



**LATIN AMERICA**  
BOGOTÁ • 31 OCT - 2 NOV 2017

GSMA Mobile 360 Series – Latin America brought together key stakeholders in the region to share the innovation taking place across the region through a mix of keynote presentations, panel discussions, workshops, in-depth case studies, GSMA Latin America Working Group meetings, and more. Prominent topics in the conference included future networks, IoT, and mobile’s impact on society; moreover, GSMA Intelligence presents their observations from Mobile 360 – Latin America:

### **Mobile broadband revolution in Latin America just beginning**

With Latin American consumers increasingly using smartphones, and increasingly 4G network-connected smartphones, cellular data usage is booming. Telefónica, for example, stated that data usage in its Latin American businesses has grown four-fold in the past two years and – with 4G adoption accelerating and 5G is on the horizon – it and other operators expect strong data growth to continue in the short- and medium-term.

This data growth, along with the economic turnaround (particularly in Brazil, by far the region’s largest market), among other factors, is fuelling service revenue growth for the first time in several years. This renaissance of operational and financial performance gave many operators a noticeably more optimistic tone and outlook than in recent years. Operators not only see an optimistic future for their consumer operations, but also expect IoT and data analysis to bring in even more data revenue.

Operators and entrepreneurs also recognise that the region is experiencing an upswing in innovation across the mobile and internet spaces. Operators are working to define a clear strategy to participate and fully benefit from this trend.

### **Operators preparing for 5G but nurturing 4G today**

In common with other regions, operators are looking ahead to the next generation of mobile services. However, there is a difference of opinion among operators about how quickly 5G will be a reality. Tigo Colombia (Millicom), for example, is preparing to trial 5G in the country before the end of the year, although it does believe commercial launches are much further ahead. Telecom Personal Argentina, among other operators less publicly, are fully focused on 4G on a commercial basis while they get to grips with the technical challenges of preparing for 5G in the medium, not short, term.

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### **The need for appropriate regulation and public policy support**

Another point emphasised both by operators as well as ecosystem players is the need for appropriate regulation and oversight as well as productive and supportive relationships with public policy makers. This was an especially salient point given the location of m360 Latam in Bogotá, as the two largest operators in Colombia recently paid large, unexpected and contested payments to the government.

For operators, they hope and expect governments to be preparing for 5G, including supportive regulation and sufficient spectrum allocation, so that the region does not lag as far behind other regions as it did during both 3G and 4G. They also would like governments to remove barriers, such as sector-specific taxation, which impedes further smartphone and mobile broadband adoption in the region.

In the ecosystem more broadly, the IoT space and mobile money are key areas which hold much promise to improve efficiency, productivity and safety across the region, however enabling regulation still too often lags the availability of technology.

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