Ongoing analysis of the latest trends in intermodal substitution and convergent technology and services

Telecoms access and usage is rapidly migrating from traditional telephony to mobile, broadband, and convergent IP-based platforms. The pace of this intermodal substitution will vary greatly across different country markets, however, driven by disparate competitive, regulatory, economic, and cultural conditions. Global Insight's new Telecoms Intermodal Forecasting Service is designed to offer industry players in-depth and ongoing analysis of forecast drivers, forecasts, and convergent strategies across an initial set of 20 key developed and emerging markets.

The Telecoms Intermodal Forecasting Service allows fixed/integrated, mobile, and cable TV operators; equipment vendors; financial institutions; and other players to understand and target revenue opportunities across the broadband, mobile, and fixed markets. It also assists clients in shaping their business strategies and tracking competitors' and customers' service portfolios across 20 key markets.

Clients will receive:
- Forecasts on 20 countries, reviewed and updated on a quarterly basis, based on the latest available market data
- Five-year intermodal forecasts based on 23 indicators
- Country reports on convergent trends and forecast drivers, including fixed-mobile convergence and substitution, WiMAX, and IP TV
- In-depth analysis of convergent services, technologies, and scenarios via our monthly Special Reports
- Same-Day Analysis (SDA) of intermodal trends, convergent technologies, and the latest service offerings
- Rankings of the state of convergence across the 20 markets
- Competitive matrices showing the service portfolios of over 100 telecoms operators
Global Insight’s intermodal telecoms forecasts are based on an econometric model fed by approximately 10,000 data points covering:

- Global Insight’s unique pool of economic and demographic forecasts
- Deeply researched telecoms data on lines, subscribers, revenues, and average revenue per user (ARPU) for the fixed-line, mobile, and broadband as well as fixed and mobile traffic
- Regulatory, technology, and competitive matrices including pricing for fixed-line, mobile, and broadband services

**Features**

- Quarterly reviewed and updated forecasts on 20 countries:
  - **Asia:** China, India, Japan, and South Korea
  - **Europe:** Czech Republic, France, Germany, Hungary, Italy, Poland, Russia, Spain, Ukraine, and United Kingdom
  - **Latin America:** Argentina, Brazil, Chile, and Mexico
  - **North America:** Canada and the United States

- Five-year forecasts for the above countries on 23 indicators:
  - **Fixed:** lines in service, penetration (percent of households and percent of population), service revenue and ARPU (local currency and US$), percent of GDP
  - **Mobile:** subscribers, penetration (percent of population), service revenue, service revenue and ARPU (local currency and US$), percent of GDP
  - **Broadband:** subscribers, penetration (percent of households and percent of population), service revenue and ARPU (local currency and US$), percent of GDP

**COUNTRY REPORTS**

The country reports provide an explanation of the drivers behind the forecasts and an ongoing analysis of the most recent trends including fixed-mobile convergence and substitution, WiMAX, VoIP, and IP TV.

**Features**

- Quarterly reviewed and updated country reports for above 20 countries
- Each country report contains the following sections:
  - Intermodal forecasts, downloadable into Excel®
  - Explanation of forecast assumptions and drivers
  - Competitive matrices
  - Convergence rankings
  - Intermodal and convergence trends
  - Analyst contact details

**INTERMODAL TELECOMS FORECASTS**

Intermodal effects (fixed-to-mobile and fixed-to-broadband/IP substitution) drive the model through the incorporation of pricing and other drivers of behavior (economic, demographic, and regulatory) into the equations for fixed-line, mobile, and broadband customers/lines and revenues.

**SPECIAL REPORTS**

One Special Report is published on a monthly basis that offers analysis of key scenarios and implications affecting the industry.

**Features**

- Analysis of the usage and future demand for new convergent services, such as IP TV
- Assessments of the impact of VoIP on both fixed and mobile markets
- Scenarios on the technology market shares and revenue outlook for the broadband markets in the world’s largest emerging markets
- Analysis of the drivers (particularly regulatory) of intermodal substitution and convergence
- Analysis of the implications of intermodal substitution and convergence on industry players, including fixed-line and cable TV operators
- Timely analysis of industry views on convergence going into the next decade

**SAME-DAY ANALYSIS (SDA)**

A monthly Intermodal and Convergence Review assesses the most recent trends and drivers for substitution and convergence across Asia, Europe, Latin America, and North America.

**CONVERGENCE RANKINGS**

Each quarter, our experts rank the convergent status of all 20 markets based on 20 sets of regulatory, technology, and service criteria.

The following illustrates 5 of the 20 criteria we analyze:

<table>
<thead>
<tr>
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<th>COUNTRY 3</th>
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<tbody>
<tr>
<td>Does the country have competitive fixed-voice market?</td>
<td>✔</td>
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</tr>
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**COMPETITIVE MATRICES**

Our competitive matrices provide a diagrammatic and ongoing view of the rapidly changing service portfolios of over 100 telecoms operators across 20 countries, including FMC, WiMAX, VoIP, and pay-TV.
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ABOUT GLOBAL INSIGHT TELECOMMUNICATIONS
Global Insight’s telecommunications practice offers products and services that provide an independent, comprehensive range of analysis, forecasts, data, and consulting services for:

- Fixed-line, integrated, and mobile operators
- Cable operators and Internet service providers (ISPs)
- Wholesale and data carriers
- Equipment and software vendors
- Financial- and professional-services organizations
- Governments and regulatory bodies

We provide you with timely, insightful, and accurate analysis on the evolving market, regulatory, and competitive landscape, enabling you to:

- Evaluate market opportunities and risks
- Assess investment opportunities
- Monitor your competitors and customers
- Stay up-to-date with recent industry developments

MORE INFORMATION
Global Insight’s telecommunications consultants and industry experts are always available to answer questions and offer customized solutions for your unique challenges. For more information about Global Insight’s telecommunications practices, products, and services, please visit:

www.globalinsight.com/telecoms

THE POWER OF PERSPECTIVE
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CONTACT US

NORTH AMERICA
U.S./Canada 1.800.933.3374
Mexico 1.800.687.2565

EUROPE
Frankfurt +49 (0)69.20973.0
London +44 (0)20.7452.5000
Milan +39 02.86481.1
Paris +33 (0)1.5545.2600

MIDDLE EAST AND AFRICA
Pretoria +27 (0)11.265.5420

ASIA
Beijing +86 13.5529.98911
Shanghai +86 21.5228.1470
Singapore +65 6430.6621
Tokyo +81 (0)3.5219.1314

TELECOMS INTERMODAL FORECASTING SERVICE

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