

# Low Cost Handsets

## Markets, Opportunities & Forecasts 2009-2014

### Low cost handset forecasts: Shipments; Subscribers; Platforms; Prepaid

This report investigates the opportunity for operators to 'connect the unconnected', focusing on the market for low cost handsets for users in emerging markets and consumers in developed markets who have a very limited budget for a handset.

It provides six-year forecasts, across eight regions of the world projecting general mobile subscriber growth by technology (2G, 3G, 3.5G, 3.9G), total mobile device shipment volumes per annum, low-cost device shipment volumes per annum, and overall subscriber penetration and prepaid subscriber rates, up until 2014.

A number of key low cost handset manufacturers are profiled along with operators, chip manufacturers, OS providers and access companies. The report also covers the main initiatives over the last four years to deliver low cost handsets to consumers in emerging markets, referencing the GSMA's emerging market handset program as well as the GSM association's '3G for all' initiative and Nokia lifetool's trials in India.

#### Key Questions Addressed by this Report:

- Why are operators and vendors focusing on low-income consumers for growth?
- How are operators and vendors accessing the low-income segment?
- What tools or mechanisms will help low-income users to access mobile devices and services?
- How many low-cost handsets have been sold/shipped in recent years?
- How many low-cost handsets are forecast to be sold (globally and by region) over the next six years?
- What proportion of mobile devices sold each year will be low-cost handsets in the 2009-2014 period?

#### Key Benefits:

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



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# Low Cost Handsets: Analysis & Forecasts

## report overview

This report includes a number of key drivers and constraints for the low cost, entry-level handset market, fully investigating the opportunity for operator's to increase their subscriber base through targeting the unserved.

This report is aimed at handset providers, mobile network operators, software producers, content providers, and applications developers and vendors. It includes one on one interviews with key executives of device manufacturers and software providers. Also included are a number of profiles from key members of the low cost handset value chain.

## analysis & forecasts

### Report Analysis

**6 Year Analytical Forecasts** provide an extensive market breakdown focusing on shipments, subscribers, platforms and prepaid across key 8 key regions until 2014.

**Split by 8 Key Regions** North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific and Africa & Middle East.

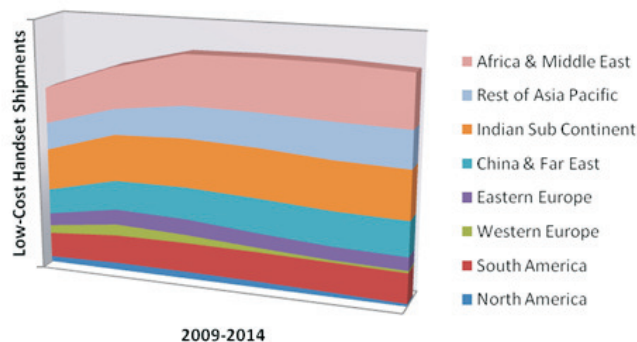
**Complete Market Breakdown** offering a thorough appraisal of the driving market influences, restrictions and key player initiatives and profiles across the low-cost handset sector.

**Visual Clarity** with 27 tables and 26 colour forecast charts.

### Market Forecast Suite 2009-2014

**Low-Cost Handset Shipments** total mobile phone shipments; low-cost mobile device shipments; by technology; by region; low-cost mobile devices as a proportion of total mobile device shipments; total shipments by handset type; market share by handset type

### Low-Cost Handsets Shipments Per Annum, By Region 2009-2014



**Subscribers** growth; base market share; penetration; 3G by technology; prepaid mobile subscribers as percentage of overall subscriber base

**Revenues** mobile ARPU; non-voice mobile ARPU

## our background

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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

Introduction

What is the Report About?

Drivers and Opportunities

Hurdles & Obstacles

Low-Cost Mobile Device Shipment

Forecasts

## 1. The Low-Cost Handset Market

Introduction

Low Cost Handset Initiatives

- Industry-sponsored initiatives: GSM Association's emerging market handset programme; GSMA development fund (completed projects, December 2008, segmented by focus area); Mobile ULC2 Alliance initiative; GSM Association's 3G for All initiative
- Operators' own initiatives: Zain; MTN; Vodafone (Vodafone 125 handset)
- Handset vendors' initiatives - Nokia: background; entry device market size (Nokia 1661 low cost mobile handset; Nokia 1202 low cost mobile handset); low-income users drive future growth - affordability is key; micro-finance helps stimulate demand; a service-based approach can help; the next step - data and internet access; geographic penetration; Nokia's view - key market drivers and trends; Nokia's view - hurdles and obstacles
- Handset vendors' initiatives: Motorola.TTP Com; QuickTel/China TechFaith; M-Tech Zambia; Xenitis Telecommunications
- Applications providers' initiatives - ACCESS: background; platforms and applications; ALP Mini - potential use in entry devices; ACCESS' view - key market drivers and trends; ACCESS' view - hurdles and obstacles

## 2. Drivers and Opportunities

Introduction

Drivers

- Increase in subscriber base; Cost

savings; Increase in operators' revenues; Increased marketing opportunities

Opportunities

- Nokia Life Tools (Indian pilot results - % of services by overall subscriptions); Nokia's Mail on Ovi service

## 3. Obstacles & Barriers

Introduction

Consumer Wealth & Finance

- Total cost of ownership (the average TCO for lower-income consumers, 2005 versus 2007)
- Microfinance: Nokia's experience; Grameen Foundation's Mifos initiative
- Phone sharing: overview; Nokia gets involved; Grameen Foundation's Village Phone programme (GrameenPhone's Village Phone scheme in action, Bangladesh)
- ARPU: mobile ARPU; non-voice mobile ARPU

Power Availability

- Coral-200-Solar
- Wind-up mobile phone charger

Lack of Network Availability

- Access to mobile networks
- Growth of the mobile market: mobile subscriber growth; mobile subscriber base market share; mobile subscribers penetration
- Growth of 3G: global mobile subscribers by technology (2G, 2.5G, 3G, 3.5/ 3.9G)

Availability of Prepaid Services

- Proportion of prepaid mobile subscribers as percentage of overall subscriber base

## 4. Low-Cost Handset Shipment Forecasts

Forecast Overview

Growth of Mobile Devices Market

- Global mobile devices market growth

Global Low-Cost Mobile Device Market Growth

- Mobile device shipments: low-cost/entry-level mobile device; low-

cost/entry level device as a proportion of total mobile device shipments

Regional Low-Cost Mobile Device Market Growth

- Total mobile phone shipments by technology (2G, 2.5G, 3G, 3.5/ 3.9G); Low-cost mobile device shipments by technology: North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East

Low-Cost & High-End Devices Squeeze Out Mid-Range Handsets

- Total shipments of mobile handsets by type (low-cost devices, mid-range devices, smartphones)
- Market shares of mobile handsets by type (low-cost devices, mid-range devices, smartphones)

## 5. Key Players: Equipment Suppliers, Operators & Third Parties

Overview

Nokia

- Overview; Financial performance; Products (devices; services & software - Ovi)

Motorola

- Overview; Financial performance; Products

Qualcomm

- Overview; Financial performance; Products

Infineon Technologies

- Overview; Financial performance; Products

ZTE

- Overview; Financial performance; Products (GSM handsets; CDMA handsets; WCDMA handsets; TD-SCDMA handsets); Shipments



## 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 analysing the key developments and forward-looking trends in fixed-line, mobile communications, and broadband in more than 60 countries and regional sectors. Andrew previously worked for TIR, ITI (formerly part of Espicom) BMI.

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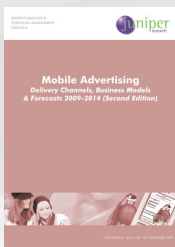
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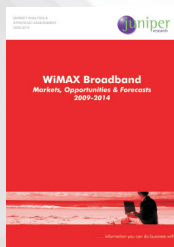
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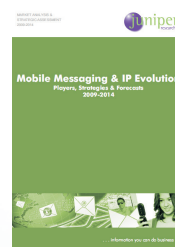
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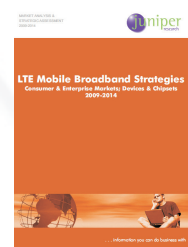
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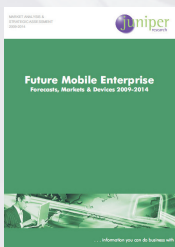
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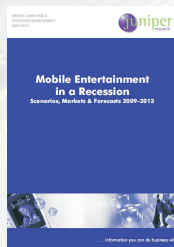
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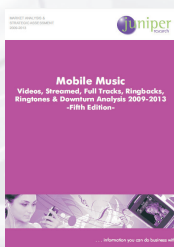
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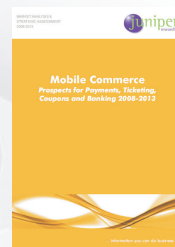
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