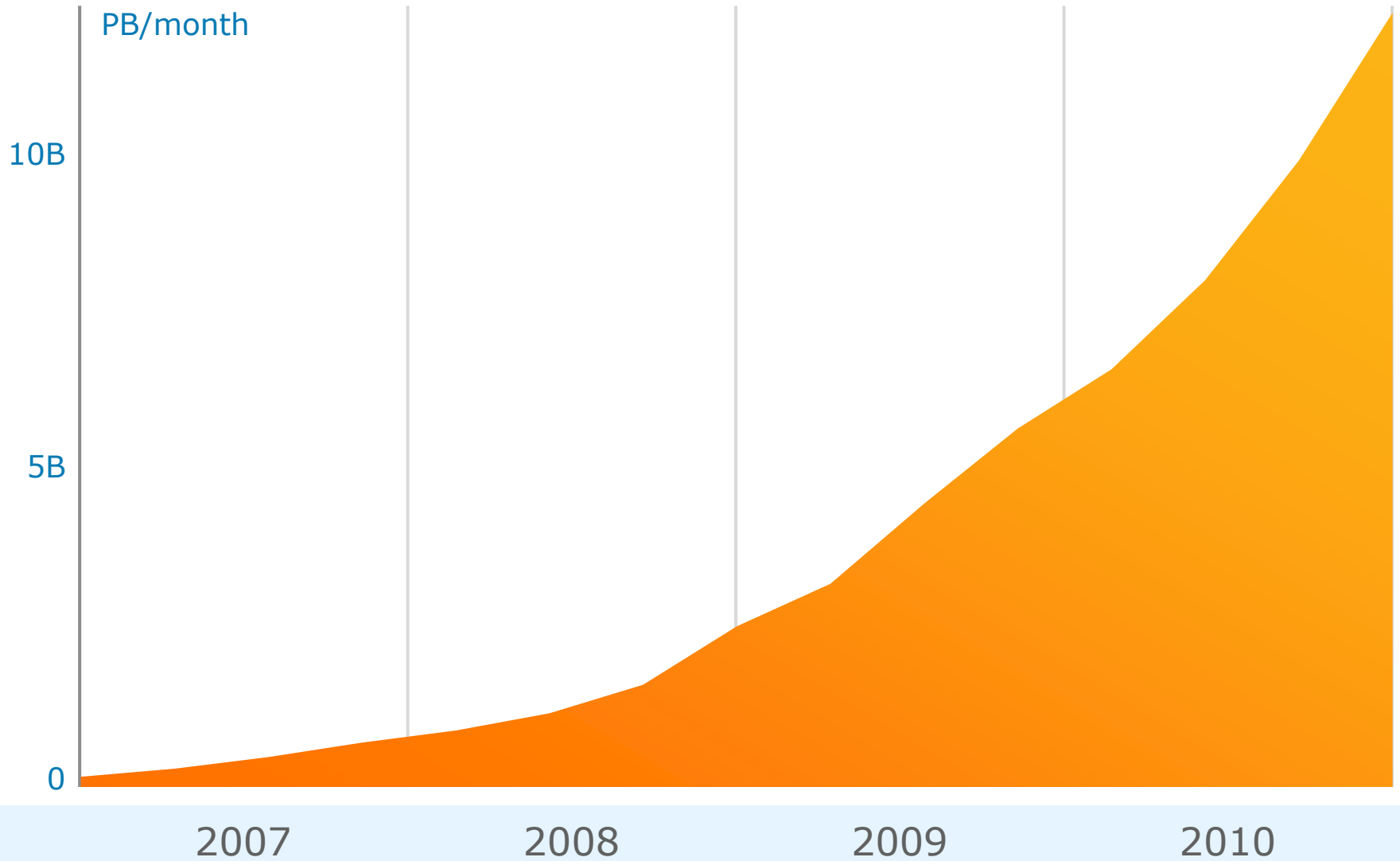




# Mobile broadband explosion and pressing demand for spectrum

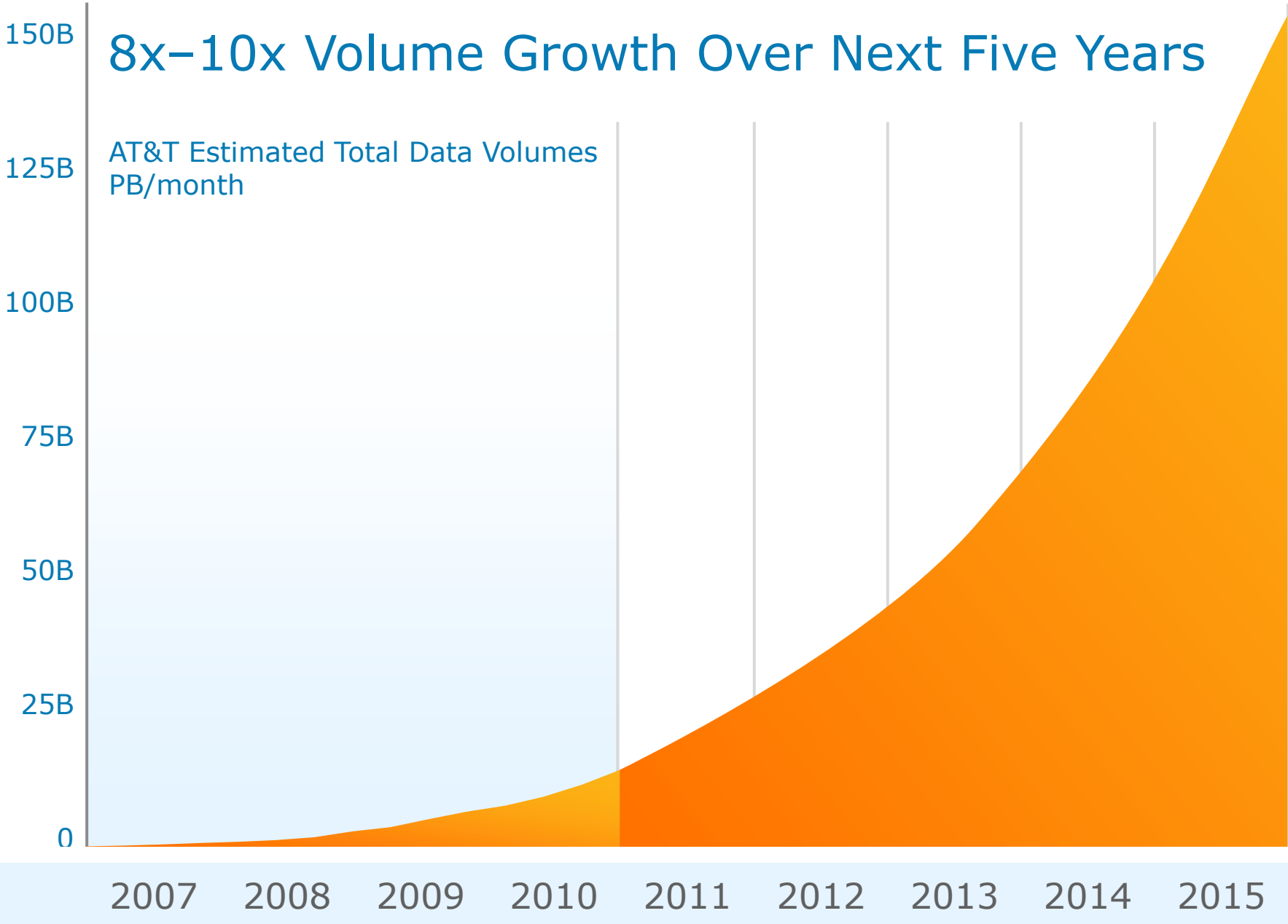


# AT&T Mobile Data Volumes Up 8,000% Over Four Years



# 8x-10x Volume Growth Over Next Five Years

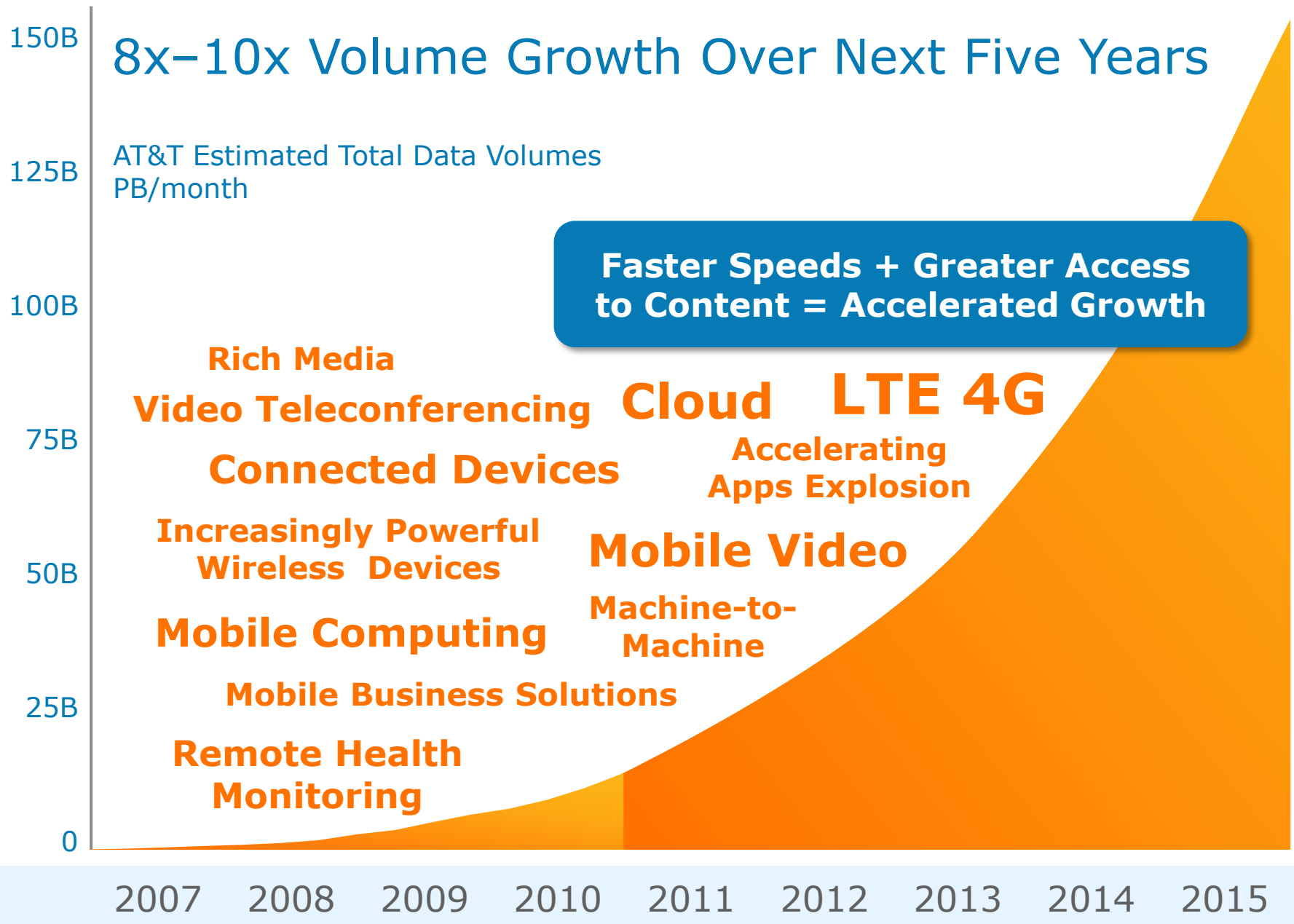
AT&T Estimated Total Data Volumes  
PB/month



# 8x-10x Volume Growth Over Next Five Years

AT&T Estimated Total Data Volumes  
PB/month

**Faster Speeds + Greater Access  
to Content = Accelerated Growth**



**Rich Media**  
**Video Teleconferencing**  
**Connected Devices**  
**Increasingly Powerful Wireless Devices**  
**Mobile Computing**  
**Mobile Business Solutions**  
**Remote Health Monitoring**

**Cloud**  
**Accelerating Apps Explosion**  
**Mobile Video**  
**Machine-to-Machine**

**LTE 4G**

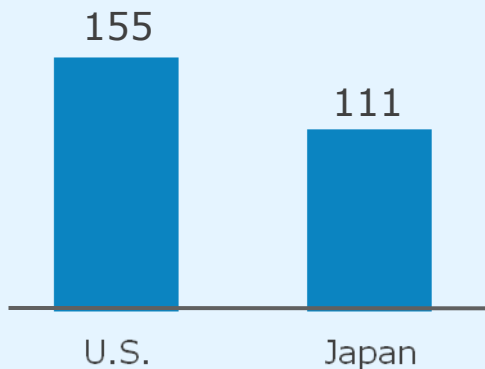
2007 2008 2009 2010 2011 2012 2013 2014 2015

# Spectrum crunch jeopardizes U.S. & AT&T because ...U.S. leads the world and AT&T leads U.S.



## Mobile BB Subs

2010E (in millions)



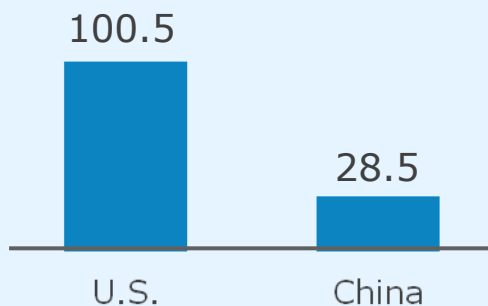
Source: OVUM, Mobile Technology Forecast, June 2010

**The U.S. leads the world in mobile broadband subscribers**

**And AT&T leads the U.S.**

## Smartphone Sales

2011E (in millions of units)



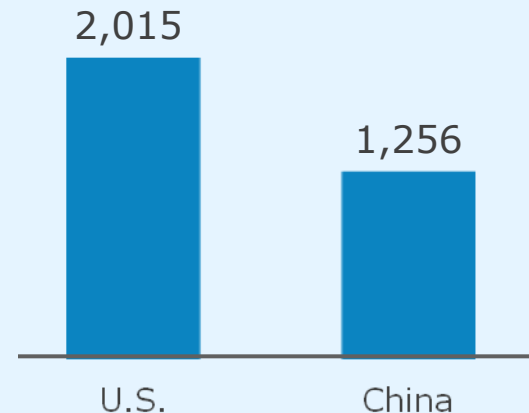
Source: Strategy Analytics, Global Smartphone Sales Forecast by Country: January, 2011

**The U.S. leads the world in smartphone sales**

**And AT&T leads the U.S.**

## Application Downloads

2010 (in millions)



Source: Strategy Analytics, February 2011

**The U.S. leads the world in application downloads**

**And AT&T leads the U.S.**

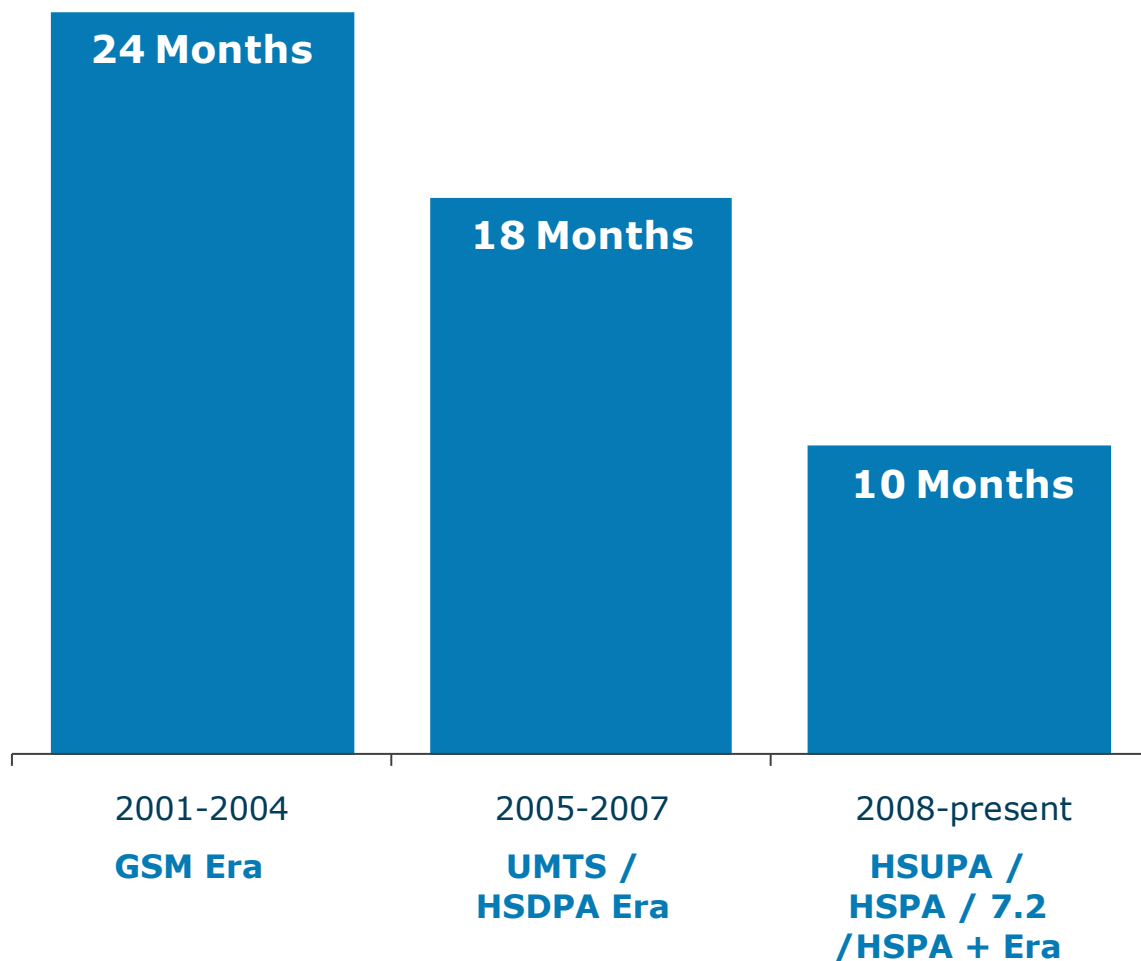
AT&T subscribers download 42% more apps than subs at other carriers\*\*

\*\*Source: Yankee Group, Mobile App Gold Rush Speeds Up, March, 2010

# AT&T spectrum consumption trends



**In major metro areas, AT&T is now burning through 10 MHz of spectrum every 10 months**



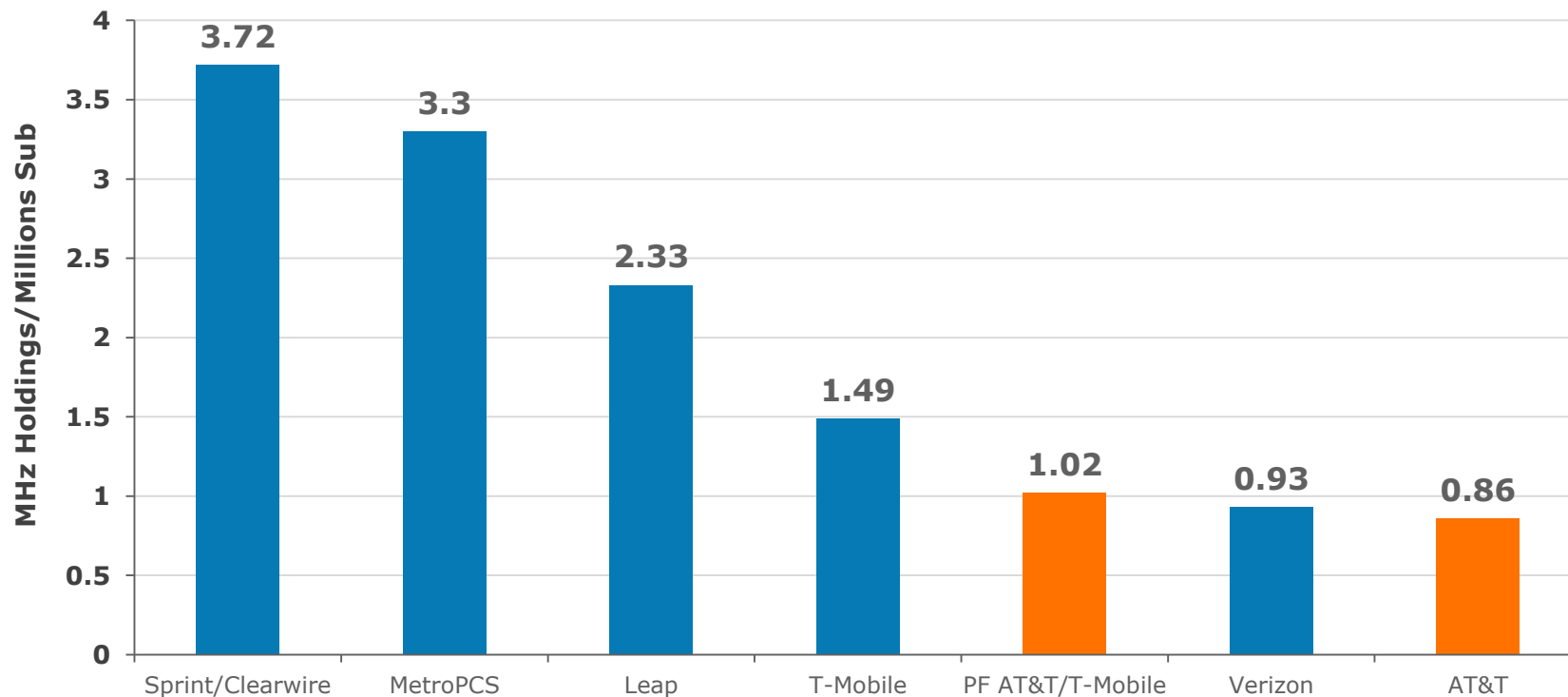
→ **AT&T and T-Mobile are both facing impending spectrum exhaust challenges in NYC and other major markets**



# Current spectrum holdings



## Spectrum Holdings / Million Subscribers



“The **clock is ticking on our mobile future**, and we cannot solve our mobile challenges by snapping our fingers; we must act without delay to free up spectrum for mobile broadband.”

- **FCC Chairman Genachowski**, Mobile Future Forum, 16 March 2011

