The Digital Ecosystem: Challenges & Opportunities for Europe

Leonard J. Cali
Senior Vice President – Global Public Policy
AT&T Services, Inc.

15 October 2015
The Digital Ecosystem
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...

We shall be able to communicate with one another instantly, irrespective of distance...
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...

We shall be able to communicate with one another instantly, irrespective of distance...

and the instruments through which we shall be able to do this will be amazingly simple compared with our present telephone.
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...

We shall be able to communicate with one another instantly, irrespective of distance...

and the instruments through which we shall be able to do this will be amazingly simple compared with our present telephone.

Nikola Tesla, 1926
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...

We shall be able to communicate with one another instantly, irrespective of distance...

and the instruments through which we shall be able to do this will be amazingly simple compared with our present telephone.

Nikola Tesla, 1926

The Network Makes It Work
The Digital Ecosystem

When wireless is perfectly applied the whole earth will be converted into a huge brain...

We shall be able to communicate with one another instantly, irrespective of distance...

and the instruments through which we shall be able to do this will be amazingly simple compared with our present telephone.

Nikola Tesla, 1926

The Network Makes It Work

The Handset Is the Remote Control
Digital Ecosystem Growth

U.S. Wireless Connections

- 340K in 1985
- 100M in 2000
- 355M in 2014

Mobile Video in Exabytes

- 25EB in 2003
- 570EB globally by 2020

Mobility by the Numbers

- Wireless Penetration (in the U.S.)
  - 54% in 2003
  - 110% in 2014
- Annual Wireless Revenue (in the U.S.)
  - $88B in 2003
  - $188B in 2014
- Capital Investment (in the U.S.)
  - $145M in 2003
  - $32B in 2014

Source: AT&T “The Wireless Ecosystem” 2015

© 2015 AT&T Intellectual Property. All rights reserved. AT&T and the AT&T logo are trademarks of AT&T Intellectual Property. AT&T Proprietary (Internal Use Only). Not for use or disclosure outside the AT&T companies except under written agreement.
Industry Trends

- Tablets
- Cloud
- Smart Cities
- TV
- Fleet
- Video
- Smart Fitness & mHealth
- Farm & Agriculture
- Cargo
- Connected Vehicles
- Home Automation & Security
Industry Trends

• Video
Industry Trends

- Video
- Software Defined Networks
Industry Trends

- Video
- Software Defined Networks
- Industrial Internet
Industry Trends

- Video
- Software Defined Networks
- Industrial Internet
- 5G
• Openness/Platforms for Innovation
• Regulatory Modernization & Parity
  • Speed of Innovation
  • Dual Regulation
  • Market/Product Definition
  • Same Service/Same Rules
• Spectrum
  • Pipeline
  • Licensed/Unlicensed/Share
  • Permissionless Innovation/New Choices

• Trust
• Cybersecurity
  • Flexibility
  • Information Sharing
  • Liability Protections
• Privacy
  • Transparency
  • Customer Control
• Global SIM
  • Numbering
  • Taxation
  • Regulation