



# The 5G Era

**Building a 5G world' –  
GCF and dU event on 25 Nov, Dubai**

Jawad J. Abbassi  
Head of MENA - GSMA

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# About the GSMA

THE GSMA  
WAS FOUNDED IN  
**1987**

15 OFFICES  
WORLDWIDE



SHANGHAI



SAN FRANCISCO



BEIJING



SÃO 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,  
InfoCentre<sup>2</sup> 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+**

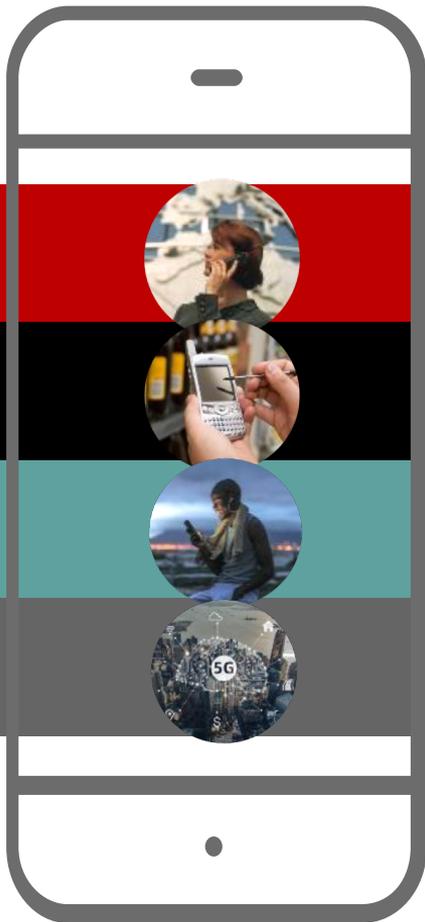
MOBILE CONNECTIONS  
WORLDWIDE

2G

3G

4G

5G



All about calls and texts

The start of mobile data

The arrival of mobile broadband services and applications

The network adapts to the application

**Ultra high speed**  
**Ultra low latency**  
**Massive # of connections**  
**New applications**



# 5G



**1.3bn**

5G connections  
worldwide by 2025



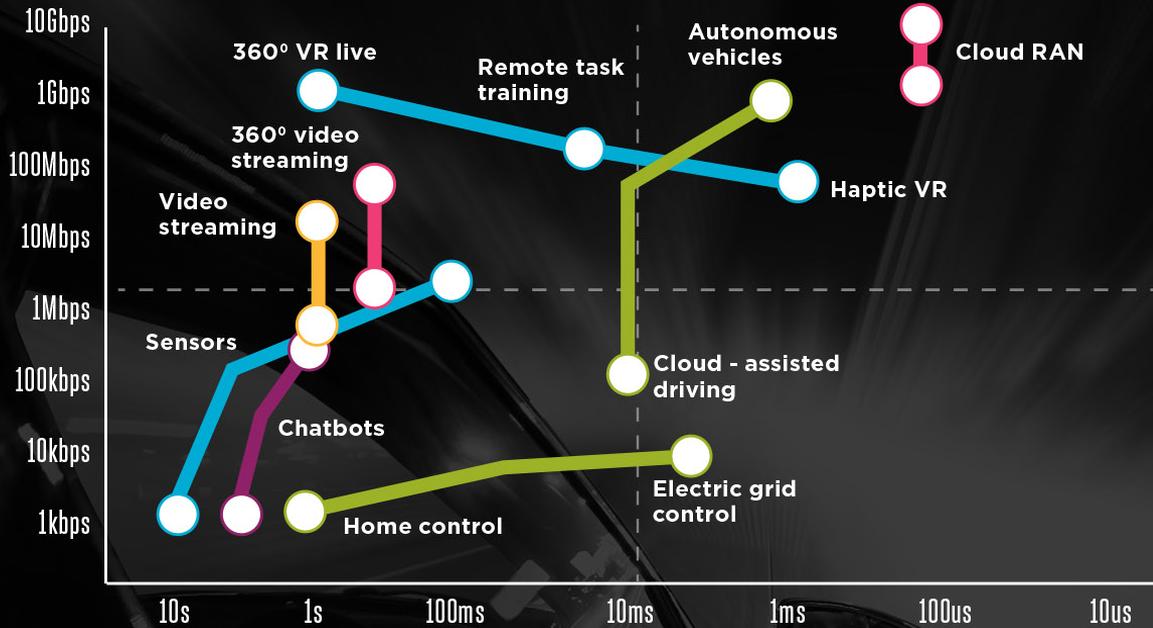
**40%**

of the global population  
by 2025



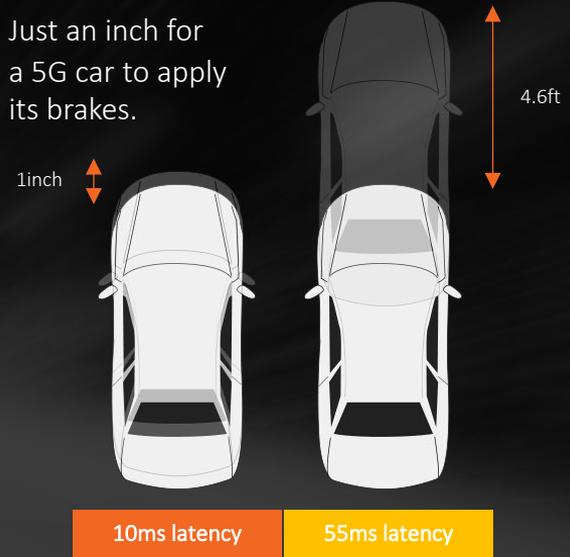
# Network 2020

## Where latency and throughput matters



REDUCED LATENCY HAS SIGNIFICANT REAL-WORLD IMPLICATIONS.

- 4.6 feet for a 4G car to apply its brakes.
- Just an inch for a 5G car to apply its brakes.





# The 5G era is here – and the results already impress

## Saudi Arabia drives GCC mobile phone shipments up 8% in second quarter

By Naushad K. Cherrayil 14 days ago Mobile Phones

techradar.pro

5G devices will ignite more demand next year as prices are expected to fall below \$300 or even \$200

MOBILE  
WORLD LIVE

'Data usage surges on Korea 5G networks'



## 5G technology and real-time app in the Bundesliga for 2019/20

12 WEEKS AGO

arabian  
**Business**

## Etisalat says 5G now available in world's tallest tower

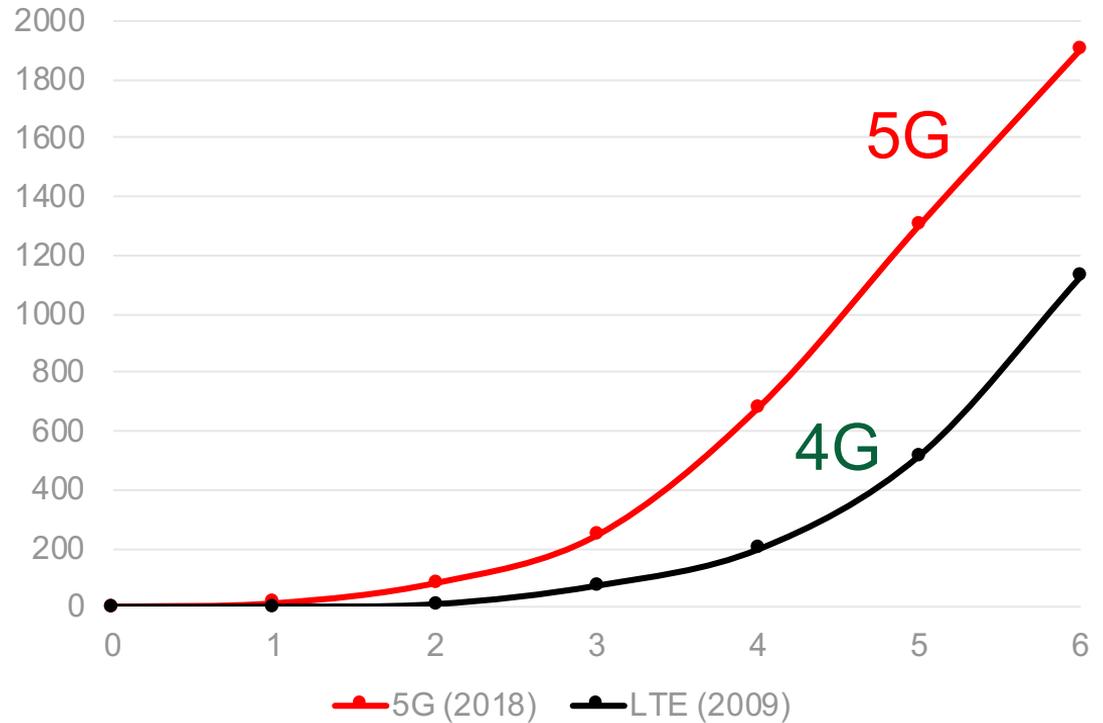
5G network launches in Burj Khalifa as Etisalat plans 1,000 5G towers across the UAE by year-end





## Global subscriptions first years of deployment (million)

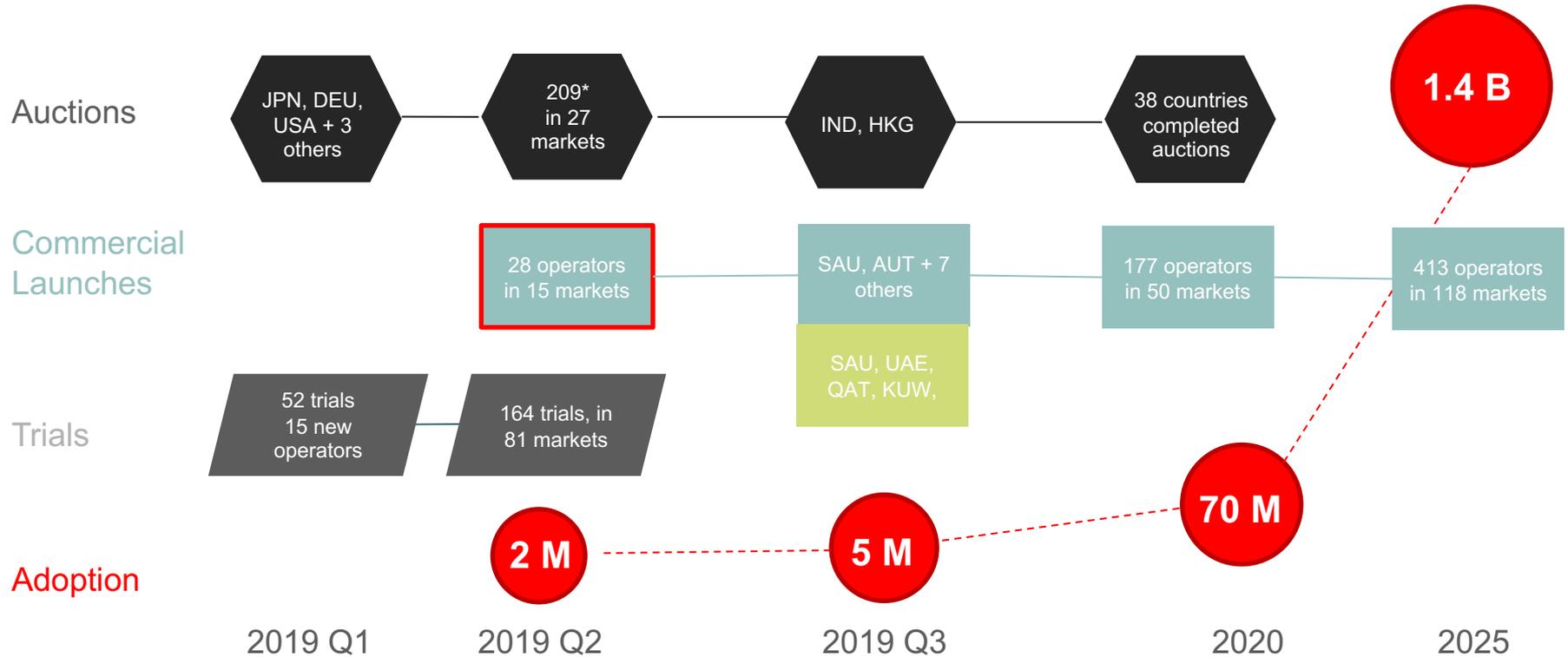
Source: Ericsson



5G subscription take-up is expected to be faster than 4G



# 5G momentum: a global outlook



\*Includes regional US winners



# Where is 5G now?

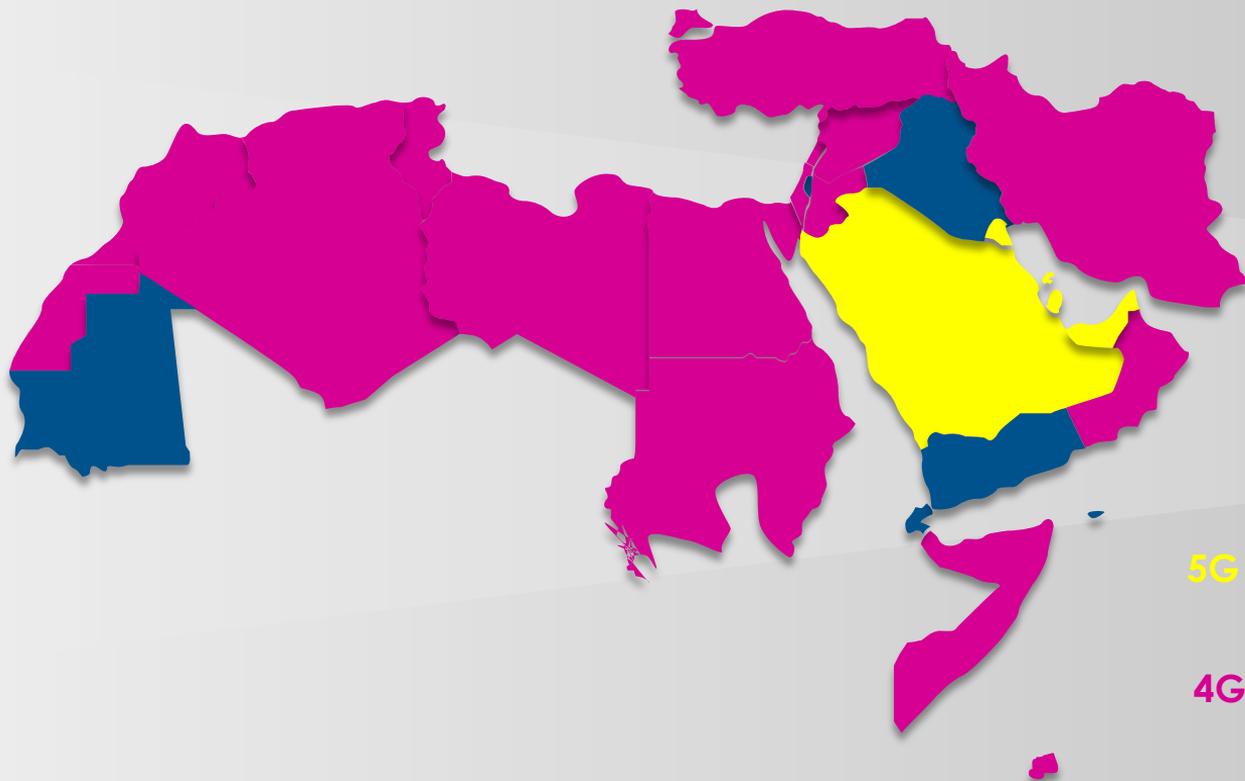


33 operators in  
17 markets

600 MHz  
700 MHz  
3.5 GHz  
26 GHz  
28 GHz



# MENA, a technologically diverse region



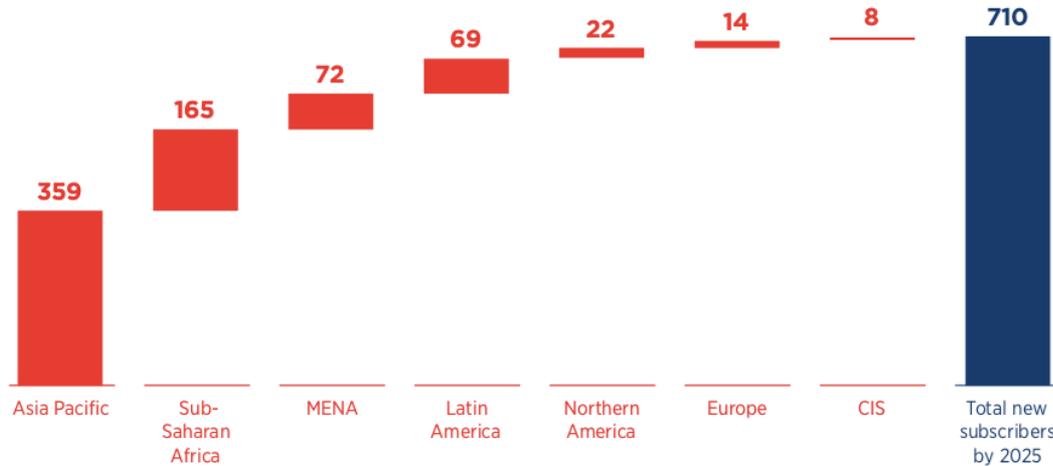
5G	5	Bahrain-Kuwait-Qatar-Saudi Arabia-UAE
4G	15	Algeria-Comoros-Egypt-Iran-Israel-Jordan-Lebanon-Libya-Morocco-Oman-Somalia-Sudan-Syria-Tunisia-Turkey
3G	5	Djibouti-Iraq-Mauritania-Palestine-Yemen

As Oct. 2019

# Growth markets; smart connections

Some 700 million new subscribers by 2025; half from Asia Pacific

Million

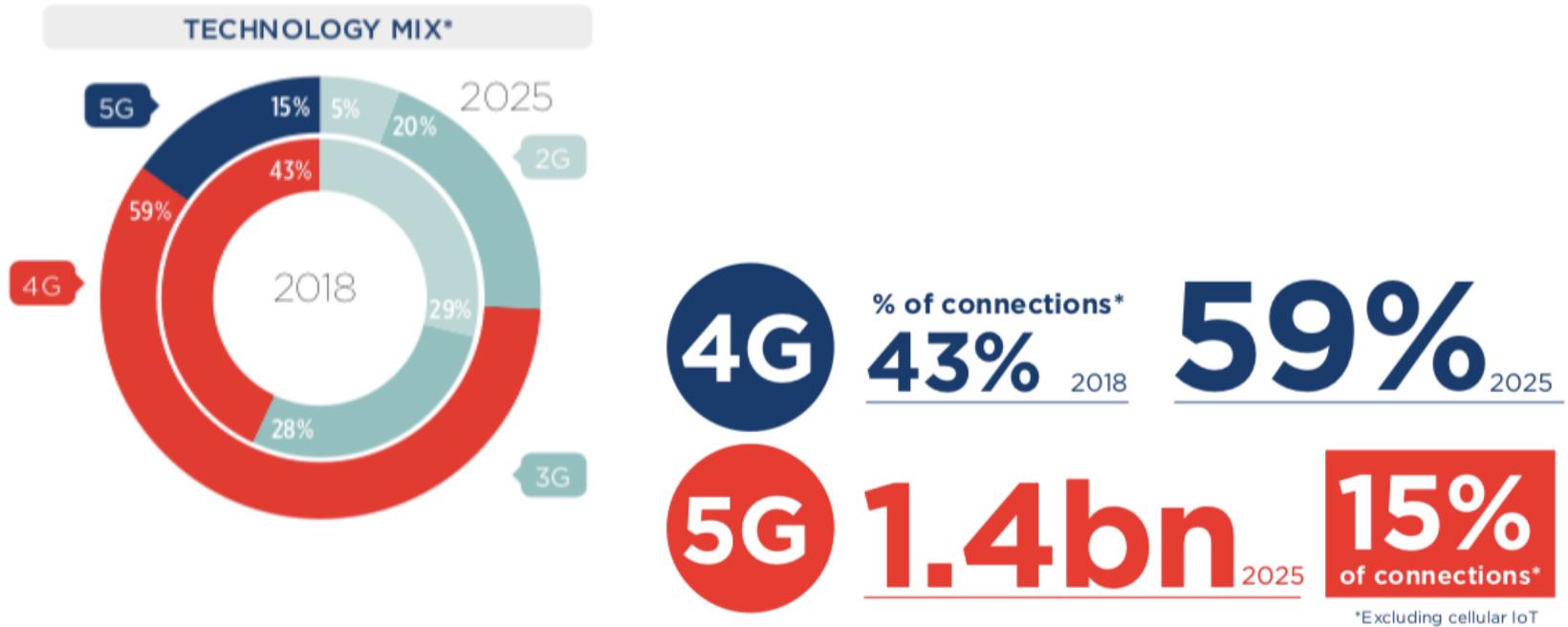


**Smartphones**  
% of connections\*



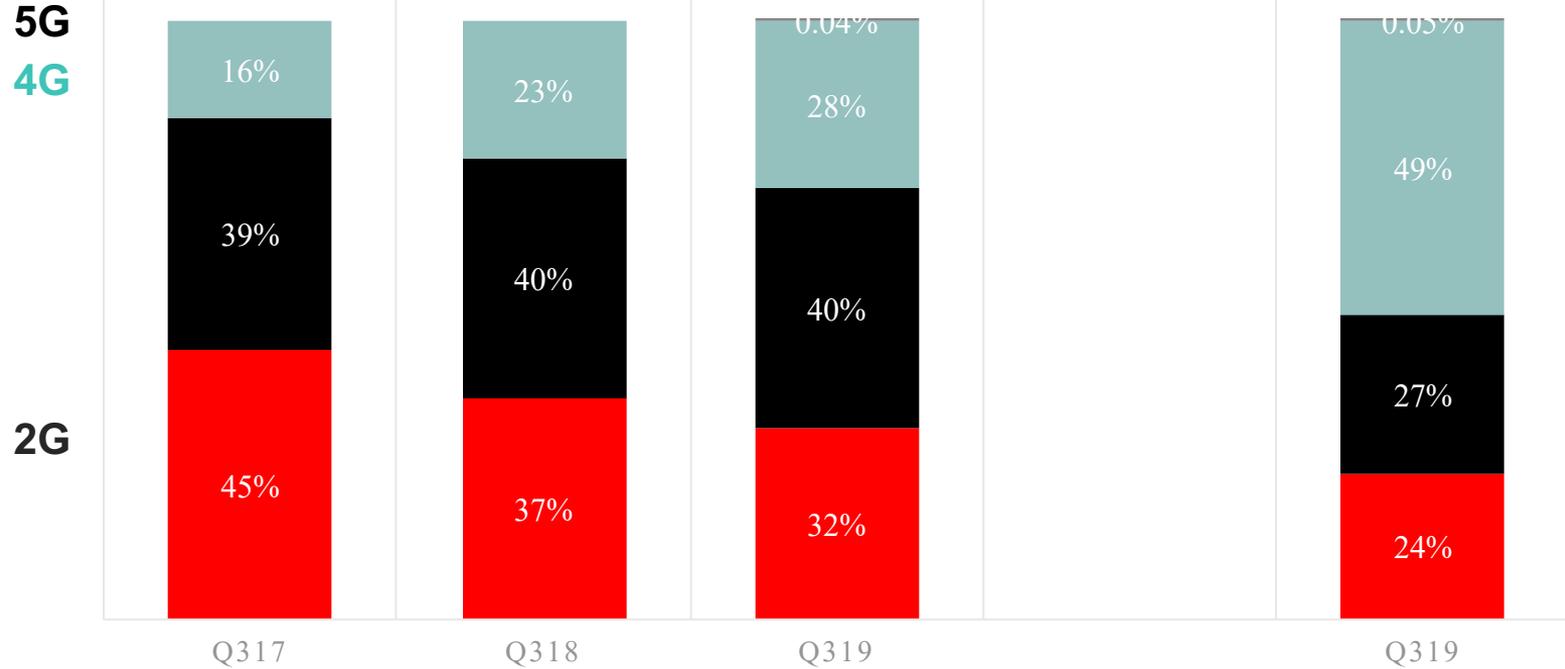


# 5G era: massive data demand





# MENA market trends: 5G debuts; transition to 4G gains momentum





# MENA Regional Update Q3 2019

**Total connections**

**665m**

Including

**21m** licensed cellular IoT  
connections

**Smartphone connections**

**369m**

**55%** adoption rate

**ARPU per connection**

**\$6.60**

Global average

**\$9.70**



# The world is on the cusp of the 5G era

Commercial 5G services has become a reality in MENA: several operators have launched commercial 5G network services in 2019



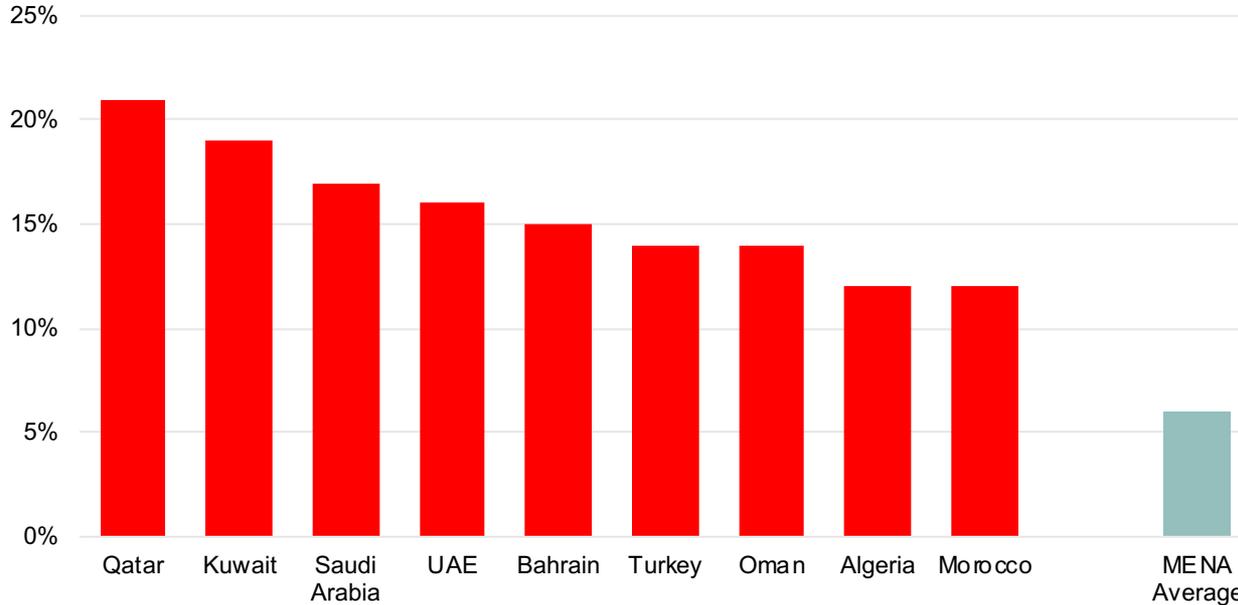


# 5G and the future connectivity landscape

45.3 million 5G connections in MENA by 2025, representing 5.6% of total connections

## 5G as a % of total connections

Source: GSMA Intelligence





# What to expect for 5G in MENA?

- **2019 is year zero for 5G in MENA, with 12 operators in five GCC countries launching commercial 5G services** during the year. Early 5G use cases centre on **enhanced mobile broadband** and **fixed wireless access (FWA)** services as operators take an **evolutionary approach to 5G** through the deployment of non-standalone networks.
- The **2020s** will see **increased focus on enterprise services**, helped by continued **government investment in smart city initiatives**. Operators keen to maximise the incremental revenue opportunity from the enterprise segment will look to invest in standalone 5G network architecture and collaborate with enterprises across verticals to develop use cases.



# GSMAi insights on CAPEX

- **Several operators in the region recorded increases in capex intensity of up to twofold during Q3 2019, compared to the same period in 2018.**
- **For operators in GCC countries, this was driven by investment in 5G infrastructure; more than 12,000 5G sites will have been deployed across the region by the end of 2019.**
- **For operators in frontier markets, such as Etisalat Egypt and Djezzy, capex is primarily being driven by investment in 4G capacity and coverage expansion to cope with growing demand for mobile data services.**



# GSMAi insights on Revenues

- Operators in several countries, notably **Turkey, Egypt and Saudi Arabia**, reported **strong organic revenue growth in Q3 2019**, underpinned by **increasing data usage**. However, the situation was different in other markets, where mobile revenue growth remained in negative territory or at best in low single digits, reflecting intense competition and increasing market saturation.
- The impact of **5G services on mobile revenues** will likely be **limited until adoption reaches mass-market levels** and operators offer higher value services, beyond basic connectivity, to drive consumer spend.

**New REPORTS**

**[gsma.com/mobileeconomy](https://gsma.com/mobileeconomy)**

**& Region in Focus Middle East and North Africa, Q3  
2019**

**We also hope to see you at  
Mobile 360 MENA here in Dubai on Nov 26 & 27**



**Thank you for your attention.**

**[jabbassi@gsma.com](mailto:jabbassi@gsma.com)**