Open for Debate Webinar Series

Is the Industry Moving Fast Enough on Standalone 5G?

20th July, 2022 | 12:00 pm BST / 13:00 CET

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GSMA Intelligence

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Who are we? What do we know?

GSMA Intelligence Serves **800** organisations

40,000 users worldwide

Data

1,400 Mobile operators

80 Operators groups

5,000 Networks

30M Data points up-dated daily

Research

130+ Reports annually

1M Report downloads in 2019

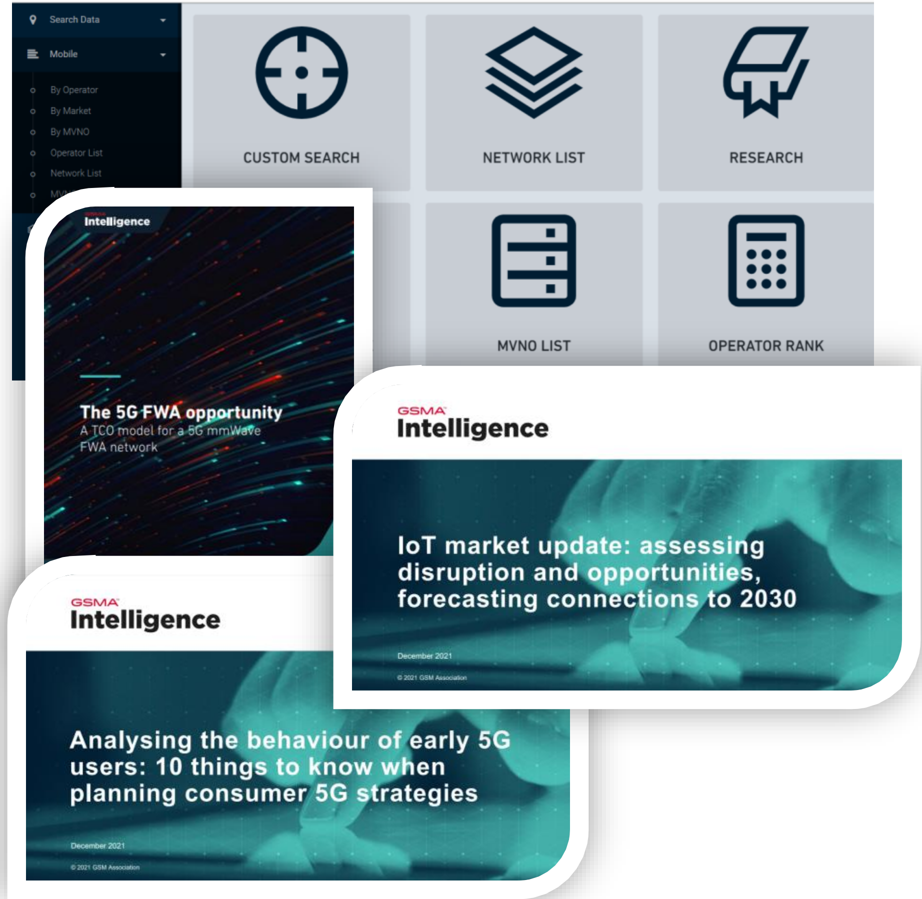
100+ Global, Regional & Topical Research, Deep Dives & Analysis

Pinpoint accuracy

Five-year forecatst consistently accurate within +/- 2.5% of reported data, updated quarterly

50+ Analysts & industry experts

Supporting the business strategy of our subscribers and the wider ecosystem



GSMA Intelligence

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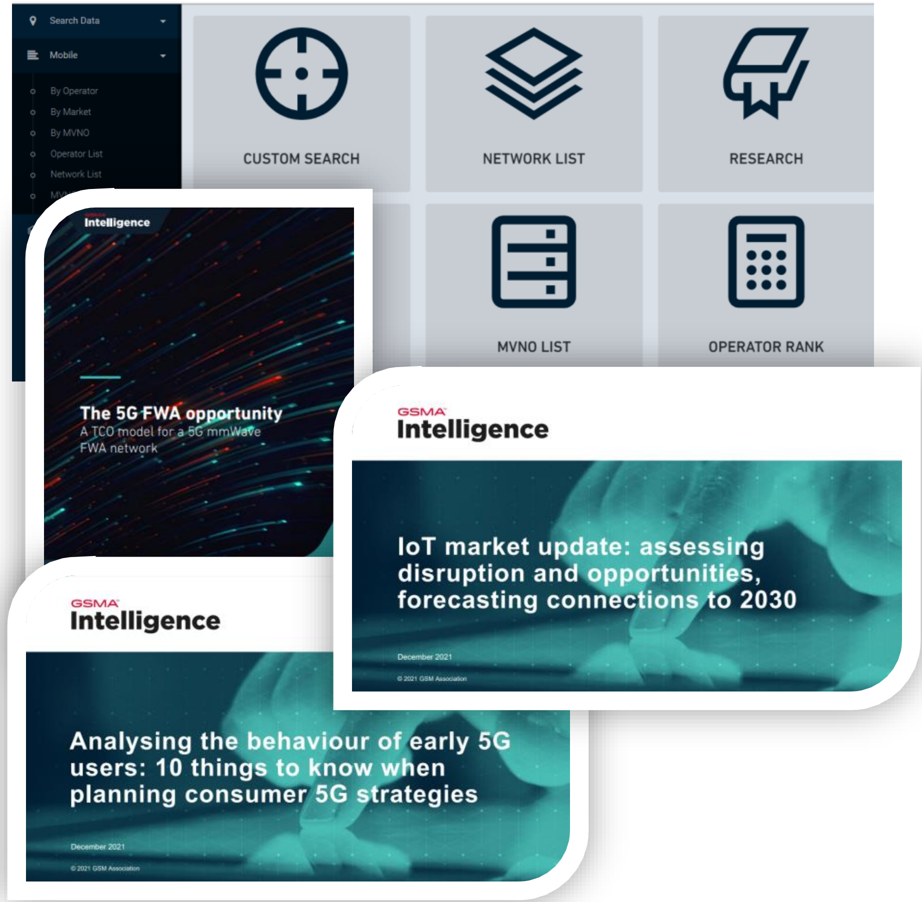

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5G in Context

We are now firmly in the 5G Era

	In Q2 2022	To end of Q2 2022	To end of 2022	To end of 2025	To end of 2030
Spectrum auctions	SVK, EST, IMN, BEL	213 operators** in 60 markets	71 countries complete assignments		
Trials	13 trials in 10 markets	242 operators in 106 markets			
Commercial launches*	8 operators in 8 markets	208 operators in 79 markets		421 operators in 133 markets	642 operators in 226 markets
Adoption		738 million connections (9% adoption)	969 million connections (11% adoption	2.3 billion connections (26% adoption)	5.2 billion connections (54% adoption)

* Launches of commercial mobile and FWA 5G services

** Excludes regional US and Canadian operators

Data correct to 30 June 2021. For updates, see gsmaintelligence.com

Source: GSMA Intelligence

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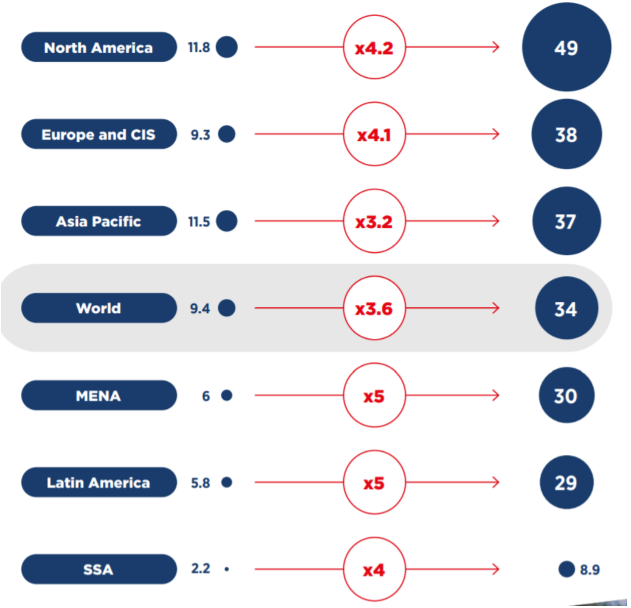
5G in Context

Why did we decide the industry needed 5G?

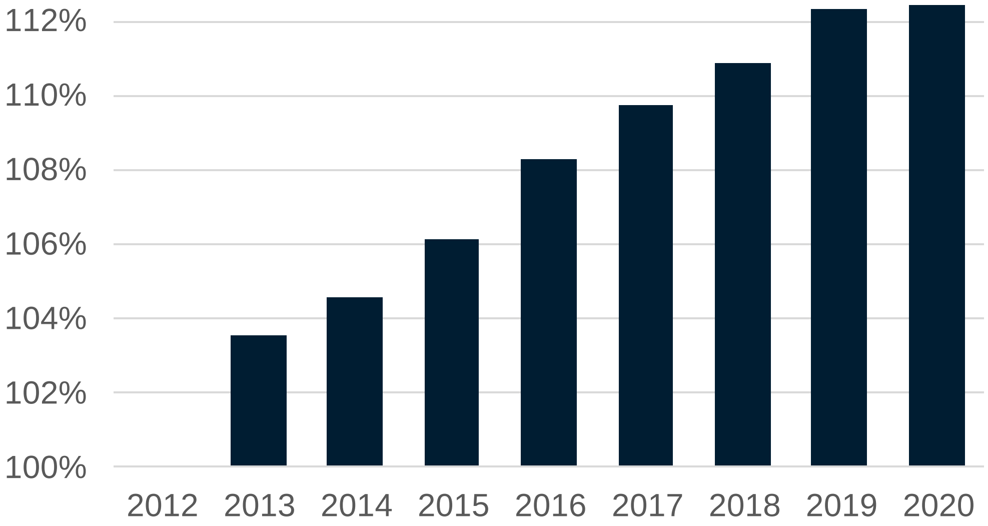
***Mobile Data Usage: 2020 vs. 2026**

(GB per user per month)



***Global Cellular Revenue: 2012 to 2020**

(growth from 2012)



**Source: GSMA Intelligence*

5G was built to do two things

address new traffic demands, and accelerate revenue growth

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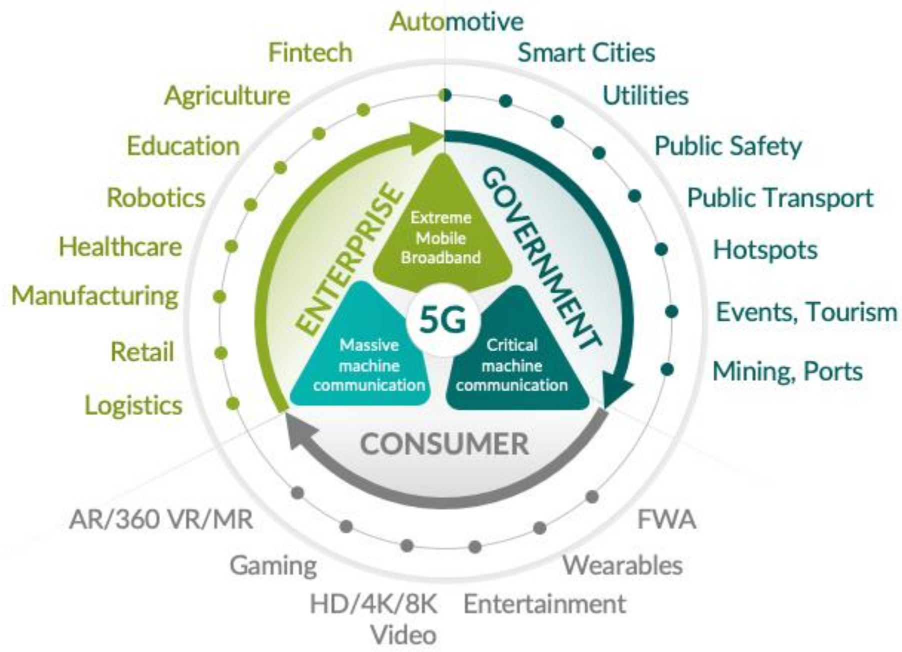
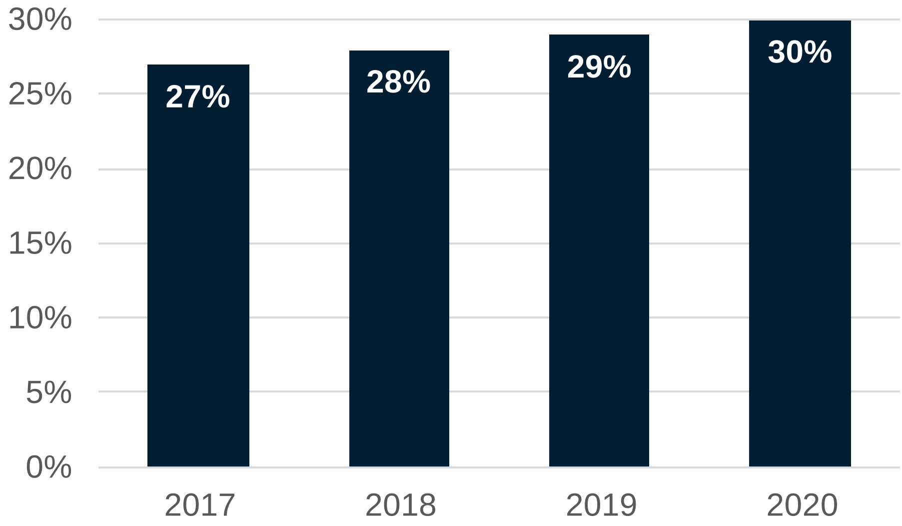
5G in Context

And, how was 5G going to be different from the past?



*Mobile Operator B2B Revenue: 2017 to 2020

(share of total, representative sample)



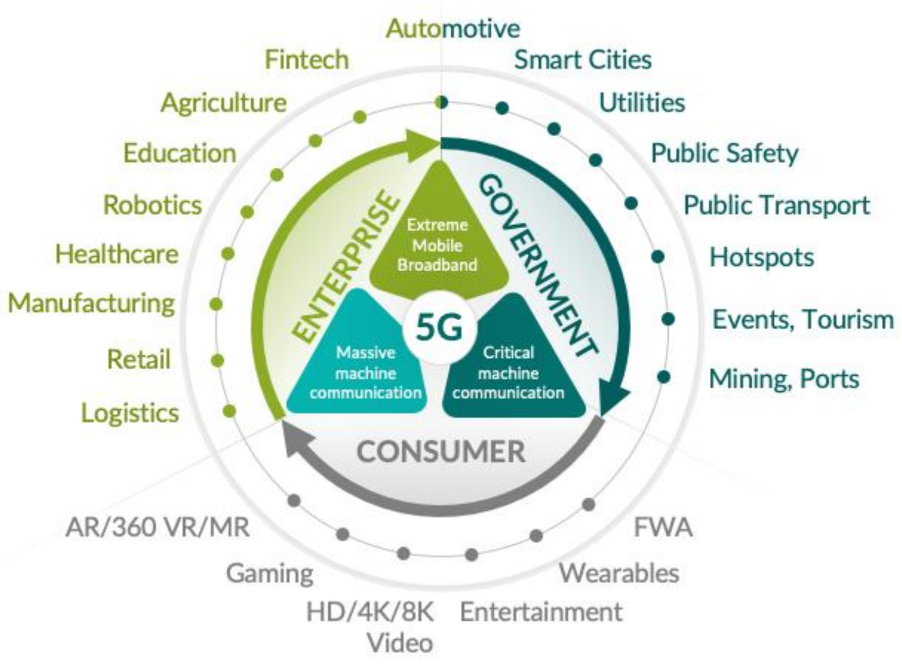
**Source: GSMA Intelligence*

Enterprise Verticals and Digital Transformation were THE 5G story

Operators are making progress with B2B revenues, but the upside is still massive

Standalone 5G in Context

Ultimately, the 5G promise is about Standalone 5G.



MMTC / IOT

Slicing

Latency / URLLC

Simplified Architecture

Enterprise Verticals and Digital Transformation were THE 5G story

Standalone capabilities and enhancements were how 5G was going to deliver

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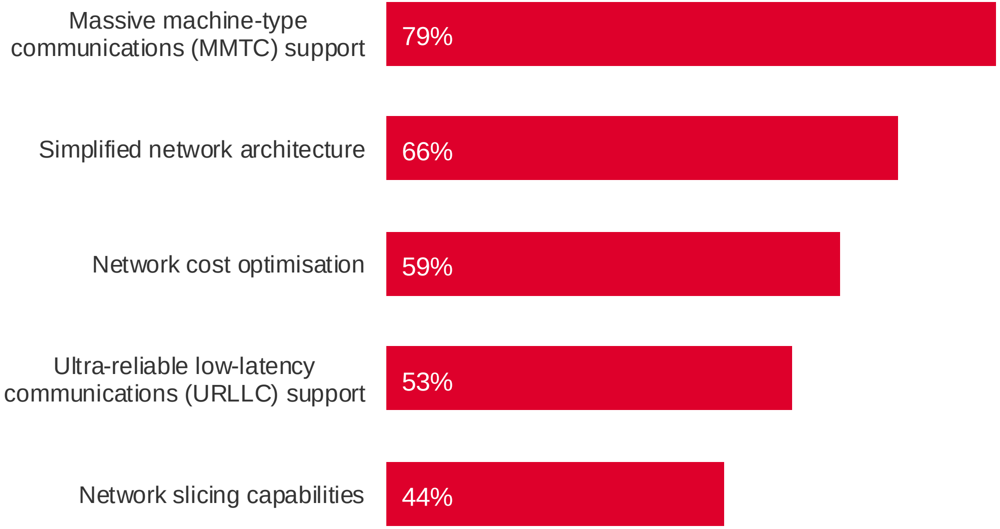
Standalone 5G in Context

Operators have an idea of what they want from Standalone

*Standalone 5G Benefits

(top ranked by operators)



MMTC / IOT

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Simplified Architecture

**Source: GSMA Intelligence*

Digital Transformation and Cost Containment Top Standalone Thinking

…but it’s unclear what operators might do tomorrow that they cannot today?

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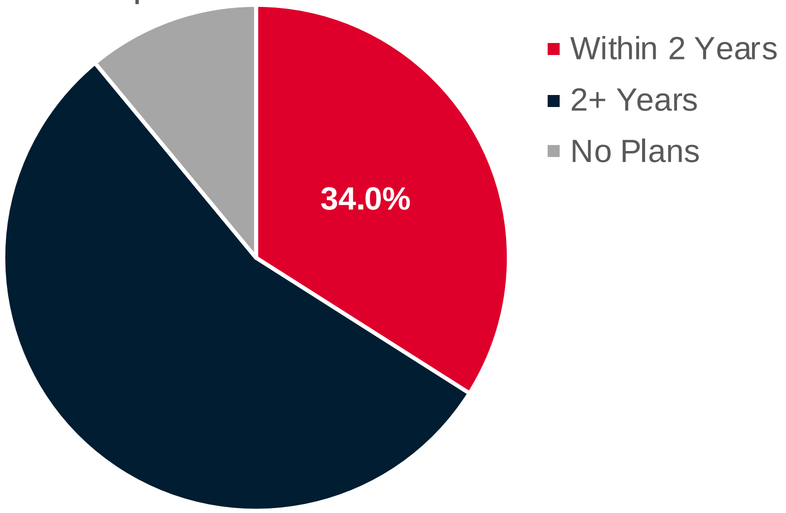
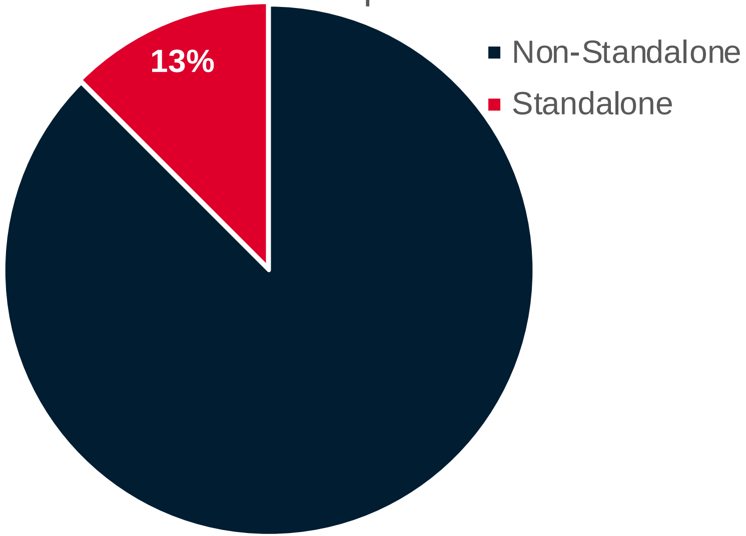
Standalone 5G in Numbers

Regardless of Standalone capabilities, deployment has been slow

5G Plans @ 2019:
Operator SA Plans Circa 2019



5G Markets @ 2022:
SA vs. NSA Operator Launches



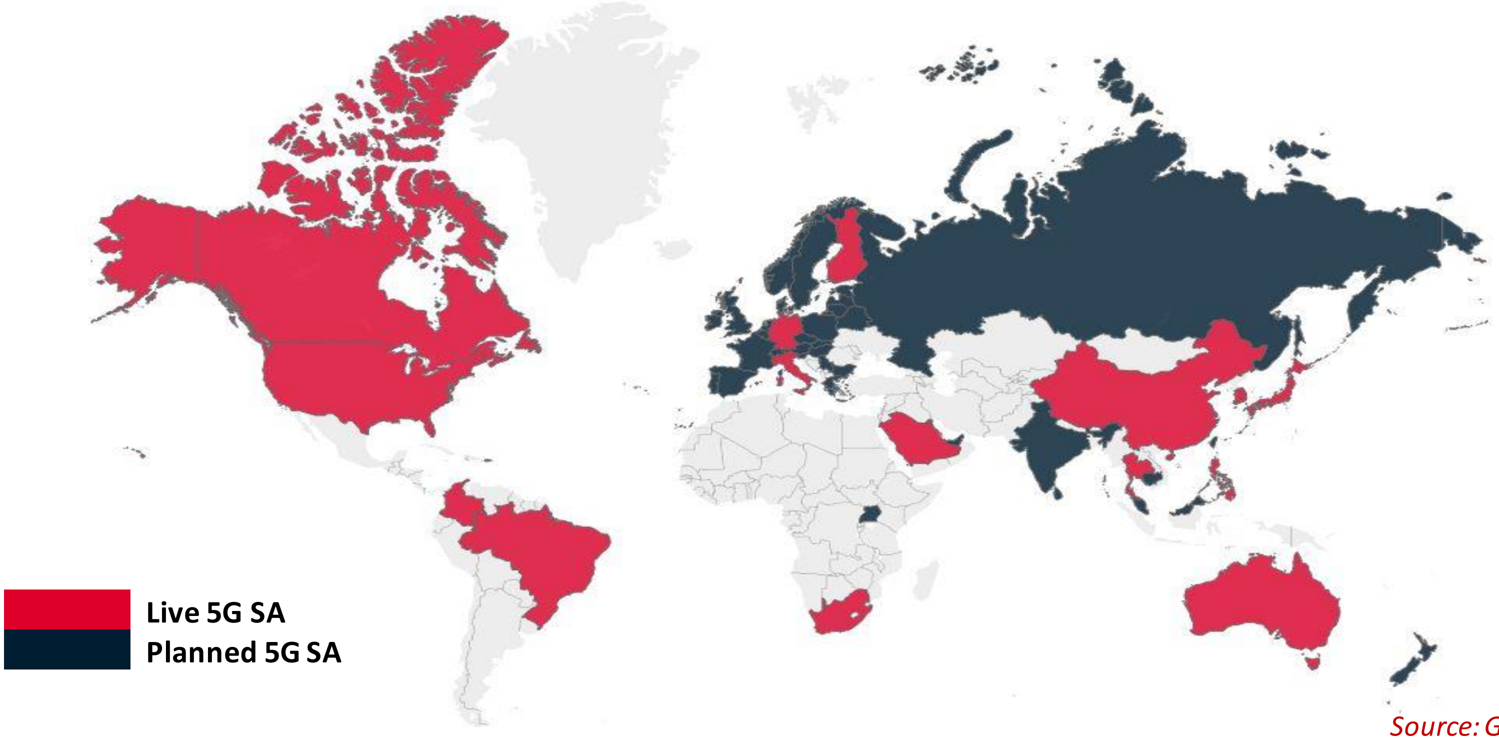
Source: GSMA Intelligence

Despite B2B aspirations, Standalone rollout has been disappointing

SA lags NSA by a large margin, potentially driving a focus on what's next

Standalone 5G in Numbers

Global data point towards skewed state of play



Source: GSMA Intelligence

Data indicate real momentum for SA network deployment

But majority of telcos (regions) are moving slow and taking time to commercialize

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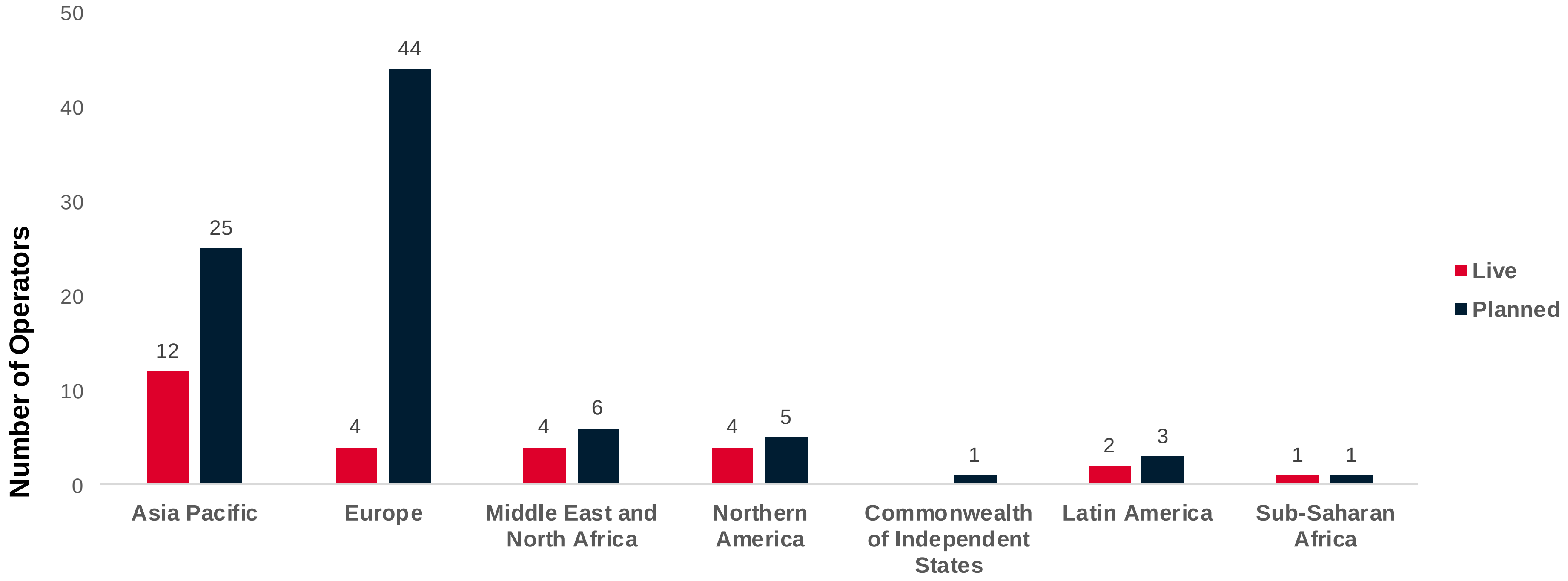
Standalone 5G in Numbers

...and varying near-term regional priorities



**Source: GSMA Intelligence*

APAC leads the way, with Europe planning to ramp up over the next few years

But are the future numbers promising enough?

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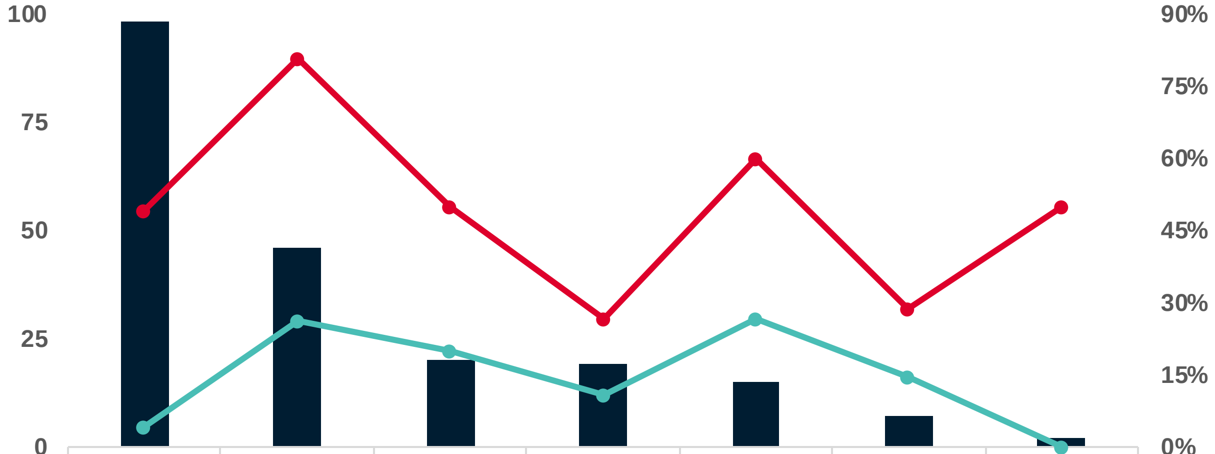
Standalone 5G in Numbers

Looking forward, the outlook is promising – assuming plans play out

***5G SA Share: Regional Outlook for Live and Planned Networks**



	Europe	Asia Pacific	Middle East and North Africa	Latin America	Northern America	Sub-Saharan Africa	Commonwealth of Independent States
5G Live	98	46	20	19	15	7	2
5G (live) V/s 5G SA (live)	4%	26%	20%	11%	27%	14%	0%
5G (live) V/s 5G SA (live + planned)	49%	80%	50%	26%	60%	29%	50%

5G Live — 5G (live) V/s 5G SA (live) — 5G (live) V/s 5G SA (live + planned)

**Source: GSMA Intelligence*

Most regions will have 50% or more of 5G networks on SA in next few years

Key to making that a reality is the business case and RoI

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showcase/gsma-intelligence

Thank You

We would love to hear from you…

Contact details:

- *info@gsmaintelligence.com*
- *Sales@gsmaintelligence.com*

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