



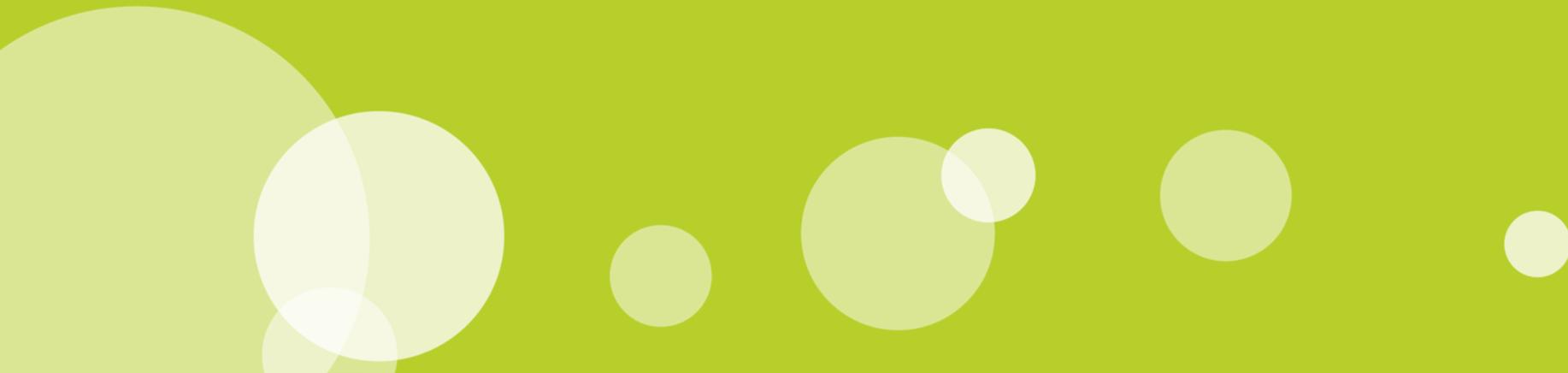
HB 3065 COLR Public Meetings

Oregon Public Utility Commission

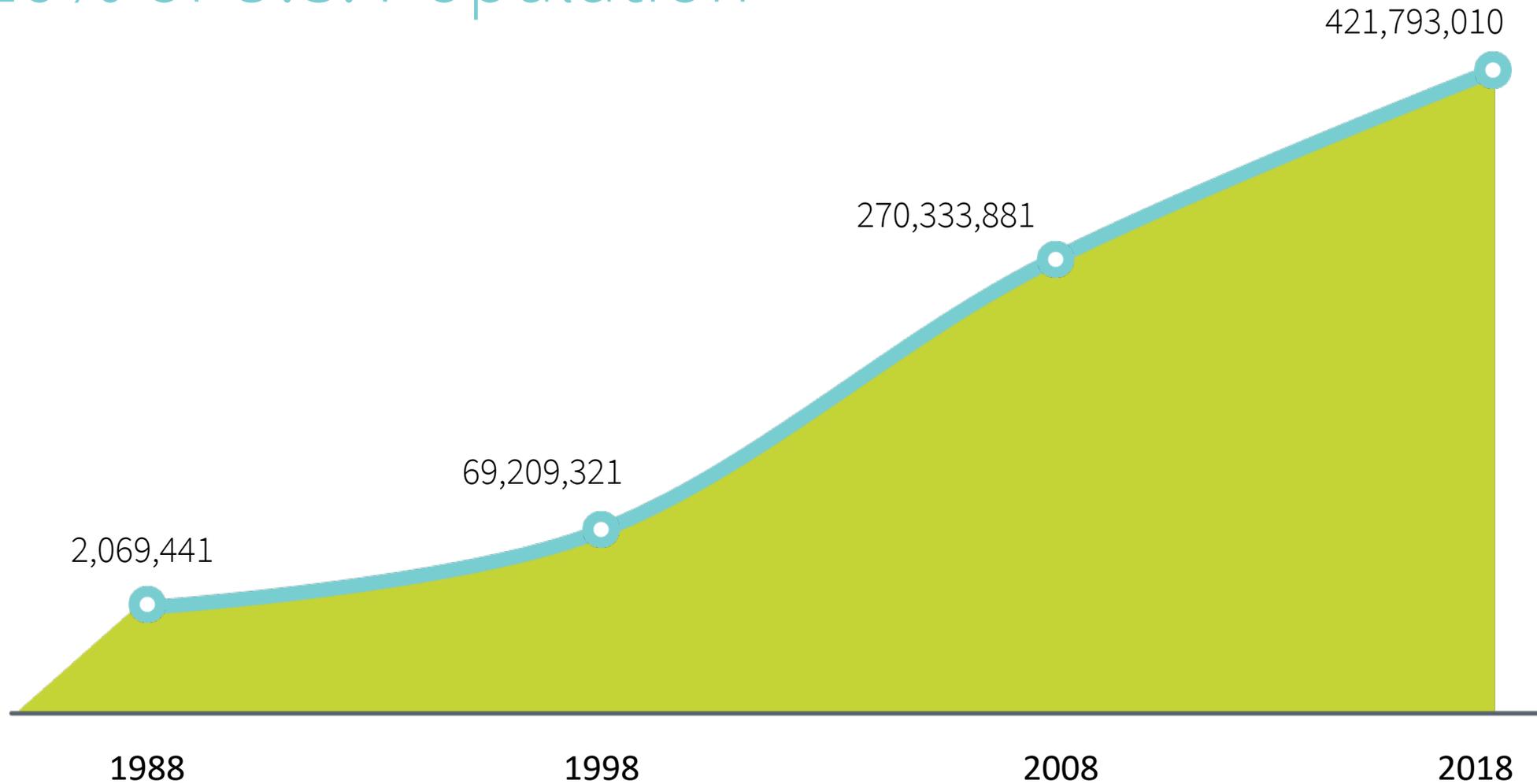
March 17, 2020



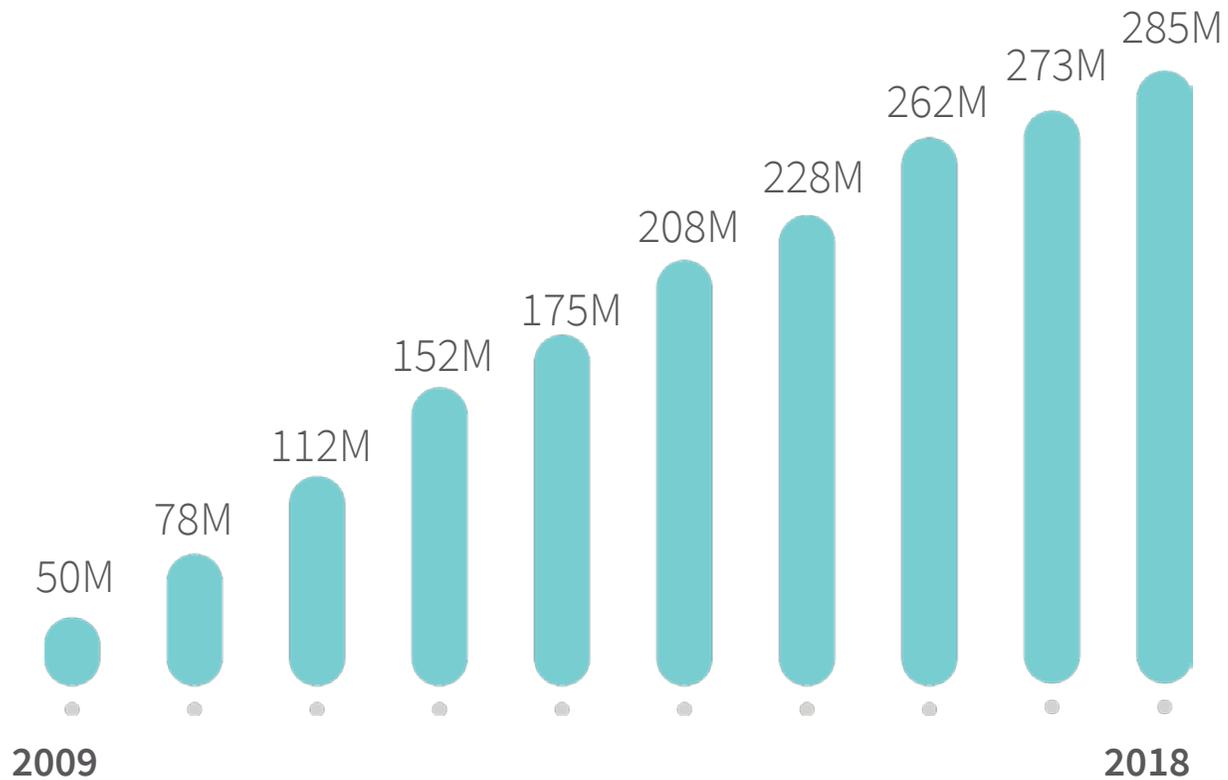
Wireless Trends



Estimated Wireless Subscriber Connections Equal 126% of U.S. Population



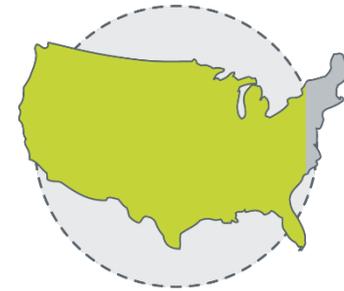
Americans Continue to Connect More Devices



Reported Smartphones Grew **5.7x** from 2009

284.7M

of those devices are smartphones...

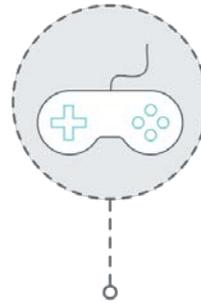
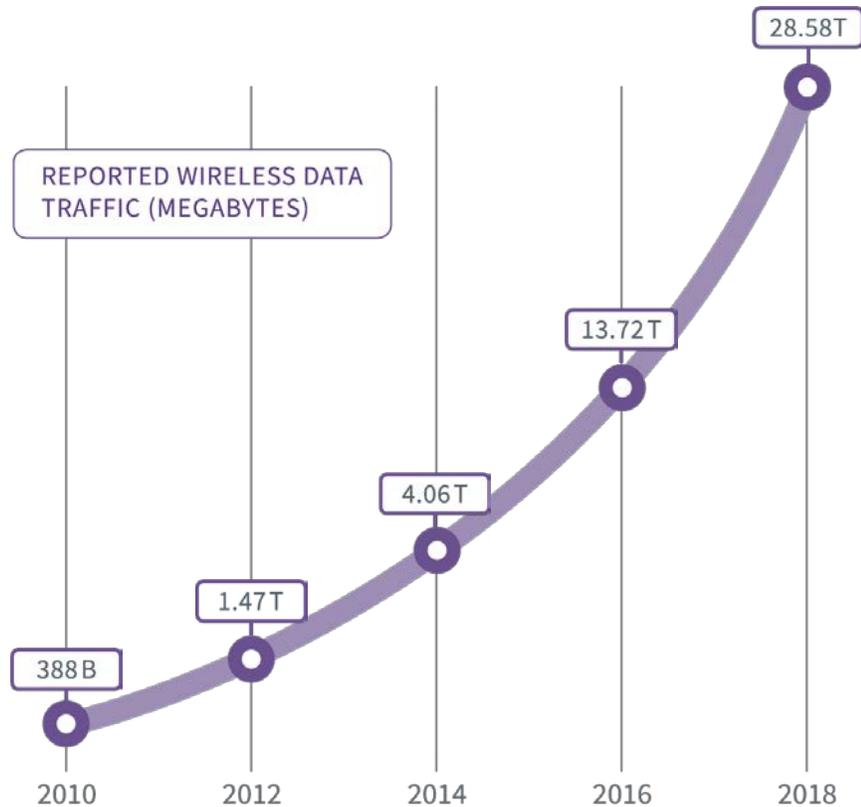


...which translates to 87% of the U.S. population having one.

And on average, smartphones generated **6.6 GB of data per month.**



Mobile Data Use Nearly Doubled in One Year



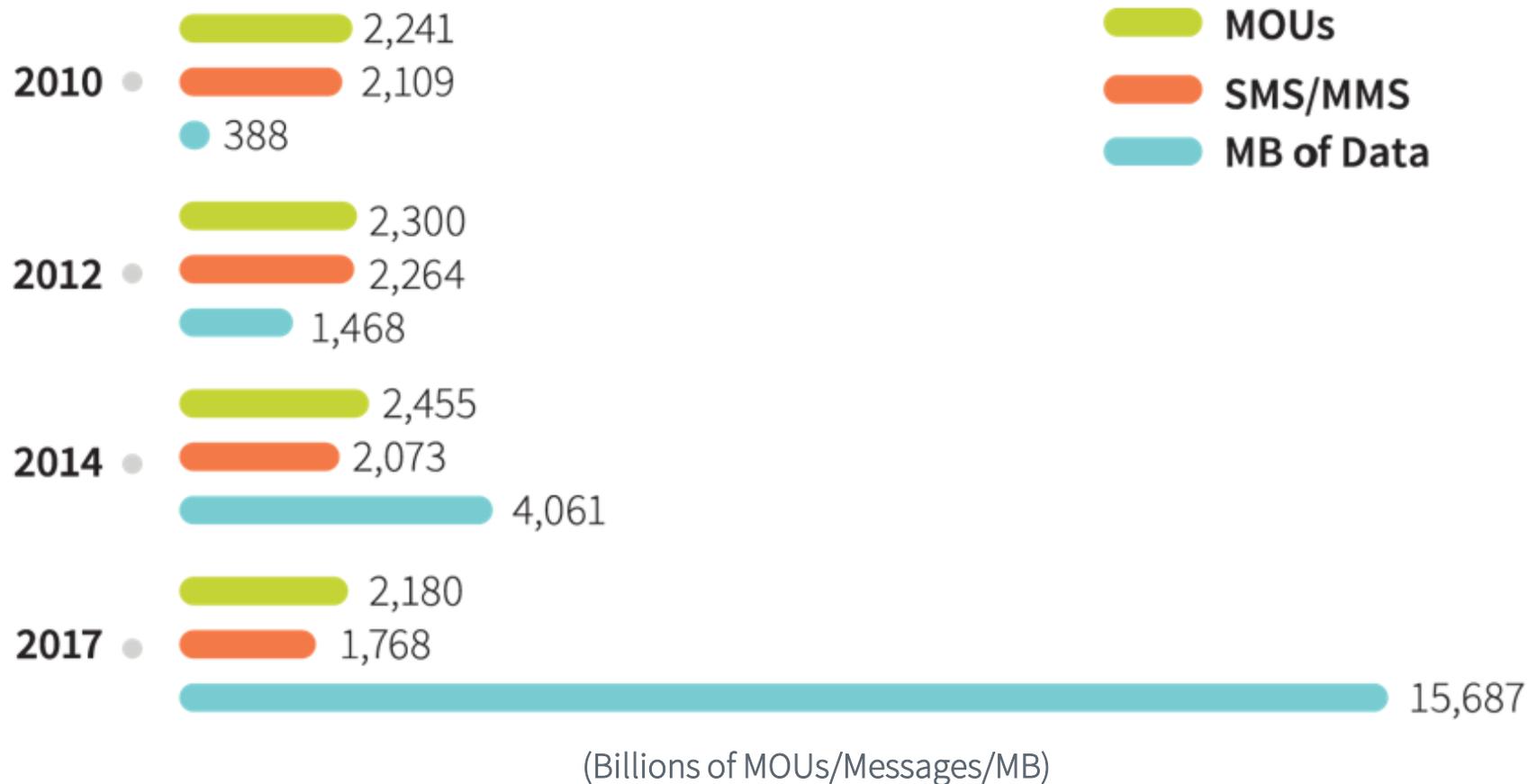
To put this in perspective, 28.58 trillion MBs of data is equivalent to 250 million people playing Fortnite for 1,906 hours.

 **82%**

growth in mobile data use from 2017 to 2018.



The Mix of Minutes, Messages and Megabytes of Wireless Traffic Changes – Data Dominates



Wireless Industry Investment Increased \$1.8 billion

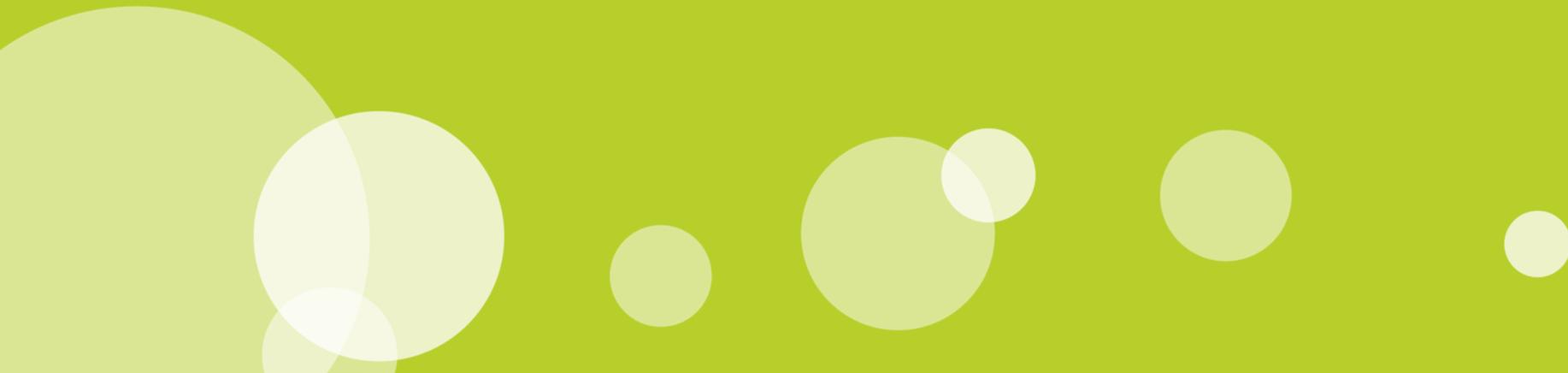


\$27.4B

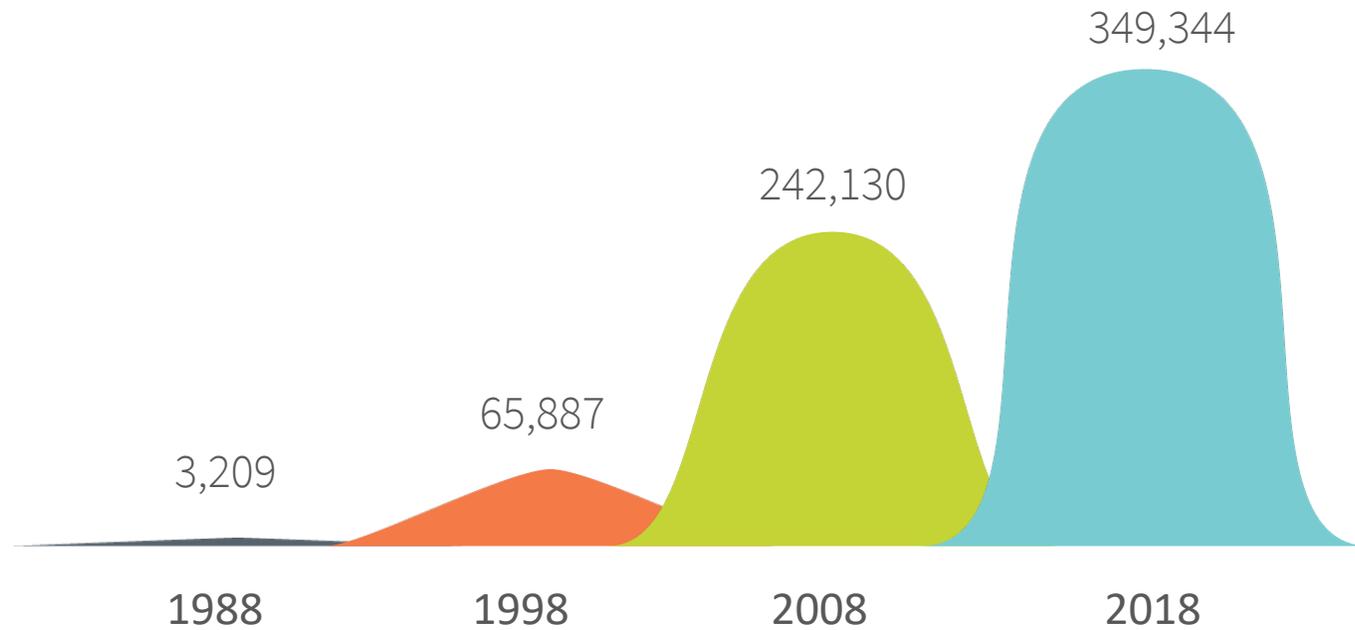
in wireless industry
capital investment
in 2018.

| Year | Cumulative CapEx (\$000s) |
|------|------------------------------|
| 2011 | \$335,331,967 |
| 2012 | \$365,426,326 |
| 2013 | \$398,567,671 |
| 2014 | \$430,642,374 |
| 2015 | \$462,605,007 |
| 2016 | \$488,996,535 |
| 2017 | \$514,625,256 |
| 2018 | \$542,033,353 |

Infrastructure



Cell Sites in Service



A Record **349,344** Cell Sites Were in Operation in 2018, Representing **44% Growth** Over the Last Decade

| Year | Cell Sites in Service |
|------|-----------------------|
| 2011 | 283,385 |
| 2012 | 301,779 |
| 2013 | 304,360 |
| 2014 | 298,055 |
| 2015 | 307,626 |
| 2016 | 308,334 |
| 2017 | 323,448 |
| 2018 | 349,344 |

Principles: Removing Barriers to Broadband Deployment

- Nondiscriminatory rates and pole access
- “Shot clocks” for applications
- Reasonable application fees
- Clear survey and make-ready timelines
- Self-help remedies for attachers
- Streamlining collocations
- “One-touch make-ready” where appropriate

Wireless Industry on COLR and USF

Wireless and COLR

- Wireless not COLR Anywhere
- States Cannot and Should not Impose COLR Obligations on Wireless
- Regulatory Paradigm Behind COLR is Entirely Absent for Wireless

Wireless and USF

- No USF Where There is an Unsubsidized Competitor
- High Cost Areas set in 1999 – Revisit Today
- Technology Neutral Programs
- Work in Concert With Federal Programs
- Fund USF Goals at Lowest Level Necessary to Achieve Goals

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