



ERICSSON

THE CRITICAL ROLE OF THE POLICY-MAKER AND THE REGULATOR IN THE NETWORKED SOCIETY

CTO Forum
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Abuja, Nigeria



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ERICSSON AT A GLANCE



40%

Of the world's mobile calls are on Ericsson networks

950M

Subscribers in networks that we manage

30 000

Number of patents

2.5B

Subscribers on Ericsson supported networks

110 255

Number of employees

34B

USD, Net sales 2012

180

Countries we operate in



AFRICA SITUATION ANALYSIS



GDP Growth Rate – 5.4%
GDP per capita – \$3 204



Mobile penetration – 68.79%
Internet penetration – 16%
Mobile broadband – 11%



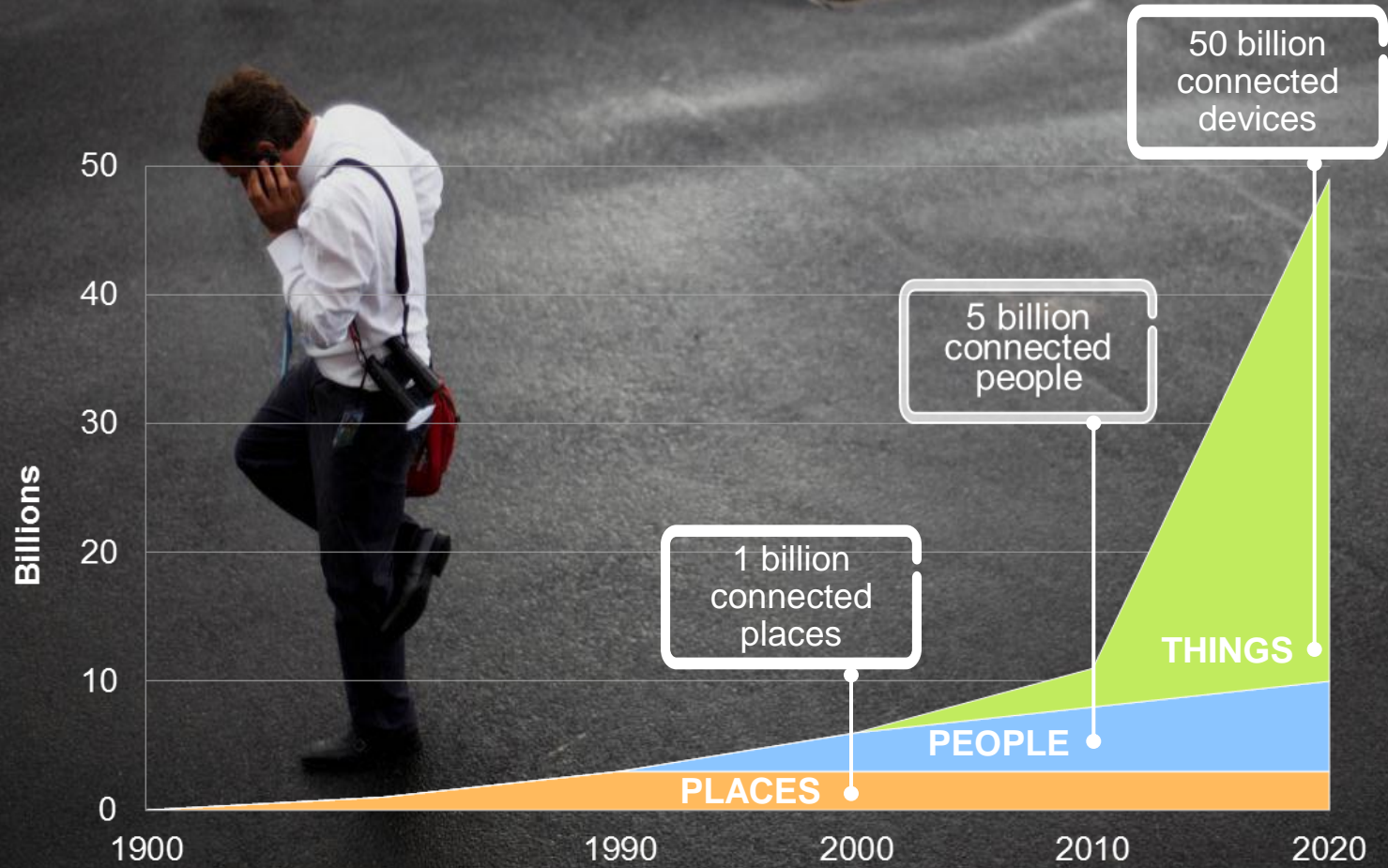
Total population – 1.06 Billion
Pop density p/sq km – 36/sq km
Percentage urban – 40%



Adult – 59%
Youth – 72.9%



PACE OF CHANGE



LIVING IN THE NETWORKED SOCIETY

Today

- › 6.5 bn subscriptions
- › 1.5 bn mobile broadband
- › 1.1 bn smartphones
- › 80% data of mobile traffic

2018

- › 9.3 bn subscriptions
- › 6.5 bn mobile broadband
- › 3.3 bn smartphones
- › 12 times traffic

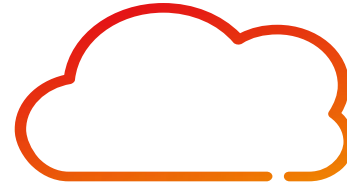
Source: Ericsson Mobility Report, June 2013



MOBILITY



BROADBAND



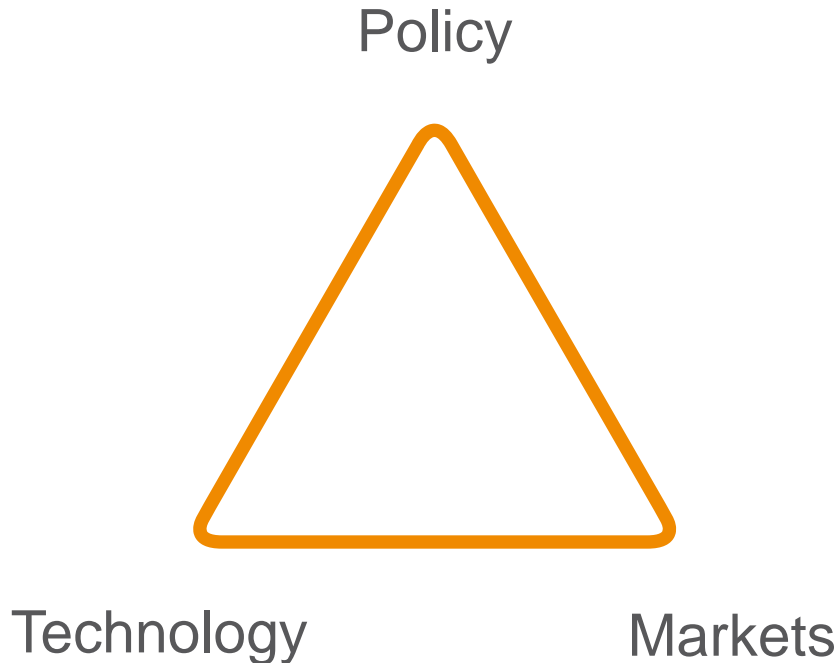
CLOUD

MAKING SENSE OF IT ALL: THE NETWORKED SOCIETY

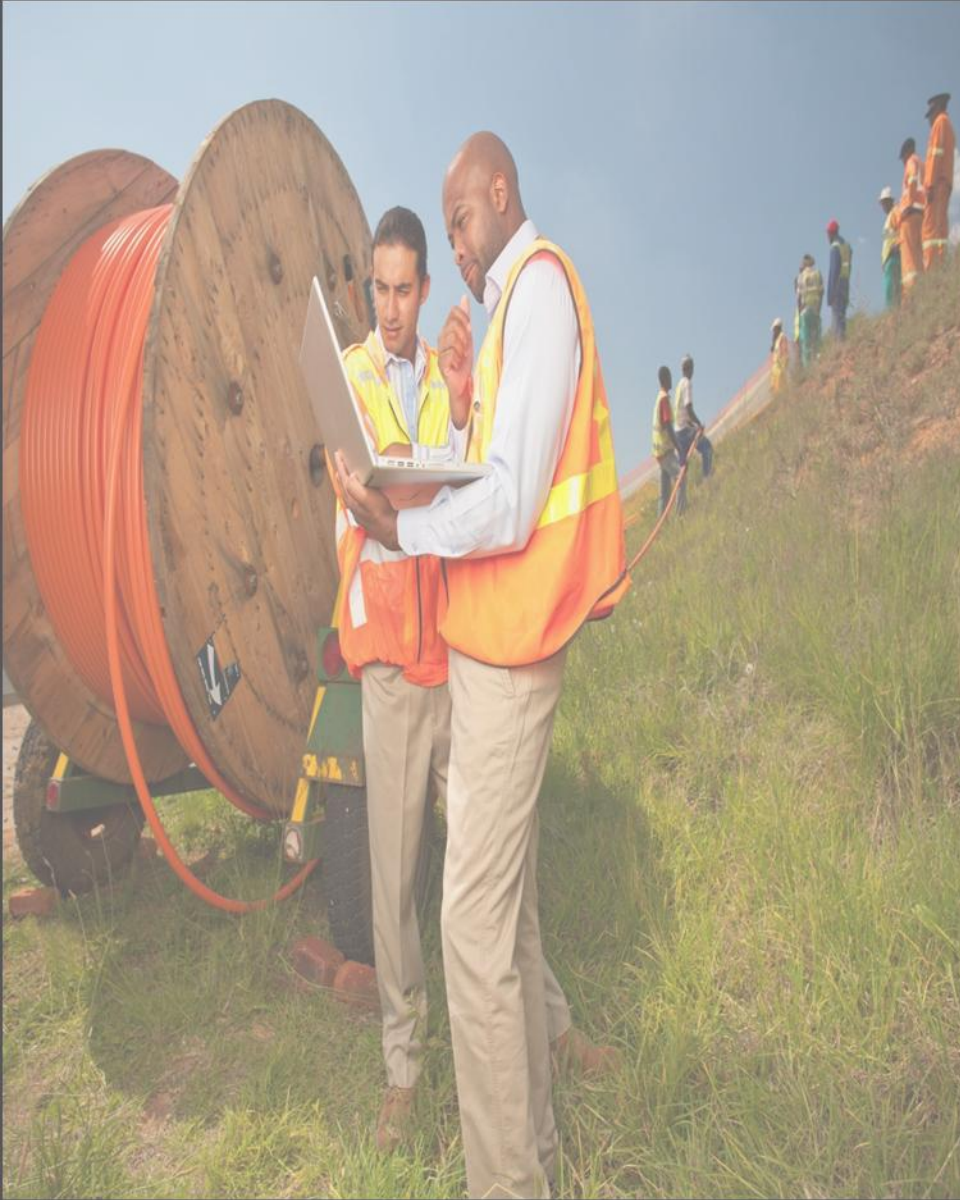


- › Ericsson acknowledges the considerable efforts taken by the policy-makers and the regulators in creating a conducive environment for mobile growth in the region, amongst others:
 1. Market liberalization
 2. Broadband Policies becoming the norm
 3. Collective adoption of regional positions & common proposals at ITU conferences
- › However, industry's main concerns can be summarized in the following points:
 1. Legacy or outdated policy frameworks
 2. ICT Infrastructural deficiency – gap in policy and funding
 3. Diminishing policy and regulatory certainty in some markets

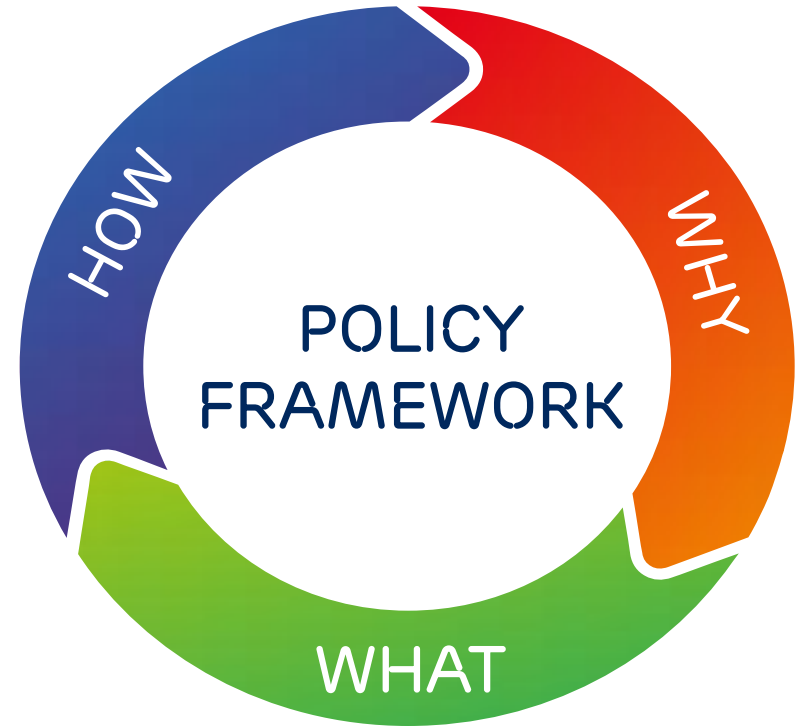
IMPLICATIONS FOR POLICY



- › Each informs, and is informed by the other two
- › Policy and regulatory certainty are crucial to market and technology development, e.g.
 - Harmonized spectrum policies increase scale and decrease costs
 - Minimizes cross-border interference and allows global roaming
 - Technology neutral licensing allows the industry to evolve without barriers



POLICY FRAMEWORKS



RECOMMENDATIONS



1. Prioritize broadband and ICT development

2. Streamlined regulatory environment

3. Harmonized, efficient use of frequency spectrum

4. Comprehensive monitoring network for deployment

5. Incentivize Innovation & Promote Investments



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