

BRIC Mobile Opportunities

Markets & Forecasts

2008-2013

This insightful report brings together data and forecasts on four of the fastest growing economies in the world today: Brazil; Russia; India; and China (BRIC). For each of the four countries, the report discusses the political and commercial climate, the adoption of 3G, the uptake and value of mobile data services, and an analysis of the top 25 leading players.

The report provides six-year projections for the total value of the telecoms market within the BRIC countries as well as subscriber forecasts by 2G and 3G platforms. Also included are operator revenues and ARPU forecasts for individual countries within the BRIC cluster.

Country specific historical growth is provided from 2003 onwards together with an examination of subscriber growth. An analysis of how each of the major network operators and their mobile operations cross over into fixed and broadband services is also presented, where appropriate.

Key Questions Addressed by this Report:

- Why are Brazil, Russia, India and China viewed as economic powerhouses of the future and what binds these disparate countries together?
- What is the current and future value of mobile services within the BRIC economies?
- What are the opportunities for subscriber growth across the BRIC markets?
- Who are the leading players within the BRIC mobile markets and what are their prospects for the future?
- What is the state of 3G licensing & network deployment in BRIC markets?
- What obstacles are hindering the 3G licensing process in the world's two largest mobile markets, India and China?

Key Benefits:

- A unique source of combined research and analysis for the BRIC mobile marketplace including technologies, market characteristics and forecasts.
- Practical analysis of emerging opportunities for vendors & operators.
- Unique insights: includes interviews with leading players who have significant experience of the mobile BRIC market.
- Benefit from fresh thinking and intelligent market assessment.

A circular badge with a purple gradient background. The text "Free Telecoms whitepapers" is written in white, bold, sans-serif font. Below the text are three small white dots.

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BRIC Mobile Opportunities: Analysis & Forecasts

report overview

This is the vital report for any global telecom player who already operates within the BRIC economies, as well as an excellent source of data and analysis for those who are looking to enter any of these markets over the next few years. The report is designed as a practical tool for anyone wishing to explore and take advantage of the attractive BRIC opportunity. For each of the burgeoning markets, the report appraises the current and future subscriber mix, 3G adoption rates, service revenues, voice revenues and data revenues and provides commentary on some of the key developments within these rapidly-developing countries. Through commentary and easy to understand tables and charts, the report investigates the rapid growth of telecoms within these four pivotal markets.

analysis & forecasts

Report Analysis

6 Year Analytical Forecasts provide a focused forward-thinking market clarity concerning prepaid/postpaid and 3G subscribers, and operator billed/non-voice revenues & ARPU across key growth mobile sectors over the next five years.

Split by 4 Key Countries Brazil; Russia; India; China.

Historical Analysis up until 2007 includes prepaid and postpaid users, subscribers by technology, and operator ARPUs and revenues.

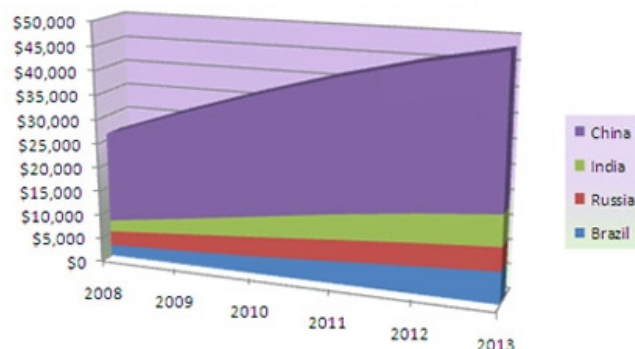
Visual Breakdown with 20 tables & charts offering invaluable forecast conclusions for helping realise future market potential.

Market Forecast Suite 2008-2013

Mobile Subscribers (by country) total (m) and penetration (%); prepaid & postpaid (m and %); total 3G (m) & as a % of total user base for Brazil; Russia; India; China

Operator Revenues (by country) operator billed mobile revenues & non-voice revenues (\$m) for Brazil; Russia; India; China

BRIC Economies - Operator Data Revenues (\$m), by Key Country, 2008-2013



Operator ARPU (by country) operator billed ARPU & non-voice ARPU (\$) for Brazil; Russia; India; China

our background

Juniper Research specialises in providing high quality analytical research reports & consultancy services to the telecoms industry. We have particular expertise in mobile, wireless, broadband & IP-convergence.

Juniper is independent & provides authoritative assessments of markets, technologies & industry players. Our analysts are experienced senior managers with proven track records in each of their specialist fields.

Each report is thoroughly researched, intelligently written & proof-read by qualified experts prior to publication. The report offers a rich mix of graphics, illustrations, technology roadmaps and tables.

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Executive Summary

BRIC Overview

Market Background

- BRIC Theses; mobile markets background

Regional Forecasts

- Subscriber growth: subscriber mix; 3G adoption
- Mobile ARPU; Revenue (service; voice; data)

1. Brazil

Market Background

- Key social, economic and telecoms indicators; Leading mobile players, operating subsidiaries and regional coverage

Market Overview

- Mobile subscribers: prepaid/postpaid users; by technology (GSM, CDMA, TDMA, iDEN, AMPS) 2003-07
- Operator ARPUs & revenues: operator share and subscribers 2007; ARPUs by operator 2006-07; operator-billed total and non voice revenue and ARPU 2006-07
- Mergers & acquisitions; 3G licensing; Mobile WiMAX

Market Forecasts

- Mobile subscribers: total (m) and penetration (%); prepaid & postpaid (m and %); total 3G (m) & as a % of total user base 2008-2013
- Operator revenues & ARPU: operator billed mobile revenues & non-voice revenues (\$m); operator billed ARPU & non-voice ARPU (\$) 2008-2013

Operator Profiles

- VIVO; TIM Brasil; Claro Digital; Brasil Telecom; Oi/Telemar; CTBC Celular; Nextel Brazil

Regulation

- Overview; Legislation; Issues affecting mobile operators

2. Russia

Market Background

- Key social, economic and telecoms indicators; Leading mobile operators and their ownership

Market Overview

- Mobile subscriber growth trends: prepaid and postpaid users 2003-07
- Operator market share & subscribers; Operator share December 2007
- Operator ARPUs & revenues: ARPUs by operator; operator billed revenue (total & non-voice) & ARPU 2006-07
- Market value: growth of telecoms services market revenues 2003-07; telecoms revenues breakdown 2007
- Mergers & acquisitions; 3G licensing; Mobile WiMAX

Market Forecasts

- Mobile subscribers: total (m) and penetration (%); prepaid & postpaid (m and %); total 3G (m) & as a % of total user base 2008-2013
- Operator revenues & ARPU: operator billed mobile revenues & non-voice revenues (\$m); operator billed ARPU & non-voice ARPU (\$) 2008-2013

Operator Profiles

- Mobile TeleSystems; Vimpel Communications (BeeLine); MegaFon; Tele2 Russia; Svyazinvest Group; SMARTS Group; SkyLink Group

Regulation

3. India

Market Background

- Key social, economic and telecoms indicators; Leading mobile operators and their ownership

Market Overview

- Mobile subscribers: mobile subscriber growth 2003-07
- Operator market share 2003-07
- Operator ARPUs & revenues: operator-billed revenue growth, split by voice, P2P messaging and non P2P messaging data 2003-07; operator-billed revenue and ARPU (total & non-voice) 2006-07
- Mergers & acquisitions; Network development; 3G licensing; Mobile WiMAX

Market Forecasts

- Mobile subscribers: total (m) and penetration (%); prepaid & postpaid (m and %); total 3G (m) & as a % of total user base 2008-2013

- Operator revenues & ARPU: operator billed mobile revenues & non-voice revenues (\$m); operator billed ARPU (split by total ARPU & non-voice ARPU) (\$) 2008-2013

Operator Profiles

- Bharat Sanchar Nigam Ltd (BSNL); Mahanagar Telephone Nigam Ltd (MTNL); Bharti Airtel; Reliance Communications; Vodafone Essar; Idea Cellular; Spice Communications; Aircel; Tata Teleservices

Regulation

- Overview; Legislation; Issues affecting mobile operators

4. China

Market Background

- Key social, economic and telecoms indicators; Leading mobile operators and their ownership

Market Overview

- Mobile subscriber growth: prepaid/postpaid users; by technology (GSM & CDMA) 2003-07
- Operator market shares Dec 2007
- Operator ARPUs & revenues: ARPUs by operator; operator billed revenue (total & non-voice) & ARPU 2006-07
- Market value: growth of telecoms services market revenues 2003-07
- Mobile handset sales and production; Industry restructuring; 3G licensing; Mobile WiMAX

Market Forecasts

- Mobile subscribers: total (m) and penetration (%); prepaid & postpaid (m and %); total 3G (m) & as a % of total user base 2008-2013
- Operator revenues & ARPU: operator billed mobile revenues & non-voice revenues (\$m); operator billed ARPU & non-voice ARPU (\$) 2008-2013

Operator Profiles

- China Telecom; China Mobile; China Unicom; China Netcom; China TieTong

Regulation

- Overview; Foreign ownership; Telecommunications regulations; Licensing; Interconnection; Technical standards; Capital investment

110 Pages



companies included

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author profile

Andrew Kitson is a Senior Analyst with Juniper Research. He is responsible for developing Juniper's range of telecoms markets reports and expanding into a number of new telecoms and media sectors, including devices and business practices. He has been researching and analysing the telecommunications industry since 1985 studying the business models and structures of many of the world's leading telecoms operators, service providers, equipment manufacturers/vendors, and system integrators. Andrew's published work has included a series of regular reports discussing and analysing the key developments and forward-looking trends in fixed-line, mobile communications, and broadband in more than 60 countries and regional sectors. His special focus reports have covered the BRIC (Brazil, Russia, India and China) economies, the Middle East, and Western Europe as well as mobile broadband services in Eastern Europe, Africa, and the Middle East.

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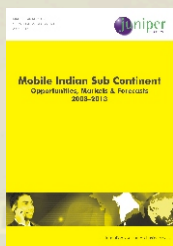
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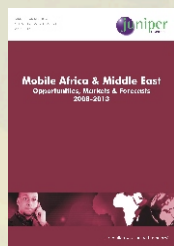
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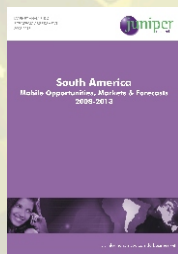
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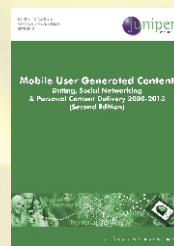


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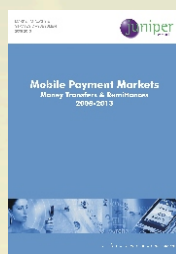
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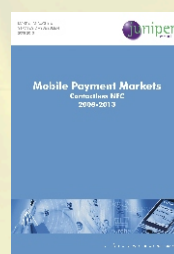
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