

Worldwide Market Analysis, Strategic Outlook
& Forecasts to 2013

Future Mobile Broadband:

**HSPA & EV-DO
to LTE Networks,
Devices & Services**
3rd edition

Future
Mobile
Broadband

New detailed analysis on
LTE timelines and rollout
strategies, and new **LTE
forecasts** for subscribers,
devices & data revenues

Future Mobile Broadband: HSPA and EV-DO to LTE Networks, Devices & Services analyses and quantifies the mobile broadband market opportunity for 2008 through 2013. The report provides a uniquely comprehensive analysis of key current and future mobile broadband systems including HSDPA, HSUPA, HSPA+, LTE, EV-DO, EV-DO Rev. A/B, TD-SCDMA and WiMAX.

NEW IN THIS EDITION:

- ✓ **Expert strategic analysis and fully segmented forecasts** for the mobile broadband market worldwide to enable you to make fully informed strategic decisions and support your business planning
- ✓ **Detailed new LTE forecasts** for subscribers, devices and data revenues through 2013 to allow you to fully understand how the LTE market will develop
- ✓ **Extensive new USB modem, datacard, notebook & netbook forecasts** providing unit sales figures through 2013 to detail the importance of each segment by region
- ✓ **Exclusive new operator service revenue forecasts and expert analysis of evolving business models** for the converging mobile, broadband and Internet markets, allowing you to identify the key commercial opportunities in the mobile broadband market
- ✓ **Comprehensive subscriber and device unit sales forecasts for HSDPA, HSUPA, HSPA+, LTE, EV-DO, EV-DO Rev. A/B, TD-SCDMA and WiMAX** to help you identify the winning and losing mobile broadband systems
- ✓ **In-depth operator and vendor case studies** highlighting current market successes and failures, which allow you to refine your business strategies by gaining a full understanding of the threats and opportunities of mobile broadband.

See inside for more new coverage in this edition

Future Mobile Broadband: HSPA & EV-DO to LTE Networks, Devices & Services

3rd edition

“ The runaway success of USB modems and the iPhone 3G has helped to make mobile broadband one of the top strategic and commercial opportunities in the converging mobile, broadband and Internet markets. We have fully revised our analysis and forecasts in light of the economic downturn and it is clear that some segments will be hit – but the bottom line is that mobile broadband will remain a key growth driver for the mobile market through 2013. In fact we’re forecasting more than 1.4 billion mobile broadband subscribers worldwide by 2013, representing close to one-third of total mobile subscribers. ”

Mike Roberts, Principal Analyst, Informa Telecoms & Media

Future Mobile Broadband: HSPA and EV-DO to LTE Networks, Devices & Services is unique in providing comprehensive global forecasts for mobile broadband subscribers, devices and service revenues. The report also provides exclusive new LTE forecasts covering subscribers, devices and data service revenues, and new analysis of mobile broadband distribution and retail strategies reflecting the convergence of the mobile and PC segments.

The report identifies strengths and weaknesses in the emerging mobile broadband ecosystem with comprehensive analysis of key value chain segments including technologies, standards, systems, equipment, devices, applications and services. It also details how mobile broadband is competing and converging with fixed broadband services.

THIS EDITION WILL GIVE YOU:

Comprehensive subscriber & device forecasts to 2013

Benefit from expert mobile broadband forecasts. Including subscriber and device unit sales forecasts for HSDPA, HSUPA, HSPA+, LTE, EV-DO, EV-DO Rev. A/B, and TD-SCDMA & WiMAX

Detailed coverage of LTE including strategies, timelines and forecasts

Assess the realistic opportunities and challenges of LTE with two chapters of analysis on LTE status, timelines and deployment strategies, and a third chapter with new LTE subscriber, device and data revenues forecasts through 2013

Exclusive operator service revenues forecasts

Identify the commercial potential of mobile broadband with exclusive forecasts for operator data service revenues and ARPU segmented by region and device type. Benefit from strategic analysis and forecasts of mobile broadband in the context of the overall converging mobile, broadband and Internet markets

Detailed, independent operator & vendor case studies

Assess the threats and opportunities of mobile broadband with in-depth, factual operator and vendor case studies which contain detailed analysis and data on current performance and forward strategy

An insight into the impact of the economic downturn on the mobile broadband boom

Understand how the mobile broadband boom that started in 2007-08 will be impacted by the global economic downturn, with detailed market analysis and forecasts that have been comprehensively produced in light of the new economic realities

In-depth trend analysis & expert future outlook

Benefit from authoritative analysis of the current trends and future outlook for mobile broadband strategies, services, networks, devices and results by region and technology to help you determine how and where to invest to gain maximum returns over the next five years.

KEY DATA AND FORECASTS TO 2013

LTE forecasts

- LTE subscribers by region & device type
- LTE device unit sales by region & type
- LTE portable device unit sales – USB modems, datacards, netbooks & notebooks
- LTE data service revenues
- LTE data ARPU by region & device type

Mobile broadband portable market forecasts including USB modems, datacards, netbooks & notebooks

- Portable device subscribers by region

- Portable device subscribers by technology
- Portable device unit sales by region
- Portable device unit sales by technology
- Portable device unit sales by type – USB modems, datacards, netbooks & notebooks
- Mobile broadband USB modems & datacard unit sales by region
- Mobile broadband netbooks / netbooks unit sales by region
- Mobile broadband penetration of netbooks
- Portable market data service revenues by technology & region

Mobile broadband operator data service revenues forecasts

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- Data service revenues by device type – mobile & portable
- ARPU by region
- ARPU by device type – mobile & portable
- Total mobile industry data service revenues by region
- Mobile broadband as a proportion of total mobile data service revenues by region

Now includes detailed forecasts on the mobile broadband portable market including **USB modems, datacards, netbooks & notebooks**



CASE STUDIES

Operators

AT&T
China Mobile
Mobilkom Austria
NTT DoCoMo
Telefonica
Telstra
T-Mobile
Verizon Wireless
Vodacom
Vodafone

Vendors

Alcatel-Lucent
Cisco
Ericsson
Huawei
Motorola
NEC
Nokia Siemens Networks
Nortel
Samsung
ZTE

THE 3RD EDITION IS PACKED WITH DATA AND ANALYSIS THAT YOU CAN'T BE WITHOUT:

New detailed analysis and forecasts on LTE timelines, rollout strategies, devices, subscribers and service revenues

New subscriber, device and service revenues forecasts generated in light of the financial crisis and economic downturn, and fully segmented by technology including HSPA and EV-DO to LTE

New mobile broadband operator case studies including: AT&T, China Mobile, Mobilkom Austria, NTT DoCoMo, T-Mobile, Telefonica, Telstra, Verizon Wireless, Vodacom & Vodafone.

New dedicated coverage and forecasts for mobile broadband portable market including USB modems and notebooks / netbooks

New and unique analysis of operator and vendor distribution & retail strategies for mobile broadband including mobile devices such as the iPhone 3G

New and exclusive primary data and analysis on mobile broadband service pricing by region

New analysis on mobile broadband convergence with—and substitution for—fixed broadband

New profiles on mobile broadband strategies & results of network vendors including Alcatel-Lucent, Cisco, Ericsson, Huawei, Motorola, NEC, Nokia Siemens Networks, Nortel, Samsung and ZTE

New and exclusive analysis on mobile broadband market current status including data on networks deployed, subscribers and devices, with segmentation by technology and region

New chapter on Mobile Internet market developments driving demand for mobile broadband networks, devices & services

KEY QUESTIONS ANSWERED BY THIS REPORT:

- When and how will LTE be deployed, and how will LTE subscribers, device unit sales and data service revenues progress through 2013?
- How will the global financial crisis and economic downturn impact the mobile broadband market including operator and vendor strategy, subscribers, device unit sales and service revenues?
- How have two of the biggest mobile hits of recent years – the iPhone 3G and USB modems – helped turn mobile broadband into one of the top strategic and commercial opportunities in the converging mobile, broadband and Internet markets?
- How and when will mobile broadband evolve from basic broadband access to more advanced value-added services, and what impact will this have on operator revenues?
- Which mobile broadband technologies will account for the most subscribers and device unit sales in 2008-13 in each region worldwide—HSDPA, HSUPA, HSPA+, LTE, EV-DO, EV-DO Rev. A/B, TD-SCDMA or WiMAX?
- Why did UMB fail and what are the strengths, weaknesses and realistic prospects for the two leading next-generation systems based on OFDMA/MIMO—LTE and WiMAX?
- How will the mobile broadband market be impacted by new technologies such as WiMAX and TD-SCDMA, new device classes including USB modems and netbooks, and new types of infrastructure such as femtocells?

Mobile broadband global subscriber forecasts

- Mobile broadband subscribers by device type—mobile & portable
- Mobile broadband subscribers by region
- Mobile broadband subscribers by technology
- Mobile subscribers & penetration by region
- Mobile broadband to mobile subscriber penetration by major region
- Mobile & mobile broadband subscribers by generation/technology

Mobile broadband subscriber forecasts by technology

- HSDPA subscribers by region
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- EV-DO Revision A/B subscribers by region
- TD-SCDMA subscribers worldwide by region
- WiMAX subscribers by region

Mobile broadband subscriber forecasts by region

- North America mobile & mobile broadband subscribers by generation/technology
- Latin America mobile & mobile broadband subscribers by generation/technology
- Asia-Pacific mobile & mobile broadband subscribers by generation/technology
- Europe mobile & mobile broadband subscribers by generation/technology
- Africa/Middle East mobile & mobile broadband subscribers by generation/technology

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Mike Roberts



Mike Roberts is lead author of Future Mobile Broadband: HSPA and EV-DO to LTE Networks, Devices & Services and a Principal Analyst at Informa Telecoms & Media. His research focus is mobile networks including mobile broadband, LTE, WiMAX, Wi-Fi, wireless VoIP, fixed-mobile convergence and IP Multimedia Subsystem. His primary outputs are Informa intelligence centers and reports, including WiMAX Broadband Convergence: Emerging Fixed, Portable & Mobile Internet Markets, and Mobile Networks Forecasts: Future Mobile Traffic, Base Stations & Revenues. Mike has been tracking emerging mobile, wireless and fixed markets since 2000, when he started contributing to Informa research services such as 3G Wireless Broadband, Global Mobile and Telecom Markets. He regularly presents and chairs at key industry events including WiMAX, HSPA, Wireless VoIP and 3G LTE. Mike also provides expert commentary to the press on mobile broadband, convergence and related topics.

Richard Jesty



Richard Jesty is an author of Future Mobile Broadband: HSPA and EV-DO to LTE Networks, Devices & Services and an Associate Analyst at Informa Telecoms & Media with a focus on mobile content and services worldwide. Richard has worked in research-based IT and telecoms consultancy for fifteen years, and has gained first hand experience of vertical industry needs and requirements, especially in the service sector (covering the retail/distribution and financial services industries). His recent reports include WiMAX Broadband Convergence: Emerging Fixed, Portable & Mobile Internet Markets, Mobile Content & Applications, Mobile Payments, Mobile Distribution & Retail and Mobile Enterprise.

Dimitris Mavrakis



Dimitris Mavrakis is an author of Future Mobile Broadband: HSPA and EV-DO to LTE Networks, Devices & Services and an Associate Analyst at Informa Telecoms & Media. Dimitris has a BEng in Telecommunications Engineering and a PhD in Mobile Communications. Dimitris is an author of other Informa reports including WiMAX Broadband Convergence: Emerging Fixed, Portable & Mobile Internet Markets, Mobile Broadband Access at Home, and IMS Opportunities and Challenges. He has also carried out many consultancy projects for leading mobile operators and vendors.

WHO SHOULD READ THIS REPORT?

Mobile, Wireless & Fixed Service Providers:

Understand the opportunities, threats and realistic timelines of the mobile broadband market. Use detailed operator case studies to identify new strategies, business models and services to maximize revenue opportunities

Infrastructure and Equipment Suppliers:

Use authoritative mobile broadband infrastructure forecasts and competitor profiles to drive your business forward and base future decisions on accurate data and independent analysis from leading industry experts

Software, Application and Content Providers:

Gain an in-depth understanding of how mobile broadband services,

applications, devices and equipment will develop and assess the impact this will have on your strategies, products and services

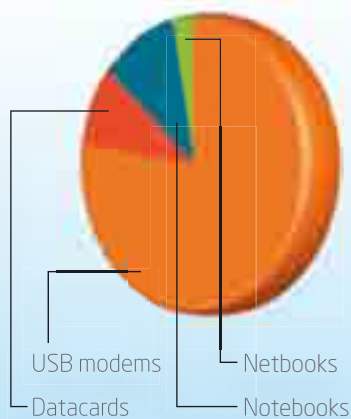
Consultants, Analysts, Financial and Government Organisations:

Develop a thorough understanding of the global mobile broadband and converging broadband markets and base future investments and recommendations on unbiased, unique analysis and primary data

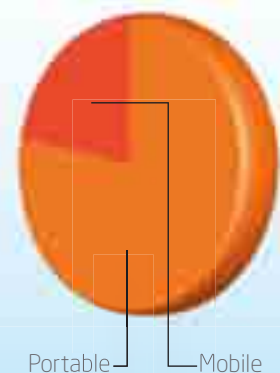
Mobile, Portable and Fixed Device and Component Vendors:

Use detailed mobile broadband device forecasts to understand the key commercial opportunities and challenges for devices by region and type including handsets, PC cards/notebooks and fixed devices.

Mobile broadband portable devices unit sales, 2008



LTE data service revenues, 2010



Source: Informa Telecoms & Media

Broadband convergence subscriber forecasts

- Fixed broadband subscribers by technology & region
- Total broadband subscribers by fixed, portable & mobile
- Total broadband subscribers by technology
- Total broadband subscribers by region
- Mobile broadband penetration of total broadband market

Global devices forecasts

- Total mobile device unit sales by region

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