



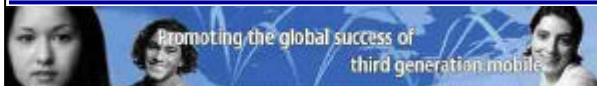
UMTS Forum activities

Perspectives of an industry body

Jean-Pierre Bienaimé

Chairman, UMTS Forum

www.ums-forum.org



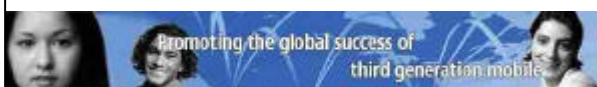
ITU Regional Seminar
Qatar 29 September – 01 October 2003



About The UMTS Forum

Promoting the global success of UMTS / WCDMA

- The world's only industry association uniquely committed to the global success of UMTS mobile systems
- Cross-sector membership comprises operators, manufacturers, regulators, application developers, research organisations and IT industry players from 40 countries worldwide
- Unites all market players on a peer-to-peer basis



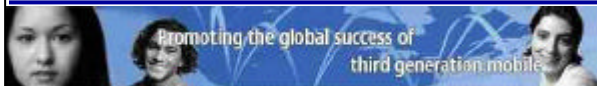
ITU Regional Seminar
Qatar 29 September – 01 October 2003

About The UMTS Forum



Selected areas of activity – specified in UMTSF work plan

- Dedicated to study market and technology aspects of UMTS/WCDMA
- Charting the evolution roadmap to UMTS for mobile operators
- Delivers market focused inputs to other key stakeholders e.g. investors, standardisation bodies (ref. ETSI / 3GPP, ITU), media etc
- Issues under study include IMT-2000 spectrum, market aspects, IMS, WLAN, TDD
- Current study (2003) into “Social Shaping” – analysis of UMTS and the customer experience, leading to recommendations to operators, manufacturers and developers of 3G services & applications



ITU Regional Seminar
Qatar 29 September – 01 October 2003

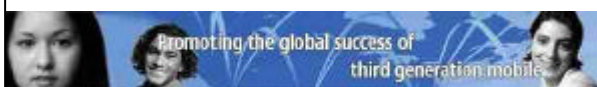
UMTS Forum Activities



Promotion and Education

- Regular briefings to international media and financial analysts to provide objective, accurate information on technical and commercial progress of UMTS
- Presence at more than 65 worldwide industry events annually
- Regular publication of authoritative, widely read reports and white papers on key topics relating to UMTS. Issues include: market, technology, spectrum, regulation, sociological issues

New White Paper published...
MOBILE EVOLUTION: SHAPING THE FUTURE
...available for download from web site



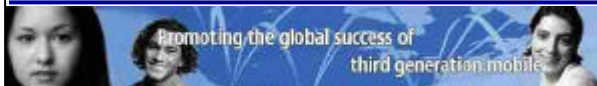
ITU Regional Seminar
Qatar 29 September – 01 October 2003

IMT-2000 Spectrum



Spectrum Aspects Group

- Spectrum Aspects Group (SAG) studies availability and harmonisation of global spectrum for IMT-2000 and beyond
- Traffic characteristics studies for IMT-2000 spectrum, including a review of utilisation studies on terrestrial and satellite spectrum
- Influence ITU-R WP8F and regional groups (CEPT ECC PT1) regarding harmonised frequency arrangements for UMTS
- Ongoing studies re. WLAN spectrum for regions e.g. Latin America
- Lobbying inputs to CISPR regarding noise emission limits across GSM1800/UMTS bands
- Inputs to World Radiocommunication Conference...



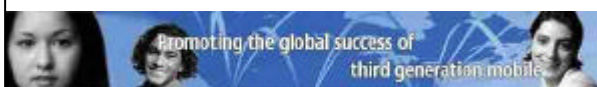
ITU Regional Seminar
Qatar 29 September – 01 October 2003

IMT-2000 Spectrum



WRC 2003 Key Messages (June 2003):

- UMTS Forum believes that for terrestrial IMT-2000, it is vital that the band 2500-2690 MHz (which was identified by WRC-2000 for IMT-2000 on a global basis) must be unconstrained by interference from Broadcasting Satellite Systems in relevant parts of the band.
- Furthermore, it is crucial that an effective regulatory and technical regime exists to underpin long term planning of terrestrial IMT-2000 in the 2.5 GHz band.
- UMTS Forum believes that for IMT-2000 to develop to its full potential it is essential for WRC-03 to propose an appropriate agenda item for WRC-07 to review and take any necessary action on results of further studies on the spectrum requirements for the future development of IMT-2000.



ITU Regional Seminar
Qatar 29 September – 01 October 2003

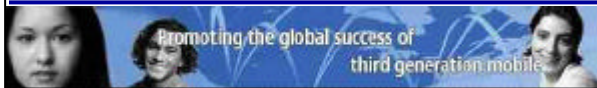
Other Activities



Additional areas of study

Technical and implementation issues relating to UMTS, including:

- the roles of 'complementary' technologies such as WLAN and use of TDD spectrum for mobile solutions by operators.
- Investigation into the use of IP in a mobile environment (IMS)
- Studies on security awareness and its relevance in a UMTS environment
- Potential importance of a mobile Top Level Domain (mTLD)
- Review of settlements, billing and charging issues for UMTS.



ITU Regional Seminar
Qatar 29 September – 01 October 2003

Close Co-operation with ITU

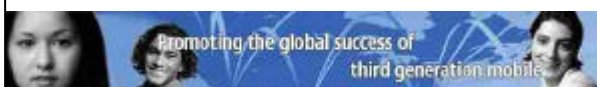


Regular participation of UMTS Forum in ITU sector groups:

ITU-T: participation in Informal Summits (e.g. Informal Forum Summit, San Francisco, July 2003)

ITU-D: involvement in ITU regional seminars and other contributions

ITU-R: work of UMTSF Spectrum Aspects Group with ITU experts



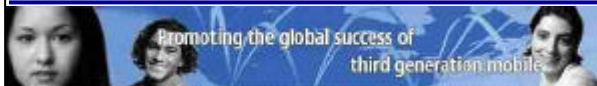
ITU Regional Seminar
Qatar 29 September – 01 October 2003

2003! Worldwide UMTS Update



UMTS is happening now...

- WCDMA customers now reaching 1 million worldwide
- Licensing largely complete in Europe, continues in other world regions. >98% of 3G licenses awarded so far (approaching 120 operators) specify WCDMA
- Operator deployment plans characterised by soft launches, followed by commercial introductions during 2003/2004
- Growing choice and diversity of terminal designs from leading vendors
- Increasing numbers of customers already experiencing a first taste of "3G-like" services via GPRS and other 2.5G networks



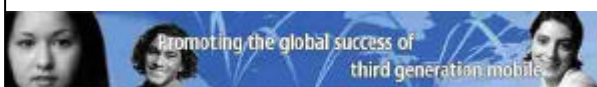
ITU Regional Seminar
Qatar 29 September – 01 October 2003

GSM: The #1 Choice Globally



GSM success story continues

- GSM will reach 1 billion subscribers later in 2003: More than 500 GSM networks in 195 countries worldwide
- GSM demonstrates the importance of OPEN STANDARDISATION to benefit the market
- Large GSM subscriber base drives economies of scale for operators, manufacturers and end users
- GSM is fastest growing mobile system in the Americas; also rapid GSM growth in other countries e.g. China
- GSM provides a clear evolutionary path via GPRS to WCDMA/UMTS



ITU Regional Seminar
Qatar 29 September – 01 October 2003

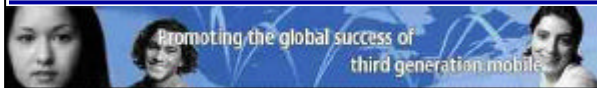
3G Technology Choices



Almost 120 operators worldwide have selected WCDMA

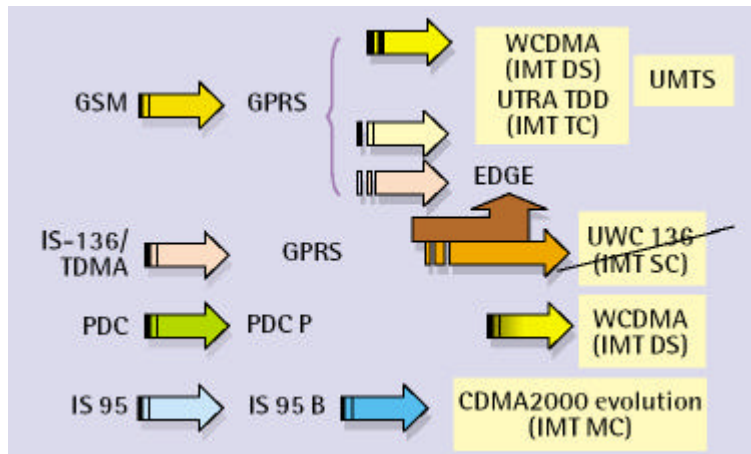
ITU RSPC IMT-2000 interfaces		Standards organisations
IMT-2000 DS	UMTS component paired WCDMA frequency bands (FDD mode)	3GPP
IMT-2000 TC	Components of unpaired frequency bands: UMTS (TDD mode) TD-CDMA and radio interface proposed by China TD-SCDMA	3GPP CCSA (TD-SCDMA)
IMT-2000 MC	CDMA2000: CDMA network evolution	3GPP2
IMT-2000 SC	Evolution of IS-136 (TDMA) networks primarily deployed in US - UWC 136	3GPP
IMT-2000 FT	DECT	ETSI

Source: ART

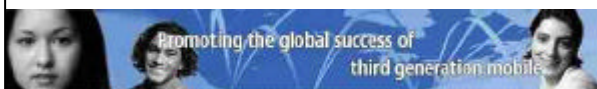


ITU Regional Seminar
Qatar 29 September – 01 October 2003

Operator Migration Choices



Source: ART



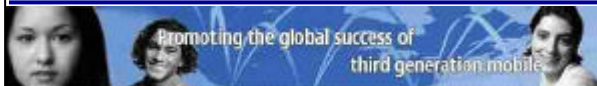
ITU Regional Seminar
Qatar 29 September – 01 October 2003

UMTS: The benefits to operators



Optimising resources delivers an economic advantage

- UMTS builds on investments in GSM providing a network optimisation opportunity for operators
- UMTS gives operators additional capacity to support more subscribers (especially in urban centres) as well as greater speeds and ability to support new multimedia services
- UMTS operators can retain existing 2G core network, IT and service platforms; can also re-use existing sites and site sharing
- UMTS is the catalyst that will generate increased competition, giving operators the opportunity to increase differentiation in their service offerings



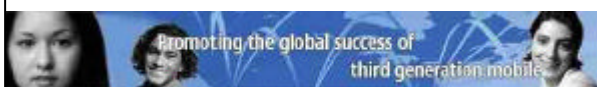
ITU Regional Seminar
Qatar 29 September – 01 October 2003

The value proposition



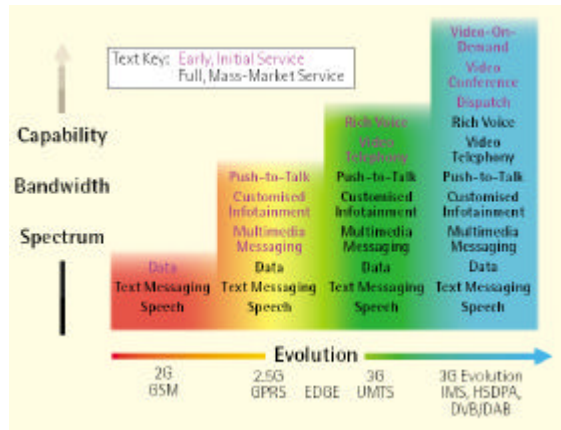
Laying the foundations for long-term growth

- UMTS allows operators to add additional network capacity at a cost up to 8 times lower than providing incremental 2G capacity
- UMTS will not in itself significantly increase ARPU in the short term, but it will provide an opportunity for operators to strengthen their free cash flows
- UMTS will generate new revenues in the medium/long term when all actors (clients, operators, service providers, media/content developers etc) have assimilated this new technology
- UMTS gives the opportunity for operators to reduce the proportion of investments in relation to total turnover
- UMTS is 'future proofed' – safeguards against future overcrowding in today's second generation networks



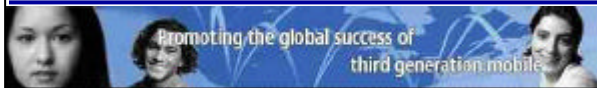
ITU Regional Seminar
Qatar 29 September – 01 October 2003

WCDMA: Built for the future



Future enhancements to WCDMA

- High Speed Downlink Packet Access (HSDPA) increases downlink speeds to 10 Mbps
- IP Multimedia Subsystem (IMS) will provide advanced IP capabilities for Multimedia Services
- Interworking with other networks such as DVB and DAB will take advantage of content offerings that can be delivered efficiently to small form factor terminals.



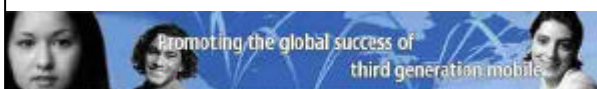
ITU Regional Seminar
Qatar 29 September – 01 October 2003

Conclusions



- UMTS builds on existing investments in GSM, benefiting from large economies of scale and providing a stable, open platform for developers of new services and applications
- WCDMA technology offers additional capacity in fresh radio spectrum at lower incremental cost compared with GSM, allowing operators to support new customers and new services
- Enhanced 3G: roadmap for WCDMA “future-proofs” operator investments through the next decade and beyond.

UMTS/WCDMA is the most cost effective path to 3G for more than 75% of the world's wireless market



ITU Regional Seminar
Qatar 29 September – 01 October 2003