



# The World Telecom Services Market

20<sup>th</sup> Edition

Market &  
Data  
Reports

This report analyses the overriding trends and changes taking place in telecom services markets around the globe. It explores the driving forces behind the market's growth and transformation including an examination of the chief market trends, the latest news about the operators with the main merger and acquisitions and their rankings, plus volume and value forecasts up to 2014 by geographical areas, countries and markets.

## Key questions

- With close to 2% growth worldwide the recovery is confirmed, yet is the gap between developed and emerging markets getting wider?
- Can strong growth in mobile data offset declining voice revenues?
- Is the expansion of broadband Internet and data services sufficient to support the markets' growth?
- What effect do changes in market hierarchies have on operator rankings?

## > Database (Excel)

### Markets and Forecasts up to 2014 by country and by segment:

- Fixed telephony
- Mobile services: 2G/3G
- Data and Internet: Dial-up, DSL, Cable modem, FTTx





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### DATABASE (Excel)

#### Indicators for each zone & country analysed:

- Historical data 2006 - 2009
- Estimates for 2010
- Forecasts 2011-2014

#### Key indicators

- Fixed telephony
  - PSTN/ISDN lines
  - Annual change (%)
  - Density (% of population)
- Mobile services
  - Mobile subscribers
  - 2G subscribers and 3G subscribers
  - Prepaid subscribers and Postpaid subscribers
- Internet
  - Internet subscribers
  - Dial-up subscribers
  - Broadband subscribers
    - . DSL subscribers
    - . Cable modem subscribers
    - . FTTx subscribers
    - . Other broadband subscribers
    - . VoIP subscribers

#### Revenue indicators

- Fixed telephony
- Mobile services
  - Mobile voice services
  - Mobile data services
- Internet and Data
  - Corporate data services
  - Internet services

## Countries & Regions

### North America

- Canada
- USA

### Latin America

- Brazil
- Mexico

### Asia-Pacific

- China
- India
- Japan
- South Korea

### Africa-Middle East

### European Union

- Austria
- Belgium
- Bulgaria
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Netherlands
- Poland
- Portugal
- Romania
- Slovenia
- Spain
- Sweden
- UK

### Rest of Europe

- Norway
- Russia
- Switzerland
- Turkey

Report (PDF) +  
Database (Excel)  
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Update Database June & December 2010



Examples of data tables excerpted from the basis for the report

### Telecom services market in value - Norway

	2006	2007	2008	2009	2010F	2011F	2012F	2013F	2014F
<b>National currency (NOK)</b>									
Fixed telephony	8 811	7 688	6 713	6 180	5 769	5 540	5 435	5 408	5 447
Mobile services	14 343	14 849	15 289	15 314	15 366	15 461	15 607	15 883	16 216
Mobile voice services	11 690	11 839	11 989	11 694	11 371	11 132	11 003	11 087	11 254
Mobile data services	2 653	3 010	3 300	3 620	3 995	4 329	4 604	4 797	4 962
Internet & data	7 232	7 703	8 511	9 024	9 444	9 909	10 405	10 913	11 408
Corporate data services	2 209	2 183	2 314	2 350	2 397	2 445	2 494	2 544	2 595
Internet services	5 023	5 520	6 197	6 674	7 047	7 464	7 911	8 369	8 813
<b>Total telecom services</b>	<b>30 386</b>	<b>30 240</b>	<b>30 513</b>	<b>30 518</b>	<b>30 579</b>	<b>30 910</b>	<b>31 447</b>	<b>32 204</b>	<b>33 071</b>
<b>USD</b>									
Fixed telephony	1 401	1 222	1 067	983	917	881	864	860	866
Mobile services	2 280	2 361	2 431	2 435	2 443	2 458	2 481	2 525	2 578
Mobile voice services	1 858	1 882	1 906	1 859	1 808	1 770	1 749	1 763	1 789
Mobile data services	422	479	525	576	635	688	732	763	789
Internet & data	1 150	1 225	1 353	1 435	1 501	1 575	1 654	1 735	1 814
Corporate data services	351	347	368	374	381	389	396	404	412
Internet services	799	878	985	1 061	1 120	1 187	1 258	1 331	1 401
<b>Total telecom services</b>	<b>4 831</b>	<b>4 808</b>	<b>4 851</b>	<b>4 852</b>	<b>4 862</b>	<b>4 914</b>	<b>4 999</b>	<b>5 120</b>	<b>5 258</b>
<b>EUR</b>									
Fixed telephony	1 008	880	768	707	660	634	622	619	623
Mobile services	1 641	1 699	1 750	1 752	1 758	1 769	1 786	1 818	1 856
Mobile voice services	1 338	1 355	1 372	1 338	1 301	1 274	1 259	1 269	1 288
Mobile data services	304	344	378	414	457	495	527	549	568
Internet & data	828	881	974	1 033	1 081	1 134	1 191	1 249	1 305
Corporate data services	253	250	265	269	274	280	285	291	297
Internet services	575	632	709	764	806	854	905	958	1 009
<b>Total telecom services</b>	<b>3 477</b>	<b>3 460</b>	<b>3 492</b>	<b>3 492</b>	<b>3 499</b>	<b>3 537</b>	<b>3 599</b>	<b>3 685</b>	<b>3 785</b>

Source : IDATE, in "World Telecom Service Market", 2010 Edition - Update June 2010

### Growth of telecom services market in value – Mexico (Annual growth rate at current prices (%))

	2006	2007	2008	2009	2010F	2011F	2012F	2013F	2014F
Fixed telephony	2,4%	-2,3%	-8,0%	-10,9%	-11,8%	-8,3%	-5,4%	-3,9%	-2,5%
Mobile services	21,6%	23,7%	11,5%	6,3%	8,6%	7,8%	6,8%	6,0%	5,3%
Mobile voice services	20,7%	19,8%	8,2%	1,6%	5,8%	5,0%	4,8%	4,6%	4,6%
Mobile data services	30,3%	56,7%	33,3%	30,9%	19,8%	17,7%	13,2%	10,2%	7,3%
Internet & data	13,8%	12,2%	16,8%	9,9%	10,0%	9,3%	9,2%	8,0%	7,3%
Corporate data services	10,3%	10,1%	9,4%	-2,9%	3,0%	5,0%	9,0%	9,0%	9,0%
Internet services	17,5%	14,3%	24,2%	21,0%	14,8%	12,1%	9,3%	7,4%	6,2%
<b>Total telecom services</b>	<b>12,3%</b>	<b>12,0%</b>	<b>5,4%</b>	<b>1,5%</b>	<b>3,4%</b>	<b>4,4%</b>	<b>4,8%</b>	<b>4,5%</b>	<b>4,3%</b>

Source : IDATE, in "World Telecom Service Market", 2010 Edition - Update June 2010

### Subscribers – China – (Thousands, unless otherwise mentioned)

	Dec. 31	2006	2007	2008	2009	2010F	2011F	2012F	2013F	2014F
<b>Fixed telephony</b>										
PSTN / ISDN Lines		367 786	365 448	340 804	314 000	294 000	282 451	274 842	269 840	267 473
Annual change (%)		4,9%	-0,6%	-6,7%	-7,9%	-6,4%	-3,9%	-2,7%	-1,8%	-0,9%
Density (% of population)		28,0%	27,6%	25,6%	23,5%	21,8%	20,8%	20,1%	19,6%	19,3%
<b>Mobile services</b>										
Mobile subscribers		461 082	547 285	641 230	747 000	866 629	974 343	1 063 055	1 130 834	1 172 941
Annual change (%)		17,2%	18,7%	17,2%	16,5%	16,0%	12,4%	9,1%	6,4%	3,7%
Density (% of population)		35,1%	41,4%	48,2%	55,8%	64,3%	71,8%	77,8%	82,2%	84,7%
2G subscribers		461 082	547 285	640 964	736 610	825 477	878 635	877 882	830 228	744 342
Annual change (%)		17,2%	18,7%	17,1%	14,9%	12,1%	6,4%	-0,1%	-5,4%	-10,3%
3G subscribers		0	0	266	10 390	41 152	95 707	185 173	300 606	428 599
Annual change (%)		-	-	-	3806,0%	296,1%	132,6%	93,5%	62,3%	42,6%
Prepaid subscribers		296 763	364 908	441 166	537 376	-	-	-	-	-
Annual change (%)		30,6%	23%	21%	22%	-	-	-	-	-
Postpaid subscribers		164 319	182 377	200 064	209 624	-	-	-	-	-
Annual change (%)		-1,1%	11%	10%	5%	-	-	-	-	-
<b>Internet</b>										
Internet subscribers		84 072	85 898	96 726	113 935	135 248	159 243	191 084	232 279	270 234
Annual change		4,5%	2,2%	12,6%	17,8%	18,7%	17,7%	20,0%	21,6%	16,3%
Density (% of population)		6,4%	6,5%	7,3%	8,5%	10,0%	11,7%	14,0%	16,9%	19,5%
Dial-up subscribers		32 174	19 534	13 300	10 709	8 085	5 427	3 416	2 063	1 108
Annual change		-28,3%	-39,3%	-31,9%	-19,5%	-24,5%	-32,9%	-37,1%	-39,6%	-46,3%
Density (% of population)		2,4%	1,5%	1,0%	0,8%	0,6%	0,4%	0,3%	0,2%	0,1%
Broadband subscribers		51 898	66 364	83 426	103 226	127 163	153 816	187 669	230 216	269 126
Annual change		46,0%	27,9%	25,7%	23,7%	23,2%	21,0%	22,0%	22,7%	16,9%
Density (% of population)		3,9%	5,0%	6,3%	7,7%	9,4%	11,3%	13,7%	16,7%	19,4%
DSL subscribers		37 120	52 016	67 018	83 896	-	-	-	-	-
Cable modem subscribers		0	0	0	0	-	-	-	-	-
FTTX subscribers		0	100	230	799	-	-	-	-	-
Other broadband subscribers		14 778	14 248	16 178	18 531	-	-	-	-	-
VoIP subscribers		720	1 400	3 000	7 000	9 132	13 353	25 675	49 914	71 806

Source : IDATE, in "World Telecom Service Market", 2010 Edition - Update June 2010