

Report Synopsis

2005 saw this huge industry amass revenues of USD1.71 trillion, 14% more than in 2004 and the majority of which came from telecom services. The shift away from fixed-line to wireless technology is changing the landscape – encouraging new entrants and forcing industry participants to alter the way they think and the services they provide. New business models focused on the convergence of telecoms, IT and media in what has commonly been termed ‘Triple Play’, will drive the industry going forwards, and in particular VoIP is changing the nature of voice communication.

With near saturation in developed markets, successful companies need to keep on top of technological advances such as 3G and broadband, as well as keep track of the changing habits of consumers. Low mobile penetration rates, high GDP growth and increasing disposable income in China and India indicate that enormous opportunities exist in these markets.

The reduction of trade restrictions and other regulatory barriers has led to an increased flow of telecoms services across borders. Critically, average revenue per user is declining as service providers are fighting a daily battle for market share and brand leadership. Focus in saturated developed markets is on increasing ARPUs through value added data services while capturing non-users in lower income groups in developing markets will drive ARPUs still lower.

This report provides information essential to any business or person connected to the telecoms industry. It outlines the underpinning growth drivers, technology, regulations and major markets and players that affect profitability and survival in this important industry.

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