

# Mobile Networks Forecasts: Future Mobile Traffic, Base Stations & Revenues

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2012

INCLUDES GROUND  
BREAKING RESEARCH ON  
THE MOBILE NETWORKS  
TRAFFIC MARKET

**NEW:**  
Interactive  
Forecasts  
companion  
product  
(SEE PAGE 2)

## The most detailed mobile networks forecasts to 2012 from the most respected source

“*The mobile network traffic forecasts, which detail traffic expected from all key mobile applications ranging from circuit-switched voice and SMS to music downloads and video streaming—serve as the foundation for the mobile base station forecasts provided in this report. This is a truly unique approach that goes well beyond other research offerings by tackling the immensely complex area of mobile network traffic, and using the resulting traffic forecasts to drive and validate mobile base station forecasts.*” Mike Roberts, Principal Analyst

**Mobile Networks Forecasts: Future Mobile Traffic, Base Stations & Revenues** details how the rise of mobile Internet applications running on mobile broadband networks is sparking a traffic boom that will transform mobile networks, vendors and operators.



**Packed with  
exclusive data  
and forecasts**

### KEY COVERAGE IN THIS REPORT:

- ✓ **Unique and comprehensive mobile network traffic forecasts** detailing the applications, technologies and regions driving current and future mobile traffic
- ✓ **Realistic mobile base station forecasts** quantifying the infrastructure opportunity of the transition from voice to the mobile broadband Internet, including details on base station installed base, unit sales and revenues by technology and region
- ✓ **Extensive scenario analysis** including full traffic and base station forecasts for two alternative scenarios with significantly different adoption rates for key mobile applications such as circuit-switched voice, Internet browsing, music downloads and video streaming
- ✓ **Full set of supporting forecasts** for mobile subscribers by technology and region

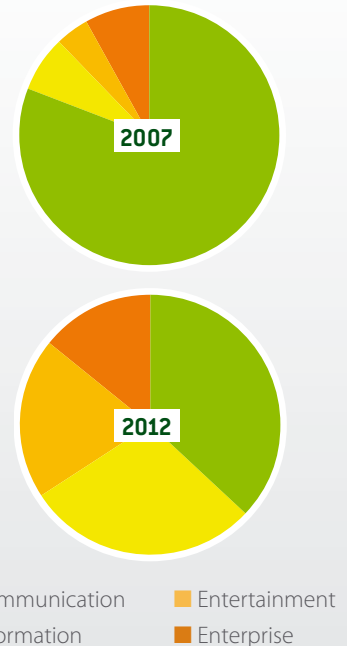
[See inside for more details on this report](#)

# Mobile Networks Forecasts: Future Mobile Traffic, Base Stations

This is a truly unique approach that goes well beyond other research offerings by tackling the immensely complex area of mobile network traffic, and using the resulting traffic forecasts to drive and validate mobile base station forecasts. **The result is a unique and independent package of forecasts and analysis that eliminates industry hype and provides a wealth of fresh insight on the true demand drivers and timelines for the evolution of mobile networks from GSM, WCDMA and CDMA to WiMAX, LTE, UMB, TD-SCDMA and TD-CDMA.**

- ✓ **Make** fully informed strategic decisions and support your business planning with a truly unique and comprehensive package of forecasts and analysis covering both mobile network traffic and mobile base stations with detailed segmentation by application, air interface / technology and region
- ✓ **Assess** how the rise of the mobile broadband Internet will impact mobile networks, vendors and operators with exclusive industry-validated traffic forecasts detailing the applications, air interfaces and regions driving the mobile traffic boom
- ✓ **Identify** the commercial opportunities in the global mobile networks & infrastructure market with comprehensive base station forecasts to 2012 including installed base, unit sales, ASPs & revenues for all key air interfaces and regions
- ✓ **Gain** a detailed understanding of how the mobile broadband Internet traffic boom will transform mobile networks, vendors and operators and drive demand for next-generation systems, with expert strategic analysis and unique comparative forecasts detailing the key demand drivers, timelines and market potential for the transition from GSM, WCDMA and CDMA to WiMAX, LTE, UMB, TD-SCDMA & TD-CDMA
- ✓ **Develop** an in-depth global understanding of which technologies and companies will win and lose in the global mobile networks & infrastructure market with comprehensive forecasts detailing industry trends, growth drivers and future prospects by application category, technology, region and market segment.

## GLOBAL MOBILE NETWORK TRAFFIC BY APPLICATION CATEGORY, 2007 / 12



Source: Informa Telecoms & Media

## EXCLUSIVE: Interactive Forecasts - the Mobile Networks Forecasts report companion

In one easy-to-use Excel tool, Interactive Forecasts will give you a more comprehensive set of traffic and base station forecasts than in the report – in a quick and easy spreadsheet format.

### KEY FEATURES AT A GLANCE:

- View a more detailed set of forecasts than are in the report, by:
  - Scenario
  - Technology
  - Application
  - Region
  - Geotype (Urban, Suburban, Rural)
  - Uplink & downlink
- Compare and analyse different markets at the touch of a button
- Get a clear and informative view of trends through interactive charts and graphs
- Find the information that you need quickly and easily using menu buttons and drop down lists

### The following forecasts are included:

- Regional traffic forecasts by:
- Application basket (Communication, Information, Entertainment & Enterprise)
  - Air Interface
  - Geotype
  - Uplink and downlink

Regional average MB per subscriber forecasts by air interface

- Regional base station forecasts by
- Installed base
  - Shipments
  - Revenue

- Global traffic forecasts by
- Application
  - Access technology

PLUS each of these forecasts can be viewed under 3 different scenarios.

**"Your forecasts are excellent - I'm amazed at the detail that you have!"**

A. Sumits, Cisco



### PRICING:

Interactive Forecasts\* + Single User PDF of MNF report: £7490 / \$14970 / €11040

\*This product cannot be sold separately.

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Simply complete the form overleaf. For further information, contact our customer services team on +44 (0) 20 7017 5537

## KEY FORECASTS IN THIS REPORT 2007 - 2012\*

### Chapter 1: Executive Summary

- Introduction
- Data traffic outpacing revenues
- Operators restrain investment
- Vendors under fire
- Data-driven transformation

### Chapter 2: Scope & Methodology

- Report Scope
- Forecast methodology
  - Subscriber forecasts
  - Mobile network traffic forecasts
  - Mobile base station forecasts
  - Chapter 3: Global subscriber forecasts
- Mobile subscribers & penetration by region
- Mobile subscribers by air interface / technology
- Mobile subscribers by business / consumer

### Chapter 4: Subscriber forecasts by air interface

- CDMA air interface subscribers by region
  - Global top 20 CDMA operators by subscriptions
- GSM air interface subscribers by region
  - Global top 20 GSM operators by subscriptions
- WCDMA air interface subscriber by region
  - Global top 20 WCDMA operators by subscriptions
- TD-SCDMA subscribers by region
- TD-CDMA subscribers by region
- WiMAX subscribers by region
- UMB subscribers by region
- LTE subscribers by region
- Other air interface subscribers by region

### Chapter 5: Subscriber forecasts by region

- North America subscribers by air interface / technology
- Latin America subscribers by air interface / technology
- Asia Pacific subscribers by air interface / technology
- Europe subscribers by air interface / technology
- Africa/Middle East subscribers by air interface / technology

### Chapter 6: Global mobile network traffic forecasts

- Traffic by application & application category, Petabytes (PB)
- Traffic by air interface / technology, PB
- Traffic by region, PB
- Traffic by geotype – urban, suburban & rural, PB
- Traffic by downlink / uplink, PB
- Average subscriber traffic per month, MB

### Chapter 7: Mobile traffic forecasts by technology

- Average monthly subscriber traffic by air interface, MB

- CDMA air interface traffic by region, Petabytes (PB)
- CDMA air interface average monthly subscriber traffic by region, MB
- GSM air interface traffic by region, PB
- GSM air interface average monthly subscriber traffic by region, MB
- WCDMA air interface traffic by region, PB
- WCDMA air interface average monthly subscriber traffic by region, MB
- TD-CDMA traffic by region, PB
- TD-SCDMA traffic by region, PB
- WiMAX traffic by region, PB
- UMB traffic by region, PB
- LTE traffic by region, PB
- Other air interface traffic by region, PB

### Chapter 8: Mobile traffic forecasts by region

- North America traffic by air interface, Petabytes (PB)
- North America mobile traffic by application category, PB
- Latin America mobile traffic by air interface, PB
- Latin America mobile traffic by application category, PB
- Asia Pacific mobile traffic by air interface, PB
- Asia Pacific mobile traffic by application category, PB
- Europe mobile traffic by air interface, PB
- Europe mobile traffic by application category, PB
- Africa/Middle East mobile traffic by air interface, PB
- Africa/Middle East mobile traffic by application category, PB

### Chapter 9: Global mobile base station forecasts

- Base station (BTS) installed base & unit sales by region
- BTS global ASPs & revenues by region
- BTS installed base & unit sales by air interface
- BTS ASPs & revenues by air interface

### Chapter 10: Base station forecasts by air interface

- CDMA base station (BTS) installed base, unit sales & revenues by region
- GSM BTS installed base, unit sales & revenues by region
- WCDMA BTS installed base, unit sales & revenues by region
- TD-CDMA BTS installed base, unit sales & revenues by region
- TD-SCDMA BTS installed base, unit sales & revenues by region
- WiMAX BTS installed base, unit sales & revenues by region
- UMB BTS installed base, unit sales & revenues by region
- LTE BTS installed base, unit sales & revenues by region

- Other BTS installed base, unit sales & revenues by region

### Chapter 11: Base station forecasts by region

- North America base station (BTS) installed base, unit sales & revenues by air interface
- Latin America BTS installed base, unit sales & revenues by air interface
- Asia Pacific BTS installed base, unit sales & revenues by air interface
- Europe BTS installed base, unit sales & revenues by air interface
- Africa / Middle East BTS installed base, unit sales & revenues by air interface

### Chapter 12: Communications Scenario global forecasts

- Communications Scenario (CS) forecasts assumptions & main results
- Communication Scenario global mobile traffic
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- CS traffic by air interface / technology, PB
- CS traffic by region, PB
- CS traffic by genotype – urban, suburban & rural, PB
- CS traffic by downlink / uplink, PB
- CS average subscriber traffic per month, MB
- CS base station (BTS) installed base & unit sales by region
- CS global BTS ASPs & revenues by region
- CS BTS installed base & units sales by air interface
- CS global BTS ASPs & revenues by air interface

### Chapter 13: Advanced Data Scenario global forecasts

- Advanced Data Scenario (ADS) traffic by application & application category, Petabytes (PB)
- ADS traffic by air interface / technology, PB
- ADS traffic by region, PB
- ADS traffic by geotype – urban, suburban & rural, PB
- ADS traffic by downlink / uplink, PB
- ADS average subscriber traffic per month, MB
- ADS base station (BTS) installed base & unit sales by region
- ADS global BTS ASPs & revenues by region
- ADS BTS installed base & unit sales by air interface
- ADS global BTS ASPs & revenues by air interface

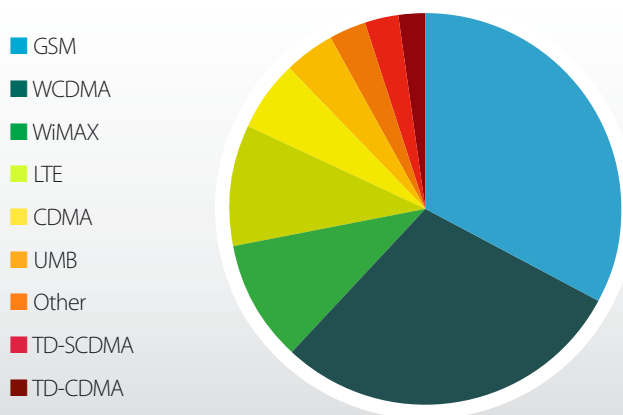
### Chapter 14: Conclusions

- Subscriber forecasts conclusions
- Mobile network traffic forecasts conclusions
- Base station forecasts conclusions
- Scenarios forecasts conclusions

\*Contents correct at time of printing

This report is unique in providing detailed mobile network traffic forecasts, which are built up from comprehensive forecasts for mobile subscribers and applications. The mobile network traffic forecasts, which detail traffic expected from all key mobile applications ranging from circuit-switched voice and SMS to music downloads and video streaming—serve as the foundation for the mobile base station forecasts provided in the report.

### GLOBAL BASE STATION UNIT SALES, 2012



Source: Informa Telecoms & Media

### TOP 10 APPLICATIONS BY MOBILE NETWORK TRAFFIC, 2012

- 1 Voice, circuit-switched
- 2 Browsing
- 3 Video streaming
- 4 Mobile office & workforce
- 5 Business email
- 6 Music streaming
- 7 Mobile TV streaming
- 8 Video downloads
- 9 VoIP
- 10 Consumer email

Source: Informa Telecoms & Media

## WHO SHOULD READ THIS REPORT?

#### Mobile Operators:

Understand the details of how flat-rate mobile broadband Internet services are breaking the link between network traffic (costs) and revenues, and the extent to which this key trend will play out differently by air interface, application and region

#### Infrastructure Vendors:

Use a unique new set of integrated forecasts on both mobile application traffic and base stations to refine your product roadmaps using industry-validated data on the applications and scenarios driving future network upgrades and expansions

#### Device Suppliers:

Use detailed forecasts for mobile traffic by application to gauge requirements for future mobile devices by air interface and region, and use comprehensive base station forecasts to understand the timelines and commercial opportunities for current and next-generation mobile systems

#### Software, Application and Content Providers:

Gain an in-depth understanding of the applications, application categories and air interfaces that will win and lose as mobile networks transition from voice to a more diverse range of mobile broadband Internet services, and assess the impact this will have on your strategies, products and services

#### Consultants, Analysts, Financial and Government Organisations:

Develop a thorough understanding of how the mobile traffic boom will transform the mobile industry and base future investments and recommendations on unbiased, unique forecasts and analysis.

### This report answers business-critical strategic questions:

- ✓ How will the rise of the mobile broadband Internet impact mobile technologies, networks, vendors and operators?
- ✓ How fast will mobile traffic transition from voice to data, which applications will drive the change, and how will this impact mobile networks, vendors, and operators?
- ✓ What is the average traffic per mobile subscriber today by air interface, and how fast will it increase?
- ✓ How will the transition to the mobile broadband Internet impact mobile base station installed base, unit sales and revenues?
- ✓ When will the boom in mobile data traffic force operators to deploy new network technologies such as HSPA+, LTE and WiMAX?

Informa Telecoms & Media is leading provider of market intelligence to the global telecoms and entertainment industries. Our clients receive business-critical strategic information, advice and forecasting on all aspects of converging mobile, entertainment and fixed telecoms market.

## Networks Intelligence Centre:

### Intelligence for network investment, implementation, and optimisation issues

The Networks Intelligence Centre focuses on networks, infrastructure and related technology developments in the mobile and convergent telecoms value chains. The main emphasis is on access networks and technologies supporting advance applications and services as well as network outsourcing the managed services.

For a detailed breakdown of the content in this Intelligence Centre visit [www.intelligencecentre.net/networks](http://www.intelligencecentre.net/networks)



## Broadband & Internet Intelligence Centre

### Covering fixed broadband and Internet media and communications services strategies

The fixed telecoms market is undergoing the most dramatic change in its history as the market incumbents begin to replace old copper PSTN infrastructure with all-IP fibre networks. How operators will make a return on these multibillion dollar investments remains uncertain, as the move will bring them into competition with powerful Internet and media firms with their own take on convergence.

For a detailed breakdown of the content in this Intelligence Centre visit [www.intelligencecentre.net/broadband](http://www.intelligencecentre.net/broadband)



## WiMAX strategic report

Your definitive guide to the technology trends, strategic issues and future of WiMAX across telecom markets worldwide.

This business-critical strategic report explores the future role of WiMAX in the increasingly complex fixed, mobile and convergent markets, including detailed infrastructure, device and subscriber and service forecasts for the next five years.

For more information visit [www.informatm.com/wimaxreport](http://www.informatm.com/wimaxreport)



## Mobile Broadband Devices: Opportunities for mobile handsets, MIDs, UMPCs and laptops

This new report addresses business critical questions including:

- How will the devices offering these and other high speed wireless technologies compete in the marketplace?
- What applications and services will these devices have to offer in order to convince subscribers to upgrade to them?
- What will be the device hardware and software roadmaps?
- Which key technologies and enablers will be at the forefront of MBD evolution?

For more information visit [www.informatm.com/mbd](http://www.informatm.com/mbd)



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