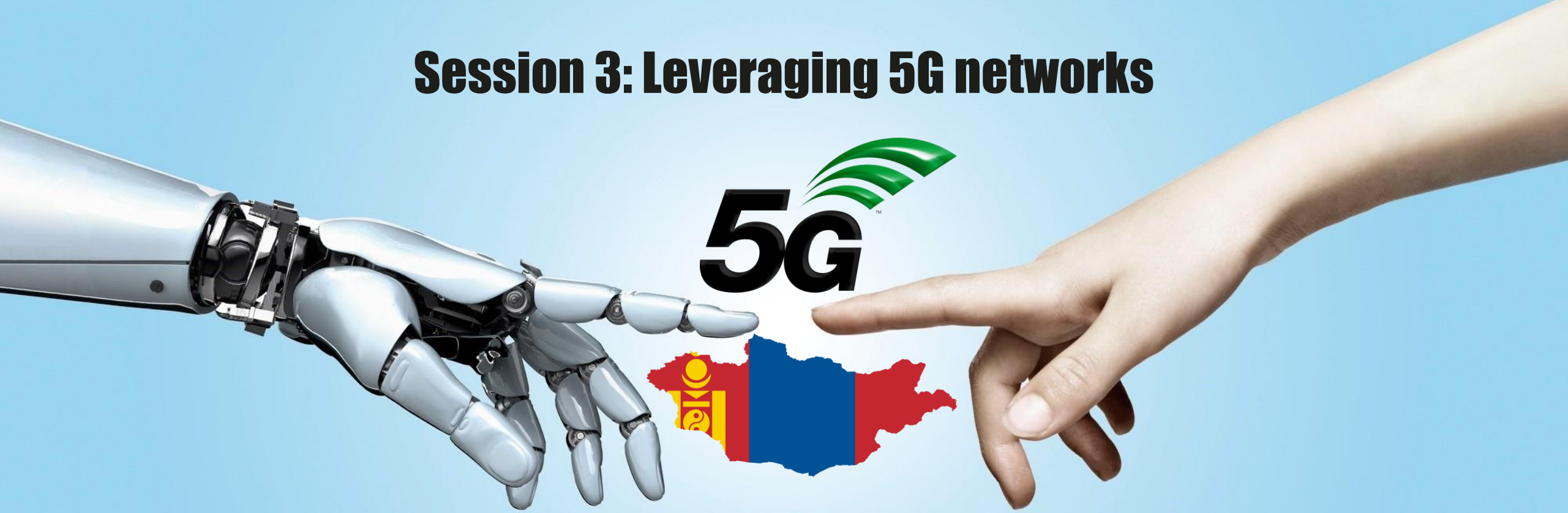


# Regulatory Roundtable

# Next Generation Regulations in the Digital Era

## Session 3: Leveraging 5G networks



Abhinav Purohit  
Chief Expert, Strategy & Consulting,  
ME & CA Region  
24 Sep 2025



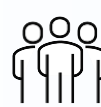
# Rapid 5G Industry Development brings Continuous Business Success

## Fast Industry Development

 **6.5Mn+**  
5G Base Station

 **3800+**  
5G devices

 **340+**  
5G networks

 **1.9 bn**  
5G subscribers

Source:GSA, Jan.2025

## Blooming Business

### toC: Traffic Contribute Growth

**30~50%**  
Traffic ratio

**2x ↑** 5G vs 4G DOU

**10%-25%↑** ARPU

### toH: Common Strategy of MNOs

**52%**  
5G FWA

**300+** 5G CPE

**50%** Speed-based

### toB: Expands Connections

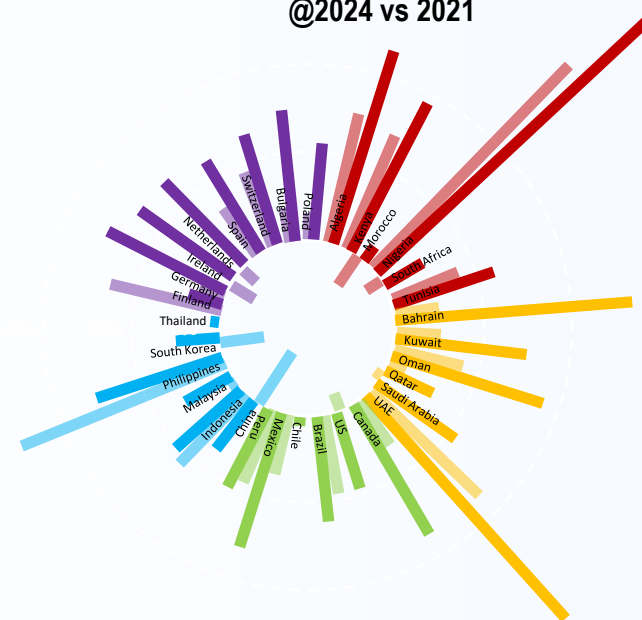
**80 / 97**  
Industries

**3-10X** DICT Revenue

**100+** Use Cases

## Solid Revenue Growth

**97%** of 101 5G Countries' Mobile Data Revenue increased  
**83%** of 101 5G Countries' Mobile Data ARPU increased  
@2024 vs 2021



**\*Growth rate of Single Country's Revenue & ARPU (2024 vs 2021)**

AF ME Americas APAC EU  
Mobile Data Revenue Growth Rate  
Mobile Data ARPU Growth Rate

Source: Omdia 2025

# toC: 5G Promotes Mobile Services Fast Development & Contributes Traffic Growth

## Build User Loyalty

### Mobile Video

Go to HD, Personalized and More Engaging

#### SVOD



300+Mn Paid Users  
2h/day View Time

#### Short Video



1.6Bn MAU  
1h/day View Time

#### Short Drama



100+Mn Users  
0.5h/day View Time

\*SVOD: Subscription Video on Demand  
\*MAU: Monthly Active Users

## Break Location Restrictions

### Mobile Gaming & Live Broadcast

No Device & Location Dependence

#### Mobile Game



2.7 Bn Users  
1h/day Play Time

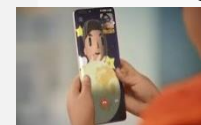
#### Mobile Broadcast



70% Users @Mobile  
2~4 h/day Live Broadcast Time

## Bring Immersive Interaction

### New Calling



20Mn Subscriber  
@CMCC

### Glass Free



8Mn Terminal  
Shipment

### XR Glass



3Mn Rayban Meta  
Shipment @1 year

### AI Terminal



1Mn+ AI  
Applications

DOU

10~20GB

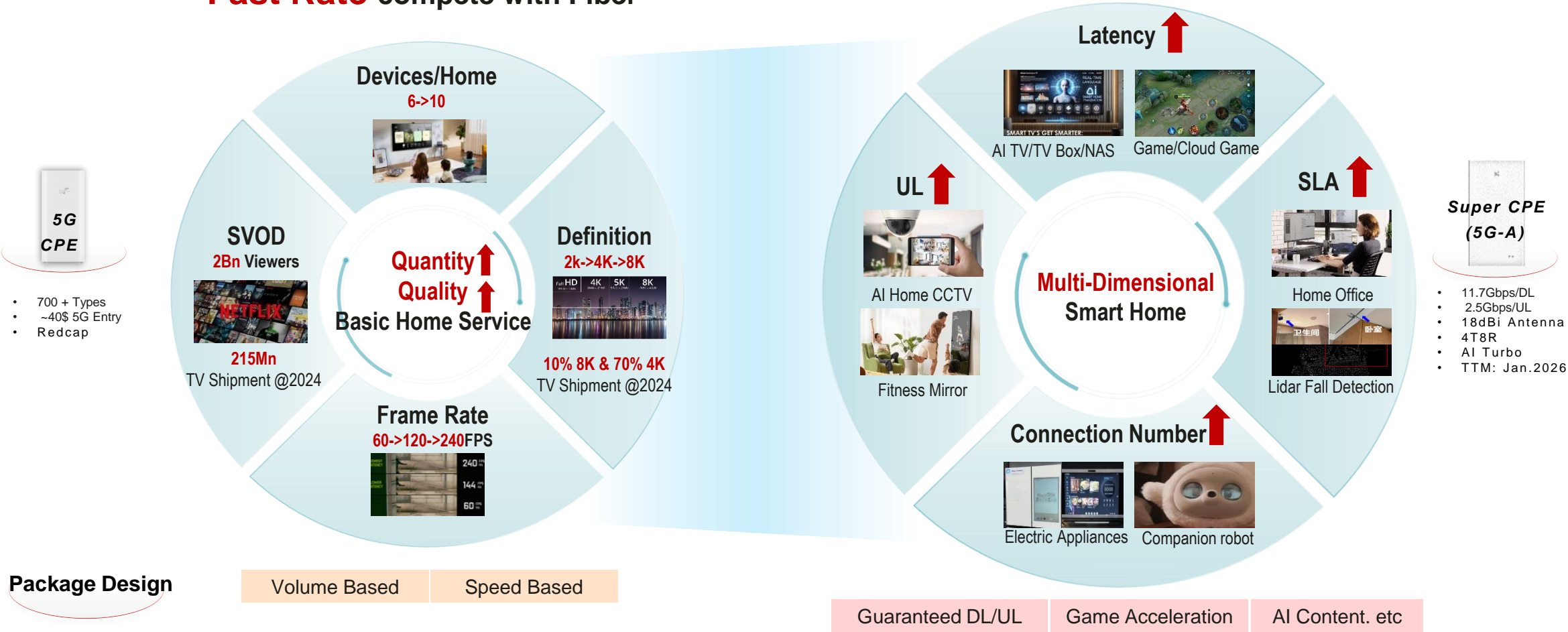
20~30GB

50~100GB

# toH: FWA Upgrade to More Services with Guaranteed Experiences

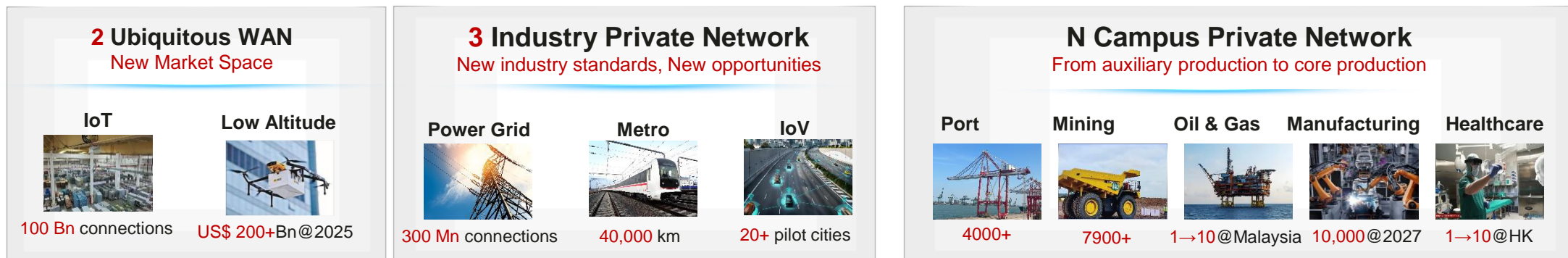
**Fast Rate** compete with Fiber

**Diversified Services** for more ARPU increase

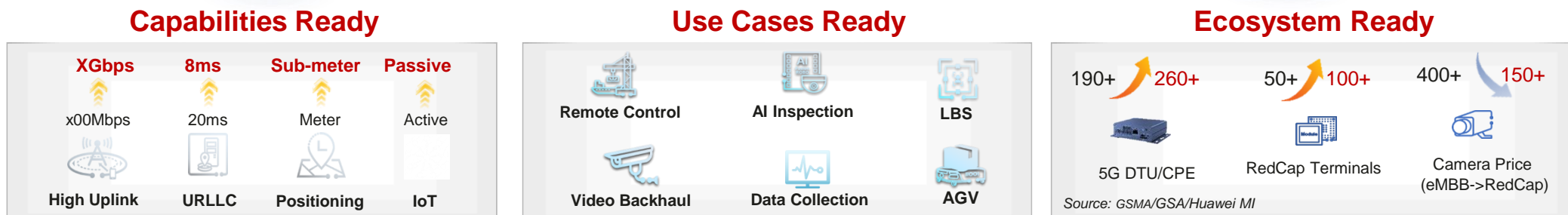
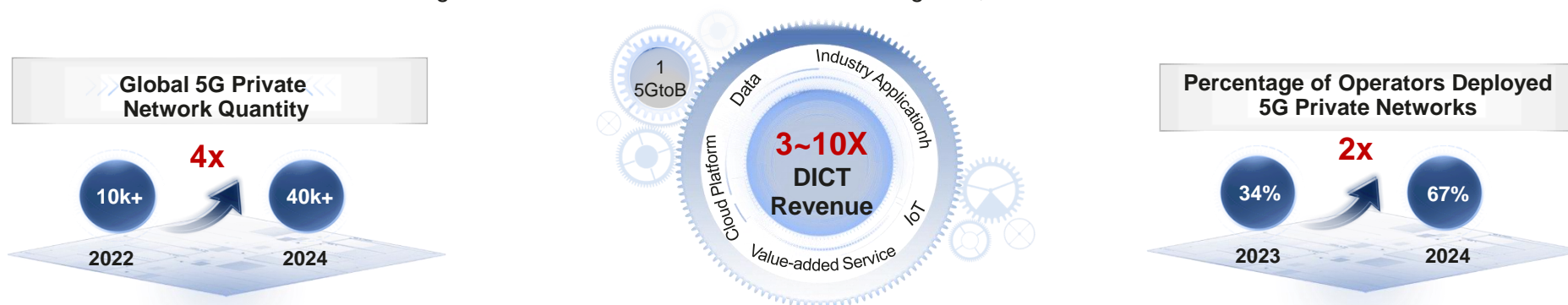




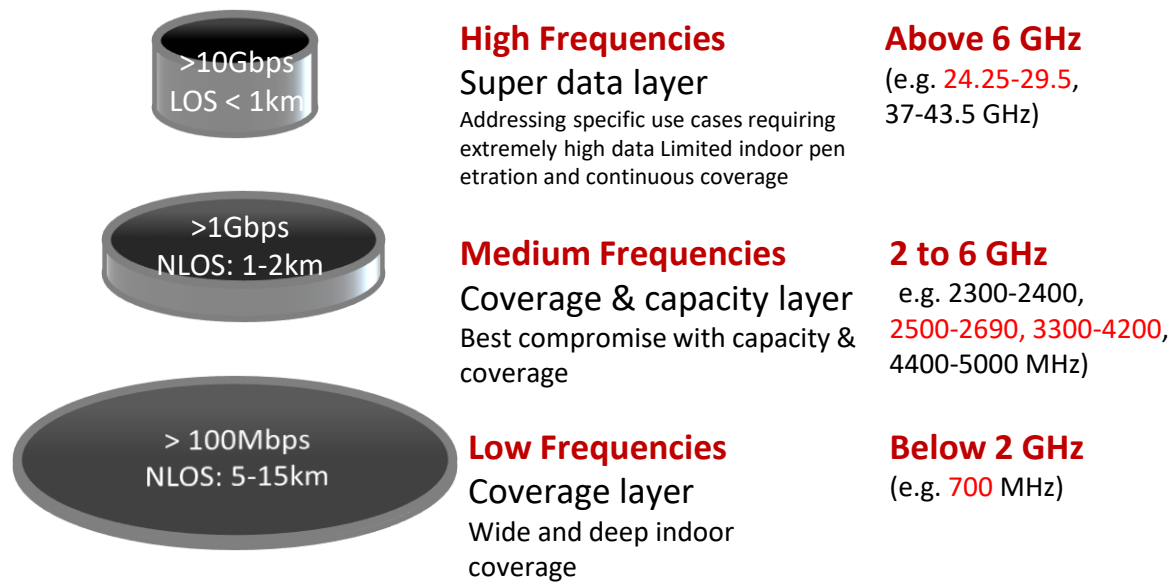
# toB: 5GtoB on the Fast Lane as a New Growth Engine for Operators



5G is integrated into **80/97** national economic categories, Penetration Rate **>80%**



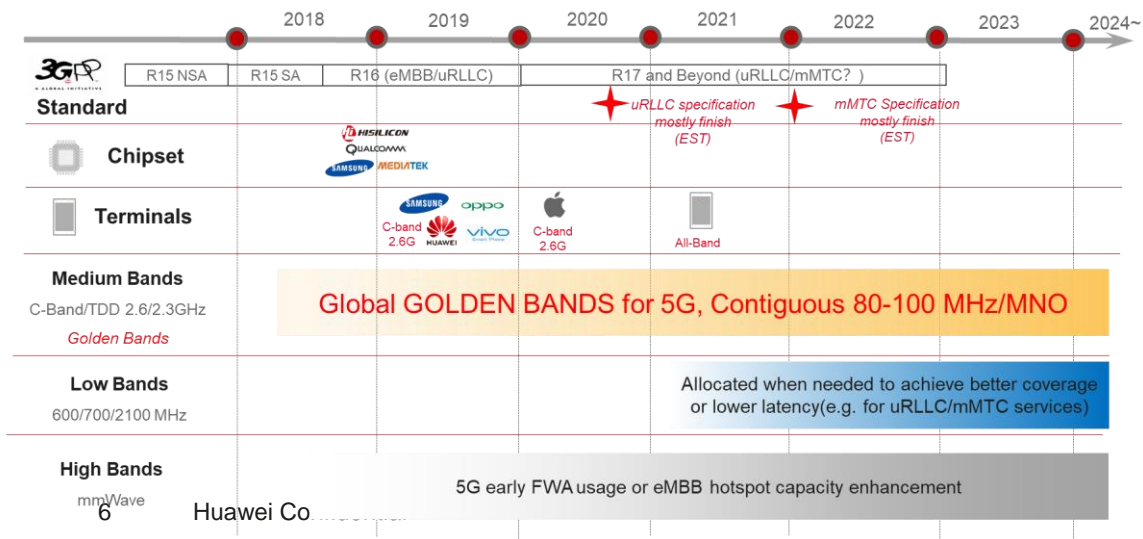
# 5G Regulatory Commercialization Strategy: 5G launch with Mid-Bands First, Other as Required Later



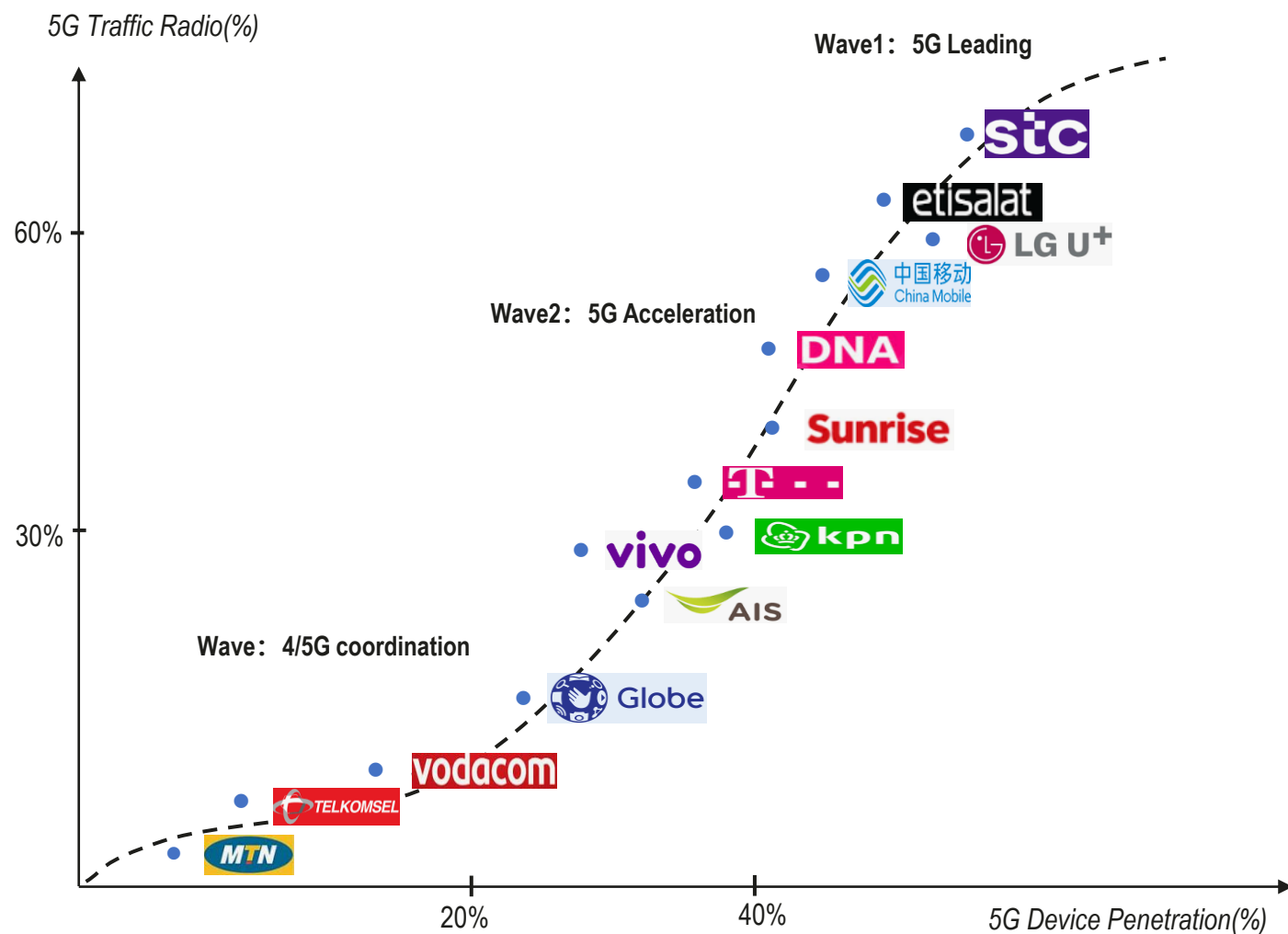
**A multi-layer 5G spectrum** approach can address various usage scenarios and different requirements.

According to the **services requirement** and **maturity of ecosystem**, release 5G spectrum step by step:

- **1<sup>st</sup> Step:** Mid band, contiguous 80-100MHz/MNO @TDD 3.5 (C-Band)
- **2<sup>nd</sup> Step:** Low bands for 5G better coverage and lower latency such as 700MHz, 800Mhz, 900Mhz
- **3<sup>rd</sup> Step:** Mid bands for 5G early FWA usage or eMBB hotspot capacity enhancement such as 2.3Ghz and 2.6Ghz



# 5G Develop in 3 Phases: Continuously Release 5G Full Potential



## Wave1 5G Leading : 5G User Penetration > 40%

- |                                      |   |
|--------------------------------------|---|
| 1. Operator revenue stagnation       | 1. NSA->SA                                    |
| 2. Service homogeneity               | 2. Experience operation, AI services emerging |
| 3. High-end user package degradation | 3. Experience-based as main package           |

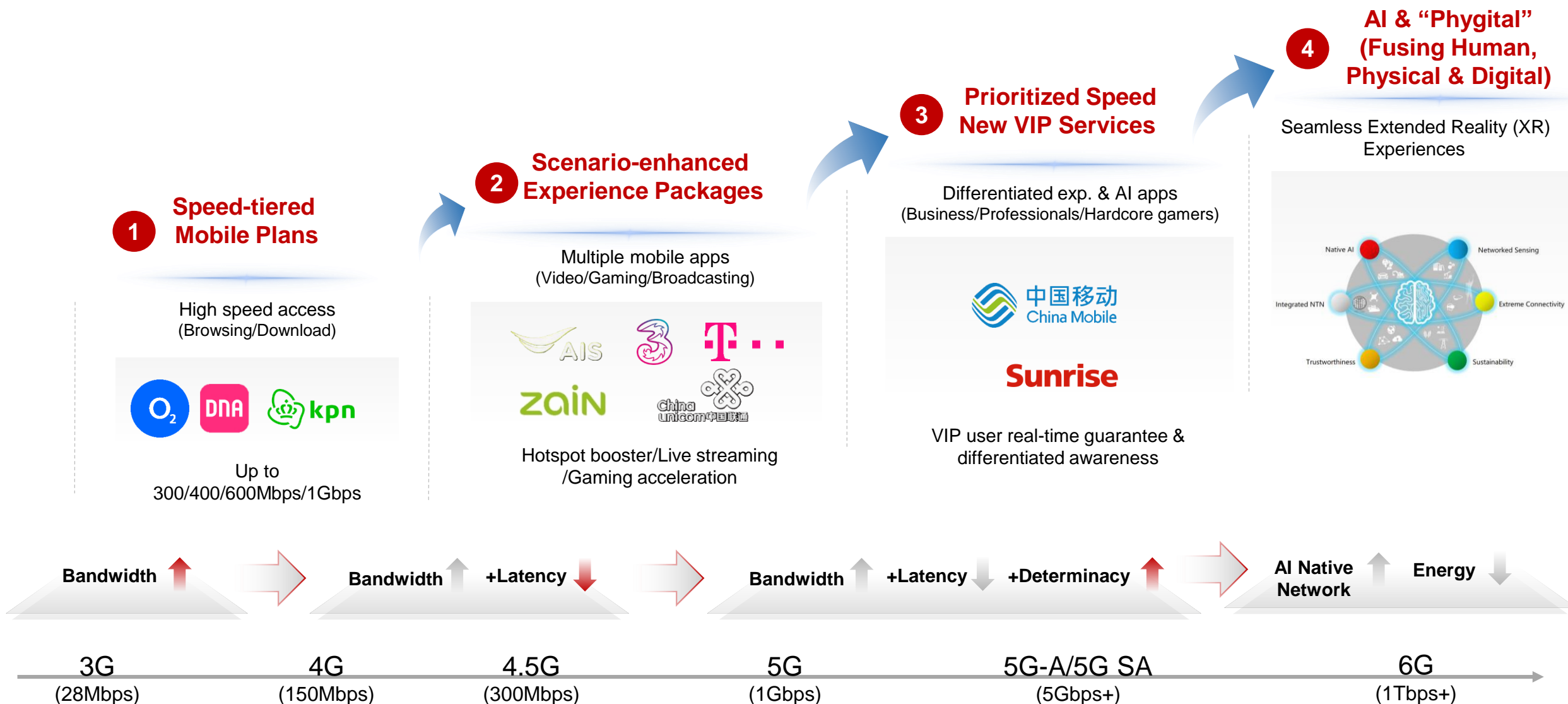
## Wave2 5G acceleration: 5G User Penetration (20%, 40%)

- |  |                                      |
|--|--------------------------------------|
| 1. Discontinuous 5G network construction, poor user exp. | 1. 5G City continuous coverage       |
| 2. Traffic growth slows down                             | 2. High-value → High-potential       |
|  | 3. 5G multi-dimensional monetization |

## Wave3 4G/5G coordination: 5G User Penetration < 20%

- |                                     |  |
|-------------------------------------|--|
| 1. Slow user migration              | 1. 4G/5G synergy, potential stimulation    |
| 2. High network load                | 2. 4G traffic suppression release          |
| 3. Long site deployment ROI         | 3. Accelerate new 5G spectrum provisioning |
| 4. Dispersed population, low income | 4. Developing new digital countryside      |

# Looking Ahead: Telcos Undergoing Transformation – New 5G-A / 6G Business Models Emerging





# Thank you.

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每个组织，构建万物互联的智能世界。

Bring digital to every person, home and  
organization for a fully connected,  
intelligent world.

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