazakhstan	Vimpelcom	_
Kenya	Safaricom	
Malaysia	Maxis	
Malaysia	Celcom	
Mexico	Telcel	
Mexico	Telefonica	_
Moldova	Orange Moldova	
Oman	Omantel	
Peru	Telefonica	
Philippines	Globe Telecom	
Philippines	Smart	
Puerto Rico	Claro	
Russia	MTS	
Russia	Vimpelcom	_
Russia	Tele2 Russia	
Russia	Megafon	
Slovak Republic	O2 (Telefonica)	
South Africa	MTN	
Spain	Telefonica	
Turkey	Turkcell	
UK	O2 (Telefonica)	
UK	Clear Mobitel	_
Ukraine	MTS-Ukraine	-
USA	Clearwire	-
Vietnam	FPT Telecom	_
Vietnam	VDC	-

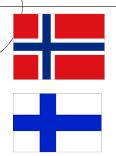
### LTE eco-system is building





## 2.6 GHz: key LTE band for APAC, Europe, MEA, LatAm





Telenor and Netcom acquired 2.6 GHz spectrum and are building LTE networks in Norway
 TeliaSonera launched LTE commercial service in Oslo launched on December 15, 2009

Teliasonera, Elisa and DNA have been granted licences and 2.6 GHz spectrum and are deploying LTE networks in Finland



TeliaSonera Sweden launched LTE beginning in Stockholm in December 2009; now continuing deployment in more cities using nationwide 2 x 20 MHz 2.6 GHz spectrum

Tele2 Sweden with TeleNor Sweden launched an LTE network (via their JV - Net4Mobility) on November 15, 2010 which includes spectrum sharing in 900 MHz and 2.6 GHz



➢ In Hong Kong, 2x15 MHz blocks of 2.6 GHz FDD spectrum have been won via auction by China Mobile, Genius Brand and CSL. CSL launched LTE for corporate users on 25.11.10

Europe: 2.6 GHz spectrum has also been awarded in Austria, Denmark, Germany and The Netherlands More auctions of 2.6 GHz spectrum are planned in the coming months

Asia: 2.6 GHz spectrum consultations, trials are on-going in many markets including Australia, Indonesia, Malaysia, Singapore, Taiwan, The Philippines

MEA: Deployments, trials underway e.g Saudi Arabia, Jordan, South Africa, UAE

Latin America: Brazil, Chile and Mexico plan auctions of 2.6 GHz. In Colombia one operator has been allocated 2.6 GHz and will deploy LTE in this band



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### LTE1800: a promising option

- + Main motivation: coverage area about 2X larger than LTE2600.
- + Possibility to reuse antenna lines of UMTS2100 or GSM1800.
- + Possibility to deploy multi-RAN BTS with simultaneous LTE&GSM.
- + 1800 MHz (ITU band 3) widely available in Europe and APAC.
- + Not big regulatory issues: 1800 band often technology neutral.
- + Spectrum need for full LTE data speed 18.4 MHz when GSM and LTE base stations at same sites (coordinated case).
- + Often easier to refarm than 900 MHz.
- Terminal availability 6-12 months after LTE2600: not a real issue.
- LTE1800 can be estimated to be ready for mass market in 2012 with first network deployments and terminals in volume.

=> LTE1800: promising and available for mass market in time

Used with permission from Elisateur, Elisa LTE World Summit, Amsterdam

Coordinated<br/>GSM-LTE caseRequired<br/>spectrum20 MHz LTE18.4 MHz15 MHz LTE13.8 MHz10 MHz LTE9.4 MHz

elisa



LTE1800 operator trials and deployment activities e.g.:

Elisa (FI) Bouygues Telecom (FR) Orange (FR) Cosmote (GR) Telstra (AUS) VHA (AUS) CSL Ltd (HK) SmarTone-Vodafone (HK) T-Mobile (some markets)

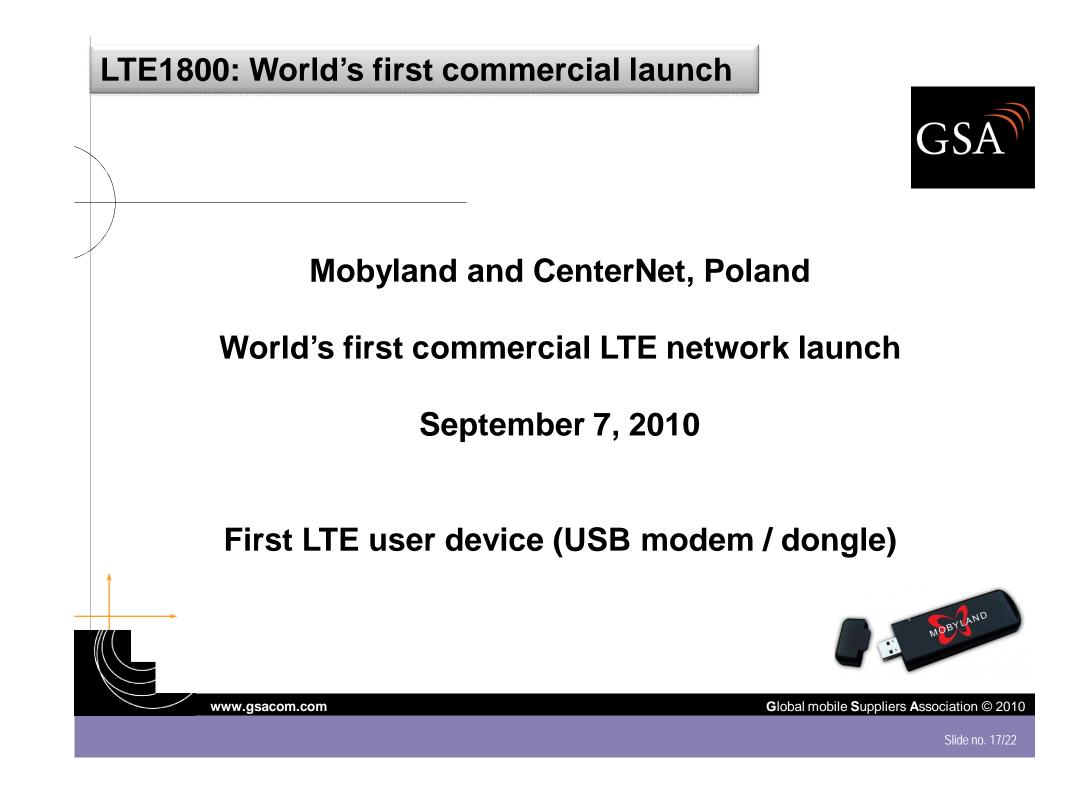
First commercial LTE1800 system launched (in 20 MHz bandwidth) Mobyland & CenterNet Poland



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# The LTE market includes TDD as well as FDD

#### LTE TDD is positioned as the next evolution of the TD-SCDMA family and a natural progression

- □ From 3GPP standards perspective: commonality with FDD
- □ From vendor perspective: increasing use of software defined radio techniques
- From operator perspective: spectrum availability, flexible base stations

Large-scale LTE TDD trial during the World Expo 2010, Shanghai





Clearwire (USA) has requested 3GPP to standardize LTE TDD for operation in 2496 – 2690 MHz and on August 4, 2010 announced plans for technology trials to test both LTE TDD and LTE FDD

Softbank Mobile (Japan) is reported to be considering LTE TDD in 2.5 GHz spectrum it owns

WiMAX<sup>™</sup> operator Asiaspace (Malaysia) is exploring deployment in near future of LTE TDD in 2.3 GHz band

Mobyland and CenterNet are testing LTE TDD in Poland in 2.5 GHz band



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# LTE TDD is maturing towards commercialization



- $\downarrow$ TE TDD showcase at the World Expo 2010, Shanghai key milestones achieved in the trial included:
- > Demonstration of LTE TDD HD video telephone in single 20 MHz spectrum with peak DL speeds of up to 80 Mbps
- > Demonstration of VOD, video communication, and other high-speed mobile broadband apps
- Demonstration of 24-channel video streaming
- > Mobile HD video conferencing between the trial network and another location
- > Inter-Operability Test of multiple LTE TDD USB dongles in a single mobile network cell

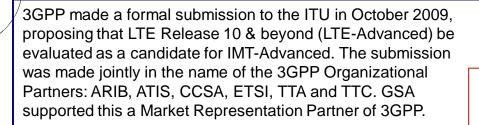
China Mobile is deploying further trial LTE TDD networks in 3 major cities (Qingdao, Xiamen and Zhuhai). Deployment in each city will be 100+ base stations. Smaller trial networks will also be deployed in Beijing and Shanghai

China Mobile is also partnering with foreign operators to trial LTE TDD networks overseas, e.g. Taiwan

- Orange France is trialling LTE in both FDD and TDD modes
- Omantel showcased LTE TDD to visitors to the Salalah Tourism Festival in July 2010
- Russia: LTE TDD commercial network deployment (Yota) and trial (Rostelecom)
- India is a key market for LTE TDD following the BWA spectrum auction. Qualcomm through its JV with local partners is committed to LTE TDD and anticipates commercial service from 2011. Some other BWA spectrum winners are finalizing their technology choice, so more may also choose LTE TDD







Officially recognized as an IMT-Advanced (4G) system

**LTE-Advanced** 

The ITU has now formally recognized LTE and LTE-Advanced as a future-proofed roadmap for mobile operators who are deploying more and more advanced mobile broadband services.

In October 2010 the ITU announced it had accepted and officially designated LTE-Advanced as an IMT-Advanced (4G) technology. IMT-Advanced provides a global platform on which to build the next-generations of interactive mobile services that will provide faster data access, enhanced roaming capabilities, unified messaging and broadband multimedia

3GPP plans to complete its work on LTE-Advanced specifications by 2010/2011



#### Smooth transition from 3G to 4G

LTE-Advanced will be the main feature of 3GPP Release 10

LTE-Advanced formally submitted on Oct 7, 2009 to the ITU for evaluation as a candidate for IMT-Advanced

#### mproved spectrum efficiency

Support for wider bandwidth: Up to 100 MHz

Downlink transmission scheme Improvements to LTE by using 8x8 MIMO Data rates 100 Mbps high mobility, 1 Gbps low mobility

Uplink transmission scheme Improvements to LTE; data rates up to 500 Mbps

#### Reduced latency

Relay functionality Improving cell edge coverage More efficient coverage in rural area

Backward compatibility and interworking with LTE and other 3GPP legacy systems

ITU website: Overview - Development of IMT-Advanced www.itu.int/itunews/manager/display.asp?lang=en&year=2008&issue=10&ipage=39&ext=html

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## LTE: the single global standard

LTE operator commitments are GSA growing fast www.gsacom.coi 140 © Global mobile Suppliers Association Number of 120 network commitments 100 80 6 months after 1st commercial launch 60 40 12 months after 1st commercial launch 20 HSDPA HSUPA HSPA+ ITE Note: LTE data is for 6 months and 11 months



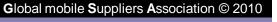
LTE is on track, attracting global industry support Operator commitments are similar/higher than HSPA

LTE is the natural migration choice for GSM/HSPA operators. LTE is also the next generation mobile broadband system of choice of leading CDMA operators, who will be in the forefront of service introduction

Leading WiMAX operators are also shifting to LTE

LTE TDD mode is a real complement to LTE FDD and a future-proof evolution path for TD-SCDMA

□ With LTE we have <u>one single global</u> <u>standard</u>, securing and driving even higher economies of scale and simplifying roaming



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News, technology and market updates

Discussions

www.facebook.com/pages/Global-mobile-Suppliers-Association-GSA/123462771012551

Networking

Subgroups established: UMTS900 LTE1800 HD Voice



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