


Geopolitics

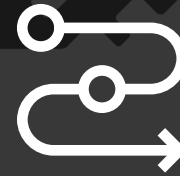


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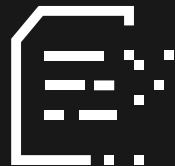
Geopolitical themes



Trusted vendors –
networks, equipment, apps



Supply chain – CHIPS,
Buy America



Digitalization – data
privacy, AI



Global alignment –
standards, alliances

Concerns over trusted vendors have escalated over the past decade between US and China



*"Are we ready to have these two companies, clearly tied to the Chinese government ... to have access to the most sensitive data we deal with every day?"
—Former Chairman Mike Rogers, 2012*



Following the 2012 House Intelligence report, the major nationwide US operators chose not to deploy Chinese vendors....

...however, many smaller rural carriers continued to implement some Chinese equipment



US regulators have implemented strong restrictions on Chinese vendors ☰

Defense Department ban from purchasing Huawei

Executive branch ban from purchasing Huawei

Added to 'Entity List' requiring US gov approval to buy American technology; executive order on information and telecom equipment posing security risk

2017

2018

2019

2020

Restrictions on foreign sales of semiconductors to Huawei and FCC bars federal funds from being used to purchase their equipment

2021

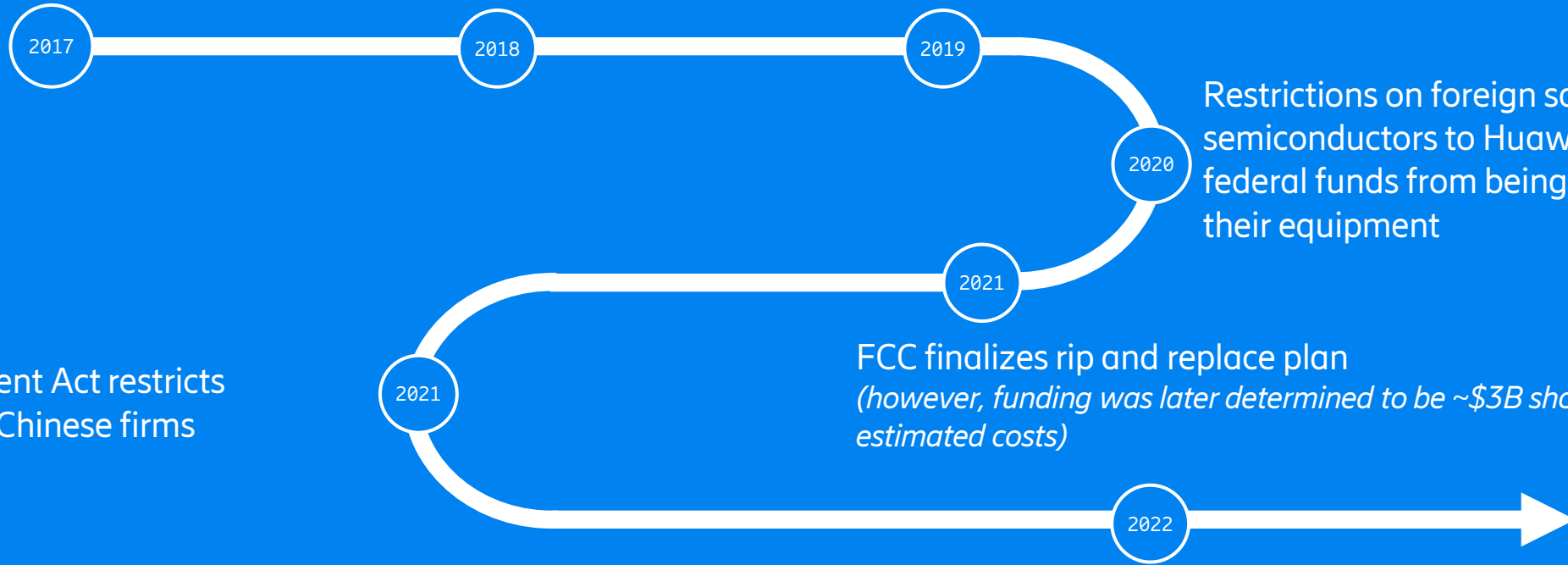
Secure Equipment Act restricts investments in Chinese firms

FCC finalizes rip and replace plan
(however, funding was later determined to be ~\$3B short of estimated costs)

2021

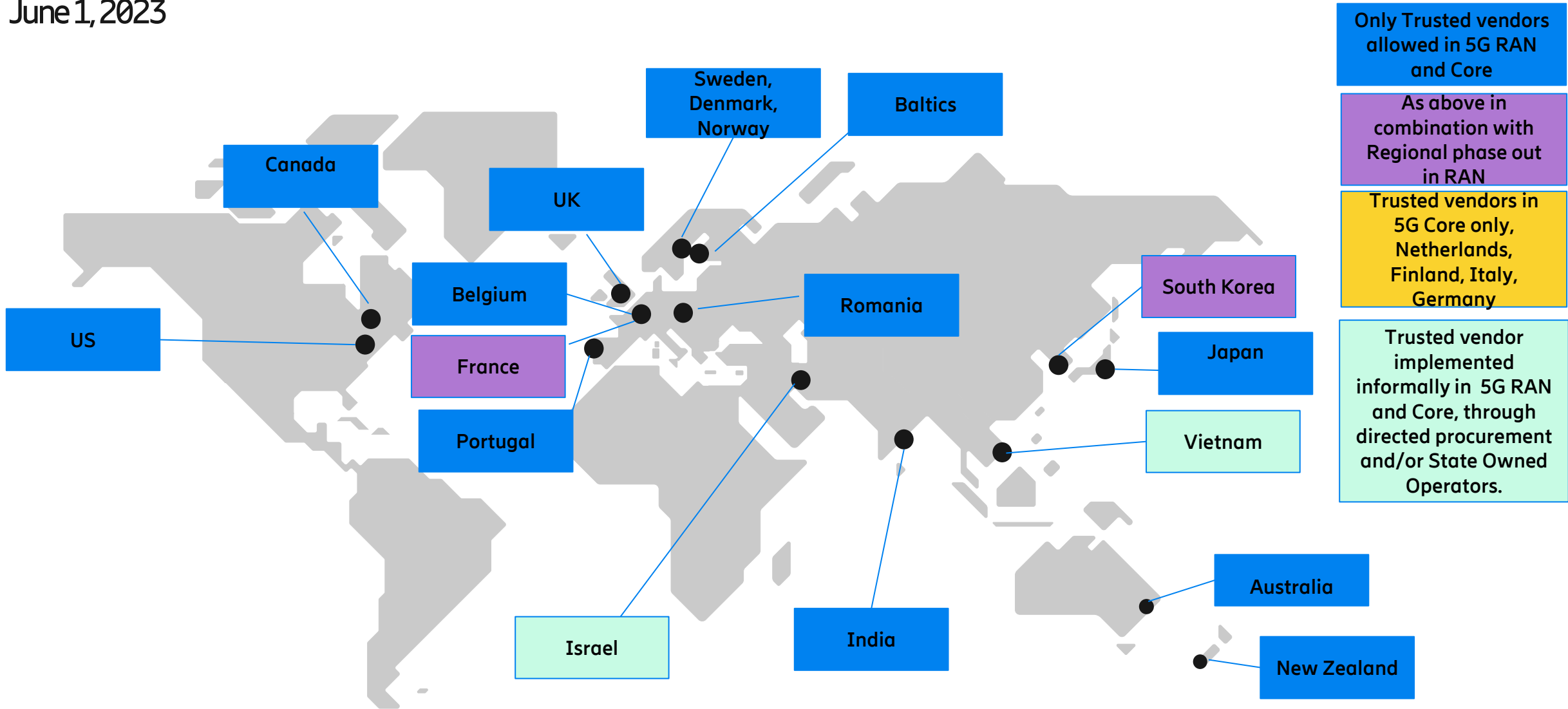
2022

Nov 2022: FCC ban of US sales and imports of Huawei and ZTE



5G Trusted Vendor conditions around the world

June 1, 2023



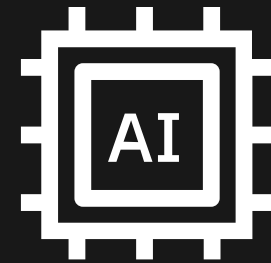
Ericsson has been designated as a trusted supplier in all covered instances

U.S. government concerns are not limited to vendors, Tik Tok has been in the spotlight over data privacy



- Members of US Congress continue to introduce legislation and call for restrictions
- TikTok is restricted on government devices
- 1st US state restricts residents from downloading
- 30+ colleges and universities restrict access over their WiFi
- Other countries such as Australia, India, EU, Canada have Tik Tok restrictions on government devices

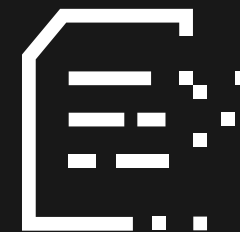
While many countries are releasing their own technology principles, global alliances and standards work to find common ground and path forward



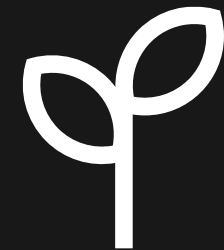
AI



Connectivity 5G, 6G



Digitalization



Sustainability

Following the 4th Joint US EU TTC last week, plans to align policy roadmaps on AI and 6G released



TTC 6G Vision

1. 6G technologies should be in line with common principles and values such as sustainability, privacy, accessibility, openness, and inclusiveness. 6G wireless communication systems should be trustworthy, resilient, and affordable and contribute to closing digital divides in both developed and developing nations.
2. Similarly, 6G standards should enable enhanced connectivity including, but not limited to Direct-to-Device (D2D) satellite connectivity in an open and interoperable environment. This would help ensure worldwide broadband connectivity, including in rural and low-income areas.
3. 6G technologies must also be an enabler for sustainability, considering environmental, social, and economic perspectives.
4. 6G standards should be developed with security-by-design, be private-sector led, and built on consensus-based principles to enable an ecosystem of resilient, open, interoperable, and software-based 6G solutions. 6G standards should be set in a transparent manner by standard setting organizations in conformity with relevant WTO principles on technical barriers to trade.

US-EU Infrastructure cooperation

1. In April 2023 and in TTC (May), US and EU agreed on cooperation for identifying and supporting projects in sectors of common interest
2. The Participants intend to focus in particular on projects with the following characteristics:
 - Projects which aim to advance secure and resilient connectivity and ICT supply chains by involving the use of trusted/non-high-risk suppliers;
 - Projects which close digital divides by providing future-proof digital services to unserved or under-served communities in emerging and developing economies. Such projects would support investment in advanced, resilient and secure communications network infrastructures, built using trustworthy suppliers,



Supply chain challenges from both economic and national security perspective leading to domestic investment and policies

