

# **Australian Mobile Telecommunications Association**



**Productivity -  
Connectivity - Mobility**

**2011 - 2015**

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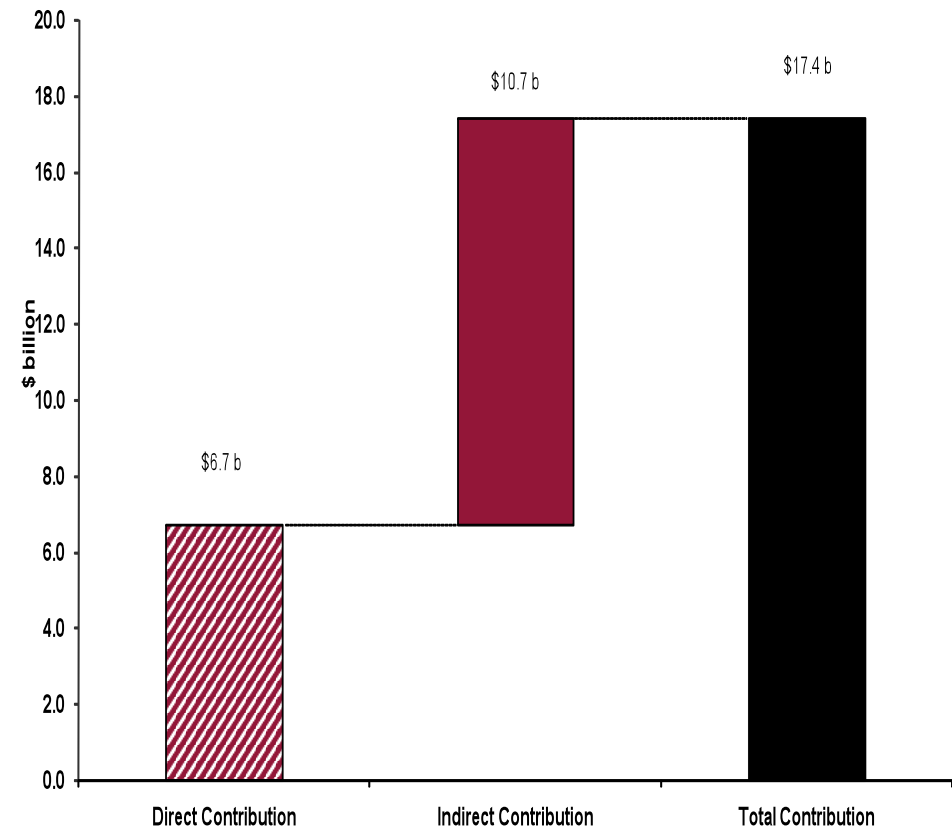
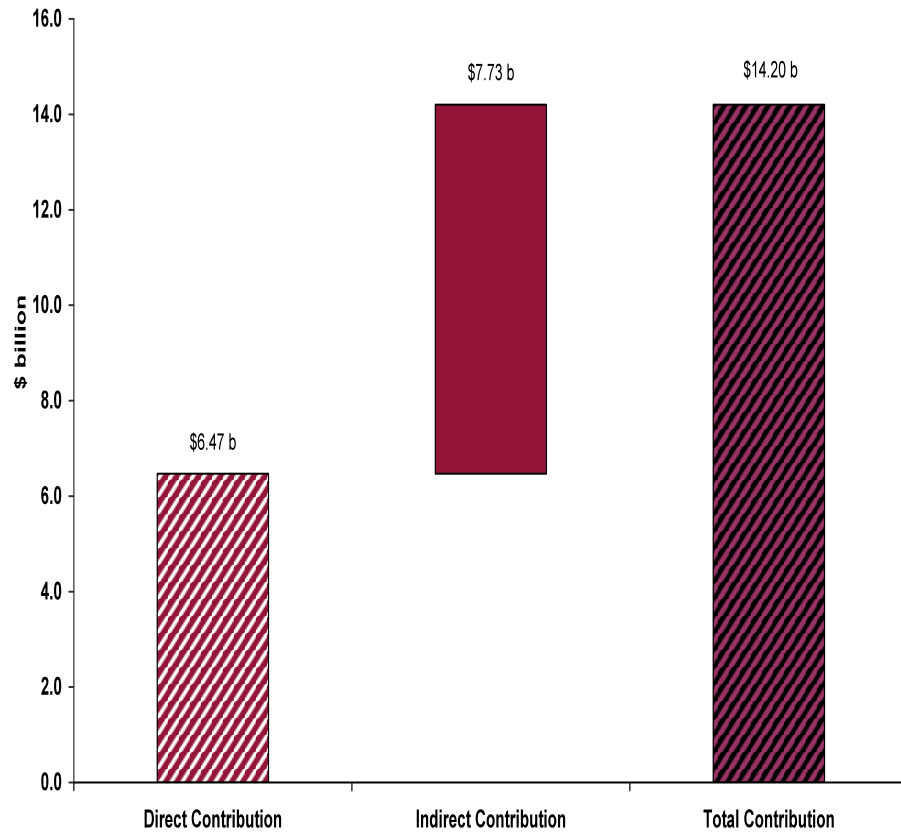
# Latest data and forecasts

- 26+ million mobile subscriptions services in Australia – to June 30 2010 – ACMA
- Mobile broadband subscriptions increased 71% to reach around 3.46 million as at 30 June 2010
- Globally 600 million mobile broadband subscriptions in 2010
- 1 Billion mobile broadband subscriptions in 2011/12
- around 5 Billion by 2016

# Economic Contribution of Mobile Telecommunications

## 2008

## 2010

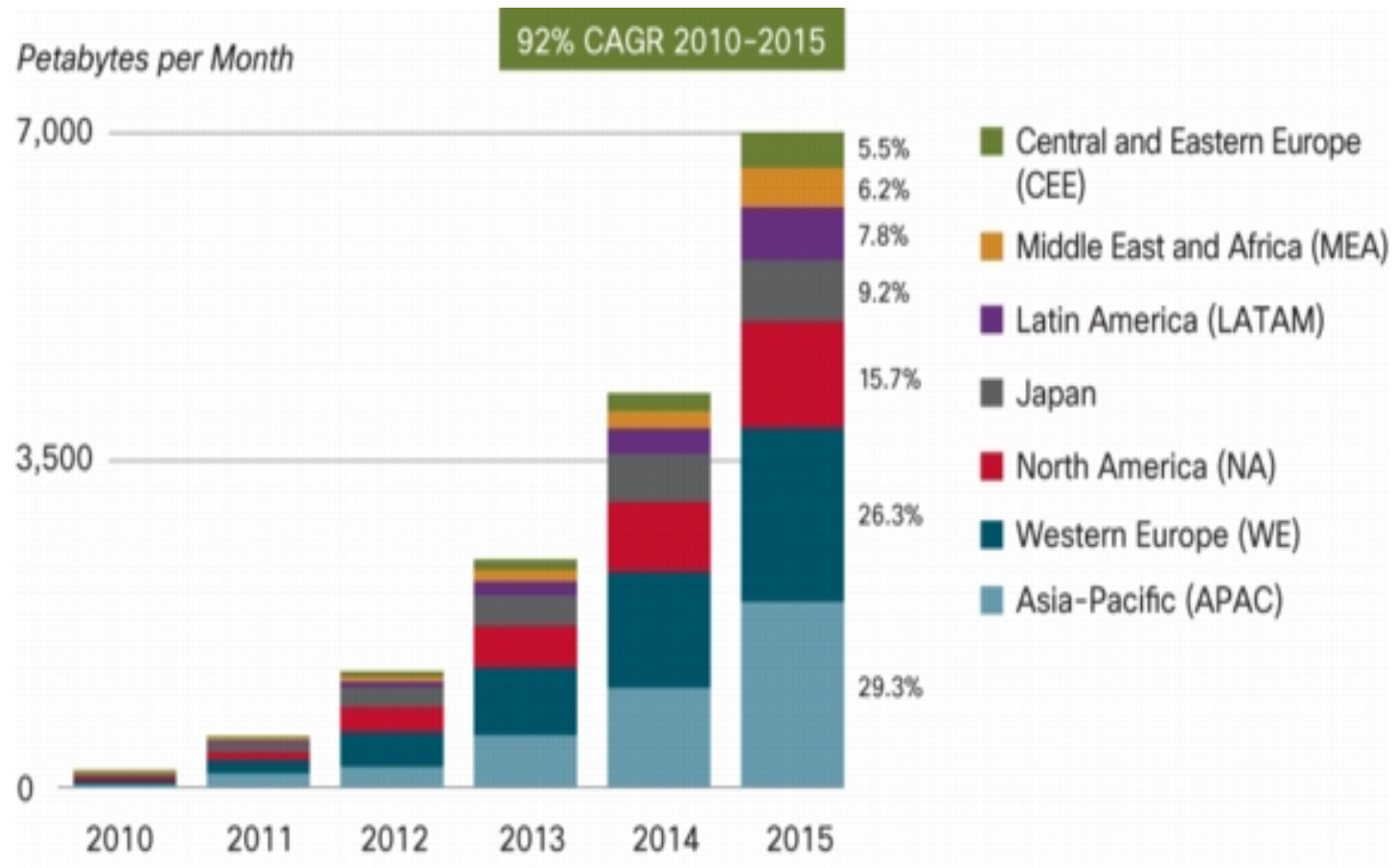


Source: Access Economics

## By 2015 .....

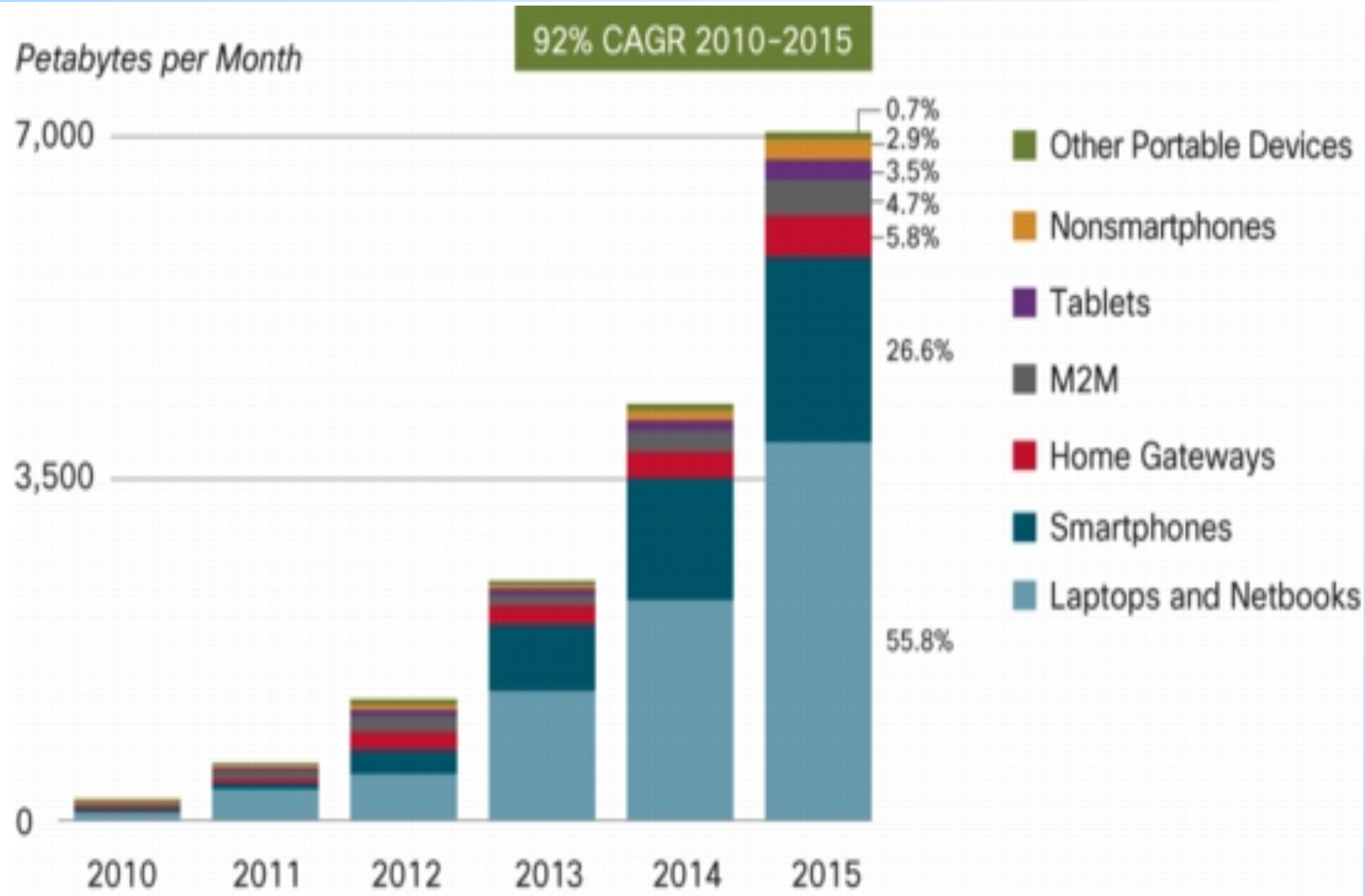
- Global mobile data x 26 to 6.3Exb / month
- Nearly one mobile device per capita (7.1 billion incl M2M connections)
- LTE expected to grow from 4.2 million connections in 24 countries in 2011 to around 300 million in 55 countries by 2015
- Mobile network connection speeds x 10 ..... 2/3 of global mobile data traffic will be video
- Mobile connected tablets generate same traffic as all global networks in 2010 as will M2M traffic
- Average smartphone will generate 1.3GB/month
- 788 million mobile only internet users

# Global Mobile Data Traffic Forecast by Region



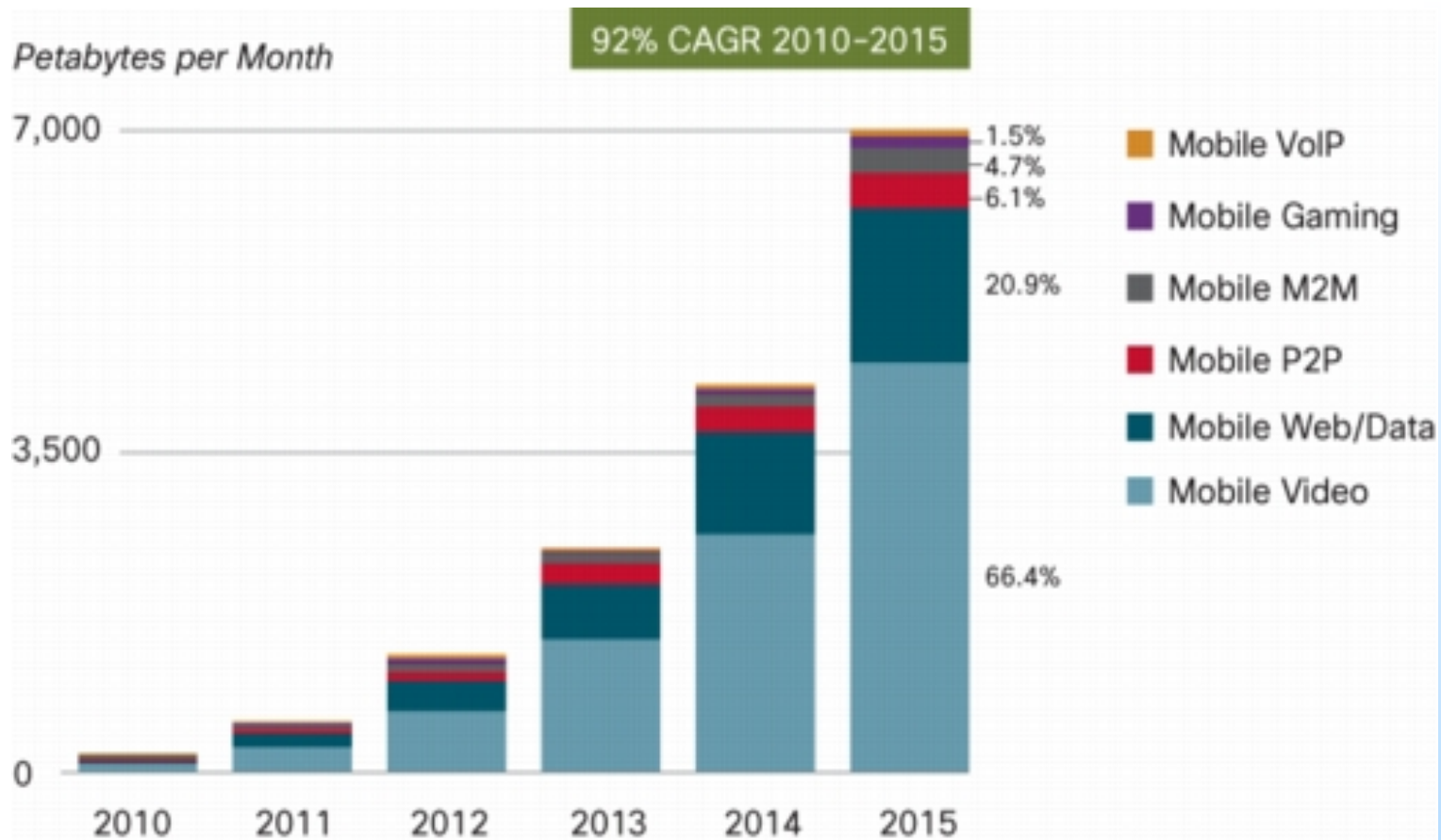
Source: Cisco VNI Mobile, 2011

# Laptops and Smart-phones Lead Traffic Growth



Source: Cisco VNI Mobile, 2011

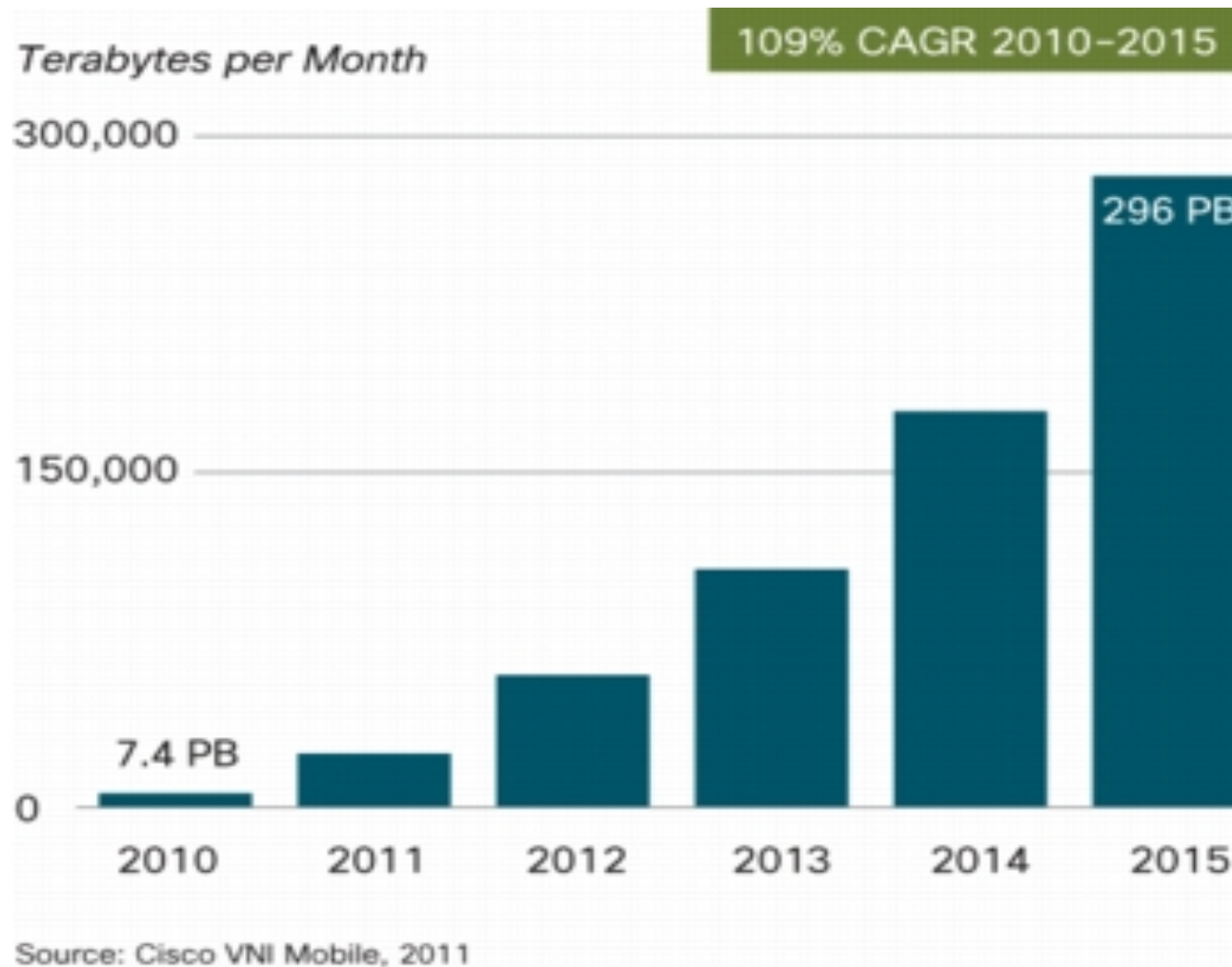
# Mobile Video Will Generate 66 Percent of Mobile Data Traffic by 2015



VoIP traffic forecasted to be 0.4% of all mobile data traffic in 2015.

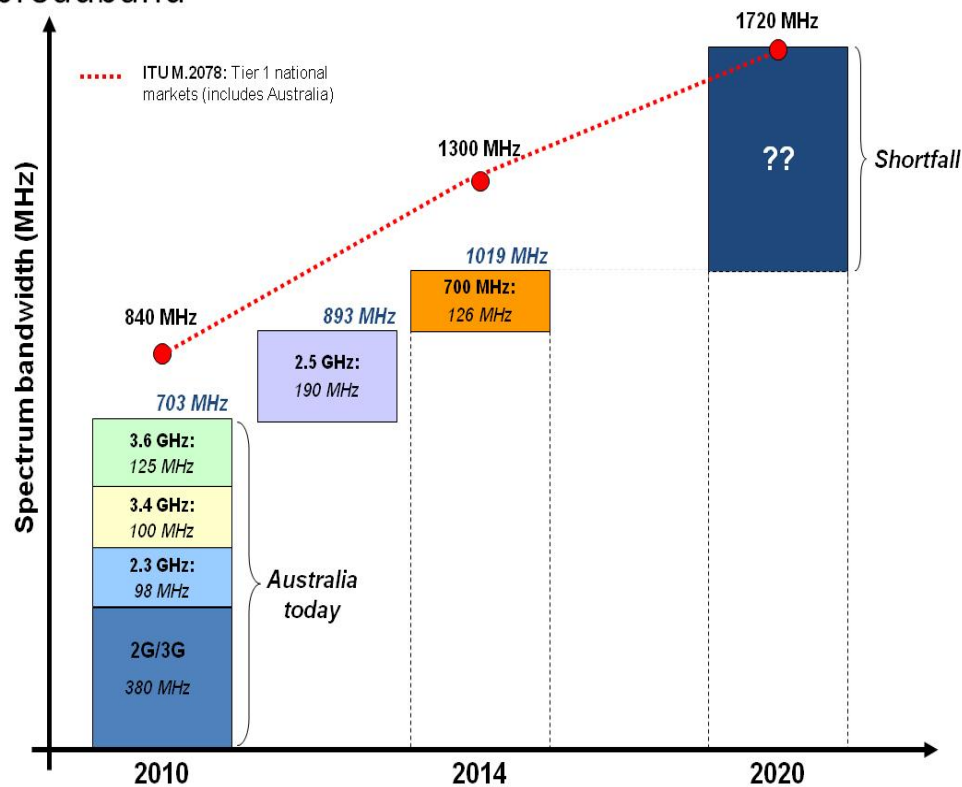
Source: Cisco VNI Mobile, 2011

# Machine-to-Machine Traffic to Increase 40 Fold Between 2010 and 2015



# Global Spectrum Demand - ITU

Spectrum demand forecast 2010 - 2020 – mobile broadband



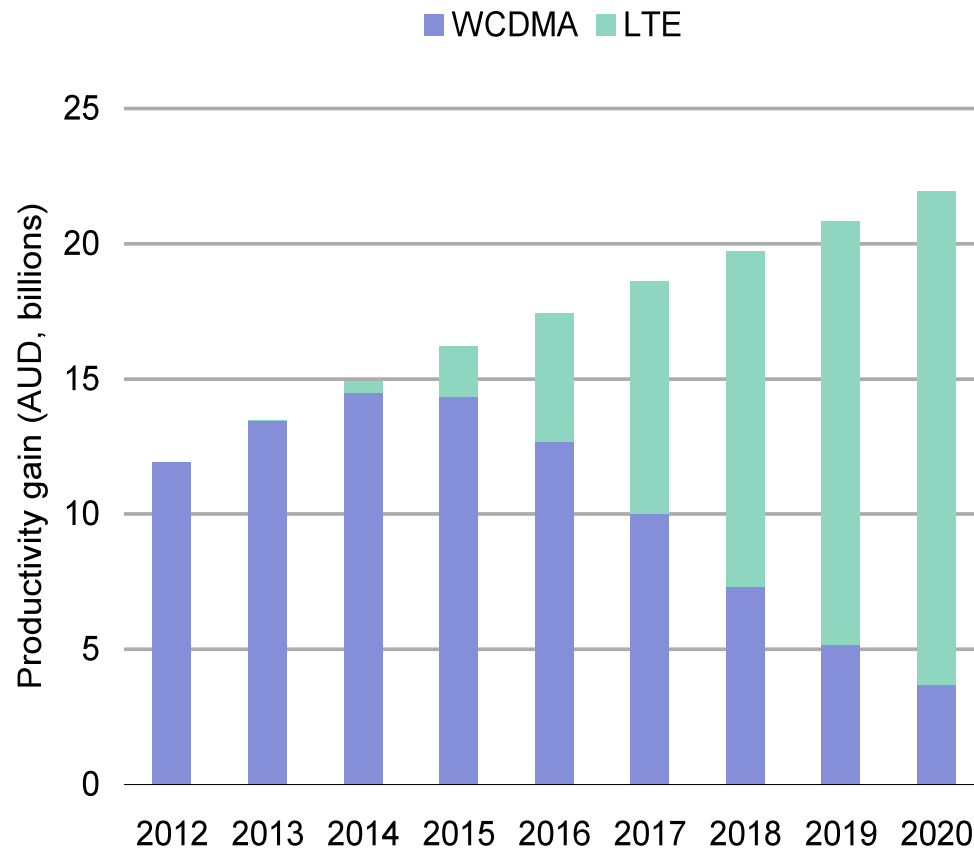
Source: ITU-R Report M.2078 (2007) Demand Forecast 2010-2020

***“Every day we are not freeing up spectrum for mobile broadband is another day we are not fulfilling our potential .”***

***“ 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 Julius Genachowski – 16 March 2011

# Estimated productivity benefit from mobile broadband Australia



Source: Network Strategies – June 2010

***“ Research has shown that consumer benefits are 10 times higher than the value the actual spectrum generates at auction.***

FCC Chairman Julius Genachowski – 16 March 2011

# Infrastructure Planning

- Meeting customer demand for quality user experiences with latest generation mobile applications and services depends on **investment, innovation and infrastructure**
- spectrum policy must align with local demand & global allocation trends - industry needs certainty to plan and invest based on a commitment to timely spectrum access
- Partnership with fixed infrastructure will be equally important

# 2015 – towards Networked Society

- Increasingly influenced by generation C – digital natives
- By 2020 ... 40% of popln in USA, Europe and BRIC – largest consumer group
- Content and services demand – seamless, integrated, always on, spanning all sectors – health, financial, education, entertainment transport, utilities, government....etc
- New business models are adaptive, technology optimized, built on partnerships
- Connectivity – if it can be connected it will be.. broadband + cloud

# Convergence Review

- AMTA's view key principles for the Convergence Review
  - The need to support an environment that promotes investment in convergent industries
  - A policy framework based on regulatory forbearance
  - A policy framework based on minimising the regulatory burden

# Australian Mobile Telecommunications Association



**Thank you**

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