



MENA MOBILE ECONOMY:

Trends and best practices in stimulating 5G enabled economic growth

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About GSMA

14 OFFICES WORLDWIDE

SHANGHAI SAN FRANCISCO BEIJING NAIROBI NEW DELHI

LONDON DUBAI ATLANTA BRUSSELS BARCELONA HONG KONG BRASLIA BUENOS AIRES

Intelligently Connecting Everyone and Everything to a #BetterFuture

nearly **9.3 bn** MOBILE CONNECTIONS WORLDWIDE (including IoT)

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 NEARLY **400** COMPANIES is the broader mobile ecosystem

Driving industry programmes that add value to the digital economy

The GSMA works to deliver a regulatory environment that creates value for consumers by engaging regularly with:

MINISTERS OF TELECOMS TELECOMS REGULATORY AUTHORITIES INTERNATIONAL & NON-GOVERNMENTAL ORGANISATIONS

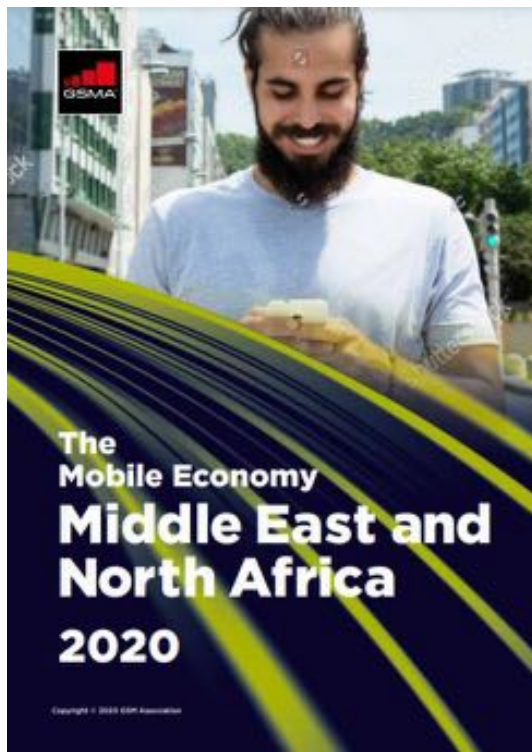
The world's leading mobile industry events, MWC Barcelona, MWC Los Angeles, MWC Shanghai and the Mobile 360 Series, together attract nearly **200,000** people from across the globe each year



Check out our new GSMAi reports

www.gsma.com/mena

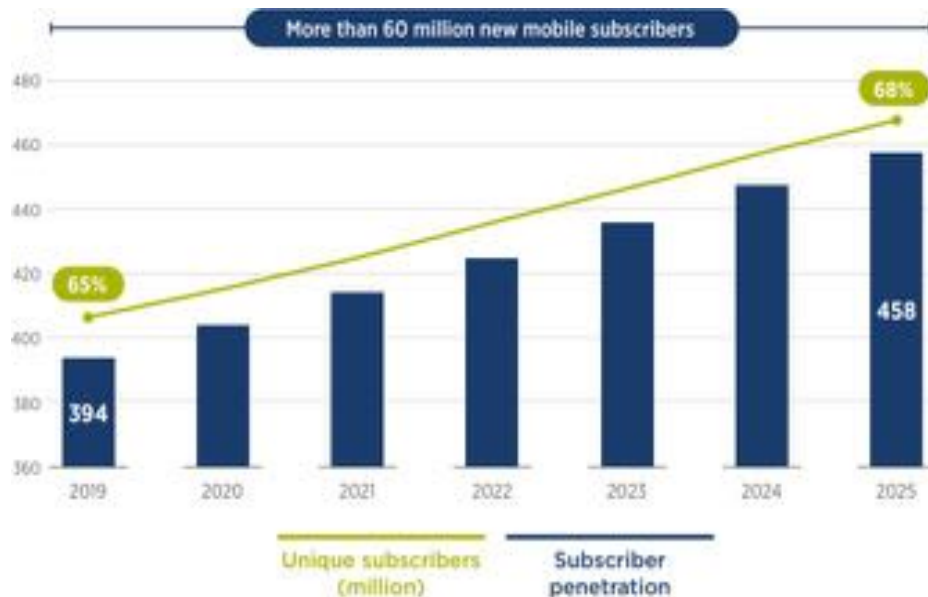
www.gsmaintelligence.com





Key milestones in the next five years

- 2020:** 400 million unique mobile subscribers
- 2021:** 250 million 4G connections. 4G overtakes 3G to become technology
- 2022:** 10 million mobile 5G connections
- 2023:** 500 million smartphone connections
- 2024:** 600 million MBB connections
- 2025:** Almost 60 million 5G connections

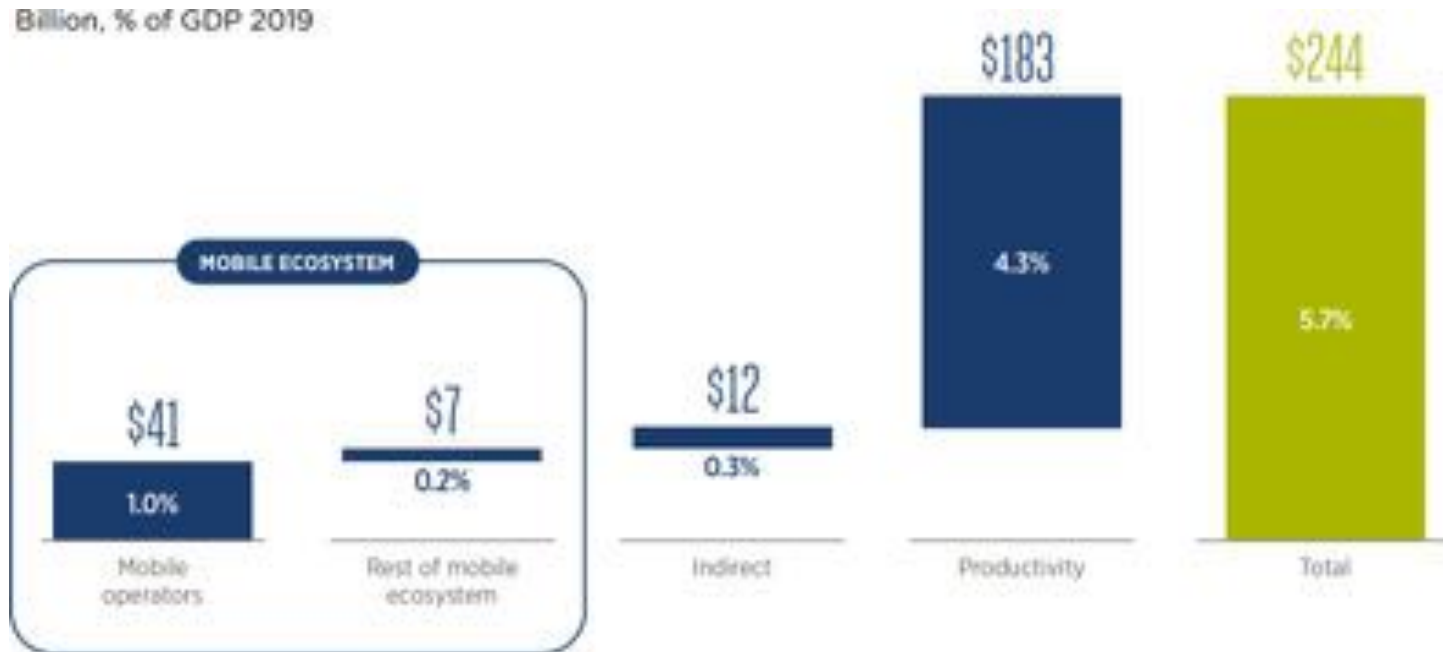


Source: GSMA Intelligence



Mobile industry contributed \$244bn to MENA economy in 2019

Billion, % of GDP 2019

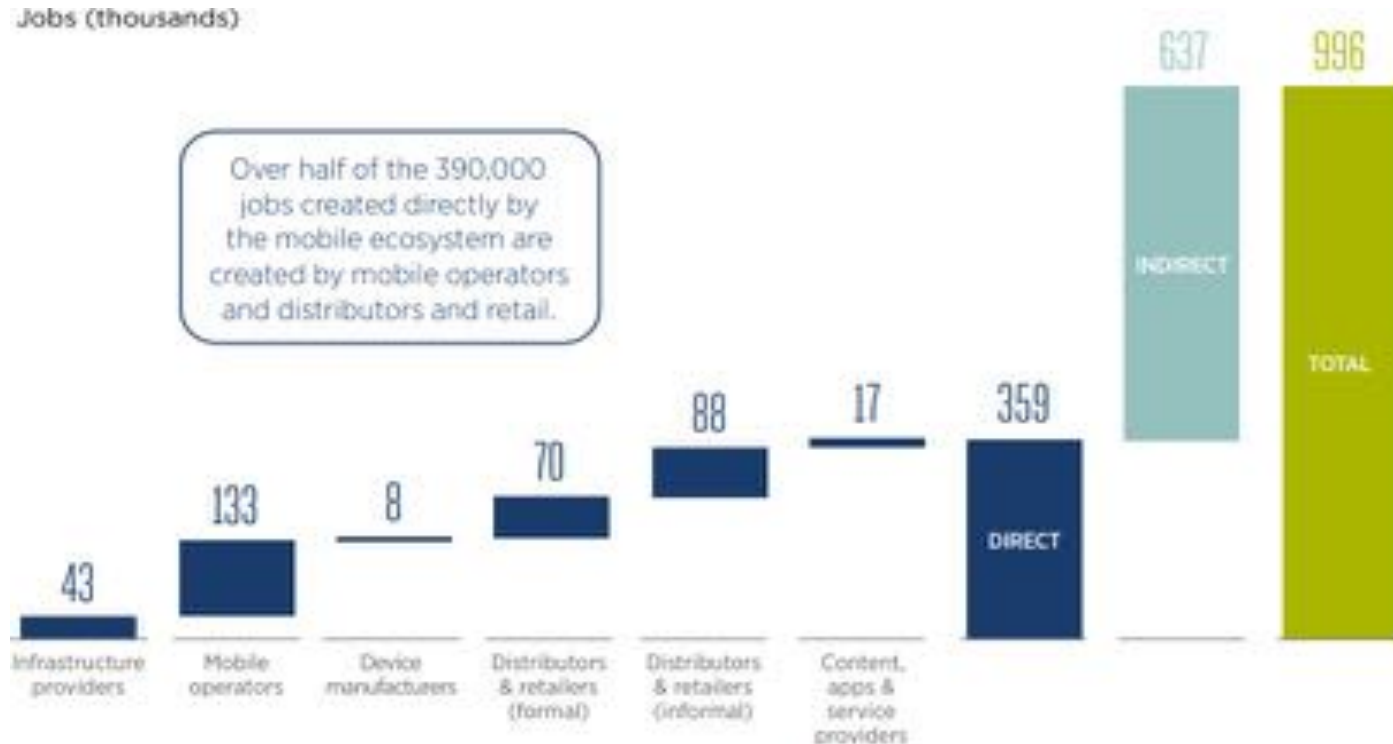


Note: totals may not add up due to rounding



The mobile ecosystem supports nearly 1m jobs directly and indirectly across MENA

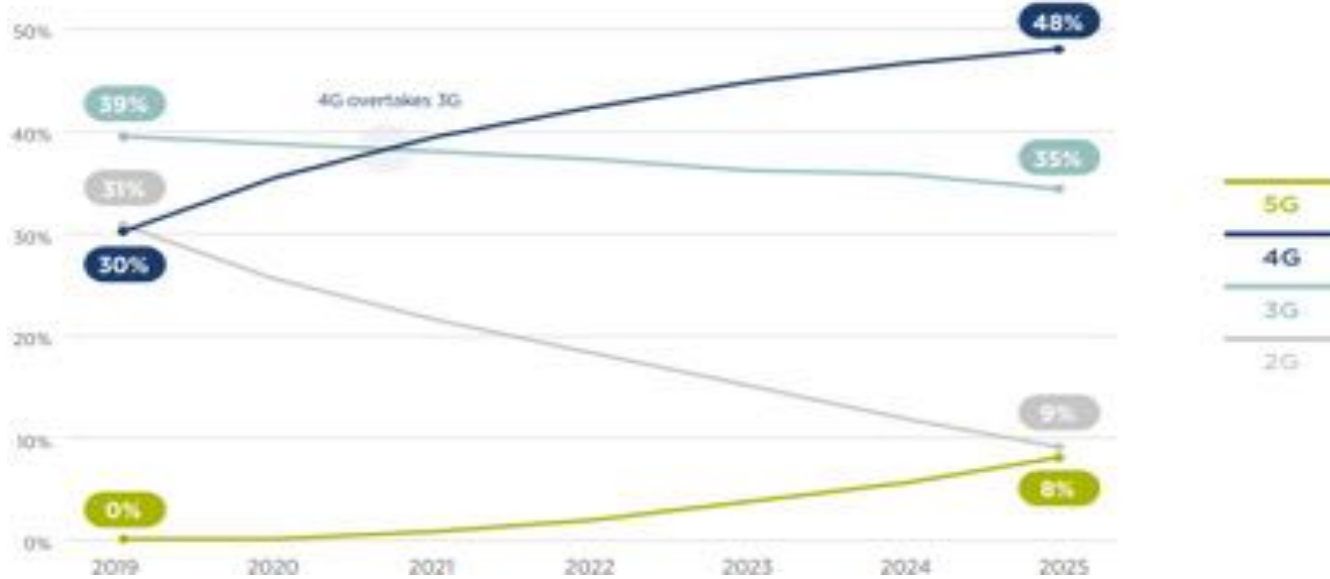
Jobs (thousands)





4G growth to continue as the 5G journey begins

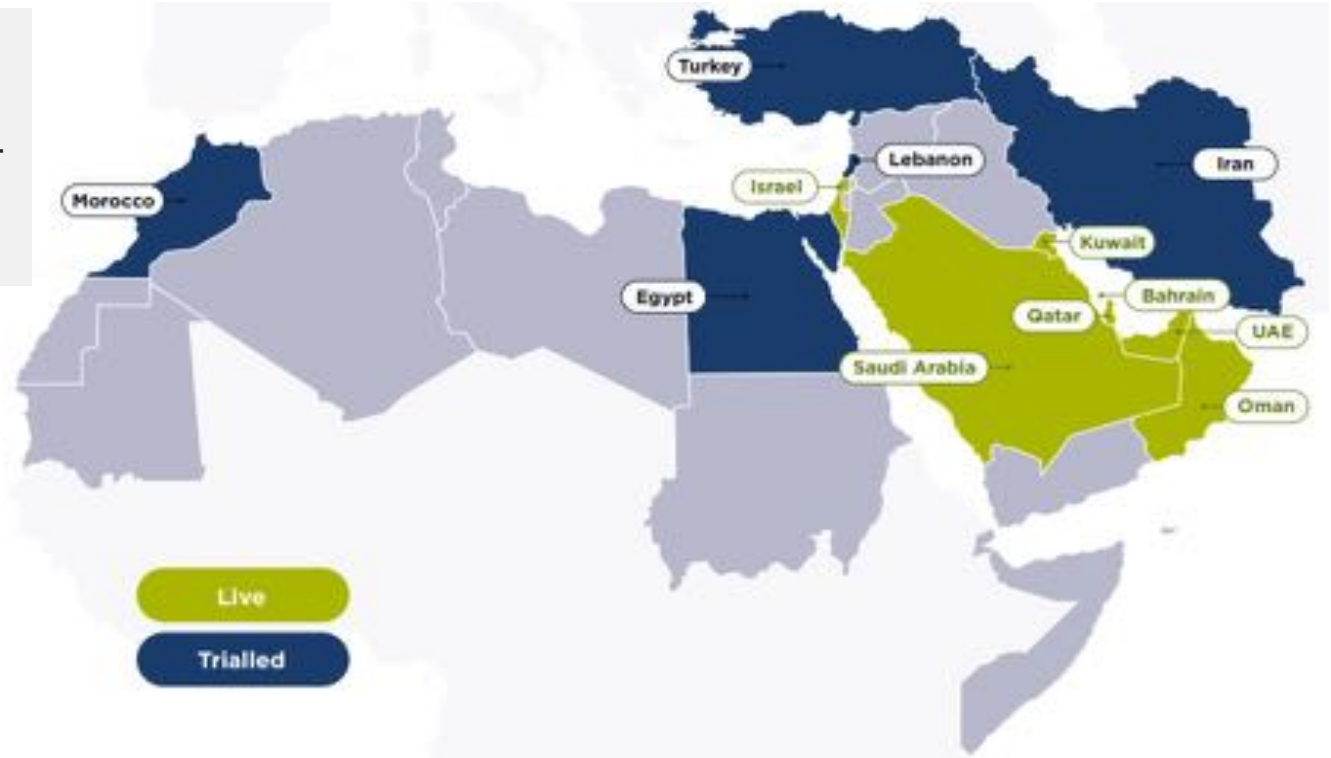
By 2025, almost half of connections will be 4G and close to 10% will be 5G
Percentage of connections (excluding licensed cellular IoT)





5G activities set to gain momentum in non-GCC Arab states

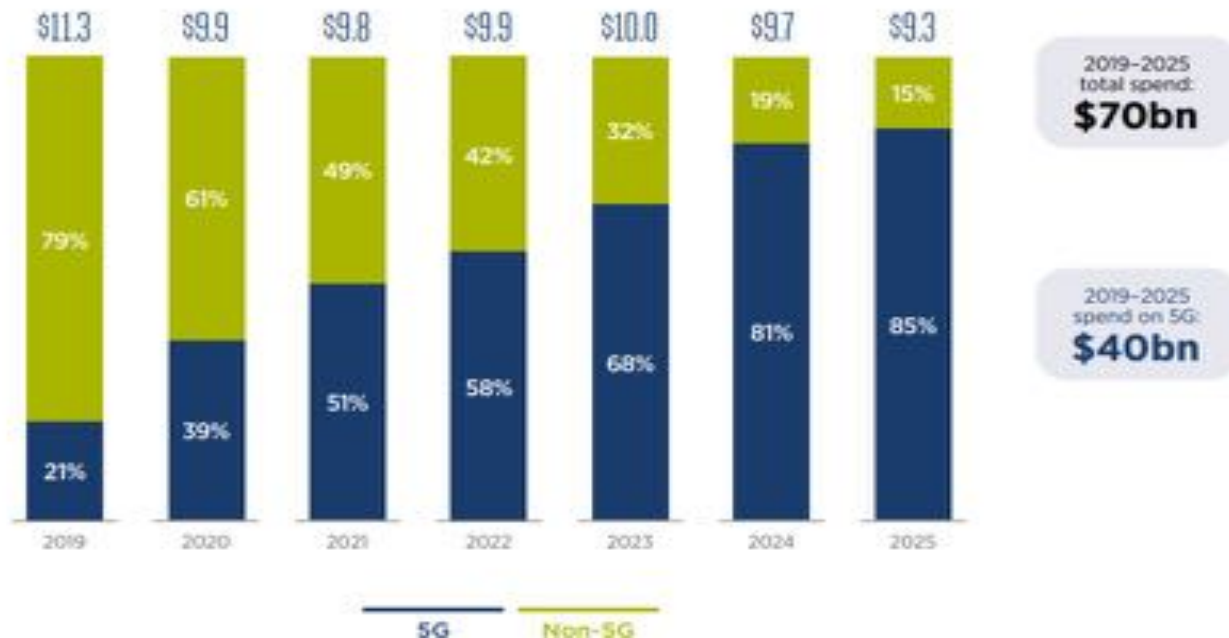
The financial impact of 5G in MENA by 2034 is expected to equal \$15.4 billion, representing a 1.1% increase in GDP.





By 2025, 5G will account for 85% of capex in MENA

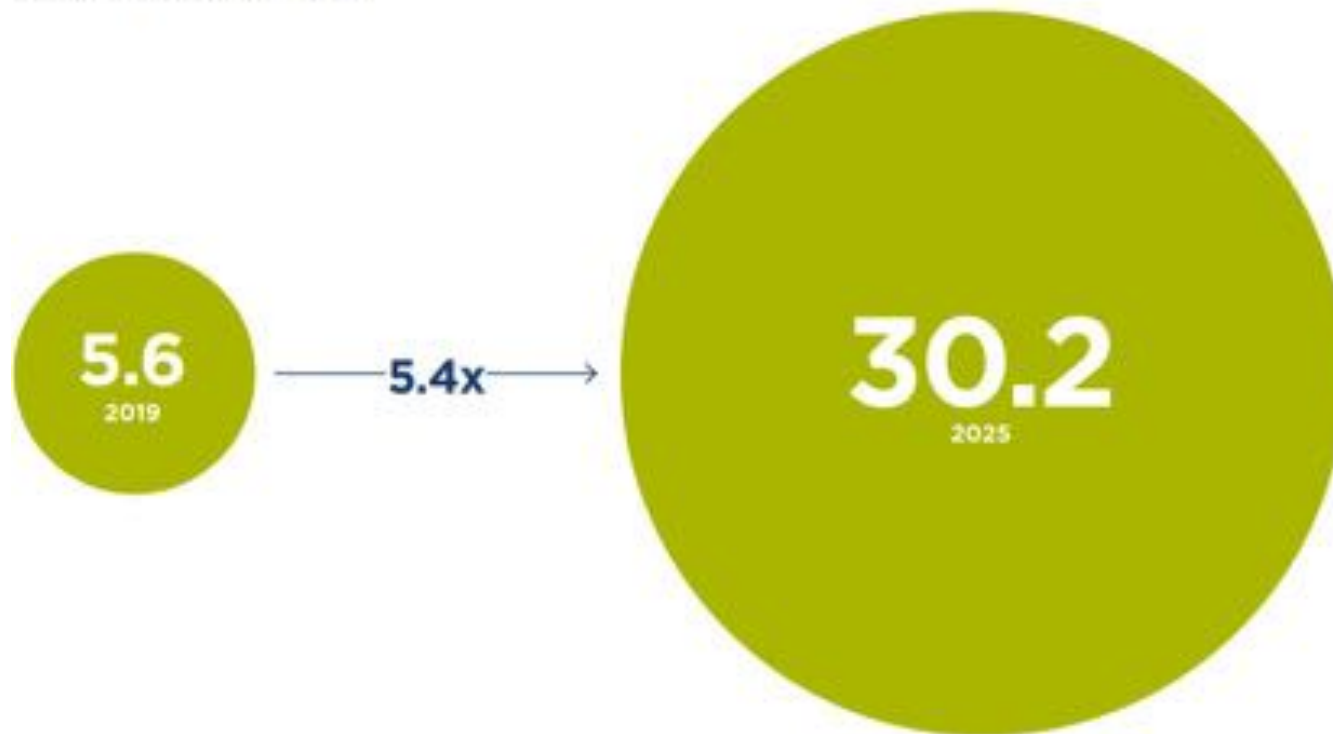
Capex (billion, percentage of total capex)





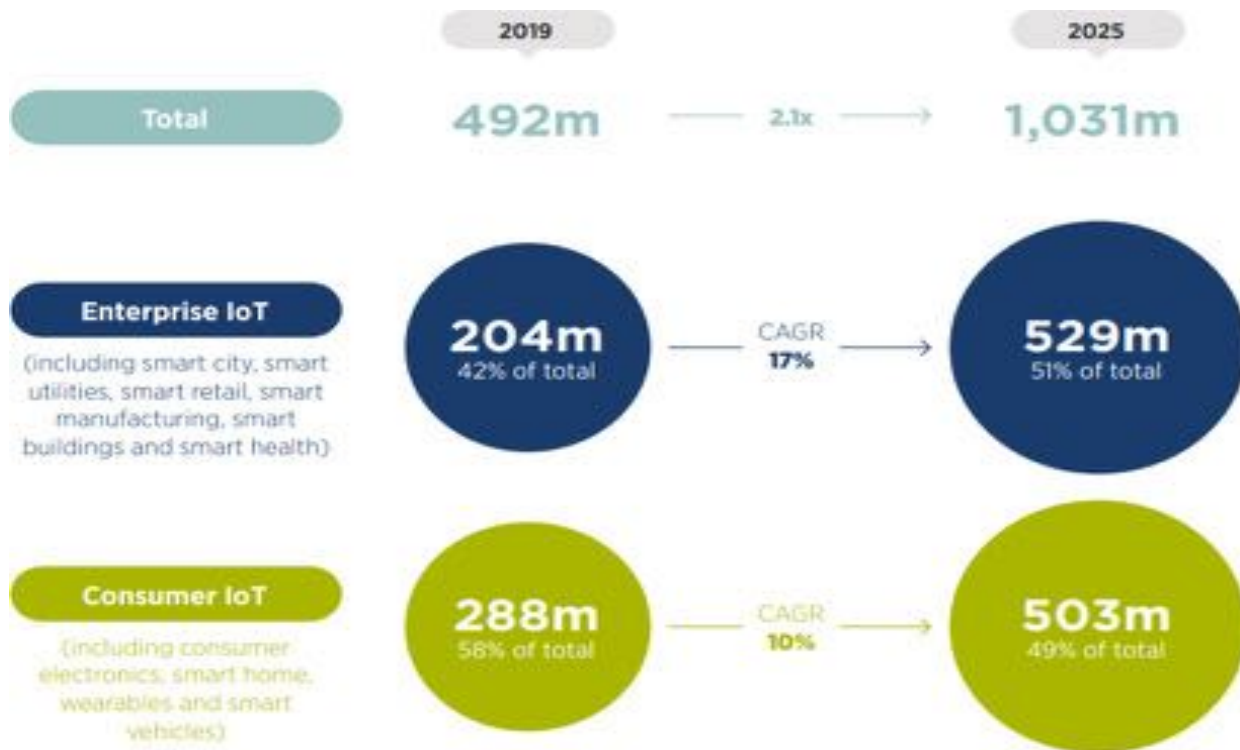
4G and 5G will drive mobile data traffic in MENA

GB per subscriber per month





5G will enable new IoT solutions for enterprises and consumers





Stable and predictable policies encourage long-term investments

Providing robust and secure connectivity to individuals, businesses and governments has never been of greater importance than it is at this critical time and mobile network operators are working round the clock to ensure that communications networks are providing the necessary backbone infrastructure for communication, alternative work arrangements, supporting the emergency services as well as information dissemination.

- **Technology neutrality**
- **Net neutrality**
- **Financial sustainability of mobile operators**
- **Network capacity / network stability needs Spectrum & Fair use policies**



Thank you

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