

Arthur D Little

Arthur D. Little study on leading 5G countries

5G

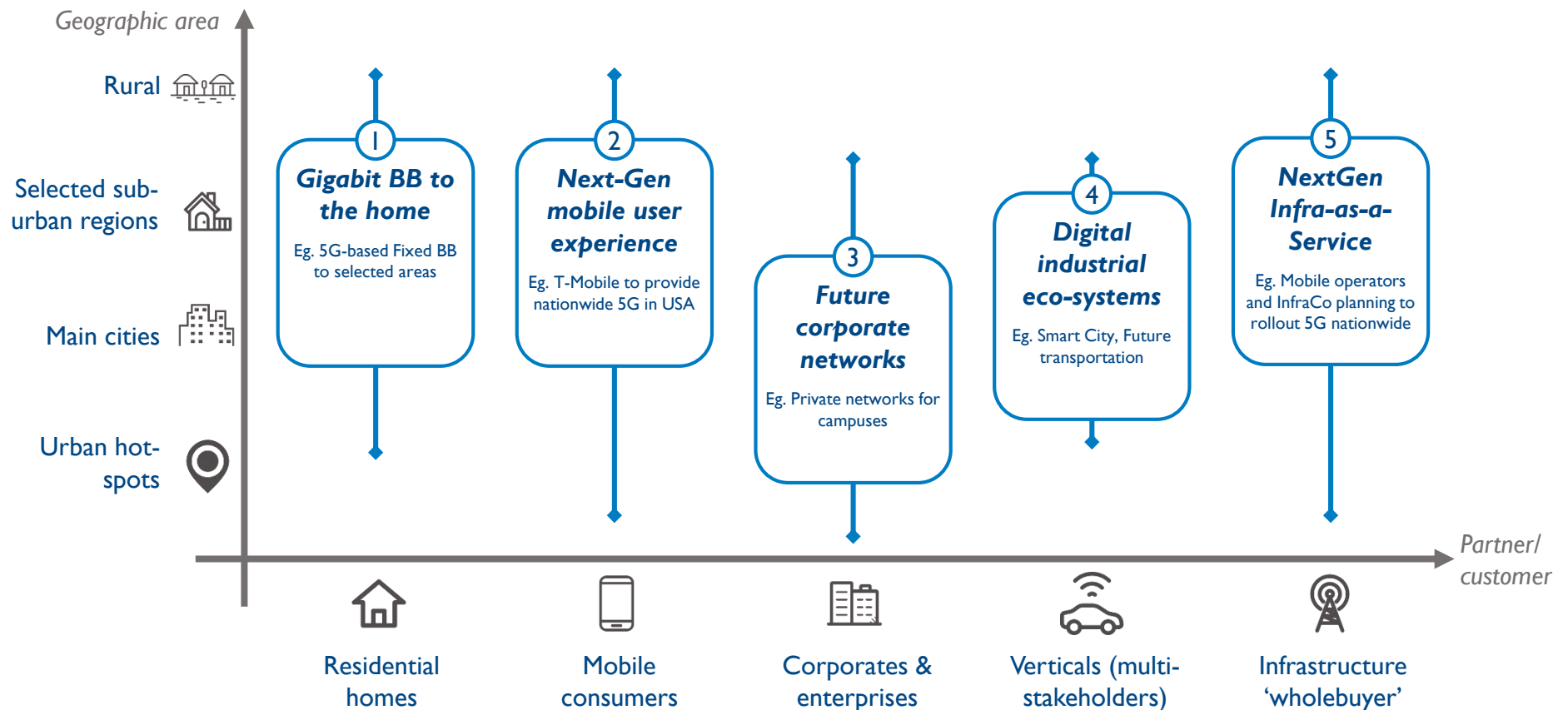
Teaser

2019



Arthur D. Little has anticipated five 5G deployment models 2 years ago

5G deployment models

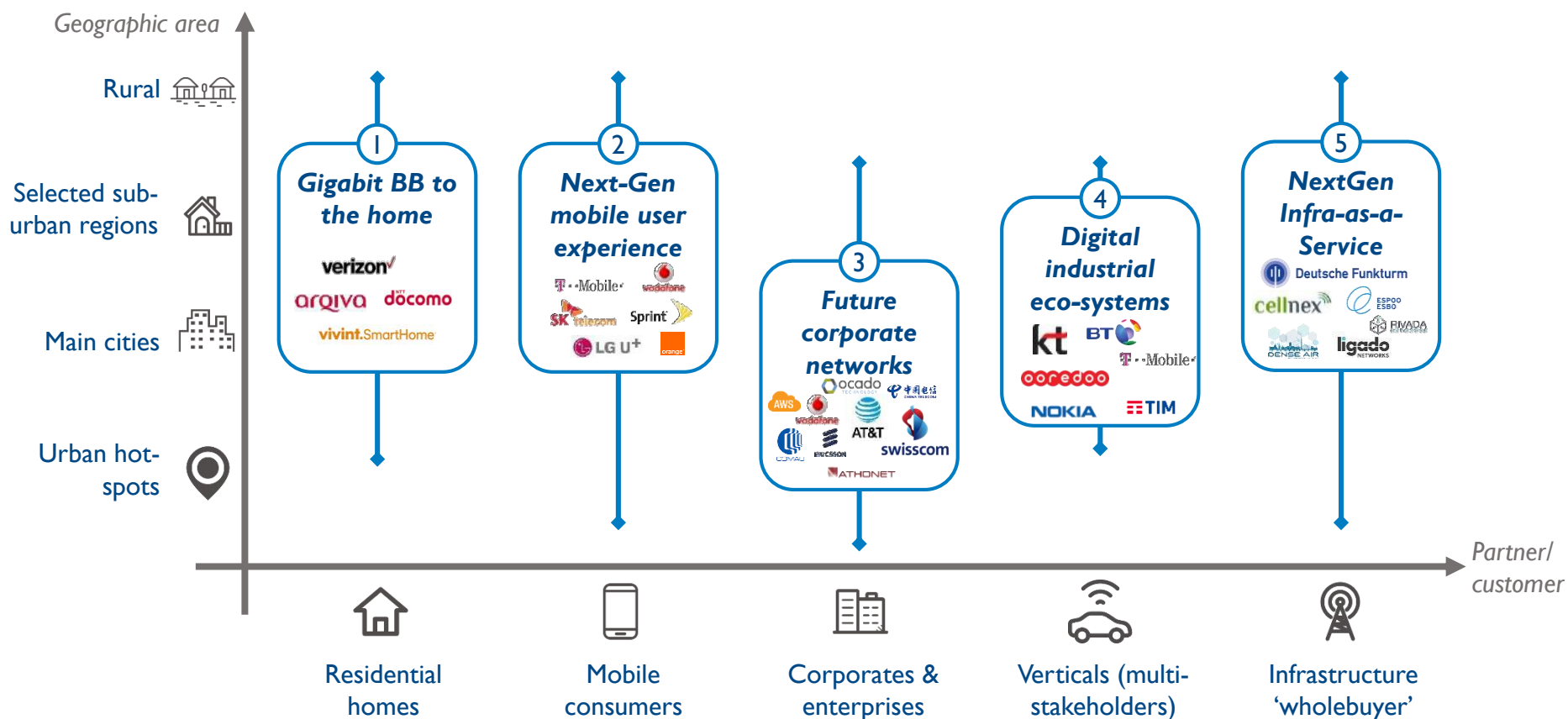


Source: Arthur D. Little, Communication of CEOs of respective operators, publicly available data

Operators have launched various pilots and will start commercialization soon in all five models, thus proving our hypothesis

5G deployment models

SELECTED CASE STUDIES



Source: Arthur D. Little, Communication of CEOs of respective operators, publicly available data

ADL developed a 5G leadership index which assesses >40 countries' technical infrastructure and their tendency for 5G commercialization

Infrastructure availability drivers



Availability of 5G spectrum



5G rollout commitments



NGA coverage



4G availability



Antenna density



Telco CAPEX investments

Commercialization tendency drivers

of players with spectrum



5G trial intensity & successes



Fiber household penetration



4G usage



Household consumption

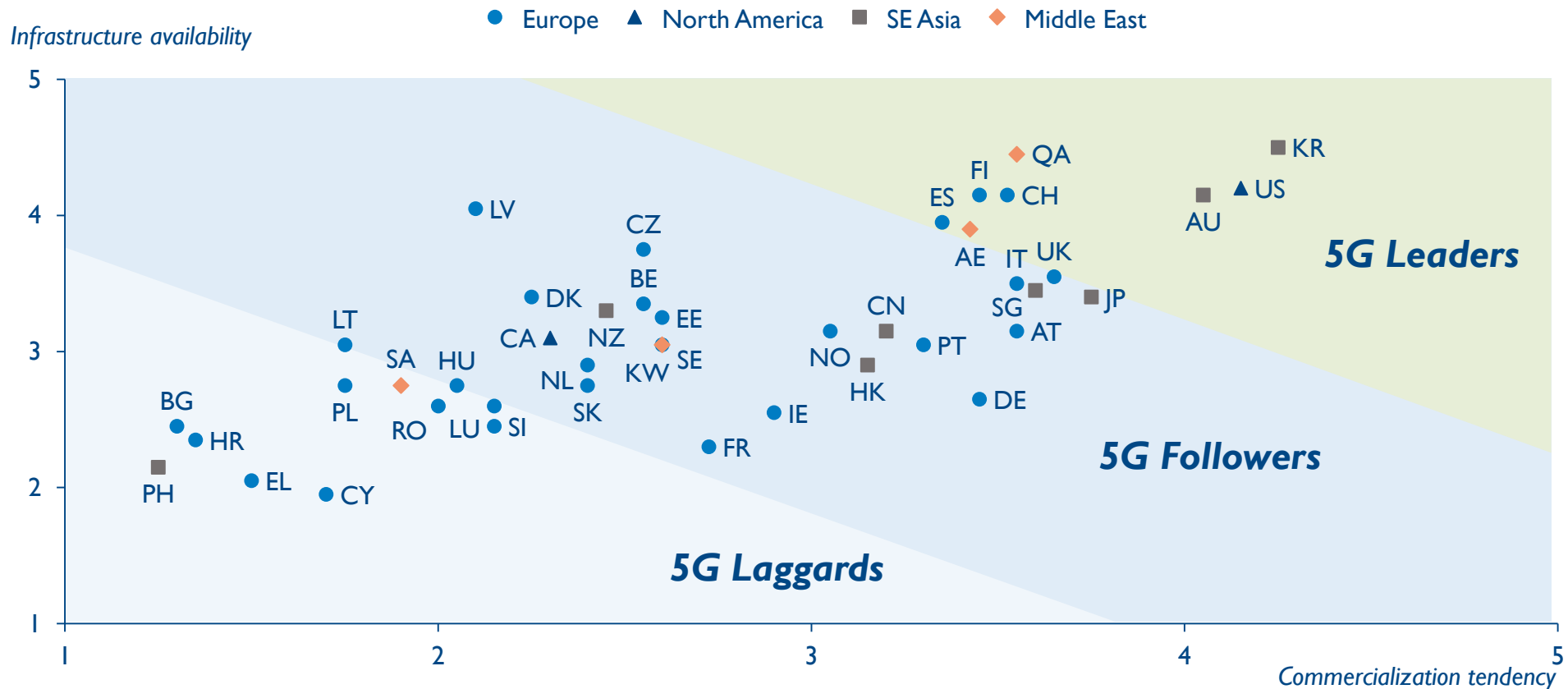


R&D spend as % of GDP



Leading countries have both the required technical infrastructure for 5G rollout and a strong tendency towards commercialization

Arthur D. Little 5G Leadership Index



Source: Arthur D. Little, Eurostat, World Economic Forum, The World Bank, Euromonitor, ITU, iDate, Opensignal, online research, expert interviews